

WORKFORCE INVESTMENT BOARD OF TULARE COUNTY

Agri-Business Industry Report 2010

Summary

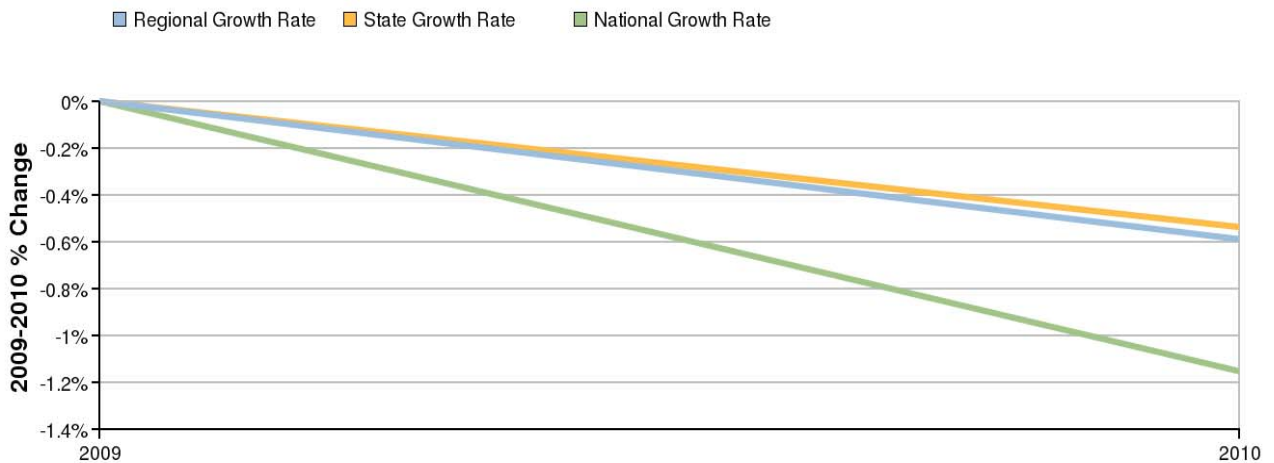
The Agri-Business sector in Tulare County represents all crop production and packing/packaging jobs in Tulare County. Included in the WIB sector work, though not necessarily quantified in this report, are the auxiliary and service jobs related to the ag production.

Basic Information	
2009 Industry Jobs	38,223
2010 Industry Jobs	37,998
Total Change	-225
Total % Change	-0.59%
Current Average Earnings per Worker	\$28,135

Economic Indicators	
2009 Location Quotient	10.47
2010 Location Quotient	10.55
Shift Share: Regional Competitiveness Effect	-362
Shift Share: Industrial Mix Effect	-804
Shift Share: National Effect	941

Source: EMSI Complete Employment - 1st Quarter 2010

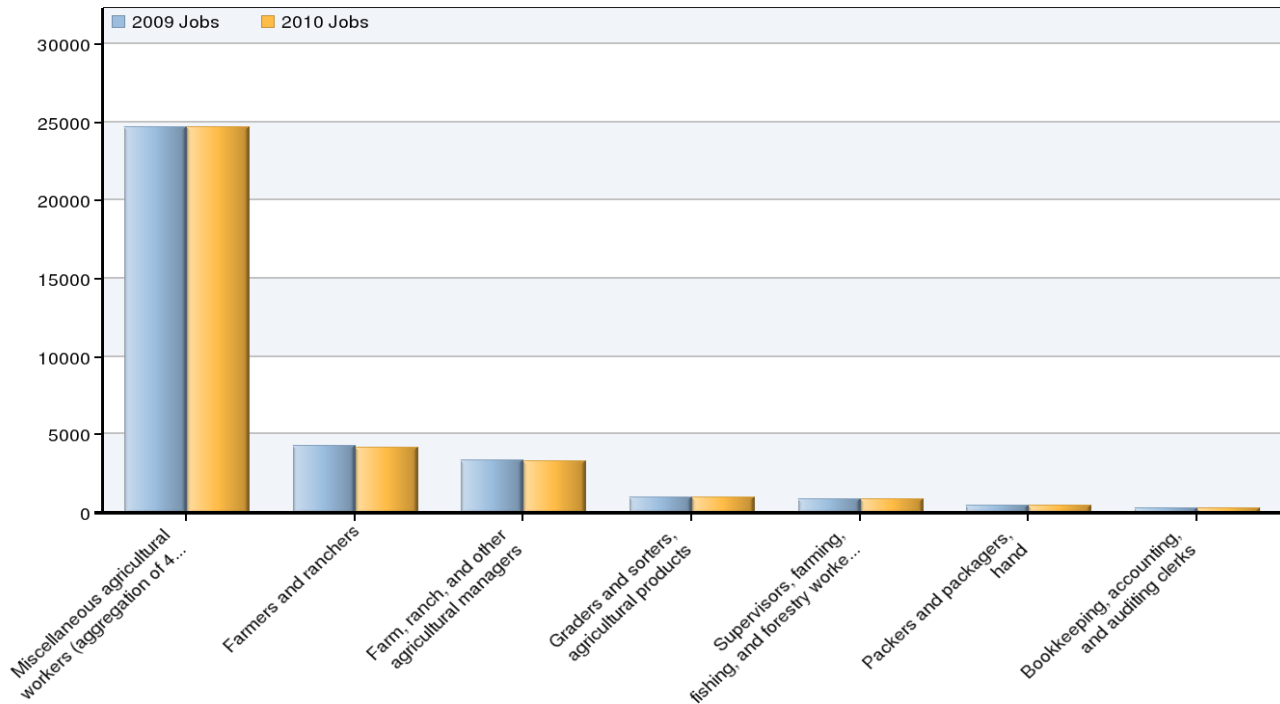
Industry Change Summary



Description	2009 Jobs	2010 Jobs	Change	% Change	Current EPW	2008 Establishments
Regional Total	38,223	37,998	-225	-1%	\$28,135	1,326
State Total	428,937	426,632	-2,305	-1%	\$32,019	18,514
National Total	3,452,937	3,413,122	-39,815	-1%	\$29,390	96,060

Source: EMSI Complete Employment - 1st Quarter 2010

Top Occupations In Selected Industries



SOC Code	Name	2009 Jobs	2010 Jobs	Change	% Change
45-209A	Miscellaneous agricultural workers	24,692	24,682	-10	0%
11-9012	Farmers and ranchers	4,288	4,140	-148	-3%
11-9011	Farm, ranch, and other agricultural managers	3,333	3,295	-38	-1%
45-2041	Graders and sorters, agricultural products	961	964	3	0%
45-1099	Supervisors, farming, fishing, and forestry workers	884	885	1	0%
53-7064	Packers and packagers, hand	439	436	-3	-1%
43-3031	Bookkeeping, accounting, and auditing clerks	313	308	-5	-2%

Source: EMSI Complete Employment - 1st Quarter 2010

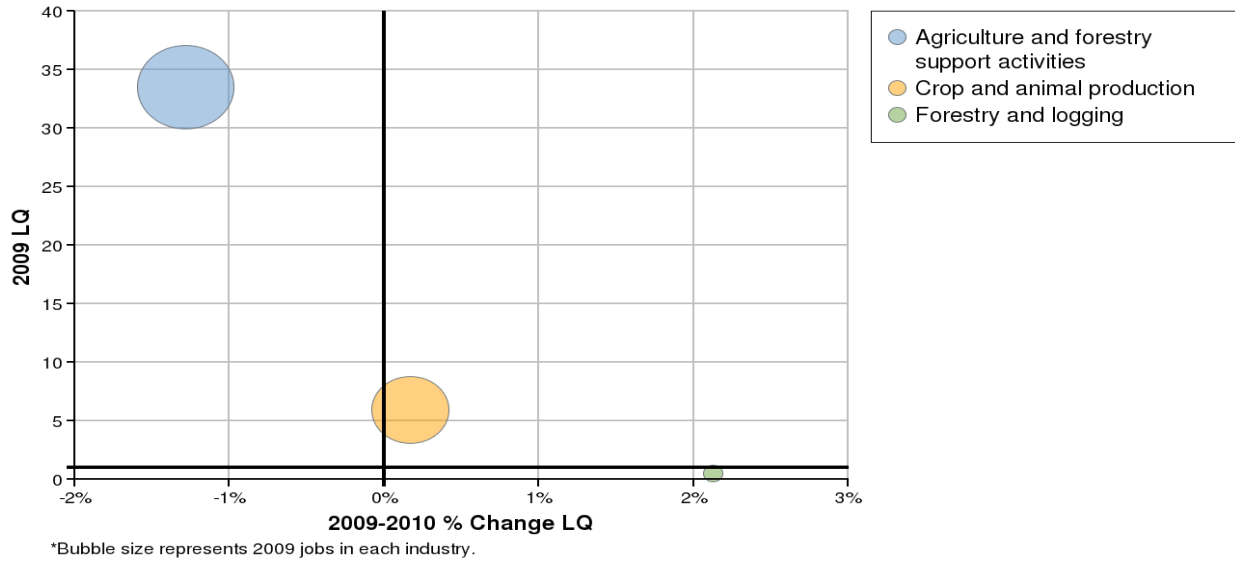
Industry Breakdown



NAICS Code	Description	2009 Jobs	2010 Jobs	Current EPW	2008 Firms
11A	Crop and animal production	16,497	16,173	\$30,304	932
113	Forestry and logging	61	61	\$52,093	5
115	Agriculture and forestry support activities	21,658	21,757	\$26,410	388
	Total	38,216	37,991	\$28,132	1,325

Source: EMSI Complete Employment - 1st Quarter 2010

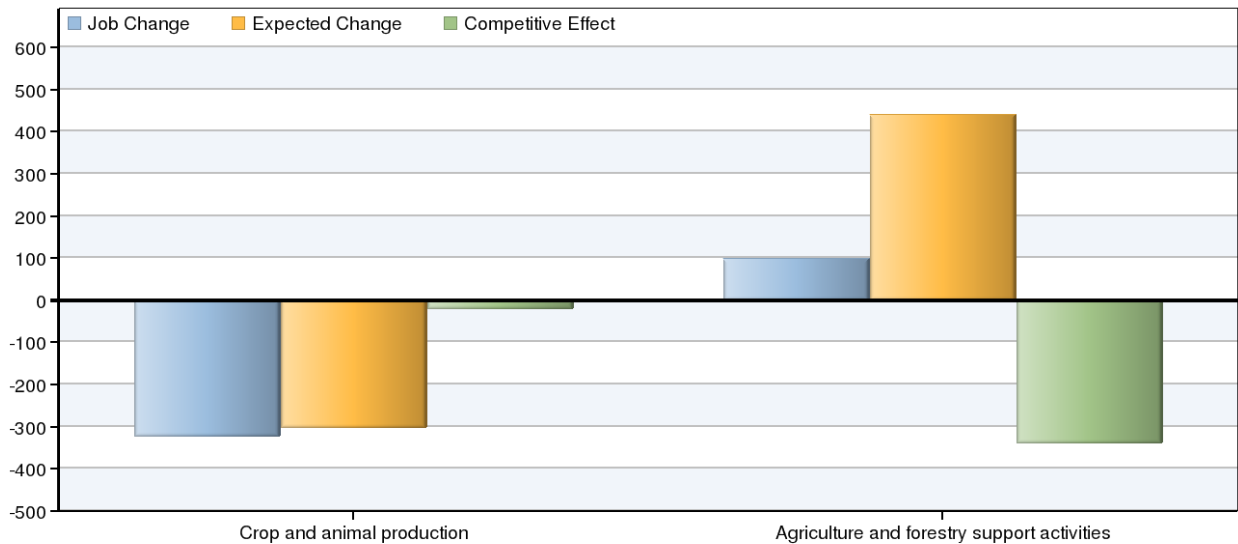
Location Quotient Breakdown



NAICS Code	Description	2009 Jobs	2009 LQ	2010 LQ
115	Agriculture and forestry support activities	21,658	33.52	33.09
11A	Crop and animal production	16,497	5.94	5.95
113	Forestry and logging	61	0.47	0.48
	Total	38,216	10.76	10.84

Source: EMSI Complete Employment - 1st Quarter 2010

Shift Share Breakdown



NAICS Code	Description	Job Change	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect
11A	Crop and animal production	-324	-708	406	-302	-22
115	Agriculture and forestry support activities	99	-94	533	439	-341
	Total	-225	-802	940	138	-363

Source: EMSI Complete Employment - 1st Quarter 2010

Data Sources and Calculations

Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

Location Quotient

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

Shift Share

Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors.

State Data Sources

This report uses state data from the following agencies: California Labor Market Information Department.