

DRAFT

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Fresno County 2019-2050 Growth Projections

Prepared for:

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EXECUTIVE SUMMARY

INTRODUCTION

This report updates the growth projections for Fresno County and the spheres of influence of each of its cities previously published in 2017. The new projections start with a base year of 2019. 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 the existing Department of Finance (DOF) projections updated as of January 2020. However, it should be noted that those projections significantly over estimated recent population growth and were 8,800 above the actual 2020 population reported by DOF in May 2020. In general, DOF projects the San Joaquin Valley to increase its 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 69,700 wage and salary jobs between 2019 and 2050. This equates to an average annual growth rate of about 2,250 jobs over 31 years. For comparison, EDD indicates the County added an average 4,270 jobs per year over the past 29 years, since 1990. However, the current recession due to the Covid-19 pandemic will have a measurable effect on job levels in Fresno County. Table 1 indicates a loss of 30,100 jobs as of April of 2020 and the County is not projected to recover 2019 jobs levels until 2022. The recession will have a longer term effect on the economy due to the loss of businesses and household income.

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

HOUSING MARKET CONDITIONS

Fresno County had seen some improvement in housing conditions since the Great Recession, including declines in overcrowded housing and the number of households overpaying for housing. However, with the short term loss of income due to the recession and a projected longer term slowing of household income growth, it is anticipated that these trends will reverse and the housing market will become more challenging for low income households.

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

JURISDICTION	2019	2020	2025	2030	2035	2040	2045	2050
Total Population								
County	1,018,240	1,023,360	1,069,800	1,112,010	1,151,390	1,185,850	1,215,740	1,240,090
Clovis SOI	134,210	134,780	141,700	147,760	153,420	158,370	162,660	166,160
Coalinga SOI	13,530	13,690	14,570	15,210	15,800	16,320	16,770	17,140
Firebaugh SOI	7,720	7,720	8,790	9,200	9,580	9,920	10,210	10,450
Fowler SOI	6,380	6,580	6,930	7,200	7,460	7,680	7,870	8,030
Fresno SOI	592,350	596,060	621,540	647,980	672,650	694,240	712,960	728,200
Huron SOI	5,700	5,700	5,930	6,200	6,460	6,680	6,880	7,030
Kerman SOI	14,220	14,290	15,660	16,340	16,980	17,540	18,020	18,420
Kingsburg SOI	13,350	13,410	14,360	14,960	15,510	15,990	16,410	16,750
Mendota SOI	11,170	11,220	11,830	12,330	12,790	13,200	13,560	13,850
Orange Cove SOI	9,170	9,170	9,660	10,070	10,450	10,780	11,070	11,310
Parlier SOI	14,040	14,140	14,740	15,380	15,980	16,500	16,950	17,320
Reedley SOI	25,170	25,170	26,100	27,240	28,300	29,230	30,040	30,700
Sanger SOI	28,660	28,770	30,090	31,370	32,560	33,600	34,510	35,240
San Joaquin SOI	3,500	3,500	3,610	3,750	3,880	3,990	4,090	4,170
Selma SOI	26,960	27,000	29,130	30,360	31,510	32,520	33,390	34,100
Balance of County	112,110	112,160	115,160	116,660	118,060	119,290	120,350	121,220
Total Jobs								
County	405,300	375,200	418,800	432,400	444,800	456,500	466,800	475,000
Clovis	36,060	33,260	36,890	38,770	40,540	42,240	43,820	45,200
Coalinga	2,700	2,540	2,930	3,000	3,070	3,140	3,190	3,240
Firebaugh	1,160	1,090	1,230	1,310	1,390	1,470	1,550	1,620
Fowler	2,990	2,740	3,440	3,490	3,530	3,570	3,590	3,610
Fresno	257,140	237,950	264,140	272,810	280,710	288,170	294,730	299,960
Huron	1,240	1,180	1,470	1,510	1,540	1,570	1,600	1,630
Kerman	2,800	2,590	3,690	3,780	3,870	3,960	4,030	4,090
Kingsburg	3,750	3,490	4,400	4,490	4,560	4,620	4,680	4,720
Mendota	910	840	940	970	1,000	1,020	1,050	1,070
Orange Cove	640	600	630	650	670	680	700	710
Parlier	2,300	2,150	2,210	2,300	2,380	2,450	2,510	2,570
Reedley	5,820	5,390	6,730	6,810	6,880	6,890	6,940	6,960
Sanger	5,570	5,150	5,620	5,930	6,220	6,500	6,760	7,010
San Joaquin	480	440	410	430	450	460	480	490
Selma	6,540	6,090	7,400	7,530	7,660	7,770	7,860	7,930
Balance of County	75,200	69,700	76,670	78,620	80,350	81,980	83,320	84,210

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

2050 GROWTH PROJECTIONS

INTRODUCTION

This report presents updated projections for employment, population, housing and demographic characteristics for the Fresno County region. The prior projections started from a base year of 2014 and projected growth from 2015 to 2050. The current projections update the base year to 2019 and revise the projections to 2050. 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 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, reviewed substantive elements of the analysis and provided comments that helped to refine the projections.

There were several issues to address in updating the projections:

- Growth in population and jobs between 2014 and 2019 varied from the prior projections.
- The State Department of Finance (DOF) issued new long term population projections in January 2020. It is anticipated the DOF 2020 projections will be used for the upcoming RHNA cycle, so the county projections need to reflect changes in DOF's outlook.
- The Covid-19 pandemic has caused a recession in 2020 which may extend over a prolonged period and affect the job projections.
- SB 743 (cumulative VMT Traffic Impacts) may affect development potential.

The report begins with a review of these issues as well as 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.

DISCUSSION OF KEY UPDATE COMPONENTS

RECENT GROWTH AND COMPARISON TO PRIOR PROJECTIONS

Between 2014 and 2019, the prior and current base years for the projections, Fresno County added 50,266 population and 41,826 jobs (Tables 2 and 3). The population trends in Table 2 are based on State Department of Finance E-5 Reports as of January of each year. DOF has recalibrated these reports back to 2011 as part of its 2020 projections update. Consequently, the 2014 figures no longer match the previous 2014 FCOG baseline numbers or the 2019 baseline. We have made some

adjustments to the FCOG 2019 baseline to reduce the discrepancy and calculated the 2020 projections to exactly match the DOF January 1, 2020 County population.

During the past five years, Clovis had the highest percent change in population, at 13.9 percent, but a number of cities exceeds the County average, including Fowler, Huron, Kerman, Kingsburg, Mendota, and Sanger.

Table 2 - Population Growth by Jurisdiction, 2014-2019

JURISDICTION	2014	2019	CHANGE	PERCENT OF CHANGE	PERCENT GROWTH
Fresno County	964,929	1,015,195	50,266	100.0%	5.2%
Clovis	102,394	116,609	14,215	28.3%	13.9%
Coalinga	16,331	16,944	613	1.2%	3.8%
Firebaugh	7,811	7,980	169	0.3%	2.2%
Fowler	5,820	6,220	400	0.8%	6.9%
Fresno	517,953	542,012	24,059	47.9%	4.6%
Huron	6,861	7,302	441	0.9%	6.4%
Kerman	14,512	15,767	1,255	2.5%	8.6%
Kingsburg	11,786	12,551	765	1.5%	6.5%
Mendota	11,188	12,278	1,090	2.2%	9.7%
Orange Cove	9,309	9,460	151	0.3%	1.6%
Parlier	14,905	15,658	753	1.5%	5.1%
Reedley	24,970	25,873	903	1.8%	3.6%
Sanger	24,855	27,005	2,150	4.3%	8.7%
San Joaquin	4,049	4,144	95	0.2%	2.3%
Selma	23,807	24,402	595	1.2%	2.5%
UNINC.	168,378	170,990	2,612	5.2%	1.6%

Source: DOF, E-5 2020 Report. Note: Geography is City boundaries, not SOIs.

The job figures show most of the growth occurring in the City of Fresno. Some smaller cities show minimal growth but none decline in jobs except San Joaquin and the unincorporated area, which may be due in part to annexations of developed areas into cities.

As shown in Figure 1, the actual population growth was lower than the 2017 projections while the actual job growth was higher than the projections. Actual job growth also exceeded the projections disseminated by Caltrans for this time frame, which was one of the main comparison projection sets used in developing the 2017 projections.

On the population side, the situation was in flux at the time the 2017 projections were done. DOF had issued projections in 2014 which were substantially higher than their subsequent projections in 2017.

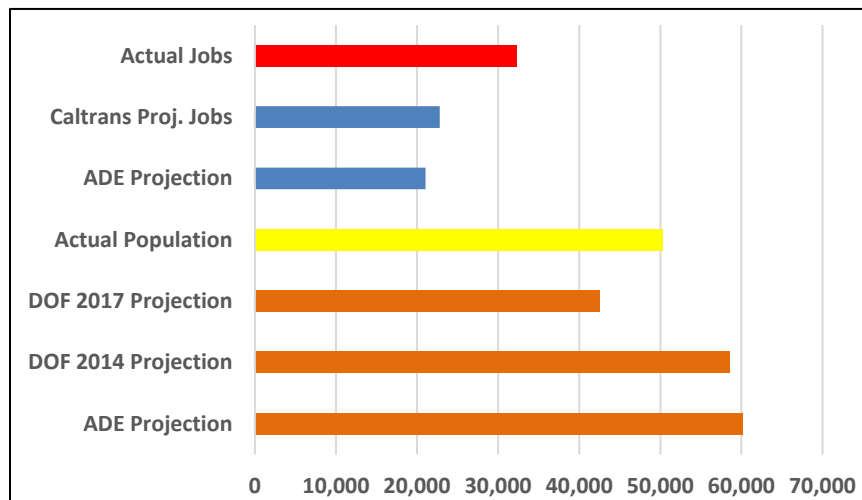
Table 3 - Job Growth by Jurisdiction, 2014-2019

JOB	2014	2019	CHANGE	PERCENT OF CHANGE	PERCENT GROWTH
Fresno County	362,303	404,129	41,826	100.0%	11.5%
Clovis	30,233	36,064	5,831	13.9%	19.3%
Coalinga	2,666	2,697	31	0.1%	1.1%
Firebaugh	1,154	1,157	3	0.0%	0.3%
Fowler	2,110	2,987	877	2.1%	41.6%
Fresno	224,305	257,146	32,841	78.5%	14.6%
Huron	740	1,244	504	1.2%	68.1%
Kerman	2,431	2,798	367	0.9%	15.1%
Kingsburg	3,339	3,751	412	1.0%	12.3%
Mendota	891	912	21	0.1%	2.4%
Orange Cove	543	641	98	0.2%	18.0%
Parlier	2,168	2,297	129	0.3%	6.0%
Reedley	5,624	5,821	197	0.5%	3.5%
San Joaquin	488	478	-10	0.0%	-2.0%
Sanger	5,041	5,566	525	1.3%	10.4%
Selma	5,545	6,542	997	2.4%	18.0%
UNINC.	75,025	74,028	-997	-2.4%	-1.3%

Source: Fresno COG Land Use Database.

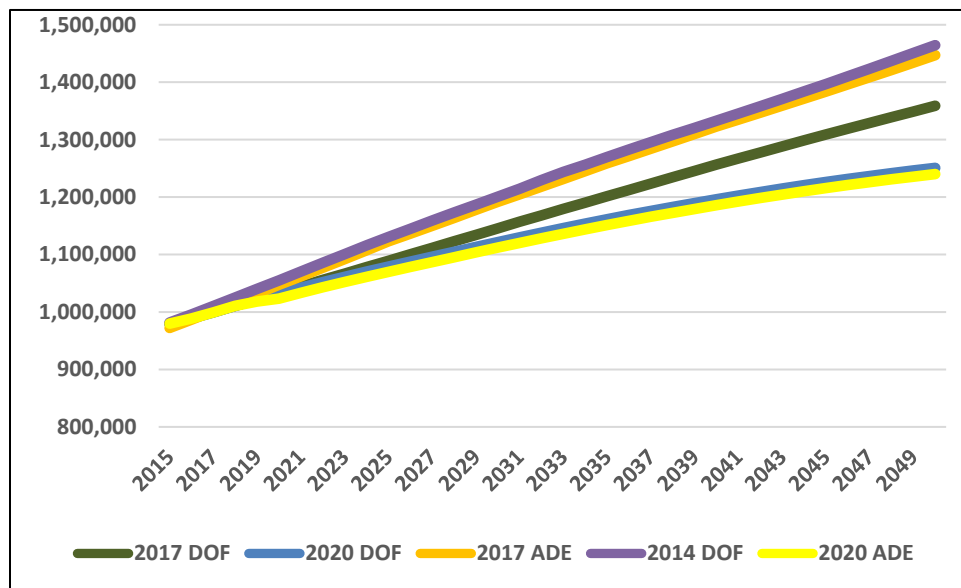
The ADE projections were slightly higher than the DOF projections until new DOF projections were issued in mid-2017, after the ADE projections had been completed. The actual population growth exceeded the 2017 DOF projections but did not reach as high as the ADE projections.

Figure 1 - Comparison of Actual Job and Population Growth to Projections, 2015-2019



The various population projections are also illustrated in Figure 2. The 2017 ADE projections are shown in brown at the top of the chart, just above the 2014 DOF projections, shown in orange. The lower 2014 DOF projections are shown in green through the middle of the chart. The two lower curves are the 2020 DOF projections (blue line) and the current ADE projections (yellow line). The DOF 2020 projections already exceed the growth shown in Table 1 above, which is accounted for in the ADE projections. The ADE projections therefore are lower than the DOF projections beginning in 2020, although they match the DOF E-5 population estimate for 2020.

Figure 2 - Alternate Population Projections



COVID-19 IMPACT ON JOBS

With statewide and local requirements to social distance and close non-essential businesses, Fresno County has seen substantial loss of employment in 2020 due to the corona virus pandemic. As shown in Table 4, the County lost over 31,000 jobs by April 2020, compared to the base year jobs figure from 2019. It is expected May and June have brought additional job losses. The largest losses are in Leisure and Hospitality, but the retail sector is included with Trade, Transportation and Utilities, which likely masks some of the steep declines in that sector.

While there remains considerable uncertainty about the pace of economic recovery from the recession, economists have forecasted various possible scenarios. ADE has replicated these scenarios for the Fresno County economy, as illustrated in Figure 3. The gray line represents a “V” shaped recovery which postulates that the loss of jobs is a very temporary consequence of trying to “flatten the curve” of hospitalizations from the virus, and when that is accomplished economy activity will resume much as it was before the virus. This scenario banks on the fact that the US economy was very strong going into the virus episode and would recover quickly without the shelter in place restrictions on economic

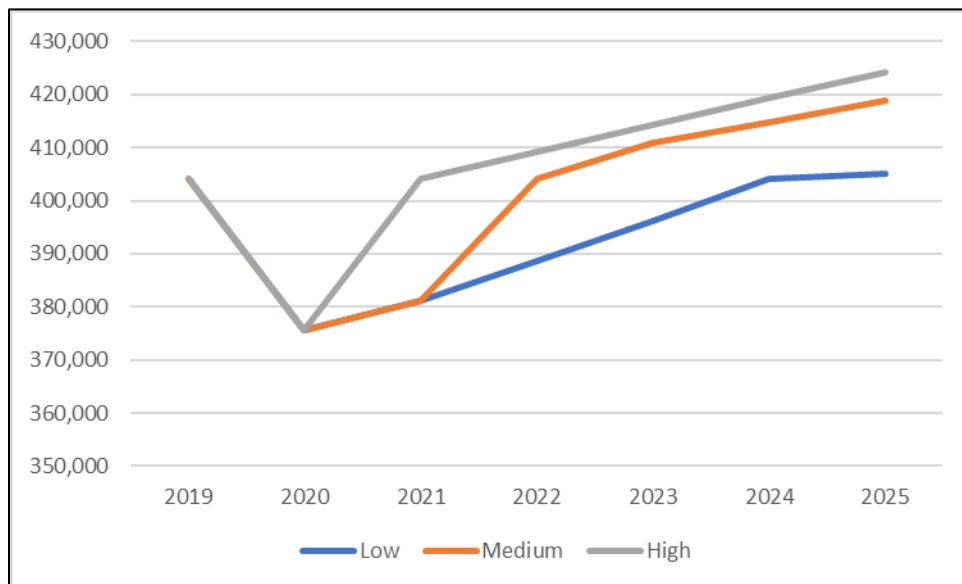
activity. As of this writing in September 2020, this scenario appears to be less likely given the slow response of the virus to the measures taken to date.

Table 4 - Covid-19 Impact on Jobs in Fresno County, April 2020

SECTOR	APR-19	APR-20	CHANGE	PERCENT
Total	406,900	375,500	(31,400)	-7.7%
Farm	43,300	41,000	(2,300)	-0.6%
Mining & Logging	300	300	0	0.0%
Construction	18,600	17,500	(1,100)	-0.3%
Manufacturing	25,400	24,400	(1,000)	-0.2%
Trade, Transportation, Utilities	68,100	65,800	(2,300)	-0.6%
Information	3,500	2,800	(700)	-0.2%
Financial Activities	14,500	14,700	200	0.0%
Professional & Business Services	32,300	30,300	(2,000)	-0.5%
Education & Health Services	73,000	70,700	(2,300)	-0.6%
Leisure & Hospitality	35,600	23,600	(12,000)	-2.9%
Other Services	11,900	8,700	(3,200)	-0.8%
Government	77,400	75,700	(1,700)	-0.4%

Source: CA Employment Development Department. Data not seasonally adjusted.

Figure 3 - Alternate Recovery Scenarios for Fresno County Jobs



The second scenario in orange, is viewed as a “U” shaped recovery and is benchmarked to the production and widespread deployment of a vaccine, which would restore consumer confidence to

resume buying and travel behavior as before and would allow businesses to resume full operations. This scenario assume the vaccine will become widely available in mid to late 2021 and that economic activity will be back to pre-Covid levels in the first quarter of 2022.

The third scenario recognizes that a large number of businesses continue to go out of business permanently due to the shutdown. With businesses closing, those jobs will not be there for workers to return to even if a vaccine is effective. It will take additional years for new businesses to start up and for households to recover from the income loss during the recession before “normal” level of economic activity can resume. Under the assumption modeled for Fresno County, jobs would not recover to their 2019 levels until 2024 in this scenario. Even at that point, long term job growth would proceed more slowly as income and capital levels are replenished.

Figure 4 combines these short term recovery scenarios with low, medium and high projections for longer term job growth, to indicate the range of possible job levels out to the year 2050. The low projections reflects Caltrans’ current projections for Fresno County while the high projection is based on growth rates projected by Woods & Poole Economics, a nationally recognized economic forecasting firm. For the 2020 to 2050 projections in this report, ADE uses the mid-range projection as the most likely scenario for Fresno County. This is based on the “U” shaped short term recovery scenario and updated projections based on the ADE methodology for the 2017 projections.

Figure 4 - Alternate Long Term Jobs Projection Scenarios for Fresno County

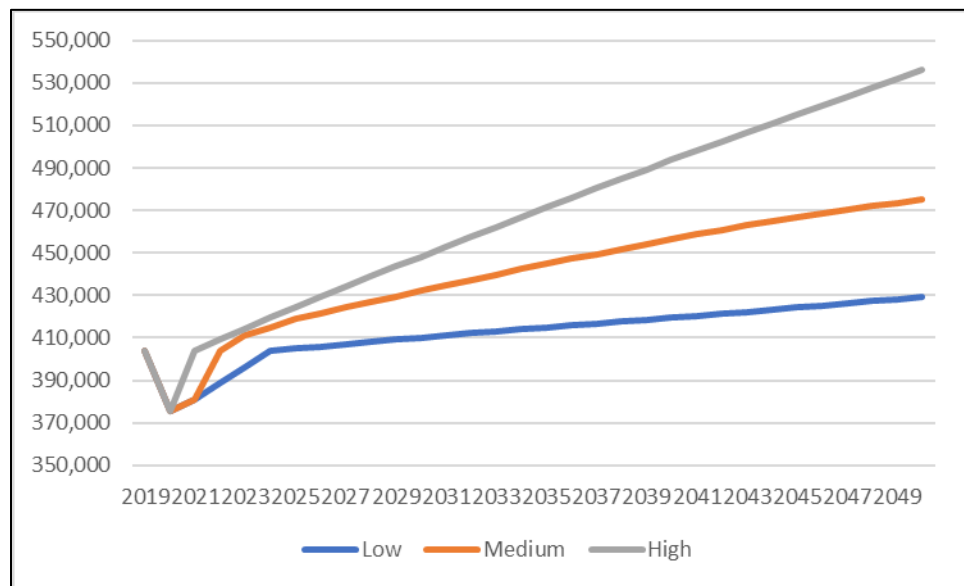


Table 5 shows the countywide projections by industry sector based on the mid-range scenario. The decline of 7.4 percent in 2020 is only through April of that year, as we expect further declines into 2021. Highlights over the longer term include the following:

- Agriculture is projected to see minimal growth due to water constraints. ADE reviewed regional plans to address the state Sustainable Groundwater Management Act (SGMA). Analysts expect continued short supplies of water for agricultural uses as areas seek to mitigate declining groundwater supplies, although it is not clear from the adopted plans that urban growth will be significantly affected.
- Manufacturing is widely projected to continue to decline in total jobs statewide. However, certain industries within manufacturing will continue to grow and other industrial sectors are projected to have among the highest overall growth rates.
- Health care continues to anticipate job growth due to aging demographics.

Table 5 - Fresno County Job Projections by Sector, 2019-2050

INDUSTRY SECTOR	2019	2020	2025	2030	2035	2040	2045	2050	CAGR	2019-2050
Agriculture	44,000	41,000	44,300	45,100	45,600	46,000	46,100	46,000	0.1%	2,000
Mfg./Mining	26,500	24,700	26,500	26,500	26,500	26,400	26,100	25,800	-0.1%	-700
Other Industrial	62,000	56,000	63,800	66,600	69,400	71,900	74,300	76,600	0.7%	14,600
Retail	38,600	36,000	40,100	41,400	42,500	43,500	44,400	44,900	0.5%	6,300
Office	51,000	47,800	53,800	55,500	57,200	58,700	60,100	60,900	0.6%	9,900
Education	43,100	43,200	43,900	45,400	46,800	47,800	48,900	49,400	0.4%	6,300
Health Services	68,800	66,900	73,600	77,100	80,100	83,500	87,000	90,500	0.9%	21,700
Hospitality	35,600	23,600	36,300	37,300	38,200	39,200	39,800	40,300	0.4%	4,700
Government	35,700	36,000	36,500	37,500	38,500	39,500	40,100	40,600	0.4%	4,900
Total	405,300	375,200	418,800	432,400	444,800	456,500	466,800	475,000	0.5%	69,700
Total CAGR		-7.4%	2.2%	0.6%	0.6%	0.5%	0.4%	0.3%		

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

PLANNED PROJECTS IN THE SHORT TERM DEVELOPMENT PIPELINE

In order to tailor the short term projections to development activity in the Fresno County communities, ADE surveyed the cities and the County to compile an inventory of development projects currently approved or in the planning process (Table 6). This data helps to update actual development between April 2019 and April 2020, as well as preview coming development that may occur over the next two to three years. We expect the timing of some of these projects to be affected by the recession. However, there were about 2,000 dwelling units constructed in 2019 and another 9,600 are either approved or in planning stages. For non-residential development, there was about 2.3 million sq. ft. of building space constructed in 2019 and another 4.8 million sq. ft. are planned. In total, this non-residential development would potentially support 8,157 jobs (Table 7).

Table 6 - Residential Units and Non-Residential Building Space Constructed or in Planning Process, April 2019 and April 2020

LAND USE	STATUS	CLOVIS	COALINGA	FIREBAUGH	FRESNO	KERMAN	KINGSBURG	MENDOTA	ORANGE			SELMA	COUNTY	TOTAL
									COVE	REEDLEY	SANGER			
Single family	Constructed				1,456							19	15	1,490
	Approved	717	150		445	105			1	34	135	67		1,654
	BP			164	1,087		220	85			72	57	93	1,778
	Submitted	540			72	189						177	104	1,082
Total SF		1,257	150	164	3,060	294	220	85	1	34	207	320	212	6,004
Multi-Family	Constructed				470	61								531
	Approved	418	117	96	1,868	60	64			92	38	20		2,773
	BP				793			11	81				8	893
	Submitted	56		34	1,094							227		1,411
Total MF		474	117	130	4,225	121	64	11	81	92	38	247	8	5,608
Manufacturing	Constructed				892,409					5,045				897,454
	Approved	8,780	78,842		135,962					63,786				287,370
	BP				129,370									129,370
	Submitted		10,000											10,000
Commercial	Constructed				15,185	4,000								19,185
	Approved	32,926	9,180		424,551	240,360	26,698			209,040	19,366	17,500		979,621
	BP				150,574									150,574
	Submitted											19,000		19,000
Other Industry	Constructed				1,084,521	78,000				20,550				1,183,071
	Approved	15,574			481,300		105,353			129,439				731,666
	BP				831,511					1,238				832,749
	Submitted												22,412	22,412
Office	Constructed				104,809	91,364								196,173
	Approved	117,222			404,157									521,379
	BP				77,332								11,526	88,858
	Submitted	11,470										58,500		69,970
Hospitality	Constructed					10,736					2,835			13,571
	Approved	183,534			328,892									512,426
	BP				72,608									72,608

LAND USE	STATUS	CLOVIS	COALINGA	FIREBAUGH	FRESNO	KERMAN	KINGSBURG	MENDOTA	ORANGE COVE	REEDLEY	SANGER	SELMA	COUNTY	TOTAL
	Submitted											67,300		67,300
Education	Constructed					6,160								6,160
	Approved	3,321		41,203	4,800									49,324
	BP				10,902									10,902
	Submitted												15,640	15,640
Medical	Constructed										3,710			3,710
	Approved	20,983			51,583									72,566
	BP				16,547			20,200						36,747
	Submitted		35,000											35,000
Government	Constructed					3,500								3,500
	Approved	30,412		6,500										36,912
	BP				10,678									10,678
	Submitted													0

Table 7 - Job Potential in Planned Non-Residential Projects

LAND USE	STATUS	CLOVIS	COALINGA	FIREBAUGH	FRESNO	KERMAN	KINGSBURG	MENDOTA	ORANGE COVE	REEDLEY	SANGER	SELMA	COUNTY	TOTAL
Manufacturing	Constructed	0	0	0	1,275	0	0	0	0	7	0	0	0	1,282
	Approved	13	113	0	194	0	0	0	0	91	0	0	0	411
	BP	0	0	0	185	0	0	0	0	0	0	0	0	185
	Submitted	0	14	0	0	0	0	0	0	0	0	0	0	14
Commercial	Constructed	0	0	0	28	7	0	0	0	0	0	0	0	35
	Approved	60	17	0	772	437	49	0	0	380	35	32	0	1,781
	BP	0	0	0	274	0	0	0	0	0	0	0	0	274

LAND USE	STATUS	CLOVIS	COALINGA	FIREBAUGH	FRESNO	KERMAN	KINGSBURG	MENDOTA	ORANGE COVE	REEDLEY	SANGER	SELMA	COUNTY	TOTAL
	Submitted	0	0	0	0	0	0	0	0	0	0	35	0	35
Other Industry	Constructed	0	0	0	1,085	78	0	0	0	21	0	0	0	1,183
	Approved	16	0	0	481	0	105	0	0	129	0	0	0	732
	BP	0	0	0	832	0	0	0	0	1	0	0	0	833
	Submitted	0	0	0	0	0	0	0	0	0	0	0	22	22
Office	Constructed	0	0	0	349	305	0	0	0	0	0	0	0	654
	Approved	391	0	0	1,347	0	0	0	0	0	0	0	0	1,738
	BP	0	0	0	258	0	0	0	0	0	0	0	38	296
	Submitted	38	0	0	0	0	0	0	0	0	0	195	0	233
Hospitality, 1150, 160	Constructed	0				67					18			85
	Approved	238			363	0								601
	BP	0			50	0								50
	Submitted	0				0						59		59
Education	Constructed	0	0	0	0	9	0	0	0	0	0	0	0	9
	Approved	5	0	59	7	0	0	0	0	0	0	0	0	70
	BP	0	0	0	16	0	0	0	0	0	0	0	0	16
	Submitted	0	0	0	0	0	0	0	0	0	0	0	22	22
Medical	Constructed	0	0	0	0	0	0	0	0	0	8	0	0	8
	Approved	46	0	0	114	0	0	0	0	0	0	0	0	161
	BP	0	0	0	37	0	0	45	0	0	0	0	0	81
	Submitted	0	77	0	0	0	0	0	0	0	0	0	0	77
Government	Constructed	0	0	0	0	4	0	0	0	0	0	0	0	4
	Approved	30	0	7	0	0	0	0	0	0	0	0	0	37
	BP	0	0	0	11	0	0	0	0	0	0	0	0	11
	Submitted	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Jobs		837	221	65	7,675	906	154	45	0	630	61	320	83	10,997
	Constructed	0	0	0	2,736	469	0	0	0	28	26	0	0	3,259
	Approved	798	129	65	3,278	437	154	0	0	601	35	32	0	5,530
	BP	0	0	0	1,661	0	0	45	0	1	0	0	38	1,745
	Submitted	38	92	0	0	0	0	0	0	0	0	288	45	463

SB 743

SB 743, which took effect July 1, 2020, updates the way transportation impacts are measured for development projects in California. According to the Legislature: "New methodologies under the California Environmental Quality Act [were] needed for evaluating transportation impacts that are better able to promote the state's goals of reducing greenhouse gas emissions and traffic-related air pollution, promoting the development of a multimodal transportation system, and providing clean, efficient access to destinations."

The central feature of this change is to switch the transportation impact metric from Level of Service (LOS) at intersections to Vehicle Miles Traveled (VMT). Development that would cause longer commutes or shopping trips in automobiles would generate higher VMT levels and require more extensive mitigation. Fresno COG is in the process of identifying low, medium and high VMT areas in each of the jurisdictions that would need more or less traffic mitigation if development occurs in those areas. This regional traffic modeling is intended to be updated annually, reflecting changes in development and traffic patterns.

The potential impact of SB 743 was considered in the preparation of the projections in this report; however, only a few changes were made to the baseline projections for several reasons.

- During the upcoming RHNA process, the COG is obligated to adopt population projections that are within a 1.5 percent margin of the official DOF projections. The baseline projections are 0.9 percent below DOF, so there is little remaining margin to assume SB 743 will significantly reduce housing growth countywide.
- In 12 of 16 jurisdictions in the County, the jobs housing balance is projected to improve over 2019 conditions. In the smaller cities, bringing more jobs for local workers should reduce VMT, which is consistent with the goals of SB 743.
- It is unclear at this time how much of an effect SB 743 will have on development patterns. While some cities currently are constrained with little vacant land in low VMT areas, future general plan amendments could alter this situation and OPR has recognized that local jurisdictions can adopt statements of overriding considerations through the CEQA process to approve significant development projects offering other benefits.

Fresno COG intends to model potential effects of SB 743 using the current projections as a baseline and changes to the projections may occur as a result of this future analysis.

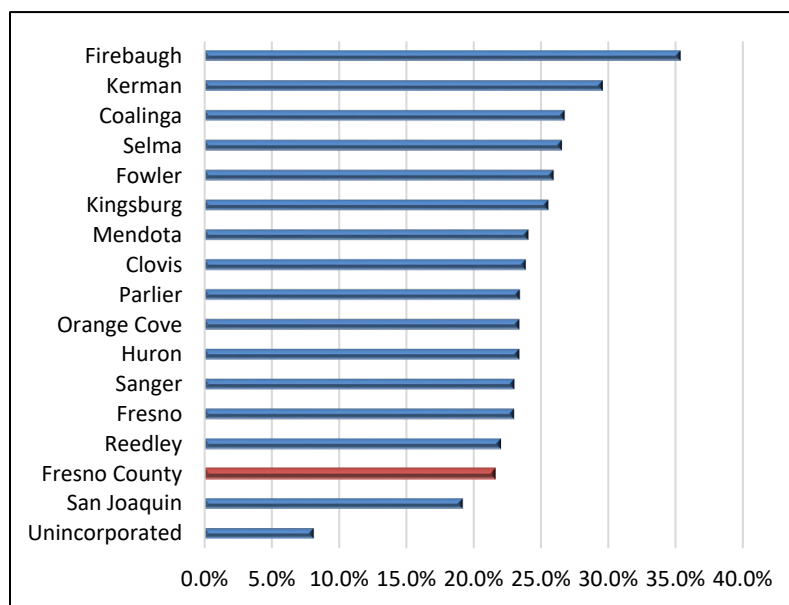
POPULATION AND DEMOGRAPHIC PROJECTIONS FOR FRESNO COUNTY

Fresno County is projected to add nearly 222,000 people by 2050 (Table 8). The City of Fresno would see the largest growth, at 135,850 people, followed by Clovis at 31,950. On a percentage basis, however, most of the smaller cities are projected to see more rapid growth, as shown in Figure 5.

Table 8 - Total Population Projections by Jurisdiction, 2019-2050

JURISDICTION	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE
Fresno County	1,018,240	1,023,360	1,069,800	1,112,010	1,151,390	1,185,850	1,215,740	1,240,090	221,850
Clovis and SOI	134,210	134,780	141,700	147,760	153,420	158,370	162,660	166,160	31,950
Coalinga and SOI	13,530	13,690	14,570	15,210	15,800	16,320	16,770	17,140	3,610
Firebaugh and SOI	7,720	7,720	8,790	9,200	9,580	9,920	10,210	10,450	2,730
Fowler and SOI	6,380	6,580	6,930	7,200	7,460	7,680	7,870	8,030	1,650
Fresno and SOI	592,350	596,060	621,540	647,980	672,650	694,240	712,960	728,200	135,850
Huron and SOI	5,700	5,700	5,930	6,200	6,460	6,680	6,880	7,030	1,330
Kerman and SOI	14,220	14,290	15,660	16,340	16,980	17,540	18,020	18,420	4,200
Kingsburg and SOI	13,350	13,410	14,360	14,960	15,510	15,990	16,410	16,750	3,400
Mendota and SOI	11,170	11,220	11,830	12,330	12,790	13,200	13,560	13,850	2,680
Orange Cove and SOI	9,170	9,170	9,660	10,070	10,450	10,780	11,070	11,310	2,140
Parlier and SOI	14,040	14,140	14,740	15,380	15,980	16,500	16,950	17,320	3,280
Reedley and SOI	25,170	25,170	26,100	27,240	28,300	29,230	30,040	30,700	5,530
Sanger and SOI	28,660	28,770	30,090	31,370	32,560	33,600	34,510	35,240	6,580
San Joaquin and SOI	3,500	3,500	3,610	3,750	3,880	3,990	4,090	4,170	670
Selma and SOI	26,960	27,000	29,130	30,360	31,510	32,520	33,390	34,100	7,140
Unincorporated Areas	112,110	112,160	115,160	116,660	118,060	119,290	120,350	121,220	9,110

Figure 5 - Projected Percent Population Growth by Jurisdiction, 2019-2050



As of 2019, just over 1 million persons are in households and 17,630 are in group quarters, including prisons, dormitories and medical facilities (Table 9). The group quarters population has remained remarkably steady since the year 2000, when there were 17,667 in group quarters. However, ADE projects this number to grow in the future as more senior citizens occupy residential care facilities.

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
2019	1,018,241	1,000,610	17,630	314,420	3.18
2020	1,023,370	1,005,860	17,510	316,080	3.18
2025	1,069,810	1,050,860	18,950	335,760	3.13
2030	1,112,010	1,092,290	19,720	350,240	3.12
2035	1,151,410	1,131,090	20,320	359,090	3.15
2040	1,185,860	1,164,960	20,900	367,430	3.17
2045	1,215,730	1,194,300	21,430	374,240	3.19
2050	1,240,070	1,218,200	21,870	380,500	3.20
19-50 Chng	219,950	217,590	4,240	66,080	
19-50 CAGR	0.64%	0.64%	0.70%	0.62%	

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

There were about 314,420 households in Fresno County in 2019, with an average household size of 3.18 persons. The number of households in the County is projected to grow by 66,080, to a total of 380,500 in 2050. The average household size for the county is projected to decline over the next ten years, but then increase gradually to 3.20 by 2050.

Households in the Fresno SOI area are projected to grow by 41,664 between 2019 and 2050, going from 188,712 to 230,376 (Table 10). The Clovis SOI is projected to grow considerably as well, adding 10,257 households above the 2019 base of 44,648 households.

The household projections are based on the trends in household size shown in Table 9 above. ADE also estimated household formation, or headship, rates by major age group over the next ten years, which will be useful in the upcoming RHNA update process. Headship rates are projected to increase for the younger and older age groups but decline for the middle age groups due to the decreasing household size (Table 11). This is also based on the observed changes between the last HCD projected rates (2013 RHNA cycle) and the most recent 2018 ACS data. The 2018 data shown in Table 11 is from the ACS, and reflects jurisdictional boundaries for the cities, rather than the SOIs.

Table 10 - Household Projections by Jurisdiction, 2019-2050

JURISDICTION	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE
Fresno County	314,418	316,080	335,757	350,245	359,094	367,432	374,236	380,499	66,081
Clovis and SOI	44,648	44,839	47,930	50,150	51,546	52,856	53,928	54,905	10,257
Coalinga and SOI	3,917	3,969	4,267	4,468	4,601	4,722	4,820	4,910	993
Firebaugh and SOI	2,041	2,040	2,361	2,480	2,557	2,629	2,688	2,741	700
Fowler and SOI	1,802	1,860	1,991	2,077	2,129	2,178	2,218	2,255	453
Fresno and SOI	188,712	189,930	201,270	210,537	216,373	221,831	226,302	230,376	41,664
Huron and SOI	1,487	1,487	1,574	1,652	1,702	1,750	1,788	1,823	336
Kerman and SOI	4,014	4,034	4,494	4,707	4,841	4,967	5,070	5,164	1,150
Kingsburg and SOI	4,255	4,275	4,655	4,863	4,992	5,114	5,213	5,304	1,049
Mendota and SOI	2,676	2,687	2,880	3,012	3,095	3,173	3,236	3,295	619
Orange Cove and SOI	2,151	2,151	2,304	2,410	2,476	2,539	2,590	2,636	485
Parlier and SOI	3,389	3,414	3,620	3,789	3,896	3,997	4,079	4,154	765
Reedley and SOI	6,930	6,931	7,305	7,650	7,869	8,073	8,241	8,394	1,464
Sanger and SOI	7,811	7,840	8,338	8,721	8,961	9,186	9,371	9,539	1,728
San Joaquin and SOI	889	889	934	973	995	1,017	1,035	1,052	163
Selma and SOI	7,353	7,364	8,079	8,448	8,680	8,897	9,075	9,237	1,884
Unincorporated Areas	32,343	32,369	33,756	34,310	34,379	34,504	34,581	34,715	2,372

Source: ADE, Inc.

Table 11 - Projected Changes in Headship Rates, 2018-2030

JURISDICTION	2018 HOUSEHOLDS BY AGE OF HOUSEHOLDER			2018 POPULATION BY AGE GROUP			2018 HEADSHIP RATES			2030 PROJECTED HEADSHIP RATES		
	15-34	35-64	65+	15-34	35-64	65+	15-34	35-64	65+	15-34	35-64	65+
Fresno County	66,594	170,437	67,593	298,006	341,065	123,223	22.3%	50.0%	54.9%	22.9%	47.5%	58.2%
Clovis	7,868	20,289	8,261	36,999	48,387	17,832	21.3%	41.9%	46.3%	26.4%	49.1%	60.9%
Coalinga	1,073	2,368	705	3,720	4,755	1,431	28.8%	49.8%	49.3%	18.2%	36.9%	60.9%
Firebaugh	389	1,323	460	2,468	2,428	674	15.8%	54.5%	68.3%	15.4%	42.9%	58.5%
Fowler city	418	1,103	404	1,705	2,133	693	24.5%	51.7%	58.3%	21.1%	50.4%	53.6%
Fresno city	41,071	91,838	33,849	179,098	196,499	66,924	22.9%	46.7%	50.6%	25.1%	49.6%	58.8%
Huron city	483	1,073	215	1,888	1,820	394	25.6%	59.0%	54.6%	23.5%	46.3%	38.3%
Kerman city	934	2,107	814	4,223	4,746	1,397	22.1%	44.4%	58.3%	21.2%	43.7%	49.0%
Kingsburg city	626	2,362	973	3,749	4,743	1,898	16.7%	49.8%	51.3%	19.5%	49.9%	61.1%
Mendota city	564	1,883	293	3,568	3,772	764	15.8%	49.9%	38.3%	17.8%	44.0%	44.6%
Orange Cove	561	1,384	438	2,870	2,559	680	19.5%	54.1%	64.5%	21.3%	45.3%	52.0%
Parlier city	782	2,467	714	4,337	4,274	983	18.0%	57.7%	72.7%	16.6%	46.7%	55.0%
Reedley city	1,600	3,783	1,818	7,457	8,103	2,579	21.5%	46.7%	70.5%	20.6%	42.6%	58.0%
Sanger city	1,141	4,270	1,675	8,392	9,384	3,021	13.6%	45.5%	55.5%	17.2%	43.3%	61.3%
San Joaquin	266	686	113	1,148	1,054	246	23.2%	65.1%	46.0%	22.7%	47.4%	53.8%
Selma city	1,362	3,972	1,422	8,044	8,694	2,977	16.9%	45.7%	47.8%	18.2%	45.6%	56.5%

Source: ADE, Inc., based on 2018 ACS and HCD Regional Housing Needs Determination, Fresno COG, 2013.

AGE AND ETHNICITY

As indicated in Table 12 below, while the population as a whole is projected to grow annually by 0.64 percent between 2019 and 2050, the older age cohorts above 45 years are projected to grow at a faster rate. The number of persons between 65 and 74 is expected to grow annually by 1.1 percent, while the number of those 75 and over will grow by 2.5 percent a year. As a percentage of total population, persons 65 and over will comprise 18.1 percent of the total population in 2050, versus their current 12.7 percent share.

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

Age Group	2019	2050	19-50 Change	19-50 CAGR*	'19 Share	'50 Share
Fresno County	1,018,241	1,240,072	221,831	0.64%	100.0%	100.0%
5 and below	95,915	113,020	17,106	0.53%	9.4%	9.1%
6 to 14	139,023	156,685	17,662	0.39%	13.7%	12.6%
15 to 19	74,364	82,548	8,184	0.34%	7.3%	6.7%
20 to 24	75,470	81,703	6,233	0.26%	7.4%	6.6%
25 to 34	154,100	157,498	3,397	0.07%	15.1%	12.7%
35 to 44	128,726	146,587	17,861	0.42%	12.6%	11.8%
45 to 54	111,842	139,259	27,417	0.71%	11.0%	11.2%
55 to 64	108,972	139,208	30,235	0.79%	10.7%	11.2%
65 to 74	76,457	107,486	31,029	1.10%	7.5%	8.7%
75 and above	53,371	116,078	62,707	2.54%	5.2%	9.4%

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

Of the 1,018,250 persons in Fresno County, Latinos are the largest racial\ethnic category at 545,000 (53.5 percent of the total), with Whites-Not Latinos second at 301,680 (29.6 percent) (Table 13). The number of Latinos is projected to grow to 790,350 (45.0 percent) in 2050, or by 245,350 persons between 2019 and 2050. Whites are projected to decrease to 256,730, 44,950 below their current level.

Table 13 - Projection of Total Population by Race\Ethnicity, Fresno County: 2019 – 2050

	All	White	Latino	Black	Asian	Other
2019	1,018,250	301,680	545,000	47,650	96,110	27,810
2020	1,023,370	299,770	551,180	47,760	96,760	27,900
2025	1,069,810	295,710	594,500	48,820	101,870	28,910
2030	1,112,010	289,180	637,120	49,740	106,050	29,920
2035	1,151,390	280,910	680,130	50,270	109,280	30,800
2040	1,185,870	271,140	721,540	50,270	111,560	31,360
2045	1,215,740	263,940	757,980	49,650	112,750	31,420
2050	1,240,060	256,730	790,350	48,570	113,310	31,100
2019-2050	221,810	-44,950	245,350	920	17,200	3,290

Source: ADE

Fresno County has an estimated 213,900 school-aged children in 2019 (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 219,400 in 2050, or 21,200 more than the 2019 figure of 198,200.

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	213,900	198,200	92.7%
2020	214,400	198,500	92.6%
2025	219,000	202,000	92.2%
2030	224,500	206,300	91.9%
2035	231,200	211,700	91.6%
2040	234,400	213,800	91.2%
2045	236,100	214,600	90.9%
2050	242,300	219,400	90.5%
2015-2050 chg	28,400	21,200	
15-50 CAGR	0.4%	0.3%	

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.

HOUSING

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 66,560 new residential units over the period between 2019 and 2050. Based on recent building permit data for each city in Fresno County and California DOF E5 reports, we estimate that 43,600 (65 percent) will be single-family units, with the balance of 22,960 (35 percent) as multi-family (Table 15). This is about half as many dwelling units as was projected in 2017, due to the lower population projections currently. Also, there is a much greater trend toward multi-family housing development, due in part to higher density development in the City of Fresno and also more affordable housing being produced in other cities.

The ACS data for 2018 shows that Fresno County has a slightly lower level of home ownership than the state average and a lower vacancy rate (Table 16). Cities with higher home ownership rates include Clovis, Kingsburg, Reedley, Sanger, and Selma, while Huron, Mendota, Orange Cove, Parlier and San Joaquin have particularly high concentrations of renters.

Table 15 – Projected Market Demand for New Housing Units by Unit Building Type, 2019-2050

JURISDICTION	NEW UNITS REQUIRED 2019-2050	SFU	MFU
Fresno County	66,560	43,600	22,960
Clovis SOI	10,960	8,100	2,860
Coalinga SOI	730	400	330
Firebaugh SOI	700	500	200
Fowler SOI	410	300	110
Fresno SOI	41,300	25,300	16,000
Huron SOI	400	100	300
Kerman SOI	1,350	1,000	350
Kingsburg SOI	1,200	1,000	200
Mendota SOI	710	500	210
Orange Cove SOI	430	300	130
Parlier SOI	770	500	270
Reedley SOI	1,600	700	900
Sanger SOI	1,790	1,400	390
San Joaquin SOI	190	100	90
Selma SOI	1,920	1,400	520
Uninc. excl. SOIs	2,100	2,000	100

Source: ADE, based on US Census Construction Building Permits database (2010-2015), Calif. DOF E-5 Reports and City project data.

Future housing conditions will depend on a number of factors including vacancy rates, the level of overcrowding in households, and the ability of income growth to keep up with housing price and rent inflation. Overall vacancy rates have been declining since the height of the Great Recession in 2012 (Figure 6). More recent data from DOF indicates that the countywide rate continued to decline slightly from 6.8 percent in 2019 to 6.7 percent in 2020. Communities with vacancy rates above the county average include Coalinga (11.7 percent), Fowler (8 percent), Orange Cove (8.4 percent) and the unincorporated area (13.7 percent).

As shown in Figure 7, more than half of renter households countywide pay more than 30 percent of income on housing. While the figure of 53.6 percent in 2018 is slightly lower than the peak of 55.1 percent in 2014, the trend has been moving down very slowly, despite a significant drop in unemployment during this time. The trend for homeowners is much more positive, with the 2018 figure at 26.5, reflecting a steady downward trend from 36.8 percent in 2010. The high rental costs relative to income occur in many communities throughout the County. In 2018, only Clovis, Coalinga, Kerman, Kingsburg, San Joaquin and the unincorporated county have fewer than 50 percent of renters paying more than 30 percent of income on rent.

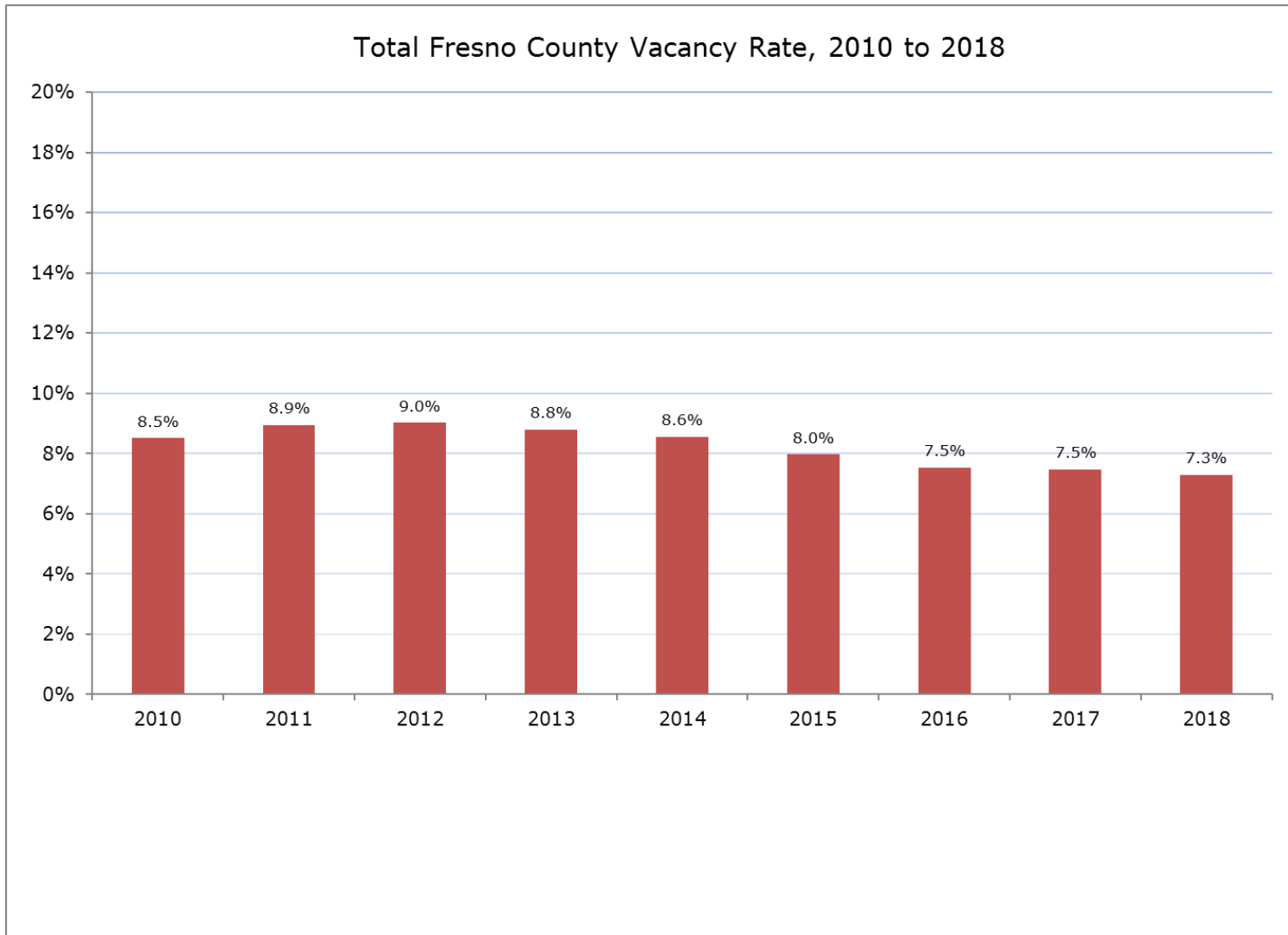
Table 16 - Housing Tenure and Vacancy Rates, California and Fresno Jurisdictions, 2018

JURISDICTION	TOTAL HOUSING UNITS	OWNER-OCCUPIED HOUSING UNITS	PERCENT OF TOTAL	VACANT OWNER-SHIP HOUSING	PERCENT OF OWNER OCCUPIED HOUSING	RENTER-OCCUPIED HOUSING UNITS	PERCENT OF TOTAL	VACANT RENTALS	PERCENT OF RENTER OCCUPIED
California	12,965,435	7,085,435	54.6%	696,342	9.8%	5,880,000	45.4%	423,047	7.2%
Fresno County	304,624	160,944	52.8%	12,673	7.9%	143,680	47.2%	11,280	7.9%
Clovis	36,418	22,269	61.1%	779	3.5%	14,149	38.9%	611	4.3%
Coalinga	4,146	2,225	53.7%	201	9.0%	1,921	46.3%	213	11.1%
Firebaugh	2,172	988	45.5%	26	2.6%	1,184	54.5%	42	3.5%
Fowler	1,925	1,022	53.1%	33	3.2%	903	46.9%	29	3.2%
Fresno	166,758	77,327	46.4%	3,917	5.1%	89,431	53.6%	7,406	8.3%
Huron	1,771	512	28.9%	0	0.0%	1,259	71.1%	117	9.3%
Kerman	3,855	2,048	53.1%	75	3.7%	1,807	46.9%	0	0.0%
Kingsburg	3,961	2,656	67.1%	38	1.4%	1,305	32.9%	90	6.9%
Mendota	2,740	963	35.1%	22	2.3%	1,777	64.9%	74	4.2%
Orange Cove	2,383	969	40.7%	17	1.8%	1,414	59.3%	139	9.8%
Parlier	3,963	1,700	42.9%	128	7.5%	2,263	57.1%	115	5.1%
Reedley	7,201	4,521	62.8%	201	4.5%	2,680	37.2%	118	4.4%
Sanger	7,086	3,932	55.5%	97	2.5%	3,154	44.5%	157	5.0%
San Joaquin	1,065	388	36.4%	35	9.0%	677	63.6%	47	7.0%
Selma	6,756	3,980	58.9%	264	6.6%	2,776	41.1%	163	5.9%
Unincorporated	52,424	35,444	67.6%	6,965	19.7%	16,980	32.4%	1,834	10.8%

Source: ACS, 2018

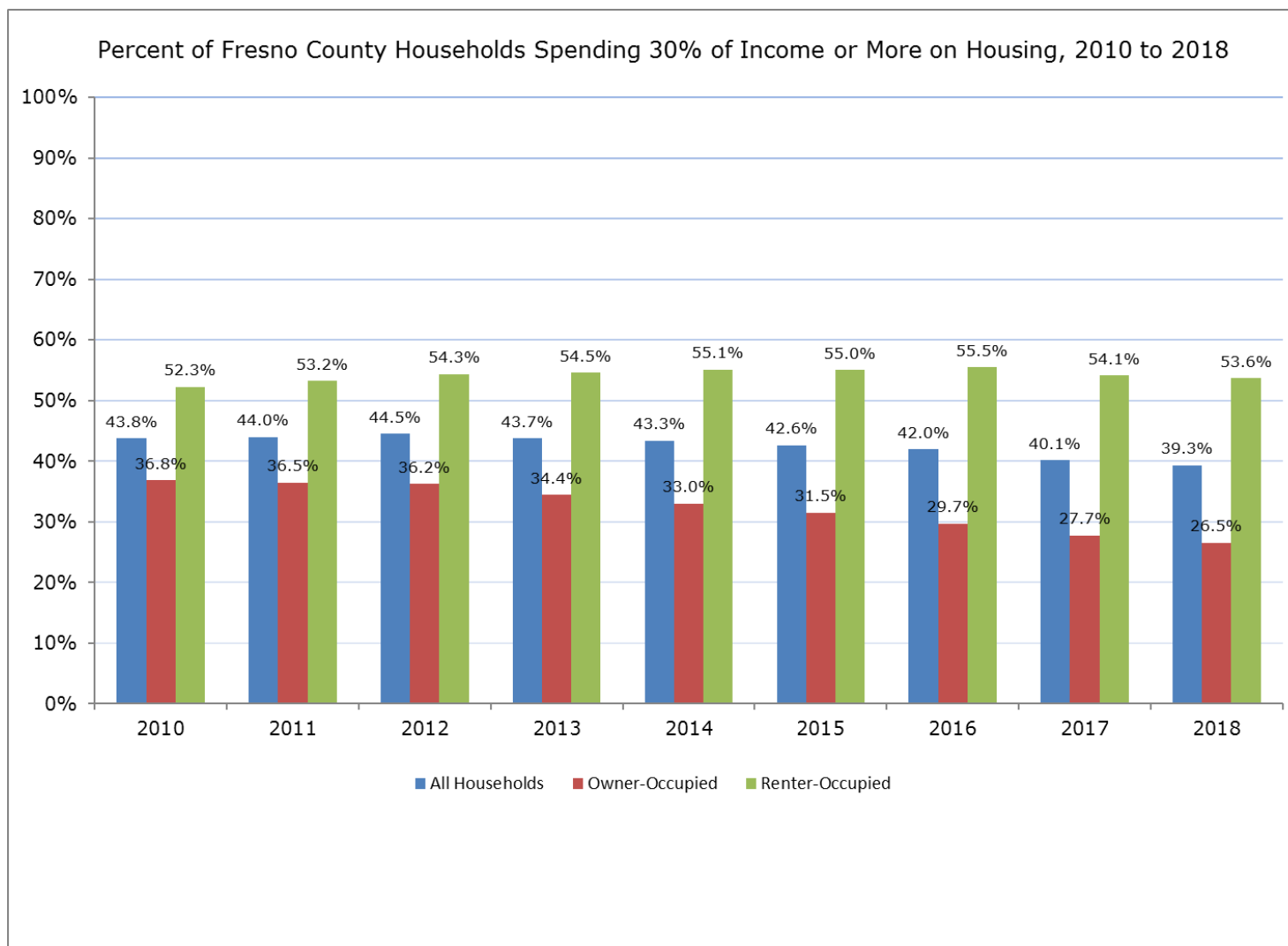
High housing costs lead to overcrowded conditions. As shown in Figure 8, home owner households have relatively few overcrowded households, holding steady at about 5 percent between 2010 and 2018. However, renter households have nearly three times the level of overcrowding. The trend has improved slightly since 2014, but we expect the loss of income due to the Covid-19 pandemic will send the trend upward again, at least in the next few years.

Figure 6 - Housing Vacancy Rate Trends



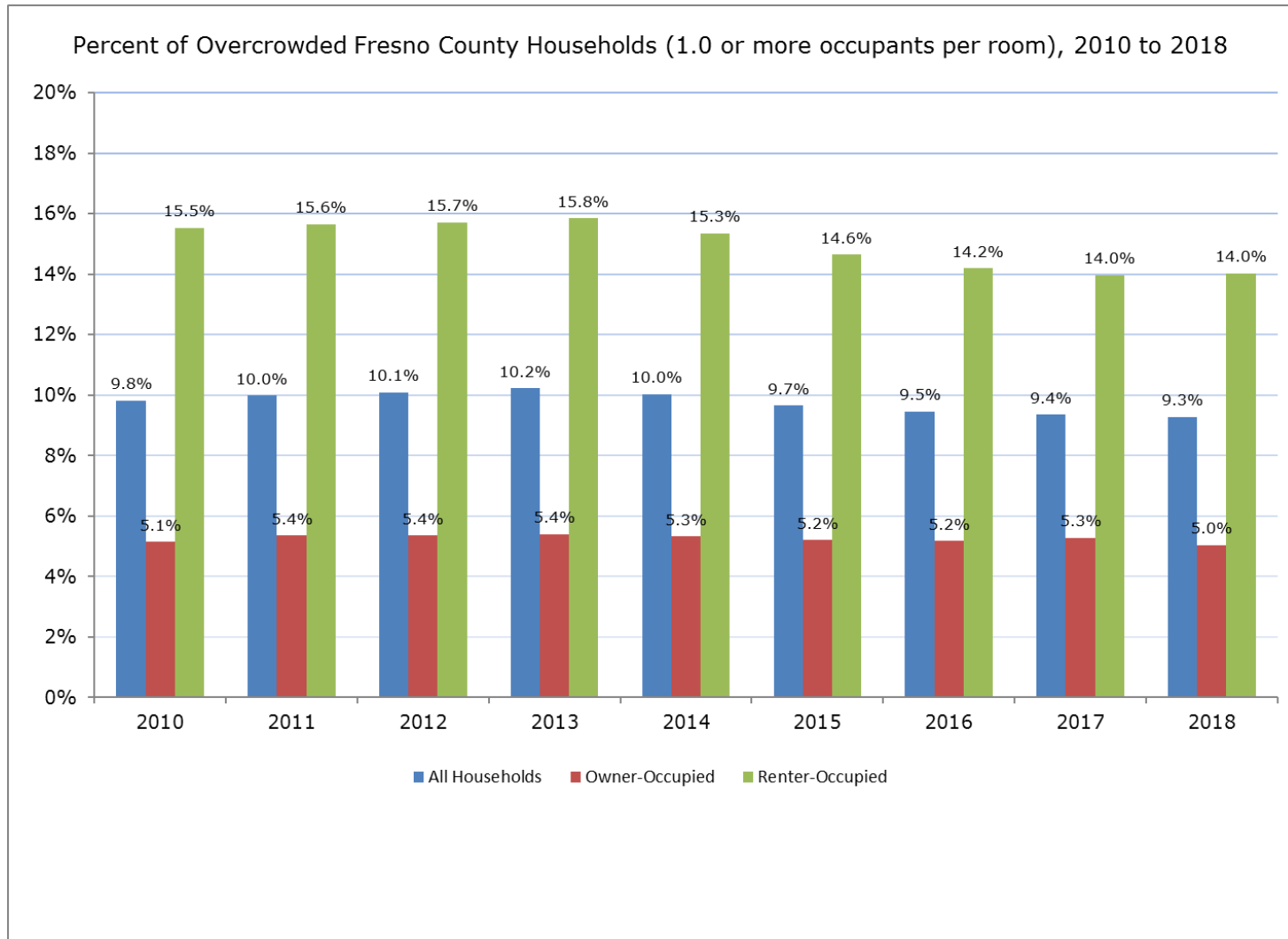
Source: ACS, Five Year Sample.

Figure 7 - Housing Affordability Trends, Fresno County, 2010-2018



Source: ACS, Five Year Sample.

Figure 8 - Overcrowded Households, Fresno County, 2010 - 2018



Source: ACS, Five Year Sample.

HOUSEHOLD INCOME

Average household incomes will decline in 2020 and 2021 due to the Covid-19 pandemic recession. However, income levels are projected to recover to 2019 levels prior to 2025. Table 17 projects the distribution of households by income category (\$2019). The longer term income growth reflects the projected growth in real wages for jobs in Fresno County, based on the 2001-2019 wage growth rates shown in Table 19. Table 18 shows the projected growth in the countywide average wage and the number of workers by annual income category, based on average wages by industry.

Table 17 – Fresno County Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	20,740	22,810	20,550	19,470	18,390	17,330	16,400	15,240
\$10,000 to \$24,999	51,640	56,800	51,500	48,950	46,410	43,920	41,710	38,950
\$25,000 to \$34,999	29,970	32,960	29,380	27,660	24,960	23,040	21,240	19,640
\$35,000 to \$49,999	43,750	47,240	44,810	45,360	41,190	38,020	35,050	32,400
\$50,000 to \$74,999	56,210	52,560	63,760	71,280	80,240	85,440	85,980	82,990
\$75,000 to \$99,999	37,580	35,140	42,620	46,620	50,040	54,140	59,620	67,900
\$100,000 to \$149,999	43,360	39,900	48,370	52,890	56,770	61,020	65,830	70,860
\$150,000 or more	31,160	28,670	34,770	38,020	41,090	44,510	48,410	52,530
Total	314,420	316,080	335,760	350,240	359,090	367,430	374,240	380,500
Mean Income	\$73,690	\$69,790	\$76,140	\$78,860	\$81,770	\$84,720	\$87,950	\$91,500
CAGR		-5.3%	1.8%	0.7%	0.7%	0.7%	0.8%	0.8%

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

Table 18 - Jobs By Income Category And Countywide Average Wage, Five Year Intervals

INCOME CATEGORY	2019	2020	2025	2030	2035	2040	2045	2050
\$0-\$19,999	31,898	21,146	0	0	0	0	0	0
\$20,000-\$39,999	73,408	64,789	108,754	112,094	102,234	104,758	84,200	85,200
\$40,000-\$59,999	220,301	211,369	227,202	234,171	227,400	186,600	213,923	218,331
\$60,000-\$79,999	74,883	72,976	77,808	76,722	105,476	155,189	147,446	149,990
\$80,000-\$99,999	2,310	2,121	0	4,300	4,400	4,500	11,122	11,122
\$100,000+	2,500	2,800	5,036	5,113	5,290	5,453	10,109	10,358
Total Jobs	405,300	375,200	418,800	432,400	444,800	456,500	466,800	475,000
Average Wage (\$2019)	\$46,117	\$43,634	\$47,404	\$49,047	\$50,841	\$52,754	\$54,775	\$56,966
Annual Growth in Wages		-5.4%	1.7%	0.7%	0.7%	0.7%	0.8%	0.8%

Source: ADE, Inc.

Table 19 - Annual Wage Growth by Industry, Fresno County 2001-2019, (Constant 2019 Dollars)

INDUSTRY	2001-2019 ANNUAL GROWTH RATE
All Industries	0.6%
Agriculture, Forestry, Fishing and Hunting	2.2%
Mining, Quarrying, and Oil and Gas Extraction	3.4%
Utilities	2.2%
Construction	0.9%
Manufacturing	0.5%
Wholesale Trade	0.4%
Retail Trade	-0.3%
Transportation and Warehousing	-0.4%
Information	1.6%
Finance and Insurance	0.7%
Real Estate and Rental and Leasing	1.6%
Professional, Scientific, and Technical Services	0.5%
Management of Companies and Enterprises	3.0%
Administrative and Support, Waste Mgmt and Remediation	0.8%
Educational Services	0.1%
Health Care and Social Assistance	-0.3%
Arts, Entertainment, and Recreation	0.3%
Accommodation and Food Services	1.1%
Other Services (except Public Administration)	1.8%
Public Administration	0.5%

Source: ADE Inc., based on data from Chmura Jobs EQ.

FUTURE HOUSING CONDITIONS

FCOG has requested guidance on several housing market indicators in anticipation of the upcoming RHNA cycle. The following discussion provides qualitative analysis of likely conditions over the next ten years based on the recent ACS data portrayed in Figures 6-8 and projected values for household income and housing production.

Overcrowded Households. Figure 8 shows that overcrowding in Fresno County generally increased during the Great Recession but has been declining since 2014. Overcrowding is correlated to household income and is also affected by trends in household size. During the 2014 to 2018 period, average household income increased by 1.4 percent per year, as jobs became more plentiful during the recovery. However, with the current recession, household incomes will decline again over the next two years and between 2019 and 2025 are projected to increase only 0.5 percent per year, despite a 1.8 percent growth rate coming out of the 2020 trough. The growth rate would then settle at 0.7

percent per year between 2025 and 2030. Therefore, we anticipate that overcrowding will reverse recent trends and begin to increase again to levels previously seen in 2013. The average household size is projected to decrease from 3.18 to 3.12 by 2030 and then increase to 3.15 in 2035. This may help slow the rate of increase in overcrowding slightly. In addition, rapid production of new housing would help to mitigate the trend of lower household incomes on housing conditions (see discussion below under vacancy rates).

Housing Cost Burden. Similar to overcrowding, the percent of households paying more than 30 percent of income for housing declined slightly between 2014 and 2018. However, with the projected slowing in household income, it is likely this trend will also reverse and more households will experience higher housing cost burdens. As noted above, rapid housing production could mitigate this concern to some degree, as discussed below under vacancy rates.

Housing Vacancy Rates. Figure 6 shows that countywide vacancy rates have been declining, which is also supported by the annual DOF E-5 reports. The housing projections in this report stipulate an optimal 5 percent vacancy rate for both ownership and rental housing in most of the communities, with slightly lower rates in Fresno and Clovis. About half the cities currently have vacancy rates below five percent and the housing unit projections between 2019 and 2030 are 5.6 percent higher than the household projections, to provide additional housing in these communities. If these projections are realized, then the additional supply of housing may help to reduce housing cost inflation and overcrowding in these communities. However, other communities already have high vacancy rates and may see lower housing production as a result. The projected total housing units between 2019 and 2050 are only 0.7 percent above the projected growth in households, due to this phenomenon of equalizing the vacancy rates within each community.

Affordable Housing. The need for affordable housing will increase under the conditions described above. The mix of projected housing shows an increase in the share of multi-family housing, which would be consistent with increased affordable housing production. However, the actual production of affordable housing will be dependent on available funding.

Assisted Living Units. The aging of the population is projected to continue throughout this 2050 projection period. Therefore, we would expect to see significant addition of assisted living facilities in Fresno County. ADE projects an increase in the share of population living in group quarters, in part to account for the increasing senior population. This is consistent also with the job projections for health care, a major portion of which is for residential care facilities.

EMPLOYMENT PROJECTIONS

Total jobs in Fresno County are projected to increase by 69,700 jobs, from 405,300 in 2019 to 475,000 in 2050 (Table 20). This reflects a 0.5 percent compound annual growth rate (CAGR) over the entire period. The current recession has created a loss of jobs in 2020 and we project 2019 jobs levels to be recovered by 2022. Growth levels would stabilize at 0.6 percent per year between 2025 and 2035 and then begin to decline further out in time. The declines are due in part to slow growth in

agriculture due to water shortages among other factors and declining food manufacturing levels. Also, the lower population growth forecast results in slower growth in local serving job sectors such as retail, education and government. Health care shows the highest growth rate, followed by non-manufacturing industrial sectors and office jobs.

Table 20 – Fresno County Employment Projections by Sector, 2015-2050

JOB SECTOR	2019	2020	2025	2030	2035	2040	2045	2050	CAGR
Agriculture	44,000	41,000	44,300	45,100	45,600	46,000	46,100	46,000	0.1%
Mfg./Mining	26,500	24,700	26,500	26,500	26,500	26,400	26,100	25,800	-0.1%
Other Industrial	62,000	56,000	63,800	66,600	69,400	71,900	74,300	76,600	0.7%
Retail	38,600	36,000	40,100	41,400	42,500	43,500	44,400	44,900	0.5%
Office	51,000	47,800	53,800	55,500	57,200	58,700	60,100	60,900	0.6%
Education	43,100	43,200	43,900	45,400	46,800	47,800	48,900	49,400	0.4%
Health Services	68,800	66,900	73,600	77,100	80,100	83,500	87,000	90,500	0.9%
Hospitality	35,600	23,600	36,300	37,300	38,200	39,200	39,800	40,300	0.4%
Government	35,700	36,000	36,500	37,500	38,500	39,500	40,100	40,600	0.4%
Total	405,300	375,200	418,800	432,400	444,800	456,500	466,800	475,000	0.5%
Total CAGR		-7.4%	2.2%	0.6%	0.6%	0.5%	0.4%	0.3%	

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

Table 21 shows the total jobs projections for the Spheres of Influence (SOI) for each of the cities plus the unincorporated county area. 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 Clovis in particular will increase its share 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 and a number of these cities have growth rates higher than the county average, as shown in Figure 9.

Figure 9 - Projected Percent Growth in Jobs by Jurisdiction, 2019-2050

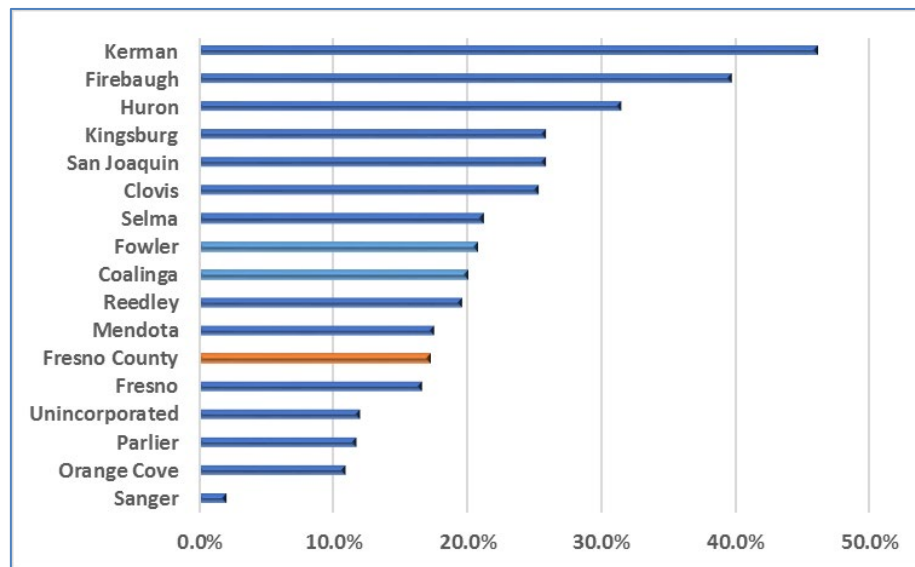


Table 21 - ADE Employment Projections by City, 2019-2050

Jurisdiction	2019	2020	2025	2030	2035	2040	2045	2050	2019 Share	2050 Share
County	405,300	375,200	418,800	432,400	444,800	456,500	466,800	475,000	100.0%	100.0%
Clovis	36,060	33,260	36,890	38,770	40,540	42,240	43,820	45,200	8.9%	9.5%
Coalinga	2,700	2,540	2,930	3,000	3,070	3,140	3,190	3,240	0.7%	0.7%
Firebaugh	1,160	1,090	1,230	1,310	1,390	1,470	1,550	1,620	0.3%	0.3%
Fowler	2,990	2,740	3,440	3,490	3,530	3,570	3,590	3,610	0.7%	0.8%
Fresno	257,140	237,950	264,140	272,810	280,710	288,170	294,730	299,960	63.4%	63.1%
Huron	1,240	1,180	1,470	1,510	1,540	1,570	1,600	1,630	0.3%	0.3%
Kerman	2,800	2,590	3,690	3,780	3,870	3,960	4,030	4,090	0.7%	0.9%
Kingsburg	3,750	3,490	4,400	4,490	4,560	4,620	4,680	4,720	0.9%	1.0%
Mendota	910	840	940	970	1,000	1,020	1,050	1,070	0.2%	0.2%
Orange Cove	640	600	630	650	670	680	700	710	0.2%	0.1%
Parlier	2,300	2,150	2,210	2,300	2,380	2,450	2,510	2,570	0.6%	0.5%
Reedley	5,820	5,390	6,730	6,810	6,880	6,890	6,940	6,960	1.4%	1.5%
Sanger SOI	5,570	5,150	5,620	5,930	6,220	6,500	6,760	7,010	1.4%	1.5%
San Joaquin SOI	480	440	410	430	450	460	480	490	0.1%	0.1%
Selma	6,540	6,090	7,400	7,530	7,660	7,770	7,860	7,930	1.6%	1.7%
Incorporated	330,100	305,500	342,130	353,780	364,470	374,510	383,490	390,810	81.4%	82.3%
Balance	75,200	69,700	76,670	78,620	80,350	81,980	83,320	84,210	18.6%	17.7%

Source: ADE, Inc.

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. A more complete description of the underlying methodology may be found in the Fresno COG Projections 2015-2050 Report published in 2017.

CA Employment Development Department (EDD). Data includes historical labor force and wage and salary jobs by industry from 1990 to 2019 actual from the Census of Employment and Wages (CEW). ADE used the 2019 countywide figures as the baseline for our employment projections and the COG SOI data as the baseline for city projections.

CA Department of Finance (DOF). ADE used the 2019 and 2020 total population estimates as the baseline for the population projections. DOF provides population projections 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 2040. 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 2019 extend to 2050 and provide a wide range of indicators including employment by major industry group, population, housing and economic output.

Woods and Poole (W&P). W&P is an independent economic forecasting firm that 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 2020 projections were just released in April 2020 and extend to 2060, 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 basis for projected economic growth in the county.

Chmura JobsEQ. Chmura is a national economic forecasting firm that provides detailed historical and projected employment data by county. Chmura has prepared detailed forecast of the effect of the Covid-19 pandemic recession, which ADE has used in one scenario of possible jobs growth in Fresno County over the next two years.

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.

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 22 – Job Projections for Clovis SOI by Sector, 2019-2050

JOB SECTOR	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	380	350	380	390	390	390	400	390
Mfg./Mining	3,430	3,395	3,441	3,440	3,440	3,430	3,390	3,350
Other Industrial	4,810	4,543	4,814	5,130	5,440	5,740	6,020	6,300
Retail	5,850	5,454	5,896	6,290	6,640	6,990	7,310	7,560
Office	5,000	4,991	5,608	6,000	6,390	6,770	7,130	7,390
Education	3,280	3,292	3,189	3,420	3,600	3,770	3,930	4,100
Health Services	6,870	6,776	6,902	7,260	7,600	7,910	8,180	8,430
Hospitality	5,640	3,641	5,818	5,960	6,130	6,300	6,480	6,680
Government	810	819	842	880	920	940	970	1,010
Total	36,060	33,260	36,890	38,770	40,540	42,240	43,820	45,200

Source: ADE, Inc.

Table 23 – Population Projections for City of Clovis SOI: 2019-2050

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	134,210	134,780	141,700	147,760	153,420	158,370	162,660	166,160	31,950	0.7%
Tot. Nos. of Persons in Group Qtrs.	590	590	640	670	700	720	740	760	170	0.8%
Tot. Nos. of Persons in HHs	133,620	134,190	141,060	147,090	152,720	157,650	161,920	165,400	31,780	0.7%
Tot. Nos. of HHs	44,650	44,840	47,930	50,150	51,550	52,860	53,930	54,900	10,250	0.7%
Persons Per Households	2.99	2.99	2.94	2.93	2.96	2.98	3.00	3.01		

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

Table 24 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	3,280	5,500	6,900	8,210	9,280	10,250
Total Number of New Units Required By Period	4,110	6,268	7,713	9,036	10,140	10,960

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

Table 25 – Projections of Total Number of Persons in City of Clovis by Age

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
City of Clovis SOI	134,213	134,781	141,701	147,763	153,419	158,372	162,663	166,157	31,944	0.69%	100.0%	100.0%
5 and below	11,018	11,071	11,664	12,028	12,132	12,206	13,515	14,038	3,020	0.78%	8.2%	8.4%
6 to 14	16,248	16,075	16,522	17,377	18,158	18,550	18,530	19,480	3,232	0.59%	12.1%	11.7%
15 to 19	9,943	9,731	9,123	9,145	9,641	10,165	10,412	10,376	432	0.14%	7.4%	6.2%
20 to 24	10,111	10,157	9,866	9,219	9,265	9,778	10,228	10,440	329	0.10%	7.5%	6.3%
25 to 34	18,147	18,502	20,191	20,354	19,422	18,850	19,275	20,102	1,955	0.33%	13.5%	12.1%
35 to 44	16,351	16,238	17,148	18,863	20,570	20,813	19,726	18,929	2,578	0.47%	12.2%	11.4%
45 to 54	16,826	16,582	16,373	16,363	17,272	19,073	20,656	20,663	3,836	0.66%	12.5%	12.4%
55 to 64	16,539	16,679	16,748	16,299	16,084	16,140	16,927	18,489	1,950	0.36%	12.3%	11.1%
65 to 74	11,519	12,023	13,978	15,440	15,488	15,164	14,861	14,760	3,241	0.80%	8.6%	8.9%
75 and above	7,509	7,723	10,087	12,675	15,387	17,633	18,533	18,881	11,371	3.02%	5.6%	11.4%

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

Table 26 – Projections of Total Number of Persons in Clovis by Race and Ethnicity, Clovis SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Clovis SOI	134,213	134,781	141,701	147,763	153,419	158,372	162,663	166,157	31,944	0.69%	100.0%	100.0%
White	74,557	74,471	76,188	77,206	77,775	77,743	77,844	77,588	3,030	0.13%	55.6%	46.7%
Latino	37,955	38,482	42,384	46,227	50,171	54,189	57,842	61,345	23,390	1.56%	28.3%	36.9%
Black	3,034	3,043	3,178	3,283	3,365	3,415	3,409	3,365	331	0.33%	2.3%	2.0%
Asian	13,306	13,396	14,232	15,009	15,771	16,450	16,878	17,133	3,827	0.82%	9.9%	10.3%
Pacific Islander	266	268	284	298	311	321	326	331	65	0.71%	0.2%	0.2%
Native American	1,019	1,017	1,032	1,029	1,016	990	945	891	-127	-0.43%	0.8%	0.5%
Other	211	211	220	228	234	235	234	231	20	0.29%	0.2%	0.1%
Two or more	3,865	3,894	4,183	4,482	4,778	5,030	5,185	5,273	1,408	1.01%	2.9%	3.2%

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

Table 27 – Clovis Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	1,450	1,730	1,380	1,230	1,070	910	780	690
\$10,000 to \$24,999	3,740	4,450	3,560	3,180	2,760	2,350	2,000	1,780
\$25,000 to \$34,999	5,120	6,140	5,170	4,590	3,670	2,580	1,560	820
\$35,000 to \$49,999	4,120	4,310	4,820	4,840	4,700	4,590	4,020	2,110
\$50,000 to \$74,999	7,230	6,800	7,540	8,450	9,420	10,290	11,030	12,030
\$75,000 to \$99,999	5,550	5,220	5,840	6,400	6,850	7,350	7,970	9,070
\$100,000 to \$149,999	10,490	9,730	11,800	12,910	13,820	14,830	15,910	16,960
\$150,000 or more	6,950	6,450	7,830	8,560	9,250	9,940	10,660	11,450
Total	44,650	44,840	47,930	50,150	51,550	52,860	53,930	54,900
Mean Income	\$95,940	\$90,750	\$98,580	\$102,040	\$105,790	\$109,640	\$113,820	\$118,470
CAGR		-5.4%	1.7%	0.7%	0.7%	0.7%	0.8%	0.8%

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

COALINGA

Table 28 – Job Projections for Coalinga SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	20	20	30	30	30	30	30	30
Mfg./Mining	30	30	145	150	150	150	150	150
Other Industrial	170	160	190	200	210	210	220	230
Retail	320	300	343	360	370	370	380	390
Office	190	180	200	210	210	220	230	230
Education	970	970	960	980	990	1,010	1,010	1,020
Health Services	360	350	442	450	470	480	490	510
Hospitality	320	210	300	300	310	310	320	330
Government	320	320	320	330	340	350	350	360
Total	2,700	2,540	2,930	3,000	3,070	3,140	3,190	3,240

Source: ADE, Inc.

Table 29 – Population Projections: 2019-2050: City of Coalinga SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	13,530	13,690	14,570	15,210	15,800	16,320	16,770	17,140	3,610	0.8%
Tot. Nos. of Persons in Group Qtrs.	2,220	2,220	2,450	2,560	2,640	2,730	2,800	2,860	640	0.8%
Tot. Nos. of Persons in HHs	11,310	11,470	12,120	12,650	13,160	13,590	13,970	14,280	2,970	0.8%
Tot. Nos. of HHs	3,920	3,970	4,270	4,470	4,600	4,720	4,820	4,910	990	0.7%
Persons Per Households	2.89	2.89	2.84	2.83	2.86	2.88	2.90	2.91		

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

Table 30 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	350	550	680	800	900	990
Total Number of New Units Required By Period	368	503	578	644	709	734

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

Table 31 – Projections of Total Number of Persons by Age: Coalinga SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Coalinga SOI	13,532	13,686	14,568	15,206	15,801	16,323	16,774	17,142	3,610	0.77%	100.0%	100.0%
5 and below	1,185	1,208	1,297	1,331	1,354	1,384	1,498	1,565	380	0.90%	8.8%	9.1%
6 to 14	1,720	1,724	1,762	1,900	1,983	2,027	2,053	2,149	429	0.72%	12.7%	12.5%
15 to 19	951	921	1,005	946	1,038	1,097	1,120	1,128	177	0.55%	7.0%	6.6%
20 to 24	936	959	935	1,006	949	1,042	1,094	1,112	176	0.56%	6.9%	6.5%
25 to 34	2,066	2,089	2,046	1,909	1,946	1,963	1,988	2,118	52	0.08%	15.3%	12.4%
35 to 44	1,699	1,710	1,920	2,113	2,046	1,913	1,940	1,937	238	0.42%	12.6%	11.3%
45 to 54	1,652	1,619	1,697	1,710	1,898	2,093	2,018	1,869	217	0.40%	12.2%	10.9%
55 to 64	1,724	1,777	1,619	1,578	1,636	1,652	1,824	1,993	268	0.47%	12.7%	11.6%
65 to 74	1,039	1,079	1,464	1,622	1,463	1,437	1,484	1,482	443	1.15%	7.7%	8.6%
75 and above	560	599	822	1,093	1,488	1,714	1,755	1,790	1,230	3.82%	4.1%	10.4%

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

Table 32 – Projections of Total Number of Persons by Race and Ethnicity: Coalinga SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Coalinga SOI	13,532	13,686	14,568	15,206	15,801	16,323	16,774	17,142	3,610	0.77%	100.0%	100.0%
White	4,667	4,669	4,704	4,628	4,509	4,344	4,197	4,041	-626	-0.46%	34.5%	23.6%
Latino	7,743	7,886	8,705	9,426	10,165	10,885	11,529	12,111	4,368	1.45%	57.2%	70.7%
Black	464	463	452	425	392	354	315	264	-200	-1.81%	3.4%	1.5%
Asian	399	406	437	455	465	470	468	469	71	0.53%	2.9%	2.7%
Pacific Islander	19	19	19	18	17	16	14	13	-7	-1.37%	0.1%	0.1%
Native American	75	75	73	69	64	58	52	45	-30	-1.61%	0.6%	0.3%
Other	9	9	9	8	8	7	7	5	-3	-1.53%	0.1%	0.0%
Two or more	156	158	169	176	183	189	192	194	37	0.69%	1.2%	1.1%

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

Table 33 – Coalinga Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	430	470	420	400	370	350	320	280
\$10,000 to \$24,999	500	550	490	470	430	400	340	300
\$25,000 to \$34,999	400	440	390	370	340	310	260	230
\$35,000 to \$49,999	220	240	220	230	220	200	170	140
\$50,000 to \$74,999	740	760	920	1,010	1,090	1,130	1,210	1,200
\$75,000 to \$99,999	480	450	550	600	650	700	760	880
\$100,000 to \$149,999	680	620	750	830	890	970	1,040	1,120
\$150,000 or more	470	430	520	570	620	660	710	770
Total	3,920	3,970	4,270	4,470	4,600	4,720	4,820	4,910
Mean Income	\$81,850	\$77,210	\$84,540	\$87,520	\$90,620	\$93,980	\$97,720	\$101,880
CAGR		-5.7%	1.8%	0.7%	0.7%	0.7%	0.8%	0.8%

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

FIREBAUGH

Table 34 – Job Projections for Firebaugh SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	80	70	80	80	80	80	80	80
Mfg./Mining	20	10	20	20	20	20	20	20
Other Industrial	430	410	460	490	510	530	560	580
Retail	90	80	80	90	100	110	120	130
Office	50	50	50	60	70	80	90	90
Education	240	240	280	290	300	320	330	350
Health Services	140	140	140	150	160	180	190	200
Hospitality	70	50	70	80	90	90	100	100
Government	50	50	50	50	60	60	60	70
Total	1,160	1,090	1,230	1,310	1,390	1,470	1,550	1,620

Source: ADE, Inc

Table 35 – Population Projections: 2019-2050: Firebaugh SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2015	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	7,720	7,720	8,790	9,200	9,580	9,920	10,210	10,450	2,730	1.0%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	NA
Tot. Nos. of Persons in HHs	7,720	7,720	8,790	9,200	9,580	9,920	10,210	10,450	2,730	1.0%
Tot. Nos. of HHs	2,040	2,040	2,360	2,480	2,560	2,630	2,690	2,740	700	1.0%
Persons Per Households	3.78	3.78	3.72	3.71	3.74	3.77	3.80	3.81		

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

Table 36 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	320	440	520	590	650	700
Total Number of New Units Required By Period	354	466	539	605	661	700

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

Table 37 –Projections of Total Number of Persons by Age: Firebaugh SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Firebaugh SOI	7,725	7,725	8,792	9,202	9,585	9,920	10,210	10,447	2,722	0.98%	100.0%	100.0%
5 and below	829	832	942	957	952	967	1,002	1,038	209	0.73%	10.7%	9.9%
6 to 14	1,143	1,133	1,249	1,345	1,389	1,393	1,394	1,424	281	0.71%	14.8%	13.6%
15 to 19	655	636	683	646	717	748	755	744	90	0.42%	8.5%	7.1%
20 to 24	680	653	673	669	635	703	732	736	55	0.25%	8.8%	7.0%
25 to 34	1,221	1,260	1,452	1,336	1,304	1,266	1,295	1,381	160	0.40%	15.8%	13.2%
35 to 44	833	828	1,017	1,303	1,392	1,282	1,246	1,202	369	1.19%	10.8%	11.5%
45 to 54	852	847	853	848	966	1,239	1,318	1,205	353	1.13%	11.0%	11.5%
55 to 64	792	799	884	849	793	788	895	1,140	348	1.18%	10.2%	10.9%
65 to 74	436	451	653	755	776	747	695	685	249	1.47%	5.6%	6.6%
75 and above	284	286	387	495	661	787	878	892	607	3.76%	3.7%	8.5%

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

Table 38 – Projections of Total Number of Persons by Race and Ethnicity: Firebaugh SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Firebaugh SOI	7,725	7,725	8,792	9,202	9,585	9,920	10,210	10,447	2,722	0.98%	100.0%	100.0%
White	503	496	523	510	495	481	467	453	-51	-0.34%	6.5%	4.3%
Latino	7,156	7,165	8,204	8,631	9,033	9,386	9,695	9,951	2,795	1.07%	92.6%	95.2%
Black	20	20	19	18	16	15	13	12	-9	-1.75%	0.3%	0.1%
Asian	29	29	30	28	26	25	23	21	-9	-1.13%	0.4%	0.2%
Pacific Islander	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Native American	16	16	16	15	14	13	12	11	-5	-1.11%	0.2%	0.1%
Other	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%

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

Table 39 – Firebaugh Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	170	180	180	170	170	160	160	160
\$10,000 to \$24,999	400	420	420	410	400	390	380	370
\$25,000 to \$34,999	410	440	430	420	410	400	390	380
\$35,000 to \$49,999	270	280	350	390	380	370	360	350
\$50,000 to \$74,999	500	450	610	690	750	800	830	820
\$75,000 to \$99,999	100	90	120	130	140	160	180	200
\$100,000 to \$149,999	130	120	160	180	190	220	250	290
\$150,000 or more	70	60	90	100	110	120	140	170
Total	2,040	2,040	2,360	2,480	2,560	2,630	2,690	2,740
Mean Income	\$50,830	\$48,030	\$52,680	\$54,430	\$56,390	\$58,670	\$61,270	\$64,050
CAGR		-5.5%	1.9%	0.7%	0.7%	0.8%	0.9%	0.9%

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

FOWLER

Table 40 – Job Projections for Fowler SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2015	2020	2025	2030	2035	2040	2045	2050
Agriculture	250	230	250	250	260	260	260	260
Mfg./Mining	920	860	940	940	940	940	930	930
Other Industrial	740	670	860	890	910	930	940	950
Retail	220	200	280	280	280	290	290	290
Office	150	140	200	200	200	200	200	200
Education	250	250	301	300	300	310	310	320
Health Services	300	290	420	430	440	450	450	460
Hospitality	120	80	156	160	160	160	170	170
Government	30	30	33	30	40	40	40	40
Total	2,990	2,740	3,440	3,490	3,530	3,570	3,590	3,610

Source: ADE, Inc.

Table 41 – Population Projections: 2019-2050: Fowler SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	6,380	6,580	6,930	7,200	7,460	7,680	7,870	8,030	1,650	0.7%
Tot. Nos. of Persons in Group Qtrs.	40	40	40	40	50	40	40	40	0	0.0%
Tot. Nos. of Persons in HHs	6,340	6,540	6,890	7,160	7,410	7,640	7,830	7,990	1,650	0.7%
Tot. Nos. of HHs	1,800	1,860	1,990	2,080	2,130	2,180	2,220	2,260	460	0.7%
Persons Per Household	3.52	3.52	3.46	3.44	3.48	3.50	3.53	3.54		

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

Table 42 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	190	280	330	380	420	460
Total Number of New Units Required By Period	182	247	291	341	383	414

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

Table 43 – Projections of Total Number of Persons by Age: Fowler SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fowler SOI	6,375	6,580	6,928	7,202	7,457	7,680	7,874	8,032	1,656	0.75%	100.0%	100.0%
5 and below	624	641	650	651	659	688	731	753	130	0.61%	9.8%	9.4%
6 to 14	872	879	947	962	968	969	992	1,041	169	0.57%	13.7%	13.0%
15 to 19	460	498	466	516	529	531	527	532	72	0.47%	7.2%	6.6%
20 to 24	491	497	498	462	512	524	523	519	28	0.18%	7.7%	6.5%
25 to 34	882	904	977	985	948	960	1,015	1,022	140	0.48%	13.8%	12.7%
35 to 44	824	846	836	893	959	965	922	927	103	0.38%	12.9%	11.5%
45 to 54	747	772	804	828	812	867	923	922	175	0.68%	11.7%	11.5%
55 to 64	711	732	753	738	764	784	765	811	100	0.43%	11.2%	10.1%
65 to 74	430	459	580	662	675	661	681	694	264	1.56%	6.7%	8.6%
75 and above	334	352	417	504	632	732	794	810	476	2.89%	5.2%	10.1%

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

Table 44 – Projections of Total Number of Persons by Race and Ethnicity: Fowler SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fowler SOI	6,375	6,580	6,928	7,202	7,457	7,680	7,874	8,032	1,656	0.75%	100.0%	100.0%
White	1,156	1,178	1,168	1,142	1,112	1,078	1,057	1,032	-124	-0.36%	18.1%	12.8%
Latino	4,473	4,639	4,997	5,298	5,586	5,851	6,086	6,296	1,823	1.11%	70.2%	78.4%
Black	74	74	69	64	58	51	45	39	-35	-2.04%	1.2%	0.5%
Asian	567	580	588	597	606	611	605	592	26	0.14%	8.9%	7.4%
Pacific Islander	1	1	1	1	1	1	0	0	-1	-4.36%	0.0%	0.0%
Native American	25	25	24	23	21	19	17	14	-11	-1.80%	0.4%	0.2%
Other	5	5	5	4	3	3	2	1	-4	-3.98%	0.1%	0.0%
Two or more	76	77	75	73	70	66	62	57	-19	-0.92%	1.2%	0.7%

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

Table 45 – Fowler Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2015	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	130	150	140	130	120	120	110	100
\$10,000 to \$24,999	270	310	270	260	250	230	220	200
\$25,000 to \$34,999	160	180	160	160	140	130	120	110
\$35,000 to \$49,999	220	250	220	220	200	180	170	150
\$50,000 to \$74,999	350	330	410	450	490	510	500	480
\$75,000 to \$99,999	250	240	300	330	350	380	420	480
\$100,000 to \$149,999	270	250	310	340	360	400	430	470
\$150,000 or more	150	140	180	190	210	230	260	280
Total	1,800	1,860	1,990	2,080	2,130	2,180	2,220	2,260
Mean Income	\$72,270	\$68,380	\$74,920	\$77,560	\$80,410	\$83,690	\$87,140	\$90,880
CAGR		-5.4%	1.8%	0.7%	0.7%	0.8%	0.8%	0.8%

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

FRESNO

Table 46 – Job Projections for Fresno SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	1,310	1,220	1,330	1,350	1,370	1,380	1,380	1,380
Mfg./Mining	13,880	14,210	15,531	15,530	15,530	15,470	15,300	15,120
Other Industrial	43,320	37,830	45,686	47,700	49,650	51,360	52,610	53,770
Retail	25,510	23,690	26,600	27,290	27,840	28,320	28,730	28,840
Office	41,730	39,020	43,419	44,180	44,910	45,530	45,970	46,160
Education	26,100	26,060	26,145	27,110	28,070	28,650	29,370	29,510
Health Services	53,640	52,060	53,640	56,500	58,900	61,740	64,760	67,830
Hospitality	23,220	15,300	23,417	23,940	24,390	24,820	25,240	25,570
Government	28,420	28,560	28,372	29,210	30,040	30,910	31,380	31,770
Total	257,140	237,950	264,140	272,810	280,710	288,170	294,730	299,960

Source: ADE, Inc.

Table 47 – Population Projections: 2019-2050: Fresno SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	592,350	596,060	621,540	647,980	672,650	694,240	712,960	728,200	135,850	0.7%
Tot. Nos. of Persons in Group Qtrs.	10,290	10,240	11,060	11,550	11,920	12,300	12,640	12,910	2,620	0.7%
Tot. Nos. of Persons in HHs	582,060	585,820	610,480	636,430	660,730	681,940	700,320	715,290	133,230	0.7%
Tot. Nos. of HHs	188,710	189,930	201,270	210,540	216,370	221,830	226,300	230,380	41,670	0.6%
Persons Per Household	3.08	3.08	3.03	3.02	3.05	3.07	3.09	3.10		

Source: ADE

Table 48 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	12,560	21,830	27,660	33,120	37,590	41,670
Total Number of New Units Required By Period	14,262	22,818	28,431	33,715	38,084	41,318

Source: ADE

Table 49 – Projections of Total Number of Persons by Age: Fresno SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fresno SOI	592,347	596,063	621,543	647,980	672,647	694,243	712,956	728,195	135,848	0.67%	100.0%	100.0%
5 and below	58,273	58,439	58,828	58,696	59,001	60,303	64,286	66,214	7,941	0.41%	9.8%	9.1%
6 to 14	83,953	84,024	84,560	87,186	87,674	87,664	88,278	91,775	7,822	0.29%	14.2%	12.6%
15 to 19	42,714	43,006	46,630	45,766	47,987	48,451	48,049	47,834	5,120	0.37%	7.2%	6.6%
20 to 24	42,871	42,373	42,504	46,360	45,569	47,709	47,902	47,331	4,460	0.32%	7.2%	6.5%
25 to 34	94,430	93,514	87,991	83,821	88,165	91,119	91,878	93,567	-863	-0.03%	15.9%	12.8%
35 to 44	78,441	80,389	89,292	91,479	86,720	82,622	86,295	88,359	9,918	0.38%	13.2%	12.1%
45 to 54	62,899	62,832	67,327	77,816	87,074	89,195	83,950	79,284	16,385	0.75%	10.6%	10.9%
55 to 64	59,012	59,121	59,300	59,337	64,105	74,143	82,354	83,567	24,555	1.13%	10.0%	11.5%
65 to 74	41,423	43,221	48,939	52,662	53,225	53,349	57,305	65,765	24,343	1.50%	7.0%	9.0%
75 and above	28,332	29,144	36,171	44,858	53,128	59,687	62,659	64,499	36,168	2.69%	4.8%	8.9%

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

Table 50 – Projections of Total Number of Persons by Race and Ethnicity: Fresno SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Fresno SOI	592,347	596,063	621,543	647,980	672,647	694,243	712,956	728,195	135,848	0.67%	100.0%	100.0%
White	164,540	163,754	161,290	158,164	153,986	149,104	145,897	142,646	-21,894	-0.46%	27.8%	19.6%
Latino	301,195	304,959	327,843	352,674	377,956	402,258	423,610	442,556	141,361	1.25%	50.8%	60.8%
Black	40,416	40,509	41,379	42,167	42,639	42,655	42,130	41,240	823	0.07%	6.8%	5.7%
Asian	68,131	68,705	72,304	75,586	78,101	79,895	80,947	81,599	13,468	0.58%	11.5%	11.2%
Pacific Islander	823	831	873	911	943	976	1,004	1,023	200	0.71%	0.1%	0.1%
Native American	3,515	3,500	3,454	3,400	3,315	3,188	3,017	2,815	-700	-0.71%	0.6%	0.4%
Other	1,171	1,174	1,203	1,235	1,263	1,280	1,276	1,258	87	0.23%	0.2%	0.2%
Two or more	12,556	12,631	13,197	13,843	14,445	14,886	15,075	15,059	2,503	0.59%	2.1%	2.1%

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

Table 51 – Fresno Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	14,900	16,240	14,540	13,870	13,110	12,470	11,880	11,080
\$10,000 to \$24,999	34,390	37,480	34,100	32,690	31,020	29,510	28,110	26,230
\$25,000 to \$34,999	16,150	17,610	16,020	15,350	14,060	13,240	12,350	11,550
\$35,000 to \$49,999	26,220	28,460	27,440	28,650	26,340	24,800	23,130	21,630
\$50,000 to \$74,999	32,680	30,550	36,900	41,130	47,790	52,260	54,020	52,420
\$75,000 to \$99,999	23,920	22,370	27,130	29,570	31,460	33,260	35,460	40,540
\$100,000 to \$149,999	23,340	21,470	26,040	28,420	30,230	31,960	34,070	37,010
\$150,000 or more	17,120	15,750	19,100	20,850	22,380	24,330	27,290	29,910
Total	188,710	189,930	201,270	210,540	216,370	221,830	226,300	230,380
Mean Income	\$69,670	\$66,020	\$72,100	\$74,490	\$77,000	\$79,480	\$82,770	\$86,400
CAGR		-5.2%	1.8%	0.7%	0.7%	0.6%	0.8%	0.9%

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

HURON

Table 52 – Job Projections for Huron SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	840	790	870	890	900	900	910	900
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	10	10	30	30	30	30	30	40
Retail	40	40	45	50	50	50	50	60
Office	0	0	5	0	0	0	10	10
Education	120	120	185	190	200	210	220	220
Health Services	50	50	135	140	150	150	160	170
Hospitality	20	10	20	20	20	20	20	20
Government	160	160	180	190	190	200	210	210
Total	1,240	1,180	1,470	1,510	1,540	1,570	1,600	1,630

Source: ADE, Inc.

Table 53 – Population Projections: 2019-2050: Huron SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	5,700	5,700	5,930	6,200	6,460	6,680	6,880	7,030	1,330	0.7%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	5,700	5,700	5,930	6,200	6,460	6,680	6,880	7,030	1,330	0.7%
Tot. Nos. of HHs	1,490	1,490	1,570	1,650	1,700	1,750	1,790	1,820	330	0.6%
Persons Per Household	3.83	3.83	3.78	3.76	3.80	3.82	3.84	3.86		

Source: ADE

Table 54 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	80	160	210	260	300	330
Total Number of New Units Required By Period	150	227	279	327	368	397

Source: ADE

Table 55 –Projections of Total Number of Persons by Age: Huron SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Huron SOI	5,698	5,698	5,930	6,203	6,459	6,682	6,876	7,033	1,336	0.68%	100.0%	100.0%
5 and below	610	607	624	657	679	681	685	696	86	0.43%	10.7%	9.9%
6 to 14	962	934	853	883	924	965	980	981	18	0.06%	16.9%	13.9%
15 to 19	488	482	535	451	464	482	510	523	35	0.22%	8.6%	7.4%
20 to 24	453	461	466	520	439	451	469	494	41	0.28%	8.0%	7.0%
25 to 34	939	937	913	884	944	916	852	879	-60	-0.21%	16.5%	12.5%
35 to 44	770	772	831	875	859	832	889	861	90	0.36%	13.5%	12.2%
45 to 54	589	594	648	715	775	815	801	774	185	0.89%	10.3%	11.0%
55 to 64	470	484	473	538	591	651	706	741	271	1.48%	8.3%	10.5%
65 to 74	260	259	378	413	408	464	511	560	300	2.51%	4.6%	8.0%
75 and above	156	168	208	267	376	424	474	523	368	3.99%	2.7%	7.4%

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

Table 56 – Projections of Total Number of Persons by Race and Ethnicity: Huron SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Huron SOI	5,698	5,698	5,930	6,203	6,459	6,682	6,876	7,033	1,336	0.68%	100.0%	100.0%
White	78	76	72	67	63	58	53	48	-30	-1.55%	1.4%	0.7%
Latino	5,563	5,565	5,806	6,087	6,350	6,582	6,784	6,951	1,388	0.72%	97.6%	98.8%
Black	22	22	21	20	19	18	17	15	-7	-1.29%	0.4%	0.2%
Asian	28	27	25	23	22	20	18	16	-11	-1.69%	0.5%	0.2%
Pacific Islander	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Native American	7	7	6	6	5	4	4	3	-4	-2.43%	0.1%	0.0%
Other	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%

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

Table 57 – Huron Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	230	240	230	230	230	230	230	230
\$10,000 to \$24,999	650	670	650	660	660	660	660	660
\$25,000 to \$34,999	160	170	140	140	140	140	140	140
\$35,000 to \$49,999	160	180	180	190	190	190	190	190
\$50,000 to \$74,999	150	120	200	230	270	290	290	290
\$75,000 to \$99,999	70	60	90	100	110	120	140	160
\$100,000 to \$149,999	40	30	50	60	60	70	80	90
\$150,000 or more	30	30	30	40	40	50	50	60
Total	1,490	1,490	1,570	1,650	1,700	1,750	1,790	1,820
Mean Income	\$33,110	\$31,180	\$35,880	\$37,430	\$38,670	\$40,010	\$41,430	\$43,060
CAGR		-5.8%	2.8%	0.8%	0.7%	0.7%	0.7%	0.8%

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

KERMAN

Table 58 – Job Projections for Kerman SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	90	90	95	100	100	100	100	100
Mfg./Mining	160	160	160	160	160	160	160	160
Other Industrial	390	380	472	480	500	510	530	540
Retail	500	470	938	970	990	1,020	1,040	1,060
Office	390	370	680	700	720	740	760	770
Education	340	340	350	350	360	370	380	390
Health Services	410	400	417	430	440	450	450	460
Food Services	340	220	400	410	410	420	420	430
Government	170	170	178	180	190	190	190	190
Total	2,800	2,590	3,690	3,780	3,870	3,960	4,030	4,090

Source: ADE, Inc.

Table 59 – Population Projections: 2019-2050: Kerman SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	14,220	14,290	15,660	16,340	16,980	17,540	18,020	18,420	4,200	0.8%
Tot. Nos. of Persons in Group Qtrs.	20	30	30	30	30	30	30	40	20	2.3%
Tot. Nos. of Persons in HHs	14,200	14,260	15,630	16,310	16,950	17,510	17,990	18,380	4,180	0.8%
Tot. Nos. of HHs	4,010	4,030	4,490	4,710	4,840	4,970	5,070	5,160	1,150	0.8%
Persons Per Household	3.54	3.54	3.48	3.46	3.50	3.52	3.55	3.56		

Source: ADE

Table 60 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	480	700	830	960	1,060	1,150
Total Number of New Units Required By Period	686	894	1,034	1,162	1,269	1,349

Source: ADE

Table 61 – Projections of Total Number of Persons by Age: Kerman SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kerman SOI	14,222	14,292	15,661	16,344	16,982	17,541	18,025	18,419	4,197	0.84%	100.0%	100.0%
5 and below	1,463	1,468	1,582	1,632	1,675	1,690	1,749	1,781	318	0.64%	10.3%	9.7%
6 to 14	2,244	2,207	2,204	2,279	2,347	2,414	2,447	2,492	248	0.34%	15.8%	13.5%
15 to 19	1,200	1,201	1,315	1,177	1,222	1,257	1,291	1,314	114	0.29%	8.4%	7.1%
20 to 24	1,095	1,083	1,233	1,291	1,156	1,199	1,229	1,259	164	0.45%	7.7%	6.8%
25 to 34	1,991	2,021	2,248	2,300	2,453	2,375	2,279	2,340	349	0.52%	14.0%	12.7%
35 to 44	1,962	1,957	1,929	2,029	2,158	2,207	2,345	2,257	295	0.45%	13.8%	12.3%
45 to 54	1,544	1,545	1,859	1,945	1,834	1,929	2,044	2,078	533	0.96%	10.9%	11.3%
55 to 64	1,272	1,293	1,403	1,503	1,729	1,808	1,697	1,777	505	1.08%	8.9%	9.6%
65 to 74	876	930	1,097	1,190	1,235	1,324	1,518	1,574	698	1.91%	6.2%	8.5%
75 and above	575	586	791	998	1,174	1,337	1,425	1,548	973	3.25%	4.0%	8.4%

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

Table 62 – Projections of Total Number of Persons by Race and Ethnicity: Kerman SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kerman SOI	14,222	14,292	15,661	16,344	16,982	17,541	18,025	18,419	4,197	0.84%	100.0%	100.0%
White	2,314	2,294	2,338	2,269	2,198	2,115	2,059	1,995	-319	-0.48%	16.3%	10.8%
Latino	10,583	10,674	11,926	12,681	13,403	14,064	14,630	15,122	4,539	1.16%	74.4%	82.1%
Black	36	35	35	33	31	29	26	23	-13	-1.39%	0.3%	0.1%
Asian	1,048	1,048	1,109	1,110	1,103	1,089	1,071	1,048	0	0.00%	7.4%	5.7%
Pacific Islander	4	4	4	4	4	4	3	3	-1	-0.98%	0.0%	0.0%
Native American	49	48	46	42	38	34	30	26	-22	-1.97%	0.3%	0.1%
Other	32	32	32	30	28	27	25	22	-10	-1.16%	0.2%	0.1%
Two or more	157	157	170	174	177	179	180	179	23	0.44%	1.1%	1.0%

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

Table 63 – Kerman Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	140	160	140	130	130	120	110	110
\$10,000 to \$24,999	700	770	690	660	630	590	560	520
\$25,000 to \$34,999	590	640	580	550	510	470	440	410
\$35,000 to \$49,999	730	760	900	900	830	780	720	680
\$50,000 to \$74,999	730	670	860	980	1,150	1,260	1,330	1,290
\$75,000 to \$99,999	380	350	450	500	540	600	660	800
\$100,000 to \$149,999	570	510	660	730	790	860	940	1,020
\$150,000 or more	180	160	210	240	260	280	310	340
Total	4,010	4,030	4,490	4,710	4,840	4,970	5,070	5,160
Mean Income	\$61,120	\$57,930	\$63,280	\$65,520	\$68,010	\$70,400	\$73,000	\$76,060
CAGR		-5.2%	1.8%	0.7%	0.7%	0.7%	0.7%	0.8%

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

KINGSBURG

Table 64 – Job Projections for Kingsburg SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	120	120	130	130	130	130	140	130
Mfg./Mining	660	610	660	670	670	660	660	650
Other Industrial	1,170	1,160	1,740	1,770	1,790	1,810	1,820	1,830
Retail	410	390	460	470	480	490	510	510
Office	250	240	245	250	260	270	270	280
Education	270	270	272	280	290	290	300	310
Health Services	320	320	341	350	360	370	380	390
Hospitality	480	310	478	480	490	500	510	520
Government	70	70	74	80	80	80	90	90
Total	3,750	3,490	4,400	4,490	4,560	4,620	4,680	4,720

Source: ADE, Inc.

Table 65 – Population Projections: 2019-2050: Kingsburg SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	13,350	13,410	14,360	14,960	15,510	15,990	16,410	16,750	3,400	0.7%
Tot. Nos. of Persons in Group Qtrs.	100	90	100	110	110	110	120	120	20	0.6%
Tot. Nos. of Persons in HHs	13,250	13,320	14,260	14,850	15,400	15,880	16,290	16,630	3,380	0.7%
Tot. Nos. of HHs	4,260	4,280	4,650	4,860	4,990	5,110	5,210	5,300	1,040	0.7%
Persons Per Household	3.11	3.11	3.07	3.06	3.09	3.11	3.13	3.14		

Source: ADE

Table 66 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	390	600	730	850	950	1,040
Total Number of New Units Required By Period	508	743	892	1,016	1,119	1,196

Source: ADE

Table 67 – Projections of Total Number of Persons by Age: Kingsburg SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kingsburg SOI	13,349	13,411	14,363	14,956	15,508	15,992	16,412	16,753	3,405	0.74%	100.0%	100.0%
5 and below	1,135	1,148	1,272	1,338	1,369	1,362	1,456	1,510	375	0.93%	8.5%	9.0%
6 to 14	1,734	1,710	1,718	1,848	1,969	2,045	2,047	2,099	365	0.62%	13.0%	12.5%
15 to 19	1,055	1,012	1,024	934	1,000	1,079	1,125	1,136	81	0.24%	7.9%	6.8%
20 to 24	1,005	1,032	1,042	1,026	936	1,003	1,075	1,116	111	0.34%	7.5%	6.7%
25 to 34	1,742	1,782	2,104	2,109	2,074	1,968	1,933	2,056	314	0.54%	13.0%	12.3%
35 to 44	1,563	1,568	1,590	1,832	2,104	2,110	2,063	1,937	374	0.69%	11.7%	11.6%
45 to 54	1,587	1,563	1,555	1,595	1,573	1,814	2,071	2,054	467	0.84%	11.9%	12.3%
55 to 64	1,581	1,605	1,705	1,548	1,502	1,541	1,510	1,725	144	0.28%	11.8%	10.3%
65 to 74	1,068	1,082	1,299	1,501	1,548	1,406	1,363	1,383	316	0.84%	8.0%	8.3%
75 and above	878	910	1,053	1,224	1,432	1,665	1,770	1,736	858	2.22%	6.6%	10.4%

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

Table 68 – Projections of Total Number of Persons by Race and Ethnicity: Kingsburg SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Kingsburg SOI	13,349	13,411	14,363	14,956	15,508	15,992	16,412	16,753	3,405	0.74%	100.0%	100.0%
White	6,335	6,312	6,479	6,459	6,405	6,309	6,238	6,137	-198	-0.10%	47.5%	36.6%
Latino	6,221	6,303	7,034	7,619	8,204	8,776	9,276	9,736	3,515	1.46%	46.6%	58.1%
Black	36	36	35	33	31	28	25	22	-14	-1.52%	0.3%	0.1%
Asian	402	404	434	450	462	462	457	451	49	0.37%	3.0%	2.7%
Pacific Islander	6	6	6	6	6	6	5	5	-1	-0.76%	0.0%	0.0%
Native American	61	60	59	56	53	49	44	39	-21	-1.39%	0.5%	0.2%
Other	23	23	24	23	22	21	19	17	-7	-1.05%	0.2%	0.1%
Two or more	264	267	293	310	327	342	347	346	81	0.87%	2.0%	2.1%

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

Table 69 – Kingsburg Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	240	270	240	230	220	200	180	150
\$10,000 to \$24,999	630	720	630	610	580	520	480	410
\$25,000 to \$34,999	310	350	310	290	280	250	230	200
\$35,000 to \$49,999	370	410	370	330	320	280	260	220
\$50,000 to \$74,999	740	690	850	930	880	940	930	870
\$75,000 to \$99,999	910	850	1,050	1,160	1,260	1,360	1,470	1,630
\$100,000 to \$149,999	500	460	570	620	680	730	790	850
\$150,000 or more	560	520	640	700	760	820	890	960
Total	4,260	4,280	4,650	4,860	4,990	5,110	5,210	5,300
Mean Income	\$85,050	\$80,380	\$87,910	\$90,910	\$94,140	\$97,740	\$101,330	\$105,850
CAGR		-5.5%	1.8%	0.7%	0.7%	0.8%	0.7%	0.9%

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

MENDOTA

Table 70 – Job Projections for Mendota SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	120	110	100	100	100	100	100	100
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	100	90	100	100	100	110	110	120
Retail	180	170	190	200	200	210	210	220
Office	30	30	40	40	40	50	50	50
Education	160	160	160	170	170	180	180	190
Health Services	190	180	220	230	240	240	250	250
Hospitality	90	60	90	90	90	90	90	100
Government	40	40	40	40	40	40	40	50
Total	910	840	940	970	1,000	1,020	1,050	1,070

Source: ADE, Inc.

Table 71 – Population Projections: 2019-2050: Mendota SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	11,170	11,220	11,830	12,330	12,790	13,200	13,560	13,850	2,680	0.7%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	11,170	11,220	11,830	12,330	12,790	13,200	13,560	13,850	2,680	0.7%
Tot. Nos. of HHs	2,680	2,690	2,880	3,010	3,090	3,170	3,240	3,290	610	0.7%
Persons Per Household	4.17	4.17	4.11	4.10	4.14	4.16	4.19	4.21		

Source: ADE

Table 72 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	200	330	410	490	560	610
Total Number of New Units Required By Period	295	425	511	591	657	706

Source: ADE

Table 73 – Projections of Total Number of Persons by Age: Mendota SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Mendota SOI	11,174	11,222	11,826	12,327	12,795	13,204	13,559	13,848	2,675	0.69%	100.0%	100.0%
5 and below	1,157	1,153	1,179	1,231	1,289	1,308	1,326	1,333	176	0.46%	10.4%	9.6%
6 to 14	1,818	1,807	1,667	1,690	1,736	1,820	1,876	1,902	84	0.15%	16.3%	13.7%
15 to 19	847	864	1,053	889	901	914	956	999	152	0.53%	7.6%	7.2%
20 to 24	836	792	849	1,026	865	877	890	930	94	0.35%	7.5%	6.7%
25 to 34	1,860	1,825	1,640	1,584	1,802	1,812	1,672	1,695	-165	-0.30%	16.6%	12.2%
35 to 44	1,715	1,757	1,853	1,740	1,549	1,495	1,701	1,710	-5	-0.01%	15.3%	12.3%
45 to 54	1,194	1,206	1,435	1,660	1,733	1,626	1,447	1,397	203	0.51%	10.7%	10.1%
55 to 64	928	962	1,015	1,114	1,313	1,516	1,581	1,483	555	1.52%	8.3%	10.7%
65 to 74	526	551	727	840	877	962	1,134	1,308	781	2.98%	4.7%	9.4%
75 and above	292	304	408	553	730	875	975	1,090	799	4.35%	2.6%	7.9%

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

Table 74 – Projections of Total Number of Persons by Race and Ethnicity: Mendota SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Mendota SOI	11,174	11,222	11,826	12,327	12,795	13,204	13,559	13,848	2,675	0.69%	100.0%	100.0%
White	213	211	206	202	201	195	193	189	-24	-0.39%	1.9%	1.4%
Latino	10,854	10,906	11,519	12,032	12,508	12,931	13,295	13,597	2,743	0.73%	97.1%	98.2%
Black	23	23	22	20	19	17	16	14	-9	-1.60%	0.2%	0.1%
Asian	36	35	33	31	28	25	22	19	-17	-2.06%	0.3%	0.1%
Pacific Islander	1	1	1	1	1	1	1	1	0	-1.29%	0.0%	0.0%
Native American	21	21	20	18	16	14	13	11	-11	-2.19%	0.2%	0.1%
Other	17	17	17	16	16	15	14	13	-4	-0.82%	0.2%	0.1%
Two or more	9	8	8	8	7	6	6	5	-3	-1.57%	0.1%	0.0%

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

Table 75 – Mendota Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	190	200	190	190	190	180	180	180
\$10,000 to \$24,999	890	940	920	950	950	930	910	900
\$25,000 to \$34,999	500	520	490	510	510	500	490	490
\$35,000 to \$49,999	440	470	510	490	490	480	480	480
\$50,000 to \$74,999	420	360	500	580	610	660	690	680
\$75,000 to \$99,999	110	90	130	150	180	200	240	270
\$100,000 to \$149,999	110	90	120	140	170	190	220	270
\$150,000 or more	10	10	10	10	10	20	20	20
Total	2,680	2,690	2,880	3,010	3,090	3,170	3,240	3,290
Mean Income	\$37,970	\$35,880	\$39,290	\$40,770	\$42,080	\$43,710	\$45,530	\$47,220
CAGR		-5.5%	1.8%	0.7%	0.6%	0.8%	0.8%	0.7%

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

ORANGE COVE

Table 76 – Job Projections for Orange Cove SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	40	30	40	40	40	40	40	40
Mfg./Mining	50	50	50	50	50	50	50	50
Other Industrial	50	50	50	50	50	50	60	60
Retail	60	50	60	60	70	70	70	70
Office	20	20	20	20	20	20	20	30
Education	150	150	150	150	160	160	160	170
Health Services	210	200	210	210	220	230	230	240
Hospitality	0	0	0	0	0	0	0	0
Government	50	50	50	50	50	50	50	50
Total	640	600	630	650	670	680	700	710

Source: ADE, Inc.

Table 77 – Population Projections: 2019-2050: Orange Cove SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	9,170	9,170	9,660	10,070	10,450	10,780	11,070	11,310	2,140	0.7%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	9,170	9,170	9,660	10,070	10,450	10,780	11,070	11,310	2,140	0.7%
Tot. Nos. of HHs	2,150	2,150	2,300	2,410	2,480	2,540	2,590	2,640	490	0.7%
Persons Per Household	4.27	4.27	4.20	4.18	4.21	4.24	4.27	4.28		

Source: ADE

Table 78 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	150	260	330	390	440	490
Total Number of New Units Required By Period	136	216	272	336	389	428

Source: ADE

Table 79 – Projections of Total Number of Persons by Age: Orange Cove SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Orange Cove SOI	9,168	9,168	9,656	10,066	10,449	10,784	11,074	11,311	2,143	0.68%	100.0%	100.0%
5 and below	1,042	1,046	1,107	1,145	1,145	1,132	1,135	1,152	110	0.33%	11.4%	10.2%
6 to 14	1,642	1,588	1,442	1,532	1,603	1,634	1,621	1,609	-32	-0.06%	17.9%	14.2%
15 to 19	845	849	935	738	794	837	866	861	16	0.06%	9.2%	7.6%
20 to 24	765	773	822	900	712	767	808	834	68	0.28%	8.3%	7.4%
25 to 34	1,425	1,440	1,518	1,511	1,631	1,525	1,403	1,489	64	0.14%	15.5%	13.2%
35 to 44	1,136	1,118	1,193	1,338	1,405	1,403	1,515	1,412	276	0.70%	12.4%	12.5%
45 to 54	897	905	969	1,030	1,094	1,231	1,293	1,288	391	1.18%	9.8%	11.4%
55 to 64	680	694	767	815	869	926	984	1,106	425	1.58%	7.4%	9.8%
65 to 74	457	462	532	592	651	695	741	787	331	1.77%	5.0%	7.0%
75 and above	280	293	370	464	547	635	707	772	492	3.32%	3.1%	6.8%

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

Table 80 – Projections of Total Number of Persons by Race and Ethnicity: Orange Cove SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Orange Cove SOI	9,168	9,168	9,656	10,066	10,449	10,784	11,074	11,311	2,143	0.68%	100.0%	100.0%
White	388	381	364	345	329	315	302	292	-97	-0.92%	4.2%	2.6%
Latino	8,599	8,610	9,124	9,565	9,976	10,337	10,652	10,910	2,311	0.77%	93.8%	96.5%
Black	18	17	17	15	14	13	12	11	-7	-1.49%	0.2%	0.1%
Asian	78	76	71	65	59	53	47	42	-36	-1.96%	0.8%	0.4%
Pacific Islander	2	2	2	1	1	1	1	1	0	-0.94%	0.0%	0.0%
Native American	23	23	21	19	17	15	13	11	-12	-2.28%	0.3%	0.1%
Other	15	15	14	14	13	12	11	10	-5	-1.24%	0.2%	0.1%
Two or more	46	45	43	41	40	38	35	33	-13	-1.04%	0.5%	0.3%

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

Table 81 – Orange Cove Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	220	230	210	210	200	200	200	200
\$10,000 to \$24,999	870	900	870	870	860	860	850	850
\$25,000 to \$34,999	370	390	370	370	370	370	360	360
\$35,000 to \$49,999	310	310	370	410	410	410	410	410
\$50,000 to \$74,999	190	170	250	300	360	390	400	400
\$75,000 to \$99,999	80	70	100	110	120	140	170	180
\$100,000 to \$149,999	70	60	80	80	90	100	120	150
\$150,000 or more	40	30	50	50	60	60	70	90
Total	2,150	2,150	2,300	2,410	2,480	2,540	2,590	2,640
Mean Income	\$34,460	\$32,470	\$36,370	\$37,850	\$39,170	\$40,690	\$42,280	\$44,170
CAGR		-5.8%	2.3%	0.8%	0.7%	0.8%	0.8%	0.9%

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

PARLIER

Table 82 – Job Projections for Parlier SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	260	240	251	260	260	260	260	260
Mfg./Mining	370	350	361	360	360	360	360	350
Other Industrial	310	280	301	320	330	350	370	380
Retail	160	150	151	160	170	180	180	190
Office	50	50	41	50	50	50	60	60
Education	450	460	451	470	490	510	530	540
Health Services	420	410	442	460	480	500	520	530
Hospitality	150	100	101	100	110	110	120	120
Government	120	120	111	120	120	130	130	130
Total	2,300	2,150	2,210	2,300	2,380	2,450	2,510	2,570

Source: ADE, Inc.

Table 83 – Population Projections: 2019-2050: Parlier SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	14,040	14,140	14,740	15,380	15,980	16,500	16,950	17,320	3,280	0.7%
Tot. Nos. of Persons in Group Qtrs.	10	0	0	0	10	0	0	10	0	
Tot. Nos. of Persons in HHs	14,030	14,140	14,740	15,380	15,970	16,500	16,950	17,310	3,280	0.7%
Tot. Nos. of HHs	3,390	3,410	3,620	3,790	3,900	4,000	4,080	4,150	760	0.7%
Persons Per Household	4.14	4.15	4.07	4.06	4.09	4.13	4.15	4.17		

Source: ADE

Table 84 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	230	400	510	610	690	760
Total Number of New Units Required By Period	256	407	519	621	706	769

Source: ADE

Table 85 –Projections of Total Number of Persons by Age: Parlier SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Parlier SOI	14,036	14,139	14,743	15,381	15,976	16,497	16,949	17,317	3,281	0.68%	100.0%	100.0%
5 and below	1,588	1,594	1,630	1,677	1,707	1,713	1,728	1,753	165	0.32%	11.3%	10.1%
6 to 14	2,400	2,377	2,220	2,299	2,367	2,426	2,448	2,455	55	0.07%	17.1%	14.2%
15 to 19	1,167	1,189	1,344	1,159	1,208	1,243	1,280	1,298	131	0.34%	8.3%	7.5%
20 to 24	1,134	1,113	1,144	1,300	1,122	1,170	1,203	1,236	102	0.28%	8.1%	7.1%
25 to 34	2,203	2,228	2,200	2,142	2,328	2,303	2,182	2,253	50	0.07%	15.7%	13.0%
35 to 44	1,875	1,871	1,915	2,067	2,053	2,000	2,173	2,145	269	0.43%	13.4%	12.4%
45 to 54	1,455	1,469	1,622	1,720	1,770	1,913	1,899	1,846	392	0.77%	10.4%	10.7%
55 to 64	1,150	1,181	1,275	1,321	1,468	1,555	1,602	1,727	577	1.32%	8.2%	10.0%
65 to 74	644	670	831	1,005	1,089	1,132	1,258	1,326	682	2.36%	4.6%	7.7%
75 and above	420	447	562	691	864	1,043	1,176	1,278	858	3.66%	3.0%	7.4%

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

Table 86 – Projections of Total Number of Persons by Race and Ethnicity: Parlier SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Parlier SOI	14,036	14,139	14,743	15,381	15,976	16,497	16,949	17,317	3,281	0.68%	100.0%	100.0%
White	206	205	199	193	187	181	174	168	-39	-0.67%	1.5%	1.0%
Latino	13,743	13,849	14,466	15,116	15,724	16,258	16,722	17,102	3,359	0.71%	97.9%	98.8%
Black	11	10	9	9	8	7	6	6	-5	-2.06%	0.1%	0.0%
Asian	33	32	29	25	22	19	16	14	-19	-2.81%	0.2%	0.1%
Pacific Islander	3	3	3	3	2	2	2	2	-1	-1.68%	0.0%	0.0%
Native American	12	11	11	10	9	8	7	6	-5	-1.98%	0.1%	0.0%
Other	13	13	12	12	11	10	10	9	-4	-1.29%	0.1%	0.1%
Two or more	16	15	15	14	13	12	12	11	-5	-1.17%	0.1%	0.1%

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

Table 87 – Parlier Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	530	570	540	540	530	520	500	490
\$10,000 to \$24,999	1,000	1,080	1,030	1,050	1,050	1,030	1,020	1,010
\$25,000 to \$34,999	510	550	460	470	470	460	450	450
\$35,000 to \$49,999	230	170	190	190	190	180	180	180
\$50,000 to \$74,999	680	630	840	930	970	1,020	1,050	1,020
\$75,000 to \$99,999	210	200	270	300	330	370	420	500
\$100,000 to \$149,999	170	160	210	240	260	290	320	360
\$150,000 or more	70	60	80	90	100	110	130	140
Total	3,390	3,410	3,620	3,790	3,900	4,000	4,080	4,150
Mean Income	\$41,160	\$38,890	\$43,890	\$45,530	\$47,070	\$48,970	\$50,850	\$52,930
CAGR		-5.5%	2.4%	0.7%	0.7%	0.8%	0.8%	0.8%

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

REEDLEY

Table 88 – Job Projections for Reedley SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	110	100	110	110	110	110	110	110
Mfg./Mining	260	230	336	340	340	330	330	330
Other Industrial	1,150	1,030	1,333	1,360	1,370	1,370	1,380	1,380
Retail	640	590	1,050	1,060	1,070	1,070	1,080	1,080
Office	290	260	325	330	330	330	340	340
Education	1,270	1,260	1,310	1,330	1,350	1,350	1,350	1,360
Health Services	1,450	1,410	1,596	1,620	1,630	1,640	1,650	1,660
Hospitality	430	290	450	450	450	460	460	460
Government	220	220	220	220	230	230	230	230
Total	5,820	5,390	6,730	6,810	6,880	6,890	6,940	6,960

Source: ADE, Inc.

Table 89 – Population Projections: 2019-2050: Reedley SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	25,170	25,170	26,100	27,240	28,300	29,230	30,040	30,700	5,530	0.6%
Tot. Nos. of Persons in Group Qtrs.	320	310	340	350	360	370	390	400	80	0.7%
Tot. Nos. of Persons in HHs	24,850	24,860	25,760	26,890	27,940	28,860	29,650	30,300	5,450	0.6%
Tot. Nos. of HHs	6,930	6,930	7,300	7,650	7,870	8,070	8,240	8,390	1,460	0.6%
Persons Per Household	3.59	3.59	3.53	3.52	3.55	3.58	3.60	3.61		

Source: ADE

Table 90 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	370	720	940	1,140	1,310	1,460
Total Number of New Units Required By Period	521	859	1,088	1,296	1,470	1,599

Source: ADE

Table 91 – Projections of Total Number of Persons by Age: Reedley SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Reedley SOI	25,169	25,169	26,098	27,238	28,301	29,232	30,039	30,695	5,526	0.64%	100.0%	100.0%
5 and below	2,515	2,522	2,634	2,720	2,733	2,756	2,878	2,977	462	0.55%	10.0%	9.7%
6 to 14	3,665	3,591	3,545	3,773	3,941	4,008	4,009	4,095	430	0.36%	14.6%	13.3%
15 to 19	2,012	2,029	2,002	1,874	2,013	2,118	2,174	2,158	146	0.23%	8.0%	7.0%
20 to 24	1,996	1,983	1,980	1,970	1,847	1,982	2,078	2,124	128	0.20%	7.9%	6.9%
25 to 34	3,764	3,763	3,953	3,851	3,860	3,728	3,725	3,926	162	0.14%	15.0%	12.8%
35 to 44	3,139	3,116	3,207	3,601	3,821	3,724	3,714	3,558	420	0.41%	12.5%	11.6%
45 to 54	2,897	2,903	2,866	2,953	3,069	3,447	3,639	3,520	623	0.63%	11.5%	11.5%
55 to 64	2,440	2,443	2,604	2,689	2,682	2,764	2,856	3,184	744	0.86%	9.7%	10.4%
65 to 74	1,513	1,583	1,890	2,136	2,303	2,378	2,362	2,414	901	1.52%	6.0%	7.9%
75 and above	1,229	1,235	1,418	1,671	2,031	2,327	2,604	2,740	1,511	2.62%	4.9%	8.9%

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

Table 92 – Projections of Total Number of Persons by Race and Ethnicity: Reedley SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Reedley SOI	25,169	25,169	26,098	27,238	28,301	29,232	30,039	30,695	5,526	0.64%	100.0%	100.0%
White	4,084	4,013	3,815	3,658	3,500	3,330	3,199	3,074	-1,011	-0.91%	16.2%	10.0%
Latino	20,029	20,114	21,264	22,576	23,832	24,975	25,953	26,781	6,752	0.94%	79.6%	87.2%
Black	95	96	102	109	107	103	108	111	15	0.48%	0.4%	0.4%
Asian	666	655	629	609	579	544	505	466	-200	-1.15%	2.6%	1.5%
Pacific Islander	4	4	4	4	4	3	3	3	-1	-1.28%	0.0%	0.0%
Native American	50	49	46	43	39	36	32	28	-23	-1.90%	0.2%	0.1%
Other	42	41	40	38	37	36	34	31	-11	-0.97%	0.2%	0.1%
Two or more	197	196	198	201	204	205	205	202	5	0.09%	0.8%	0.7%

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

Table 93 – Reedley Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	350	390	350	330	310	290	270	250
\$10,000 to \$24,999	1,330	1,470	1,300	1,240	1,160	1,090	1,010	950
\$25,000 to \$34,999	900	990	880	830	760	770	850	940
\$35,000 to \$49,999	1,120	1,150	1,160	1,210	1,130	1,050	970	900
\$50,000 to \$74,999	1,400	1,290	1,590	1,810	2,140	2,240	2,150	1,950
\$75,000 to \$99,999	640	590	720	790	840	930	1,050	1,280
\$100,000 to \$149,999	740	660	820	900	950	1,060	1,190	1,300
\$150,000 or more	450	400	490	540	580	650	750	820
Total	6,930	6,930	7,300	7,650	7,870	8,070	8,240	8,390
Mean Income	\$59,170	\$55,890	\$61,150	\$63,240	\$65,470	\$68,140	\$70,960	\$73,530
CAGR		-5.5%	1.8%	0.7%	0.7%	0.8%	0.8%	0.7%

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

SANGER

Table 94 – Job Projections for Sanger SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	500	470	495	490	500	500	500	500
Mfg./Mining	710	660	705	710	710	700	690	690
Other Industrial	840	750	835	890	940	1,000	1,050	1,110
Retail	710	660	735	790	840	890	930	980
Office	150	140	155	190	210	240	270	300
Education	920	920	920	980	1,040	1,100	1,150	1,190
Health Services	740	720	750	810	860	910	950	990
Hospitality	570	380	587	620	650	670	710	740
Government	440	450	438	460	480	490	510	520
Total	5,570	5,150	5,620	5,930	6,220	6,500	6,760	7,010

Source: ADE, Inc.

Table 95 – Population Projections: 2019-2050: Sanger SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	28,660	28,770	30,090	31,370	32,560	33,600	34,510	35,240	6,580	0.7%
Tot. Nos. of Persons in Group Qtrs.	150	150	160	170	170	180	190	190	40	0.8%
Tot. Nos. of Persons in HHs	28,510	28,620	29,930	31,200	32,390	33,420	34,320	35,050	6,540	0.7%
Tot. Nos. of HHs	7,810	7,840	8,340	8,720	8,960	9,190	9,370	9,540	1,730	0.6%
Persons Per Household	3.65	3.65	3.59	3.58	3.61	3.64	3.66	3.67		

Source: ADE

Table 96 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	530	910	1,150	1,380	1,560	1,730
Total Number of New Units Required By Period	615	976	1,227	1,456	1,648	1,790

Source: ADE

Table 97 –Projections of Total Number of Persons by Age: Sanger SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Sanger SOI	28,665	28,770	30,094	31,370	32,561	33,603	34,507	35,243	6,578	0.67%	100.0%	100.0%
5 and below	2,976	2,993	3,138	3,218	3,235	3,266	3,380	3,474	498	0.50%	10.4%	9.9%
6 to 14	4,243	4,228	4,230	4,477	4,648	4,711	4,720	4,804	562	0.40%	14.8%	13.6%
15 to 19	2,284	2,275	2,349	2,230	2,380	2,491	2,541	2,527	242	0.33%	8.0%	7.2%
20 to 24	2,425	2,379	2,231	2,303	2,189	2,333	2,434	2,473	48	0.06%	8.5%	7.0%
25 to 34	3,961	4,077	4,581	4,471	4,404	4,358	4,373	4,585	623	0.47%	13.8%	13.0%
35 to 44	3,699	3,594	3,466	3,905	4,393	4,287	4,203	4,129	430	0.36%	12.9%	11.7%
45 to 54	3,248	3,278	3,472	3,407	3,291	3,710	4,153	4,023	775	0.69%	11.3%	11.4%
55 to 64	2,669	2,708	2,867	3,040	3,224	3,162	3,039	3,408	739	0.79%	9.3%	9.7%
65 to 74	1,744	1,776	2,101	2,375	2,515	2,671	2,820	2,742	998	1.47%	6.1%	7.8%
75 and above	1,415	1,463	1,659	1,944	2,282	2,614	2,845	3,078	1,663	2.54%	4.9%	8.7%

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

Table 98 – Projections of Total Number of Persons by Race and Ethnicity: Sanger SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Sanger SOI	28,665	28,770	30,094	31,370	32,561	33,603	34,507	35,243	6,578	0.67%	100.0%	100.0%
White	3,674	3,629	3,507	3,394	3,290	3,183	3,107	3,010	-663	-0.64%	12.8%	8.5%
Latino	23,711	23,866	25,299	26,672	27,961	29,118	30,115	30,971	7,260	0.87%	82.7%	87.9%
Black	129	129	133	135	130	125	125	123	-6	-0.15%	0.5%	0.3%
Asian	766	764	779	794	803	808	804	798	33	0.13%	2.7%	2.3%
Pacific Islander	26	25	24	23	21	20	19	17	-8	-1.26%	0.1%	0.0%
Native American	102	100	94	88	82	75	67	58	-44	-1.79%	0.4%	0.2%
Other	25	25	24	23	22	21	20	18	-7	-1.10%	0.1%	0.1%
Two or more	232	231	233	241	251	254	251	247	14	0.19%	0.8%	0.7%

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

Table 99 – Sanger Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	360	390	350	330	320	310	300	270
\$10,000 to \$24,999	1,480	1,600	1,410	1,340	1,290	1,260	1,220	1,120
\$25,000 to \$34,999	930	1,010	890	840	810	720	600	540
\$35,000 to \$49,999	1,340	1,470	1,550	1,600	1,570	1,470	1,340	1,210
\$50,000 to \$74,999	1,060	970	1,200	1,360	1,460	1,600	1,710	1,700
\$75,000 to \$99,999	1,300	1,190	1,470	1,620	1,750	1,910	2,080	2,430
\$100,000 to \$149,999	980	880	1,080	1,190	1,290	1,400	1,530	1,630
\$150,000 or more	360	320	400	440	480	530	590	630
Total	7,810	7,840	8,340	8,720	8,960	9,190	9,370	9,540
Mean Income	\$60,700	\$57,440	\$62,670	\$64,950	\$66,850	\$69,310	\$71,990	\$74,950
CAGR		-5.4%	1.8%	0.7%	0.6%	0.7%	0.8%	0.8%

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

SAN JOAQUIN

Table 100 – Job Projections for San Joaquin SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	60	60	54	50	60	60	70	70
Mfg./Mining	0	0	0	0	0	0	0	0
Other Industrial	30	20	26	30	30	30	30	40
Retail	10	0	4	10	10	10	10	10
Office	10	0	3	10	10	10	10	10
Education	300	280	270	270	280	290	300	300
Health Services	10	10	7	10	10	10	10	10
Hospitality	10	0	0	0	0	0	0	0
Government	60	60	46	50	50	50	50	50
Total	480	440	410	430	450	460	480	490

Source: ADE, Inc.

Table 101 – Population Projections: 2019-2050: San Joaquin SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	3,500	3,500	3,610	3,750	3,880	3,990	4,090	4,170	670	0.6%
Tot. Nos. of Persons in Group Qtrs.	0	0	0	0	0	0	0	0	0	
Tot. Nos. of Persons in HHs	3,500	3,500	3,610	3,750	3,880	3,990	4,090	4,170	670	0.6%
Tot. Nos. of HHs	890	890	930	970	1,000	1,020	1,040	1,050	160	0.5%
Persons Per Household	3.93	3.93	3.88	3.87	3.88	3.91	3.93	3.97		

Source: ADE

Table 102 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	40	80	110	130	150	160
Total Number of New Units Required By Period	64	108	132	154	172	186

Source: ADE

Table 103 –Projections of Total Number of Persons by Age: San Joaquin SOI

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
San Joaquin SOI	3,499	3,499	3,615	3,752	3,879	3,991	4,088	4,166	668	0.57%	100.0%	100.0%
5 and below	383	387	415	438	434	416	411	422	39	0.31%	10.9%	10.1%
6 to 14	594	566	516	562	602	622	606	586	-8	-0.04%	17.0%	14.1%
15 to 19	350	355	323	258	285	309	330	325	-25	-0.24%	10.0%	7.8%
20 to 24	324	315	336	308	247	275	299	317	-6	-0.06%	9.3%	7.6%
25 to 34	510	524	588	605	602	523	495	542	32	0.20%	14.6%	13.0%
35 to 44	444	435	404	473	536	557	559	484	40	0.28%	12.7%	11.6%
45 to 54	361	372	401	388	365	431	492	511	151	1.13%	10.3%	12.3%
55 to 64	274	267	293	325	354	346	327	387	114	1.13%	7.8%	9.3%
65 to 74	179	187	214	220	245	274	301	293	114	1.61%	5.1%	7.0%
75 and above	81	90	124	174	209	238	268	298	216	4.28%	2.3%	7.1%

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

Table 104 – Projections of Total Number of Persons by Race and Ethnicity: San Joaquin SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
San Joaquin SOI	3,499	3,499	3,615	3,752	3,879	3,991	4,088	4,166	668	0.57%	100.0%	100.0%
White	89	89	81	73	66	60	53	47	-42	-2.02%	2.6%	1.1%
Latino	3,374	3,375	3,501	3,649	3,787	3,908	4,014	4,101	728	0.63%	96.4%	98.4%
Black	1	1	1	1	1	1	1	1	-1	-1.54%	0.0%	0.0%
Asian	27	27	24	22	20	17	15	13	-14	-2.29%	0.8%	0.3%
Pacific Islander	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Native American	7	7	6	6	5	5	4	4	-3	-2.14%	0.2%	0.1%
Other	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%
Two or more	0	0	0	0	0	0	0	0	0	NA	0.0%	0.0%

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

Table 105 – San Joaquin Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	210	210	230	230	230	230	220	210
\$10,000 to \$24,999	260	270	270	280	270	270	260	250
\$25,000 to \$34,999	100	100	50	40	40	40	40	40
\$35,000 to \$49,999	30	50	30	20	20	20	20	20
\$50,000 to \$74,999	120	110	150	160	170	180	180	180
\$75,000 to \$99,999	100	90	130	150	160	180	200	210
\$100,000 to \$149,999	50	50	70	80	80	90	100	110
\$150,000 or more	10	10	10	10	10	20	20	20
Total	890	890	930	970	1,000	1,020	1,040	1,050
Mean Income	\$38,570	\$36,390	\$42,010	\$43,680	\$45,080	\$47,120	\$49,400	\$51,440
CAGR		-5.7%	2.9%	0.8%	0.6%	0.9%	0.9%	0.8%

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

SELMA

Table 106 – Job Projections for Selma SOI by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	450	450	450	450	450	450	460	450
Mfg./Mining	410	410	410	410	410	410	400	400
Other Industrial	1,220	1,220	1,324	1,350	1,380	1,410	1,430	1,460
Retail	1,540	1,430	1,790	1,830	1,870	1,910	1,940	1,960
Office	540	510	736	750	760	770	780	790
Education	600	600	640	650	660	670	680	690
Health Services	630	630	810	820	840	850	860	870
Hospitality	970	640	1,030	1,040	1,060	1,070	1,080	1,090
Government	190	190	210	210	220	220	220	220
Total	6,540	6,090	7,400	7,530	7,660	7,770	7,860	7,930

Source: ADE, Inc.

Table 107 – Population Projections: 2019-2050: Selma SOI

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	26,960	27,000	29,130	30,360	31,510	32,520	33,390	34,100	7,140	0.8%
Tot. Nos. of Persons in Group Qtrs.	190	190	210	220	230	240	240	250	60	0.9%
Tot. Nos. of Persons in HHs	26,770	26,810	28,920	30,140	31,280	32,280	33,150	33,850	7,080	0.8%
Tot. Nos. of HHs	7,350	7,360	8,080	8,450	8,680	8,900	9,080	9,240	1,890	0.7%
Persons Per Household	3.64	3.64	3.58	3.57	3.60	3.63	3.65	3.66		

Source: ADE

Table 108 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	730	1,100	1,330	1,550	1,730	1,890
Total Number of New Units Required By Period	799	1,132	1,373	1,595	1,779	1,917

Source: ADE

Table 109 – Projections of Total Number of Persons by Age: Selma SOI

AGE GROUP	YEAR								2015-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Selma SOI	26,958	26,996	29,131	30,362	31,510	32,516	33,387	34,096	7,138	0.76%	100.0%	100.0%
5 and below	2,761	2,770	2,997	3,079	3,094	3,126	3,236	3,331	570	0.61%	10.2%	9.8%
6 to 14	3,816	3,780	4,041	4,296	4,463	4,522	4,526	4,608	792	0.61%	14.2%	13.5%
15 to 19	2,105	2,080	2,125	2,128	2,288	2,398	2,448	2,429	324	0.46%	7.8%	7.1%
20 to 24	2,141	2,134	2,109	2,088	2,094	2,248	2,347	2,386	245	0.35%	7.9%	7.0%
25 to 34	4,034	4,063	4,407	4,195	4,091	4,073	4,211	4,431	397	0.30%	15.0%	13.0%
35 to 44	3,374	3,374	3,566	4,033	4,245	4,041	3,920	3,873	499	0.45%	12.5%	11.4%
45 to 54	3,059	3,042	3,289	3,317	3,402	3,847	4,028	3,807	747	0.71%	11.3%	11.2%
55 to 64	2,533	2,532	2,802	2,923	3,068	3,091	3,156	3,543	1,010	1.09%	9.4%	10.4%
65 to 74	1,727	1,795	2,073	2,302	2,471	2,578	2,693	2,689	962	1.44%	6.4%	7.9%
75 and above	1,407	1,426	1,720	2,002	2,294	2,591	2,820	2,999	1,592	2.47%	5.2%	8.8%

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

Table 110 – Projections of Total Number of Persons by Race and Ethnicity: Selma SOI

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Selma SOI	26,958	26,996	29,131	30,362	31,510	32,516	33,387	34,096	7,138	0.76%	100.0%	100.0%
White	3,551	3,481	3,377	3,168	2,961	2,762	2,612	2,473	-1,078	-1.16%	13.2%	7.3%
Latino	21,855	21,973	24,151	25,581	26,945	28,177	29,236	30,129	8,274	1.04%	81.1%	88.4%
Black	154	153	157	157	156	153	151	148	-6	-0.13%	0.6%	0.4%
Asian	975	970	1,015	1,028	1,028	1,010	987	959	-17	-0.06%	3.6%	2.8%
Pacific Islander	2	2	2	2	1	1	1	0	-2	-5.16%	0.0%	0.0%
Native American	114	111	107	97	87	75	64	53	-61	-2.45%	0.4%	0.2%
Other	70	71	80	87	92	99	105	110	40	1.48%	0.3%	0.3%
Two or more	237	236	243	243	241	238	232	225	-12	-0.17%	0.9%	0.7%

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

Table 111 – Selma Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	340	370	330	320	310	290	270	250
\$10,000 to \$24,999	1,180	1,290	1,170	1,130	1,070	1,010	940	870
\$25,000 to \$34,999	1,300	1,420	1,290	1,250	1,190	1,110	1,040	960
\$35,000 to \$49,999	1,170	1,260	1,410	1,440	1,380	1,300	1,220	1,130
\$50,000 to \$74,999	1,520	1,380	1,760	1,970	2,210	2,450	2,640	2,580
\$75,000 to \$99,999	800	720	930	1,020	1,110	1,200	1,310	1,660
\$100,000 to \$149,999	710	640	820	900	980	1,050	1,140	1,210
\$150,000 or more	320	290	370	410	450	480	530	570
Total	7,350	7,360	8,080	8,450	8,680	8,900	9,080	9,240
Mean Income	\$58,900	\$55,690	\$60,810	\$62,820	\$65,000	\$67,260	\$69,680	\$72,460
CAGR		-5.4%	1.8%	0.7%	0.7%	0.7%	0.7%	0.8%

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

FRESNO COUNTY (UNINCORPORATED)

Table 112 – Job Projections for Unincorporated Fresno County by Sector, 2019-2050

JOB SECTOR	YEAR							
	2019	2020	2025	2030	2035	2040	2045	2050
Agriculture	39,370	36,660	39,635	40,370	40,820	41,180	41,270	41,170
Mfg./Mining	5,600	3,720	3,741	3,730	3,730	3,710	3,660	3,600
Other Industrial	7,260	7,400	5,579	5,820	6,140	6,450	7,130	7,820
Retail	2,380	2,340	1,478	1,500	1,520	1,530	1,540	1,560
Office	2,150	1,800	2,073	2,520	3,000	3,420	3,920	4,190
Education	7,680	7,820	8,317	8,430	8,530	8,620	8,690	8,750
Health Services	3,060	2,960	7,128	7,220	7,310	7,380	7,450	7,500
Hospitality	3,150	2,310	3,383	3,640	3,840	4,160	4,070	3,980
Government	4,540	4,690	5,336	5,410	5,470	5,530	5,580	5,620
Total	75,200	69,700	76,670	78,620	80,350	81,980	83,320	84,210

Source: ADE, Inc.

Table 113 – Population Projections: 2019-2050: Unincorporated County

POPULATION VARIABLE	YEAR								2015-2050	
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*
Tot. Nos. of Persons	112,110	112,160	115,160	116,660	118,060	119,290	120,350	121,220	9,110	0.3%
Tot. Nos. of Persons in Group Qtrs.	3,680	3,640	3,880	3,930	3,960	4,000	4,030	4,070	390	0.3%
Tot. Nos. of Persons in HHs	108,430	108,520	111,280	112,730	114,100	115,290	116,320	117,150	8,720	0.2%
Tot. Nos. of HHs	32,340	32,370	33,760	34,310	34,380	34,500	34,580	34,710	2,370	0.2%
Persons Per Household	3.35	3.35	3.30	3.29	3.32	3.34	3.36	3.38		

Source: ADE

Table 114 – 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					
	2019-25	2019-30	2019-35	2019-40	2019-45	2019-50
Total Number of New Households By Period	1,420	1,970	2,040	2,160	2,240	2,370
Total Number of New Units Required By Period	1,175	1,671	1,758	1,883	1,979	2,095

Source: ADE

Table 115 –Projections of Total Number of Persons by Age: Unincorporated County

AGE GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Uninc. Area excl. SOIs	112,111	112,162	115,162	116,663	118,063	119,289	120,352	121,217	9,106	0.25%	100.0%	100.0%
5 and below	8,355	8,572	9,725	10,193	10,161	10,041	10,452	10,982	2,627	0.89%	7.5%	9.1%
6 to 14	11,969	11,819	12,162	13,749	14,942	15,331	15,125	15,184	3,216	0.77%	10.7%	12.5%
15 to 19	7,287	7,174	6,908	6,341	7,267	8,143	8,499	8,364	1,078	0.45%	6.5%	6.9%
20 to 24	8,206	7,832	7,192	6,869	6,316	7,263	8,099	8,395	189	0.07%	7.3%	6.9%
25 to 34	14,926	15,563	16,992	14,854	13,928	13,158	13,484	15,112	187	0.04%	13.3%	12.5%
35 to 44	10,901	10,927	12,246	15,419	16,635	14,610	13,753	12,867	1,966	0.54%	9.7%	10.6%
45 to 54	12,035	11,657	10,497	10,722	11,830	15,029	16,142	14,017	1,982	0.49%	10.7%	11.6%
55 to 64	16,196	15,768	13,440	10,969	9,858	10,184	11,228	14,126	-2,070	-0.44%	14.4%	11.7%
65 to 74	12,617	12,985	14,295	13,881	11,767	9,697	8,772	9,023	-3,594	-1.08%	11.3%	7.4%
75 and above	9,619	9,867	11,707	13,666	15,359	15,833	14,798	13,145	3,526	1.01%	8.6%	10.8%

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

Table 116 – Projections of Total Number of Persons by Race and Ethnicity: Unincorporated County

RACE/ETHNIC GROUP	YEAR								2019-2050		2019	2050
	2019	2020	2025	2030	2035	2040	2045	2050	CHANGE	CAGR*	SHARE	SHARE
Uninc. Area excl. SOIs	112,111	112,162	115,162	116,663	118,063	119,289	120,352	121,217	9,106	0.25%	100.0%	100.0%
White	35,319	34,508	31,396	27,699	23,837	19,886	16,490	13,542	-21,777	-3.05%	31.5%	11.2%
Latino	61,946	62,813	68,280	73,291	78,530	83,842	88,540	92,695	30,750	1.31%	55.3%	76.5%
Black	3,117	3,124	3,191	3,252	3,288	3,289	3,249	3,180	64	0.07%	2.8%	2.6%
Asian	9,620	9,606	10,132	10,222	10,189	10,060	9,885	9,670	50	0.02%	8.6%	8.0%
Pacific Islander	67	67	74	77	83	88	101	108	42	1.58%	0.1%	0.1%
Native American	954	947	945	922	888	843	794	739	-214	-0.82%	0.9%	0.6%
Other	245	246	257	267	275	278	278	268	24	0.30%	0.2%	0.2%
Two or more	846	851	889	932	973	1,003	1,015	1,014	169	0.59%	0.8%	0.8%

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

Table 117 – Fresno County Unincorporated Household Income Projections

INCOME CATEGORY	NUMBER OF HOUSEHOLDS							
	2019	2020	2025	2030	2035	2040	2045	2050
Less than \$10,000	850	1,020	1,090	930	880	760	700	580
\$10,000 to \$24,999	3,360	3,890	3,700	3,170	3,030	2,830	2,750	2,520
\$25,000 to \$34,999	2,070	2,020	1,770	1,470	1,270	1,540	1,920	2,020
\$35,000 to \$49,999	6,810	7,460	5,090	4,250	2,850	1,710	1,420	2,600
\$50,000 to \$74,999	7,710	7,280	9,180	10,310	10,480	9,430	7,030	5,080
\$75,000 to \$99,999	2,670	2,550	3,340	3,690	4,180	5,260	7,090	7,620
\$100,000 to \$149,999	4,510	4,150	4,830	5,280	5,910	6,790	7,680	8,020
\$150,000 or more	4,370	4,000	4,760	5,220	5,770	6,190	5,990	6,290
Total	32,340	32,370	33,760	34,310	34,380	34,500	34,580	34,710
Mean Income	\$97,320	\$92,030	\$100,570	\$106,380	\$113,420	\$119,770	\$121,020	\$123,800
CAGR		-5.4%	1.8%	1.1%	1.3%	1.1%	0.2%	0.5%

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