

Draft

February 14, 2017

Fresno County 2050 Growth Projections

Prepared for:

Fresno County Council of Governments

Prepared by:

Applied Development Economics, Inc.

1756 Lacassie Avenue, Suite 100, Walnut Creek, CA 94596 ■ 925.934.8712
www.adeusa.com

In Association with:

Mintier Harnish Associates



TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
2050 Growth Projections	3
Population and Demographic Projections for Fresno County	12
Employment Projections	16
Methodology	20
Countywide Employment Projections	21
Countywide and City-Level Population Projections	27
Projecting Housing Units Based on Household Projections, Vacant Stock, And Vacancy Rates	31
City-Level Employment Projections	41
Detailed Projections	51
Clovis	51
Coalinga.....	55
Firebaugh.....	59
Fowler	63
Fresno	67
Huron.....	71
Kerman.....	76
Kingsburg.....	80
Mendota.....	84
Orange Cove.....	88
Parlier.....	92
Reedley.....	96
Sanger.....	100
San Joaquin.....	104
Selma.....	108
Fresno County (Unincorporated)	112

TABLES

Table 1 – Population and Employment Projections by Jurisdiction Sphere of Influence	2
Table 2 – Comparison of Existing Population and Employment Projections	5

Table 3 – Woods and Poole Historical and Projected Employment	6
Table 4 – Woods and Poole Population Projections for California and the San Joaquin Valley Counties, 2010-2050.....	8
Table 5 – Department of Finance Population Projections for California and the San Joaquin Valley Counties, 2010-2050	9
Table 6 – Caltrans Population Projections for California and the San Joaquin Valley Counties, 2010-2040	10
Table 7 – Caltrans Employment Projections	11
Table 8 – ADE Population Projections by Jurisdiction	12
Table 9 –Projections of Household and Group Quarters Populations	13
Table 10 - ADE Projections of Households.....	13
Table 11 – Fresno County Household Income Projections	14
Table 12 - Trends and Projections in Total Number of Persons in Fresno County by Age	15
Table 13 – Projection of Total Population by Race\Ethnicity, Fresno County: 2015 – 2050.....	15
Table 14 - Fresno County Public School Enrollment of School-Age Children.....	16
Table 15 - New Units Required Over 35-Year 2015-2050 Period by Unit Building Type.....	17
Table 16 – Fresno County Employment Projections by Sector, 2015-2050	17
Table 17 - ADE Employment Projections by City, 2015-2050	19
Table 18 - Employment Development Department Economic Base Job Estimates and Projections.....	23
Table 19 – Caltrans Estimates and Projections of Fresno County Economic Base Industries	23
Table 20 – Regional Commute Patterns: 2010 and 2014	26
Table 21 – Projection of Total Population: Fresno County and Local Jurisdictions: 2015 – 2050.....	29
Table 22 – ADE Projections of Households	30
Table 23 – Projected Required New Housing Units Based on Projected Household Increases, Vacancy Rates, Vacant Stock, and Replacement Allowances: 2015-2050	32
Table 24 – Number of Years to Fulfill RHNA Obligations via Future Housing Units Based on Household Projections.....	33
Table 25 – Number of Years to Fulfill Development Potential of Vacant Sites via Future Housing Units Based on Household Projections.....	34
Table 26 – Residential Projects in the Development Pipeline by City	35
Table 27 – Industry Sectors by Land Use Category	42
Table 28 – Jobs by Jurisdiction SOI and Sector, 2014.....	43
Table 29 - LEHD Base Data	44
Table 30 – Estimated Historical Growth Trends by Industry Sector – Fresno County 2002 - 2014.....	45
Table 31 – Estimated Historical Employment Growth Trends by City SOI	46
Table 32 – Non-Residential Projects in the Development Pipeline by City.....	47
Table 33 – Estimate of Past Job Trends: Clovis SOI.....	51
Table 34 – Job Projections for Clovis SOI by Sector, 2015-2050.....	52
Table 35 – Populations Projections for City of Clovis SOI: 2015-2050	52
Table 36 – Periodic Housing Unit Requirement Projections: Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates, Clovis SOI	53
Table 37 – Projections of Total Number of Persons in City of Clovis by Age	53

Table 38 – Projections of Total Number of Persons in Clovis by Race and Ethnicity, Clovis SOI	54
Table 39 – Clovis Household Income Projections.....	54
Table 40 – Estimate of Past Job Trends: Coalinga SOI	55
Table 41 – Job Projections for Coalinga SOI by Sector, 2015-2050	56
Table 42 – Population Projections: 2015-2050: City of Coalinga SOI.....	56
Table 43 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates, Coalinga SOI.....	57
Table 44 – Projections of Total Number of Persons by Age: Coalinga SOI	57
Table 45 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Coalinga SOI ..	58
Table 46 – Coalinga Household Income Projections	58
Table 47 – Estimate of Past Job Trends: Firebaugh SOI	59
Table 48 – Job Projections for Firebaugh SOI by Sector, 2015-2050	60
Table 49 – Populations Trends and Projections: 2015-2050: Firebaugh SOI	60
Table 50 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Firebaugh SOI.....	61
Table 51 – Trends and Projections in Total Number of Persons by Age: Firebaugh SOI	61
Table 52 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Firebaugh SOI	62
Table 53 – Firebaugh Household Income Projections	62
Table 54 – Estimate of Past Job Trends: Fowler SOI	63
Table 55 – Job Projections for Fowler SOI by Sector, 2015-2050.....	64
Table 56 – Populations Trends and Projections: 2015-2050: Fowler SOI.....	64
Table 57 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Fowler SOI	65
Table 58 – Trends and Projections in Total Number of Persons by Age: Fowler SOI	65
Table 59 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Fowler SOI.....	66
Table 60 – Fowler Household Income Projections.....	66
Table 61 – Estimate of Past Job Trends: Fresno SOI.....	67
Table 62 – Job Projections for Fresno SOI by Sector, 2015-2050.....	68
Table 63 – Populations Trends and Projections: 2015-2050: Fresno SOI	68
Table 64 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Fresno SOI	69
Table 65 – Trends and Projections in Total Number of Persons by Age: Fresno SOI.....	69
Table 66 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Fresno SOI	70
Table 67 – Fresno Household Income Projections.....	70
Table 68 – Estimate of Past Job Trends: Huron SOI	71
Table 69 – Job Projections for Huron SOI by Sector, 2015-2050	73
Table 70 – Populations Trends and Projections: 2015-2050: Huron SOI	73
Table 71 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Huron SOI.....	74
Table 72 – Trends and Projections in Total Number of Persons by Age: Huron SOI.....	74
Table 73 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Huron SOI	75
Table 74 – Huron Household Income Projections	75
Table 75 – Estimate of Past Job Trends: Kerman SOI	76

Table 76 – Job Projections for Kerman SOI by Sector, 2015-2050	77
Table 77 – Populations Trends and Projections: 2015-2050: Kerman SOI	77
Table 78 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Kerman SOI	78
Table 79 – Trends and Projections in Total Number of Persons by Age: Kerman SOI	78
Table 80 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Kerman SOI ...	79
Table 81 – Kerman Household Income Projections	79
Table 82 – Estimate of Past Job Trends: Kingsburg SOI	80
Table 83 – Job Projections for Kingsburg SOI by Sector, 2015-2050	81
Table 84 – Populations Trends and Projections: 2015-2050: Kingsburg SOI	81
Table 85 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Kingsburg SOI	82
Table 86 – Trends and Projections in Total Number of Persons by Age: Kingsburg SOI	82
Table 87 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Kingsburg SOI	83
Table 88 – Kingsburg Household Income Projections	83
Table 89 – Estimate of Past Job Trends: Mendota SOI	84
Table 90 – Job Projections for Mendota SOI by Sector, 2015-2050	85
Table 91 – Populations Trends and Projections: 2015-2050: Mendota SOI	85
Table 92 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Mendota SOI	86
Table 93 – Trends and Projections in Total Number of Persons by Age: Mendota SOI	86
Table 94 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Mendota SOI ..	87
Table 95 – Mendota Household Income Projections	87
Table 96 – Estimate of Past Job Trends: Orange Cove SOI	88
Table 97 – Job Projections for Orange Cove SOI by Sector, 2015-2050	89
Table 98 – Populations Trends and Projections: 2015-2050: Orange Cove SOI	89
Table 99 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Orange Cove SOI	90
Table 100 – Trends and Projections in Total Number of Persons by Age: Orange Cove SOI	90
Table 101 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Orange Cove SOI	91
Table 102 – Orange Cove Household Income Projections	91
Table 103 – Estimate of Past Job Trends: Parlier SOI	92
Table 104 – Job Projections for Parlier SOI by Sector, 2015-2050	93
Table 105 – Populations Trends and Projections: 2015-2050: Parlier SOI	93
Table 106 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Parlier SOI	94
Table 107 – Trends and Projections in Total Number of Persons by Age: Parlier SOI	94
Table 108 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Parlier SOI ...	95
Table 109 – Parlier Household Income Projections	95
Table 110 – Estimate of Past Job Trends: Reedley SOI	96
Table 111 – Job Projections for Reedley SOI by Sector, 2015-2050	97
Table 112 – Populations Trends and Projections: 2015-2050: Reedley SOI	97

Table 113 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Reedley SOI	98
Table 114 – Trends and Projections in Total Number of Persons by Age: Reedley SOI	98
Table 115 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Reedley SOI	99
Table 116 – Reedley Household Income Projections	99
Table 117 – Estimate of Past Job Trends: Sanger SOI	100
Table 118 – Job Projections for Sanger SOI by Sector, 2015-2050	101
Table 119 – Populations Trends and Projections: 2015-2050: Sanger SOI	101
Table 120 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Sanger SOI	102
Table 121 – Trends and Projections in Total Number of Persons by Age: Sanger SOI	102
Table 122 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Sanger SOI	103
Table 123 – Sanger Household Income Projections	103
Table 124 – Estimate of Past Job Trends: San Joaquin SOI	104
Table 125 – Job Projections for San Joaquin SOI by Sector, 2015-2050	105
Table 126 – Populations Trends and Projections: 2015-2050: San Joaquin SOI	105
Table 127 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: San Joaquin SOI.....	106
Table 128 – Trends and Projections in Total Number of Persons by Age: San Joaquin SOI.....	106
Table 129 – Trends and Projections in Total Number of Persons by Race and Ethnicity: San Joaquin SOI.....	107
Table 130 – San Joaquin Household Income Projections	107
Table 131 – Estimate of Past Job Trends: Selma SOI.....	108
Table 132 – Job Projections for Selma SOI by Sector, 2015-2050	109
Table 133 – Populations Trends and Projections: 2015-2050: Selma SOI	109
Table 134 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Selma SOI.....	110
Table 135 – Trends and Projections in Total Number of Persons by Age: Selma SOI.....	110
Table 136 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Selma SOI	111
Table 137 – Selma Household Income Projections	111
Table 138 – Estimate of Past Job Trends: Unincorporated County.....	112
Table 139 – Job Projections for Unincorporated Fresno County by Sector, 2015-2050	113
Table 140 – Populations Trends and Projections: 2015-2050: Unincorporated County	113
Table 141 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Unincorporated County.....	114
Table 142 – Trends and Projections in Total Number of Persons by Age: Unincorporated County.....	114
Table 143 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Unincorporated County	115
Table 144 – Fresno County Unincorporated Household Income Projections	115

EXECUTIVE SUMMARY

SUMMARY

This report provides growth projections for Fresno County and the spheres of influence of each of its cities between 2015 and 2050. The report was commissioned by the Fresno County Council of Governments (FCOG) to assist with updating the Regional Transportation Plan (RTP) as well as the Sustainable Communities Plan (SCP). Table 1 summarizes ADE's topline population and employment projections for the Fresno County region. The population projection is lower than both the existing Department of Finance (DOF) projections and the prior Fresno COG projections for 2050. However, it should be noted that both of those projections significantly over estimated recent population growth and were 9,400 and 38,000 above the actual 2015 population reported by DOF more recently, respectively. In general, DOF projects the San Joaquin Valley to increase this share of statewide population growth, although the counties with greatest growth acceleration are anticipated to be those closest to the Bay Area and the Southern California metropolitan regions. Fresno will share in some of this additional growth, particularly after 2025 when the High Speed Rail improves accessibility to the Bay Area.

In terms of total job growth, ADE projects the county will add 133,900 wage and salary jobs between 2015 and 2050. This equates to an average annual growth rate of about 3,825 jobs over 35 years. For comparison, EDD indicates the County added an average 3,600 jobs per year over the past 25 years, since 1990.

In addition to the population and employment projections, the report includes projections of demographic characteristics and housing demand, including the following:

- Households
- Housing
- Age Distribution
- Average Household Size
- Group Quarters Population
- Average Income
- Household Type
- Race/Ethnicity
- School Enrollment

Table 1 – Population and Employment Projections by Jurisdiction Sphere of Influence

JURISDICTION	2015	2020	2025	2030	2035	2040	2045	2050
Total Population								
County	972,300	1,047,440	1,122,840	1,191,850	1,258,860	1,323,070	1,383,690	1,447,090
Clovis SOI	114,770	126,850	136,350	145,050	153,490	161,580	169,220	177,210
Coalinga SOI	16,530	17,350	18,170	18,920	19,650	20,350	21,010	21,700
Firebaugh SOI	7,780	8,370	8,880	9,340	9,790	10,220	10,630	11,060
Fowler SOI	6,580	7,240	7,890	8,490	9,070	9,630	10,160	10,710
Fresno SOI	574,590	624,040	676,820	725,120	772,030	816,980	859,410	903,790
Huron SOI	6,820	7,430	7,600	7,750	7,900	8,050	8,180	8,330
Kerman SOI	14,880	15,900	16,930	17,860	18,770	19,650	20,470	21,330
Kingsburg SOI	12,750	13,670	14,590	15,440	16,260	17,050	17,790	18,570
Mendota SOI	11,210	11,920	12,630	13,280	13,920	14,520	15,090	15,690
Orange Cove SOI	9,360	9,540	9,710	9,880	10,030	10,190	10,330	10,480
Parlier SOI	15,100	15,870	16,640	17,350	18,040	18,700	19,330	19,980
Reedley SOI	25,570	27,150	28,740	30,200	31,610	32,960	34,240	35,580
Sanger SOI	26,310	27,860	29,410	30,840	32,220	33,540	34,790	36,100
San Joaquin SOI	4,040	4,310	4,580	4,830	5,070	5,310	5,520	5,750
Selma SOI	26,680	28,250	29,810	31,250	32,640	33,980	35,240	36,550
Balance of County	99,330	101,710	104,080	106,250	108,350	110,370	112,280	114,270
Total Jobs								
County	372,400	398,100	422,000	441,200	460,100	476,800	491,300	506,300
Clovis	32,400	34,680	36,640	38,560	40,460	42,270	43,970	45,740
Coalinga	2,820	3,050	3,160	3,290	3,420	3,540	3,660	3,780
Firebaugh	1,140	1,260	1,280	1,340	1,410	1,470	1,520	1,580
Fowler	2,400	2,770	2,890	3,030	3,170	3,300	3,420	3,540
Fresno	231,560	248,500	266,150	278,370	291,470	303,650	314,730	326,450
Huron	730	840	840	860	870	890	900	910
Kerman	2,680	2,890	3,130	3,290	3,440	3,580	3,720	3,860
Kingsburg	3,540	3,970	4,190	4,390	4,600	4,790	4,960	5,150
Mendota	890	900	910	950	990	1,030	1,060	1,100
Orange Cove	540	630	660	670	690	700	710	720
Parlier	2,230	2,380	2,530	2,630	2,720	2,810	2,890	2,970
Reedley	5,770	7,010	7,570	7,940	8,310	8,660	8,990	9,330
Sanger SOI	5,490	5,940	6,260	6,520	6,770	7,010	7,220	7,450
San Joaquin SOI	500	520	560	590	610	640	660	690
Selma	5,550	6,330	6,620	6,920	7,210	7,460	7,680	7,910
Balance of County	74,160	76,380	78,610	81,840	83,970	85,010	85,210	85,120

Source: ADE. Note: Totals may not add due to rounding.

2050 GROWTH PROJECTIONS

INTRODUCTION

This report presents projections for employment, population, housing and demographic characteristics for the Fresno County region. The projections reflect regional economic trends as well as land use plans for each of the jurisdictions in the county. In addition, the study team has compiled information about currently planned development projects that will drive growth in the short term. The study process has included outreach to all of the jurisdictions in the county to review local planning policies and development trends. In addition, a technical advisory committee, convened by the Fresno COG, has reviewed substantive elements of the analysis at several stages during the development of the projections.

The report begins with a review of regional economic trends and existing projections from state agencies and other economic forecast sources. This chapter then reviews the countywide projections and highlights of the city-level data, followed by a chapter describing the methodology for the analysis. Finally, the detailed jurisdictional projections are presented in the last chapter of the report.

EXISTING REGIONAL TRENDS AND PROJECTIONS

Fresno County is part of the San Joaquin Valley (SJV) regional economy in California and is affected not only by regional trends but also state and national economic conditions. We have included a review of projections from Woods and Poole Economics (W&P) because they provide a perspective on how SJV and Fresno County fit into the broader economic picture. Viewing the long term employment data from W&P, it is clear that California had an increasing share of US employment for the 20 years between 1970 and 1990, but then declined during the recessions in the mid 1990's and 2000's (Table 3). W&P projects California to regain its national share of employment but at a slower rate over the next 35 years that it had done earlier. The San Joaquin Valley (SJV) has fluctuated as a share of California state employment in the past and W&P forecasts the Valley to stabilize close to its current share of 8.2 to 8.3 percent of statewide employment. Fresno County is projected to maintain a fairly constant share of SJV jobs at about 26 percent.

However, in terms of population, W&P projects SJV to increase its share to 10.7 percent in 2010 to 11.3 percent by 2045 (Table 4). W&P also forecasts Fresno County to slightly increase its share of SJV population, from 23.4 percent in 2010 to 24.3 percent in 2050. The State Department of Finance (DOF) has a more aggressive scenario for SJV but not so for Fresno County. DOF projects SJV to increase its share of statewide population from 10.7 percent in 2010 to 13.4 percent in 2050 (Table 5). Under this scenario, Fresno County would reduce its share of regional population from 23.4 percent in 2010 to 21.9 percent of 2050. According to DOF the additional SJV growth would be concentrated in Kern County, with smaller increases in share going to San Joaquin, Merced and Madera Counties. DOF projects a higher population for Fresno County in 2050, at 1,464,413, than does W&P, at 1,445,076, but DOF projects the counties at the north and south ends of the Valley to grow more rapidly.

Caltrans has contracted with the California Economic Forecast to prepare state and county projections as well. These projections have lower population projections than either of the other two sources, reaching 1.25 million in Fresno County in 2040, compared to 1.3 million for both DOF and W&P. This reflects a slight decline in share for Fresno County from 23.6 percent in 2015 to 23.2 percent in 2040. SJV is projected to gain in statewide share of population from 10.7 percent in 2010 to 11.3 percent in 2040, similar to the W&P projection. Caltrans also projects SJV to maintain, but not increase, its statewide share of employment but Caltrans projects Fresno County to reduce its share of SJV jobs from 27.2 percent in 2010 to 25.8 percent in 2040. Kern and Madera Counties are projected to see slight increases in their SJV employment share.

In summary, these sources see the San Joaquin Valley continuing to provide a steady share of the state's economic activity, but potentially an increasing share of its population base. Much of the population and some of the employment growth, however, is driven by spillover effects from the Bay Area and the Southern California region. The interior counties of Fresno, Tulare and Kings are projected to see declining shares of growth. Madera County is a small market for growth but this may change with the recent plans to connect the High Speed Rail (HSR) with San Jose. Madera County has already entitled large residential developments poised to provide housing for workers employed in Fresno. Silicon Valley employers were quick to point out the HSR may extend their commute range to Madera County as well.

Table 2 – Comparison of Existing Population and Employment Projections

Projection Source	2010	2015	2020	2025	2030	2035	2040	2045	2050
Population									
DOF	932,969	981,681	1,055,106	1,130,406	1,200,666	1,269,714	1,332,913	1,396,837	1,464,413
Caltrans	932,392	978,775	1,037,791	1,093,696	1,147,330	1,200,659	1,254,509		
W&P	932,642	977,464	1,040,809	1,107,606	1,176,815	1,245,580	1,312,700	1,378,790	1,445,076
Prior Projections	929,758	1,010,080	1,082,097	1,154,741	1,227,649	1,300,597	1,373,679	1,447,198	1,521,496
Employment									
EDD	336,600	371,800	388,260	423,203					
EMSI	329,942	371,800	395,967	421,705					
Caltrans	334,170	372,308	402,438	417,765	434,471	452,465	468,817		
W&P	425,816	476,888	515,573	553,863	591,658	628,451	664,506	699,927	734,721
Prior FCOG Projections	326,900	348,282	369,665	391,047	412,430	433,812	455,195	476,577	497,960
GROWTH RATES (CAGR)									
Population									
DOF		1.0%	1.5%	1.4%	1.2%	1.1%	1.0%	0.9%	0.9%
Caltrans		1.0%	1.2%	1.1%	1.0%	0.9%	0.9%		
W&P		0.9%	1.3%	1.3%	1.2%	1.1%	1.1%	1.0%	0.9%
Prior Projections		1.7%	1.4%	1.3%	1.2%	1.2%	1.1%	1.0%	1.0%
Employment									
EDD*		2.0%	0.9%	1.7%					
EMSI		2.4%	1.3%	1.3%					
Caltrans		2.2%	1.6%	0.8%	0.8%	0.8%	0.7%		
W&P		2.3%	1.6%	1.4%	1.3%	1.2%	1.1%	1.0%	1.0%
Prior FCOG Projections		1.3%	1.2%	1.1%	1.1%	1.0%	1.0%	0.9%	0.9%

Source: ADE, Inc.

*Extrapolated by ADE from EDD's 2012-2022 projections.

Table 3 – Woods and Poole Historical and Projected Employment

Jurisdiction	1970	1975	1980	1985	1990	1995	2000	2005
UNITED STATES	91,277,573	98,900,540	113,983,152	123,796,761	138,330,928	147,915,852	165,370,857	172,557,332
California	9,056,899	10,286,335	12,761,968	14,284,993	16,834,529	16,939,788	19,280,927	20,255,745
San Joaquin Valley	700,411	845,295	1,012,577	1,087,013	1,275,542	1,381,857	1,529,907	1,660,142
Fresno,	180,331	222,294	275,119	292,648	342,583	377,757	401,005	428,516
Kern	138,871	170,338	202,904	223,570	253,757	278,215	311,129	345,020
Kings	28,533	32,738	35,017	36,261	40,087	45,163	49,602	55,661
Madera	16,486	21,108	27,856	30,234	35,425	44,780	51,583	58,244
Merced	45,454	56,335	64,044	66,196	76,728	77,042	83,240	88,255
San Joaquin	125,641	141,775	165,176	181,853	214,261	224,935	255,095	282,627
Stanislaus, CA	83,871	100,774	123,135	134,090	171,838	177,970	205,739	222,238
Tulare	81,224	99,933	119,326	122,161	140,863	155,995	172,514	179,581
Percent of Region								
Fresno	25.7%	26.3%	27.2%	26.9%	26.9%	27.3%	26.2%	25.8%
Kern	19.8%	20.2%	20.0%	20.6%	19.9%	20.1%	20.3%	20.8%
Kings	4.1%	3.9%	3.5%	3.3%	3.1%	3.3%	3.2%	3.4%
Madera	2.4%	2.5%	2.8%	2.8%	2.8%	3.2%	3.4%	3.5%
Merced	6.5%	6.7%	6.3%	6.1%	6.0%	5.6%	5.4%	5.3%
San Joaquin	17.9%	16.8%	16.3%	16.7%	16.8%	16.3%	16.7%	17.0%
Stanislaus	12.0%	11.9%	12.2%	12.3%	13.5%	12.9%	13.4%	13.4%
Tulare	11.6%	11.8%	11.8%	11.2%	11.0%	11.3%	11.3%	10.8%
SJV Percent of CA	7.7%	8.2%	7.9%	7.6%	7.6%	8.2%	7.9%	8.2%
CA Percent of US	9.9%	10.4%	11.2%	11.5%	12.2%	11.5%	11.7%	11.7%

Source: Woods and Poole

Table 3 – Woods and Poole Historical and Projected Employment (continued)

Location	2010	2015	2020	2025	2030	2035	2040	2045	2050
UNITED STATES	173,034,656	188,866,185	203,418,448	217,670,718	231,564,124	244,922,886	257,978,399	270,917,653	283,809,443
California	19,803,747	22,417,830	24,234,541	26,041,591	27,829,986	29,575,295	31,298,839	33,014,464	34,728,292
San Joaquin Valley	1,646,676	1,852,895	2,001,479	2,147,651	2,291,044	2,430,034	2,566,009	2,699,675	2,831,098
Fresno	425,816	476,888	515,573	553,863	591,658	628,451	664,506	699,927	734,721
Kern	353,907	419,702	456,024	492,282	528,104	563,248	598,102	632,830	667,326
Kings	54,991	59,340	63,376	67,217	70,900	74,377	77,700	80,898	83,969
Madera	57,226	64,323	69,212	73,947	78,514	82,850	86,992	90,946	94,712
Merced	90,680	102,122	109,975	117,625	125,151	132,501	139,758	146,984	154,209
San Joaquin	268,849	299,853	324,798	349,563	374,061	397,919	421,294	444,322	467,105
Stanislaus	209,191	231,869	250,247	268,181	285,772	302,803	319,511	336,011	352,339
Tulare	186,016	198,798	212,274	224,973	236,884	247,885	258,146	267,757	276,717
Percent of Region									
Fresno	25.9%	25.7%	25.8%	25.8%	25.8%	25.9%	25.9%	25.9%	26.0%
Kern	21.5%	22.7%	22.8%	22.9%	23.1%	23.2%	23.3%	23.4%	23.6%
Kings	3.3%	3.2%	3.2%	3.1%	3.1%	3.1%	3.0%	3.0%	3.0%
Madera	3.5%	3.5%	3.5%	3.4%	3.4%	3.4%	3.4%	3.4%	3.3%
Merced	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.4%	5.4%	5.4%
San Joaquin	16.3%	16.2%	16.2%	16.3%	16.3%	16.4%	16.4%	16.5%	16.5%
Stanislaus	12.7%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%	12.4%	12.4%
Tulare	11.3%	10.7%	10.6%	10.5%	10.3%	10.2%	10.1%	9.9%	9.8%
SJV Percent of CA	8.3%	8.3%	8.3%	8.2%	8.2%	8.2%	8.2%	8.2%	8.2%
CA Percent of US	11.4%	11.9%	11.9%	12.0%	12.0%	12.1%	12.1%	12.2%	12.2%

Source: Woods and Poole

Table 4 – Woods and Poole Population Projections for California and the San Joaquin Valley Counties, 2010-2050

Jurisdiction	Estimates	Projections							
	2010	2015	2020	2025	2030	2035	2040	2045	2050
California	37,336,011	39,155,924	41,124,667	43,170,810	45,250,597	47,253,843	49,138,037	50,930,191	52,678,078
Fresno	932,642	977,464	1,040,809	1,107,606	1,176,815	1,245,580	1,312,700	1,378,790	1,445,076
Kern	841,762	885,474	945,171	1,007,841	1,072,459	1,136,332	1,198,261	1,258,708	1,318,690
Kings	152,418	151,342	157,400	163,604	169,781	175,520	180,674	185,354	189,745
Madera	151,154	156,123	164,848	173,958	183,280	192,364	201,032	209,384	217,612
Merced	256,731	269,194	284,894	301,321	318,174	334,674	350,503	365,832	380,990
San Joaquin	687,513	723,300	765,865	810,424	856,176	901,022	944,104	985,882	1,027,237
Stanislaus	515,283	537,458	567,680	599,225	631,489	662,925	692,906	721,780	750,199
Tulare	443,292	462,456	486,127	510,710	535,681	559,731	582,348	603,844	624,780
SJV	3,980,795	4,162,811	4,412,794	4,674,689	4,943,855	5,208,148	5,462,528	5,709,574	5,954,329
Percent Share of Regional Total									
Fresno	23.4%	23.5%	23.6%	23.7%	23.8%	23.9%	24.0%	24.1%	24.3%
Kern	21.1%	21.3%	21.4%	21.6%	21.7%	21.8%	21.9%	22.0%	22.1%
Kings	3.8%	3.6%	3.6%	3.5%	3.4%	3.4%	3.3%	3.2%	3.2%
Madera	3.8%	3.8%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%
Merced	6.4%	6.5%	6.5%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4%
San Joaquin	17.3%	17.4%	17.4%	17.3%	17.3%	17.3%	17.3%	17.3%	17.3%
Stanislaus	12.9%	12.9%	12.9%	12.8%	12.8%	12.7%	12.7%	12.6%	12.6%
Tulare	11.1%	11.1%	11.0%	10.9%	10.8%	10.7%	10.7%	10.6%	10.5%
SJV share of California	10.7%	10.6%	10.7%	10.8%	10.9%	11.0%	11.1%	11.2%	11.3%

Source: Woods and Poole Economics, 2016 State Profile for California.

Table 5 – Department of Finance Population Projections for California and the San Joaquin Valley Counties, 2010-2050

Jurisdiction	Estimates	Projections							
	2010	2015	2020	2025	2030	2035	2040	2045	2050
California	37,341,978	38,896,969	40,619,346	42,373,301	44,085,600	45,747,645	47,233,240	48,574,095	49,779,362
Fresno	932,969	981,681	1,055,106	1,130,406	1,200,666	1,269,714	1,332,913	1,396,837	1,464,413
Kern	846,568	894,492	989,815	1,088,711	1,189,004	1,291,947	1,396,314	1,501,874	1,604,371
Kings	154,276	155,122	167,465	180,355	192,562	205,206	218,394	230,218	240,599
Madera	151,466	157,722	173,146	189,267	204,993	221,824	238,514	255,073	272,384
Merced	256,800	269,572	288,991	313,082	337,798	364,348	389,934	414,895	439,075
San Joaquin	687,095	723,506	766,644	822,755	893,354	966,889	1,037,761	1,104,903	1,171,439
Stanislaus	515,459	538,689	573,794	611,376	648,076	681,703	714,910	748,324	783,005
Tulare	443,487	467,170	498,559	537,015	578,858	616,547	650,819	683,533	715,722
SJV	3,988,120	4,187,954	4,513,520	4,872,967	5,245,311	5,618,178	5,979,559	6,335,657	6,691,008
Percent Share of Regional Total									
Jurisdiction	2010	2015	2020	2025	2030	2035	2040	2045	2050
Fresno	23.4%	23.4%	23.4%	23.2%	22.9%	22.6%	22.3%	22.0%	21.9%
Kern	21.2%	21.4%	21.9%	22.3%	22.7%	23.0%	23.4%	23.7%	24.0%
Kings	3.9%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.6%	3.6%
Madera	3.8%	3.8%	3.8%	3.9%	3.9%	3.9%	4.0%	4.0%	4.1%
Merced	6.4%	6.43%	6.4%	6.4%	6.4%	6.5%	6.5%	6.5%	6.6%
San Joaquin	17.2%	17.3%	17.0%	16.9%	17.0%	17.2%	17.4%	17.4%	17.5%
Stanislaus	12.9%	12.9%	12.7%	12.5%	12.4%	12.1%	12.0%	11.8%	11.7%
Tulare	11.1%	11.2%	11.0%	11.0%	11.0%	11.0%	10.9%	10.8%	10.7%
SJV share of California	10.7%	10.8%	11.1%	11.5%	11.9%	12.3%	12.7%	13.0%	13.4%

Source: California Department of Finance.

Table 6 – Caltrans Population Projections for California and the San Joaquin Valley Counties, 2010-2040

Jurisdiction	Estimate	Projections					
	2010	2015	2020	2025	2030	2035	2040
California	37,310,000	38,870,000	40,810,000	42,780,000	44,520,000	46,030,000	47,780,000
Fresno	932,392	978,775	1,037,791	1,093,696	1,147,330	1,200,659	1,254,509
Kern	841,189	882,480	954,191	1,031,474	1,106,477	1,176,052	1,240,496
Kings	152,696	150,746	157,713	165,965	174,888	183,006	190,192
Madera	151,329	156,002	165,177	174,057	183,697	194,350	206,028
Merced	255,897	268,002	284,431	303,043	321,705	340,039	356,585
San Joaquin	686,585	721,120	757,607	790,921	826,222	858,192	886,319
Stanislaus	515,194	534,605	559,097	585,812	612,925	637,626	658,010
Tulare	443,111	463,927	495,937	528,226	557,117	584,304	610,413
SJV	3,978,393	4,155,656	4,411,944	4,673,195	4,930,359	5,174,227	5,402,552
Percent Share of Regional Total							
Fresno	23.4%	23.6%	23.5%	23.4%	23.3%	23.2%	23.2%
Kern	21.1%	21.2%	21.6%	22.1%	22.4%	22.7%	23.0%
Kings	3.8%	3.6%	3.6%	3.6%	3.5%	3.5%	3.5%
Madera	3.8%	3.8%	3.7%	3.7%	3.7%	3.8%	3.8%
Merced	6.4%	6.4%	6.4%	6.5%	6.5%	6.6%	6.6%
San Joaquin	17.3%	17.4%	17.2%	16.9%	16.8%	16.6%	16.4%
Stanislaus	12.9%	12.9%	12.7%	12.5%	12.4%	12.3%	12.2%
Tulare	11.1%	11.2%	11.2%	11.3%	11.3%	11.3%	11.3%
SJV share of California	10.7%	10.7%	10.8%	10.9%	11.1%	11.2%	11.3%

Source: The California Economic Forecast, California County-Level Economic Forecast 2015-2040. Caltrans. September 2015.

Table 7 – Caltrans Employment Projections

Jurisdiction	Estimates			Projections					
	2000	2005	2010	2015	2020	2025	2030	2035	2040
California	14,998,000	15,390,000	14,599,000	16,468,000	17,588,000	18,388,000	19,235,000	20,062,000	20,896,000
Fresno	331,260	348,320	334,170	372,308	402,438	417,765	434,471	452,465	468,817
Kern	244,130	269,240	274,010	325,574	349,389	365,123	381,976	399,987	416,315
Kings	38,310	42,120	42,850	44,634	47,864	50,125	52,538	54,832	57,070
Madera	39,700	44,600	43,600	50,528	55,086	58,107	61,594	65,544	69,608
Merced	64,350	69,840	68,620	77,817	81,728	84,416	87,310	90,647	93,653
San Joaquin	203,610	223,790	206,960	231,235	248,265	258,115	270,680	282,851	295,113
Stanislaus	161,130	175,190	162,700	180,897	194,270	201,929	210,401	219,458	227,710
Tulare	134,140	141,690	144,760	152,678	163,251	168,584	174,310	180,571	187,047
SJV	1,216,630	1,314,790	1,277,670	1,435,671	1,542,291	1,604,162	1,673,281	1,746,355	1,815,334
Percent Share of Region									
Fresno	27.2%	26.5%	26.2%	25.9%	26.1%	26.0%	26.0%	25.9%	25.8%
Kern	20.1%	20.5%	21.4%	22.7%	22.7%	22.8%	22.8%	22.9%	22.9%
Kings	3.1%	3.2%	3.4%	3.1%	3.1%	3.1%	3.1%	3.1%	3.1%
Madera	3.3%	3.4%	3.4%	3.5%	3.6%	3.6%	3.7%	3.8%	3.8%
Merced	5.3%	5.3%	5.4%	5.4%	5.3%	5.3%	5.2%	5.2%	5.2%
San Joaquin	16.7%	17.0%	16.2%	16.1%	16.1%	16.1%	16.2%	16.2%	16.3%
Stanislaus	13.2%	13.3%	12.7%	12.6%	12.6%	12.6%	12.6%	12.6%	12.5%
Tulare	11.0%	10.8%	11.3%	10.6%	10.6%	10.5%	10.4%	10.3%	10.3%
SJV percent of CA	8.1%	8.5%	8.8%	8.7%	8.8%	8.7%	8.7%	8.7%	8.7%

Source: Caltrans

POPULATION AND DEMOGRAPHIC PROJECTIONS FOR FRESNO COUNTY

According to the most-current population estimate issued by the California Department of Finance, there are 972,297 persons in Fresno County (Table 8). At 574,600 persons, the City of Fresno and its surrounding Sphere of Influence (Fresno SOI) account for almost 60 percent of the county population. There are 114,800 persons (11.8 percent of the county) in Clovis and its SOI (Clovis SOI), making this the next largest area, followed by the Selma SOI area at 26,700 persons (1.2 percent). Between 2015 and 2050, total population in Fresno County is projected to grow by 474,800 persons, or by 48.8 percent over the 35 year period. The Fresno SOI area is projected to grow by 57.3 percent over the 35-year 2015-2050 period, or by 329,200 persons.

Table 8 – ADE Population Projections by Jurisdiction

Jurisdiction	2015	2050	Change	Percent Change
Fresno County	972,300	1,447,090	474,790	48.8%
Clovis SOI	114,770	177,210	62,440	54.4%
Coalinga SOI	16,530	21,700	5,170	31.3%
Firebaugh SOI	7,780	11,060	3,280	42.2%
Fowler SOI	6,580	10,710	4,130	62.8%
Fresno SOI	574,590	903,790	329,200	57.3%
Huron SOI	6,820	8,330	1,510	22.1%
Kerman SOI	14,880	21,330	6,450	43.3%
Kingsburg SOI	12,750	18,570	5,830	45.7%
Mendota SOI	11,210	15,690	4,480	40.0%
Orange Cove SOI	9,360	10,480	1,120	12.0%
Parlier SOI	15,100	19,980	4,880	32.3%
Reedley SOI	25,570	35,580	10,010	39.1%
Sanger SOI	26,310	36,100	9,780	37.2%
San Joaquin SOI	4,040	5,750	1,710	42.3%
Selma SOI	26,680	36,550	9,870	37.0%
Balance of County	99,330	114,270	14,940	15.0%

Source: ADE. Note: Totals may not add due to rounding.

The vast majority of persons reside in households. Of the 972,300 persons in Fresno County in 2015, 954,500 (98.1 percent) are in households, versus 17,800 (1.9 percent) who are in group quarters (Table 9). The number of persons in group quarters is projected to increase to 26,150 persons in 2050. However, at 1.8 percent of total population, the share of persons in group quarter in 2050 is similar to the current share. The average household size for the county is projected to fluctuate slightly over the next ten years, hovering around 3.19 and 3.13, but then increase gradually to 3.35 by 2050.

Table 9 –Projections of Household and Group Quarters Populations

Year	Total Number of Persons	Persons in Households	Persons in Group Quarters	Number of Households	Average Household Size
2015	972,300	954,410	17,890	299,450	3.19
2020	1,047,440	1,028,750	18,690	328,300	3.13
2025	1,122,840	1,102,610	20,230	348,120	3.17
2030	1,191,850	1,170,080	21,770	362,860	3.22
2035	1,258,860	1,236,110	22,750	375,290	3.29
2040	1,323,070	1,299,170	23,900	388,930	3.34
2045	1,383,690	1,358,690	25,000	405,260	3.35
2050	1,447,090	1,420,940	26,150	424,480	3.35
15-50 Chng	474,790	466,530	8,260	125,030	
15-50 CAGR	1.14%	1.14%	1.09%	1.00%	

Source: ADE (note: CAGR = compound annual growth rate)

There are 299,450 households in Fresno County, according to the California Department of Finance (Table 10). The number of households in the County is projected to grow by 125,030, up to a total of 424,480 in 2050. Households in the Fresno SOI area are projected to grow by 86,420 between 2015 and 2050, going from 181,800 to 268,260. Areas such as Clovis SOI are projected to grow considerably as well, adding 18,210 households on top of the 2015 base of 40,700 households.

Table 10 - ADE Projections of Households

Jurisdiction	2015	2050	Change	Percent Change
Fresno County	299,450	424,480	125,030	41.8%
Clovis SOI	40,660	58,870	18,210	44.8%
Coalinga SOI	4,000	4,960	960	23.9%
Firebaugh SOI	2,000	2,670	670	33.3%
Fowler SOI	2,060	3,150	1,090	52.6%
Fresno SOI	181,830	268,260	86,420	47.5%
Huron SOI	1,570	1,790	230	14.5%
Kerman SOI	4,110	5,530	1,410	34.4%
Kingsburg SOI	4,340	5,930	1,590	36.6%
Mendota SOI	2,500	3,280	780	31.2%
Orange Cove SOI	2,160	2,270	110	5.0%
Parlier SOI	3,480	4,320	840	24.1%
Reedley SOI	7,020	9,160	2,140	30.5%
Sanger SOI	7,320	9,410	2,100	28.6%
San Joaquin SOI	900	1,200	300	33.5%
Selma SOI	7,470	9,600	2,130	28.5%
Uninc. Area excl. SOIs	28,000	34,070	6,060	21.7%

Source: ADE, Inc. Note: Totals may not add due to rounding.

Average household incomes are projected to increase in real dollar terms during the projection period. In the short term this will be driven by implementation of the State's minimum wage law. Over the longer term, incomes will increase with the shift in employment from agriculture to professional services and health care types of jobs. Table 11 projects the distribution of households by income category (\$2015).

Table 11 – Fresno County Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	23,980	23,360	21,700	19,310	18,290	17,430	16,770	16,510
\$10,000 to \$24,999	59,340	57,820	53,700	47,780	45,260	43,140	41,510	40,860
\$25,000 to \$34,999	34,700	33,810	31,400	27,940	26,460	25,220	24,270	23,890
\$35,000 to \$49,999	40,030	45,060	42,340	38,270	36,250	34,550	33,240	32,730
\$50,000 to \$74,999	52,750	62,760	74,230	85,630	82,330	81,160	82,030	80,760
\$75,000 to \$99,999	33,420	39,760	47,030	54,250	62,840	70,650	78,190	85,730
\$100,000 to \$149,999	33,700	40,090	47,420	54,700	63,360	71,240	78,840	87,840
\$150,000 or more	21,540	25,630	30,320	34,970	40,510	45,540	50,400	56,150
Total	299,450	328,300	348,120	362,860	375,290	388,930	405,260	424,480
Mean Income	\$63,920	\$67,590	\$72,490	\$77,540	\$82,120	\$85,850	\$88,890	\$91,790
CAGR		1.1%	1.4%	1.4%	1.2%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

The following tables present county-level projections for various demographic attributes. As indicated in the table below, while the population as a whole is projected to grow annually by 1.1 percent between 2015 and 2050, certain age cohorts are projected to grow at a faster rate. The number of persons between 65 and 74 is expected to grow annually by 1.9 percent, while the number of those 75 and over will grow by 3.0 percent a year (Table 12). As a percentage of total population, persons 65 and over will comprise 17.7 percent of the total population in 2050, versus their current 11.5 percent share. While the median age will go from 31 to 35, the age of persons at the 80th percentile is projected to go from 55 to 62.

Of the 972,300 persons in Fresno County, Latinos are the largest racial\ethnic category at 506,800 (52.1 percent of the total), with Whites-Not Latinos second at 301,300 (31.0 percent)(Table 13). The number of Latinos is projected to grow to 919,300 (63.5 percent) in 2050, or by 412,500 persons between 2015 and 2050. Whites are projected to grow over the next ten years but then gradually decrease to 299,600, slightly below their current level.

Table 12 - Trends and Projections in Total Number of Persons in Fresno County by Age

Age Group	2015	2050	15-50 Change	15-50 CAGR*	'15 Share	'50 Share
Fresno County	972,300	1,447,100	474,800	1.1%	100.0%	100.0%
5 and below	91,400	131,900	39,100	1.0%	9.5%	9.1%
6 to 14	137,200	182,800	48,600	0.9%	14.1%	12.8%
15 to 19	74,700	96,300	24,000	0.8%	7.7%	6.8%
20 to 24	80,500	95,300	16,500	0.5%	8.3%	6.7%
25 to 34	144,200	183,800	41,800	0.7%	14.8%	12.8%
35 to 44	118,300	171,100	52,500	1.1%	12.2%	11.8%
45 to 54	113,300	162,500	47,400	1.0%	11.6%	11.1%
55 to 64	101,300	162,400	59,300	1.3%	10.4%	11.1%
65 to 74	63,900	125,400	59,900	1.9%	6.6%	8.5%
75 and above	47,600	135,500	85,600	3.0%	4.9%	9.2%
20th percentile age	12	13				
Median age	31	35				
80th percentile age	55	62				

Source: ADE (*note: CAGR = compound annual growth rate)

Table 13 – Projection of Total Population by Race\Ethnicity, Fresno County: 2015 – 2050

	All	White	Latino	Asian	Black	Other
2015	972,300	301,300	506,800	92,300	46,200	25,700
2020	1,047,400	306,800	563,500	100,300	49,300	27,500
2025	1,122,900	310,400	622,600	108,300	52,300	29,300
2030	1,191,800	309,900	681,100	115,100	54,700	31,000
2035	1,258,900	307,100	741,500	121,000	56,700	32,600
2040	1,323,100	302,500	802,600	126,100	58,000	33,900
2045	1,383,600	300,400	860,000	130,000	58,600	34,600
2050	1,447,000	299,600	919,300	133,900	59,000	35,200
2015-2050	474,700	-1,700	412,500	41,600	12,800	9,500

Source: ADE

Of the 972,300 persons in Fresno County in 2015, 212,100 (21.8 percent) are ages 5 to 18 (Table 14). The California Department of Finance (DOF) projects the number of K-12 public school students through 2025 based on their own demographic projections, which are higher than the ADE population projections. The DOF trend shows a slightly declining share of school age children actually enrolled in school, a trend that is corroborated by State Department of Education studies of recent past trends. ADE projected this trend forward using our own demographic projections for Fresno County as shown in Table 14. We project K-12 public school enrollment to increase to 256,100 in 2050, or 59,100 more than the 2015 figure of 197,000.

Table 14 - Fresno County Public School Enrollment of School-Age Children

Year	Total School-Age Youth (5 to 18)	ADE Projections K-12 Enr. Projections	Participation Rate
2015	212,100	197,000	92.9%
2020	219,400	203,100	92.6%
2025	229,900	212,000	92.2%
2030	240,600	221,100	91.9%
2035	252,800	231,500	91.6%
2040	261,500	238,500	91.2%
2045	268,700	244,300	90.9%
2050	282,800	256,100	90.6%
2015-2050 chg	70,700	59,100	
15-50 CAGR*	0.8%	0.8%	

Source: ADE, Inc., based on DOF, California Public K-12 Graded Enrollment and High School Graduate Projections by County — 2015 Series and ADE population projections.

Taking into account population projections, household projections, vacant stock, and other factors such as healthy vacancy rates and residential replacement units, we project a need for 129,180 new residential units over the 35-year 2015 to 2050 period. Based on previous five years-worth of building permits data for each city in Fresno County and California DOF E5 reports, we estimate that, of the 129,180 required units, 98,110 (75.9 percent) will be single-family units, with the balance of 31,070 (24.0 percent) as multi-family (Table 15).

EMPLOYMENT PROJECTIONS

Total jobs in Fresno County are projected to increase by 133,900 jobs, from 372,400 in 2015 to 506,300 in 2050. This reflects a 0.9 percent compound annual growth rate (CAGR) over the entire period, but as shown at the bottom of Table 16, the growth rates are higher in the early years and are lower further into the future. Health care shows the highest growth rate, followed by non-manufacturing industrial sectors, retail, and education. Office and Hospitality jobs grow faster on average than total employment. Despite anticipated growth in certain food processing and durable manufacturing sectors, overall growth in manufacturing is flat during most of the projection period and begins to decline slightly after 2035. Agriculture jobs grow in the early years but then stabilize after 2045. Please see the Methodology Chapter for discussion of the economic trends affecting these projections.

Table 15 - New Units Required Over 35-Year 2015-2050 Period by Unit Building Type

JURISDICTION	NEW UNITS REQUIRED 2015-2050	SFU	MFU
Fresno County	129,180	98,110	31,070
Clovis SOI	18,770	13,800	4,970
Coalinga SOI	990	300	690
Firebaugh SOI	690	500	190
Fowler SOI	1,120	800	320
Fresno SOI	89,400	69,400	20,000
Huron SOI	240	100	140
Kerman SOI	1,460	500	960
Kingsburg SOI	1,640	1,500	140
Mendota SOI	810	500	310
Orange Cove SOI	110	100	10
Parlier SOI	870	600	270
Reedley SOI	2,210	600	1,610
Sanger SOI	2,160	1,700	460
San Joaquin SOI	310	200	110
Selma SOI	2,190	1,800	390
Uninc. excl. SOIs	6,200	5,700	500

Source: ADE, based on US Census Construction Building Permits database (2010-2015) and Calif. DOF E5.

Table 16 – Fresno County Employment Projections by Sector, 2015-2050

JOB SECTOR	2015	2020	2025	2030	2035	2040	2045	2050	CAGR
Agriculture	47,500	48,000	48,500	49,400	50,000	50,400	50,500	50,400	0.2%
Mfg./Mining	26,000	26,000	26,000	26,000	26,000	25,800	25,600	25,400	-0.1%
Other Industrial	52,200	56,500	60,400	64,000	67,700	71,300	74,300	77,500	1.1%
Retail	36,100	40,750	42,200	44,400	46,900	49,000	50,800	52,800	1.1%
Office	46,000	49,600	53,600	56,400	58,800	61,200	63,300	65,200	1.0%
Education	40,000	42,200	44,500	47,100	51,000	53,600	55,800	58,200	1.1%
Health Services	59,000	66,300	74,500	78,100	81,500	85,000	88,600	92,300	1.3%
Hospitality	32,700	35,400	38,500	41,400	43,500	44,800	45,700	46,500	1.0%
Government	32,900	33,300	33,800	34,400	34,700	35,700	36,700	38,000	0.4%
Total	372,400	398,050	422,000	441,200	460,100	476,800	491,300	506,300	0.9%
Total CAGR		1.3%	1.2%	0.9%	0.8%	0.7%	0.6%	0.6%	

Source: ADE Inc. (note: CAGR = compound annual growth rate)

Table 17 shows the total jobs projections for the Spheres of Influence (SOI) for each of the cities plus the unincorporated county area. As discussed further in the Methodology Chapter below, the city projections reflect recent trends in the share of basic sector employment for each of the cities plus future projected population growth that affects local-serving sectors such as retail, education and government jobs. It is anticipated that the metropolitan area of the county will continue to see the bulk of job growth and both Clovis and Fresno will increase their shares of county employment over the course of the projection period. However, the projections also reflect current development projects in each of the smaller cities as well. The last chapter of the report provides historical employment trends for each of the cities plus detailed job projections by industry.

Table 17 - ADE Employment Projections by City, 2015-2050

Jurisdiction	2015	2020	2025	2030	2035	2040	2045	2050	2015 Dstrbtn	2050 Dstrbtn
County	372,400	398,100	422,000	441,200	460,100	476,800	491,300	506,300	100.0%	100.0%
Clovis	32,400	34,680	36,640	38,560	40,460	42,270	43,970	45,740	8.7%	9.0%
Coalinga	2,820	3,050	3,160	3,290	3,420	3,540	3,660	3,780	0.8%	0.7%
Firebaugh	1,140	1,260	1,280	1,340	1,410	1,470	1,520	1,580	0.3%	0.3%
Fowler	2,400	2,770	2,890	3,030	3,170	3,300	3,420	3,540	0.6%	0.7%
Fresno	231,560	248,500	266,150	278,370	291,470	303,650	314,730	326,450	62.2%	64.5%
Huron	730	840	840	860	870	890	900	910	0.2%	0.2%
Kerman	2,680	2,890	3,130	3,290	3,440	3,580	3,720	3,860	0.7%	0.8%
Kingsburg	3,540	3,970	4,190	4,390	4,600	4,790	4,960	5,150	1.0%	1.0%
Mendota	890	900	910	950	990	1,030	1,060	1,100	0.2%	0.2%
Orange Cove	540	630	660	670	690	700	710	720	0.1%	0.1%
Parlier	2,230	2,380	2,530	2,630	2,720	2,810	2,890	2,970	0.6%	0.6%
Reedley	5,770	7,010	7,570	7,940	8,310	8,660	8,990	9,330	1.5%	1.8%
Sanger SOI	5,490	5,940	6,260	6,520	6,770	7,010	7,220	7,450	1.5%	1.5%
San Joaquin SOI	500	520	560	590	610	640	660	690	0.1%	0.1%
Selma	5,550	6,330	6,620	6,920	7,210	7,460	7,680	7,910	1.5%	1.6%
Incorporated	298,240	321,670	343,390	359,350	376,140	391,800	406,090	421,180	80.1%	83.2%
Balance	74,160	76,380	78,610	81,840	83,970	85,010	85,210	85,120	19.9%	16.8%

Source: ADE

METHODOLOGY

The study process began by developing a range of total population and employment projections for the county as a whole, reflecting varying assumptions about Fresno County's future share of regional growth as well as trends in industry growth. The employment projection methodology used an economic base approach, forecasting export industry sectors, while local serving business sectors follow growth in the economic base and in the population.

ADE consulted a variety of data sources on employment, population and demographic data. A brief description of these sources is provided below.

CA Employment Development Department (EDD). Data includes historical labor force and wage and salary jobs by industry from 1990 to 2015 actual from the Census of Employment and Wages (CEW) and 2012 to 2022 projected. ADE used the 2015 figures as the baseline for our employment projections and extrapolated the projections to the 2015 to 2025 time frame to align with other projection data.

CA Department of Finance (DOF). ADE used the 2015 total population estimate as the baseline for the population projections. DOF provides population projections in five year increments from 2010 to the year 2060, including age cohort, gender and race/ethnicity. DOF also provides data on birth and death rates and net migration through the year 2023. The fertility and mortality rates are estimated by the CA Department of Health.

The California Economic Forecast (Caltrans). Caltrans has commissioned Dr. Mark Schneipp at the California Economic Forecast to produce projections for the state and all 58 counties. The projections published in 2015 extend to 2040 and provide a wide range of indicators including employment by major industry group, population, housing and economic output.

Wood and Poole (W&P). W&P is an independent economic forecasting firm who provides projections for all counties in the US based on an econometric model that forecasts US economic conditions and creates state, regional and county forecasts based on changing conditions. The 2016 projections were just released in April 2016 and extend to 2050, including population, employment by major industry and a number of other indicators. W&P uses the US Bureau of Economic Analysis (BEA) definition of employment which includes self-employed and other non-employer jobs. The job figures therefore are always higher than wage and salary employment but the growth rates provide a good projected economic growth in the county.

Economic Modeling Specialists Institute (EMSI). A private data vendor that uses EDD data but provides estimates of current employment without the time lag from EDD data releases, and also at a much greater level of industry detail. EMSI provides projections for the 2015 to 2015 period as well as detailed occupational demand projections. The EMSI employment projections are very similar to the most recent EDD projections for Fresno County.

IMPLAN Input-Output Model. IMPLAN provides I-O models for all counties and down to the zip code level. The model provides employment, output and labor income multipliers for more than 500 industry categories.

California Department of Public Health. An important input into the population cohort survival model we developed to project future population was data birth- and death-rate data by race, gender, and age. Since the state of the economy influences births and birth rates, we generated race- and age-specific birth rates based on birth data covering nine years (2001-2009), particularly to control for possible effects of the Great Recession on the number of births in and birth rates for 2008 and 2009. In generating age-, gender-, and race-specific death rates, we again use detailed morbidity data from California Department of Public Health. With regard to race, we devised death-rates for eight racial\ethnic categories that correspond to the eight racial categories for which we gathered 2010 US Census Decennial 2010 city-level population data (Hispanic, White-Not Hispanic, Asian-Not Hispanic, Black-Not Hispanic, Native American-Not Hispanic, Pacific islander-Not Hispanic, Two-or-More-Not Hispanic, and Other-Not Hispanic). Our birth data was similarly organized with regard to race\ethnicity.

Public Use Micro Data (PUMS). PUMS provides the raw responses to the census surveys collected through the American Community Survey (ACS). ADE used the 3-year 2012-2014 data sample for Fresno County to run crosstabs of demographic, housing and income data by employment sector. The total figures shown in the tables in the report correspond to the total labor force data published in the ACS.

COUNTYWIDE EMPLOYMENT PROJECTIONS

In preparing the initial draft projections ADE sought to identify the range of potential population and employment growth levels based on state and regional economic trends. For both population and employment, the Caltrans projections allocate the lowest level of growth to Fresno County. Although the Caltrans statewide population figure for 2040 is higher than the DOF figure, the Caltrans projections for both SJV and Fresno County are lower. The DOF projections represent the high end of the population growth spectrum, mainly due to higher growth rates over the next ten years. After 2025 the DOF population growth rates are very similar to those from W&P. To construct the population projections, ADE began with the 2015 DOF population estimate, which is about 9,000 people lower than DOF's projection series had estimated, and then applied the annual growth rates for both Caltrans and DOF to create a low and a high projection trend.

For employment, the state Employment Development Department (EDD) projections show more substantial growth in the short term, while W&P projects higher growth rates than Caltrans beyond 2020. The ADE employment projections were constructed in several steps. We first analyzed projected employment growth in the economic base sectors for Fresno County, which include farm jobs and agricultural services, natural resources and mining, manufacturing, which is mainly food processing but also includes some durable goods manufacturing, and the logistics sectors of transportation, warehousing and wholesale. Tables 18 and 19 show the EDD and Caltrans projections for these sectors. ADE began with the EDD 2015 Census of Employment and Wages (CEW) figures as the

baseline and applied the growth rates from the EDD and Caltrans projections shown above in Table 2. Subsequently, as discussed below for the city-level projections, ADE calibrated the base year 2014 employment figures to the COG GIS estimates, which are slightly higher than the EDD figures.

The high projections mainly reflected higher growth rates in agriculture related employment, including agricultural services and in distribution sectors (transportation, warehousing, wholesale). However, the low projections actually have higher growth in the non-durable manufacturing sector, which is food processing. Each of these trends has some validity, based on research ADE has conducted for the regional Workforce Investment Boards. While farm labor is declining, agricultural services jobs are increasing, even beyond farm labor contracting. These trends are due to worsening labor economics in the farm sector, leading to continuing increased mechanization in agricultural production. However with the increased mechanization, comes increased demand for more skilled labor to maintain and operate the machines and also to provide specialized crop services. In the food processing sector, continued consumer demand is driving growth in a number of sectors, particularly poultry, cheese and dairy products, and nuts. However, other manufacturing sectors are showing declines, leading to flat net growth in manufacturing.

Table 18 - Employment Development Department Economic Base Job Estimates and Projections

Industry	2000	2005	2010	2015	2020	2025
Total Farm	55,600	46,400	46,000	47,300	52,052	55,294
Mining and Logging	400	200	200	300	235	181
Durable Goods	12,300	10,300	8,000	8,300	8,300	8,501
Nondurable Goods	15,300	16,800	16,100	17,200	18,298	19,705
Transportation, Warehousing	7,600	7,800	9,000	10,000	10,600	11,200
Wholesale Trade	12,200	12,700	11,500	13,800	13,658	13,846
Total Economic Base	103,400	94,200	90,800	96,900	103,143	108,727

Source: California Employment Development Department, extrapolated by ADE from the 2012-2022 projections.

Table 19 – Caltrans Estimates and Projections of Fresno County Economic Base Industries

Industry	2000	2005	2010	2015	2020	2025	2030	2035	2040
Farm	55,580	46,380	46,010	48,629	50,518	50,841	51,096	51,348	51,601
Natural Resources and Mining	360	200	200	303	323	298	298	302	306
Durable Manufacturing	12,330	10,330	8,030	7,972	8,127	8,360	8,569	8,750	8,897
Non-Durable Manufacturing	15,270	16,850	16,100	15,811	16,081	16,321	16,570	16,805	17,025
Trans, Warehousing, Util	9,060	9,410	10,830	12,120	13,112	14,105	15,061	16,027	17,021
Wholesale Trade	12,160	12,660	11,510	14,148	14,508	14,636	14,768	14,903	15,041
Total Economic Base	104,760	95,830	92,680	98,982	102,669	104,562	106,362	108,136	109,891

Source: Caltrans

ADE projected local-serving employment sectors in two stages. In the first stage, we obtained business to business employment multipliers from the IMPLAN input-output model for Fresno County. These “indirect” multipliers provided data on demand for local serving goods and services by the basic employment sectors. Secondly, ADE developed a set of population based multipliers to generate business employment from residential demand. ADE reviewed 25 years of history from the EDD dataset to capture trends in population related demand for service sectors. Interestingly, there is a trend toward fewer jobs in the retail and other local-serving sectors, due to increased business consolidation, increasing scale in stores and increased internet sales. For health care, ADE used the recent projection from Economic Modeling Specialists Institute (EMSI), which captures the changing nature of health care delivery and the increasing demand from the aging baby boomer demographic.

Following review of the initial range of projections by the Technical Advisory Committee, the study team reached out to each of the city and county jurisdictions to review local planning policies and growth projections based on existing general plans and other plans. In addition, most jurisdictions provided information about projects currently planned or under construction. This provided the basis for determining the most likely growth trajectory for the county in the short to medium time frames. The most recent city general plans (Clovis and Fresno) extend to 2035.

NOTES ON REGIONAL COMMUTE PATTERNS

In order to more fully account for potential job growth factors, ADE analyzed the regional commute patterns and the degree to which Fresno County jobs are held by workers from outside of the county. In general, Fresno County has a very high proportion of local workers filling jobs within the county, with over 91 percent of the local labor force working at jobs inside Fresno County (Table 20). In addition, the total jobs (361,500 positions in 2014) match very closely with the size of the labor force (365,305 workers aged 16 years and over).^{1 2} In 2014, about 39,515 jobs in Fresno County were held by workers commuting in from the surrounding region. The counties with the largest number of in-commuters were Madera and Tulare counties, each of which had over 10,000 workers commute into Fresno County.

The commute pattern data came from a variety of different sources. The estimated number of workers in the Fresno County labor force (and surrounding counties) came from the Census Bureau’s American Community Survey (ACS), 2010-2014 five-year sample data. The ACS data also identified the number of workers that worked inside of the county of residence. The 2010-2014 ACS data showed a total of 321,984 workers that both lived and worked in Fresno County.

While the ACS data focuses on the labor force, the total job count came from the California Employment Development Department (EDD), Labor Market Information Division (LMID). The total in-commute into Fresno County was estimated by subtracting the total jobs from the total number of Fresno County residents that also worked in the county.

¹ Job count comes from the California Employment Development Department, Labor Market Information Division.

² Labor force data comes from the Census Bureau, American Community Survey, 2006-2010 and 2010-2014 five-year sample.

In order to identify where the in-commuters came from, the analysis used the Inflow-Outflow data from the U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD) database. For each of the counties surrounding Fresno County, in addition to San Joaquin and Stanislaus counties, ADE identified the percentage of out-commuting workers in the LEHD database that commute to Fresno County. This percentage was applied to the total number of workers that work outside of each surrounding county, as identified in the ACS labor force data.

Table 20 – Regional Commute Patterns: 2010 and 2014

2010 - Data Source and Indicator	Fresno	Kern	Kings	Madera	Merced	Monterey	San Benito	San Joaquin	Stanislaus	Tulare
ACS Workers 16 years and over	351,673	304,506	56,356	46,267	91,438	176,845	23,907	262,119	201,003	161,697
ACS Percent Working in County of Residence	92.4%	92.7%	79.8%	66.6%	74.9%	89.6%	51.1%	73.9%	78.1%	86.9%
ACS Workers Working in County of Residence	324,946	282,277	44,972	30,814	68,487	158,453	12,216	193,706	156,983	140,515
ACS Workers Working Outside County of Residence	26,727	22,229	11,384	15,453	22,951	18,392	11,691	68,413	44,020	21,182
ACS Calculated Workers Working in Fresno County		1,277	3,513	7,307	2,253	691	280	1,492	1,792	5,468
LEHD Workers Working in Fresno County	234,356	4,626	6,719	11,527	4,067	1,743	296	2,501	3,129	13,659
LEHD Percent of Out commuters Working in Fresno County		5.7%	30.9%	47.3%	9.8%	3.8%	2.4%	2.2%	4.1%	25.8%
LEHD Total All Jobs		266,286	43,529	44,521	80,921	144,765	19,422	233,190	177,638	145,621
LEHD Workers Working in County of Residence		185,787	21,755	20,143	39,489	98,363	7,050	118,483	100,777	92,705
LEHD Out commute		80,499	21,774	24,378	41,432	46,402	12,372	114,707	76,861	52,916
EDD Total Jobs	336,600									
EDD Jobs Held by Workers Outside Fresno County	11,654	618	1,701	3,538	1,091	334	135	722	868	2,647
2014 - Data Source and Indicator	Fresno	Kern	Kings	Madera	Merced	Monterey	San Benito	San Joaquin	Stanislaus	Tulare
ACS Workers 16 years and over	352,667	312,996	53,699	42,533	92,426	177,092	24,447	266,476	199,368	165,479
ACS Percent Working in County of Residence	91.3%	93.9%	77.3%	68.9%	73.7%	88.7%	49.0%	73.1%	77.5%	85.3%
ACS Workers Working in County of Residence	321,985	293,903	41,509	29,305	68,118	157,081	11,979	194,794	154,510	141,154
ACS Workers Working Outside County of Residence	30,682	19,093	12,190	13,228	24,308	20,011	12,468	71,682	44,858	24,325
ACS Calculated Workers Working in Fresno County		1,124	3,608	6,161	2,302	768	323	1,362	1,694	6,937
LEHD Workers Working in Fresno County	243,014	4,787	7,341	13,111	4,437	2,041	362	2,502	3,230	15,874
LEHD Percent of Out commuters Working in Fresno County		5.9%	29.6%	46.6%	9.5%	3.8%	2.6%	1.9%	3.8%	28.5%
LEHD Total All Jobs	343,773	288,501	46,313	49,526	88,408	156,639	21,570	257,794	192,245	151,054
LEHD Workers Working in County of Residence		207,173	21,512	21,377	41,563	103,461	7,618	126,074	106,730	95,389
LEHD Out commute		81,328	24,801	28,149	46,845	53,178	13,952	131,720	85,515	55,665
EDD Total Jobs	361,500									
EDD Jobs Held by Workers Outside Fresno County	39,515	1,829	5,872	10,027	3,747	1,250	526	2,216	2,758	11,290

Source: American Community Survey, CA Employment Development Department, Longitudinal Employer Household Dynamics.

Notes: ACS data for 2010 is based on the 2006-2010 five-year sample, while the 2014 data is based on the 2010-2014 five-year sample.

COUNTYWIDE AND CITY-LEVEL POPULATION PROJECTIONS

This section of the report presents our findings with regard to city- and county-level population projections. We begin first by discussing the model we developed to project population in Fresno County. Then, we present our findings with regard to each city's population projections to the year 2050, including the number of new housing units needed to support future population increases.

POPULATION COHORT SURVIVAL MODEL

The City population and household projections are derived via a population cohort survival model developed by Applied Development Economics. ADE began the model by first obtaining Decennial 2010 Census total population data for each city in Fresno County and for the County as a whole. Specifically, we utilized 2010 Census "PCT 12H" through "PCT 12O," which identifies persons by age, gender, and race-and-ethnicity.³ As we were seeking to track population trends and projections at the city and Sphere of Influence (SOI) levels, we adjusted each city's Census 2010 data to account for their respective SOI, making sure to reduce 2010 population estimates for unincorporated Fresno County in a corresponding manner. We then applied age- and race-adjusted birth-rate and death rate factors to project the 2010 Census data forward to 2015, in an effort to estimate the natural change in population from 2010 to 2015. We further compared the 2015 natural change population to California DOF "E5" 2015 city and county population estimates, attributing city- and County-level differences between the two data sets to in-migration or, as the case may be, out-migration. The 2015 natural change population for each city and SOI was then adjusted to the DOF 2015 population estimate (which was also SOI-adjusted), meaning that persons by specific age, race-ethnicity, and gender categories in the 2015 natural change output were adjusted on a pro-rata basis with the DOF city-SOI 2015 estimate.

We then applied the population cohort survival method to the 2015 data for each subsequent year out to 2050. The city and SOI-level natural change population, along with the 2020 natural change population for the unincorporated areas excluding SOIs, was summed and that sum was then compared to a county-wide 2020 total population projection obtained separately. Outside of the population cohort survival method, ADE arrived at the overall County-level 2020 population projection by growing the DOF's 2015 "E5" Fresno County population estimate in accordance with Fresno County-specific growth rates (2015-2020) obtained from another DOF data series ("P3") on population projections. ADE attributed the difference between its 2020 natural change County-level projection and the DOF 2020 P3-based County-level projection to either in-migration or out-migration (as the case warrants), and applied the County-level migration rates to each cities' 2020 natural change

³Using the "PCT12" data series from the US Census Decennial 2010 population count, we were able to separate persons by over 100 age categories (i.e. "1", "2", "3",...) and, most importantly, by eight mutually-exclusive racial\ethnic categories. These are: "Hispanic", "White-Not Hispanic", "Black-Not Hispanic", "Asian-Not Hispanic", "Pacific Islander-Not Hispanic", "Native American-Not Hispanic", "Other-Not Hispanic," and "Two or More-Not Hispanic."

population, so that the sum of the cities (and SOIs), along with the unincorporated area, equals ADE's County-level P3-based projection. City total population figures were also adjusted to reflect historical growth between 2002 and 2014 as well as the long term development capacity from the general plans. ADE then continued projecting each city's total population in the manner described here for each succeeding year to 2050.

Having established baseline total population estimates and projections for each city-and-SOI and for unincorporated Fresno County (excluding SOIs), ADE then adjusted the total population in an effort to track persons in households. To this end, ADE utilized persons in household and group quarters estimates and projections issued by the California DOF for Fresno County for the years 2015 through 2030. Once ADE projected number of persons in households for each area, we then obtained Fresno County-specific current and future persons-per-household estimates generated by three separate sources (i.e. Woods and Poole, US Census American Community Survey, and California Department of Finance), dividing the total number of persons in households by current and future average household sizes to project the number of future households for each city-SOI area and unincorporated Fresno County. Taking into account existing stock of vacant units in each city (as reported in the California DOF E5 data series), city-specific healthy vacancy rates, and a uniform housing unit replacement factor of 0.58 percent, we then converted the projected number of households into housing units needed by each city between 2015 and 2050, to accommodate projected household growth over the same period.

CITY-LEVEL POPULATION PROJECTIONS

There are currently 972,300 people in Fresno County, according to the California DOF. We project Fresno County's to grow to 1,447,100 persons in the year 2050 (Table 20). In other words, the County will grow by 474,900 persons over the next 35 years, for annual growth rate of 1.1 percent. At 574,600, the City of Fresno and its SOI (Fresno SOI) contains 59.1 percent of the county's population, with the share projected to increase slightly to 60.6 percent in 2050. In terms of sheer numbers, the Fresno SOI is expected to grow by 329,200 people over the 35-year 2015-2050 period. Clovis SOI is projected to add 62,440 persons over the 2015-2050 period, based on this area's demographic attributes that influence birth rates and death rates, as well as anticipated migration patterns. There are 114,800 persons in the Clovis SOI right now, which is projected to increase to 177,210 by 2050 (Table 21). We project the number of households in the County as a whole to grow to 424,480 in 2050, up by 125,030 between 2015 and 2050 (Table 22). Currently, there are 299,300 households in the County, with the bulk of households at 181,800 (60.7 percent) in the Fresno SOI area.

Table 21 – Projection of Total Population: Fresno County and Local Jurisdictions: 2015 – 2050

JURISDICTION	2015	2020	2025	2030	2035	2040	2045	2050	15-50 Change	15-50 CAGR*
Fresno County	972,300	1,047,440	1,122,840	1,191,850	1,258,860	1,323,070	1,383,690	1,447,090	474,790	1.1%
Clovis SOI	114,770	126,850	136,350	145,050	153,490	161,580	169,220	177,210	62,440	1.2%
Coalinga SOI	16,530	17,350	18,170	18,920	19,650	20,350	21,010	21,700	5,170	0.8%
Firebaugh SOI	7,780	8,370	8,880	9,340	9,790	10,220	10,630	11,060	3,280	1.0%
Fowler SOI	6,580	7,240	7,890	8,490	9,070	9,630	10,160	10,710	4,130	1.4%
Fresno SOI	574,590	624,040	676,820	725,120	772,030	816,980	859,410	903,790	329,200	1.3%
Huron SOI	6,820	7,430	7,600	7,750	7,900	8,050	8,180	8,330	1,510	0.6%
Kerman SOI	14,880	15,900	16,930	17,860	18,770	19,650	20,470	21,330	6,450	1.0%
Kingsburg SOI	12,750	13,670	14,590	15,440	16,260	17,050	17,790	18,570	5,830	1.1%
Mendota SOI	11,210	11,920	12,630	13,280	13,920	14,520	15,090	15,690	4,480	1.0%
Orange Cove SOI	9,360	9,540	9,710	9,880	10,030	10,190	10,330	10,480	1,120	0.3%
Parlier SOI	15,100	15,870	16,640	17,350	18,040	18,700	19,330	19,980	4,880	0.8%
Reedley SOI	25,570	27,150	28,740	30,200	31,610	32,960	34,240	35,580	10,010	0.9%
Sanger SOI	26,310	27,860	29,410	30,840	32,220	33,540	34,790	36,100	9,780	0.9%
San Joaquin SOI	4,040	4,310	4,580	4,830	5,070	5,310	5,520	5,750	1,710	1.0%
Selma SOI	26,680	28,250	29,810	31,250	32,640	33,980	35,240	36,550	9,870	0.9%
Uninc. exc. SOIs	99,330	101,710	104,080	106,250	108,350	110,370	112,280	114,270	14,940	0.4%

Source: ADE

Table 22 – ADE Projections of Households

Jurisdiction	2015	2020	2025	2030	2035	2040	2045	2050	15-50 Change	15-50 CAGR*
Fresno County	299,450	328,300	348,120	362,860	375,290	388,930	405,260	424,480	125,030	1.0%
Clovis SOI	40,660	45,140	47,970	50,090	51,880	53,830	56,150	58,870	18,210	1.1%
Coalinga SOI	4,000	4,270	4,400	4,480	4,570	4,670	4,800	4,960	960	0.6%
Firebaugh SOI	2,000	2,170	2,270	2,350	2,410	2,480	2,570	2,670	670	0.8%
Fowler SOI	2,060	2,280	2,460	2,600	2,720	2,840	2,980	3,150	1,090	1.2%
Fresno SOI	181,830	198,420	212,740	223,700	233,120	243,160	254,770	268,260	86,420	1.1%
Huron SOI	1,570	1,710	1,730	1,740	1,730	1,740	1,760	1,790	230	0.4%
Kerman SOI	4,110	4,410	4,640	4,810	4,950	5,100	5,300	5,530	1,410	0.9%
Kingsburg SOI	4,340	4,670	4,930	5,120	5,280	5,460	5,670	5,930	1,590	0.9%
Mendota SOI	2,500	2,670	2,800	2,890	2,960	3,040	3,150	3,280	780	0.8%
Orange Cove SOI	2,160	2,210	2,230	2,220	2,210	2,210	2,230	2,270	110	0.1%
Parlier SOI	3,480	3,670	3,810	3,900	3,970	4,050	4,170	4,320	840	0.6%
Reedley SOI	7,020	7,490	7,840	8,080	8,280	8,510	8,810	9,160	2,140	0.8%
Sanger SOI	7,320	7,780	8,120	8,360	8,550	8,770	9,060	9,410	2,100	0.7%
San Joaquin SOI	900	970	1,020	1,050	1,080	1,110	1,160	1,200	300	0.8%
Selma SOI	7,470	7,950	8,290	8,530	8,720	8,950	9,240	9,600	2,130	0.7%
Uninc. excl. SOIs	28,000	32,480	32,860	32,930	32,860	33,000	33,430	34,070	6,060	0.6%

Source: ADE

PROJECTING HOUSING UNITS BASED ON HOUSEHOLD PROJECTIONS, VACANT STOCK, AND VACANCY RATES

In conducting the analysis of housing demand, we used both vacancy rates and replacement unit rates to project the total number of future units, not just the units needed to accommodate projected households. In preparing the table below, we created city-specific weighted average healthy vacancy rates that we then applied to each city's household projections. We utilized standard benchmarks for healthy vacancy rates (i.e. 1.5 percent for owner occupied units and 4.0 percent for rent-occupied units), then, using each city's census-based homeownership and rentership rates, we then generated each city's overall weighted average healthy vacancy rate. In addition, we employed a replacement factor of 0.58 percent. Finally, we took into account vacant stock already in place in the year 2015, assuming that increases in new households would generally first occupy vacant units. In several communities there were considerable amount of vacant stock in 2015 as a result of the Great Recession. However, despite high vacancy rates, a number of cities are processing applications for new housing development, as shown in Table 26 below. Therefore, to account for this development activity, we phased the absorption of "excess" vacant units over a ten year period. Table 22 below shows our projections on a city-by-city basis, with projections presented as new housing unit increases over given time periods.

We also compare our findings against future housing units observed in other documents such as the Regional Housing Needs Allocation (RHNA) for Fresno County (Table 24). For example, the City of Clovis RHNA allocation is 6,300. At the rate Clovis SOI is growing – and given its existing vacant stock and healthy vacancy rate – it will take this area 12 years (2027) to absorb the 6,300 allocation. In Table 24, we include estimates for how long it will take cities in Fresno County to absorb their respective RHNA allocation.

We also compare our projections against city-level data on development capacity of vacant sites in cities across Fresno County (Table 25). Reedley, for example, can build an estimated 1,667 units on vacant lots in the city. Assuming any new housing units are built first on vacant lots within the city, at the rate Reedley is growing, it will take another 21 years (2036) to fully build 1,667 units on the vacant lots within Reedley's city limits. In Table 26 we summarize projects that are already in the development pipeline in each city in Fresno County.

Table 23 – Projected Required New Housing Units Based on Projected Household Increases, Vacancy Rates, Vacant Stock, and Replacement Allowances: 2015-2050

Jurisdiction	Tot. Units	Required New Housing Units By Period							Increase In Households by Period						
	2015	15-20	15-25	15-30	15-35	15-40	15-45	15-50	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Fresno Co.	324,941	21,100	38,830	65,500	78,350	92,440	109,320	129,180	28,850	48,670	63,410	75,840	89,480	105,810	125,030
Clovis SOI	41,832	4,080	6,470	9,720	11,560	13,570	15,960	18,770	4,480	7,310	9,430	11,220	13,170	15,490	18,210
Coalinga SOI	4,353	90	300	490	590	680	820	990	270	400	480	570	670	800	960
Firebaugh SOI	2,135	100	150	350	420	490	580	690	170	270	350	410	480	570	670
Fowler SOI	2,153	180	330	550	670	800	950	1,120	220	400	540	660	780	920	1,090
Fresno SOI	195,429	13,360	24,380	43,300	53,040	63,410	75,420	89,370	16,590	30,910	41,870	51,290	61,330	72,940	86,430
Huron SOI	1,598	150	170	180	170	180	200	240	140	160	170	160	170	190	220
Kerman SOI	4,243	250	430	720	860	1,020	1,220	1,460	300	530	700	840	990	1,190	1,420
Kingsburg SOI	4,504	270	450	810	970	1,150	1,370	1,640	330	590	780	940	1,120	1,330	1,590
Mendota SOI	2,571	150	250	400	480	560	680	810	170	300	390	460	540	650	780
Orange Cv SOI	2,273	20	40	60	50	50	80	110	50	70	60	50	50	70	110
Parlier SOI	3,596	150	240	430	500	590	720	870	190	330	420	490	570	690	840
Reedley SOI	7,157	420	710	1,100	1,300	1,540	1,840	2,210	470	820	1,060	1,260	1,490	1,790	2,140
Sanger SOI	7,269	340	560	1,070	1,270	1,500	1,800	2,160	460	800	1,040	1,230	1,450	1,740	2,090
San J'quin SOI	976	50	90	150	180	220	260	310	70	120	150	180	210	260	300
Selma SOI	7,738	360	610	1,090	1,290	1,520	1,830	2,190	480	820	1,060	1,250	1,480	1,770	2,130
Uninc.	37,114	1,130	3,640	5,070	5,000	5,140	5,590	6,240	4,480	4,860	4,930	4,860	5,000	5,430	6,070

Table 24 – Number of Years to Fulfill RHNA Obligations via Future Housing Units Based on Household Projections

Jurisdiction	Total RHNA	Cumulative Change in Housing Units Beyond 2015							Number of Years To Absorb	Year
		15-20	15-25	15-30	15-35	15-40	15-45	15-50		
Fresno County	41,440	21,098	38,827	65,501	78,350	92,442	109,315	129,182	11	2026
Clovis SOI	6,328	4,080	6,468	9,722	11,560	13,572	15,964	18,771	12	2027
Coalinga SOI	589	87	301	491	587	685	821	990	21	2036
Firebaugh SOI	712	104	150	353	416	488	579	689	35+	2050+
Fowler SOI	524	184	330	549	672	801	950	1,121	16	2031
Fresno SOI	23,565	13,364	24,383	43,297	53,035	63,415	75,421	89,370	9	2024
Huron SOI	424	148	168	176	172	179	202	236	35+	2050+
Kerman SOI	909	251	430	722	864	1,024	1,223	1,461	22	2037
Kingsburg SOI	374	265	454	808	970	1,152	1,373	1,636	8	2023
Mendota SOI	554	147	250	401	477	564	675	809	24	2039
Orange Cove SOI	669	15	42	64	51	52	75	112	35+	2050+
Parlier SOI	558	149	238	434	504	594	716	867	23	2038
Reedley SOI	1,311	417	709	1,096	1,300	1,538	1,842	2,209	21	2036
Sanger SOI	1,218	342	556	1,075	1,269	1,499	1,799	2,162	19	2034
San Joaquin SOI	378	54	93	155	185	219	262	313	35+	2050+
Selma SOI	605	359	612	1,091	1,287	1,521	1,825	2,194	10	2025
Uninc., excl. SOIs	2,722	1,133	3,644	5,066	5,003	5,139	5,588	6,242	15	2030
Source: ADE										

Table 25 – Number of Years to Fulfill Development Potential of Vacant Sites via Future Housing Units Based on Household Projections

Jurisdiction	Within-City Housing Capacity	Cumulative Change in Housing Units Beyond 2015							Number of Years To Absorb	Year
		2015-2020	2015-2025	2015-2030	2015-2035	2015-2040	2015-2045	2015-2050		
Fresno County	61,916	21,098	38,827	65,501	78,350	92,442	109,315	129,182	17	2032
Clovis SOI	9,840	2,960	5,190	8,320	10,050	11,950	14,220	16,900	18	2033
Coalinga SOI	2,080	90	300	490	590	680	820	990	35+	2050+
Firebaugh SOI	712	170	300	570	700	840	990	1,170	35+	2050+
Fowler SOI	1,331	180	330	550	670	800	950	1,120	35+	2050+
Fresno SOI	139,555	14,400	25,410	44,300	54,020	64,390	76,390	90,340	35+	2050+
Huron SOI	2,253	40	60	70	70	80	100	140	35+	2050+
Kerman SOI	1,274	250	430	720	860	1,020	1,220	1,460	31	2046
Kingsburg SOI	1,215	270	450	810	970	1,150	1,370	1,640	26	2041
Mendota SOI	971	170	300	470	570	680	810	960	35+	2050+
Orange Cove SOI	na	20	40	60	50	50	80	110		
Parlier SOI	592	200	350	590	710	840	1,000	1,200	24	2039
Reedley SOI	1,667	290	450	730	830	980	1,180	1,450	26	2041
Sanger SOI	1,101	380	630	1,180	1,410	1,670	2,000	2,390	18	2033
San Joaquin SOI	410	50	90	150	180	220	260	310	35+	2050+
Selma SOI	1,533	370	630	1,120	1,320	1,560	1,870	2,240	24	2039
Uninc., excl. SOI	13,438	1,150	3,690	5,130	5,090	5,240	5,710	6,390	35+	2050+

Source: ADE, based on Fresno COG Excel file "FCOG_HE_Capacity_2016-07-20.xlsx" (Note: no data on development capacity of vacant lots in City of Fresno)

Table 26 – Residential Projects in the Development Pipeline by City

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI-FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Clovis				
1515 Escalon		10 Unit MFR	Approved	
Regal Dakota		144 Unit MFR	Approved 10/7/14	
Innovative Living		48 bed senior	Approved	
Ashwood		133 Unit MFR	Approved	
Land Value		216 Unit MFR	Approved	
32 Tract maps are summarized by project status below				
Under Construction	958			
Recorded	179			
Approved	1,119			
Applied	2,557			
Total:	4,813	551		
Coalinga				
Summer Glen Estates	417		Submitted, tentative map approved 9/1/2014	
Golf Course Development	869		Submitted, tentative map approved 5/6/2010	
Canyon Creek Estates	43		Approved 1/7/2010	
Promontory Point	44		Finished Lots That Are Available	
Warthan Meadows	351		March 5, 2005, Final Map 6/7/2007	
Total:	1,724			
Firebaugh				
Adam & Nagi Saleh		40	Project approved but not commenced	None at this time
Lake Joallan	122			
El Sendero Ranch	579			
Fresno County Housing		30	Permit Issued	12/31/2016

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI-FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Total:	701	70		
Fresno: The City provided data on 99 approved tract maps. These are summarized by expiration date below.				
	724		Expire 2017	
	5,985		Expire 2018	
	4,558		Expire 2019	
	829		Expire 2020	
Total:	12,096			
Fowler				
TTM 5292 - RJ Hill - APN 345-100-19s	171		Tentative Tract Map	2021
TTM 5834 - RJ Hill - APN 343-040-68	57		Final Map	2020
TTM 5834 Phase 2	75		Final Map	2023
TTM 5090 Phase 2	55		In construction	2017
TTM 5090 Phase 3	55		Final Map	2019
TTM 5623	53		Tentative Tract Map	2030
TTM 5785	57		Tentative Tract Map	2030
Site Plan Review 15-05		6	In construction	2017
Site Plan Review 15-01 Housing Authority		40	Site Plan Approved - LIHTC project by the Housing Authority - 60 units (includes removal of 20 existing units for a net increase of 40 units)	2019
Total:	523	46		
Huron				
Palmer Villas Apartments (phase 2)		57	Approved, permitted	Jan-17
APN 075-032-78S (Phase 2)	88		Approved, permitted	Jan-18
American Community Apartments		64	Approved 3/10/2016	Nov-17
Total:	88	121		
Kerman				
Tract 5928 Phase 1	19		Approved 7/7/2008	Unknown

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI- FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Tract 5928 Phase 2	131		Approved 7/7/2008	Unknown
Tract 5831	48		Approved 12/20/2006	Unknown
Infill-custom residential lot	1		Issued Building Permit	Estimated 2017
Gateway Villa Apartments		61	Approved 5/18/2016	Estimated 1-2 years
Tract 5636 (Bordeau II) (submitted P/C)	67		Approved 5/11/2006	Estimated 1-2 years
Tract 5832	106		Not recorded yet/map check	Estimated 1-2 years
Infill-custom residential lot (C st)	1		In Plan Check	Estimated 2017
Total:	373	61		
Kingsburg				
TM 5609 (Kings Crossing)	46		Permits Pulled	2017
TM 6094 (APN 39408001) (Lennar)	34		Construction Started	2017
TM 5073 (Ghuman)	39		Approved TM, Annexation expired	
TM 6141 (Gianetti)	47		Site Plan Review Initiated	
SPR 2016-02 1236 Marion Street (triplex)	3		Site Plan Review-Initiated	
SPR 2014-04 1235 Cardinal Lane		12	Under Construction	2016-17
SPR 2015-14 1200 Marion Street (Fourplex)		4	Site Plan Review-Approved	2017
SPR 2016-05, 6 units on two lots (triplex)		6	Site Plan Review-Approved	
SPR 2016-04 Senior Housing		48	Site Plan Review-Approved, seeking Tax Credit Funding	2018
West Star Construction	147	18	Allocations and SPR process underway	2017 and beyond
TM 6151 (Erickson)	94		Allocations only at this time	2017 and beyond
TM 6122 (Nelson)	60		Allocations only at this time	2017 and beyond
Total:	470	88		
Mendota				
VTTM No. 5483 Final Map (012-190-40 & 41)		200	Approved tentative map March 22, 2005	

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI-FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Ochoca Apartments		11	Approved December 10, 2013	
Total:		211		
Orange Cove				
Century/Builders - Monte Vista Estates	157		9 homes under construction - 17 vacant lots	09.01.17
Joe Serna Homes	47		2 homes under construction - 2 vacant lots	09.01.17
Total:	204			
Parlier				
Balance of Avila Site		18	A balance of 18 additional units could be constructed on site. The site has already been annexed into the City.	
Tentative Tract 6038		148	Approved by City on 4/16/2014. This site has already been annexed into the City.	
Tentative Tract Map 5615	169		Rezoning to R-1 approved by City in 2006. Annexation application was submitted and withdrawn due to market conditions.	
Tentative Tract Map 6041	5		This site is within City limits.	
Tentative Tract 5495	68		TTM 5495 was approved for 158 single family lots and TTM 5607 was approved for 133 single family lots. To date, an estimated 90 homes have been constructed in TTM 5495 and 50 homes on TTM 5607.	
Tentative Tract Map 5607	83			
Oak Grove		31	Project will submit for a LIHTC in March 2016 for review by the Tax Allocation Committee in June 2016. If successful, construction can begin in late 2016.	
Total:	325	197		
Reedley				
Reedley Family Apartments Phase 2		32	Approved on March 9, 2010.	

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI-FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Kings River Village - Residential Component	64	190	Approved by City Council on April 28, 2015; pending building permits	
Trailside Terrace - Residential Component	57	104	Under construction	2017
Total:	121	326		
Sanger				
Royal Wood	187		Approved 12/04	100 units remaining - 2017-2018
Sanger Crossing Phase 1		45	Approved 05/13	Has been completed
Sanger Crossing Phase 2		36	Approved 05/13	Waiting for Tax Credit approval
Memorial Village (Fresno Housing Authority)		46 (demo and rebuild 33 existing add 13 new)	Approved 06/16	2017-2018
Total:	187	127		
San Joaquin				
TTM 5645	305		Tentative Tract Map	
Total:	305			
Selma				
Bratton I	220		Approved	Unknown
Emmett	96		Application Submitted	Unknown
Canales	153		Under construction	40 units near completion 2nd phase starting
Shockley Terrace County Housing Authority		48	Approved	Under construction completion March 2017
Synergy	87		Approved	Unknown
Country View III	23		Approved project in the Planning Area	Unknown
Country Rose Estates	33		Approved project in the Planning Area	Unknown

PROJECT NAME	SINGLE-FAMILY UNITS	MULTI- FAMILY UNITS	STATUS	PROJECTED COMPLETION DATE
Casa Bella	33		Under annexation and Planning	Map 5361 Unknown
Selma Heritage	40		Under annexation and Planning	Map 5563 Unknown
Total:	685	48		

CITY-LEVEL EMPLOYMENT PROJECTIONS

The Fresno COG has developed detailed job estimates by Traffic Analysis Zone (TAZ) for 2014. These estimates are based on detailed files provided by EDD supplemented by business data provided by Info USA (Table 28). ADE used these data as the base year for the projection analysis. The data reflect mid-year job numbers for 2014 and therefore are slightly different than EDD's annual averages for the same year. Table 27 defines the detailed industry sectors that are grouped into the categories in Table 28.

In order to allocate the countywide employment projections to the cities and unincorporated area, ADE reviewed the historical trend data from the Longitudinal Employer-Household Dynamics (LEHD) data for each city and the county as a whole (Table 29).⁴ While this data source provides relatively detailed jobs data for local areas and census geography, it is fairly new and not yet fully calibrated to either the American Community Survey (ACS) worker data or the Bureau of Labor Statistics (BLS) jobs-in-place data. In 2002, the LEHD undercounted the EDD countywide total jobs by 17 percent; however, by 2014 this discrepancy had been reduced to 5 percent. Viewing the data sector by sector, certain industries accounted for nearly all the deviation: Agriculture, health care, education, government and other services. Based on the nature of these differences, ADE was able to calibrate the data to match EDD total jobs for the county in each year (Table 30). In addition, ADE estimated 2015 jobs for each city based on recent growth trends.

Our analysis indicates that while the County as a whole had a 1.4 percent growth rate in jobs between 2010 and 2014, Clovis had a higher rate at 2.5 percent while the City of Fresno had a slower rate of 1.3 percent per year (Table 31). Fresno had strong job growth prior to the recession but seems to have had a very sluggish recovery more recently. The unincorporated area had a relatively strong growth of 2.4 percent per year during this period due to sustained growth in the farm sector. Several of the smaller cities had substantial swings in employment both positive and negative.

Given the volatility of the city growth rates both before and after the recession, it is difficult to rely on those trends directly for the future projections. ADE took the approach that cities would maintain the broad trend of their share of total county employment. The formulas for future jobs growth by city account for the shifts in the share of total county employment between 2002 and 2014. However, for the unincorporated area, a separate jobs projection was done to reflect the overall county projection for change in farm employment. While farm jobs have continued to grow in recent years, future growth rates are projected to diminish due to several reasons including increasing mechanization driven by increasing labor costs. In contrast, given its available land supply for non-residential development, the City of Fresno is anticipated to accelerate jobs growth and regain its historical share of countywide jobs. Local serving jobs for all cities are projected based on their projected increase in population and the countywide ratios between population growth and local-serving job sector growth. Finally, most of the cities provided data on currently approved but unbuilt non-residential projects (Table 32). ADE estimated the jobs for these projects and allocated them to the early 2017-2020

⁴ This is cooperative data program with the Bureau of the Census and the Bureau of labor Statistics. Data may be obtained from www.OnTheMap.com.

period based on available information about the construction schedule for the projects. If no schedule was provided, the projects were allocated to the 2019-2020 period.

For the 2015-2020 period, the city projections are affected by the change in share of countywide growth between 2002 and 2014. Beyond 2025, the economic base projections for each city are influenced by the county share of employment each city is expected to have in 2025. The draft jobs projections are shown in five year increments in Table 17.

Table 27 – Industry Sectors by Land Use Category

AGRICULTURE, FORESTRY, FISHING AND HUNTING
MANUFACTURING / MINING
OTHER INDUSTRY
Utilities
Construction
Wholesale Trade
Transportation and Warehousing
Other Services (excluding Public Administration)
RETAIL TRADE
OFFICE
Information
Finance and Insurance
Real Estate and Rental and Leasing
Professional, Scientific, and Technical Services
Management of Companies and Enterprises
Administration & Support, Waste Management
EDUCATIONAL SERVICES
HEALTH CARE AND SOCIAL ASSISTANCE
HOSPITALITY
Arts, Entertainment, and Recreation
Accommodation and Food Services
GOVERNMENT

Source: Fresno COG

Table 28 – Jobs by Jurisdiction SOI and Sector, 2014

SOI	Education	Hospitality	Government	Other Industry	Health care	Office	Retail	Mfg./Mining	Agriculture	Total
Clovis	3,019	4,571	810	4,022	4,825	3,400	5,891	3,351	344	30,233
Coalinga	968	319	319	155	334	177	290	28	76	2,666
Firebaugh	236	71	46	434	102	51	85	16	113	1,154
Fowler	252	118	28	527	157	139	159	554	175	2,110
Fresno	25,956	21,088	26,448	33,412	42,001	38,212	23,226	12,594	1,368	224,305
Huron	118	22	78	12	38	2	29	0	441	740
Kerman	388	243	169	238	326	312	501	162	92	2,431
Kingsburg	272	324	74	1,155	311	231	401	494	77	3,339
Mendota	161	92	44	97	189	14	136	1	157	891
Orange Cove	152	1	54	46	184	19	56	8	23	543
Parlier	718	92	123	272	326	49	150	371	67	2,168
Reedley	1,267	434	217	1,025	1,469	278	595	254	84	5,624
Sanger	920	376	438	615	739	147	710	644	453	5,041
San Joaquin	297	5	62	26	7	5	10	0	75	488
Selma	599	963	188	712	516	367	1,436	414	350	5,545
Unincorporated	2,851	3,154	3,301	7,710	3,597	2,252	1,316	5,640	45,204	75,025
TOTAL	38,176	31,873	32,399	50,458	55,121	45,655	34,991	24,531	49,099	362,303

Source: Fresno COG GIS

Table 29 - LEHD Base Data

JURISDICTION	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
County	286,830	292,388	299,874	308,293	310,553	319,358	320,871	310,683	324,568	324,450	320,437	336,297	343,773
Clovis	23,948	24,416	25,466	25,936	28,188	28,870	29,214	28,017	26,734	26,988	27,397	28,580	30,453
Coalinga	3,883	3,946	3,953	3,797	3,000	2,822	2,726	2,561	2,581	3,966	5,539	5,610	5,757
Firebaugh	1,813	1,794	1,678	1,257	1,147	906	1,021	986	1,319	1,337	1,281	1,195	1,111
Fowler	2,068	2,008	2,077	2,150	2,087	2,083	2,283	2,146	2,102	2,347	2,366	2,343	2,468
Fresno	177,945	181,866	185,508	190,173	194,332	197,093	198,360	193,733	203,101	197,040	198,015	207,285	210,383
Huron	986	968	1,065	974	951	786	782	2,225	1,667	1,228	419	447	579
Kerman	1,868	1,905	3,512	4,157	3,410	3,873	4,083	2,771	3,982	4,793	5,031	5,468	6,977
Kingsburg	3,953	4,619	4,691	4,435	4,721	4,610	4,471	4,428	4,220	4,477	4,412	4,545	4,878
Mendota	874	1,003	903	891	1,048	888	882	1,305	1,259	1,252	1,348	1,337	1,363
Orange Cove	1,043	1,209	1,240	1,009	1,049	888	1,031	926	838	828	774	778	607
Parlier	1,895	1,838	2,281	1,537	1,347	1,407	1,520	1,509	1,789	2,191	2,094	2,334	2,545
Reedley	6,361	6,398	6,158	7,046	7,362	7,677	8,133	7,924	8,011	8,384	7,312	7,793	7,830
Sanger	5,186	5,130	5,112	5,946	5,103	6,304	6,631	6,644	5,791	6,275	5,938	7,009	7,814
San Joaquin	375	340	359	345	484	397	358	165	446	617	767	769	990
Selma	5,694	5,704	5,787	6,188	5,596	6,023	6,029	5,496	5,638	4,959	4,674	5,159	5,104
Incorporated	237,892	243,144	249,790	255,841	259,825	264,627	267,524	260,836	269,478	266,682	267,367	280,652	288,859
Balance	48,938	49,244	50,084	52,452	50,728	54,731	53,347	49,847	55,090	57,768	53,070	55,645	54,914

Source: www.OnTheMap.com

Table 30 – Estimated Historical Growth Trends by Industry Sector – Fresno County 2002 - 2014

Industry Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2010-2014 CAGR
Agriculture	46,600	46,200	46,000	46,400	46,500	48,100	48,900	45,100	46,000	47,900	48,900	49,200	49,009	0.4%	1.6%
Mfg./Mining	27,309	27,188	27,763	27,307	27,799	28,216	27,188	25,429	24,223	23,954	23,891	23,300	24,531	-0.9%	0.3%
Other Industrial	51,303	51,543	53,141	54,378	56,675	57,726	53,876	47,488	44,550	46,562	48,007	50,712	50,458	-0.1%	3.2%
Retail	34,371	34,983	36,181	36,853	37,494	37,052	36,662	34,229	31,776	32,655	33,516	34,737	34,991	0.1%	2.4%
Office	40,096	40,757	41,374	43,705	44,996	44,814	44,896	41,359	40,518	39,125	39,943	42,595	45,768	1.1%	3.1%
Education	37,500	36,800	36,300	36,300	36,800	38,300	39,000	38,200	37,200	37,700	37,100	36,600	38,176	0.1%	0.6%
Health Services	37,300	39,000	41,200	42,400	43,200	44,700	46,300	46,900	46,700	46,900	48,000	50,700	55,121	3.3%	4.2%
Hospitality	26,316	25,926	25,886	26,973	29,399	30,047	29,085	28,068	28,392	30,381	29,746	30,848	31,873	1.6%	2.9%
Government	34,800	34,200	33,800	34,100	34,400	34,800	35,200	35,000	34,700	33,200	32,200	32,200	32,399	-0.6%	-1.7%
Total	335,594	336,596	341,644	348,417	357,263	363,754	361,105	341,772	334,059	338,376	341,304	350,892	362,326	0.6%	2.1%

Table 31 – Estimated Historical Employment Growth Trends by City SOI

Jurisdiction	2002	2015 (Est.)	2002 Share	2015 Share	2002- 2007 Change	2002- 2007 CAGR	2010- 2014 Change	2010- 2014 CAGR
County	335,594	371,800	100.0%	100.0%	28,160	1.4%	28,267	1.4%
Clovis	25,152	31,586	7.5%	8.5%	4,941	3.0%	4,221	2.5%
Coalinga	3,489	2,776	1.0%	0.7%	-1,014	-5.6%	662	4.9%
Firebaugh	1,726	1,154	0.5%	0.3%	-772	-9.4%	-142	-1.9%
Fowler	1,520	2,306	0.5%	0.6%	178	1.9%	635	6.2%
Fresno	209,504	230,433	62.4%	62.0%	18,927	1.5%	16,497	1.3%
Huron	1,194	882	0.4%	0.2%	-241	-3.7%	-1,328	-15.7%
Kerman	2,063	2,641	0.6%	0.7%	199	1.5%	592	4.8%
Kingsburg	3,723	3,494	1.1%	0.9%	2,597	9.2%	-2,800	-9.7%
Mendota	638	890	0.2%	0.2%	58	1.5%	44	0.9%
Orange Cove	661	543	0.2%	0.1%	61	1.5%	-233	-5.8%
Parlier	1,271	2,212	0.4%	0.6%	-112	-1.5%	700	6.7%
Reedley	4,935	5,722	1.5%	1.5%	648	2.1%	-250	-0.7%
Sanger	4,386	5,382	1.3%	1.4%	258	1.0%	1,034	3.9%
San Joaquin	191	487	0.1%	0.1%	-17	-1.6%	26	0.9%
Selma	6,693	5,545	2.0%	1.5%	699	1.7%	-1,518	-4.0%
Incorporated	267,146	296,052	79.6%	79.6%	26,408	1.6%	18,141	1.1%
Balance	68,447	75,616	20.4%	20.3%	1,752	0.4%	10,126	2.4%

Source: ADE

Note: CAGR = Compound Annual Growth Rate.

Table 32 – Non-Residential Projects in the Development Pipeline by City

Project Name	Type	Square Footage	Status	Projected Completion Date	Estimated Jobs
Clovis					
Civic Center North	Senior Center, Transit, Health Clinic and County Library Phase C (Bed Tower, and Expansion)		Applied		10
CCMC			Approved SPR		500
Black Bear	Restaurant		Approved SPR		65
All Tech	Auto Repair Facility		Approved SPR		10
Peloton	Construction office	9,000	Approved SPR		20
Falls	Event center	17,000	Approved SPR		10
DDYS	Specialty medical	10,800	Approved SPR		35
Townplace	114 Room Hotel		Approved SPR		35
Stock Five	Office/retail	11,000	Approved SPR		5
Budget Blinds	Industrial	4,000	Approved SPR		5
Herndon Temperance	Medical Office	18,600	Pending SPR approval		65
Lucido	Retail	6,000	Pending SPR Approval		45
Bond	Professional office	6,200	Pending SPR Approval		15
Taylor	Professional office	4,600	Pending SPR Approval		15
Choppin Block	Industrial Auto	11,500	Under Construction		5
CCMC	Cancer Center	97,000	Under Construction		400
Centennial Plaza North	Retail/office	14,400	Under Construction		40
Peterson Centennial South	Retail/office	24,000	Under Construction		60
Beal	Conv. Store Fule Sales		Under Construction		10
Thomason	Retail	20,000	Under Construction		100
CHSU	Office/school	9,400	Under Construction		5
Patel	79 Room Hotel		Under Construction		35

Project Name	Type	Square Footage	Status	Projected Completion Date	Estimated Jobs
Coalinga					
Best Western Hotel	Hotel	44,000	Under Construction	Summer 2017	38
Subway	Retail	4,985	Building Plans Approved, awaiting Building Permit to be pulled	TBD	9
Medical Marijuana Cultivation, Testing and Manufacturing Facility	Industrial	Various (75,000) SF Facilities	Applications to be submitted in the next month	2017	50
Firebaugh					
Valley Health Team	Medical Clinic	10,280	Project approved but not commenced	None at this time	54
Dollar General	Store	9,100	Project approved but not commenced	None at this time	17
Fowler					
Site Plan Review 16-01	Fowler Medical Plaza (Medical Clinic)	50,000	Site Plan and Parcel Map in review	2018	260
Huron					
Adventist Health	Pharmacy/Medical Facility	2,000	Approved 3/10/2016	Nov-17	10
United Health Care	Medical Facility	10,000	Approved 7/17/2016	June-17	52
Amigo Market	Supermarket	6,000	Permitted	Jan-17	12
City of Huron Abuse Shelter	Spousal Abuse Center	36,000	Planning CDBG Grant Approved	Jan-18	6
Kingsburg					
Alves Warehouse expansion	warehouse	210,041	Permits pulled	2016	140
SPR (2016-05(A))	office, lab	20,408	Completed Site Plan Review, project not finalized		68
SPR (2014-05) Amparan Flooring	Warehouse/retail	11,332	Permits pulled	2016-17	11
Orange Cove					
Capital Rivers - NWC of Park and Anchor	Auto Zone	7,458	Site Plan Review Application Submitted	03.01.18	27
Capital Rivers - NWC of Park and Anchor	Dollar Tree	10,000	Site Plan Review Application Submitted	03.01.18	18

Project Name	Type	Square Footage	Status	Projected Completion Date	Estimated Jobs
Capital Rivers - NWC of Park and Anchor	McDonalds	3,042	Site Plan Review Application Submitted	03.01.18	16
Mini Storage Facility - NWC of 12th & Park	Self-Storage Buildings	10,000	Under Construction	09.01.17	1
Mini Storage Facility - NWC of 12th & Park	Managers Office	1,000	Under Construction	09.01.17	1
Reedley					
Trailside Terrace - Commercial Component	70,000 SF Commercial, 34,000 SF Office & 32,000 SF/205 unit Mini Storage	136,000	Under construction	2017	241
Kings River Village - Commercial Component	106,900 medical/office space & 48,130 SF Commercial	155,030	Approved by City Council on April 28, 2015; pending building permits		524
Dopkins Funeral Chapel	14,553 SF chapel, crematory & 4,000 SF gathering/event center	18,553	Entitled in 2015; pending building permits	Estimated Construction Completion Date 2018	19
Sanger					
United Health	Medical office	15,000	Approved	late 2017	78
Cossette	Commercial	8,000	Approved	late 2016	15
Selma					
Medical	Medical Clinic	10,000	In planning stage	unknown	52
Hyundai	Auto Sales	46,700	under construction	2017	47
Toyota	Auto Sales	6,500	Under construction	2017	7
Selma Grove	Commercial Center	360,000	Approved in Planning	Unknown	655
Fitness Evolution	Gym	5,000	Under construction	2017	16
V5 Mini Storage	Storage	124,021	Under review in Planning	unknown	1
Dinuba Shopping Center	Retail	83,332	Under review in Planning	unknown	152
Ford center remodel	Auto	10,000	Tenant improvement	2016	2

Project Name	Type	Square Footage	Status	Projected Completion Date	Estimated Jobs
American Tire	Tire sales	5,000	approved	unknown	18
Floral shopping Center	Commercial Center	19,000	Under construction	2017	35
Summary by Land Use					
Other Industrial					192
Retail					1,838
Health Services					1,134
Hospitality					47

DETAILED PROJECTIONS

The following sections provide the detailed projections for each jurisdiction. All data reflect the sphere of influence (SOI) for each jurisdiction.

CLOVIS

Table 33 – Estimate of Past Job Trends: Clovis SOI

Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 rate	2002 Share	2014 Share
Agriculture	78	63	80	75	72	109	235	244	222	193	128	102	344	13.1%	0.2%	0.7%
Mfg./Mining	4,443	4,469	4,612	4,085	4,675	4,649	4,985	4,767	4,186	4,018	3,360	3,284	3,351	-2.3%	16.3%	13.7%
Other Industrial	4,003	4,027	4,122	4,550	5,299	5,303	4,728	3,445	2,757	2,825	3,020	3,286	4,022	0.0%	7.8%	8.0%
Retail	5,069	5,423	5,840	5,815	6,049	5,694	5,775	5,153	5,038	5,412	5,345	5,763	5,891	1.3%	14.7%	16.8%
Office	2,450	2,561	2,599	2,897	3,163	3,325	3,331	3,006	2,878	3,086	3,389	3,590	3,400	2.8%	6.1%	7.4%
Education	3,285	3,066	2,993	3,027	3,086	3,369	3,273	3,364	3,229	2,820	2,982	2,802	3,019	-0.7%	8.8%	7.9%
Health Services	2,709	2,864	3,239	3,220	3,378	3,608	3,736	3,915	3,603	3,754	4,285	4,280	4,825	4.9%	7.3%	8.8%
Hospitality	2,557	2,500	2,527	2,658	3,257	3,351	3,098	3,309	3,366	3,738	4,053	4,414	4,571	5.0%	9.7%	14.3%
Government	558	558	613	636	659	685	707	629	733	833	826	834	810	3.2%	1.6%	2.5%
Total	25,152	25,531	26,625	26,962	29,639	30,093	29,870	27,831	26,012	26,679	27,387	28,355	30,233	1.5%	7.5%	8.3%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 34 – Job Projections for Clovis SOI by Sector, 2015-2050

JOB SECTOR	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	320	320	320	330	330	330	330	330
Mfg./Mining	3,680	3,680	3,680	3,680	3,680	3,650	3,620	3,600
Other Industrial	4,240	4,610	4,950	5,250	5,550	5,840	6,090	6,350
Retail	6,200	6,820	7,070	7,520	7,960	8,380	8,770	9,190
Office	3,420	3,720	4,050	4,310	4,560	4,800	5,030	5,260
Education	3,250	3,450	3,640	3,870	4,100	4,310	4,520	4,730
Health Services	5,700	6,050	6,400	6,810	7,200	7,580	7,940	8,320
Hospitality	4,760	5,200	5,700	5,920	6,150	6,380	6,630	6,880
Government	830	830	830	880	930	980	1,030	1,080
Total	32,400	34,680	36,640	38,560	40,460	42,270	43,970	45,740

Source: ADE, Inc.

Table 35 – Populations Projections for City of Clovis SOI: 2015-2050

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	114,770	126,850	136,350	145,050	153,490	161,580	169,220	177,210	62,440	1.2%
Tot. Nos. of Persons in Group Qtrs.	430	460	500	540	560	590	620	650	220	1.2%
Tot. Nos. of Persons in HHs	114,340	126,390	135,850	144,510	152,930	160,990	168,600	176,560	62,220	1.2%
Tot. Nos. of HHs	40,660	45,140	47,970	50,090	51,880	53,830	56,150	58,870	18,210	1.1%
Persons Per Households	2.81	2.80	2.83	2.88	2.95	2.99	3.00	3.00		

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 36 – Periodic Housing Unit Requirement Projections: Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates, Clovis SOI

HOUSEHOLDS AND HOUSING UNITS	CUMULATIVE YEARLY INCREMENTS						
	2015-20	2015-25	2015-30	2015-35	2015-40	2015-45	2015-50
Total Number of New Households By Period	4,480	7,310	9,430	11,220	13,170	15,490	18,210
Total Number of New Units Required By Period	4,080	6,470	9,720	11,560	13,570	15,960	18,770

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 37 – Projections of Total Number of Persons in City of Clovis by Age

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
City of Clovis SOI	114,800	126,800	136,400	145,000	153,500	161,600	169,200	177,200	62,400	1.2%	100.0%	100.0%
5 and below	9,300	10,400	11,200	11,800	12,100	12,500	14,100	15,000	5,700	1.4%	8.1%	8.5%
6 to 14	15,100	15,100	15,900	17,100	18,200	18,900	19,300	20,800	5,700	0.9%	13.2%	11.7%
15 to 19	9,000	9,200	8,800	9,000	9,700	10,400	10,800	11,100	2,100	0.6%	7.8%	6.3%
20 to 24	8,700	9,600	9,500	9,000	9,300	10,000	10,600	11,100	2,400	0.7%	7.6%	6.3%
25 to 34	15,000	17,400	19,400	20,000	19,400	19,200	20,100	21,400	6,400	1.0%	13.1%	12.1%
35 to 44	14,500	15,300	16,500	18,500	20,600	21,200	20,500	20,200	5,700	0.9%	12.6%	11.4%
45 to 54	15,300	15,600	15,800	16,100	17,300	19,500	21,500	22,000	6,700	1.1%	13.3%	12.4%
55 to 64	13,500	15,700	16,100	16,000	16,100	16,500	17,600	19,700	6,200	1.1%	11.8%	11.1%
65 to 74	8,500	11,300	13,400	15,200	15,500	15,500	15,500	15,700	7,200	1.8%	7.4%	8.9%
75 and above	5,900	7,300	9,700	12,400	15,400	18,000	19,300	20,100	14,200	3.6%	5.1%	11.3%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 38 – Projections of Total Number of Persons in Clovis by Race and Ethnicity, Clovis SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Clovis SOI	114,800	126,800	136,400	145,000	153,500	161,600	169,200	177,200	62,400	1.2%	100.0%	100.0%
White	65,100	70,100	73,300	75,800	77,800	79,300	81,000	82,700	17,600	0.7%	56.7%	46.7%
Latino	31,200	36,200	40,800	45,400	50,200	55,300	60,200	65,400	34,200	2.1%	27.2%	36.9%
Black	2,600	2,900	3,100	3,200	3,400	3,500	3,500	3,600	1,000	0.9%	2.3%	2.0%
Asian	11,300	12,600	13,700	14,700	15,800	16,800	17,600	18,300	7,000	1.4%	9.8%	10.3%
Pacific Islander	200	300	300	300	300	300	300	400	200	2.0%	0.2%	0.2%
Native American	900	1,000	1,000	1,000	1,000	1,000	1,000	1,000	100	0.3%	0.8%	0.6%
Other	200	200	200	200	200	200	200	200	0	0.0%	0.2%	0.1%
Two or more	3,300	3,700	4,000	4,400	4,800	5,100	5,400	5,600	2,300	1.5%	2.9%	3.2%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 39 – Clovis Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	1,990	1,940	1,800	1,600	1,520	1,450	1,390	1,370
\$10,000 to \$24,999	5,390	5,250	4,880	4,340	4,110	3,920	3,770	3,710
\$25,000 to \$34,999	3,520	3,430	3,190	2,840	2,690	2,560	2,460	2,430
\$35,000 to \$49,999	4,430	4,990	4,680	4,230	4,010	3,820	3,680	3,620
\$50,000 to \$74,999	7,150	7,890	7,830	7,560	7,270	7,170	7,250	7,130
\$75,000 to \$99,999	5,940	7,070	8,360	9,640	9,260	9,030	8,960	8,700
\$100,000 to \$149,999	7,240	8,610	10,180	11,750	13,600	15,300	16,930	18,860
\$150,000 or more	5,010	5,960	7,040	8,130	9,410	10,580	11,710	13,050
Total	40,660	45,140	47,970	50,090	51,880	53,830	56,150	58,870
Mean Income	\$83,270	\$87,140	\$92,860	\$98,750	\$104,010	\$108,240	\$111,650	\$115,070
CAGR		0.9%	1.3%	1.2%	1.0%	0.8%	0.6%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

COALINGA

Table 40 – Estimate of Past Job Trends: Coalinga SOI

Job Sector	Year													2002-2014 CAGR	2002 Share of County	2014 Share of County
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014			
Agriculture	586	311	345	304	325	250	49	63	48	47	2	89	76	-15.7%	1.3%	0.2%
Mfg./Mining	12	525	533	500	25	22	22	18	20	19	19	26	28	7.7%	0.0%	0.1%
Other Industrial	412	421	392	382	462	230	187	191	140	123	144	130	155	-7.8%	0.8%	0.3%
Retail	351	355	401	407	361	408	372	299	277	227	270	257	290	-1.6%	1.0%	0.8%
Office	155	154	179	148	204	151	149	168	151	170	232	165	177	1.1%	0.4%	0.4%
Education	883	851	798	838	880	979	1,092	942	1,045	1,042	942	920	968	0.8%	2.4%	2.5%
Health Services	36	35	24	21	23	34	34	36	38	45	349	293	334	20.4%	0.1%	0.6%
Hospitality	999	807	834	806	335	350	300	259	223	223	229	299	319	-9.1%	3.8%	1.0%
Government	56	50	53	46	39	50	51	53	61	381	346	334	319	15.7%	0.2%	1.0%
Total	3,489	3,509	3,559	3,452	2,654	2,474	2,256	2,028	2,004	2,276	2,534	2,513	2,666	-2.2%	1.0%	0.7%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 41 – Job Projections for Coalinga SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	70	70	70	70	70	70	70	70
Mfg./Mining	30	30	30	30	30	30	30	30
Other Industrial	160	220	220	230	250	260	270	280
Retail	300	330	330	340	360	370	380	390
Office	180	180	180	190	190	200	210	210
Education	1,040	1,090	1,140	1,190	1,230	1,280	1,320	1,360
Health Services	380	430	480	500	520	540	560	570
Hospitality	330	370	380	390	410	430	440	460
Government	330	330	330	340	360	370	380	390
Total	2,820	3,050	3,160	3,290	3,420	3,540	3,660	3,780

Source: ADE, Inc.

Table 42 – Population Projections: 2015-2050: City of Coalinga SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	16,530	17,350	18,170	18,920	19,650	20,350	21,010	21,700	5,170	0.8%
Tot. Nos. of Persons in Group Qtrs.	4,610	4,700	4,970	5,240	5,380	5,580	5,760	5,950	1,340	0.7%
Tot. Nos. of Persons in HHs	11,920	12,650	13,200	13,680	14,270	14,770	15,250	15,750	3,830	0.8%
Tot. Nos. of HHs	4,000	4,270	4,400	4,480	4,570	4,670	4,800	4,960	960	0.6%
Persons Per Households	2.98	2.96	3.00	3.05	3.12	3.16	3.18	2.16		

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 43 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates, Coalinga SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	270	400	480	570	670	800	960
Total Number of New Units Required By Period	90	300	490	590	680	820	990

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 44 – Projections of Total Number of Persons by Age: Coalinga SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Coalinga SOI	16,500	17,300	18,200	18,900	19,600	20,300	21,000	21,700	5,200	0.8%	100.0%	100.0%
5 and below	1,400	1,500	1,600	1,700	1,700	1,700	1,900	2,000	500	0.8%	9.1%	9.2%
6 to 14	2,200	2,200	2,200	2,400	2,500	2,500	2,600	2,700	600	0.7%	13.3%	12.9%
15 to 19	1,200	1,200	1,300	1,200	1,300	1,400	1,400	1,400	300	0.6%	7.3%	6.9%
20 to 24	1,300	1,200	1,200	1,300	1,200	1,300	1,400	1,400	100	0.2%	7.9%	6.5%
25 to 34	2,400	2,600	2,600	2,400	2,400	2,400	2,500	2,700	300	0.3%	14.5%	12.4%
35 to 44	2,200	2,200	2,400	2,600	2,500	2,400	2,400	2,500	300	0.4%	13.3%	11.5%
45 to 54	2,100	2,100	2,100	2,100	2,400	2,600	2,500	2,400	200	0.3%	12.7%	10.6%
55 to 64	2,000	2,300	2,000	2,000	2,000	2,100	2,300	2,500	500	0.6%	12.1%	11.5%
65 to 74	1,000	1,400	1,800	2,000	1,800	1,800	1,900	1,900	800	1.7%	6.1%	8.3%
75 and above	600	800	1,000	1,400	1,800	2,100	2,200	2,300	1,600	3.8%	3.6%	10.1%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 45 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Coalinga SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Coalinga SOI	16,500	17,300	18,200	18,900	19,600	20,300	21,000	21,700	5,200	0.8%	100.0%	100.0%
White	5,900	5,900	5,900	5,800	5,600	5,400	5,300	5,100	-800	-0.4%	35.8%	23.5%
Latino	9,200	10,000	10,900	11,700	12,600	13,600	14,400	15,300	6,100	1.5%	55.8%	70.5%
Black	600	600	600	500	500	500	400	400	-200	-1.2%	3.6%	1.8%
Asian	500	500	500	600	600	600	600	600	100	0.5%	3.0%	2.8%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	100	100	100	100	100	100	100	100	0	0.0%	0.6%	0.5%
Other	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Two or more	200	200	200	200	200	200	200	200	0	0.0%	1.2%	0.9%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 46 – Coalinga Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	390	380	350	310	300	280	270	270
\$10,000 to \$24,999	650	630	590	520	500	470	460	450
\$25,000 to \$34,999	390	380	350	310	300	280	270	270
\$35,000 to \$49,999	560	630	590	530	510	480	460	460
\$50,000 to \$74,999	750	740	740	740	710	700	710	700
\$75,000 to \$99,999	360	430	510	590	570	540	520	470
\$100,000 to \$149,999	640	770	910	1,050	1,210	1,360	1,510	1,680
\$150,000 or more	260	310	360	420	480	540	600	670
Total	4,000	4,270	4,400	4,480	4,570	4,670	4,800	4,960
Mean Income	\$66,320	\$70,170	\$75,600	\$81,440	\$86,250	\$90,290	\$93,690	\$97,000
CAGR		1.1%	1.5%	1.5%	1.2%	0.9%	0.7%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

FIREBAUGH

Table 47 – Estimate of Past Job Trends: Firebaugh SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	252	248	196	178	131	57	62	56	176	178	175	155	113	-6.5%	0.5%	0.2%
Mfg./Mining	393	360	371	6	11	7	11	6	41	43	12	8	16	-23.4%	1.4%	0.1%
Other Industrial	373	415	404	397	413	310	445	453	518	472	510	420	434	1.3%	0.7%	0.9%
Retail	133	125	139	131	128	123	118	109	111	105	104	98	85	-3.6%	0.4%	0.2%
Office	45	50	59	56	53	54	58	54	46	48	49	39	51	1.0%	0.1%	0.1%
Education	307	311	293	292	302	284	273	234	225	222	223	222	236	-2.2%	0.8%	0.6%
Health Services	51	54	46	42	46	22	62	76	52	73	50	100	102	5.9%	0.1%	0.2%
Hospitality	133	122	118	78	71	65	52	72	82	75	84	87	71	-5.1%	0.5%	0.2%
Government	38	32	27	23	23	33	39	34	46	47	43	43	46	1.5%	0.1%	0.1%
Total	1,726	1,716	1,653	1,203	1,179	954	1,121	1,093	1,296	1,263	1,249	1,172	1,154	-3.3%	0.5%	0.3%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 48 – Job Projections for Firebaugh SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	110	110	110	110	110	110	110	110
Mfg./Mining	20	20	20	20	20	20	20	20
Other Industrial	430	460	470	500	530	550	580	600
Retail	80	100	100	110	110	120	120	120
Office	50	50	50	50	60	60	60	60
Education	230	230	230	240	250	260	280	290
Health Services	100	170	180	190	200	210	220	220
Hospitality	70	70	70	70	80	80	80	80
Government	50	50	50	50	60	60	60	60
Total	1,140	1,260	1,280	1,340	1,410	1,470	1,520	1,580

Source: ADE, Inc

Table 49 – Populations Trends and Projections: 2015-2050: Firebaugh SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	7,780	8,370	8,880	9,340	9,790	10,220	10,630	11,060	3,280	1.0%
Tot. Nos. of Persons in Group Qtrs.	10	10	20	10	10	10	20	20	10	2.0%
Tot. Nos. of Persons in HHs	7,770	8,360	8,860	9,330	9,780	10,210	10,610	11,040	3,270	1.0%
Tot. Nos. of HHs	2,000	2,170	2,270	2,350	2,410	2,480	2,570	2,670	670	0.8%
Persons Per Households	3.89	3.85	3.90	3.97	4.07	4.11	4.14	4.13		

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 50 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Firebaugh SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	170	270	350	410	480	570	670
Total Number of New Units Required By Period	100	150	350	420	490	580	690

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 51 – Trends and Projections in Total Number of Persons by Age: Firebaugh SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Firebaugh SOI	7,800	8,400	8,900	9,300	9,800	10,200	10,600	11,100	3,300	1.0%	100.0%	100.0%
5 and below	800	900	1,000	1,000	1,000	1,000	1,000	1,100	300	0.9%	10.3%	9.9%
6 to 14	1,200	1,200	1,300	1,400	1,400	1,400	1,500	1,500	300	0.6%	15.4%	13.5%
15 to 19	700	700	700	700	700	800	800	800	100	0.3%	9.0%	7.2%
20 to 24	800	700	700	700	600	700	800	800	0	0.0%	10.3%	7.2%
25 to 34	1,000	1,400	1,500	1,400	1,300	1,300	1,300	1,500	500	1.0%	12.8%	13.5%
35 to 44	900	900	1,000	1,300	1,400	1,300	1,300	1,300	400	1.0%	11.5%	11.7%
45 to 54	900	900	900	900	1,000	1,300	1,400	1,300	400	0.9%	11.5%	11.7%
55 to 64	700	900	900	900	800	800	900	1,200	500	1.4%	9.0%	10.8%
65 to 74	400	500	700	800	800	800	700	700	300	2.1%	5.1%	6.3%
75 and above	300	300	400	500	700	800	900	900	600	3.7%	3.8%	8.1%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 52 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Firebaugh SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Firebaugh SOI	7,800	8,400	8,900	9,300	9,800	10,200	10,600	11,100	3,300	1.0%	100.0%	100.0%
White	500	500	500	500	500	500	500	500	0	0.0%	6.4%	4.5%
Latino	7,170	7,770	8,290	8,760	9,230	9,680	10,090	10,530	3,360	1.1%	91.9%	94.9%
Black	20	20	20	20	20	20	10	10	-10	-2.0%	0.3%	0.1%
Asian	30	30	30	30	30	30	20	20	-10	-1.2%	0.4%	0.2%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	20	20	20	20	10	10	10	10	-10	-2.0%	0.3%	0.1%
Other	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0		0.0%	0.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 53 – Firebaugh Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	240	230	220	190	180	170	170	170
\$10,000 to \$24,999	510	500	470	410	390	370	360	350
\$25,000 to \$34,999	310	310	280	250	240	230	220	220
\$35,000 to \$49,999	280	320	300	270	260	250	240	230
\$50,000 to \$74,999	470	580	740	910	880	860	870	860
\$75,000 to \$99,999	30	40	40	50	160	260	340	440
\$100,000 to \$149,999	130	160	190	210	250	280	310	340
\$150,000 or more	20	30	30	40	50	50	60	60
Total	2,000	2,170	2,270	2,350	2,410	2,480	2,570	2,670
Mean Income	\$42,580	\$45,420	\$49,050	\$52,920	\$56,600	\$59,660	\$62,200	\$64,510
CAGR		1.3%	1.5%	1.5%	1.4%	1.1%	0.8%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

FOWLER

Table 54 – Estimate of Past Job Trends: Fowler SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	198	190	192	193	181	157	193	172	176	175	175	180	175	-1.0%	0.4%	0.4%
Mfg./Mining	342	274	292	385	320	333	293	234	201	381	461	369	554	4.1%	1.3%	2.3%
Other Industrial	247	280	289	300	342	393	328	297	303	482	453	434	527	6.5%	0.5%	1.0%
Retail	132	125	123	144	164	164	137	192	132	79	116	130	159	1.6%	0.4%	0.5%
Office	227	231	145	166	172	206	246	227	166	230	214	232	139	-4.0%	0.6%	0.3%
Education	232	228	286	258	263	278	287	255	250	243	256	229	252	0.7%	0.6%	0.7%
Health Services	118	128	100	99	92	92	103	102	114	112	105	143	157	2.4%	0.3%	0.3%
Hospitality	10	5	8	10	10	54	82	93	102	124	107	110	118	23.1%	0.0%	0.4%
Government	15	15	17	19	20	20	24	28	29	29	24	25	28	5.5%	0.0%	0.1%
Total	1,520	1,476	1,450	1,573	1,564	1,697	1,693	1,601	1,474	1,856	1,910	1,853	2,109	2.8%	0.5%	0.6%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 55 – Job Projections for Fowler SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	160	160	160	160	160	170	170	170
Mfg./Mining	680	680	680	680	680	670	670	660
Other Industrial	590	640	690	730	770	810	850	890
Retail	180	190	190	200	220	230	240	260
Office	140	140	140	150	160	170	180	190
Education	290	300	310	330	360	380	400	420
Health Services	200	500	560	600	640	680	720	760
Hospitality	130	130	130	140	140	150	150	160
Government	30	30	30	30	30	40	40	40
Total	2,400	2,770	2,890	3,030	3,170	3,300	3,420	3,540

Source: ADE, Inc.

Table 56 – Populations Trends and Projections: 2015-2050: Fowler SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	6,580	7,240	7,890	8,490	9,070	9,630	10,160	10,710	4,130	1.4%
Tot. Nos. of Persons in Group Qtrs.	50	60	60	60	70	70	80	80	30	1.4%
Tot. Nos. of Persons in HHs	6,530	7,180	7,830	8,430	9,000	9,560	10,080	10,630	4,100	1.4%
Tot. Nos. of HHs	2,060	2,280	2,460	2,600	2,720	2,840	2,980	3,150	1,090	1.2%
Persons Per Household	3.17	3.15	3.18	3.24	3.31	3.37	3.38	3.37		

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 57 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Fowler SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	220	400	540	660	780	920	1,090
Total Number of New Units Required By Period	180	330	550	670	800	950	1,120

Source: Applied Development Economics. (*Note: CAGR = compound annual growth rate)

Table 58 – Trends and Projections in Total Number of Persons by Age: Fowler SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fowler SOI	6,600	7,200	7,900	8,500	9,100	9,600	10,200	10,700	4,100	1.4%	100.0%	100.0%
5 and below	600	700	700	800	800	900	900	1,000	300	1.0%	10.6%	9.3%
6 to 14	900	1,000	1,100	1,100	1,200	1,200	1,300	1,400	500	1.3%	13.6%	13.1%
15 to 19	500	500	500	600	600	700	700	700	200	1.0%	7.6%	6.5%
20 to 24	500	500	600	500	600	700	700	700	200	1.0%	7.6%	6.5%
25 to 34	900	1,000	1,100	1,200	1,200	1,200	1,300	1,400	500	1.3%	13.6%	13.1%
35 to 44	900	900	1,000	1,100	1,200	1,200	1,200	1,200	300	0.8%	13.6%	11.2%
45 to 54	800	900	900	1,000	1,000	1,100	1,200	1,200	400	1.2%	12.1%	11.2%
55 to 64	700	800	900	900	900	1,000	1,000	1,100	400	1.3%	10.6%	10.3%
65 to 74	400	500	700	800	800	800	900	900	500	2.3%	6.1%	8.4%
75 and above	300	400	500	600	800	900	1,000	1,100	800	3.8%	4.5%	10.3%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 59 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Fowler SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fowler SOI	6,580	7,240	7,890	8,490	9,070	9,630	10,160	10,710	4,130	1.4%	100.0%	100.0%
White	1,300	1,300	1,300	1,300	1,400	1,400	1,400	1,400	100	0.2%	19.8%	13.1%
Latino	4,500	5,100	5,700	6,200	6,800	7,300	7,800	8,400	3,900	1.8%	68.4%	78.4%
Black	80	80	80	80	70	60	60	50	-30	-1.3%	1.2%	0.5%
Asian	600	640	670	710	740	760	780	790	190	0.8%	9.1%	7.4%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	30	30	30	30	30	20	20	20	-10	-1.2%	0.5%	0.2%
Other	10	10	10	0	0	0	0	0	-10		0.2%	0.0%
Two or more	80	80	90	90	90	80	80	80	0	0.0%	1.2%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 60 – Fowler Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	100	100	90	80	80	70	70	70
\$10,000 to \$24,999	570	550	520	460	430	410	400	390
\$25,000 to \$34,999	180	180	160	150	140	130	130	120
\$35,000 to \$49,999	270	310	290	260	250	240	230	220
\$50,000 to \$74,999	260	330	440	540	520	510	520	510
\$75,000 to \$99,999	290	340	410	470	560	640	720	800
\$100,000 to \$149,999	230	270	320	370	430	480	530	590
\$150,000 or more	170	200	240	270	320	350	390	440
Total	2,060	2,280	2,460	2,600	2,720	2,840	2,980	3,150
Mean Income	\$65,190	\$69,080	\$74,080	\$79,140	\$83,800	\$87,520	\$90,510	\$93,310
CAGR		1.2%	1.4%	1.3%	1.2%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

FRESNO

Table 61 – Estimate of Past Job Trends: Fresno SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	1,363	1,168	1,159	926	1,064	1,056	982	931	792	734	815	1,213	1,368	0.0%	2.9%	2.8%
Mfg./Mining	14,674	14,557	13,995	14,221	14,529	14,958	14,358	12,946	12,292	12,408	12,585	12,494	12,594	-1.3%	53.7%	51.3%
Other Industrial	36,181	35,536	36,934	37,190	38,197	39,228	36,432	32,589	31,117	31,689	31,515	33,171	33,412	-0.7%	70.5%	66.2%
Retail	22,665	22,970	23,680	24,376	24,960	24,645	24,127	22,989	20,881	21,678	22,561	23,233	23,226	0.2%	65.9%	66.4%
Office	30,612	31,943	33,161	34,568	35,393	35,386	35,255	33,887	33,603	31,038	31,982	34,787	38,212	1.9%	76.3%	83.5%
Education	23,875	23,846	23,672	23,444	23,834	24,178	25,166	24,691	23,736	22,333	24,896	25,101	25,956	0.7%	63.7%	68.0%
Health Services	30,501	32,005	33,883	35,105	36,057	37,155	38,200	38,958	37,541	36,230	37,225	38,668	42,001	2.7%	81.8%	76.2%
Hospitality	17,903	17,793	17,598	18,333	19,669	20,273	19,741	18,858	18,073	19,424	19,914	20,385	21,088	1.4%	68.0%	66.2%
Government	31,729	31,250	30,471	30,982	31,540	31,551	31,731	31,481	29,774	27,595	26,447	26,532	26,448	-1.5%	91.2%	81.6%
Total	209,504	211,068	214,552	219,145	225,244	228,431	225,992	217,331	207,809	203,129	207,940	215,583	224,305	0.6%	62.4%	61.9%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 62 – Job Projections for Fresno SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	1,330	1,330	1,330	1,350	1,370	1,380	1,380	1,380
Mfg./Mining	13,350	13,350	13,350	13,350	13,350	13,250	13,140	13,040
Other Industrial	34,520	37,220	39,770	42,140	44,580	46,950	48,920	51,030
Retail	23,860	26,340	27,260	28,660	30,380	31,730	32,820	34,090
Office	38,380	41,340	44,700	47,070	49,060	51,070	52,790	54,300
Education	27,170	28,750	30,330	32,290	35,570	37,580	39,220	41,030
Health Services	44,490	49,530	56,320	59,040	61,590	64,280	67,110	70,000
Hospitality	21,610	23,440	25,490	26,470	27,490	28,550	29,650	30,790
Government	26,850	27,200	27,600	27,990	28,080	28,880	29,690	30,790
Total	231,560	248,500	266,150	278,370	291,470	303,650	314,730	326,450

Source: ADE, Inc.

Table 63 – Populations Trends and Projections: 2015-2050: Fresno SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	574,590	624,040	676,820	725,120	772,030	816,980	859,410	903,790	329,200	1.3%
Tot. Nos. of Persons in Group Qtrs.	10,530	11,090	12,150	13,190	13,890	14,700	15,460	16,260	5,730	1.2%
Tot. Nos. of Persons in HHs	564,060	612,950	664,670	711,930	758,140	802,280	843,950	887,530	323,470	1.3%
Tot. Nos. of HHs	181,830	198,420	212,740	223,700	233,120	243,160	254,770	268,260	86,430	1.1%
Persons Per Household	3.10	3.09	3.12	3.18	3.25	3.30	3.31	3.31		

Source: ADE

Table 64 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Fresno SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	16,590	30,910	41,870	51,290	61,330	72,940	86,430
Total Number of New Units Required By Period	13,360	24,380	43,300	53,040	63,410	75,420	89,370

Source: ADE

Table 65 – Trends and Projections in Total Number of Persons by Age: Fresno SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fresno SOI	574,600	624,000	676,800	725,100	772,000	817,000	859,400	903,800	329,200	1.3%	100.0%	100.0%
5 and below	57,100	61,200	64,100	65,700	67,700	71,000	77,500	82,200	25,100	1.0%	9.9%	9.1%
6 to 14	82,400	88,000	92,100	97,600	100,600	103,200	106,400	113,900	31,500	0.9%	14.3%	12.6%
15 to 19	43,300	45,000	50,800	51,200	55,100	57,000	57,900	59,400	16,100	0.9%	7.5%	6.6%
20 to 24	47,800	44,400	46,300	51,900	52,300	56,100	57,700	58,700	10,900	0.6%	8.3%	6.5%
25 to 34	92,800	97,900	95,800	93,800	101,200	107,200	110,700	116,100	23,300	0.6%	16.2%	12.8%
35 to 44	70,700	84,200	97,200	102,400	99,500	97,200	104,000	109,700	39,000	1.3%	12.3%	12.1%
45 to 54	63,900	65,800	73,300	87,100	99,900	105,000	101,200	98,400	34,500	1.2%	11.1%	10.9%
55 to 64	55,800	61,900	64,600	66,400	73,600	87,200	99,300	103,700	47,900	1.8%	9.7%	11.5%
65 to 74	35,000	45,200	53,300	58,900	61,100	62,800	69,100	81,600	46,600	2.5%	6.1%	9.0%
75 and above	26,000	30,500	39,400	50,200	61,000	70,200	75,500	80,100	54,100	3.3%	4.5%	8.9%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 66 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Fresno SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fresno SOI	574,600	624,000	676,800	725,100	772,000	817,000	859,400	903,800	329,200	1.3%	100.0%	100.0%
White	166,700	171,400	175,600	177,000	176,700	175,500	175,900	177,000	10,300	0.2%	29.0%	19.6%
Latino	284,800	319,300	357,000	394,700	433,800	473,400	510,600	549,300	264,500	1.9%	49.6%	60.8%
Black	39,800	42,400	45,100	47,200	49,000	50,200	50,800	51,200	11,400	0.7%	6.9%	5.7%
Asian	65,600	71,900	78,700	84,600	89,600	94,000	97,600	101,300	35,700	1.2%	11.4%	11.2%
Pacific Islander	800	900	900	1,000	1,100	1,100	1,200	1,300	500	1.4%	0.1%	0.1%
Native American	3,600	3,700	3,800	3,800	3,800	3,800	3,600	3,500	-100	-0.1%	0.6%	0.4%
Other	1,100	1,200	1,300	1,400	1,500	1,500	1,600	1,600	500	1.1%	0.2%	0.2%
Two or more	12,200	13,200	14,400	15,500	16,600	17,500	18,200	18,700	6,500	1.2%	2.1%	2.1%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 67 – Fresno Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	17,270	16,830	15,630	13,910	13,170	12,560	12,080	11,890
\$10,000 to \$24,999	39,760	38,740	35,980	32,020	30,330	28,900	27,810	27,380
\$25,000 to \$34,999	21,500	20,950	19,450	17,310	16,400	15,630	15,040	14,800
\$35,000 to \$49,999	24,860	27,990	26,290	23,770	22,510	21,460	20,640	20,330
\$50,000 to \$74,999	31,050	37,540	48,700	59,770	57,470	56,650	57,260	56,370
\$75,000 to \$99,999	18,720	22,270	26,340	30,390	39,340	47,350	54,850	62,740
\$100,000 to \$149,999	17,490	20,810	24,610	28,390	32,890	36,980	40,920	45,590
\$150,000 or more	11,180	13,300	15,730	18,150	21,020	23,630	26,160	29,140
Total	181,830	198,420	212,740	223,700	233,120	243,160	254,770	268,260
Mean Income	\$59,080	\$62,710	\$67,430	\$72,210	\$76,700	\$80,310	\$83,240	\$85,970
CAGR		1.2%	1.5%	1.4%	1.2%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

HURON

Table 68 – Estimate of Past Job Trends: Huron SOI

Job Sector	Year													2002-2014 CAGR	2002 Share of County	2014 Share of County
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014			
Agriculture	994	979	1,073	920	855	832	828	2,752	1,675	1,027	211	200	441	-6.5%	2.1%	0.9%
Mfg./Mining	0	0	0	0	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Other Industrial	27	22	38	26	121	61	85	55	110	196	28	15	12	-6.5%	0.1%	0.0%
Retail	115	91	92	100	25	12	16	9	46	58	57	52	29	-10.8%	0.3%	0.1%
Office	2	3	3	2	3	0	0	1	4	0	1	1	2	-1.1%	0.0%	0.0%
Education	0	0	0	0	0	20	12	26	107	108	101	108	118	NA	0.0%	0.3%
Health Services	17	21	23	29	31	21	26	20	16	24	22	44	38	6.7%	0.0%	0.1%
Hospitality	28	37	43	41	41	7	10	21	35	58	38	48	22	-1.9%	0.1%	0.1%
Government	12	0	12	6	3	0	9	9	75	57	75	108	78	16.9%	0.0%	0.2%
Total	1,194	1,152	1,285	1,124	1,079	953	986	2,893	2,068	1,528	533	577	740	-3.9%	0.4%	0.2%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 69 – Job Projections for Huron SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	350	350	350	360	360	360	360	360
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	10	10	10	10	10	10	10	10
Retail	30	40	40	40	40	40	40	40
Office	0	0	0	0	0	0	0	0
Education	160	160	160	160	170	170	170	180
Health Services	60	160	160	160	170	170	170	180
Hospitality	30	30	30	30	30	30	30	40
Government	90	90	90	90	90	100	100	100
Total	730	840	840	860	870	890	900	910

Source: ADE, Inc.

Table 70 – Populations Trends and Projections: 2015-2050: Huron SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	6,820	7,430	7,600	7,750	7,900	8,050	8,180	8,330	1,510	0.6%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	6,820	7,430	7,600	7,750	7,900	8,050	8,180	8,330	1,510	0.6%
Tot. Nos. of HHs	1,570	1,710	1,730	1,740	1,730	1,740	1,760	1,790	220	0.4%
Persons Per Household	4.34	4.34	4.39	4.46	4.55	4.64	4.63	4.64		

Source: ADE

Table 71 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Huron SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	140	160	170	160	170	190	220
Total Number of New Units Required By Period	150	170	180	170	180	200	240

Source: ADE

Table 72 – Trends and Projections in Total Number of Persons by Age: Huron SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Huron SOI	6,800	7,400	7,600	7,800	7,900	8,000	8,200	8,300	1,500	0.6%	100.0%	100.0%
5 and below	770	800	810	820	830	830	830	830	60	0.2%	11.3%	10.0%
6 to 14	1,190	1,220	1,100	1,120	1,130	1,160	1,170	1,170	-20	0.0%	17.5%	14.1%
15 to 19	600	630	680	560	580	590	600	620	20	0.1%	8.8%	7.5%
20 to 24	630	600	600	650	540	550	560	580	-50	-0.2%	9.3%	7.0%
25 to 34	1,120	1,220	1,170	1,100	1,150	1,100	1,020	1,050	-70	-0.2%	16.5%	12.7%
35 to 44	880	1,000	1,060	1,090	1,050	1,000	1,050	1,010	130	0.4%	12.9%	12.2%
45 to 54	660	770	830	890	950	980	950	910	250	0.9%	9.7%	11.0%
55 to 64	550	630	600	670	720	780	840	870	320	1.3%	8.1%	10.5%
65 to 74	240	340	480	520	500	560	610	660	420	2.9%	3.5%	8.0%
75 and above	170	220	270	330	460	510	560	620	440	3.7%	2.5%	7.5%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 73 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Huron SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Huron SOI	6,800	7,400	7,600	7,800	7,900	8,000	8,200	8,300	1,500	0.6%	100.0%	100.0%
White	100	110	110	100	90	90	90	100	0	0.0%	1.5%	1.2%
Latino	6,640	7,240	7,420	7,590	7,760	7,900	8,040	8,190	1,550	0.6%	97.6%	98.7%
Black	30	30	30	30	20	20	20	20	-10	-1.2%	0.4%	0.2%
Asian	40	40	30	30	30	20	20	20	-20	-2.0%	0.6%	0.2%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	10	10	10	10	10	10	0	0	-10		0.1%	0.0%
Other	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0		0.0%	0.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 74 – Huron Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	200	200	180	160	150	150	140	140
\$10,000 to \$24,999	470	460	420	380	360	340	330	320
\$25,000 to \$34,999	210	210	190	170	160	150	150	150
\$35,000 to \$49,999	330	370	350	320	300	290	270	270
\$50,000 to \$74,999	220	320	400	490	480	470	470	470
\$75,000 to \$99,999	80	90	110	130	180	230	270	310
\$100,000 to \$149,999	40	50	50	60	70	80	90	100
\$150,000 or more	20	20	20	30	30	40	40	40
Total	1,570	1,710	1,730	1,740	1,730	1,740	1,760	1,790
Mean Income	\$37,560	\$40,590	\$43,560	\$47,130	\$49,810	\$52,170	\$54,270	\$56,010
CAGR		1.6%	1.4%	1.6%	1.1%	0.9%	0.8%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

KERMAN

Table 75 – Estimate of Past Job Trends: Kerman SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	2	3	37	44	30	37	41	16	41	57	58	66	92	39.5%	0.0%	0.2%
Mfg./Mining	114	115	9	126	108	9	8	15	13	10	47	42	162	3.0%	0.4%	0.7%
Other Industrial	109	124	149	166	138	199	234	182	196	190	223	281	238	6.8%	0.2%	0.5%
Retail	667	675	653	669	669	746	622	498	439	478	481	457	501	-2.4%	1.9%	1.4%
Office	184	179	167	258	275	286	288	313	304	259	338	242	312	4.5%	0.5%	0.7%
Education	419	402	391	385	394	400	394	370	412	385	386	382	388	-0.6%	1.1%	1.0%
Health Services	94	90	69	92	87	113	133	143	121	152	146	301	326	10.9%	0.3%	0.6%
Hospitality	214	172	177	204	230	218	218	228	220	201	252	222	243	1.1%	0.8%	0.8%
Government	259	256	236	271	242	254	200	277	94	143	164	162	169	-3.5%	0.7%	0.5%
Total	2,063	2,015	1,888	2,215	2,173	2,262	2,139	2,042	1,839	1,876	2,095	2,155	2,431	1.4%	0.6%	0.7%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 76 – Job Projections for Kerman SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	80	80	80	80	80	80	80	80
Mfg./Mining	190	190	190	190	190	190	190	190
Other Industrial	260	280	310	330	350	370	380	400
Retail	550	610	630	660	700	730	760	790
Office	320	360	400	420	440	460	480	500
Education	440	460	500	530	550	580	600	630
Health Services	400	450	520	550	580	600	630	660
Food Services	260	280	320	330	350	360	370	390
Government	180	180	180	190	200	210	220	230
Total	2,680	2,890	3,130	3,290	3,440	3,580	3,720	3,860

Source: ADE, Inc.

Table 77 – Populations Trends and Projections: 2015-2050: Kerman SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	14,880	15,900	16,930	17,860	18,770	19,650	20,470	21,330	6,450	1.0%
Tot. Nos. of Persons in Group Qtrs.	10	0	10	0	0	10	10	10	0	0.0%
Tot. Nos. of Persons in HHs	14,870	15,900	16,920	17,860	18,770	19,640	20,460	21,320	6,450	1.0%
Tot. Nos. of HHs	4,110	4,410	4,640	4,810	4,950	5,100	5,300	5,530	1,420	0.9%
Persons Per Household	3.62	3.61	3.65	3.71	3.79	3.85	3.86	3.86		

Source: ADE

Table 78 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Kerman SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	300	530	700	840	990	1,190	1,420
Total Number of New Units Required By Period	250	430	720	860	1,020	1,220	1,460

Source: ADE

Table 79 – Trends and Projections in Total Number of Persons by Age: Kerman SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kerman SOI	14,900	15,900	16,900	17,900	18,800	19,600	20,500	21,300	6,400	1.0%	100.0%	100.0%
5 and below	1,600	1,600	1,700	1,800	1,800	1,900	2,000	2,100	500	0.8%	10.7%	9.9%
6 to 14	2,500	2,500	2,400	2,500	2,600	2,700	2,800	2,900	500	0.5%	16.8%	14.1%
15 to 19	1,200	1,300	1,400	1,300	1,300	1,400	1,500	1,500	400	0.8%	8.1%	7.5%
20 to 24	1,200	1,200	1,300	1,400	1,300	1,300	1,400	1,500	300	0.6%	8.1%	7.0%
25 to 34	2,100	2,200	2,400	2,500	2,700	2,700	2,600	2,700	600	0.7%	14.1%	12.7%
35 to 44	2,000	2,200	2,100	2,200	2,400	2,500	2,700	2,600	600	0.8%	13.4%	12.2%
45 to 54	1,600	1,700	2,000	2,100	2,000	2,200	2,300	2,400	800	1.2%	10.7%	11.3%
55 to 64	1,300	1,400	1,500	1,600	1,900	2,000	1,900	2,100	700	1.2%	8.7%	9.4%
65 to 74	800	1,000	1,200	1,300	1,400	1,500	1,700	1,800	1,000	2.3%	5.4%	8.5%
75 and above	500	700	900	1,100	1,300	1,500	1,600	1,800	1,300	3.7%	3.4%	8.5%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 80 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Kerman SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kerman SOI	14,900	15,900	16,900	17,900	18,800	19,600	20,500	21,300	6,400	1.0%	100.0%	100.0%
White	2,560	2,550	2,530	2,480	2,440	2,380	2,350	2,320	-240	-0.3%	17.2%	10.9%
Latino	10,900	11,880	12,890	13,860	14,820	15,750	16,610	17,510	6,610	1.4%	73.2%	82.2%
Black	40	40	40	40	30	30	30	30	-10	-0.8%	0.3%	0.1%
Asian	1,120	1,160	1,200	1,210	1,210	1,220	1,210	1,210	90	0.2%	7.5%	5.7%
Pacific Islander	0	0	0	0	0	0	0	0	0	0.0%	0.0%	0.0%
Native American	60	50	50	50	40	40	30	30	-30	-2.0%	0.4%	0.1%
Other	40	40	30	30	30	30	30	30	-10	-0.8%	0.3%	0.1%
Two or more	170	170	180	190	190	200	200	200	30	0.5%	1.1%	0.9%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 81 – Kerman Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	270	260	240	210	200	190	190	180
\$10,000 to \$24,999	830	800	750	670	630	600	580	570
\$25,000 to \$34,999	700	680	630	560	540	510	490	480
\$35,000 to \$49,999	560	630	590	530	500	480	460	450
\$50,000 to \$74,999	820	910	1,100	1,300	1,250	1,230	1,250	1,230
\$75,000 to \$99,999	350	420	500	580	710	840	950	1,070
\$100,000 to \$149,999	460	540	640	740	860	970	1,070	1,190
\$150,000 or more	130	160	190	220	250	280	310	350
Total	4,110	4,410	4,640	4,810	4,950	5,100	5,300	5,530
Mean Income	\$55,860	\$58,970	\$63,200	\$67,620	\$71,540	\$74,790	\$77,470	\$79,980
CAGR		1.1%	1.4%	1.4%	1.1%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

KINGSBURG

Table 82 – Estimate of Past Job Trends: Kingsburg SOI

Job Sector	Year													2002-2014 CAGR	2002 Share of County	2014 Share of County
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014			
Agriculture	39	60	74	57	57	66	59	52	54	61	58	66	77	5.8%	0.1%	0.2%
Mfg./Mining	1,589	1,780	4,693	4,540	4,668	4,243	4,191	4,120	4,492	1,471	736	412	494	-9.3%	5.8%	2.0%
Other Industrial	294	363	341	338	363	324	347	272	204	1,092	1,124	1,125	1,155	12.1%	0.6%	2.3%
Retail	335	312	351	441	452	325	332	351	315	395	344	352	401	1.5%	1.0%	1.1%
Office	534	538	227	230	247	236	234	219	209	224	236	242	231	-6.7%	1.3%	0.5%
Education	241	229	209	295	283	308	320	310	298	298	270	269	272	1.0%	0.6%	0.7%
Health Services	458	518	392	428	409	450	403	394	307	301	323	322	311	-3.2%	1.2%	0.6%
Hospitality	204	208	225	242	463	344	274	229	230	222	231	261	324	3.9%	0.8%	1.0%
Government	29	66	53	1	1	22	26	87	30	30	75	75	74	8.1%	0.1%	0.2%
Total	3,723	4,073	6,566	6,572	6,942	6,320	6,186	6,034	6,138	4,095	3,397	3,124	3,339	-0.9%	1.1%	0.9%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 83 – Job Projections for Kingsburg SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	70	70	70	70	70	70	70	70
Mfg./Mining	540	540	540	540	540	540	530	530
Other Industrial	1,230	1,480	1,580	1,670	1,770	1,870	1,940	2,030
Retail	420	460	480	510	530	560	590	610
Office	230	230	230	240	260	270	280	290
Education	290	290	290	310	320	340	350	370
Health Services	340	450	500	530	560	580	610	640
Hospitality	340	370	420	440	450	470	490	510
Government	80	80	80	80	90	90	100	100
Total	3,540	3,970	4,190	4,390	4,600	4,790	4,960	5,150

Source: ADE, Inc.

Table 84 – Populations Trends and Projections: 2015-2050: Kingsburg SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	12,750	13,670	14,590	15,440	16,260	17,050	17,790	18,570	5,820	1.1%
Tot. Nos. of Persons in Group Qtrs.	90	100	100	110	110	120	120	130	40	1.1%
Tot. Nos. of Persons in HHs	12,660	13,570	14,490	15,330	16,150	16,930	17,670	18,440	5,780	1.1%
Tot. Nos. of HHs	4,340	4,670	4,930	5,120	5,280	5,460	5,670	5,930	1,590	0.9%
Persons Per Household	2.92	2.91	2.94	2.99	3.06	3.10	3.12	3.11		

Source: ADE

Table 85 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Kingsburg SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	330	590	780	940	1,120	1,330	1,590
Total Number of New Units Required By Period	270	450	810	970	1,150	1,370	1,640

Source: ADE

Table 86 – Trends and Projections in Total Number of Persons by Age: Kingsburg SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kingsburg SOI	12,700	13,700	14,600	15,400	16,300	17,000	17,800	18,600	5,800	1.1%	100.0%	100.0%
5 and below	1,100	1,200	1,300	1,400	1,400	1,500	1,600	1,700	500	1.1%	8.7%	8.6%
6 to 14	1,800	1,700	1,700	1,900	2,100	2,200	2,200	2,300	500	0.7%	14.2%	12.4%
15 to 19	1,000	1,000	1,000	1,000	1,000	1,100	1,200	1,300	300	0.8%	7.9%	7.0%
20 to 24	1,000	1,100	1,100	1,100	1,000	1,100	1,200	1,200	300	0.8%	7.9%	7.0%
25 to 34	1,500	1,800	2,100	2,200	2,200	2,100	2,100	2,300	800	1.2%	11.8%	12.4%
35 to 44	1,500	1,600	1,600	1,900	2,200	2,200	2,200	2,100	600	1.0%	11.8%	11.4%
45 to 54	1,700	1,600	1,600	1,600	1,600	1,900	2,200	2,300	600	0.9%	13.4%	12.4%
55 to 64	1,400	1,600	1,700	1,600	1,600	1,600	1,600	1,900	500	0.9%	11.0%	10.3%
65 to 74	900	1,100	1,300	1,500	1,600	1,500	1,500	1,500	600	1.5%	7.1%	8.1%
75 and above	800	900	1,100	1,300	1,500	1,800	1,900	1,900	1,100	2.5%	6.3%	10.3%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 87 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Kingsburg SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kingsburg SOI	12,700	13,700	14,600	15,400	16,300	17,000	17,800	18,600	5,900	1.1%	100.0%	100.0%
White	6,250	6,440	6,580	6,670	6,720	6,730	6,760	6,800	550	0.2%	49.2%	36.6%
Latino	5,740	6,420	7,150	7,870	8,610	9,360	10,060	10,790	5,050	1.8%	45.2%	58.0%
Black	40	40	40	30	30	30	30	20	-20	-2.0%	0.3%	0.1%
Asian	380	410	440	460	480	490	500	500	120	0.8%	3.0%	2.7%
Pacific Islander	10	10	10	10	10	10	10	10	0	0.0%	0.1%	0.1%
Native American	60	60	60	60	60	50	50	40	-20	-1.2%	0.5%	0.2%
Other	20	20	20	20	20	20	20	20	0	0.0%	0.2%	0.1%
Two or more	250	270	300	320	340	360	380	380	130	1.2%	2.0%	2.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 88 – Kingsburg Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	210	210	190	170	160	150	150	150
\$10,000 to \$24,999	720	700	650	580	550	530	510	500
\$25,000 to \$34,999	310	300	280	250	240	230	220	210
\$35,000 to \$49,999	480	540	510	460	440	420	400	390
\$50,000 to \$74,999	850	820	810	800	770	750	760	750
\$75,000 to \$99,999	840	1,000	1,180	1,360	1,380	1,420	1,470	1,510
\$100,000 to \$149,999	440	520	620	710	830	930	1,030	1,150
\$150,000 or more	490	580	690	790	920	1,030	1,140	1,270
Total	4,340	4,670	4,930	5,120	5,280	5,460	5,670	5,930
Mean Income	\$76,870	\$81,040	\$86,560	\$92,270	\$97,190	\$101,200	\$104,480	\$107,720
CAGR		1.1%	1.3%	1.3%	1.0%	0.8%	0.6%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

MENDOTA

Table 89 – Estimate of Past Job Trends: Mendota SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	138	189	151	122	178	63	43	239	219	195	206	202	157	1.1%	0.3%	0.3%
Mfg./Mining	1	3	4	2	2	3	1	2	1	0	2	1	0	NA	0.0%	0.0%
Other Industrial	103	104	99	112	122	157	151	143	123	120	125	90	97	-0.5%	0.2%	0.2%
Retail	138	134	112	145	170	145	143	136	166	199	195	153	136	-0.1%	0.4%	0.4%
Office	3	3	3	4	1	2	3	2	5	4	11	11	14	12.4%	0.0%	0.0%
Education	158	162	156	158	158	160	159	157	153	146	155	156	161	0.2%	0.4%	0.4%
Health Services	51	60	69	81	101	97	105	103	69	94	103	188	189	11.6%	0.1%	0.3%
Hospitality	39	43	38	40	44	60	71	95	97	102	118	125	92	7.4%	0.1%	0.3%
Government	8	7	6	5	7	9	8	10	12	13	14	13	44	15.9%	0.0%	0.1%
Total	638	706	638	669	784	696	683	887	846	872	929	940	890	2.8%	0.2%	0.2%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 90 – Job Projections for Mendota SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	160	160	160	160	160	170	170	170
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	100	100	100	110	110	120	120	130
Retail	140	140	140	150	150	160	170	170
Office	10	10	10	10	10	10	10	10
Education	160	160	160	170	180	180	190	200
Health Services	190	200	210	220	230	240	250	260
Hospitality	90	90	90	90	100	100	100	110
Government	40	40	40	40	40	50	50	50
Total	890	900	910	950	990	1,030	1,060	1,100

Source: ADE, Inc.

Table 91 – Populations Trends and Projections: 2015-2050: Mendota SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	11,210	11,920	12,630	13,280	13,920	14,520	15,090	15,690	4,480	1.0%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	11,210	11,920	12,630	13,280	13,920	14,520	15,090	15,690	4,480	1.0%
Tot. Nos. of HHs	2,500	2,670	2,800	2,890	2,960	3,040	3,150	3,280	780	0.8%
Persons Per Household	4.48	4.47	4.51	4.60	4.70	4.77	4.79	4.78		

Source: ADE

Table 92 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Mendota SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	170	300	390	460	540	650	780
Total Number of New Units Required By Period	150	250	400	480	560	680	810

Source: ADE

Table 93 – Trends and Projections in Total Number of Persons by Age: Mendota SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Mendota SOI	11,200	11,900	12,600	13,300	13,900	14,500	15,100	15,700	4,500	1.0%	100.0%	100.0%
5 and below	1,200	1,200	1,300	1,300	1,400	1,400	1,500	1,500	300	0.6%	10.7%	9.6%
6 to 14	1,800	1,900	1,800	1,800	1,900	2,000	2,100	2,200	400	0.4%	16.1%	14.0%
15 to 19	900	900	1,100	1,000	1,000	1,000	1,100	1,100	200	0.8%	8.0%	7.0%
20 to 24	900	800	900	1,100	900	1,000	1,000	1,100	200	0.3%	8.0%	7.0%
25 to 34	2,000	1,900	1,800	1,700	2,000	2,000	1,900	1,900	-100	-0.2%	17.9%	12.1%
35 to 44	1,600	1,900	2,000	1,900	1,700	1,600	1,900	1,900	300	0.6%	14.3%	12.1%
45 to 54	1,200	1,300	1,500	1,800	1,900	1,800	1,600	1,600	400	0.9%	10.7%	10.2%
55 to 64	900	1,000	1,100	1,200	1,400	1,700	1,800	1,700	800	1.9%	8.0%	10.8%
65 to 74	400	600	800	900	1,000	1,100	1,300	1,500	1,100	3.7%	3.6%	9.6%
75 and above	300	300	400	600	800	1,000	1,100	1,200	900	4.6%	2.7%	7.6%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 94 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Mendota SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Mendota SOI	11,200	11,900	12,600	13,300	13,900	14,500	15,100	15,700	4,500	1.0%	100.0%	100.0%
White	230	220	220	220	230	230	230	230	0	0.0%	2.1%	1.5%
Latino	10,870	11,590	12,300	12,960	13,590	14,210	14,780	15,390	4,520	1.0%	97.1%	98.0%
Black	30	20	20	20	20	20	20	20	-10	-1.2%	0.3%	0.1%
Asian	40	40	40	30	30	30	20	20	-20	-2.0%	0.4%	0.1%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	20	20	20	20	20	20	10	10	-10	-2.0%	0.2%	0.1%
Other	20	20	20	20	20	20	20	20	0	0.0%	0.2%	0.1%
Two or more	10	10	10	10	10	10	10	10	0	0.0%	0.1%	0.1%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 95 – Mendota Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	320	310	290	260	250	230	230	220
\$10,000 to \$24,999	1,010	980	910	810	770	730	700	690
\$25,000 to \$34,999	360	350	320	290	270	260	250	250
\$35,000 to \$49,999	320	430	570	720	640	590	580	570
\$50,000 to \$74,999	370	440	530	610	600	600	600	680
\$75,000 to \$99,999	70	80	100	110	320	500	660	730
\$100,000 to \$149,999	50	60	80	90	100	110	130	140
\$150,000 or more	0	0	0	0	0	0	0	10
Total	2,500	2,670	2,800	2,890	2,960	3,040	3,150	3,280
Mean Income	\$31,850	\$34,150	\$36,760	\$39,530	\$43,790	\$47,280	\$50,110	\$51,690
CAGR		1.4%	1.5%	1.5%	2.1%	1.5%	1.2%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

ORANGE COVE

Table 96 – Estimate of Past Job Trends: Orange Cove SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	133	165	172	90	96	56	69	65	40	46	38	31	23	-13.6%	0.3%	0.0%
Mfg./Mining	4	4	4	3	4	4	3	3	8	5	7	5	8	6.8%	0.0%	0.0%
Other Industrial	74	74	70	87	77	96	95	83	86	67	92	63	46	-3.9%	0.1%	0.1%
Retail	70	78	77	91	89	92	102	102	104	88	96	85	56	-1.9%	0.2%	0.2%
Office	31	32	35	159	193	185	200	30	29	55	30	40	19	-4.1%	0.1%	0.0%
Education	151	154	149	156	165	210	207	219	222	199	179	176	152	0.0%	0.4%	0.4%
Health Services	85	90	95	109	108	70	85	78	90	106	76	166	184	6.6%	0.2%	0.3%
Hospitality	3	3	0	11	12	9	6	10	4	1	7	2	1	-9.1%	0.0%	0.0%
Government	108	104	116	108	96	0	116	201	193	208	220	270	54	-5.6%	0.3%	0.2%
Total	661	704	719	816	841	722	884	790	776	774	746	839	543	-1.6%	0.2%	0.1%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 97 – Job Projections for Orange Cove SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	20	20	20	20	20	20	20	20
Mfg./Mining	10	10	10	10	10	10	10	10
Other Industrial	50	50	50	50	60	60	60	60
Retail	60	120	120	120	120	130	130	130
Office	20	20	20	20	20	20	20	20
Education	150	150	150	150	150	160	160	160
Health Services	180	210	240	240	250	250	260	260
Hospitality	0	0	0	0	0	0	0	0
Government	50	50	50	50	50	50	50	50
Total	540	630	660	670	690	700	710	720

Source: ADE, Inc.

Table 98 – Populations Trends and Projections: 2015-2050: Orange Cove SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	9,360	9,540	9,710	9,880	10,030	10,190	10,330	10,480	1,120	0.3%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	9,360	9,540	9,710	9,880	10,030	10,190	10,330	10,480	1,120	0.3%
Tot. Nos. of HHs	2,160	2,210	2,230	2,220	2,210	2,210	2,230	2,270	110	0.1%
Persons Per Household	4.33	4.32	4.35	4.45	4.54	4.61	4.63	4.62		

Source: ADE

Table 99 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Orange Cove SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	50	70	60	50	50	70	110
Total Number of New Units Required By Period	20	40	60	50	50	80	110

Source: ADE

Table 100 – Trends and Projections in Total Number of Persons by Age: Orange Cove SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Orange Cove SOI	9,400	9,500	9,700	9,900	10,000	10,200	10,300	10,500	1,100	0.3%	100.0%	100.0%
5 and below	1,080	1,090	1,110	1,120	1,100	1,070	1,060	1,070	0	0.0%	11.9%	10.7%
6 to 14	1,800	1,650	1,450	1,500	1,540	1,540	1,510	1,490	-250	-0.4%	19.1%	14.8%
15 to 19	860	880	940	720	760	790	810	800	-50	-0.2%	9.1%	7.7%
20 to 24	880	800	830	880	680	720	750	770	-100	-0.3%	9.4%	7.4%
25 to 34	1,370	1,500	1,530	1,480	1,570	1,440	1,310	1,380	20	0.0%	14.6%	13.2%
35 to 44	1,130	1,160	1,200	1,310	1,350	1,330	1,410	1,310	170	0.4%	11.9%	12.3%
45 to 54	910	940	970	1,010	1,050	1,160	1,210	1,190	240	0.7%	9.7%	11.0%
55 to 64	670	720	770	800	830	880	920	1,020	320	1.1%	7.1%	9.4%
65 to 74	400	480	540	580	630	660	690	730	300	1.6%	4.3%	6.7%
75 and above	250	310	370	460	530	600	660	720	440	2.9%	2.7%	6.6%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 101 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Orange Cove SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Orange Cove SOI	9,400	9,500	9,700	9,900	10,000	10,200	10,300	10,500	1,100	0.3%	100.0%	100.0%
White	430	390	360	340	320	300	280	270	-160	-1.3%	4.6%	2.6%
Latino	8,730	8,950	9,180	9,380	9,580	9,760	9,930	10,100	1,370	0.4%	92.9%	96.2%
Black	20	20	20	20	10	10	10	10	-10	-2.0%	0.2%	0.1%
Asian	90	80	70	70	60	50	50	40	-50	-2.3%	1.0%	0.4%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	30	20	20	20	20	10	10	10	-20	-3.1%	0.3%	0.1%
Other	20	20	10	10	10	10	10	10	-10	-2.0%	0.2%	0.1%
Two or more	50	50	40	40	40	40	30	30	-20	-1.4%	0.5%	0.3%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 102 – Orange Cove Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	320	310	290	260	250	230	230	220
\$10,000 to \$24,999	640	630	580	520	490	470	450	440
\$25,000 to \$34,999	490	480	440	390	370	350	340	340
\$35,000 to \$49,999	120	130	130	110	110	100	100	100
\$50,000 to \$74,999	330	360	430	520	500	500	500	490
\$75,000 to \$99,999	180	210	250	290	340	390	430	470
\$100,000 to \$149,999	50	60	80	90	100	110	130	140
\$150,000 or more	20	30	30	40	40	50	50	60
Total	2,160	2,210	2,230	2,220	2,210	2,210	2,230	2,270
Mean Income	\$37,370	\$39,530	\$42,870	\$46,920	\$49,560	\$51,930	\$54,050	\$55,770
CAGR		1.1%	1.6%	1.8%	1.1%	0.9%	0.8%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

PARLIER

Table 103 – Estimate of Past Job Trends: Parlier SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	81	75	108	49	41	43	47	44	48	46	34	47	67	-1.6%	0.2%	0.1%
Mfg./Mining	0	3	1	4	2	2	6	0	53	236	273	301	371	NA	0.0%	1.5%
Other Industrial	56	63	74	64	53	126	117	159	296	299	336	287	272	14.0%	0.1%	0.5%
Retail	88	88	104	115	92	94	93	74	72	140	149	155	150	4.6%	0.3%	0.4%
Office	54	54	62	59	72	51	58	52	83	109	79	71	49	-0.9%	0.1%	0.1%
Education	622	615	614	617	533	470	491	430	446	597	645	655	718	1.2%	1.7%	1.9%
Health Services	184	185	181	188	168	151	163	200	220	235	261	317	326	4.9%	0.5%	0.6%
Hospitality	50	60	48	53	60	76	73	65	68	118	90	101	92	5.2%	0.2%	0.3%
Government	135	140	142	128	142	147	147	171	183	176	169	171	123	-0.8%	0.4%	0.4%
Total	1,271	1,282	1,335	1,278	1,163	1,160	1,196	1,197	1,468	1,956	2,036	2,104	2,168	4.5%	0.4%	0.6%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 104 – Job Projections for Parlier SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	70	70	70	70	70	70	70	70
Mfg./Mining	390	390	390	390	390	390	380	380
Other Industrial	280	320	370	390	410	440	460	470
Retail	150	160	160	170	170	180	190	190
Office	50	50	50	50	50	60	60	60
Education	740	790	840	880	910	940	980	1,010
Health Services	340	390	440	460	480	490	510	530
Hospitality	90	90	90	90	100	100	100	110
Government	120	120	120	130	130	130	140	140
Total	2,230	2,380	2,530	2,630	2,720	2,810	2,890	2,970

Source: ADE, Inc.

Table 105 – Populations Trends and Projections: 2015-2050: Parlier SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	15,100	15,870	16,640	17,350	18,040	18,700	19,330	19,980	4,880	0.8%
Tot. Nos. of Persons in Group Qtrs.	10	0	0	0	0	0	10	0	-10	
Tot. Nos. of Persons in HHs	15,090	15,870	16,640	17,350	18,040	18,700	19,320	19,980	4,890	0.8%
Tot. Nos. of HHs	3,480	3,670	3,810	3,900	3,970	4,050	4,170	4,320	840	0.6%
Persons Per Household	4.34	4.32	4.36	4.45	4.55	4.62	4.63	4.63		

Source: ADE

Table 106 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Parlier SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	190	330	420	490	570	690	840
Total Number of New Units Required By Period	150	240	430	500	590	720	870

Source: ADE

Table 107 – Trends and Projections in Total Number of Persons by Age: Parlier SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Parlier SOI	15,100	15,900	16,600	17,400	18,000	18,700	19,300	20,000	4,900	0.8%	100.0%	100.0%
5 and below	1,800	1,800	1,800	1,900	1,900	1,900	2,000	2,000	200	0.4%	11.9%	10.0%
6 to 14	2,700	2,700	2,500	2,600	2,700	2,700	2,800	2,800	100	0.2%	17.9%	14.0%
15 to 19	1,300	1,300	1,500	1,300	1,400	1,400	1,500	1,500	200	0.4%	8.6%	7.5%
20 to 24	1,400	1,200	1,300	1,500	1,300	1,300	1,400	1,400	0	0.1%	9.3%	7.0%
25 to 34	2,300	2,500	2,500	2,400	2,600	2,600	2,500	2,600	300	0.3%	15.2%	13.0%
35 to 44	2,000	2,100	2,200	2,300	2,300	2,300	2,500	2,500	500	0.6%	13.2%	12.5%
45 to 54	1,600	1,600	1,800	1,900	2,000	2,200	2,200	2,100	500	0.8%	10.6%	10.5%
55 to 64	1,100	1,300	1,400	1,500	1,700	1,800	1,800	2,000	900	1.7%	7.3%	10.0%
65 to 74	600	800	900	1,100	1,200	1,300	1,400	1,500	900	2.6%	4.0%	7.5%
75 and above	400	500	600	800	1,000	1,200	1,300	1,500	1,100	3.9%	2.6%	7.5%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 108 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Parlier SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Parlier SOI	15,100	15,900	16,600	17,400	18,000	18,700	19,300	20,000	4,900	0.8%	100.0%	100.0%
White	240	230	220	210	210	200	190	180	-60	-0.8%	1.6%	0.9%
Latino	14,760	15,540	16,330	17,060	17,760	18,440	19,070	19,740	4,980	0.8%	97.7%	98.7%
Black	10	10	10	10	10	10	10	10	0	0.0%	0.1%	0.1%
Asian	40	40	30	30	20	20	20	20	-20	-2.0%	0.3%	0.1%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	10	10	10	10	10	10	10	10	0	0.0%	0.1%	0.1%
Other	20	10	10	10	10	10	10	10	-10	-2.0%	0.1%	0.1%
Two or more	20	20	20	20	10	10	10	10	-10	-2.0%	0.1%	0.1%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 109 – Parlier Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	340	330	310	270	260	250	240	230
\$10,000 to \$24,999	930	900	840	750	710	680	650	640
\$25,000 to \$34,999	610	590	550	490	460	440	420	420
\$35,000 to \$49,999	720	820	770	690	660	630	600	590
\$50,000 to \$74,999	440	500	720	980	940	930	940	920
\$75,000 to \$99,999	130	150	180	210	350	470	580	690
\$100,000 to \$149,999	280	340	400	460	530	600	660	730
\$150,000 or more	30	40	50	50	60	70	80	90
Total	3,480	3,670	3,810	3,900	3,970	4,050	4,170	4,320
Mean Income	\$42,590	\$45,060	\$48,920	\$53,130	\$56,720	\$59,800	\$62,440	\$64,730
CAGR		1.1%	1.7%	1.7%	1.3%	1.1%	0.9%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

REEDLEY

Table 110 – Estimate of Past Job Trends: Reedley SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	60	61	45	76	81	89	94	82	76	84	77	85	84	2.9%	0.1%	0.2%
Mfg./Mining	188	211	228	226	180	153	74	178	200	204	184	189	254	2.5%	0.7%	1.0%
Other Industrial	660	654	671	699	701	697	669	845	852	1,081	982	1,102	1,025	3.7%	1.3%	2.0%
Retail	710	673	642	705	665	702	734	685	690	636	585	592	595	-1.5%	2.1%	1.7%
Office	248	231	247	323	312	277	485	315	581	604	205	256	278	0.9%	0.6%	0.6%
Education	1,459	1,432	1,452	1,362	1,453	1,433	1,401	1,336	1,297	1,143	1,152	1,190	1,267	-1.2%	3.9%	3.3%
Health Services	1,165	1,147	1,250	1,199	1,310	1,475	1,442	1,520	1,351	1,579	1,492	1,419	1,469	2.0%	3.1%	2.7%
Hospitality	303	331	335	412	574	598	694	658	625	614	478	443	434	3.0%	1.2%	1.4%
Government	142	140	139	134	143	158	179	158	200	229	228	206	217	3.6%	0.4%	0.7%
Total	4,935	4,880	5,009	5,136	5,419	5,583	5,773	5,777	5,873	6,173	5,383	5,481	5,623	1.1%	1.5%	1.6%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 111 – Job Projections for Reedley SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	80	80	80	80	80	80	80	80
Mfg./Mining	260	260	260	260	260	260	260	250
Other Industrial	1,050	1,140	1,230	1,300	1,380	1,450	1,510	1,580
Retail	610	870	900	950	990	1,030	1,070	1,110
Office	280	410	460	480	510	530	550	570
Education	1,300	1,370	1,440	1,510	1,580	1,650	1,720	1,780
Health Services	1,530	2,170	2,440	2,560	2,680	2,800	2,910	3,020
Hospitality	440	490	540	560	580	600	630	650
Government	220	220	220	230	240	250	260	270
Total	5,770	7,010	7,570	7,940	8,310	8,660	8,990	9,330

Source: ADE, Inc.

Table 112 – Populations Trends and Projections: 2015-2050: Reedley SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	25,570	27,150	28,740	30,200	31,610	32,960	34,240	35,580	10,010	0.9%
Tot. Nos. of Persons in Group Qtrs.	310	320	340	360	370	390	400	420	110	0.9%
Tot. Nos. of Persons in HHs	25,260	26,830	28,400	29,840	31,240	32,570	33,840	35,160	9,900	0.9%
Tot. Nos. of HHs	7,020	7,490	7,840	8,080	8,280	8,510	8,810	9,160	2,140	0.8%
Persons Per Household	3.60	3.58	3.62	3.69	3.77	3.83	3.84	3.84		

Source: ADE

Table 113 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Reedley SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	470	820	1,060	1,260	1,490	1,790	2,140
Total Number of New Units Required By Period	420	710	1,100	1,300	1,540	1,840	2,210

Source: ADE

Table 114 – Trends and Projections in Total Number of Persons by Age: Reedley SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Reedley SOI	25,600	27,200	28,700	30,200	31,600	33,000	34,200	35,600	10,000	0.9%	100.0%	100.0%
5 and below	2,600	2,700	2,900	3,000	3,100	3,100	3,300	3,500	900	0.9%	10.2%	9.8%
6 to 14	3,900	3,900	3,900	4,200	4,400	4,500	4,600	4,700	800	0.5%	15.2%	13.2%
15 to 19	2,100	2,200	2,200	2,100	2,200	2,400	2,500	2,500	400	0.5%	8.2%	7.0%
20 to 24	2,200	2,100	2,200	2,200	2,100	2,200	2,400	2,500	300	0.3%	8.6%	7.0%
25 to 34	3,600	4,100	4,400	4,300	4,300	4,200	4,200	4,500	900	0.7%	14.1%	12.6%
35 to 44	3,200	3,400	3,500	4,000	4,300	4,200	4,200	4,100	900	0.7%	12.5%	11.5%
45 to 54	3,000	3,100	3,200	3,300	3,400	3,900	4,100	4,100	1,100	0.9%	11.7%	11.5%
55 to 64	2,300	2,600	2,900	3,000	3,000	3,100	3,300	3,700	1,400	1.4%	9.0%	10.4%
65 to 74	1,400	1,700	2,100	2,400	2,600	2,700	2,700	2,800	1,400	2.1%	5.5%	7.9%
75 and above	1,300	1,300	1,600	1,900	2,300	2,600	3,000	3,200	1,900	2.7%	5.1%	9.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 115 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Reedley SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Reedley SOI	25,600	27,200	28,700	30,200	31,600	33,000	34,200	35,600	10,000	0.9%	100.0%	100.0%
White	4,450	4,330	4,200	4,060	3,910	3,760	3,650	3,570	-880	-0.6%	17.4%	10.0%
Latino	19,990	21,700	23,420	25,030	26,620	28,160	29,580	31,040	11,050	1.3%	78.1%	87.2%
Black	90	100	110	120	120	120	120	130	40	1.1%	0.4%	0.4%
Asian	720	700	690	670	640	610	570	540	-180	-0.8%	2.8%	1.5%
Pacific Islander	0	0	0	0	0	0	0	0	0	0.0%	0.0%	0.0%
Native American	60	50	50	50	40	40	40	30	-30	-2.0%	0.2%	0.1%
Other	40	40	40	40	40	40	40	40	0	0.0%	0.2%	0.1%
Two or more	200	210	220	220	230	230	230	230	30	0.4%	0.8%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 116 – Reedley Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	290	280	260	230	220	210	200	200
\$10,000 to \$24,999	1,490	1,450	1,350	1,200	1,140	1,080	1,040	1,030
\$25,000 to \$34,999	890	860	800	710	680	640	620	610
\$35,000 to \$49,999	1,240	1,400	1,310	1,190	1,120	1,070	1,030	1,010
\$50,000 to \$74,999	1,150	1,160	1,350	1,560	1,500	1,480	1,500	1,470
\$75,000 to \$99,999	910	1,080	1,280	1,480	1,640	1,790	1,950	2,090
\$100,000 to \$149,999	750	900	1,060	1,220	1,420	1,590	1,760	1,960
\$150,000 or more	300	360	430	490	570	640	710	790
Total	7,020	7,490	7,840	8,080	8,280	8,510	8,810	9,160
Mean Income	\$59,870	\$63,010	\$67,480	\$72,200	\$76,160	\$79,470	\$82,240	\$84,810
CAGR		1.0%	1.4%	1.4%	1.1%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

SANGER

Table 117 – Estimate of Past Job Trends: Sanger SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	206	251	262	361	202	381	415	443	308	369	308	384	453	6.8%	0.4%	0.9%
Mfg./Mining	339	259	228	230	242	235	247	213	199	223	259	420	644	5.5%	1.2%	2.6%
Other Industrial	648	587	554	671	763	636	547	475	619	645	606	601	615	-0.4%	1.3%	1.2%
Retail	754	664	627	627	653	673	699	717	589	600	676	706	710	-0.5%	2.2%	2.0%
Office	104	106	113	119	152	129	127	116	133	140	144	137	148	3.0%	0.3%	0.3%
Education	787	804	785	789	818	882	873	866	865	860	896	851	920	1.3%	2.1%	2.4%
Health Services	472	359	367	355	333	376	396	391	374	434	462	671	739	3.8%	1.3%	1.3%
Hospitality	343	330	338	408	456	460	462	427	412	345	305	333	376	0.8%	1.3%	1.2%
Government	731	740	765	804	804	872	850	578	510	549	472	485	438	-4.2%	2.1%	1.4%
Total	4,386	4,102	4,039	4,365	4,423	4,644	4,616	4,227	4,009	4,166	4,127	4,588	5,043	1.2%	1.3%	1.4%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 118 – Job Projections for Sanger SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	420	420	420	430	430	440	440	440
Mfg./Mining	750	750	750	750	750	740	740	730
Other Industrial	660	710	760	810	850	900	930	980
Retail	760	850	880	920	960	1,000	1,040	1,080
Office	150	150	150	160	160	170	180	180
Education	1,030	1,090	1,140	1,200	1,250	1,300	1,350	1,400
Health Services	870	1,070	1,210	1,270	1,330	1,380	1,430	1,480
Hospitality	400	450	500	520	540	560	580	600
Government	450	450	450	470	490	510	530	550
Total	5,490	5,940	6,260	6,520	6,770	7,010	7,220	7,450

Source: ADE, Inc.

Table 119 – Populations Trends and Projections: 2015-2050: Sanger SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	26,310	27,860	29,410	30,840	32,220	33,540	34,790	36,100	9,790	0.9%
Tot. Nos. of Persons in Group Qtrs.	140	140	150	170	170	180	180	190	50	0.9%
Tot. Nos. of Persons in HHs	26,170	27,720	29,260	30,670	32,050	33,360	34,610	35,910	9,740	0.9%
Tot. Nos. of HHs	7,320	7,780	8,120	8,360	8,550	8,770	9,060	9,410	2,090	0.7%
Persons Per Household	3.58	3.56	3.60	3.67	3.75	3.80	3.82	3.81		

Source: ADE

Table 120 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Sanger SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	460	800	1,040	1,230	1,450	1,740	2,090
Total Number of New Units Required By Period	340	560	1,070	1,270	1,500	1,800	2,160

Source: ADE

Table 121 – Trends and Projections in Total Number of Persons by Age: Sanger SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Sanger SOI	26,300	27,900	29,400	30,800	32,200	33,500	34,800	36,100	9,800	0.9%	100.0%	100.0%
5 and below	2,700	2,900	3,100	3,200	3,200	3,300	3,400	3,600	900	0.8%	10.3%	10.0%
6 to 14	4,100	4,100	4,100	4,400	4,600	4,700	4,800	4,900	800	0.5%	15.6%	13.6%
15 to 19	2,300	2,200	2,300	2,200	2,400	2,500	2,600	2,600	300	0.3%	8.7%	7.2%
20 to 24	2,200	2,300	2,200	2,300	2,200	2,300	2,500	2,500	300	0.3%	8.4%	6.9%
25 to 34	3,500	3,900	4,500	4,400	4,400	4,400	4,400	4,700	1,200	0.9%	13.3%	13.0%
35 to 44	3,500	3,500	3,400	3,800	4,300	4,300	4,200	4,200	700	0.5%	13.3%	11.6%
45 to 54	3,000	3,200	3,400	3,300	3,300	3,700	4,200	4,100	1,100	0.9%	11.4%	11.4%
55 to 64	2,300	2,600	2,800	3,000	3,200	3,200	3,100	3,500	1,200	1.2%	8.7%	9.7%
65 to 74	1,500	1,700	2,100	2,300	2,500	2,700	2,800	2,800	1,300	1.9%	5.7%	7.8%
75 and above	1,200	1,400	1,600	1,900	2,300	2,600	2,900	3,200	2,000	2.7%	4.6%	8.9%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 122 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Sanger SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Sanger SOI	26,300	27,900	29,400	30,800	32,200	33,500	34,800	36,100	9,800	0.9%	100.0%	100.0%
White	3,590	3,520	3,430	3,340	3,260	3,180	3,130	3,090	-500	-0.4%	13.7%	8.6%
Latino	21,520	23,110	24,730	26,220	27,670	29,070	30,370	31,720	10,200	1.1%	81.8%	87.9%
Black	120	130	130	130	130	130	130	130	10	0.2%	0.5%	0.4%
Asian	720	740	760	770	790	800	810	810	90	0.3%	2.7%	2.2%
Pacific Islander	30	20	20	20	20	20	20	20	-10	-1.2%	0.1%	0.1%
Native American	100	100	90	90	80	70	70	60	-40	-1.4%	0.4%	0.2%
Other	20	20	20	20	20	20	20	20	0	0.0%	0.1%	0.1%
Two or more	220	220	230	240	250	250	250	250	30	0.4%	0.8%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 123 – Sanger Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	360	350	330	290	280	260	250	250
\$10,000 to \$24,999	1,630	1,590	1,480	1,320	1,250	1,190	1,140	1,130
\$25,000 to \$34,999	1,100	1,080	1,000	890	840	800	770	760
\$35,000 to \$49,999	1,010	1,140	1,070	970	910	870	840	830
\$50,000 to \$74,999	1,420	1,500	1,730	1,990	1,920	1,890	1,910	1,880
\$75,000 to \$99,999	710	850	1,000	1,160	1,330	1,480	1,630	1,770
\$100,000 to \$149,999	820	970	1,150	1,330	1,540	1,730	1,920	2,130
\$150,000 or more	260	310	360	420	490	550	610	670
Total	7,320	7,780	8,120	8,360	8,550	8,770	9,060	9,410
Mean Income	\$57,060	\$60,180	\$64,520	\$69,120	\$73,020	\$76,290	\$79,030	\$81,590
CAGR		1.1%	1.4%	1.4%	1.1%	0.9%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

SAN JOAQUIN

Table 124 – Estimate of Past Job Trends: San Joaquin SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	2	2	2	3	5	12	13	4	7	24	24	23	75	38.0%	0.0%	0.2%
Mfg./Mining	0	0	0	0	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Other Industrial	11	91	8	13	104	91	70	44	58	75	126	119	26	7.8%	0.0%	0.1%
Retail	9	11	14	13	16	14	13	3	13	17	14	22	10	1.0%	0.0%	0.0%
Office	1	1	1	0	0	2	2	0	3	2	3	5	5	18.1%	0.0%	0.0%
Education	113	120	118	134	101	0	0	2	296	380	320	291	297	8.4%	0.3%	0.8%
Health Services	2	2	3	3	2	0	0	1	1	0	6	6	7	9.2%	0.0%	0.0%
Hospitality	5	3	7	6	5	6	6	6	5	5	10	5	5	-0.4%	0.0%	0.0%
Government	49	31	53	44	40	49	58	40	80	4	62	49	62	2.0%	0.1%	0.2%
Total	191	261	206	216	274	174	161	99	462	506	565	520	487	8.1%	0.1%	0.1%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 125 – Job Projections for San Joaquin SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	70	70	70	70	70	70	70	70
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	30	30	30	30	30	40	40	40
Retail	10	10	10	10	10	10	10	10
Office	10	10	10	10	10	10	10	10
Education	300	320	360	380	400	420	430	450
Health Services	10	10	10	10	10	10	10	10
Hospitality	10	10	10	10	10	10	10	10
Government	60	60	60	60	70	70	70	80
Total	500	520	560	590	610	640	660	690

Source: ADE, Inc.

Table 126 – Populations Trends and Projections: 2015-2050: San Joaquin SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR *
Tot. Nos. of Persons	4,040	4,310	4,580	4,830	5,070	5,310	5,520	5,750	1,710	1.0%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	4,040	4,310	4,580	4,830	5,070	5,310	5,520	5,750	1,710	1.0%
Tot. Nos. of HHs	900	970	1,020	1,050	1,080	1,110	1,160	1,200	300	0.8%
Persons Per Household	4.49	4.44	4.49	4.60	4.69	4.78	4.76	4.79		

Source: ADE

Table 127 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: San Joaquin SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	70	120	150	180	210	260	300
Total Number of New Units Required By Period	50	90	150	180	220	260	310

Source: ADE

Table 128 – Trends and Projections in Total Number of Persons by Age: San Joaquin SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
San Joaquin SOI	4,000	4,300	4,600	4,800	5,100	5,300	5,500	5,800	1,800	1.0%	100.0%	100.0%
5 and below	400	500	500	600	600	600	600	600	200	0.8%	10.0%	10.3%
6 to 14	800	700	700	700	800	800	800	800	0	0.1%	20.0%	13.8%
15 to 19	400	400	400	300	400	400	400	400	0	0.3%	10.0%	6.9%
20 to 24	400	400	400	400	300	400	400	400	0	0.4%	10.0%	6.9%
25 to 34	500	600	700	800	800	700	700	700	200	0.9%	12.5%	12.1%
35 to 44	500	500	500	600	700	700	800	700	200	0.6%	12.5%	12.1%
45 to 54	400	500	500	500	500	600	700	700	300	1.6%	10.0%	12.1%
55 to 64	300	300	400	400	500	500	400	500	200	1.5%	7.5%	8.6%
65 to 74	200	200	300	300	300	400	400	400	200	2.6%	5.0%	6.9%
75 and above	100	100	200	200	300	300	400	400	300	4.9%	2.5%	6.9%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 129 – Trends and Projections in Total Number of Persons by Race and Ethnicity: San Joaquin SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
San Joaquin SOI	4,000	4,300	4,600	4,800	5,100	5,300	5,500	5,800	1,800	1.1%	100.0%	100.0%
White	110	110	110	100	90	90	90	90	-20	-0.6%	2.8%	1.6%
Latino	3,890	4,160	4,430	4,690	4,950	5,190	5,410	5,640	1,750	1.1%	97.3%	97.2%
Black	0	0	0	0	0	0	0	0	0	0.0%	0.0%	0.0%
Asian	30	30	30	30	30	20	20	20	-10	-1.2%	0.8%	0.3%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	10	10	10	10	10	10	10	0	-10		0.3%	0.0%
Other	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0		0.0%	0.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 130 – San Joaquin Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	190	180	170	150	140	140	130	130
\$10,000 to \$24,999	250	240	220	200	190	180	170	170
\$25,000 to \$34,999	210	210	190	170	160	160	150	150
\$35,000 to \$49,999	90	140	200	270	250	250	240	240
\$50,000 to \$74,999	100	120	140	160	150	150	150	150
\$75,000 to \$99,999	60	70	80	90	170	230	290	350
\$100,000 to \$149,999	0	0	0	0	0	0	0	10
\$150,000 or more	0	0	10	10	10	10	10	10
Total	900	970	1,020	1,050	1,080	1,110	1,160	1,200
Mean Income	\$30,680	\$33,120	\$35,820	\$38,680	\$42,560	\$45,810	\$48,540	\$50,880
CAGR		1.5%	1.6%	1.5%	1.9%	1.5%	1.2%	0.9%

Source: ADE (*note: CAGR = compound annual growth rate)

SELMA

Table 131 – Estimate of Past Job Trends: Selma SOI

	Year															
Job Sector	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2002-2014 CAGR	2002 Share of County	2014 Share of County
Agriculture	354	339	321	432	333	424	454	411	463	232	195	308	350	-0.1%	0.8%	0.7%
Mfg./Mining	1,440	1,374	1,587	1,570	1,441	1,825	1,658	1,352	1,824	1,587	1,945	1,925	414	-9.9%	5.3%	1.7%
Other Industrial	945	1,003	1,100	1,126	1,077	1,022	903	788	647	682	603	616	712	-2.3%	1.8%	1.4%
Retail	1,664	1,838	1,893	1,884	1,814	1,928	2,029	1,738	1,806	1,550	1,314	1,443	1,436	-1.2%	4.8%	4.1%
Office	726	495	348	458	620	643	520	436	399	375	383	378	367	-5.5%	1.8%	0.8%
Education	294	286	270	269	268	285	287	588	619	604	606	580	599	6.1%	0.8%	1.6%
Health Services	292	317	359	356	179	187	198	387	338	388	356	466	516	4.9%	0.8%	0.9%
Hospitality	792	809	832	827	853	863	864	766	729	799	873	943	963	1.6%	3.0%	3.0%
Government	186	162	170	239	226	216	222	202	237	232	228	212	188	0.1%	0.5%	0.6%
Total	6,693	6,623	6,880	7,161	6,811	7,392	7,137	6,668	7,063	6,450	6,503	6,870	5,545	-1.6%	2.0%	1.5%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 132 – Job Projections for Selma SOI by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	350	350	350	360	360	360	360	360
Mfg./Mining	410	410	410	410	410	410	400	400
Other Industrial	710	760	810	860	910	960	1,000	1,040
Retail	1,430	2,470	2,550	2,670	2,790	2,910	3,010	3,130
Office	370	390	420	440	460	480	500	510
Education	600	80	80	80	90	90	90	100
Health Services	530	640	690	720	760	790	820	850
Hospitality	960	1,040	1,120	1,180	1,220	1,250	1,270	1,290
Government	190	190	190	200	210	220	220	230
Total	5,550	6,330	6,620	6,920	7,210	7,460	7,680	7,910

Source: ADE, Inc.

Table 133 – Populations Trends and Projections: 2015-2050: Selma SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	26,680	28,250	29,810	31,250	32,640	33,980	35,240	36,550	9,870	0.9%
Tot. Nos. of Persons in Group Qtrs.	180	190	200	220	220	230	240	240	60	0.8%
Tot. Nos. of Persons in HHs	26,500	28,060	29,610	31,030	32,420	33,750	35,000	36,310	9,810	0.9%
Tot. Nos. of HHs	7,470	7,950	8,290	8,530	8,720	8,950	9,240	9,600	2,130	0.7%
Persons Per Household	3.55	3.53	3.57	3.64	3.72	3.77	3.78	3.78		

Source: ADE

Table 134 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Selma SOI

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	480	820	1,060	1,250	1,480	1,770	2,130
Total Number of New Units Required By Period	360	610	1,090	1,290	1,520	1,830	2,190

Source: ADE

Table 135 – Trends and Projections in Total Number of Persons by Age: Selma SOI

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Selma SOI	26,700	28,200	29,800	31,200	32,600	34,000	35,200	36,600	9,900	0.9%	100.0%	100.0%
5 and below	2,700	2,900	3,100	3,200	3,200	3,300	3,400	3,600	900	0.8%	10.1%	9.8%
6 to 14	4,000	4,000	4,100	4,400	4,600	4,700	4,800	4,900	900	0.6%	15.0%	13.4%
15 to 19	2,200	2,200	2,200	2,200	2,400	2,500	2,600	2,600	400	0.4%	8.2%	7.1%
20 to 24	2,300	2,200	2,200	2,100	2,200	2,300	2,500	2,600	300	0.3%	8.6%	7.1%
25 to 34	3,700	4,300	4,500	4,300	4,200	4,300	4,400	4,800	1,100	0.7%	13.9%	13.1%
35 to 44	3,500	3,500	3,600	4,200	4,400	4,200	4,100	4,200	700	0.5%	13.1%	11.5%
45 to 54	3,000	3,200	3,400	3,400	3,500	4,000	4,300	4,100	1,100	0.9%	11.2%	11.2%
55 to 64	2,400	2,600	2,900	3,000	3,200	3,200	3,300	3,800	1,400	1.4%	9.0%	10.4%
65 to 74	1,600	1,900	2,100	2,400	2,600	2,700	2,800	2,900	1,300	1.7%	6.0%	7.9%
75 and above	1,300	1,500	1,800	2,100	2,400	2,700	3,000	3,200	1,900	2.6%	4.9%	8.7%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 136 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Selma SOI

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Selma SOI	26,700	28,200	29,800	31,200	32,600	34,000	35,200	36,600	9,900	0.9%	100.0%	100.0%
White	3,820	3,640	3,460	3,260	3,070	2,890	2,750	2,650	-1,170	-1.0%	14.3%	7.2%
Latino	21,280	22,990	24,720	26,330	27,910	29,440	30,870	32,310	11,030	1.2%	79.7%	88.3%
Black	160	160	160	160	160	160	160	160	0	0.0%	0.6%	0.4%
Asian	990	1,010	1,040	1,060	1,060	1,060	1,040	1,030	40	0.1%	3.7%	2.8%
Pacific Islander	0	0	0	0	0	0	0	0	0		0.0%	0.0%
Native American	120	120	110	100	90	80	70	60	-60	-2.0%	0.4%	0.2%
Other	60	70	80	90	100	100	110	120	60	2.0%	0.2%	0.3%
Two or more	240	250	250	250	250	250	240	240	0	0.0%	0.9%	0.7%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 137 – Selma Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	370	360	330	300	280	270	260	250
\$10,000 to \$24,999	1,620	1,570	1,460	1,300	1,230	1,170	1,130	1,110
\$25,000 to \$34,999	1,210	1,170	1,090	970	920	880	840	830
\$35,000 to \$49,999	1,170	1,310	1,230	1,110	1,060	1,010	970	950
\$50,000 to \$74,999	1,400	1,480	1,750	2,060	1,980	1,950	1,970	1,940
\$75,000 to \$99,999	880	1,040	1,240	1,430	1,670	1,890	2,100	2,320
\$100,000 to \$149,999	700	830	980	1,130	1,310	1,470	1,630	1,810
\$150,000 or more	150	170	210	240	280	310	340	380
Total	7,470	7,950	8,290	8,530	8,720	8,950	9,240	9,600
Mean Income	\$53,500	\$56,230	\$60,130	\$64,280	\$67,710	\$70,590	\$73,020	\$75,230
CAGR		1.0%	1.4%	1.3%	1.0%	0.8%	0.7%	0.6%

Source: ADE (*note: CAGR = compound annual growth rate)

FRESNO COUNTY (UNINCORPORATED)

Table 138 – Estimate of Past Job Trends: Unincorporated County

Job Sector	Year													2002-2014 CAGR	2002 Share of County	2014 Share of County
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014			
Agriculture	42,113	42,095	41,782	42,571	42,850	44,469	45,314	39,527	41,655	44,432	46,396	46,049	45,114	0.6%	90.4%	92.1%
Mfg./Mining	3,770	3,252	1,206	1,408	1,591	1,773	1,327	1,575	694	3,349	4,001	3,824	5,641	3.4%	13.8%	23.0%
Other Industrial	7,162	7,781	7,894	8,256	8,443	8,854	8,536	7,467	6,523	6,525	8,120	8,973	7,710	0.6%	14.0%	15.3%
Retail	1,471	1,421	1,435	1,191	1,188	1,285	1,350	1,172	1,097	993	1,208	1,240	1,316	-0.9%	4.3%	3.8%
Office	4,718	4,176	4,025	4,256	4,136	3,881	3,941	2,533	1,926	2,782	2,645	2,399	2,364	-5.6%	11.8%	5.2%
Education	4,673	4,294	4,114	4,276	4,262	5,043	4,763	4,410	3,999	6,320	3,093	2,668	2,853	-4.0%	12.5%	7.5%
Health Services	1,064	1,124	1,101	1,073	874	849	1,215	576	2,467	3,371	2,741	3,316	3,597	10.7%	2.9%	6.5%
Hospitality	2,732	2,703	2,757	2,844	3,316	3,312	3,133	2,972	4,120	4,333	2,957	3,072	3,154	1.2%	10.4%	9.9%
Government	744	650	927	655	412	732	834	1,041	2,443	2,672	2,807	2,680	3,301	13.2%	2.1%	10.2%
Total	68,447	67,497	65,242	66,530	67,073	70,200	70,413	61,273	64,924	74,777	73,968	74,221	75,050	0.8%	20.4%	20.7%

Source: ADE, Inc., based on 2014 data provided by Fresno County COG and 2002-2014 data from LEHD.

Table 139 – Job Projections for Unincorporated Fresno County by Sector, 2015-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	43,840	44,340	44,840	45,670	46,230	46,600	46,690	46,600
Mfg./Mining	5,690	5,690	5,690	5,690	5,690	5,650	5,600	5,560
Other Industrial	7,880	8,470	9,050	9,590	10,140	10,680	11,130	11,610
Retail	1,320	1,240	1,340	1,370	1,400	1,420	1,450	1,470
Office	2,390	2,540	2,730	2,790	2,840	2,900	2,950	3,000
Education	2,850	3,510	3,730	3,810	3,880	3,960	4,020	4,100
Health Services	3,680	3,870	4,140	4,230	4,310	4,390	4,470	4,550
Hospitality	3,180	3,340	3,610	5,150	5,860	5,730	5,150	4,430
Government	3,330	3,380	3,480	3,550	3,620	3,690	3,750	3,820
Total	74,160	76,380	78,610	81,840	83,970	85,010	85,210	85,120

Source: ADE, Inc.

Table 140 – Populations Trends and Projections: 2015-2050: Unincorporated County

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	99,330	101,710	104,080	106,250	108,350	110,370	112,280	114,270	14,940	0.4%
Tot. Nos. of Persons in Group Qtrs.	1,520	1,520	1,570	1,630	1,630	1,670	1,700	1,730	210	0.4%
Tot. Nos. of Persons in HHs	97,810	100,190	102,510	104,620	106,720	108,700	110,580	112,540	14,730	0.4%
Tot. Nos. of HHs	28,000	32,480	32,860	32,930	32,860	33,000	33,430	34,070	6,070	0.6%
Persons Per Household	3.49	3.08	3.12	3.18	3.25	3.29	3.31	3.30		

Source: ADE

Table 141 – Periodic Housing Unit Requirement Projections Net of Adjustments for Existing Vacant Stock, Healthy Vacancy Rates, and Replacement Rates: Unincorporated County

HOUSEHOLDS AND HOUSING UNITS	PERIOD						
	15-20	15-25	15-30	15-35	15-40	15-45	15-50
Total Number of New Households By Period	4,480	4,860	4,930	4,860	5,000	5,430	6,070
Total Number of New Units Required By Period	1,130	3,640	5,070	5,000	5,140	5,590	6,240

Source: ADE

Table 142 – Trends and Projections in Total Number of Persons by Age: Unincorporated County

AGE GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Uninc. Area excl. SOIs	99,300	101,700	104,100	106,200	108,400	110,400	112,300	114,300	15,000	0.4%	100.0%	100.0%
5 and below	6,200	7,300	8,400	9,100	9,200	9,100	9,600	10,300	4,100	1.4%	6.2%	9.0%
6 to 14	10,800	9,900	10,300	12,000	13,500	14,200	14,100	14,200	3,400	0.8%	10.9%	12.4%
15 to 19	7,000	6,300	5,800	5,400	6,400	7,400	8,000	8,000	1,000	0.4%	7.0%	7.0%
20 to 24	8,100	7,100	6,400	5,900	5,400	6,500	7,500	8,100	0	0.0%	8.2%	7.1%
25 to 34	10,200	13,700	15,500	13,600	12,500	11,500	12,000	14,100	3,900	0.9%	10.3%	12.3%
35 to 44	9,300	9,300	10,200	13,700	15,600	13,800	12,700	11,600	2,300	0.6%	9.4%	10.1%
45 to 54	13,300	10,700	9,300	9,100	9,900	13,600	15,600	13,700	400	0.1%	13.4%	12.0%
55 to 64	15,400	15,100	12,800	10,300	8,900	8,800	9,500	13,200	-2,200	-0.4%	15.5%	11.5%
65 to 74	10,700	12,600	13,900	13,600	11,500	9,300	8,100	7,900	-2,800	-0.9%	10.8%	6.9%
75 and above	8,200	9,700	11,500	13,600	15,400	16,000	15,000	13,300	5,100	1.4%	8.3%	11.6%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 143 – Trends and Projections in Total Number of Persons by Race and Ethnicity: Unincorporated County

RACE/ETHNIC GROUP	YEAR								2015-2050		2015	2050
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Uninc. Area excl. SOIs	99,300	101,700	104,100	106,200	108,400	110,400	112,300	114,300	15,000	0.4%	100.0%	100.3%
White	39,960	35,990	32,470	28,760	24,810	20,630	16,900	13,520	-26,440	-3.0%	40.2%	11.8%
Latino	45,620	52,280	58,840	65,530	72,550	79,760	86,430	92,950	47,330	2.1%	45.9%	81.3%
Black	2,520	2,320	1,900	1,460	1,020	610	220	0	-2,520		2.5%	0.0%
Asian	9,070	9,060	8,920	8,690	8,360	7,970	7,560	7,070	-2,000	-0.7%	9.1%	6.2%
Pacific Islander	70	70	70	70	70	70	70	70	0	0.0%	0.1%	0.1%
Native American	940	940	930	920	890	840	800	760	-180	-0.6%	0.9%	0.7%
Other	220	230	240	250	260	270	260	260	40	0.5%	0.2%	0.2%
Two or more	930	820	700	560	400	220	40	0	-930		0.9%	0.0%

Source: ADE (*note: CAGR = compound annual growth rate)

Table 144 – Fresno County Unincorporated Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	1,120	1,090	1,010	900	850	810	780	770
\$10,000 to \$24,999	2,870	2,800	2,600	2,310	2,190	2,090	2,010	1,980
\$25,000 to \$34,999	2,710	2,640	2,450	2,180	2,070	1,970	1,890	1,870
\$35,000 to \$49,999	3,580	3,920	3,450	2,830	2,720	2,610	2,500	2,460
\$50,000 to \$74,999	5,970	8,060	6,820	5,630	5,390	5,310	5,370	5,200
\$75,000 to \$99,999	3,870	4,610	5,450	6,290	4,840	3,570	2,460	1,280
\$100,000 to \$149,999	4,370	5,200	6,150	7,100	8,220	9,240	10,230	11,400
\$150,000 or more	3,500	4,160	4,920	5,680	6,580	7,390	8,180	9,120
Total	28,000	32,480	32,860	32,930	32,860	33,000	33,430	34,070
Mean Income	\$83,180	\$85,780	\$92,550	\$99,840	\$105,770	\$110,930	\$115,400	\$120,190
CAGR		0.6%	1.5%	1.5%	1.2%	1.0%	0.8%	0.8%

Source: ADE (*note: CAGR = compound annual growth rate)