



Central California

Center yourself!

Who We Are

California Central Valley Economic Development Corporation (CCVEDC) is a regional marketing group whose mission is to promote job creation.

8 County EDCs and PG&E

- Fresno
- Kern
- Kings
- Madera
- Merced
- San Joaquin
- Stanislaus
- Tulare



What We Do

One Contact for Eight Counties

- Assist in Site Selection
- Connect with resources and decision makers
- Provide research and demographics
- Facilitate permitting and planning
- Assist with state and local incentives
- Workforce Development coordination



Eight Counties, One Contact 888-998-2345



| SITE SELECTION | WHO WE ARE | KEY INDUSTRIES |
|--|---|---|
| CCVEDC offers free and confidential assistance with: <ul style="list-style-type: none">• Real Estate• Incentives• Regional Data• Site Tours | California Central Valley Economic Development Corporation (CCVEDC) <ul style="list-style-type: none">• San Joaquin• Stanislaus• Merced• Madera• Fresno• Kings• Tulare• Kern | <ul style="list-style-type: none">• Agribusiness & Food Processing• Health & Wellness• Manufacturing• Logistics• Energy |



Key Industries

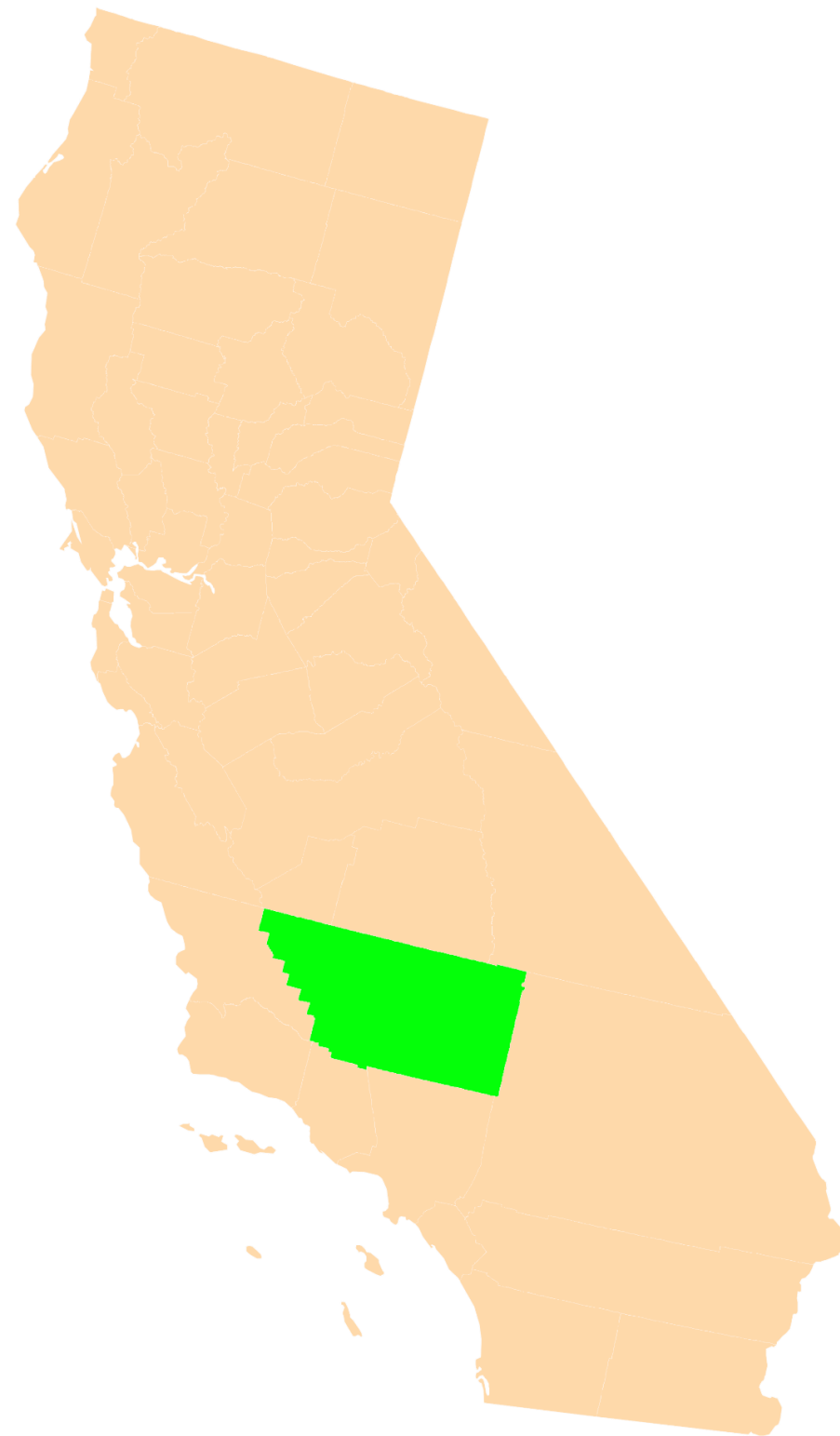
- Agribusiness and Food Processing
- Advanced Manufacturing
- Logistics and Distribution
- Energy
- Health and Wellness
- e-Commerce



San Joaquin Valley Fun Facts

- 8 counties, 62 cities
- Over 27,000 square miles
- 5th and 9th largest cities
- 24% population growth since 2000
- Largest Ag and Dairy counties the nation
- Largest Oil county in CA
- Largest cheese plant, ice cream plant, nut processors, solar and wind projects, wineries in the world





South Central Valley

Center yourself!

What is e-Commerce, Fulfillment and Regional Distribution?

e-Commerce Model: The buying and selling of products and services by businesses and consumers through an electronic medium. e-commerce is subdivided into three categories: business to business, business to consumer and consumer to consumer. This model is designed to reach a large area of consumers with an allowed two-day delivery system, and these operations typically require a larger facility (800,000-1,000,000 SF).

Fulfillment Model: Fulfillment comes from the analysis of the supply chain in relation to moving goods for product fulfillment purposes. This term “fulfillment” derives from the old term of “warehouse.” These centers are located relatively close to the customer and move an abundant amount of product in a short period of time. Some companies have their own fulfillment centers, while many smaller e-commerce companies outsource their warehousing, picking, packaging and shipping operations to external fulfillment companies. Many larger companies--with their own fulfillment centers--also handle warehousing and shipping for other sellers. *Amazon: Example of a large fulfillment model, in close proximity to the population for same-day delivery to the consumer.

Regional Distribution Model: Distribution centers are the foundation of a supply chain network, as they allow a single location to stock a vast number of products that are prioritized to be sent to the warehouse for distribution to other destinations. They are generally “big box” warehouses with multiple locations to serve consumers nationwide.



Economic Impacts: Logistics/Distribution Warehouses

670,000 SF Distribution/Ecommerce Fulfillment Center

| | Direct | Indirect & Induced | Total |
|------------------------|---------------|--------------------|-----------------|
| Number of Jobs Created | 642.0 | 136.6 | 778.6 |
| Salaries | \$910,636,871 | \$261,534,908 | \$1,172,171,779 |

860,000 SF Logistics/Distribution Center

| | Direct | Indirect & Induced | Total |
|------------------------|-----------------|--------------------|-----------------|
| Number of Jobs Created | 2,000.0 | 425.2 | 2,425.2 |
| Salaries | \$2,225,625,325 | \$639,199,593 | \$2,864,824,918 |

The Value of a Job

Whether the companies are large or small, the impact of every 100 jobs includes spending:

- **\$7,400,000** in residential real estate
 - **\$1,390,000** in car payments and insurance
 - **\$962,000** in recreation, entertainment and restaurants
 - **\$825,000** in clothing/apparel, furniture and appliances
 - **\$2,376,000** in business services
- ... and millions more in commercial real estate, housing, bank deposits, real estate taxes and others –
IN ONE YEAR!**



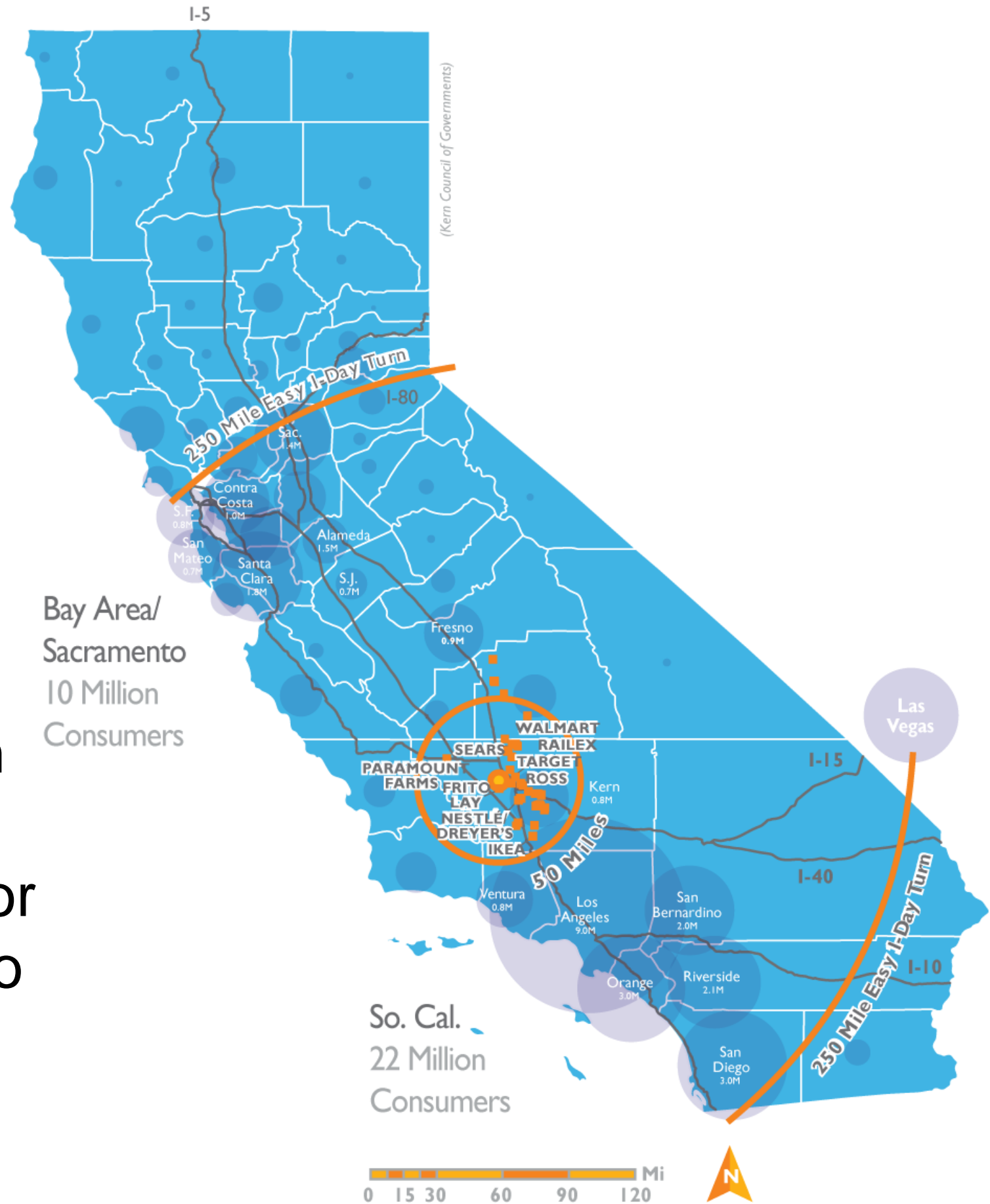
Occupational Wage Comparisons

| Occupational Title | Employment Estimates | Mean Hourly | Mean Annual |
|--|----------------------|----------------|------------------|
| General Operations & Managers | 3,440 | \$57.12 | \$118,818 |
| Transportation, Storage & Distribution Managers | 260 | \$43.26 | \$89,961 |
| Order Clerks | 420 | \$15.94 | \$33,165 |
| Shipping, Receiving & Traffic Clerks | 910 | \$16.93 | \$35,207 |
| Stock Clerks & Order Fillers | 3,800 | \$13.23 | \$27,518 |
| Executive Secretaries & Administrative Assistants | 750 | \$28.73 | \$59,754 |
| First-Line Supervisors of Transportation and Material/Vehicle Operators | 580 | \$22.79 | \$47,389 |
| Truck Drivers, Heavy & Tractor-Trailer | 4,820 | \$21.28 | \$44,260 |
| Industrial Truck & Tractor Operators | 1,230 | \$16.06 | \$33,395 |
| Laborers and Freight, Stock and Material Movers, Hand | 5,120 | \$15.86 | \$32,974 |
| Packers and Packages, Hand | 1,440 | \$12.75 | \$26,536 |

Distribution Centers Near Kern

There are over 50 distribution centers located within 50 miles of Kern County!

Kern County is the location with the lowest shipping cost and carbon footprint for facilities designed to ship to consumers statewide.



Education Partners

Bakersfield Community College:

Industrial Automation

California State University,

Bakersfield:

Engineering

Kern Economic Development

Foundation:

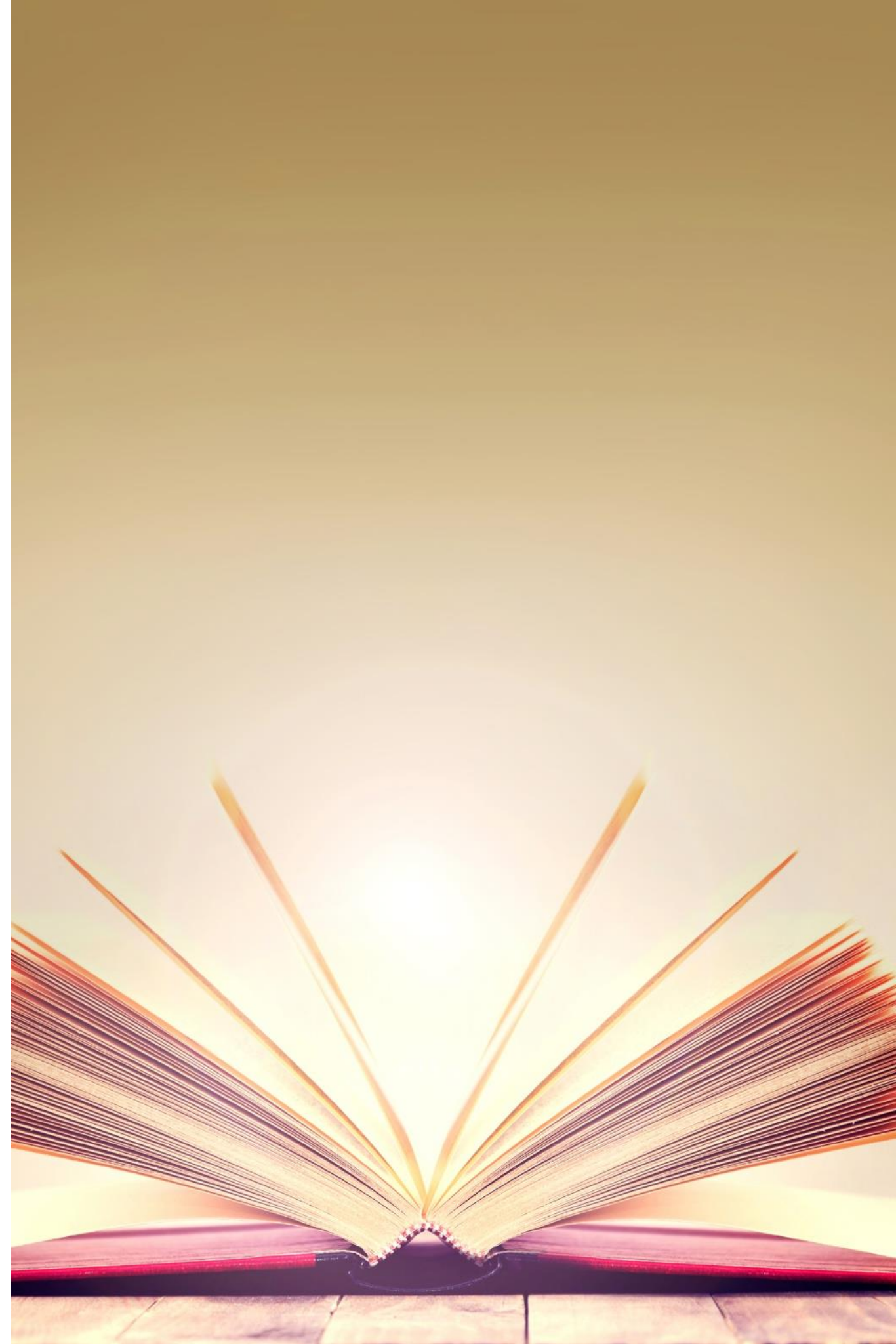
STEM

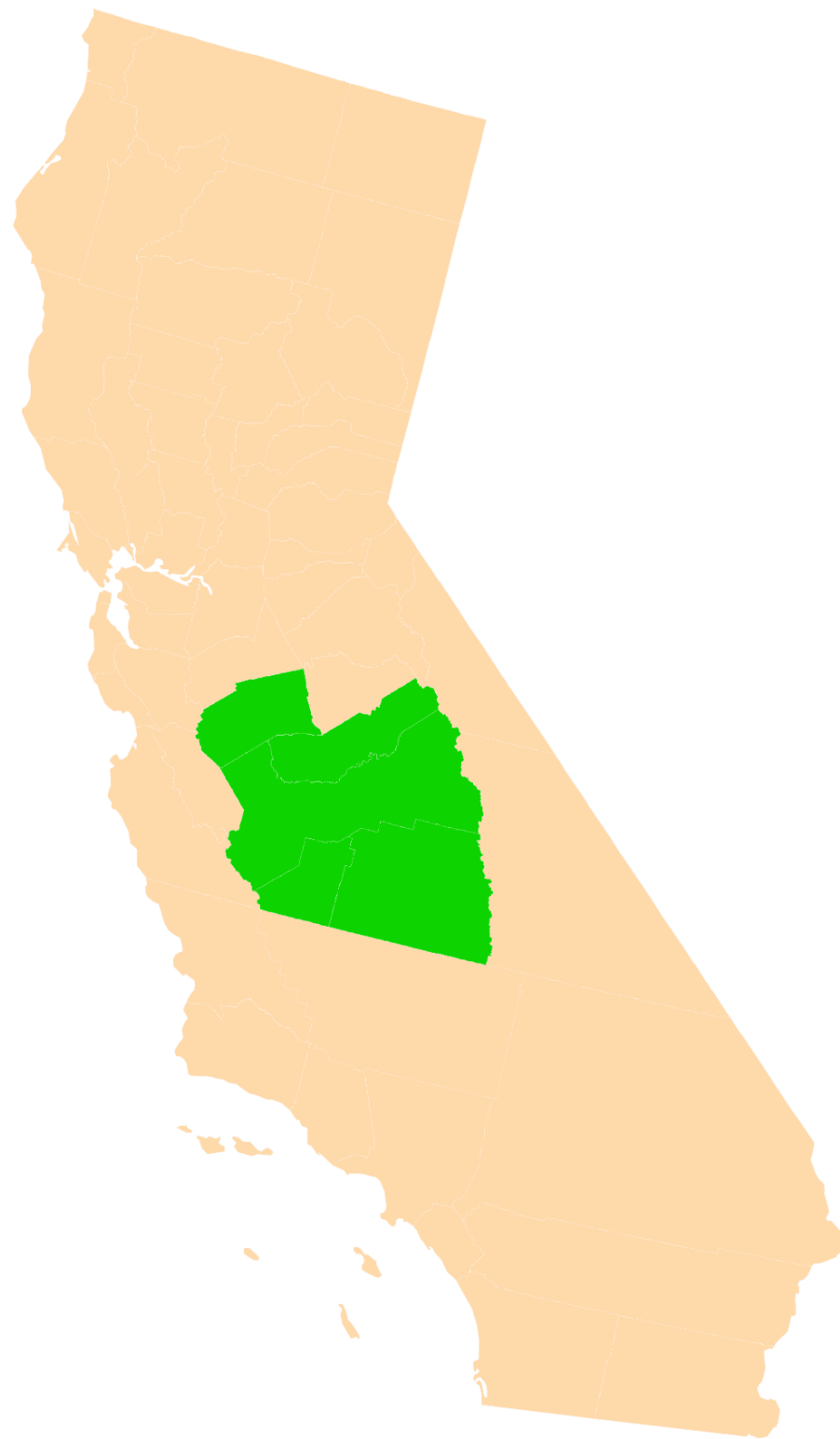
Kern High School District:

Regional Occupational Center

McFarland High School District:

Supply Chain Program

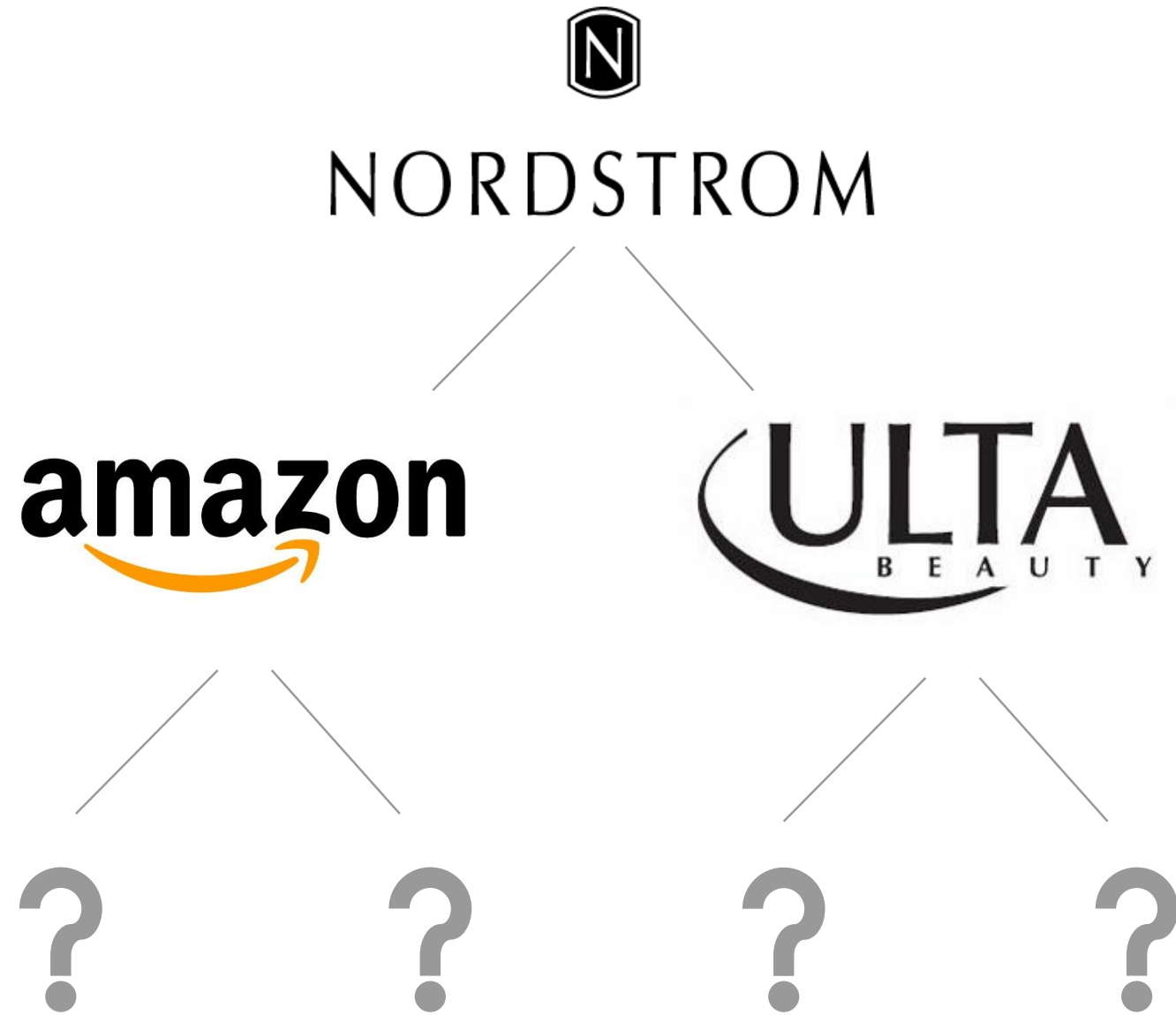




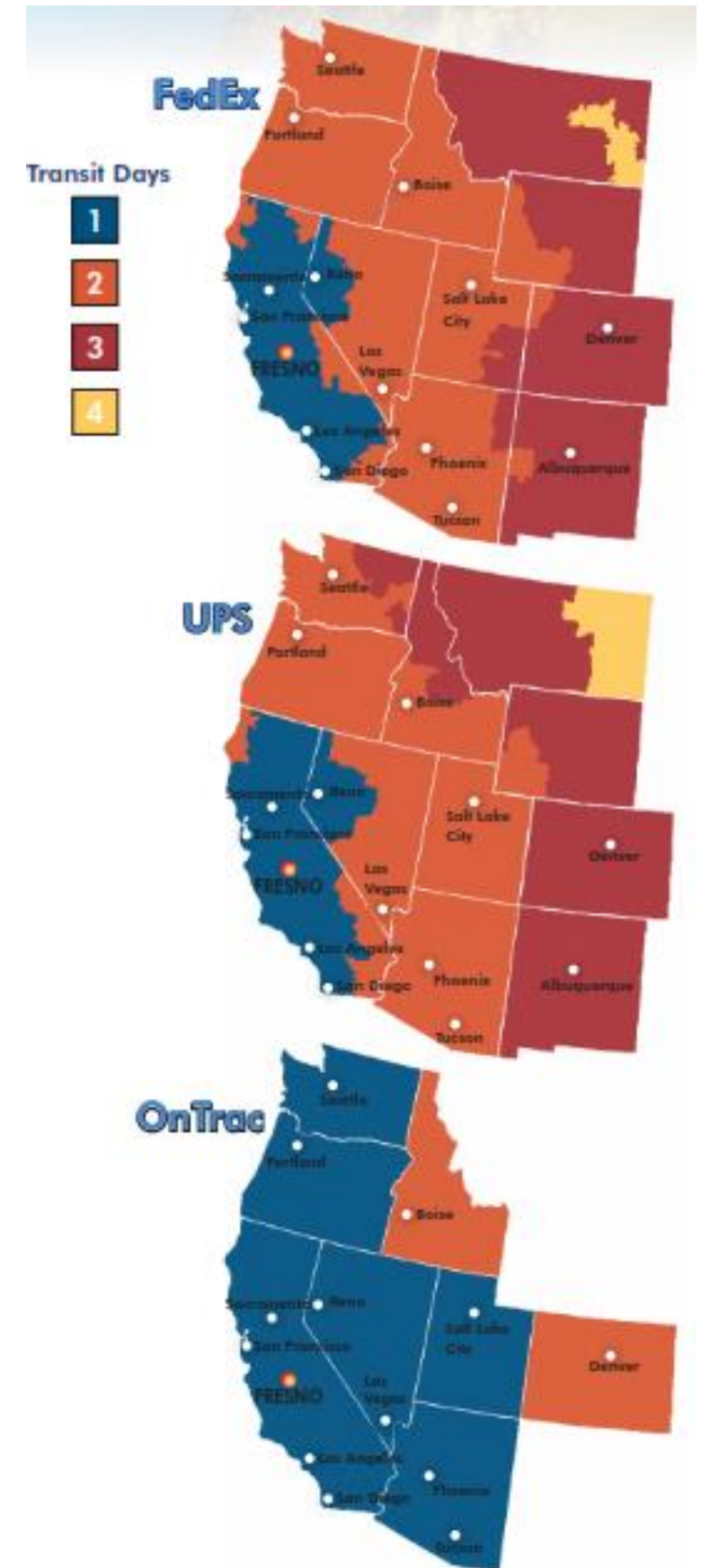
Mid-Central Valley

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e-Commerce



Ground Package Delivery Transit Days





- 855,000 SF
- 2,000 Full-Time New Jobs
- \$200 million Total Investment



- 670,000 SF
- 542 Full-Time New Jobs
- \$110 million Total Investment



Brick-and-Mortar

VS

E-Commerce

94% total sales at
Brick-and-Mortar

200 Million Digital
Shoppers in 2015

Teens and Seniors
both enjoy the first-hand
in-store experience

$\frac{3}{4}$ of surveyed
US adults shop online

\$4.5 Trillion

Brick-and-Mortar sales

\$390 Billion

E-Commerce sales



Changing Landscape of Retail



Existing Manchester Mall



Proposed Changes to Manchester Mall

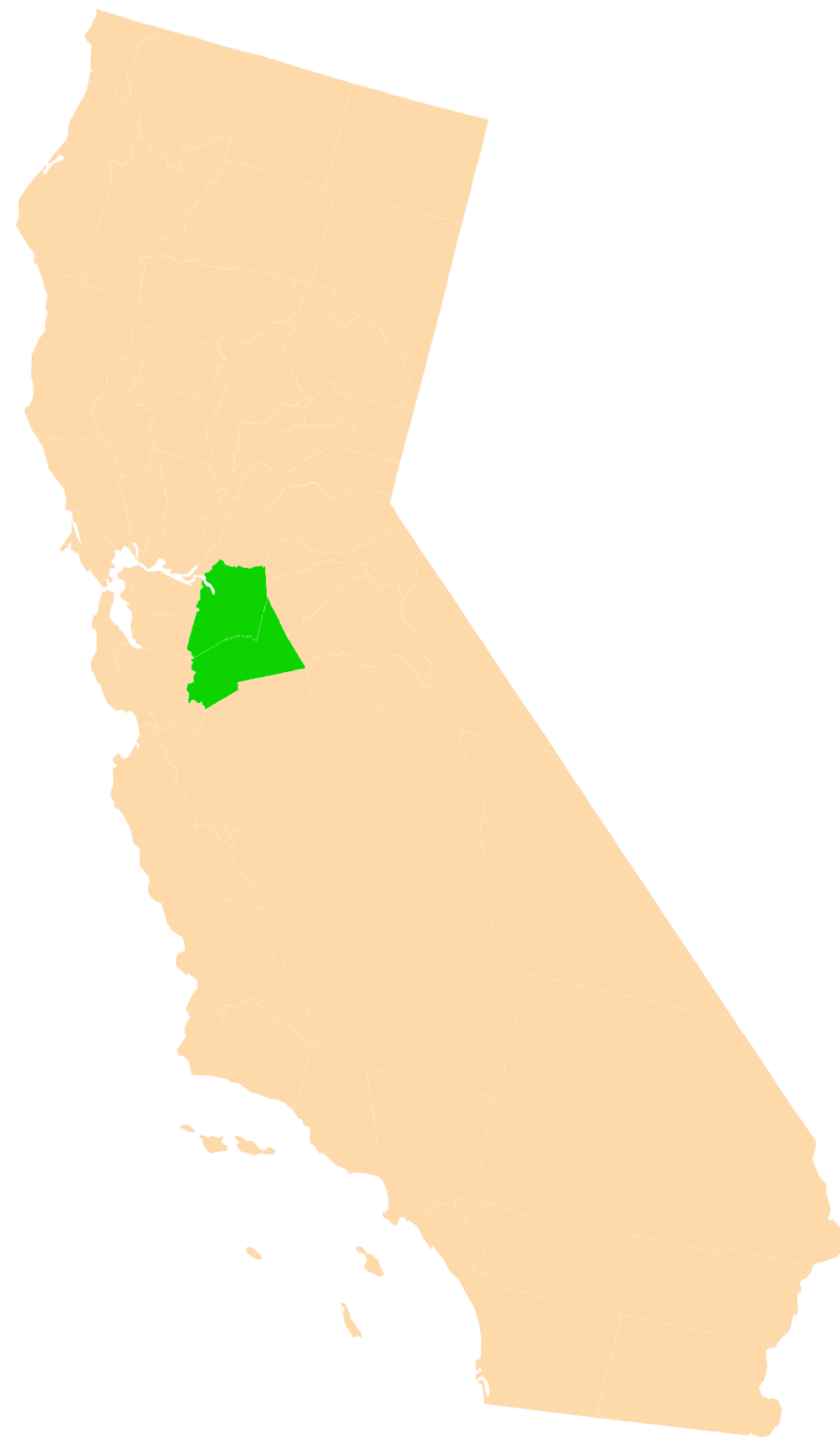
Changing Landscape of Retail



Former Sierra Vista Mall



Updated Sierra Vista Mall



North Central California

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North SJV Map

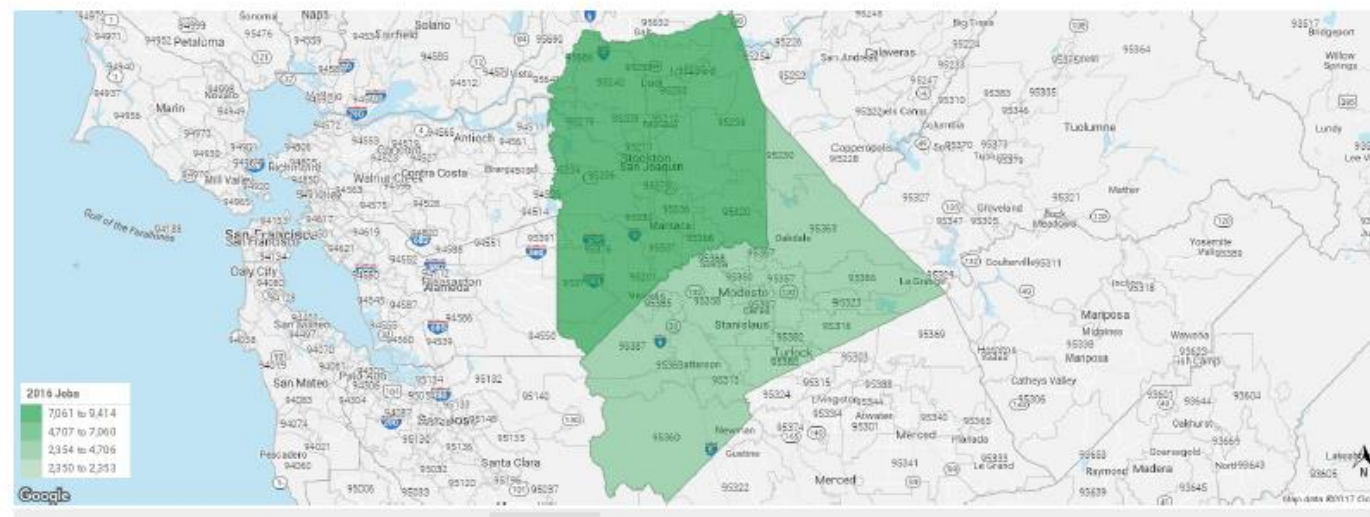
- 90 Miles to Bay Area Market
- Total Population: 1.2M +
- Transportation Corridor
 - I5
 - HWY99
 - I205
- Stockton, pop. 300,000
- Modesto, pop. 211,000
- Tracy, pop. 85,000
- Manteca, pop. 72,000
- Turlock, pop. 70,000
- Lodi, pop. 63,000



Fulfillment & Distribution Centers

| Company Name | City | Employees |
|-----------------------------------|-----------|-----------|
| Safeway Distribution Center | Tracy | 1,800 |
| Amazon Fulfillment Center | Tracy | 1,500 |
| Amazon Fulfillment Center | Tracy | 1,500 |
| Amazon Fulfillment Center | Patterson | 750 |
| CVS Caremark Distribution Center | Patterson | 490 |
| W.W. Grainger Distribution Center | Patterson | 260 |
| Amazon Fulfillment Center | Stockton | 250 |
| In-N-Out Distribution | Lathrop | 200 |
| Kohl's Distribution Center | Patterson | 150 |
| Restoration Hardware | Patterson | 150 |
| Dollar Tree Distribution Center | Stockton | 145 |
| Costco Distribution Depot | Tracy | 120 |
| Toys R Us Distribution Center | Stockton | 100 |
| Winco Foods Distribution Center | Modesto | 100 |

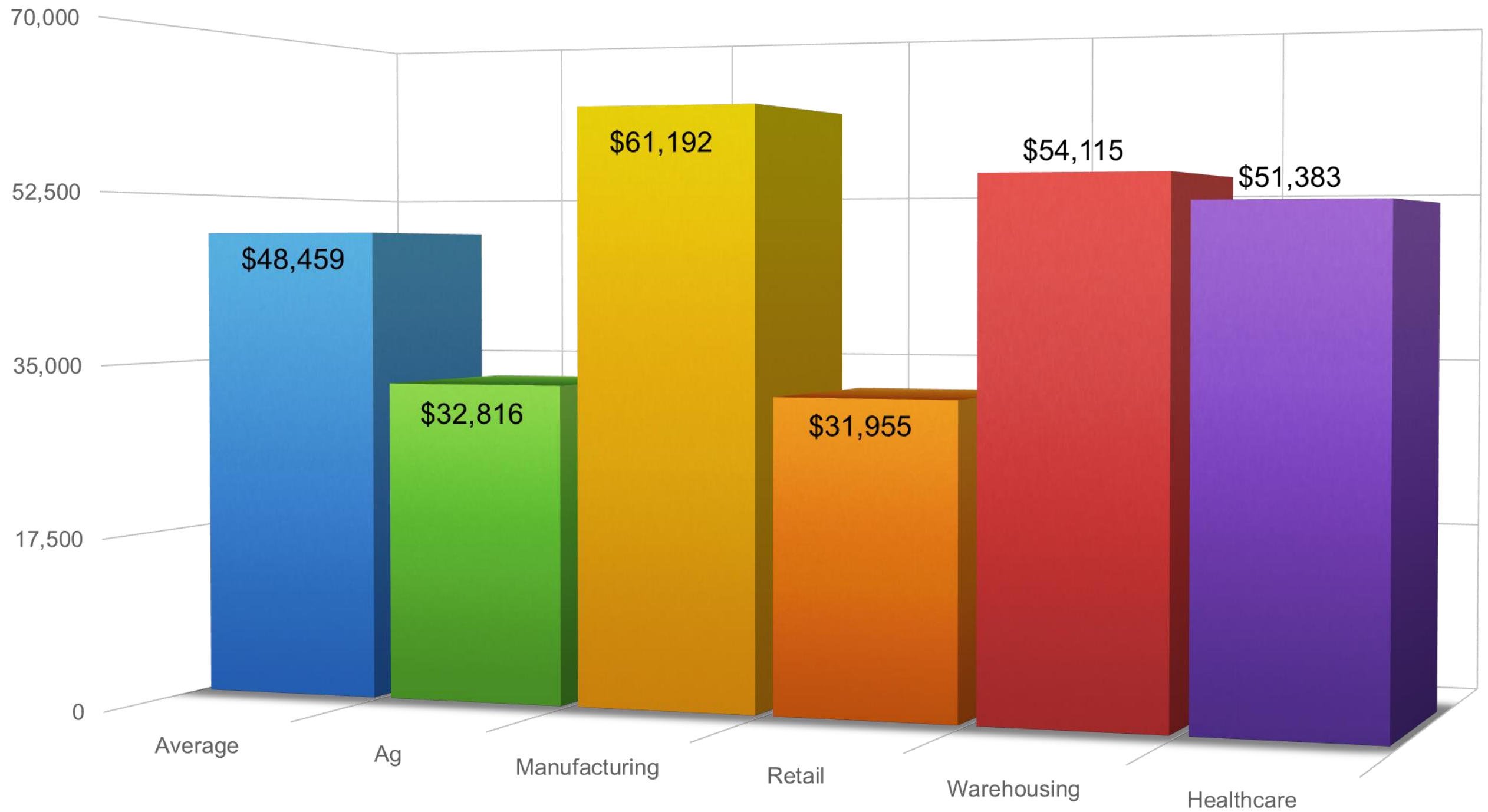
Gross Numbers & Wages



| County Name | 2016 Jobs | Starting Hourly |
|---------------------------|-----------|-----------------|
| San Joaquin Stanislaus | 13,000 | \$13.50-\$14.25 |

Wages By Industry – Central Valley

2015



Workforce Training Adaptation

- Education Realizing Need for Vocational Training
- CTE Programs Highly Important & Valued
- Designed to Meet Needs of Local Industry
 - Patterson High School Supply Chain & Logistics
 - Modesto Junior College Logistics Program





Any Questions?



www.centralcalifornia.org

or

Call 888-998-2345