



BUILDING PROSPERITY IN THE YUBA-SUTTER REGION

APPENDIX I

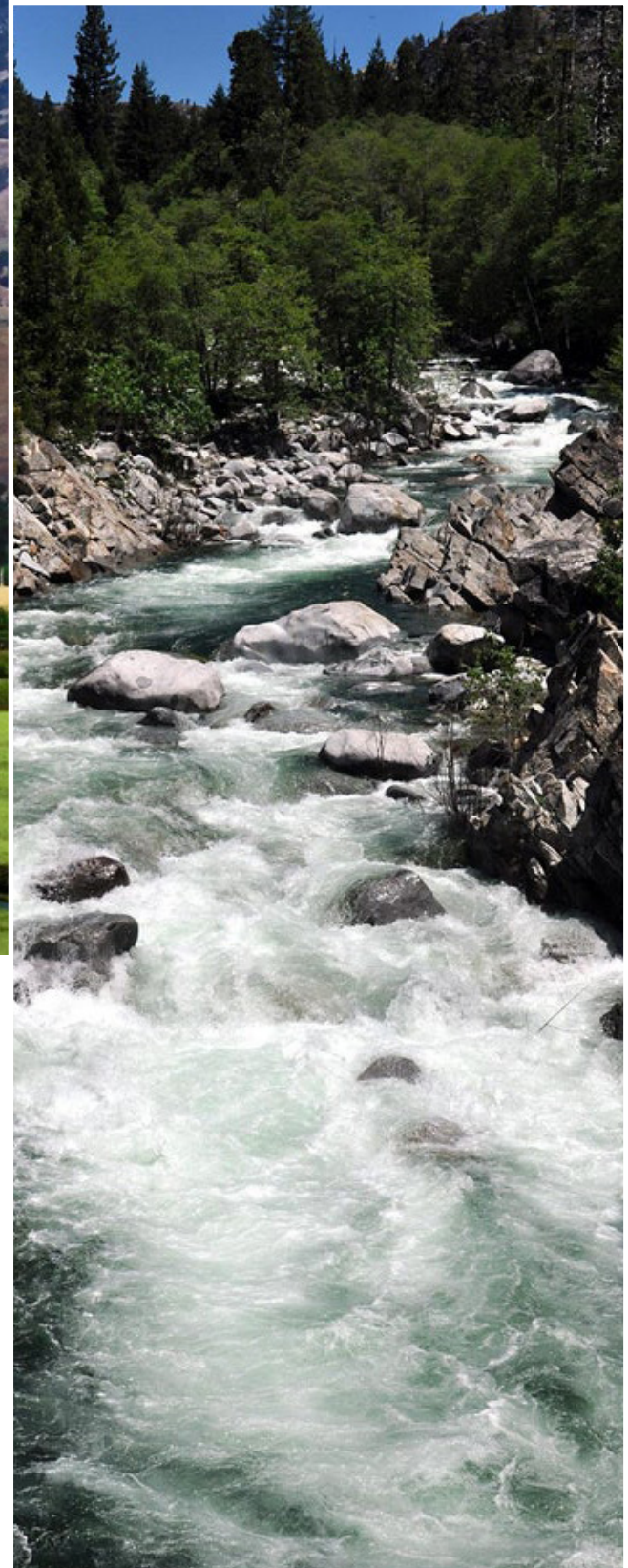
DATA PROFILES 2020-2025

COMPREHENSIVE
ECONOMIC
DEVELOPMENT
STRATEGY

Updated December 31, 2021



YUBA-SUTTER ECONOMIC DEVELOPMENT CORPORATION



ECONOMIC STRENGTH RANKING

In 2020, Yuba City, CA moved to an economic strength ranking of 98 out of 384 MSAs, up 176 places from 2016

Economic strength rankings measure how the economy has behaved, not why. A local economy is defined by where people live and work, earn and spend. The criteria to determine the economic strength are industrial sectors and consistency of growth (rate or stability).

Metropolitan Statistical Areas (MSA) have at least one urbanized area with a population of at least 50,000, plus adjacent territory (counties) which have a high degree of social and economic integration with the core as measured by commuting. The Yuba-Sutter region is identified as Yuba City, CA MSA. There are 384 MSAs in the United States.

Industrial Sectors

Group 1 – Industrial sectors reflect overall growth in size and quality. The quality of the economy is based upon what people earn, as individual earnings influences a person’s “standard of living”.

All Workers- Earnings, Jobs and Wages

Per Capita Total Worker Earnings, Personal Income and Earnings by Residences

Wage & Salaried Workers- Earnings

Wage & Salaried Workers – Jobs and Wage and Salaried Workers Wages

Group 2 – These sectors reflect how the economy is behaving. Small businesses and the construction and retail industries are extremely reactive to the “flow of money” coming into an area. They typically grow or decline in direct proportion to the condition of the economy. There are, of course, exceptions. Areas, which have become destinations for retirement age individuals will have high growth numbers in both construction and retail, while they might not have a strong economy.

Non Farm Proprietors- Earnings, Jobs and Wages

Construction- Worker Earnings, Jobs and Wages

Retail- Worker Earnings, Jobs and Wages

Group 3 – These sectors are negative sectors. Growth in these reflects a poor economy.

Per Capita Income Maintenance (Welfare)

Actual Per Capita Income Maintenance (Welfare)

Per Capita Medical Assistance for the Poor (Medicaid)

Actual Per Capita Medical Assistance for the Poor (Medicaid)

Consistency of Growth

Simply identifying the areas that have the fastest or slowest growth rates is insufficient when trying to determine the character of a local economy. The rate, consistency, or stability of the growth is equally important.

**Yuba City, CA MSA
has improved its
ranking by 176
since 2016.**



ECONOMIC STRENGTH RANKINGS

2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
98	99	121	181	237	274	246	253	227	200

EMPLOYMENT/OCCUPATION OVERVIEW

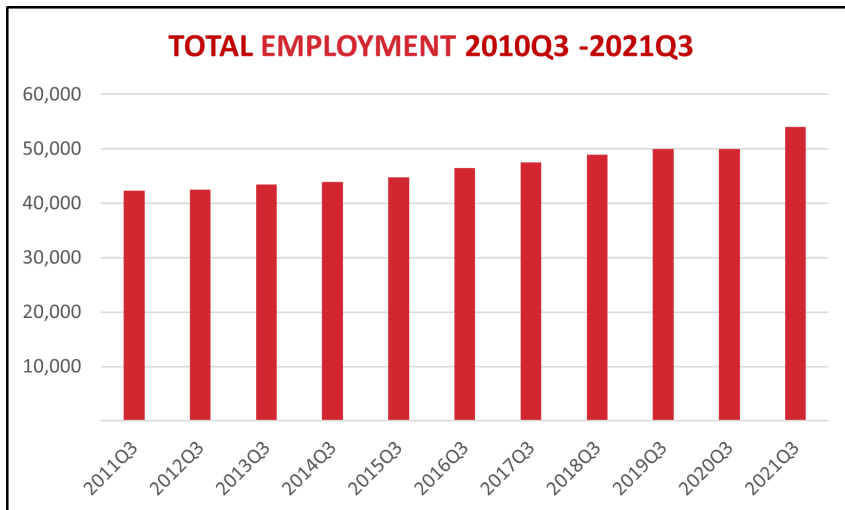
EMPLOYMENT TRENDS

The region has a civilian labor force of 77,200 and as of 2021Q3, total employment for the Yuba City, CA MSA was 54,000 (based on a four-quarter moving average). Over the year ending 2020Q3, employment declined 6.1% in the region.

UNEMPLOYMENT RATE

The unemployment rate for the Yuba City, CA MSA was 6.7 percent as of December, 2021, down from the year-ago estimate of 9.9 percent. This compares with an unadjusted employment rate of 5.0 percent for California and 3.7 percent for the nation during the same period.

The unemployment rate was 7.1 percent in Sutter County, and 6.2 percent in Yuba County.



WAGE TRENDS

The average worker in the Yuba City, CA MSA earned annual wages of \$51,321 as of 2021Q2. Average annual wages per worker increased 7.4 percent in the region over the preceding four quarters. For comparison purposes, annual average wages were \$64,141 in the nation as of 2021Q2.

OCCUPATION SNAPSHOT

The largest major occupation group in the Yuba City, CA MSA is Office and Administrative Support Occupations, employing 5,564 workers. The next-largest occupation groups in the region are Transportation and Material Moving Occupations (5,202 workers) and Sales and Related Occupations (4,891). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 10.09), Community and Social Service Occupations (1.30), and Educational Instruction and Library Occupations (1.27).

Occupation groups in the Yuba City, CA MSA with the highest average wages per worker are Healthcare Practitioners and Technical Occupations (\$104,800), Management Occupations (\$99,000), and Architecture and Engineering Occupations (\$97,400). The unemployment rate in the region varied among the major groups from 2.0% among Legal Occupations to 18.2% among Food Preparation and Serving Related Occupations.

Over the next year, the fastest growing occupation group in the Yuba City, CA MSA is expected to be Healthcare Support Occupations with a +3.1% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Healthcare Support Occupations (+91 jobs) and Food Preparation and Serving Related Occupations (+53). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (758 jobs) and Sales and Related Occupations (713).

2018-2028 FASTEST GROWING OCCUPATIONS



Maids / Housekeeping Cleaners
148.4%



Heavy and Tractor-Trailer Truck Drivers
62.8%



Personal Care Aides
37.4%



Maintenance and Repair Workers
28.6%



Medical Assistants
23.5%



Cooks, Restaurants
23.3%



Light Truck or Delivery Service
22.9%



Landscaping and Groundkeeping
20.5%

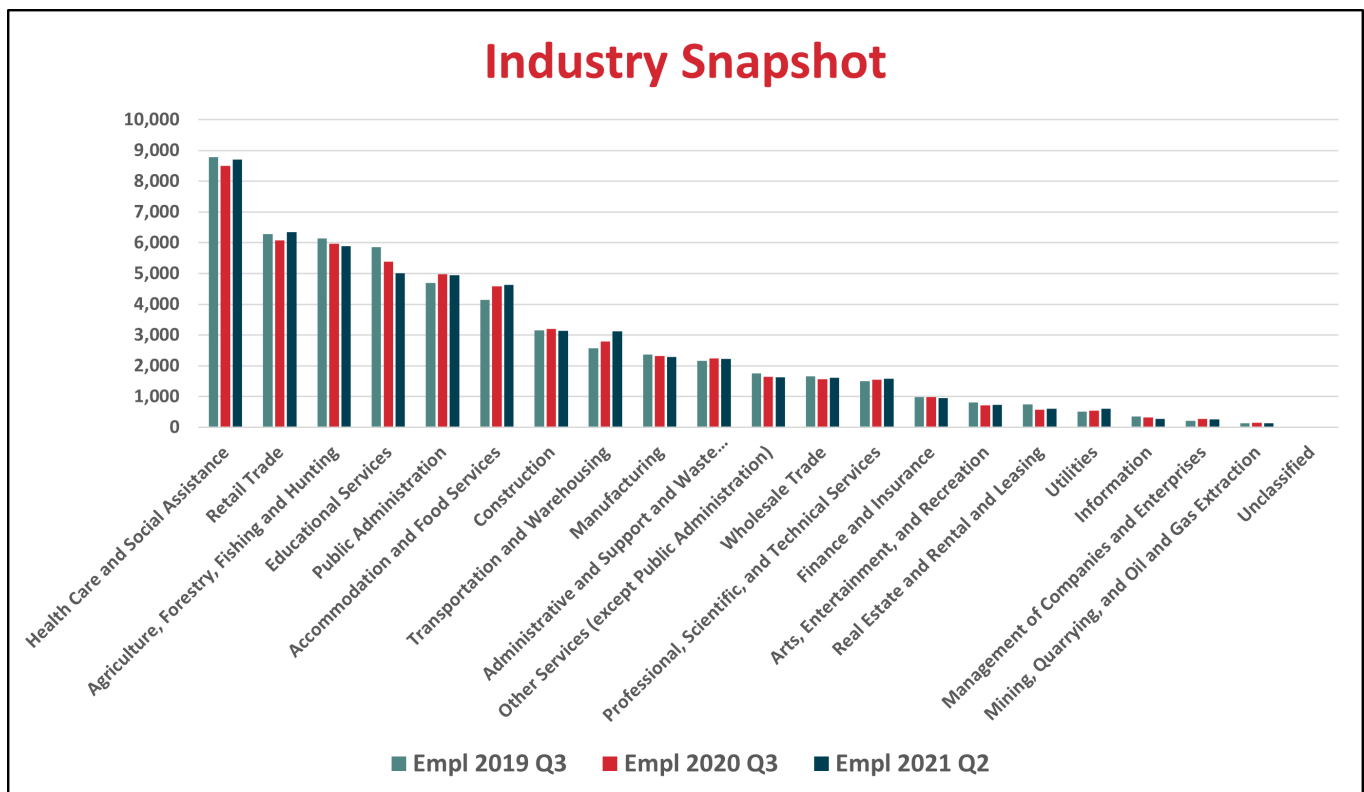
INDUSTRY SNAPSHOT



The largest major occupation group in the Yuba City, CA MSA is Health Care and Social Assistance, employing 8,705 workers. The next-largest occupation groups in the region are Retail Trade (6,348 workers) and Agriculture, Forestry, Fishing and Hunting (5,996 workers). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 7.65), Utilities (1.34), and Public Administration (1.72).

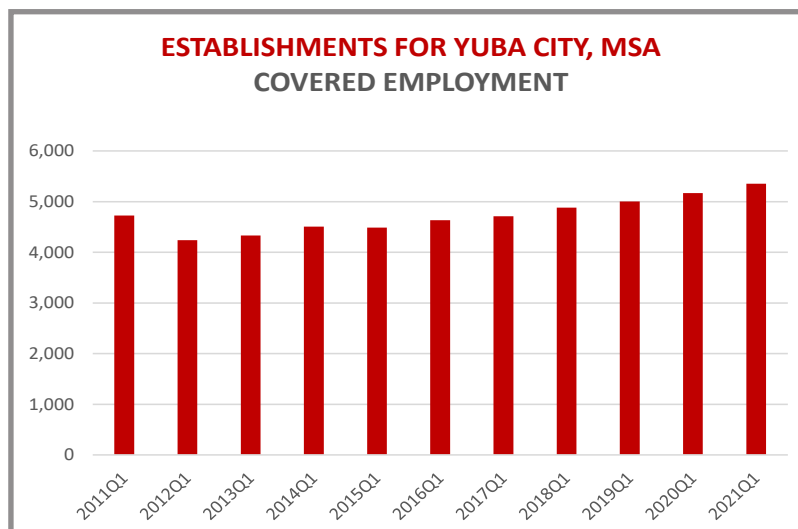
Sectors in the Yuba City, CA MSA with the highest average wages per worker are Mining, Quarrying, and Oil and Gas Extraction (\$96,280), Management of Companies and Enterprises (\$92,464), and Utilities (\$76,926). Regional sectors with the best job growth (or most moderate job losses over the last five years are Health Care and Social Assistance (+1,167 jobs), Transportation and Warehousing (+1,138), and Accommodation and Food Service (+1,108).

Over the next year, employment in the Yuba City MSA is projected to expand by 486 jobs. The fastest growing sector is expected to be Healthcare Support Occupations with a +2.2% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Healthcare and Social Assistance (+189 jobs) and Accommodation and Food Services (+65), and Agriculture, Forestry, Fishing and Hunting (+52).



BUSINESS ESTABLISHMENTS

The Yuba-Sutter region's number of covered employment establishments (Businesses whose employees are covered by unemployment insurance benefits) grew 13.56 percent over the past 10 years from 4,724 to 5,355. There was a substantial dip in the growth in 2012 as a direct result of the 2009 recession which came a bit slower to the area. However the region recuperated steadily in the following years and continues to grow.



TOP 10 EMPLOYERS - SUTTER COUNTY (2021)

Company Name	No. of Employees*	Industry Type
Yuba City Unified School District	1,358	Education
Sutter County	959	Government
Rush Personnel	661	Employment Services
Legend Transportation, Inc	650	Transportation
Sunsweet Grower's Inc.	600	Food Processing
Sutter North Yuba City	475	Healthcare
Sysco Sacramento, Inc.	460	Food Distribution
Walmart - Yuba City	400	Retail
Express Employment Professionals	375	Employment Services
City of Yuba City	300	Government

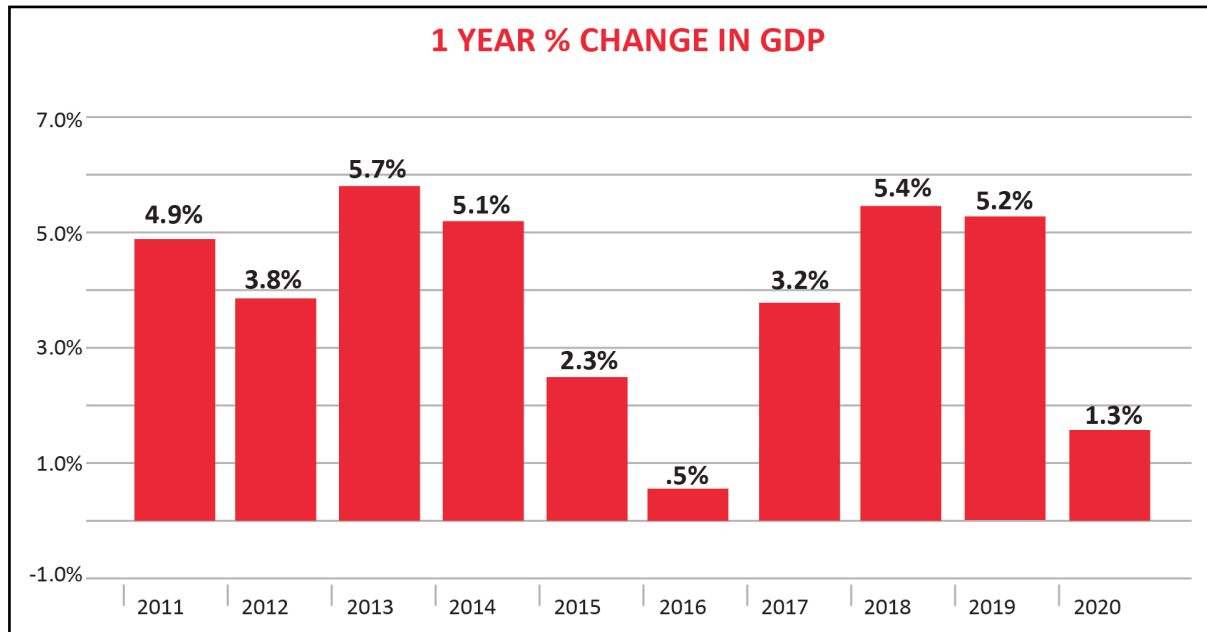
TOP 10 EMPLOYERS - YUBA COUNTY (2021)

Company Name	No. of Employees*	Industry Type
Beale Air Force Base - Military & Civilian	6,316	Military
Adventist Health + Rideout	2,109	Health Care
Marysville Joint Unified School District	1,225	Education
Hard Rock Hotel & Casino	1,135	Hospitality
Yuba County	851	Government, Local
Caltrans DOT Transportation Dept.	720	Government, State
Yuba College (Marysville Campus)	708	Education
Bishops Pumpkin Farm	450	Agriculture
Walmart - Marysville	405	Retail - General
Frank M. Booth	340	Construction

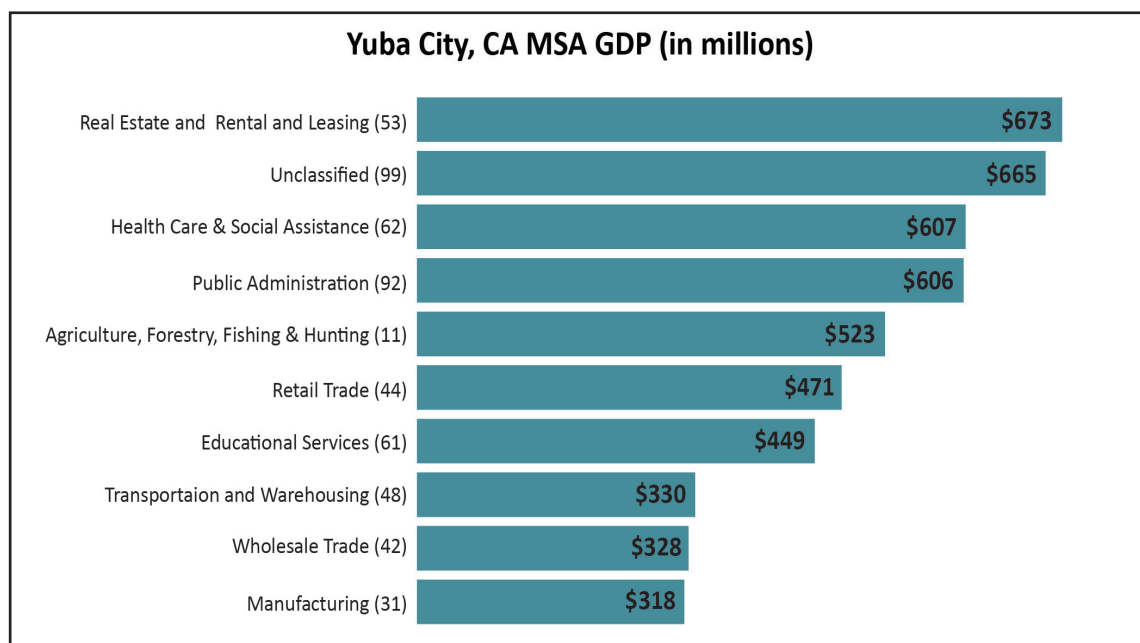
* Number of employees includes part-time and seasonal worker

GROSS DOMESTIC PRODUCT

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2020, nominal GDP in the Yuba City, CA MSA expanded 1.3%. This follows growth of 5.2% in 2019. As of 2020, total GDP in the Yuba City, CA MSA was \$6,364,444,000



Of the sectors in the Yuba City, CA MSA, Real Estate and Rental and Leasing contributed the largest portion of GDP in 2020, \$672,952,000. The next-largest contributions came from Unclassified (\$664,974,000); Health Care and Social Assistance (\$606,903,000); and Public Administration (\$605,639,000).



POPULATION, AGE & HOUSEHOLDS

According to the California Department of Finance, Sutter County's preliminary estimated population for July 2021 was 101,478 an increase of 0.76 percent over July 2020 data. About 69.8 percent or 70,776 Sutter County residents reside in Yuba City, the county seat and largest city. The population of Yuba City declined by -0.18 percent from the previous year. Yuba City serves as the center for shopping and business for Sutter and Yuba counties as well as parts of Butte and Colusa counties. Sutter County's total population is projected to reach 101,757 residents by the year 2025, an increase of 7 percent over Census 2010 figures. The county's population is projected to increase to 120,143 (26.6 percent) by 2060.

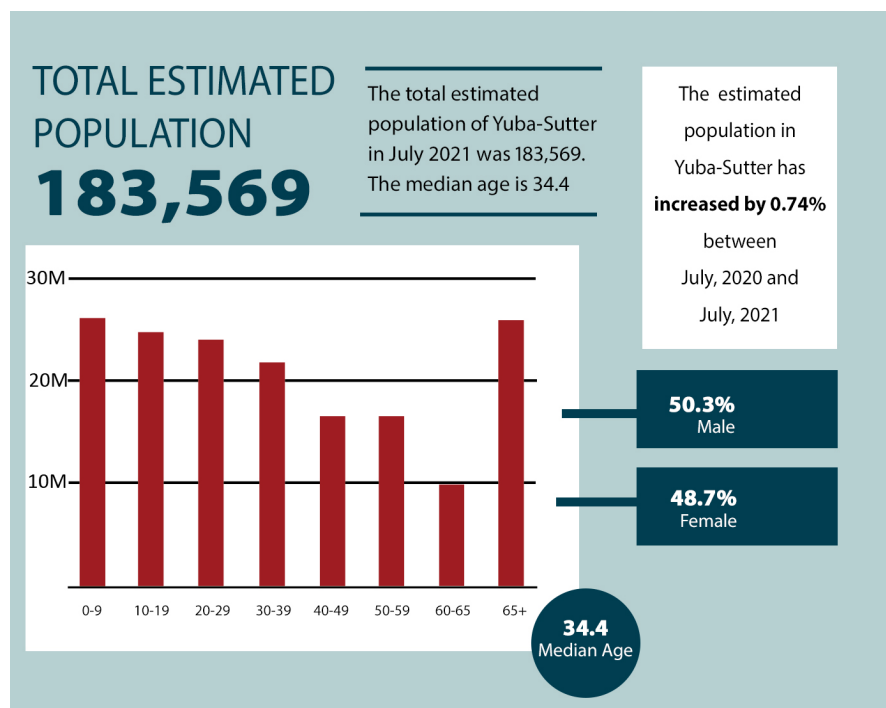
Yuba County's preliminary estimated population for July 2021 was 79,407, an increase over 2020 data of 1.1 percent. The largest city within the county, Marysville, is the

county seat and one of California's most historic cities. Its history as a community dates to California's Gold Rush era. Much of Yuba-Sutter's agricultural, recreational, educational and industrial activities are located within Yuba County. Of the Yuba County population, more than 80 percent reside in the unincorporated areas. The population in Yuba County is projected to reach 78,123 by the year 2025, an increase of 10 percent above the 2010 census. Yuba County's population is projected to increase to 88,592 (22.5 percent) by 2060.

As the area's population is expected to increase 15 percent over the next 30 years, the cities and counties are working to manage this growth by improving infrastructure elements such as roads, water, wastewater, and levee systems. Special attention to major transportation arteries will be especially critical.

Households

According to the U.S. Census Bureau, the average number of persons per household is 2.89 and 70.6 percent are family households and 49.4 percent are married couples. The 2015-2019 American Community Survey estimates that there are 62,981 housing units in the region with 1.4 percent homeowner vacancy and 3.3 percent rental vacancy. There are 21 percent more households who own their homes than there are renters.



INCOME AND SPENDING

Households in Yuba and Sutter Counties earn a median annual income of \$58,605 and 38.29 percent of the households earn more than the national households average each year. Household expenditures average \$58,406 per year.

\$58,605
Median Household Income

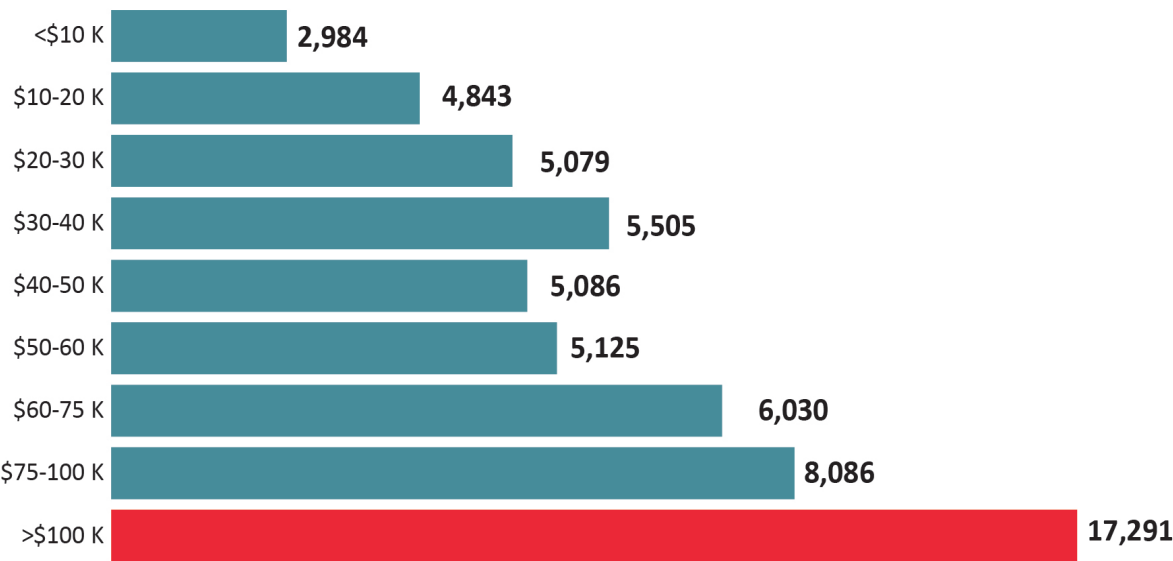
20%

less than the state

6%

less than the nation

Income Distribution



The majority of earnings get spent on shelter, transportation, food and beverages, health care, and utilities. Consumer expenditures increased 5.45 percent over the previous year and reflect the increase in the cost of living. For comparison purposes the cost of living increase for the nation was 5.21 percent and 5.5 percent for the state of California.

Shelter

\$13,459

Transportation

\$11,698

Food and Beverages

\$9,456

Health Care

\$5,400

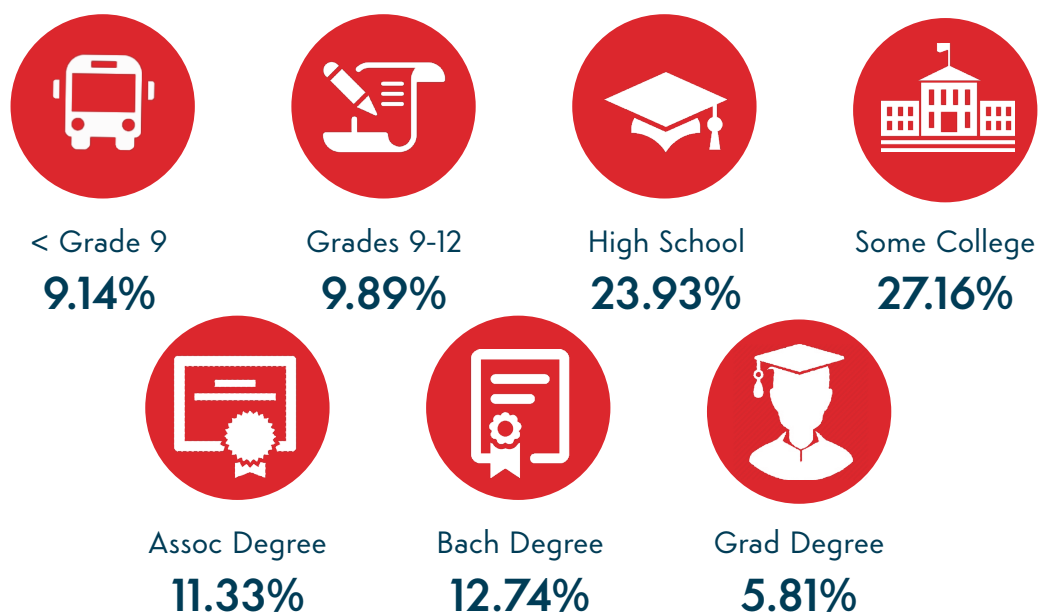
Utilities

\$4,754

EDUCATIONAL ATTAINMENT

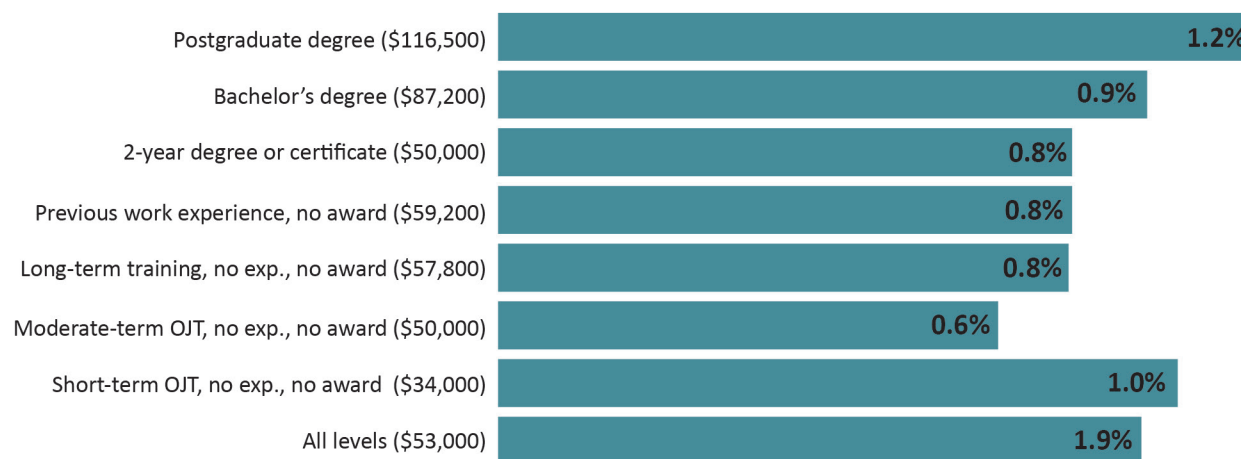
School enrollment for the population, ages three years and older in Yuba City MSA, includes nursery and preschool, kindergarten, elementary, high school, college and graduate school. In 2013-2017 U.S. Census Bureau American Community Survey five-year estimates there was 48,297 or 26.31 percent of the region's population in school.

29.88 percent of the population in Yuba and Sutter Counties have an Associate's Degree or higher. This attainment increased 2.61 percent over the previous year. 57.04% have completed some college or higher.



Expected growth rates for occupations vary by the education and training required. While all employment in the Yuba City MSA is projected to grow 0.9% per year, occupations typically requiring a postgraduate degree are expected to grow 1.2% per year, those requiring a bachelor's degree are forecast to grow 0.9% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 0.8% per year.

Annual Average Projected Job Growth by Training Required for Yuba City, CA MSA



Employment by occupation data are estimates as of 2021Q2. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

POVERTY

Poverty thresholds (U.S. Census Bureau) represent a federal government estimate of the point below which a household of a given size has pre-tax cash income insufficient to meet minimal food and other basic needs. The poverty rate for the Yuba-Sutter region typically has been higher than both national and state levels. American Community Survey 2015-2019 poverty estimates, the percentage of Yuba-Sutter's families for which poverty status is determined to be 15.5 percent compared to the state's percentage of 13.4 percent and USA's level of 13.4 percent. The overall poverty rate for the region is trending down after peaking in 2015 (19.85 percent).

