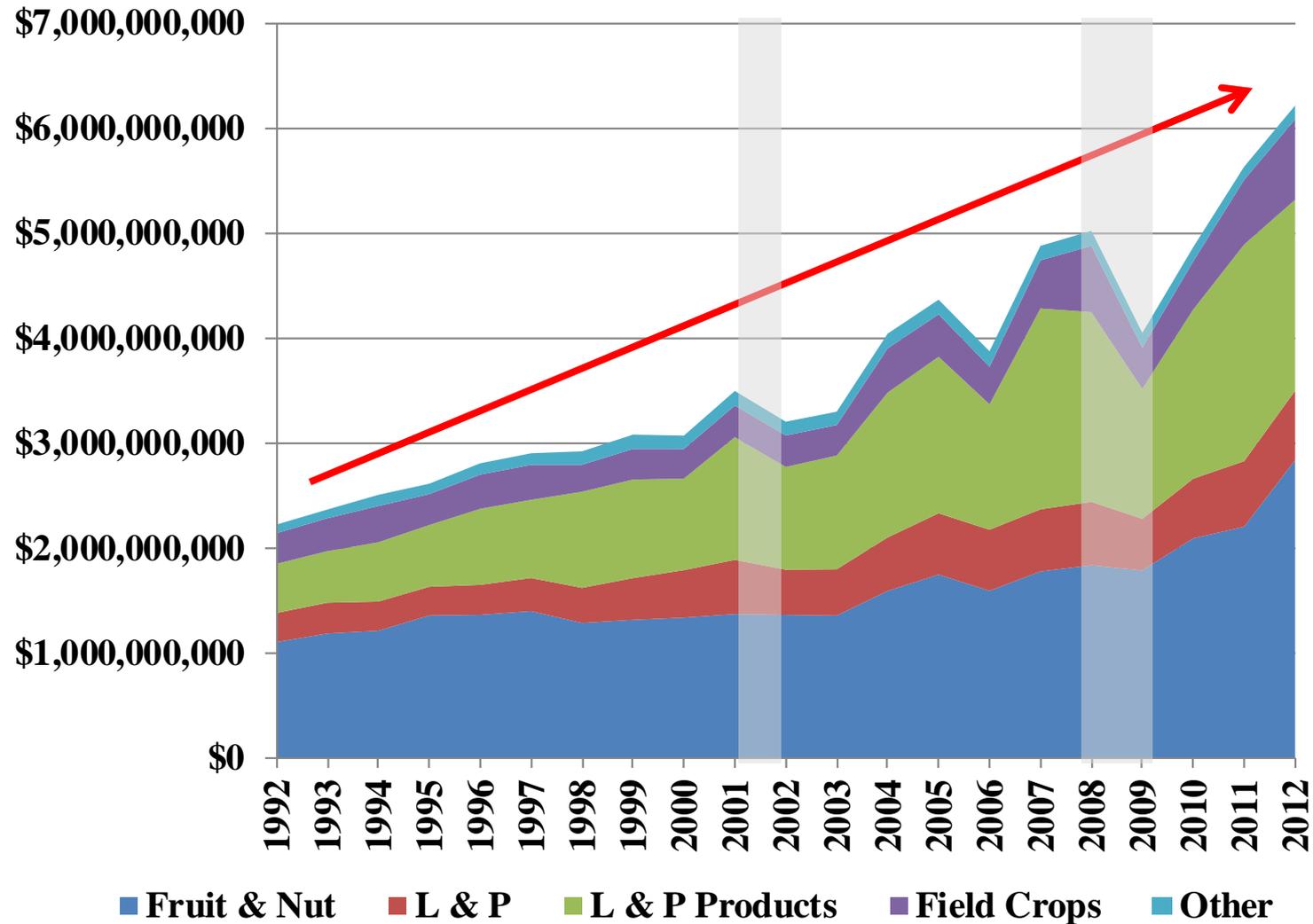


The Agriculture Value Chain in Tulare County

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Tulare County Board of Supervisors

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Total Gross Production Value by Commodity in Tulare County: 1992-2012



SOURCE: "Agricultural Crop and Livestock Report", Tulare County Agricultural Commissioner

Top 15 Commodities Produced in California

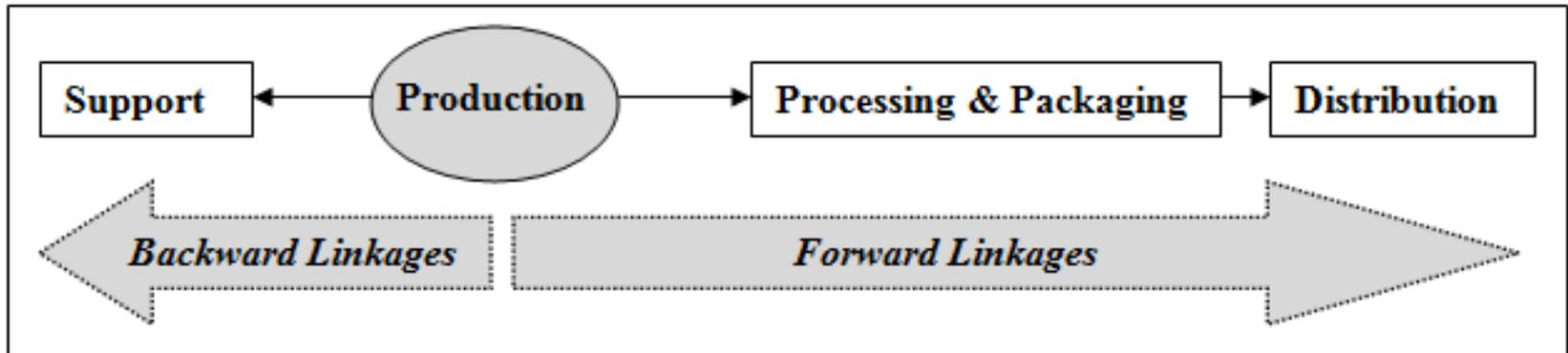
Rank	Gross Value (1,000)	Commodity	Highlights by Rank and County
1	\$ 7,644,914	Milk and Cream	Tulare leads again with close to 27 % of the State total
2	\$ 4,563,104	Grapes (All)	Fresno leads again, followed closely by Kern and Tulare
3	\$ 3,720,144	Almonds	Fresno overtakes Kern this year, Stanislaus follows in 3rd place
4	\$ 3,096,554	Cattle & Calves (All)	Tulare is #1, followed by Fresno and Kern, Imperial is ranked 4th this year
5	\$ 2,487,594	Nursery Products	San Diego continues to lead with close to 27% of the State total
6	\$ 2,149,830	Berries, Strawberries	Monterey and Ventura lead with more than 62% of the total
7	\$ 2,056,385	Lettuce	Monterey leads with over 63%, Imperial follows with over 12%
8	\$ 1,523,452	Alfalfa Hay	Kern leads with over 16%, followed by Imperial at over 12%
9	\$ 1,477,967	Walnuts (English)	San Joaquin leads with nearly 19 percent, followed by Butte
10	\$ 1,126,656	Oranges	Tulare leads with a little over half the State total
11	\$ 1,032,686	Silage (All)	Tulare holds almost 30 percent of the total
12	\$ 987,695	Chickens	Fresno leads with over 47%, Merced follows with almost 29%
13	\$ 963,554	Tomatoes (Processing)	Fresno leads with over 38%, followed by Kings and Yolo this year
14	\$ 946,163	Cotton Lint	Fresno and Kings hold over 65% of the State total
15	\$ 933,651	Pistachios	Kern leads with more than 41% of the total

SOURCE: 2011 California County Agricultural Commissioner's Report

→ **Milk production** represents an important direct source of jobs (5,858), of labor income (\$86.2 million annually) and of domestic and foreign exports (\$1.6 billion annually) for Tulare County.

The Agricultural Value Chain Clusters

→ Modern agriculture comprises more than farming and ranching production:



SOURCE: Agricultural Value Chain: California," Centers of Excellence, June 2011

→ Agricultural production is closely linked to other industries such as transportation, manufacturing, professional services, etc.

→ Use of IMPLAN to assess the value of the entire Ag Value Chain.

Economic Contribution of the Agricultural Value Chain in Tulare County

Total Market Value of the Agricultural Value Chain in Tulare County: 2012

CLUSTER	Direct	Indirect	Induced	Total
Support		\$ 361,596,526	\$ 37,741,475	\$ 399,338,001
Production	\$ 6,120,693,000	\$ 486,736,779	\$ 750,547,936	\$ 7,357,977,716
Processing and Packaging		\$ 215,457,086	\$ 6,044,093	\$ 221,501,180
Distribution		\$ 39,349,471	\$ 49,022,929	\$ 88,372,400
	\$ 6,120,693,000	\$ 1,103,139,861	\$ 843,356,433	\$ 8,067,189,296

SOURCE: Author's calculations based on IMPLAN data

Total Employment by the Agricultural Value Chain in Tulare County: 2012

CLUSTER	Direct	Indirect	Induced	TOTAL
Support		12,907	509	13,416
Production	14,323	2,956	6,468	23,747
Processing and Packaging		199	13	212
Distribution		204	653	857
TOTAL	14,323	16,266	7,643	38,232

SOURCE: Author's calculations based on IMPLAN data

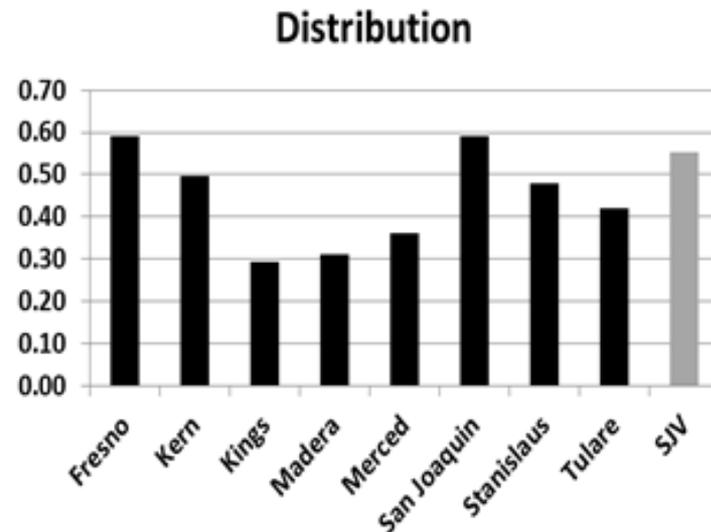
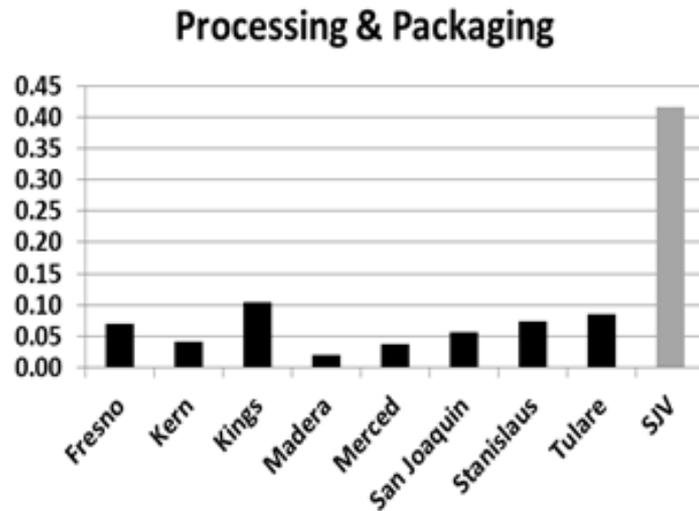
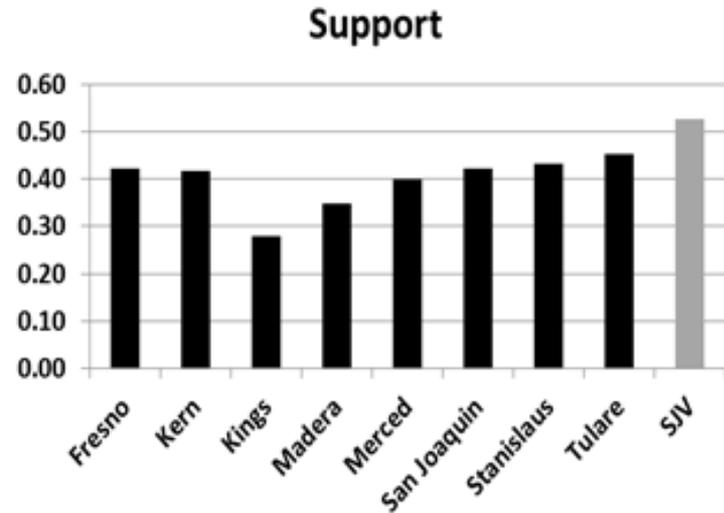
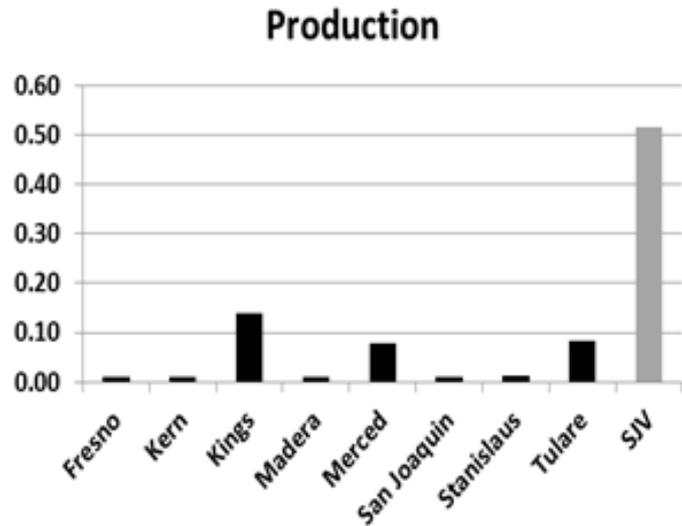
Regional Gross Domestic Product (GDP) and the Contribution of the Agricultural Production Cluster: 2011

	GDP (USD)	Contribution to SJV's GDP	Production Cluster Contribution to County's GDP
Fresno	\$34,554,283,243	25.08%	9.02%
Kern	\$34,466,252,592	25.02%	5.75%
Kings	\$5,201,090,508	3.78%	12.92%
Madera	\$4,473,309,228	3.25%	18.21%
Merced	\$7,138,907,987	5.18%	16.20%
San Joaquin	\$21,766,102,243	15.80%	5.56%
Stanislaus	\$16,479,864,046	11.96%	5.86%
Tulare	\$13,674,247,786	9.93%	18.73%
SJV	\$137,754,057,633	100%	9.06%

SOURCE: Author's calculations based on IMPLAN data

- Tulare's agricultural production cluster exhibits the largest contribution to the County's economy with **18.73%**, which is more than twice the average for the entire SJV.
- Agricultural production is relatively more important for Tulare than for any other county in the SJV.

2011 Regional Purchase Coefficients (RPCs): Agricultural Production Chain



SOURCE: Author's calculations based on IMPLAN data

Agricultural Employment Projections: County Summary

COUNTY	Agriculture Occupations Summary					
	Annual Average Employment		Employment Change		Wages	
	2008	2018	Numerical	Percent	Median Hourly	Median Annual
Fresno*	93,960 (25.8%)	104,270 (24.6%)	10,310	11.0%	\$16.7	\$34,692
Kern*	82,750 (27.6%)	93,960 (26.4%)	11,210	13.5%	\$18.2	\$37,888
Kings*	13,660 (29.1%)	15,140 (28.1%)	1,480	10.8%	\$16.5	\$34,251
Madera	17,638 (34.8%)	17,848 (33.1%)	210	1.2%	\$17.4	\$36,095
Merced	23,990 (31.0%)	24,630 (30.9%)	640	2.7%	\$16.8	\$34,989
San Joaquin*	55,010 (24.5%)	63,560 (23.8%)	8,550	15.5%	\$17.4	\$36,115
Stanislaus*	44,508 (23.5%)	45,938 (25.3%)	1,430	3.2%	\$16.6	\$34,476
Tulare	57,680 (34.9%)	60,520 (34.3%)	2,840	4.9%	\$15.8	\$32,955
SJV	389,196 (27.4%)	425,866 (26.5%)	36,670	9.4%	\$16.9	\$35,183

SOURCE: SOURCE: Author's calculations based on data from the CA EDD

- For SJV it is expected that agricultural occupations as a fraction of total occupations will slightly fall by 2018 **to 26.5%**.
- **HOWEVER:** for Tulare County, this same indicator is projected to remain the largest in the region with **34.3%**.

Agricultural Employment Projections for Tulare County

Agriculture Occupation	Annual Average		Employment Change		Wages	
	2008	2018	Numerical	Percent	Median Hourly	Median Annual
Farm, Ranch, and Other Agricultural Managers	3,300	3,960	660	20.0%	\$34.74	\$72,254
Farmers and Ranchers	4,880	4,560	-320	-6.6%	N/A	N/A
Management Analysts	270	290	20	7.4%	\$29.84	\$62,078
Landscaping and Groundskeeping Workers	1,490	1,630	140	9.4%	\$11.47	\$23,868
Sales Representatives, Wholesale and Manufacturing	830	850	20	2.4%	\$26.35	\$54,808
Bookkeeping, Accounting, and Auditing Clerks	1,800	1,930	130	7.2%	\$16.40	\$34,109
Customer Service Representatives	1,160	1,320	160	13.8%	\$13.94	\$28,991
Stock Clerks and Order Fillers	1,950	2,120	170	8.7%	\$10.09	\$20,983
Office Clerks, General	2,810	3,000	190	6.8%	\$11.39	\$23,695
Agricultural Workers	28,460	29,770	1,310	4.6%	N/A	N/A
Supervisors -Farming, Fishing, & Forestry Workers	1,300	1,420	120	9.2%	N/A	N/A
Food Batchmakers	730	770	40	5.5%	\$16.55	\$34,408
Packaging and Filling Machine Operators	860	830	-30	-3.5%	\$10.66	\$22,165
Driver/Sales Workers	320	340	20	6.3%	\$8.76	\$18,216
Heavy and Tractor-Trailer Truck Drivers	2,160	2,550	390	18.1%	\$16.01	\$33,284
Industrial Truck and Tractor Operators	1,040	1,060	20	1.9%	\$11.38	\$23,685
Laborers and Material Movers	2,400	2,350	-50	-2.1%	\$11.14	\$23,173
Packers and Packagers, Hand	1,920	1,770	-150	-7.8%	\$8.94	\$18,603
Total, Agriculture Occupations	57,680	60,520	2,840	4.9%	\$15.84	\$32,955
Total, All Occupations	165,400	176,500	11,100	6.7%	\$13.27	\$27,614

SOURCE: SOURCE: Author's calculations based on data from the CA EDD

Exporting and Local Serving Agricultural Value Chain

Sectors: Tulare County, 2011

NAICS	Industry Title	Employment				TULARE		Employment Growth		TULARE SS	Sector Classification	Avg. Annual Earnings
		TULARE		CALIFORNIA		LQ 2002	LQ 2011	TULARE 2002-2011	CALIFORNIA 2002-2011			
		2002	2011	2002	2011							
1111	Oilseed and Grain Farming	29	131	2,410	2,979	0.54	1.86	352%	24%	328%	GB	\$34,362
1112	Vegetable and Melon Farming	93	190	33,572	32,480	0.12	0.25	104%	-3%	108%	E	\$22,889
1113	Fruit and Tree Nut Farming	7,399	4,415	85,065	95,291	3.92	1.96	-40%	12%	-52%	DB	\$24,410
1114	Greenhouse and Nursery Production	825	1,034	35,046	26,327	1.06	1.66	25%	-25%	50%	GB	\$25,738
1119	Other Crop Farming	2,847	985	30,242	13,256	4.24	3.14	-65%	-56%	-9%	DB	\$27,645
1121	Cattle Ranching and Farming	4,355	5,479	22,257	23,048	8.81	10.04	26%	4%	22%	GB	\$30,970
1123	Poultry and Egg Production	186	56	3,968	2,808	2.11	0.84	-70%	-29%	-41%	SD	\$20,931
1129	Other Animal Production	208	181	2,296	2,207	4.08	3.46	-13%	-4%	-9%	DB	\$30,727
1151	Support Activities for Crop Production	17,080	23,511	151,334	182,280	5.08	5.45	38%	20%	17%	GB	\$19,634
3111	Animal Food Manufacturing	165	388	3,868	3,637	1.92	4.50	135%	-6%	141%	GB	\$62,450
3115	Dairy Product Manufacturing	1,630	2,402	16,366	17,289	4.49	5.87	47%	6%	42%	GB	\$54,383
3118	Bakeries and Tortilla Manufacturing	92	45	40,238	39,644	0.10	0.05	-51%	-1%	-50%	SD	\$24,963
3119	Other Food Manufacturing	632	669	17,627	24,084	1.61	1.17	6%	37%	-31%	DB	\$30,920
3331	Ag., Construction, and Mining Machinery	281	240	5,483	5,206	2.31	1.95	-15%	-5%	-10%	DB	\$46,511
3339	Other General Purpose Machinery Mfg	252	255	21,024	16,672	0.54	0.65	1%	-21%	22%	E	\$48,945
4244	Grocery Product Merchant Wholesalers	563	735	77,347	96,532	0.33	0.32	31%	25%	6%	E	\$49,515
4245	Farm Product Merchant Wholesalers	94	69	1,766	1,634	2.40	1.78	-27%	-7%	-19%	DB	\$64,270
4249	Misc Nondurable Goods Merchant Whsle	506	484	49,600	47,109	0.46	0.43	-4%	-5%	1%	E	\$67,711
4442	Lawn & Garden Equipment/Supplies Stores	139	202	13,589	10,103	0.46	0.84	45%	-26%	71%	E	\$41,279
4451	Grocery Stores	2,223	2,702	263,272	285,806	0.38	0.40	22%	9%	13%	E	\$24,668
4452	Specialty Food Stores	460	234	40,682	31,083	0.51	0.32	-49%	-24%	-26%	DB	\$29,341
4453	Beer, Wine, and Liquor Stores	65	38	12,409	13,174	0.24	0.12	-42%	6%	-48%	DB	\$23,397
484	Truck Transportation	1,730	1,897	110,708	106,196	0.70	0.75	10%	-4%	14%	E	\$41,643
4931	Warehousing and Storage	1,681	1,532	58,545	67,317	1.29	0.96	-9%	15%	-24%	DB	\$34,796
5222	Nondepository Credit Intermediation	312	216	75,703	47,707	0.19	0.19	-31%	-37%	6%	E	\$58,530
5324	Machinery & Equipment Rental & Leasing	61	29	14,253	14,500	0.19	0.08	-52%	2%	-54%	DB	\$60,729
5413	Architectural and Engineering Services	423	273	158,003	157,881	0.12	0.07	-35%	0%	-35%	DB	\$52,726
5416	Management & Technical Consulting Svc	95	327	102,318	178,991	0.04	0.08	244%	75%	169%	E	\$52,378
5417	Scientific Research and Development Svc	80	76	91,572	118,698	0.04	0.03	-5%	30%	-35%	DB	\$51,124
5419	Other Professional & Technical Services	291	307	57,239	62,753	0.23	0.21	5%	10%	-4%	DB	\$35,834
5613	Employment Services	3,752	3,797	422,901	344,348	0.40	0.47	1%	-19%	20%	E	\$22,527
5617	Services to Buildings and Dwellings	1,254	1,416	194,389	195,105	0.29	0.31	13%	0%	13%	E	\$25,783
5619	Other Support Services	86	70	29,143	26,323	0.13	0.11	-19%	-10%	-9%	DB	\$33,343
9241	Administration of Environmental Programs	225	204	12,651	12,600	0.80	0.68	-9%	0%	-9%	DB	\$39,361

Exporting and Local Serving Agricultural Value Chain Sectors: Tulare County, 2011

EXPANDING → Most expanding industry sectors in Tulare County belong to the **production cluster**, which reflects the competitive advantage of Tulare County in agricultural production.

EMERGING → General purpose machinery manufacturing and truck transportation are the sectors within the agricultural value chain that exhibit the characteristics to become sources of wealth and job creation.

DECLINING → Sectors that show declining trends with the potential of becoming disruptive given the relative large number of jobs they support as well as the relative high pay:

Other food manufacturing (**NAICS 3119**)

Agricultural construction and mining machinery (**NAICS 3331**)

Warehousing and storage (**NAICS 4931**)

Thanks!

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