

CROWSBIZPARK.BIZ
"Creating Jobs Where People Live"



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LOCAL COMMUNITY PROFILE

Nestled within the Central Valley of California, **Stanislaus County** is located in one of the largest agricultural production areas in the world. With over **550,000 people** calling this area home, its nine incorporated cities reflect a region rich in diversity and a strong sense of community.

Stanislaus County is conveniently located within **90 minutes of San Francisco** and the **Silicon Valley**, and within a **5-hour drive of Los Angeles** – two of the world's largest markets. The mild Mediterranean climate and rich soils make it one of the best agricultural areas in the world.

Welcome to Stanislaus County – an affordable and strategic business location with competitive wages, vibrant and diverse communities, competitive land costs, and an available workforce. When the time comes to make a decision about where to locate your business, Stanislaus County should rise to the top of your list.









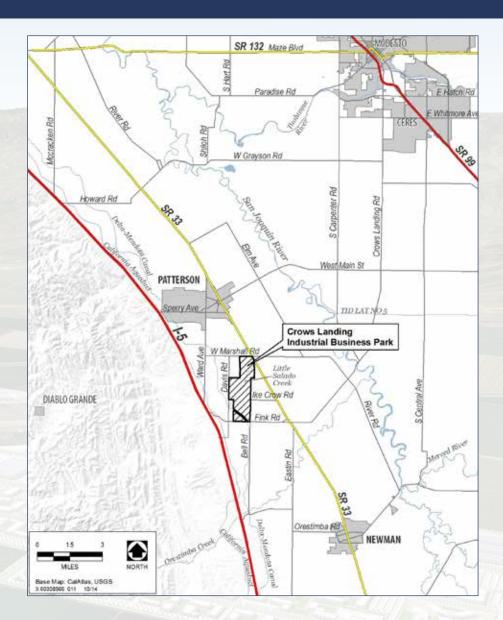




LOCATION OF THE PARK

CLIBP is located on Fink Road in western Stanislaus County, less than 2 miles east of the Fink Road/I-5 interchange and in the midst of an extensive transportation network that includes:

- The Interstate Highway System, including access to I-5 and I-580, which provides an approximately 1 hour drive to the San Francisco Bay Area and the maritime Ports of Oakland, San Francisco, and West Sacramento.
- Adjacent to CA Highway 33, which provides access to the Port of Stockton.
- Proximity to CA Highway 99, a major North-South highway that traverses the state of California.







552,620

Population (2018)

Population **grew by 28,000** over the last 5 years and is projected to **grow by 20,665** over the next 5 years.

212,479

Jobs (2018)

Jobs grew by 23,775 over the last 5 years and are projected to grow by 13,504 over the next 5 years. \$54.3K

Median Household Income (2017)

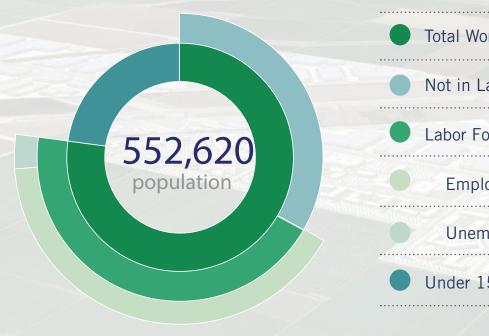
Median household income is **\$3.4K below** the national median household income of \$57.7K.

\$303K

Avg Home Price (2018)

The average cost of a home is nearly **\$200K less** than the state average.

2018 LABOR FORCE BREAKDOWN



Total Working Age Population	428,021
Not in Labor Force (15+)	181,698
Labor Force	246,323
Employed	229,831
Unemployed	16,492
Under 15	124,599

Source: Emsi Q3 2019 Data Set I www.economicmodeling.com

HISTORY OF THE PARK

The Crows Landing Air Facility and citizens of Stanislaus County proudly served our nation for more than 50 years. Commissioned in 1942 as an auxiliary airfield to Naval Auxiliary Air Station Alameda. From 1942 until its closure in 1997, the Crows Landing facility was developed and redeveloped by the federal government to support the missions of the United States Navy, Coast Guard and the National Aeronautics and Space Administration (NASA).

Crows Landing Industrial Business Park (CLIBP) is a reuse project, transforming the site of the former Crows Landing Naval Air Facility into an **1,528-acre industrial park.**







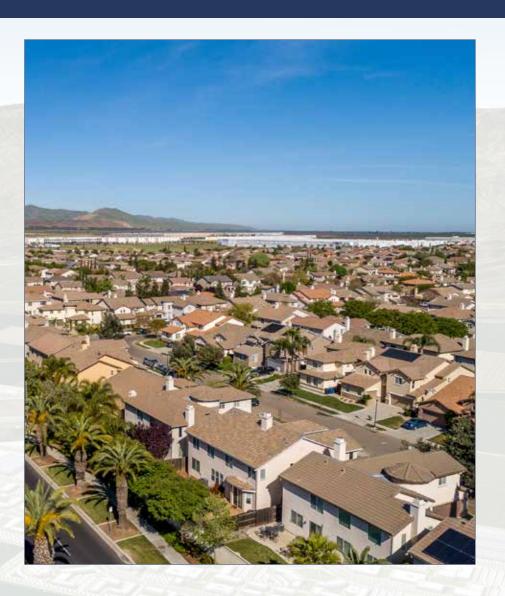


CLIBP's vision is to transform **1,528 acres** of the former Crows Landing Naval Air facility into a vibrant, regional employment and business center that capitalizes on infrastructure and location to provide sustainable-wage jobs in Stanislaus County.

The CLIBP provides an attractive location to the County, developers, and the business community. The project provides County residents with employment opportunities that do not require long commutes on the region's congested roadways, leading to a reduction in vehicle miles traveled and air quality benefits.

Stanislaus County is being discovered by companies of all types as a great place to do business. **E.&.J Gallo Winery, Foster Farms, Frito-Lay, Blue Diamond Growers, 5.11 Tactical** and **Amazon** all call Stanislaus County home.

The development community has a unique opportunity for creative and profitable investment through the creation of strong public/private partnerships in this county.



WHY INVEST?



Development forecasts have identified a resurgence in the need for industrial sites, specifically sites that offer more than 1 million square feet of buildable area. CLIBP offers developers the opportunity for large parcel development, nearby transportation infrastructure through connections to the I-5 corridor and San Francisco Bay Area, a future on-site airport, and a vibrant local workforce. The site offers unparalleled opportunities for logistics, goods movement/distribution, manufacturing/light industrial, and business park development uses.

- Only an hour from the largest tech market in the world
- Only 30 minutes from the largest food processing hub in the world
- CLIBP is California Environmental Quality Act (CEQA) certified, saving investors time and money
- CLIBP is a designated **Opportunity Zone** providing significant Federal Tax benefits for investors
- Logistical powerhouse located within miles of both highways I-5 and 99 and within 90 miles of the Port of Oakland and 35 miles from the Port of Stockton
- Future onsite airport reusing one of the former military runways measuring 5,400 feet
- Large building sites (> 1M SF) are available
- Development flexibility including parcel size, location, and land uses
- Skilled and available local workforce



CLIBP ECONOMIC POTENTIAL

IMPACT TYPE	JOBS	LABOR INCOME (\$)	VALUE ADDED (\$)	OUTPUT (\$)
Direct Effect	15,385	1,054,446,922	1,529,820,200	4,710,789,064
Indirect Effect	10,679	764,436,564	1,178,984,771	2,174,628,919
Induced Effect	9,813	542,564,828	970,939,267	1,585,487,725
Total Effect	35,876	2,361,448,314	3,679,744,237	8,470,905,709

At full buildout the CLIBP has the potential to produce over **15,000 direct jobs** and **\$4.7 billion** in **Output**. When including indirect and induced effects, the employment potential is over **35,000 jobs** and **\$8.5 billion** in **Output**.

The analysis above was performed using an input/output model IMPLAN that is comprised of software and regional data sets, calibrated to reflect assumptions provided in the CLIBP Specific Plan. This analysis reflects results for the Year 2040 and accounts for inflation.

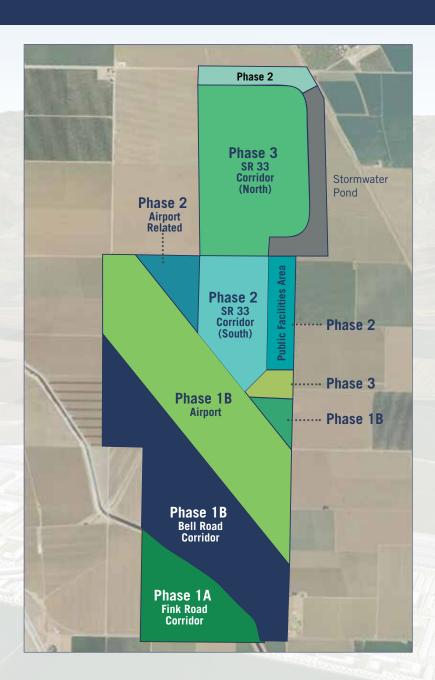
TOP 10 SECTORS IDENTIFIED IN ECONOMIC ANALYSIS

IMPACT TYPE	JOBS	LABOR INCOME (\$)	VALUE ADDED (\$)	OUTPUT (\$)
PLASTICS AND RESIN MATERIAL	1,514	134,069,114	374,950,151	2,030,572,688
ALL OTHER FOOD MANUFACTURING	3,047	155,246,645	197,039,356	1,051,157,492
WHOLESALE TRADE	1,313	108,122,741	221,021,817	326,849,173
WAREHOUSING AND STORAGE	2,913	148,775,264	189,641,637	306,745,891
EMPLOYMENT AND PAYROLL OF LOCAL GOV'T NON-EDUCATION	1,913	212,383,779	233,329,528	233,329,525
REAL ESTATE	720	28,876,980	155,549,029	198,343,856
BUSINESS SUPPORT SERVICES	3,461	120,922,422	110,058,029	186,634,377
OWNER-OCCUPIED DWELLINGS	0	0	114,146,036	175,968,780
MANAGEMENT OF COMPANIES & ENTERPRISES	585	82,938,989	101,090,062	157,160,731

COUNTY COMMITMENT TO SUCCESS

To demonstrate its commitment to site development and job creation, the County is providing initial site-related investments such as:

- Preparation of the CLIBP Specific Plan to streamline future building applications and review processes.
- Completion of environmental background studies and a certified Environmental Impact Report (EIR) to fulfill initial permitting requirements pursuant to the California Environmental Quality Act (CEQA).
- Initial site planning to streamline future development applications and review processes.
- Investment in initial infrastructure development through the completion of site studies, design, and the development of initial on-site water supply, wastewater, stormwater, power, and road infrastructure (Phase 1A).



GENERAL LAND USES

CLIBP is a unique industrial business park designed to support flexibly-sized site and building formats and accommodate a variety of users in a campus environment. Diverse uses from office and incubation spaces for small start-up firms, facilities for mid- to large-size offices and corporate headquarters, to large floor plan warehouse and light manufacturing facilities, including those with one million square feet or more, are desirable in the Central Valley and may be located within the CLIBP.

Of the 1,528-acre property conveyed to the County, approximately 1,274 acres will be developed for a mix of aviation-compatible industrial and business park uses, general aviation, aviation-related land uses, public facilities, and a multimodal (bicycle/pedestrian) transportation corridor. The remaining acreage will be associated with necessary infrastructure, including roads and right-of-ways for stormwater drainage, water supply, wastewater facilities, and dry utilities.

APN(s): 027-001-057 to 059; 027-003-074 to 080. Census Tract ID: 34.00.

LAND USE	DESCRIPTION	PHASE 1A	PHASE 1B	PHASE 2	PHASE 3	TOTAL ALL PHASES
LOGISTICS/ DISTRIBUTION	Packaging, warehouse, distribution, etc.	52	138	57	102	349
LIGHT INDUSTRIAL	Light industrial manufacturing, machine shops, etc.	41	110	71	128	350
BUSINESS PARK	Research and development, business support services, etc.	10	28	14	26	78
PUBLIC FACILITIES	Government offices, professional offices, emergency services, etc.	0	15	35	18	68
GENERAL AVIATION	Airport runways, aprons, hangars, etc.	0	370	0	0	370
AVIATION RELATED	Parcel distribution, aviation classroom, training, etc.	0	0	46	0	46
MULTIMODAL TRANSPORTATION CORRIDOR/ GREEN SPACE	Bicycle and pedestrian trail, greenway, monument to military use	0	0	13	0	13
ALL USES BY PHASE		103	661	236	274	1,274
INFRASTRUCTURE	Internal roadways, water and wastewater systems, stormwater drainage, etc.					
TOTAL ACRES						1,528

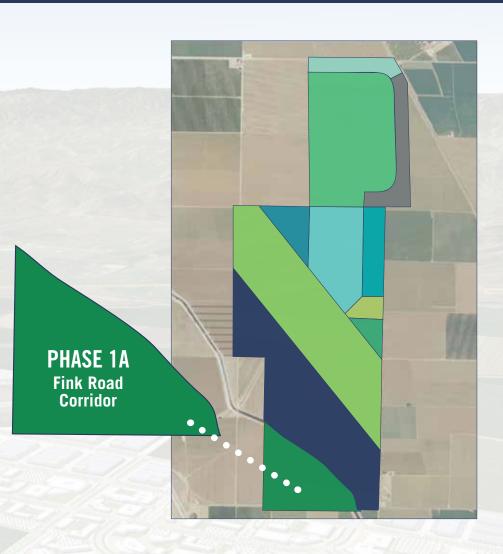


PHASE 1A

Development is likely to occur adjacent to Fink Road due to its proximity to I-5. CLIPB development is envisioned on 103 acres including:

- Logistics (52 acres)
- Manufacturing/Light Industry (41 acres)
- Business Park (10 acres)
- Initial Infrastructure

Approximately 1,300 jobs could be realized during Phase 1A.



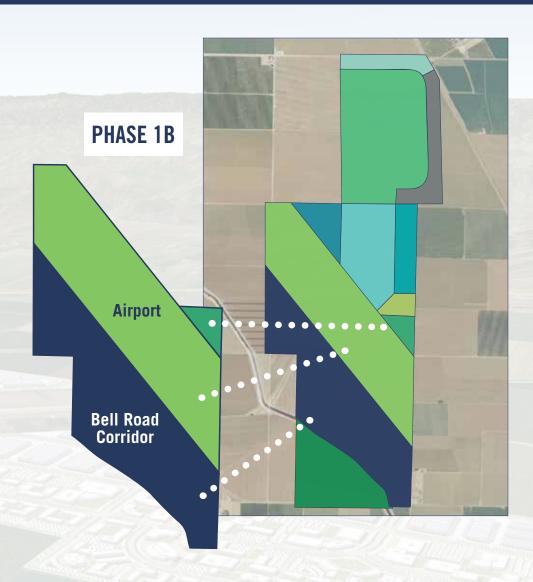
PHASE 1B

Site Development is envisioned to extend northward from the Fink Road Corridor and extend through the Bell Road Corridor during Phase 1B. Airport development will also begin.

Development would occur on approximately 661 acres and include:

- Logistics (138 acres)
- Manufacturing/Light Industry (110 acres)
- Business Park (28 acres)
- Airport (370 acres)
- Public Facilities (15 acres)
- Infrastructure

Approximately 4,000 jobs could be realized during Phase 1B.

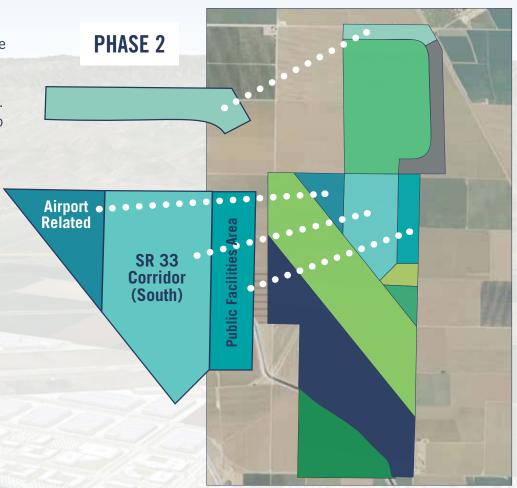




Phase 2 development is envisioned in the central portion of the site. Additional facilities would be developed in the Highway 33 Corridor north of the airport during Phase 2, along with airport improvements and the development of Public Facilities. Infrastructure and roadway improvements would be provided to support anticipated development on 236 acres including:

- Manufacturing/Light Industry (71 acres)
- Logistics/Warehouse (57 acres)
- Business/Office (14 acres)
- Public Facilities (35 acres)
- Aviation-related (cargo, industrial, business park)
 (46 acres)
- Greenspace/Monument (13 acres)
- Ongoing Airport/Infrastructure Development

Approximately **3,500 to 4,000 jobs** could be realized during Phase 2.

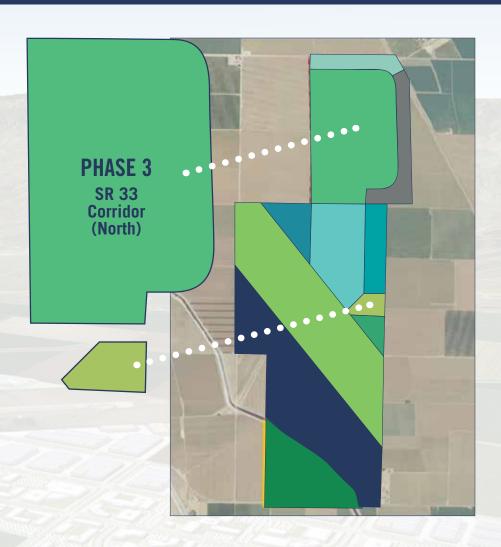


PHASE 3

Phase 3 is envisioned in the northernmost part of the site, where businesses can capitalize on their proximity to Highway 33. Ongoing infrastructure and roadway improvements would be provided to support anticipated development on 274 acres including:

- Manufacturing/Light Industry (128 acres)
- Logistics/Warehouse (102 acres)
- Business/Office (26 acres)
- Public Facilities (18 acres)
- Ongoing Airport/Infrastructure development

Approximately **5,000 to 5,200 jobs** could be realized during Phase 3.





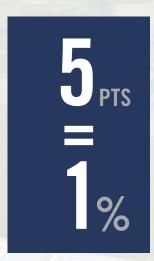
STANISLAUS COUNTY LARGE INDUSTRIAL INVESTMENT INCENTIVE PROGRAM

Program applicants may receive a discount in the amount of **County Public Facilities Fees (PFF)** paid based on a sliding scale, with the maximum discount reaching **50% in the Manufacturing sector** and up to **60% in Warehouse and Distribution sectors.** The amount of the discount is determined by a point system based on the project's anticipated positive impacts to the County. With every **5 points**, the applicant gains a **1% discount** in the PFF.

The minimum project size for participation in the Program is 150,000 sq. ft. for warehouse projects and 100,000 sq. ft. for manufacturing and distribution projects. Office space is not included in the square footage calculation. Cannabis industry projects are not eligible for this incentive. Industrial facilities greater than 300,000 square feet can qualify for an additional **5% discount** above any discount determined based on the criteria listed above.







CLIBP ENHANCED INFRASTRUCTURE FINANCING DISTRICT

CLIBP is uniquely positioned to maximize the effectiveness of an **Enhanced Infrastructure Financing District (EIFD)**.

EIFD's are a form of **Tax Increment Financing (TIF)** that local agencies may establish for a project or geographic area to capture incremental increases in property tax revenue for future onsite development and maintenance.

The EIFD is a built-in funding mechanism used to build roads, parks, sewage and water facilities, flood control and drainage, and transit-oriented projects among others for up to a 45-year period.

The CLIBP EIFD will enable incremental increases in property tax revenue generated from development in the CLIBP to be reinvested into the CLIBP. Businesses within the CLIBP EIFD will know that its property tax is being reinvested toward further industrial park development.

While an EIFD is not an incentive in the traditional sense, it is an assurance to the CLIBP businesses that Stanislaus County is committed to the development of a booming economic center.

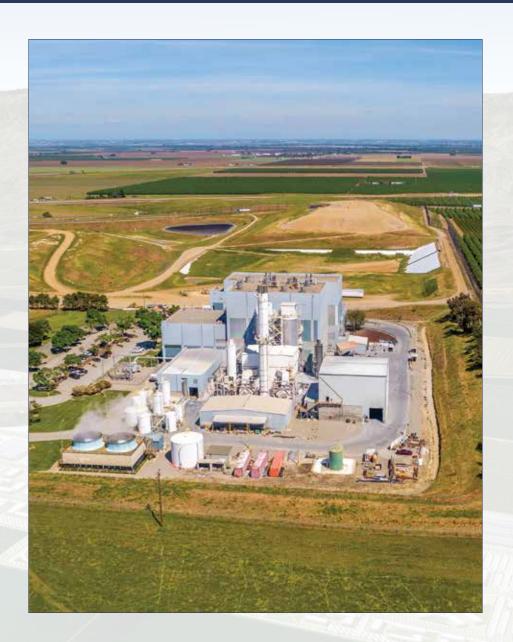




SUSTAINABLE WASTE MANAGEMENT

The Covanta Stanislaus, Inc., Energy from Waste facility is located less than 5 miles from the Crows Landing Industrial Business Park. This facility transforms 800 tons of waste per day into approximately 200,000-pounds of steam per operating hour. The steam is currently being used for generation of 22.5 megawatts of clean renewable electricity. This electricity is equivalent to an estimated electrical consumption of approximately 20,000 homes. While the facility is currently only using the steam for electricity generation, Covanta operates similar plants that provide steam and electricity to business and municipalities for power, heating, and cooling needs of their clients.

Through the Assured Destruction program, Covanta safely and securely destroys materials for clients at temperatures approaching 2,000 °F, while at the same time generating clean renewable energy. The facility is proud to be a zero-water discharge plant. All wastewater generated on-site is treated and reused in the process. Covanta's mission is to ensure no waste is ever wasted.



OPPORTUNITY ZONES: BACKGROUND

Opportunity Zones are a provision of the federal Tax Cuts and Jobs Act of 2017 designed to spur growth in low-income communities by encouraging reinvestment of capital gains into **Qualified Opportunity Funds.**

Census Tracts meeting specific requirements related to poverty rate and median family income were designated by State and Federal Governments as Opportunity Zones. CLIBP (Census Tract 34) is one of seventeen census tracts in Stanislaus County designated as an Opportunity Zone.

A Qualified Opportunity Fund is an investment vehicle that is set up as either a partnership or corporation for investing in eligible property that is in an Opportunity Zone and that utilizes the investor's gains from a prior investment for funding the Opportunity Fund. A Fund must hold at least 90% of its assets in qualifying property.

Real estate and businesses located in Opportunity Zones are generally eligible for investment. Federal Treasury Regulations provide in depth detail about qualifying investments, however, generally:

- Opportunity Funds may hold an interest in real estate located in an Opportunity Zone and develop real estate properties.
- Opportunity Funds may invest in for-profit entities located in an Opportunity Zone (i.e. incubators, business accelerators, startups, etc.).
- Investments must meet certain "substantial improvement" requirements.

For additional information on Opportunity Zones visit **opzones.ca.gov.**









An investor who has triggered a capital gain by selling an asset like stocks or real estate can receive special tax benefits if they roll that gain into an opportunity fund within 180 days.

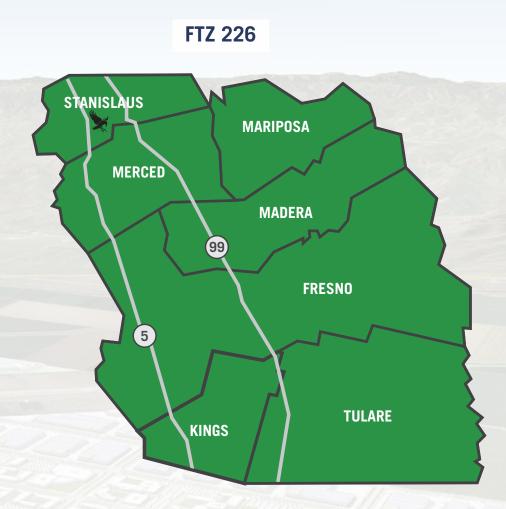
CROWS LANDING INDUSTRIAL BUSINESS PARK FOREIGN TRADE ZONE

A U.S. Foreign Trade Zone is a designated area which, for customs purposes, is considered outside the United States. CLIBP is in Merced County Regional Foreign Trade Zone 226 (FTZ 226).

Foreign Trade Zones allow companies to enter product or materials into the United States custom and duty free until the product leaves the zone and officially enters the U.S. market.

They are a geographic area where goods may be landed, handled, manufactured or reconfigured, and re-exported without the intervention of customs authorities. Only when the goods are moved to consumers within the country in which the zone is located do they become subject to the prevailing customs duties.

The FTZ program is a way to meaningfully reduce duty payments for the importation of goods used in domestic production, and can be a beneficial program to manufacturers, distributors, and industrial property owners alike.



WHERE PRODUCTS MEET MARKETS

Crows Landing is adjacent to the Silicon Valley, San Francisco Bay Area, Southern California, Western United States and the Pacific Rim.

Transportation access to major markets and the Pacific Rim are key strategic advantages of locating or expanding a business in Stanislaus County. Two of California's major north-south routes intersect the area: Interstate 5 and Highway 99 provide convenient and efficient means of shipment to all major markets by rail, air or truck line carriers. Deep-water ports in Oakland and Stockton are within 90 minutes.



ESTIMATED TRANSIT DAYS

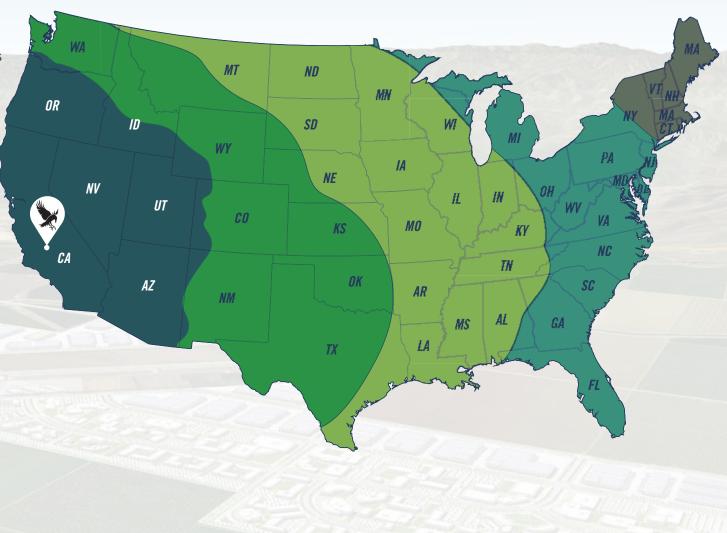
Stanislaus County is served by the two largest rail providers in the country, the **Union Pacific** and **BNSF**, both of which provide access into fully improved industrial parks and other county locations.



Transit Days:

1 Day
2 Days
3 Days
4 Days
5 Days

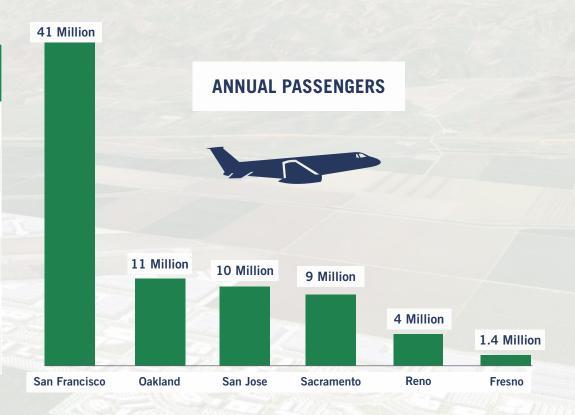
Canada and Mexico within 1 day



AIR ACCESS

With access to major International Airports within 90 miles of Stanislaus County and minutes from the CLIBP General Aviation Airport including San Francisco (13 minutes), San Jose (10 minutes), Oakland (12 minutes) and Sacramento (23 Minutes), a business can access 80 commercial airlines and over 4,700 weekly flights.

AIRPORTS	AIRLINES SERVED	WEEKLY FLIGHTS	ANNUAL PASSENGERS
San Francisco	47	2130	41 million
Oakland	12	1269	11 Million
San Jose	13	1083	10 Million
Sacramento	10	1000	9 Million
Reno	9	910	4 Million
Fresno	8	240	1.4 Million

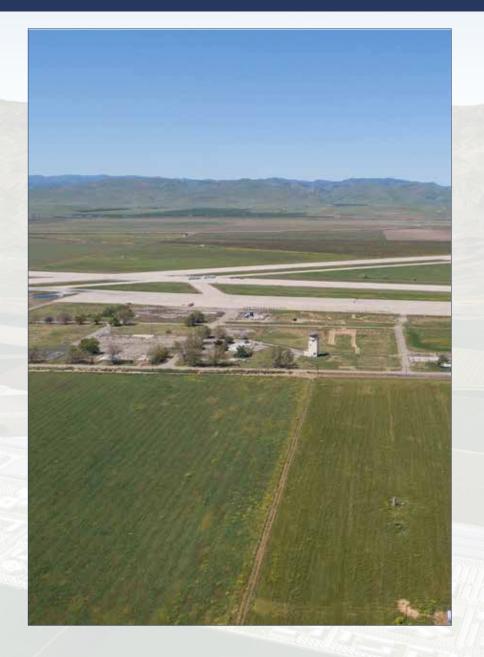


ACCESS TO INTERNATIONAL AIRPORTS

			Single-en- gine Piston	Turboprop	Jet
Average Speed in K	nots		150	250	275
DESTINATION	STATUTE MILES	NAUTICAL MILES	FLIGHT TIME I	FROM CROWS L	ANDING (MIN)
San Francisco	70	61	24	15	13
Oakland	65	57	23	14	12
San Jose	50	44	18	11	10
Sacramento	93	107	43	26	23
Reno	163	188	75	45	41
Fresno	98	113	45	27	25

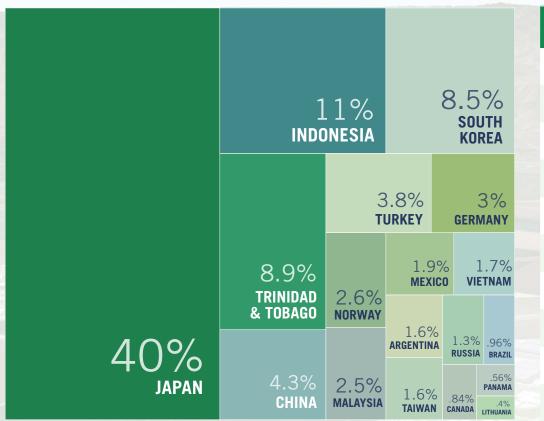
Notes:

Average speeds for turboprop and jets are lower than their cruise speeds due to short distance, complicated airspace, need to follow defined arrival routes, and need to coordinate with air traffic control.





TOP TRADING COUNTRIES



RANK	PORT	YEAR TO DATE EXPORT VALUE
1	Japan	\$410.04 M
2	Indonesia	\$109.55 M
3	Trinidad and Tobago	\$91.2 M
4	South Korea	\$86.76 M
5	China	\$44.03 M
6	Turkey	\$38.82 M
7	Germany	\$30.74 M
8	Norway	\$26.86 M
9	Malaysia	\$26.06 M
10	Mexico	\$19.52 M

Source: www.ustradenumbers.com/port/port-of-stockton-calif/

PORT OF OAKLAND

TOP TRADING COUNTRIES

		1	. 2% Japan			7°, SOUT KORE	Ή
		2.7% INDIA	2.2% FRANCE	2.1 THAIL			ALY 7%
	6.1% TAIWAN	2.5% germany	1.9% SPAIN 1.8%	1.3%	RLANDS 1.1 MEXI		1%
31% china	3.4% VIETNAM	2.3% australia	1.6% MALAYSIA	UNITED KINGDOM 1.1% NEW ZEALAND	.76% UNITED ARA EMIRATE .64% TURKE	B .59% BELGIUM .36%	

RANK	PORT	YEAR TO DATE Export value
1	China	\$15.58 B
2	Japan	\$6.18 B
3	South Korea	\$3.5 B
4	Taiwan	\$3.04 B
5	Vietnam	\$1.67 B
6	India	\$1.35 B
7	Germany	\$1.26 B
8	Australia	\$1.15 B
9	France	\$1.09 B
10	Thailand	\$1.03 B

212,479

Total Regional Employment

Jobs **grew by 23,775** over the last 5 years and are projected to **grow by 13,504** over the next 5 years. 6.4%

Unemployment Rate

The 2018 unemployment rate **decreased 1.1%** from 2017.

\$17.06/hr

Median Earnings

Regional median earnings are **\$1.48/hr below** the national median earnings of \$18.54/hr.

43%

Commute

43% of Stanislaus County's employed **workforce commutes** outside of the County to obtain jobs with sustainable wages.

Stanislaus County has experienced one of the highest unemployment rates in California. The County's primary goal is to create jobs where people live, and it is committed to working with the development community and private investors to secure opportunities for the available local workforce.

Source: Emsi Q3 2019 Data Set I www.economicmodeling.com

EARNINGS DATA

\$22.87/hr

Average Earnings

\$12.21/hr

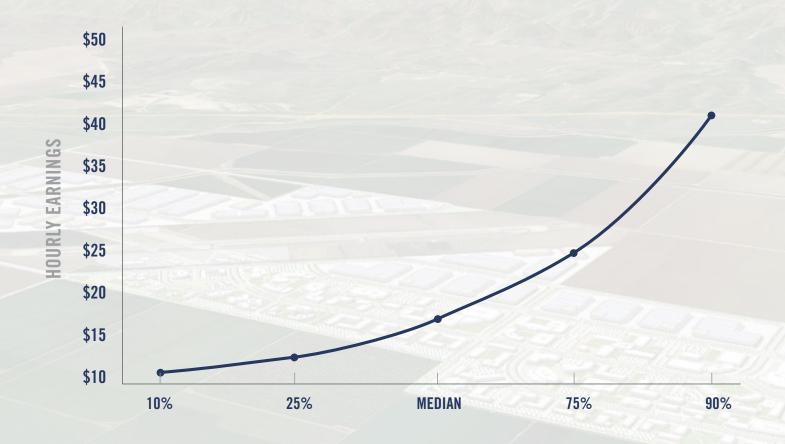
25th Percentile Earnings

\$17.06/hr

Median Earnings

\$26.71/hr

75th Percentile Earnings





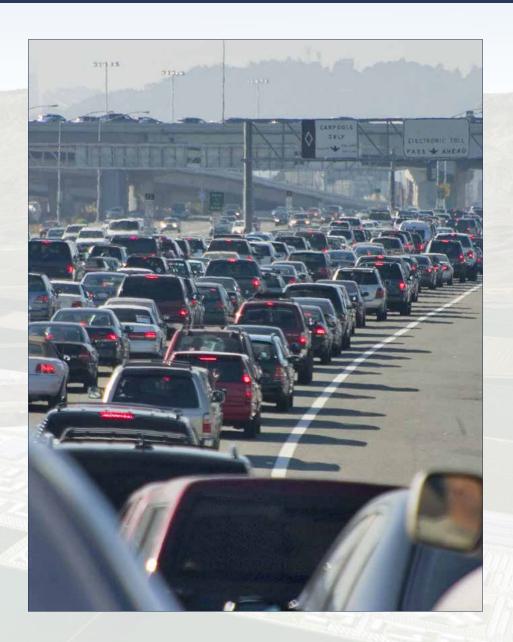
COMMUTER LIFESTYLE

Approximately **43%** of Stanislaus County's employed residents **commute outside of the County,** and **80%** of them **commute to San Francisco Bay Area communities**, a journey that can easily exceed 100 miles round-trip.

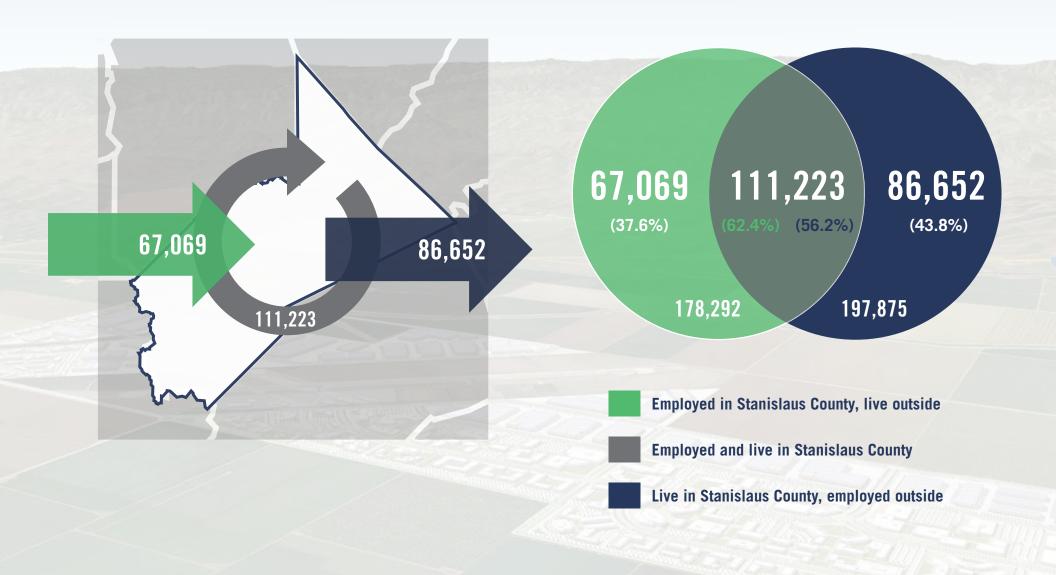
The Commuter Lifestyle is an on-going challenge for our residents as well as those in neighboring counties (San Joaquin and Merced) as documented in a North San Joaquin Valley Regional Assessment conducted by the University of the Pacific.

Stanislaus County currently has an Altamont Commuter Study underway to identify the potential labor force commuting from Stanislaus County and their aptitude for employment at home. The results are expected early 2020.

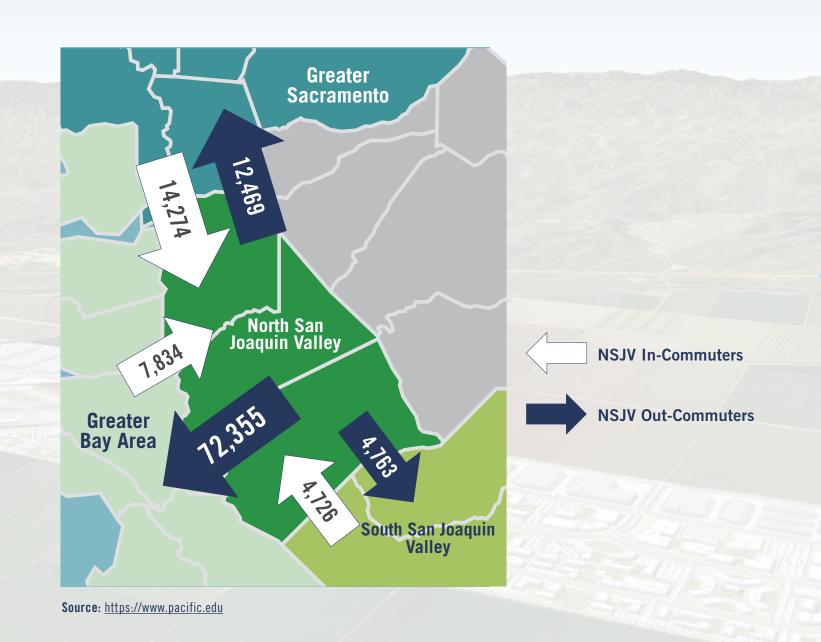
Source: https://www.pacific.edu



INFLOW/OUTFLOW JOB COUNTS



NORTH SAN JOAQUIN VALLEY COMMUTE PATTERNS



VEHICLE MILES TRAVELED PER CAPITA





WORKFORCE CHARACTERISTICS

LARGEST OCCUPATIONS

OCCUPATION JOBS

NATIONAL AVERAGE

Source: Emsi Q3 2019 Data Set www.economicmodeling.com



WORKFORCE DEVELOPMENT

WORK-BASED TRAINING CATEGORIES*

REGISTERED Apprenticeship	ON-THE-JOB TRAINING	CUSTOMIZED TRAINING	INCUMBENT WORKER TRAINING**
Employer-driven "Earn Wh You Learn" Model	ile Employer provided training at the work site	Provided for an employer or a group of employers to new or existing employees	Provided for an employer or a group of employers to existing employees
Combines on the job train with job-related curriculur		Commitment to hire/increase the wage of the trainee after completion	Training is needed to retain a skilled workforce or avert layoffs (can't be used to train new hires)
Wages are provided to the apprentice at the start of apprenticeship		Employer pays for a portion of the training	Training must increase the competitiveness of the employees and the employer
Program must be approve by the State Dept of Apprenticeship Standards	retention is over 12 months	Can be combined with On-the-Job Training as well	Employee or group of employees must have minimum of six months history with employer

^{*} Trainees must be eligible for Workforce Innovation and Opportunity Act (WIOA) funds. Employed trainees must not be categorized as self-sufficient.

Stanislaus County Workforce Development offers a variety of services for both employers and job seekers that shape and strengthen the local and regional workforce to support small, medium, and large business job growth. For additional information visit https://www.stanworkforce.com/

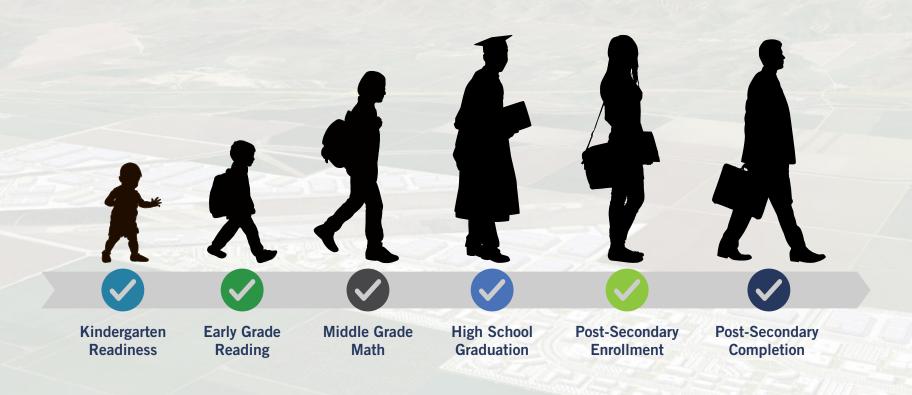


^{**}This is a new training category in WIOA and is in development. WIOA income eligibility may be waived.

PROMOTING FIRST-RATE LEARNING

CRADLE-TO-CAREER

Stanislaus Cradle-to-Career Partnership is working to build a cradle-to-career movement with a path to prosperity for all Stanislaus County children and young people. The vision of the partnership is to create a healthy and thriving community built on educational success and economic well-being for all by aligning sectors and systems in the region to ensure successful outcomes from cradle-to-career. For additional information visit www.stancoe.org/division/administrative-services/cradle-career.



EDUCATION PIPELINE



CSU Stanislaus

Enrolls over **9,700** students and offers **42** undergraduate major programs, **23** master's programs, a doctoral program, seven credential programs and eight certificate programs.



University of the Pacific

Enrolls over **4,900** students (Stockton campus) and offers **80+** undergraduate programs, **30+** graduate and professional programs and a continuing education program.





University of California Merced

Offers **24** majors, **25** minors, and **14** graduate programs. The list will continue to grow as the campus reaches **10,000** students in the coming years.



Modesto Junior College

Enrolls over **18,000** students each semester and offers **85** associate degrees, **58** certificate programs and **19** skill recognition programs.



INDUSTRY CHARACTERISTICS

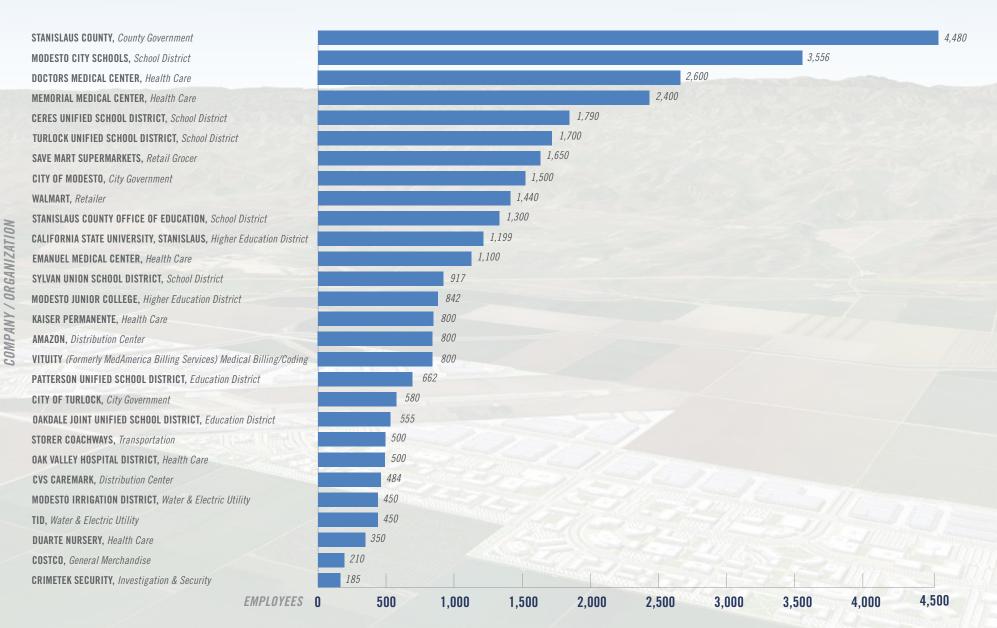
TOP INDUSTRY GRP



TOP EMPLOYERS: MANUFACTURING



TOP EMPLOYERS: NON-MANUFACTURING



Source: Opportunity Stanislaus; Does not include seasonal labor.

BUSINESS EXPANSIONS: LAST 5 YEARS

YEAR	COMPANY	PRODUCT/SERVICE	JOB (+)	CITY
2019	Blue Diamond	Food Processor	28	Turlock
2016	Stanislaus County	New Jail	32+	Modesto
2016	Amazon	Fulfillment Center	850	Patterson
2016	Repsco	Plastic Slip Sheets	15	Riverbank
2016	Valley Milk	Dairy	55	Turlock
2016	E. & J. Gallo Winery	Winery	750	Modesto
2016	Oportun	Information Technology	25	Modesto
2015	Restoration Hardware	Distribution Center	400	Patterson
2015	CalCentral	Manufacturer	38	Modesto SOI
2014	Golden State Inspections	Home Services	4	Oakdale
2014	Donaldson	Manufacturer	5	Riverbank
2014	Hilmar Cheese	Powdered Milk	40	Turlock
2014	Blue Diamond	Almond Producer	200	Turlock



CONTACT US

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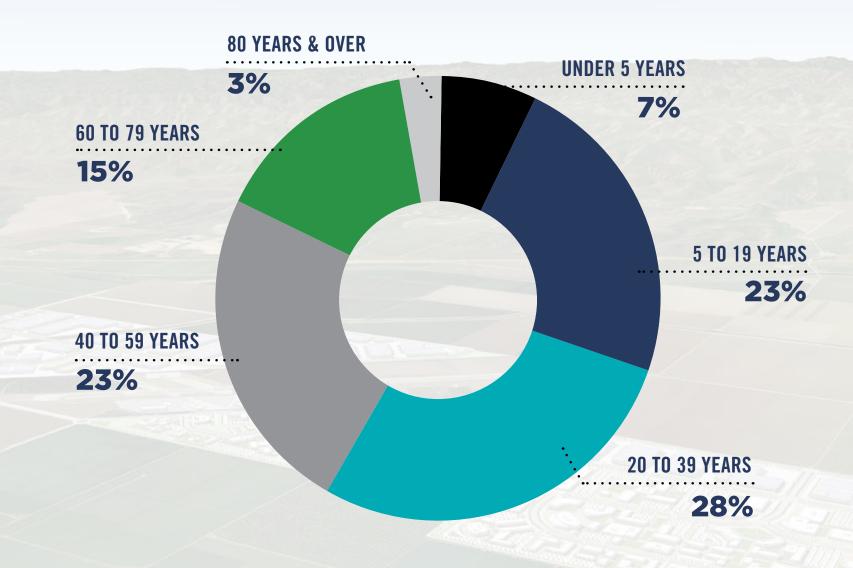
APPENDIX

POPULATION PROJECTIONS



Source: California Department of Finance P-1 Reports as January 2018

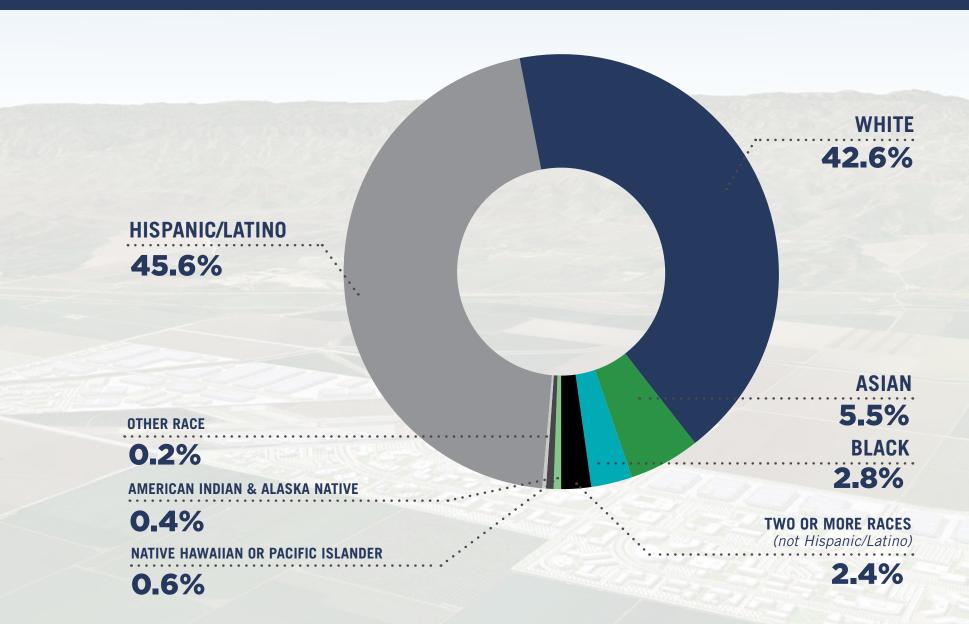
STANISLAUS COUNTY DEMOGRAPHIC | POPULATION BY AGE





STANISLAUS COUNTY DEMOGRAPHIC | ETHNICITY

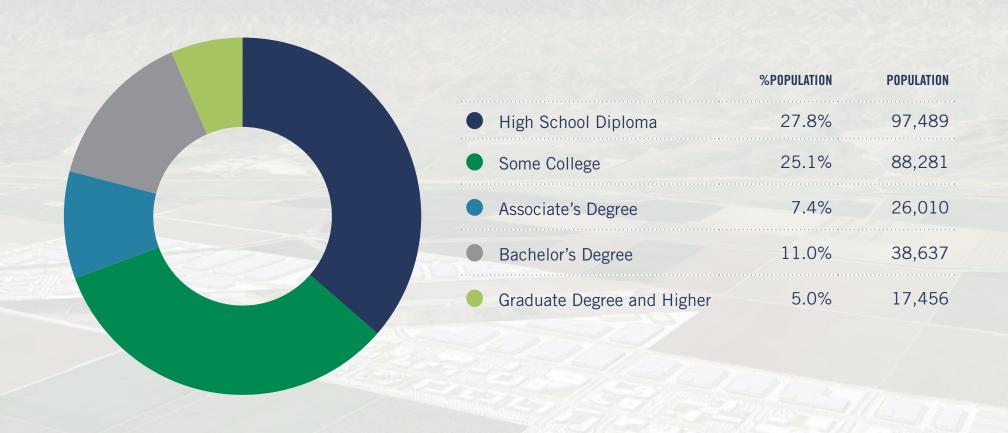




Source: Department of Finance 2012-2016 American Community Survey

EDUCATIONAL ATTAINMENT

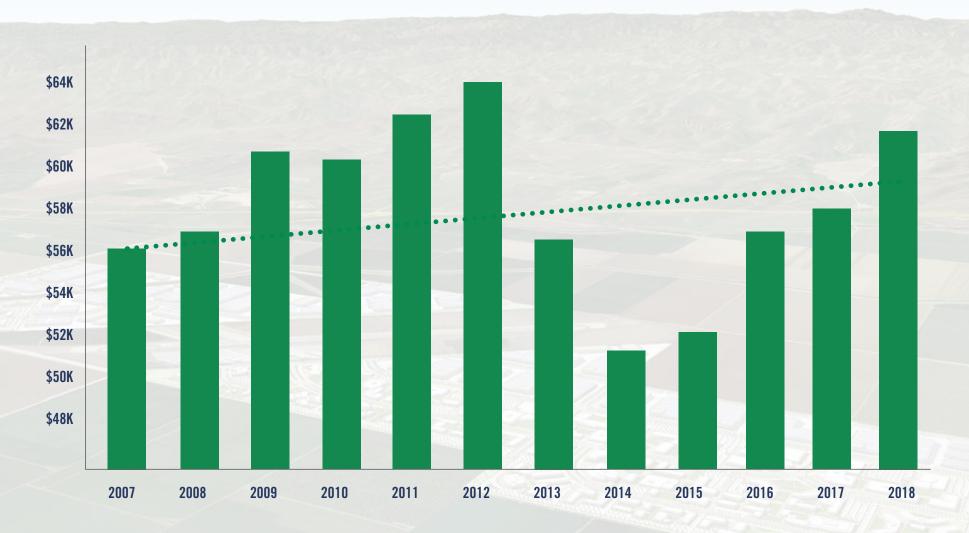
Concerning educational attainment, **11.0% of Stanislaus County, CA residents possess a Bachelor's Degree** (7.6% below the national average), and **7.4% hold an Associate's Degree** (0.6% below the national average).





MEDIAN HOUSEHOLD INCOME

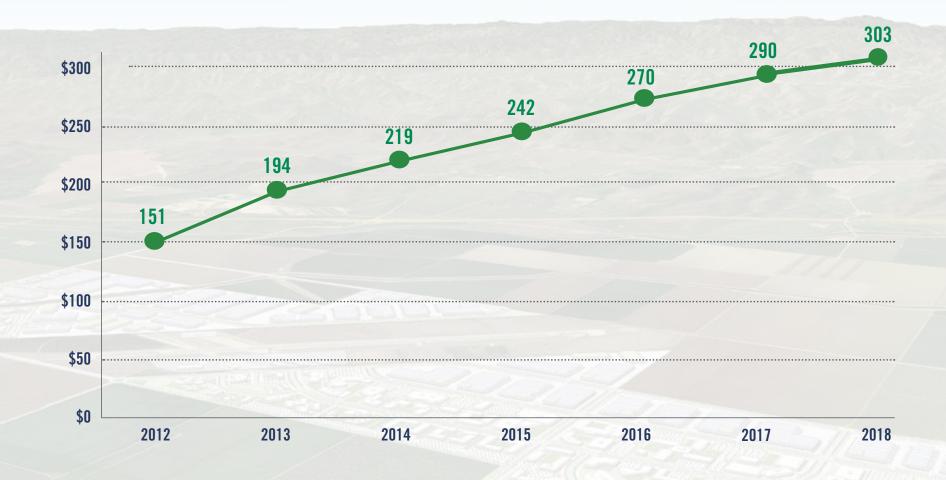
Median Household Income is up **9% from the market low** during the fourth quarter of 2014. However, Median Household Income is 7% lower than the market high in fourth quarter of 2012.



Source: NAHB/Wells Fargo Housing Market Data

STANISLAUS COUNTY MEDIAN HOME PRICES

Median Home Prices are up 128% from the market low during the first quarter of 2012.



HOME AFFORDABILITY

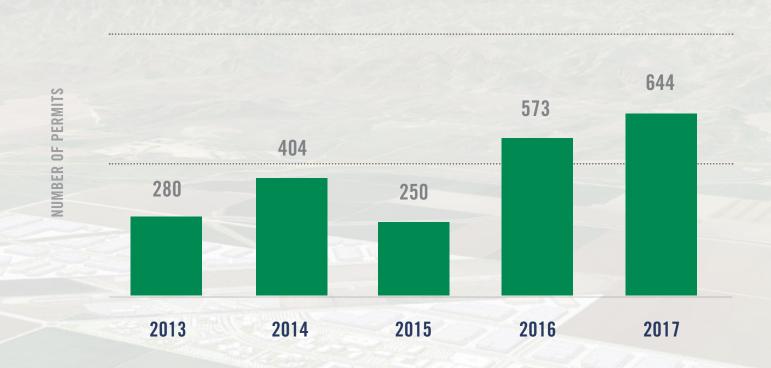
A Ratio of Median Home Prices to Household Income in the 2.2 to 2.6 range has historically been viewed as an indicator of Home Affordability nationally. Prior to the housing bubble the affordability was in the low 2s. The current Affordability Ratio is **higher** than the historical average. As home prices increase and wages remain flat, the ratio will continue to reflect less affordability for Modesto residents.



Source: NAHB/Wells Fargo Housing Opportunity Index

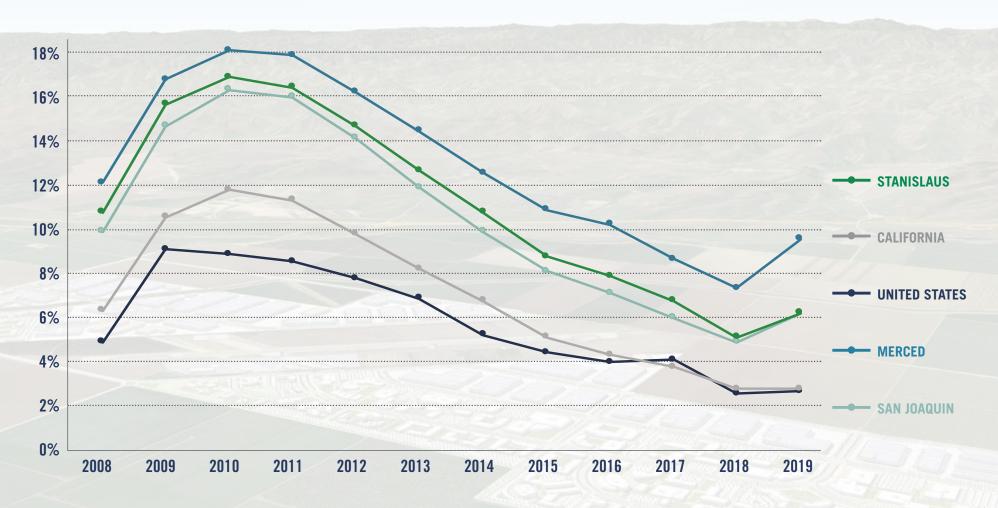
SINGLE-FAMILY BUILDING PERMITS

Stanislaus County tracks issued single-family residential construction permits as a way of monitoring the home construction, building materials and construction employment sector. Issued permits continue to trend upward from **250 in 2015**, to **573 in 2016** and **644 in 2017**.



UNEMPLOYMENT RATE

Unemployment rates in the Central Valley are historically **twice** the national average.



Source: California Employment Development Department





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