



Preliminary Draft

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)



Submitted by:

County of Imperial, California

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Contents

1. Introduction	1
2. Executive Summary.....	4
3. State and Regional Economic Conditions	8
4. Local (County and City-Level) Economic Conditions	19
5. Industry Cluster Analysis	46
6. Strategic Direction / Action Plan.....	69
7. Evaluation Framework	79
8. Candidate CEDS Projects	88
9. Qualifying Census Tracts	89
Appendix A – Census Data.....	91
Appendix B – Demographic and Economic Data for Imperial County and Cities	94
Appendix C – Descriptions of Traded & Local Clusters (from U.S. Cluster Mapping Project)	135
Appendix D – Maps of Study Geographic Areas for Industry Cluster Analysis	142
Appendix E – Cluster Employee Database by Region	143
Appendix F – NAICS Component Industries by Cluster	156
Appendix G – Correspondence Between Cluster Mapping Project and Cluster Definitions in Southern Border Coalition, Regional Plan	181

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1. Introduction

This document provides a five-year Comprehensive Economic Development Strategy (CEDS) for Imperial County, California. It is organized as a countywide CEDS covering the County of Imperial and participating constituent jurisdictions. As described later in the CEDS, each of the local jurisdictions (i.e., cities) has unique niches in the Imperial County economy and different areas of strategic focus for economic development. The CEDS is not intended to replace their individual economic development programs. It is instead designed to strengthen city-level initiatives while providing a framework for enhanced collaboration between the County and local entities on development issues of regional significance.

For unincorporated areas – where the County supplies both countywide government services and the municipal functions typically provided by cities, the CEDS creates a framework for delivery of community-level economic development in tandem with County-led regional initiatives. This “dual” function within unincorporated areas is especially important to ensure adequate allocation of services and resources to smaller, rural communities with unique economic development challenges.

Key Themes Addressed in this CEDS

The CEDS Action Plan is designed to leverage Imperial County’s existing and emerging economic strengths, while systematically addressing current and longstanding challenges to the region’s prosperity. During the course of the CEDS planning process, the following key themes emerged as significant drivers of the strategic vision outlined in the CEDS:

- Maximizing “next level” opportunities related to the region’s longstanding mainstay industry (agriculture);
- Expanding the region’s leadership in the renewable energy cluster, including existing/emerging opportunities in geothermal and biofuels production;
- Supporting aggressive implementation of the new Lithium Valley initiative, which seeks to maximize supply chain development around anticipated lithium extraction in Imperial County (potentially generating new manufacturing and R&D activities in the County);
- Connecting the presence of military/defense installations in the Imperial County (and adjacent Yuma County, Arizona) to potential R&D and manufacturing investment in targeted industries such as aerospace;
- Capitalizing on Imperial County’s established status as a destination for both domestic and bi-national visitation and recreation; and
- Leveraging Imperial County’s strategic location within the California – Baja California (“CaliBaja”) border region, which supports tremendous opportunities for international trade, “onshoring” of manufacturing, and border-related tourism.

Economic Resilience and the CEDS

This CEDS strongly aligns with the Economic Development Administration’s focus on building resiliency in local and regional economies. In addition to including a specific series of action items under the program objective labeled “Foster Sustainability and Economic Resiliency,”¹ the overall CEDS reflects a complete spectrum of strategic themes that relate directly to the concept of economic resiliency. These themes include:

- Diversification of the region’s industry/employment base (including growing opportunities for international trade and foreign direct investment);
- Focus on strengthening existing and emerging industry clusters;
- Focus on retention/expansion of existing businesses;
- Creating a business environment conducive to entrepreneurial and small business development;
- Infrastructure investments that leverage local, state and federal funding;
- Integration of economic development programming with broader planning, land use and environmental initiatives; and
- Improving the fiscal wherewithal of local governments.

Evaluation Framework

The CEDS Action Plan includes a set of performance measures that will be utilized to evaluate implementation of the CEDS and its impact on the regional economy. The chosen performance measures focus on metrics that can be readily tracked over time (and compared across different geographies and jurisdictions). The focus on commonly available data sources (including the Census Bureau, Bureau of Labor Statistics, and various State sources) is intended to facilitate the preparation of Annual Performance Reports in future years.

¹ See Major Theme C (“Sustaining Existing Economy”), Goal 1 in the Action Plan (Chapter 6 of the CEDS).

CEDS Committee

Preparation of this CEDS was guided by the following Strategy Committee:

Name (Title)	Affiliation
Tyler Salcido (City Manager)	City of Brawley
Camilo Garcia (Mayor) Juan Contreras (Acting City Manager)	City of Calexico
Laura Gutierrez (Administrative Services Director)	City of Calipatria
Adriana Nava (Community Services Director) Cedric Cesena (City Manager)	City of El Centro
Nick Wells (City Manager)	City of Holtville
Dennis H. Morita (City Manager) Jenell Guerrero (Assistant to the City Manager)	City of Imperial
Miguel Figueroa (County Executive Officer) Rosa Lopez (Budget and Program Administrator)	County of Imperial
David Aguirre Katie Luna	Imperial County Transportation Commission
Stephanie Martinez Enrique Nunez	County of Imperial Department of Social Services
Efrain Silva (Dean, Economic and Workforce Development Division)	Imperial Valley College
Victor Torres (Associate Dean, Economic and Workforce Development Division)	Imperial Valley College
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John McMillan (Assistant Vice President of Economic Development)	San Diego State University
Tim Kelly (President) Sean Wilcock (Vice President) Oscar Cruz	Imperial Valley Economic Development Corporation
Alex Perrone	Real Estate Professional
Mark Gran	BHE Energy
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Yvonne Bell (President/CEO) Sara Sanders (Vice President)	Innerecare
Jim Turner (President) Elena Lopez Paola Garcia Lauren Rose	Controlled Thermal Resources
Rudy Rodriguez (President)	Imperial Printers

2. Executive Summary

SWOT Summary

During the course of the CEDS planning process, the following Strengths, Weaknesses, Opportunities and Threats relative to Imperial County's economic potentials have been identified:

STRENGTHS

- Abundant and competitively priced natural resources (land, water and energy) create substantial capacity for new development
- Relatively affordable housing (can be attractive to households relocating from much more expensive coastal counties)
- County has strong position in renewable energy production, which can be attractive to numerous other industries
- Recently improved border crossings
- Improvements at Brawley airport and completion of the SR-111/SR-78 "Brawley Bypass" have opened new areas for potential business development.
- Imperial is a Self-Help County, also having passed Measure D for supplemental transportation infrastructure funding
- Small town "feel" and related quality-of-life attributes

WEAKNESSES

- Low educational attainment levels among resident workforce (creates a barrier to attraction of technology-oriented industries)
- Low labor force participation rates and high unemployment rates; seasonal employment
- Language barriers as impediments to public and private sector endeavors reaching their full potential
- Shortfall of financial resources needed for a county like Imperial; for example, public transportation services are limited relative to the County's large geographic area
- City/County regulations and permitting processes are cumbersome and can be an impediment to development and new business attraction
- No "ecosystem" in place for entrepreneurial startups; there is currently a lack of coordinated "messaging" about entrepreneurial development opportunities and resources in the County; no existing incubator/accelerator facilities
- No local (4-year) degree program in engineering/STEM fields (SDSU is currently developing a program at the Imperial Valley campus, but it is not operational yet)

OPPORTUNITIES

- Local workforce board has multiple partners for job training, etc., including resources in San Diego; potential to implement a "career pathway" programs around emerging growth industries; potential to expand focus on trades within the local workforce development system

- High volumes of shipments from Mexico into the US through Imperial County and great opportunities for additional capture of this activity
- High levels of retail spending by Mexican nationals could potentially be increased through development of additional retail outlets in the County
- The CaliBaja Bi-National Mega-Region (San Diego and Imperial counties, with Baja California) is a geographic/marketing concept that also can claim to be a “North American manufacturing powerhouse” in certain industries²
- A number of active transportation-improvement projects will increase cross-border and other operational efficiency in the County, including the Calexico East POE Bridge Expansion, the Calexico Intermodal Transportation Center (ITC), Forrester Road Improvements from I-8 to SR78/86 (near El Centro), and SR-86 Border Patrol Checkpoint Expansion
- Aggressive implementation of the “Lithium Valley” initiative, potentially including a campus for incubation of R&D and manufacturing activities connected to the lithium supply chain; forthcoming completion of the Program Environmental Impact Report (PEIR) for the lithium cluster can create significant competitive advantages for attracting lithium-related investment

THREATS

- State-level regulatory policies that are business un-friendly and beyond the direct control of local decisionmakers
- Shortfall of medical specialists
- Drug and human trafficking problem
- Reduction in size and degradation of the Salton Sea embodies certain health threats, for example from toxic chemical residues, as does pollution in the New River
- Vulnerability of trade and other industries to border-related policies in both Mexico and the US, including potential for pandemic-related slowdowns, value of the Mexican peso, etc.

Action Plan Summary

In this CEDS, strategies are organized under the following four major themes:

Major Theme A. Public sector operational capacity and readiness

Major Theme B. Infrastructure

Major Theme C. Sustaining existing economy

Major Theme D. Supporting emerging economic opportunities

Within each theme is a series of Goals, shown below, each accompanied by a set of Action Items (not shown here):

Major Theme A. Public sector operational capacity and readiness

² Knauss School of Business, San Diego State University; the Ahlers Center for International Business. *The Calibaja Regional Economy – Production, Employment, Trade & Investment*. 2022 (assumed, document is undated).

Goal 1

Establish leadership role for County across multiple strategic objectives: quality of life, collaboration with regional partners, economic development, environmental issues, improved customer service, etc.

Goal 2

Address multiple aspects of public sector operational capacity and readiness, including fiscal soundness, critical transportation services, institutionalized economic development, crime, etc.

Goal 3

Recognizing that suitable housing is a key component of successful economic development in Imperial County, continue to support local efforts to implement the Housing Element policies aimed at ensuring an adequate supply of workforce, or middle income, housing

Goal 4

Adopt a comprehensive approach to supporting and coordinating multiple programs that enhance the region's quality of life

Major Theme B. Infrastructure

Goal 1

Improve regional mobility

Goal 2

Prioritize efforts, and improve and provide services to industrial and commercial sites

Goal 3

Support long-range transportation plan strategies involving mitigation of bottlenecks, truck safety, etc.

Goal 4

Continue to support programs related to the Southern Border Broadband Consortium

Major Theme C. Sustaining existing economy

Goal 1

Integrate all CEDS programs to promote economic resiliency in Imperial County

Goal 2

Strengthen Imperial County's economy by promoting a balanced, yet diversified, regional economic base

Goal 3

Promote/support agricultural production and diversification

Goal 4

Promote and expand tourism in Imperial County, to see that visitors' needs are accommodated, and recognizing tourism's ties to residents' quality-of-life and to other industries such as agriculture

Goal 5

Sustain and promote expansion of international/ bi-national trade

Major Theme D. Supporting emerging economic opportunities

Goal 1

Promote Lithium Valley concept – combining geothermal projects and lithium mining

Goal 2

Support appropriate and efficient promotional and development efforts related to The CaliBaja Bi-National Mega-Region, as a concept and emerging reality

Goal 3

Establish and maintain close coordination between training programs accessible to the Imperial County workforce, and the County's emerging/expanding industries

The CEDS strategies and action items are intended to address a comprehensive range of challenges and opportunities, and are based on: 1) input from stakeholders, and 2) on prior strategic and informational documents, prepared by the County and others, which identified issues that are still relevant today. A key overriding point of view in the Action Plan is the sense that the County's relative isolation is not just geographic but also economic, and also social and socio-economic – consequently the challenges as well as opportunities have a local (countywide) focus by nature. An interesting upside to this situation is that the County can be understood to be a source of focus for change.

The Goals and Action Items are mutually reinforcing in many cases, and respond to the industry targeting analysis, SWOT assessment, and many conditions underlying the data reported in this CEDS – all of which are core principles of CEDS strategic planning.

3. State and Regional Economic Conditions

This chapter provides an overview of published research and statistical data that characterize existing statewide and regional economic conditions relevant to Imperial County. Given Imperial’s strategic location within the dynamic California/Arizona border region, the following geographic areas are considered in this summary:

- California (as a whole)
- Southern California
- The California Border Region (San Deigo and Imperial Counties)

Where appropriate, observations and data specific to Imperial County are provided for purposes of comparisons to the larger reference areas. Chapter 4 provides more detailed data for Imperial County and its constituent cities.

The statewide and regional economic overviews are based on information extracted (in most cases, verbatim) from the following key documents:

1. California Economic Forecast published by the Los Angeles County Economic Development Corporation, Institute for Applied Economics (February 2024);
2. The CaliBaja Regional Economy – Production, Employment, Trade & Investment published by The Ahlers Center for International Business, Knauss School of Business, University of San Diego (2022); and
3. Seizing CaliBaja’s Nearshoring Opportunity: A Binational Call for Action published by Institute of the Americas (April 2024).

CALIFORNIA ECONOMIC FORECAST FOR 2024 (LAEDC)

In 2023, California experienced slower economic growth compared to the national average, and projections suggest a further slowdown in GSP growth. While job creation in 2023 was notable, especially in sectors such as health, education, hospitality, and professional & business services, the growth rate is expected to decrease in the upcoming years. Certain industries, including manufacturing, are anticipated to see job declines. Despite the State’s unemployment rate having previously returned to pre-pandemic levels, it is now on the rise again.

The State budget is struggling with substantial deficits, primarily attributed to economic slowdown and the volatility and uncertainty of tax revenues, emphasizing the need for budget balancing strategies and proposed solutions. Moreover, California continues to face the challenge of population decline. Factors such as housing affordability, high cost of living, and substantial tax burdens contribute to the exodus of residents. While there has been a slight improvement in the downward trend in the past year, the declining population across most of the populated counties in the state poses economic challenges, emphasizing the need to address key issues such as housing affordability to maintain California as a place of opportunity.

On the other hand, with the Federal Reserve keeping interest rates unchanged recently and signaling potential cuts throughout 2024, there is potential for stimulating the real estate market and fostering economic growth in the other sectors of the State.

Major Economic Indicators

Gross State Product (GSP)

In 2023, economic growth in California was an estimated 1.9 percent, notably lower than the national rate of 2.4 percent. GSP growth is anticipated to slow to about 1.7 percent in 2024 and 1.6 percent in 2025. These projected rates are expected to align more closely with the national growth projection in 2024 and slightly surpass the national average in 2025.

Employment

Nonfarm employment added 372,000 wage and salary jobs in 2023, reaching 18 million jobs, a 2.1 percent increase over 2022. During 2023, nearly all major industry sectors in California experienced job growth, with the most significant gains in the private sector in private education & health (155,300 jobs), leisure & hospitality (119,100 jobs), and professional & business services (25,100 jobs). The public sector also contributed to the increase, adding 47,600 jobs. The information sector, however, witnessed substantial job declines, losing 20,300 payroll jobs, a 3.3 percent drop from 2022, likely attributed to the dual Hollywood strikes and the recent layoffs and hiring slowdown in the tech industry. According to companies' comprehensive list of layoff notifications to the San Francisco Office of Economic and Workforce Development, San Francisco alone experienced 10,200 permanent job terminations in 2023. Among these, prominent companies such as Salesforce, Gap, and Google were responsible for the largest reductions in San Francisco, each cutting over 600 employees in 2023.

In the coming years, California's job creation rate is expected to slow, with a projected annual growth rate of 1.2 percent in 2024 and a further decrease to 0.7 percent in 2025. This translates to an addition of 211,600 new jobs in 2024 and 123,100 jobs in 2025. The sectors anticipated to contribute the highest job growth over the next two years include private education & health (adding 126,300 new jobs), leisure & hospitality (69,100 new jobs), and professional & business services (55,800 new jobs). The information sector is projected to shift to positive job growth in the next two years, adding approximately 17,000 new jobs over this period. Conversely, after three years of job growth, the manufacturing sector is projected to undergo job declines, resulting in a total loss of 22,400 jobs in 2024 and 2025, dropping below pre-pandemic levels. Additionally, a slight increase of 3,100 jobs is projected for the transportation, trade, and utilities sector in 2024, followed by a decline of 10,000 jobs in 2025, though the overall employment in this sector will still be about 3.2 percent higher compared to pre-pandemic levels.

Personal Income

The growth in personal income for California residents lags significantly behind the national rate, experiencing only a 0.2 percent increase in 2023 compared to the national average growth rate of 5.2 percent. This gap can be largely attributed to the loss of high-wage jobs in the information and tech industry. Projections indicate a higher personal income growth rate of 1.9 percent in 2024 and 3.0 percent in 2025. Nevertheless, these growth rates remain considerably lower than the projected annual growth rate of over 5 percent for the entire U.S.

Unemployment Rate

In 2022, California's unemployment rate returned to pre-pandemic levels. However, entering 2023, the State's unemployment rate, starting at 4.2 percent, rose to 5.1 percent in December, marking a one percentage point increase compared for the December 2022 to December 2023 period.

Variations in the unemployment rates across counties were notable, with San Mateo County having the lowest rate at 3.2 percent, while Imperial County recorded the highest at 18.3 percent. Other counties that had relatively lower unemployment rates include San Francisco County (3.5 percent), San Luis Obispo County (3.6 percent), Marin County (3.7 percent), Sonoma County (3.8 percent), Orange County (3.8 percent), and Santa Clara County (3.9 percent). Over the year, all 58 counties saw an increase in the unemployment rate, with Imperial County experiencing the largest rise at 3.1 percentage points and Los Angeles County the smallest at 0.6 percentage points.

Broken out by racial and ethnic groups, the unemployment rates in December were 6.4 percent for those identifying as Black, 5.1 percent for Hispanic, 4.0 percent for those reporting as Asian, and 4.6 percent for those identifying as White. Over the year, there was a 0.7 percentage point increase in the unemployment rate for Asians and Hispanics, a 0.3 percentage point increase for those reporting as White, and a 1.0 percentage point decrease for those identifying as Black. While those identifying as Black have the highest unemployment rate among racial and ethnic groups, the disparity between them and the other groups has lessened over the years.

Over the next two years, the annual unemployment rate is projected to rise from 4.6 percent in 2023 to 5.0 percent in 2024 and 5.1 percent in 2025. Despite this increase, the unemployment rate remains comparable to pre-pandemic levels and has significantly improved from its peak of 16.1 percent in April 2020 following the onset of the COVID-19 pandemic.

State of California Budget Issues

Volatility of Tax Revenues

California has been experiencing budget turbulence over the past year, shifting from a historic surplus of nearly \$100 billion to a substantial deficit within one year. According to the 2024-25 Governor's proposed budget released on January 10, 2024, California now faces a \$37.9 billion deficit, while the Legislative Analyst's Office (LAO) suggests an even higher deficit of \$58 billion. One of the major reasons for the State's fiscal challenges can be attributed to its heavy reliance on personal income taxes, particularly those linked to the volatile stock market. Over the years, California's major revenue sources have shifted from retail sales to personal income taxes, with the latter now being the largest contributor, accounting for over 55 percent of total General Fund revenues. California's tax structure represents one of the country's most progressive income tax systems. In 2021, close to 50 percent of personal income taxes originated from the top one percent of income earners, highlighting the concentrated tax liability within a small demographic segment.

In recent fiscal years, California experienced unprecedented revenue strength due to capital gains realizations, reaching a record high of \$349 billion, or 11.6 percent of personal income, in 2021. However, this also exposes the state tax revenue to the inherent volatility of the stock market. The downturns in the stock market during 2022, marked by a 19 percent decline in the S&P 500 and a 33 percent drop in the NASDAQ Composite indices, signified the most significant annual declines in these key indices since the onset of the 2008 Great Recession. As a result, the 2023 Budget Act forecast

anticipated a \$240 billion capital gains realization in 2022, or 7.9 percent of personal income, representing a 30 percent decline from the record highs of 2021. However, cash data indicates an even more substantial drop of 57 percent, leading to a projection of around \$200 billion lower capital gains realizations through 2025 compared to the 2021 hike. This will turn the share of capital gains realizations of personal income back to 5 percent, roughly the historical average level since 2000.

Governor’s Plan to Address Budget Deficit

Although the actual size is up for debate, it is clear that California is currently facing substantial budget deficit for the upcoming fiscal year. Governor Newsom put the estimate at \$37.9 billion, while the LAO suggested a potential deficit as high as \$58 billion. The disparity arises from the interpretation of baseline changes, particularly a \$15 billion reduction in K-12 education and community college spending, which the LAO considers a policy choice rather than a baseline change. To address this, the Governor’s budget- balancing strategies include withdrawing \$12.2 billion from mandatory and discretionary Budget Stabilization Account balance and the entire Safety Net Reserve balance of \$0.9 billion. The spending-related solutions, totaling \$26 billion (excluding schools and community colleges), involve 1) reductions of \$8 billion, including cuts to state departments’ operation budget and reductions to various programs and services, including education, housing, and climate; 2) delays, amounting to \$8 billion, to future years, including investment in transit, preschool/TK/K education, and clean energy, which potentially strain future budgets; 3) fund shifts from alternative funds, such as special funds, totaling \$6 billion, to offset General Fund costs; and 4) reversions of about \$3 billion in unspent funds to the General Fund, including expediting some reversions that would have occurred in later years. In addition, cost shifts of about \$4 billion are proposed, including deferring state employee payroll of \$1.6 billion and redirecting a supplemental pension payment of \$1.3 billion.

CALIFORNIA HEADLINE ECONOMIC STATISTICS AND FORECAST

	2019	2020	2021	2022	2023	2024f	2025f
Real GSP Growth	3.2%	-2.3%	7.8%	0.4%	1.9%	1.7%	1.6%
Real Personal Income Growth	4.0%	7.5%	3.6%	-5.5%	0.2%	1.9%	3.0%
Nonfarm Employment (000s)	17,432.4	16,185.5	16,748.0	17,693.6	18,065.5	18,277.1	18,400.2
Unemployment Rate	4.1%	10.1%	7.3%	4.2%	4.6%	5.0%	5.1%
CPI Change	3.0%	1.7%	4.3%	7.4%	4.0%	2.9%	2.2%

Source: LAEDC Institute for Applied Economics (February 2024).

THE CALIBAJA REGIONAL ECONOMY – PRODUCTION, EMPLOYMENT, TRADE & INVESTMENT (2022)

Highlights of Study Findings

CaliBaja is the largest integrated economic zone along the U.S.-Mexico border. CaliBaja is home to 7 million residents and has a regional GDP of \$250 billion and an estimated \$70 billion in cross border trade flows. The CaliBaja region comprises the two southernmost counties in California (San Diego and Imperial County) and the six Mexican of Baja California (Ensenada, Mexicali, Rosarito, San Quintin, Tecate, and Tijuana).

The study uses a Location Quotient (LQ) methodology to identify high performing industries in the CaliBaja region. This study focused on CaliBaja industries with “High LQs” of 1.5 or above, in which employment is substantially (at least 50%) above the average for the United States and Mexico in a given industry. Such industries are more likely to produce for external markets, thereby bringing outside revenue, creating jobs, spurring investment and consumption, and—in the context of COVID—enabling firms to better manage market fluctuations.

CaliBaja is a “High LQ” region, especially for certain manufacturing industries. In the CaliBaja region, there were 33,027 firms employing 657,598 individuals in 70 different industries that met the 1.5 LQ threshold in 2018. Combined, these industries contributed \$38.6 billion in overall value-add to the regional economy. Among the most important “High LQ” industries were the 27 industries (38%) found in the manufacturing sector, which together accounted for 389,128 workers and generated \$21.6 billion in value-added in 2018.

CaliBaja’s audio and video equipment manufacturing has been declining, with 2,000 jobs lost and a \$600 million drop in value added between 2008 and 2018. In 2008, the industry had an LQ of 28.8 with 50 firms employing 31,609 workers in CaliBaja; however, the industry fell to an LQ of 24.1 with 40 firms and 28,721 workers in 2018. Over that same period, the value added for this sector declined by over \$600 million.

Medical device manufacturing has been on the upswing. In 2018, the industry had a regional LQ of 10.1 (up from a regional LQ of 7.6 in 2008), a total of 353 firms (up from 297 in 2008), and a total of 74,331 employees in CaliBaja (up from 43,015 in 2008). There were 53,941 employed in this sector in Tijuana, 9,906 in San Diego, and 6,765 in Mexicali.

The strength of the CaliBaja economy has made it attractive to outside investors. Baja California attracts over a billion dollars a year in foreign direct investment (FDI), with the majority of that investment in manufacturing. Venture capital flowing into San Diego has increased sharply in recent years and topped \$2 billion in each quarter from (2020Q4 to 2021Q2), mainly in the life sciences (biotechnology, pharmaceuticals, and genomics).

CaliBaja’s educational institutions are preparing the region’s STEM workforce. A total of 30,932 higher education degrees were conferred in San Diego County and 18,800 were conferred in Baja California in 2018, with 32% and 38% awarded in the STEM fields, respectively.

A large share of the region’s workforce crosses the border every day. An estimated 54,000 people cross the border from Baja California to work each day, including an estimated 2,627 working in the

health sector as doctors, dentists, nurses, paramedics, caregivers, and other health-related occupations. On the other hand, more than 4,700 cross-border workers live in San Diego and Imperial counties and work in Mexico.

\$200 million in goods crosses the CaliBaja border each day: \$70 billion each year. In 2019, a total of \$44.1 billion was imported from Mexico via truck at the land ports in California and a total of \$25.8 billion was exported to Mexico. On average, that is almost \$200 million in goods moving between California and Mexico each day. Trade dropped by over \$6 billion in 2020 due to COVID, but bounced back by mid-year.

The region's manufacturing strengths helped CaliBaja weather the COVID pandemic. While COVID struck certain industries hard—with severe job losses in Arts, Entertainment, and Recreations (-51.7%) and Accommodation and Food Services (-51.4)—job losses were much lower in Manufacturing (-7%), Information (-8.4%), Professional, Scientific, and Technical Services (-5.9%).

Improved infrastructure is needed to create jobs and promote investment for both countries.

Continued infrastructure investments—including the construction of the Otay Mesa East port of entry for trucks and commercial vehicles—are urgently needed to enable the CaliBaja region to contribute to the growth of U.S.-Mexico production and trade in the coming decades.

Investments in STEM education and research aids industries on both sides of the border by enhancing productivity and innovation. One potential problem (and opportunity) involves the so-called “STEM divide” where the quality of STEM education is much higher in more affluent communities as compared to lower income areas. Policies and programs should work to ensure quality STEM educational opportunities to underserved communities on both sides of the border.

Government, business, and civic leaders need to make evidence-based decisions to develop sound policies and initiatives. Continued research and analysis of the workings of the CaliBaja regional economy must be a top priority for state and local government agencies, business entities, and civic organizations in the cross-border region. While many in the region work actively to promote cross-border collaboration, there is often a tendency to focus only on what happens on one side of the border or the other.

Conclusions and Policy Implications

Reskilling for Industry 4.0: The CaliBaja region stands out in industries that involve high-end manufacturing, such as audiovisual equipment and medical device manufacturing. Supporting such industries requires a workforce that is prepared for innovation and production.

Investments in STEM education and research aid industries on both sides of the border by enhancing productivity and innovation. San Diego's growing knowledge economy will require a steady inflow of talent as it expands and attracts more investment. On the Mexican side, manufacturing processes are becoming increasingly sophisticated and will require workers with higher levels of education than in the past.

The region's colleges and universities have so far met the challenge but more needs to be done. One potential problem (and opportunity) involves the so-called “STEM divide” where the quality of STEM education is much higher in more affluent communities as compared to lower income areas.

Policies and programs should work to ensure quality STEM educational opportunities to underserved communities on both sides of the border. Secondary and higher education institutions should also strive to build educational connections across the border, through exchanges, competitions, and other interactions that will encourage knowledge sharing and community building.

Improving Cross-Border infrastructure: Border infrastructure promotes jobs and investment for both countries. The already significant interactions between the two regions could be made more efficient and costs could be reduced with investments that improve the flow of people, products, and information across the border.

The completion of critical transportation linkages in Otay Mesa—linking south-bound State Route 125 (SR 125) to the eastbound State Route 905 (SR 905) and State Route 11 (SR 11) connectors—in December 2021 took over one billion dollars, more than two decades, and intense collaboration between the U.S. and Mexican governments at the federal, state, and local level.

Continued infrastructure investments of this nature—including the construction of the Otay Mesa East port of entry for trucks and commercial vehicles—are urgently needed to enable the CaliBaja region to contribute to the growth of U.S.-Mexico production and trade in the coming decades.

More and Better Data: Government, business, and civic leaders need to make evidence-based decisions to develop sound policies and initiatives. Unfortunately, answers to many of the most interesting questions about the CaliBaja region – like who crosses the border and why, and what are the specific linkages between cross-border firms – are elusive because they often require data that does not exist, is not readily obtained, or is not easily interpreted.

Continued research and analysis of the workings of the CaliBaja regional economy must be a top priority for state and local government agencies, business entities, and civic organizations in the cross-border region. While many in the region work actively to promote cross-border collaboration, there is often a tendency to focus only on what happens on one side of the border or the other. Thus, there is a need for more initiatives – within and across different organizations – to inform CaliBaja’s government, business, and civic leaders about the state of the binational regional economy and help generate ideas to promote CaliBaja’s continued growth and prosperity.

SEIZING CALIBAJA'S NEARSHORING OPPORTUNITY: A BINATIONAL CALL TO ACTION (APRIL 2024)

Study Summary

Supply chain disruptions caused by Covid-19, a complicated geopolitical landscape, and rising labor, logistical and transportation costs have prompted a growing number of companies once largely reliant on Chinese manufacturing to re-shore their production back to the United States or explore nearshoring options. Newly enacted industrial policies to promote national security objectives and strong, resilient supply chains – including Executive Order 14017 on America's Supply Chain, the Inflation Reduction Act, the U.S. Chips & Science Act, and the National Forum to Secure America's Supply Chain for Essential Medicine – have accelerated this generational shift of companies considering alternative nearshoring options.

Mexico is among the preferred nearshoring options for companies focused on the North American market due to its proximity to the United States, signatory status to the USMCA (United States-Mexico-Canada Agreement) trade pact, and established supply chains with the United States and Canada. That said, Mexico competes with other friend-shoring options (including Malaysia, Indonesia, Thailand, Vietnam) where corporate supply chains are being redistributed based not only on cost and geographic proximity, but a variety of other factors including proximity to Asian markets, security, logistical reliability, speed to market, regulatory considerations, rule of law, political stability, and government incentives.

Mexico's challenge involves not just its ability to maintain established supply chains but to attract and create the conditions for inbound investment to foster greater North American supply chain resiliency. Depending on how effectively Mexico responds to concerns identified by prospective nearshoring companies, the country could expect up to a 33% growth in annual manufacturing exports to the United States, from \$455 billion today to an estimated \$609 billion within the next five years.

Among locations in North America, the CaliBaja Binational Mega-Region (CaliBaja)—defined as the binational region comprising the two southernmost California counties (San Diego and Imperial) and Baja California— is uniquely positioned to take advantage of this historic re-shoring/nearshoring opportunity for critical high- value added supply chains, including medical devices, semiconductors, aerospace, and lithium battery/zero emission vehicle manufacturing. Under the right conditions, the region also has an opportunity to become a destination for future generic drug and biosimilar manufacturing.

Whether Mexico, and more specifically the CaliBaja region, will take full advantage of this once-in-a-generation nearshoring opportunity remains an open question. Much will depend on whether Mexico and the state of Baja California proactively address several critical issues to maintain the region's competitiveness, including strengthening their regulatory framework; improving security and rule of law; ensuring adequate water supplies; providing clean, reliable & affordable energy (distribution and supply); expanding infrastructure and improving efficiency (land ports of entry, seaports, rail); and providing a skilled workforce. Also, greater inter- jurisdictional collaboration will be necessary between San Diego & Imperial Counties with Los Angeles, Orange County, and the Inland Empire.

San Diego and Tijuana’s joint selection as the first binational 2024 World Design Capital presents a unique opportunity for the region’s key stakeholders to think boldly about how to seize this historic moment, which holds the promise not only to create tens of thousands of quality jobs and expand Baja California’s regional economy, but also to improve the quality of life for residents on both sides of the border.

Recommended Actions (for Federal, State and Local Governments on U.S side of border)

U.S. Government

Classify medical equipment, essential medicines and PCBs as essential economic activities that must be produced in the U.S. or Mexico to ensure crisis preparedness in the case of a U.S. national emergency. This would spur investments to promote supply chain resiliency.

California

To leverage San Diego’s unique life science cluster, consider incentivizing the establishment of a biosimilars manufacturing facility in San Diego County.

San Diego & Imperial Counties

Biosimilar Manufacturing. To catalyze the potential of biosimilar manufacturing in the CaliBaja region, consider establishing a not-for-profit public benefit company leveraging the cross-border region’s strengths and incentives offered by the State of California under SB-852 and CALRx.

Workforce Development. Promote expanded cross-border workforce development opportunities for critical industries (electronics, life sciences, advanced manufacturing) and encourage expanded enrollment of Baja California students in San Diego & Imperial County area.

Sustainable Transportation. Improve mobility for cross-border commuters through the proposed binational trolley, San Diego-Ensenada ferry projects and expedited border crossings for pedestrians.

COMPARISON OF POPULATION AND EMPLOYMENT GROWTH RATES BY REGION

Tables 3-1 through 3-6 compare recent historic and longer-term population and employment growth trends for California, southern California, the Border Region and Imperial County.

Table 3-1 Percent Changes in Regional Economic Setting State of California 2014 – 2024			
Category	AVERAGE ANNUAL Percent Change 2014-24	1-Year Percent Change 2022-23	1-Year Percent Change 2023-24
Total Population	0.2%	-0.1%	0.2%
Non-farm Employment	1.6%	2.3%	1.2%
Source: CA DOF Table 2: E-5 City/County Population and Housing Estimates, January Years 2014 - 2024; CA EDD Current Employment Statistics (CES) January 2014-2024.			

Table 3-2 Percent Changes in Regional Economic Setting Southern California (10-County Area) 2014 – 2024			
Category	AVERAGE ANNUAL Percent Change 2014-24	1-Year Percent Change 2022-23	1-Year Percent Change 2023-24
Total Population	0.1%	-0.3%	0.2%
Non-farm Employment	1.4%	2.2%	0.9%
Source: CA DOF Table 2: E-5 City/County Population and Housing Estimates, January Years 2014 - 2024; CA EDD Current Employment Statistics (CES) January 2014-2024.			

Table 3-3 Percent Changes in Regional Economic Setting Border Region (Imperial/San Diego Counties) 2014 – 2024			
Category	AVERAGE ANNUAL Percent Change 2014-24	1-Year Percent Change 2022-23	1-Year Percent Change 2023-24
Total Population	0.2%	0.3%	0.1%
Non-farm Employment	1.6%	2.7%	1.2%
Source: CA DOF Table 2: E-5 City/County Population and Housing Estimates, January Years 2014 - 2024; CA EDD Current Employment Statistics (CES) January 2014-2024.			

Table 3-4 Percent Changes in Regional Economic Setting Imperial County 2014 – 2024			
Category	Average Annual Percent Change 2014-24	1-Year Percent Change 2022-23	1-Year Percent Change 2023-24
Total Population	0.2%	-0.4%	1.8%
Non-farm Employment	1.1%	4.4%	2.4%
Source: CA DOF Table 2: E-5 City/County Population and Housing Estimates, January Years 2014 - 2024; CA EDD Current Employment Statistics (CES) January 2014-2024.			

Table 3-5 Comparison of Population Growth Rates California, Southern California, Border Region and Imperial County 2014-2024				
AVERAGE ANNUAL Change by Period				
Time Period	California	Southern California	Border Region	Imperial County
2014-2024 (average annual growth rate)	0.2%	0.1%	0.2%	0.2%
2022-2023 (1-year change)	-0.1%	-0.3%	0.3%	-0.4%
2023-2024 (1-year change)	0.2%	0.2%	0.1%	1.8%
Source: CA DOF Table 2: E-5 City/County Population and Housing Estimates, January Years 2014 – 2024.				

Table 3-6 Comparison of Employment Growth Rates (Nonfarm Jobs) California, Southern California, Border Region and Imperial County 2014-2024				
AVERAGE ANNUAL Change by Period				
Category	California	Southern California	Border Region	Imperial County
2014-2024 (average annual growth rate)	1.5%	1.4%	1.6%	1.1%
2022-2023 (1-year change)	2.3%	2.2%	2.7%	4.4%
2023-2024 (1-year change)	1.2%	0.9%	1.2%	2.4%
Source: CA EDD Current Employment Statistics (CES) January 2014-2024.				

4. Local (County and City-Level) Economic Conditions

This chapter provides preliminary background information and data for the Comprehensive Economic Development Strategy (CEDS) being prepared for Imperial County. As an initial step in this process, the following sections evaluate key demographic and economic data at multiple levels of geography (city, county, and state) to allow for comparison of local conditions to reference-area benchmarks.

The first section (Census-Based Demographic and Economic Overview) provides a market overview that summarizes the most recent demographic and economic data from the following sources U.S. Census Bureau, American Community Survey (ACS) program. These data are grouped into the following categories: Economic Characteristics, Housing Units, Education, and Households. The second section (Jobs Overview Data) provides a summary of jobs located within Imperial County by major industry sectors and in-area labor force efficiency of Imperial County as well as surrounding counties, from data collected from U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment. The third section (Unemployment Rate Data) provides annual estimates for unemployment rates for all comparative geographies from data provided by the Bureau of Labor Statistics (BLS). The fourth section (Household and Employment Projection Forecasts) provides household and employment projection forecasts from the Southern California Association of Governments (SCAG). The fifth section (Tourism and Agriculture) provides data on tourism and agriculture for Imperial County and San Diego County from data collected from Visit California, U.S. Department of Transportation, and the Imperial County Agricultural Commissioner.

Census-Based Demographic and Economic Overview

The following data were obtained from the U.S. Census Bureau, American Community Survey (ACS) 5-year estimates (2018-2022). Data are provided for the Imperial County cities, Imperial County, Riverside County, San Diego County, Yuma County, the state of Arizona, and the state of California. See Appendix B for geographic boundary maps for the evaluated geographies. Topics address current conditions related to economic characteristics, housing units, educational attainment, and households/families.

It is important to note the distinction between the terms “employment” and “jobs” as discussed throughout this section, and the following section “Jobs Overview Data”. “Employment” is a characteristic of an area’s resident workforce; it refers to the residents of an area (i.e., city, county or other geography) that are currently employed, regardless of the location of their employment (i.e., they may hold jobs in their own community or commute to work outside the community). The term “jobs” relates to the place of work; thus, the reported number of jobs in a county refers to jobs that are based in that county, regardless of where the jobholder lives (i.e., they may be residents of the county or they may be non-residents who commute in from other counties).

Table 4-1 and Table 4-2 on the following pages, provide a summary of economic characteristics from ACS. These tables provide data related to labor force characteristics, household and per capita income levels, and health insurance coverage and poverty level rates for each of the Imperial County cities in comparison to Imperial County. Some of the key include data highlights of the include the following:

- For the 16 years and over population, Imperial County has a relatively lower share of the population (52.3%) in the labor force, compared to the individual cities in the county, and is lower than all of the county and state benchmarks.

- When comparing several similar counties that have both lower populations and are major agricultural producers in the state (Colusa County, Glenn County, Kings County, and Merced County), it is important to note that Imperial County had the lowest rate of all of these other counties.
- In terms of industry sector employment, the largest share of Imperial County residents (23.2%) are employed in the Educational services, and health care and social assistance industry sector (similar to the benchmark regions). Compared to the benchmark regions, Imperial County has a relatively larger share (9.8%) of residents employed in the Agriculture, forestry, fishing and hunting, and mining sector as well as the Public administration sector (10.7%). In contrast, the County has a relatively small share (3.8%) of its residents employed in the Manufacturing sector, Professional, scientific, and management, and administrative & waste management services sector (7.3%).
- For the income and benefits category, the largest share of County households (17.2%) is in the \$100,000 to \$149,000 household income range. However, almost 75% of the County's households make less than \$100,000 in household income with the median household income being \$53,847.
- Poverty rates – as measured by families and people whose income in the past 12 months was below the poverty level – for all categories of families are relatively higher (18.1%) in Imperial County compared to the benchmark regions.

TABLE 4-1. SELECTED ECONOMIC CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
EMPLOYMENT STATUS								
Population 16 years and over								
Labor Force Participation Rate	56.0%	54.4%	22.9%	58.0%	50.8%	58.5%	46.5%	52.3%
Employment/Population Ratio	45.7%	44.5%	19.6%	52.1%	45.1%	52.1%	37.2%	45.2%
Unemployment Rate	18.2%	18.1%	14.5%	10.2%	11.2%	10.7%	20.0%	13.2%
INDUSTRY								
Civilian employed population 16 years and over								
Agriculture, forestry, fishing and hunting, and mining	10.9%	8.5%	29.8%	7.7%	20.5%	2.6%	33.2%	9.8%
Construction	4.3%	6.1%	5.3%	6.4%	11.6%	4.1%	4.8%	6.2%
Manufacturing	2.7%	4.6%	11.4%	3.6%	0.5%	3.1%	1.3%	3.8%
Wholesale trade	4.2%	2.4%	3.1%	2.2%	14.3%	2.9%	0.0%	2.9%
Retail trade	9.6%	15.5%	9.3%	12.6%	4.3%	10.9%	17.0%	12.0%
Transportation and warehousing, and utilities	8.1%	7.2%	3.2%	6.3%	9.3%	6.4%	0.6%	6.7%
Information	0.8%	0.4%	0.0%	1.1%	0.0%	0.6%	1.3%	0.7%
Finance and insurance, & real estate & rental & leasing	3.2%	3.2%	0.0%	2.8%	0.7%	5.8%	1.5%	3.2%
Professional, scientific, & mgmt, & admin & waste mgmt srvc	8.8%	8.2%	10.4%	4.8%	5.0%	8.8%	8.2%	7.3%
Educational services, & health care & social assistance	22.2%	24.4%	16.1%	28.4%	14.5%	22.9%	18.5%	23.2%
Arts, entertainment, & recreation, & accommodation & food srvc	7.1%	7.9%	3.6%	8.5%	4.6%	13.6%	5.7%	9.4%
Other services, except public administration	2.4%	3.4%	3.9%	5.0%	1.5%	4.4%	2.1%	4.1%
Public administration	15.7%	8.3%	3.9%	10.8%	13.3%	14.1%	5.9%	10.7%
CLASS OF WORKER								
Civilian employed population 16 years and over								
Private wage and salary workers	65.8%	69.9%	77.1%	67.1%	71.6%	62.8%	83.8%	68.8%
Government workers	28.0%	23.5%	18.6%	25.8%	22.3%	31.6%	13.9%	24.7%
Self-employed in own not incorporated business workers	5.9%	6.3%	4.4%	7.1%	6.0%	4.7%	2.3%	6.1%
Unpaid family workers	0.3%	0.3%	0.0%	0.0%	0.0%	0.8%	0.0%	0.3%
INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)								
Total households								
Less than \$10,000	8.4%	6.0%	12.9%	6.4%	9.2%	3.1%	17.9%	7.4%
\$10,000 to \$14,999	4.9%	6.4%	9.4%	6.1%	2.0%	1.6%	7.0%	5.2%
\$15,000 to \$24,999	10.0%	14.6%	7.5%	10.7%	23.8%	8.3%	15.4%	12.5%
\$25,000 to \$34,999	11.3%	8.2%	10.3%	8.3%	6.4%	2.2%	13.6%	8.8%
\$35,000 to \$49,999	11.1%	14.0%	15.9%	14.9%	9.1%	14.7%	19.7%	13.3%
\$50,000 to \$74,999	13.4%	15.1%	27.3%	16.5%	13.3%	12.5%	7.2%	15.2%

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
\$75,000 to \$99,999	7.8%	10.3%	8.2%	12.1%	11.2%	19.9%	5.3%	11.1%
\$100,000 to \$149,999	23.0%	14.9%	8.6%	16.0%	15.1%	25.7%	7.0%	17.2%
\$150,000 to \$199,999	3.7%	5.6%	0.0%	4.5%	4.5%	3.7%	7.0%	4.3%
\$200,000 or more	6.4%	4.9%	0.0%	4.5%	5.5%	8.3%	0.0%	5.0%
Median household income (dollars)	\$56,229	\$51,667	\$43,095	\$54,922	\$44,939	\$83,029	\$31,827	\$53,847
Mean household income (dollars)	\$79,848	\$71,093	\$45,751	\$73,280	\$68,505	\$93,310	\$46,012	\$72,923
Per capita income (dollars)	\$25,017	\$19,676	\$9,080	\$22,039	\$22,444	\$25,203	\$12,474	\$21,216
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL								
All families	20.7%	19.3%	17.3%	17.8%	21.9%	9.2%	43.3%	18.1%
With related children of the householder under 18 years	29.3%	26.4%	27.2%	24.1%	17.3%	8.5%	55.7%	24.3%
With related children of the householder under 5 years only	29.4%	25.5%	0.0%	35.5%	0.0%	6.4%	34.2%	28.5%
Married couple families	10.0%	9.8%	0.0%	11.9%	15.5%	5.6%	21.7%	10.4%
With related children of the householder under 18 years	15.9%	13.0%	0.0%	15.0%	0.0%	1.3%	11.8%	12.4%
With related children of the householder under 5 years only	14.2%	23.0%	0.0%	17.8%	0.0%	0.0%	0.0%	16.5%
Families with female householder, no husband present	42.9%	42.6%	51.5%	36.6%	28.6%	20.4%	78.0%	38.6%
With related children of the householder under 18 years	53.5%	55.1%	65.1%	44.0%	60.9%	21.1%	80.5%	48.0%
With related children of the householder under 5 years only	53.6%	38.4%	-	59.0%	-	13.6%	100.0%	50.2%
All people	23.6%	22.6%	28.6%	21.1%	23.7%	11.1%	48.6%	21.1%
Under 18 years	31.9%	31.6%	41.1%	29.4%	25.7%	10.1%	61.1%	28.0%
Related children of the householder under 18 years	31.9%	31.4%	41.1%	29.3%	25.7%	9.2%	60.0%	27.8%
Related children of the householder under 5 years	28.4%	36.5%	60.4%	34.3%	2.3%	13.2%	67.7%	31.7%
Related children of the householder 5 to 17 years	33.4%	29.7%	35.7%	28.0%	33.0%	7.6%	55.6%	26.4%
18 years and over	20.0%	19.0%	23.1%	17.6%	23.0%	11.6%	41.6%	18.1%
18 to 64 years	20.1%	18.7%	23.7%	17.2%	18.6%	10.3%	43.8%	17.9%
65 years and over	19.7%	20.2%	20.5%	19.1%	38.5%	19.7%	33.2%	19.4%
People in families	22.7%	21.5%	24.0%	19.6%	22.5%	10.4%	50.2%	19.7%
Unrelated individuals 15 years and over	30.4%	33.9%	63.8%	33.6%	34.3%	17.5%	40.6%	31.9%

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

TABLE 4-2. SELECTED ECONOMIC CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
EMPLOYMENT STATUS						
Population 16 years and over						
Labor Force Participation Rate	52.3%	60.7%	66.2%	53.9%	60.5%	63.8%
Employment/Population Ratio	45.2%	56.4%	59.0%	47.1%	56.9%	59.3%
Unemployment Rate	13.2%	6.7%	6.3%	8.3%	5.4%	6.4%
INDUSTRY						
Civilian employed population 16 years and over						
Agriculture, forestry, fishing and hunting, and mining	9.8%	1.3%	0.7%	10.1%	1.3%	2.1%
Construction	6.2%	9.5%	6.5%	5.9%	7.5%	6.7%
Manufacturing	3.8%	8.2%	9.8%	5.8%	7.4%	8.9%
Wholesale trade	2.9%	2.7%	2.1%	3.3%	2.2%	2.6%
Retail trade	12.0%	12.3%	10.2%	10.8%	11.9%	10.3%
Transportation and warehousing, and utilities	6.7%	7.5%	4.5%	5.6%	5.7%	5.9%
Information	0.7%	1.5%	2.0%	1.0%	1.7%	2.9%
Finance and insurance, & real estate & rental & leasing	3.2%	5.0%	6.1%	4.0%	8.8%	5.8%
Professional, scientific, & mgmt, & admin & waste mgmt srvc	7.3%	10.2%	16.3%	8.6%	12.5%	14.1%
Educational services, & health care & social assistance	23.2%	20.8%	21.4%	21.3%	21.9%	21.4%
Arts, entertainment, & recreation, & accommodation & food srvc	9.4%	11.0%	10.6%	10.5%	9.9%	9.7%
Other services, except public administration	4.1%	4.9%	5.0%	4.0%	4.5%	4.9%
Public administration	10.7%	5.2%	4.9%	9.1%	4.8%	4.7%
CLASS OF WORKER						
Civilian employed population 16 years and over						
Private wage and salary workers	68.8%	77.9%	78.2%	74.9%	79.9%	78.0%
Government workers	24.7%	15.2%	14.2%	20.7%	13.9%	14.3%
Self-employed in own not incorporated business workers	6.1%	6.7%	7.4%	4.1%	6.0%	7.6%
Unpaid family workers	0.3%	0.2%	0.2%	0.3%	0.2%	0.2%
INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)						
Total households						
Less than \$10,000	7.4%	4.2%	3.9%	6.9%	4.9%	4.4%
\$10,000 to \$14,999	5.2%	2.8%	2.6%	4.5%	3.1%	3.2%
\$15,000 to \$24,999	12.5%	6.1%	5.2%	9.3%	6.7%	5.6%
\$25,000 to \$34,999	8.8%	6.6%	5.6%	9.8%	7.7%	6.0%
\$35,000 to \$49,999	13.3%	9.6%	8.1%	14.1%	11.5%	8.7%
\$50,000 to \$74,999	15.2%	15.2%	13.8%	20.2%	17.6%	13.7%

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
\$75,000 to \$99,999	11.1%	13.3%	12.1%	13.0%	13.7%	12.0%
\$100,000 to \$149,999	17.2%	19.4%	19.2%	13.3%	17.3%	17.8%
\$150,000 to \$199,999	4.3%	10.5%	11.7%	4.8%	8.3%	10.7%
\$200,000 or more	5.0%	12.3%	17.7%	4.1%	9.2%	17.9%
Median household income (dollars)	\$53,847	\$84,505	\$96,974	\$56,439	\$72,581	\$91,905
Mean household income (dollars)	\$72,923	\$110,021	\$129,234	\$74,377	\$98,569	\$130,718
Per capita income (dollars)	\$21,216	\$35,356	\$46,957	\$27,516	\$38,334	\$45,591
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL						
All families	18.1%	8.6%	7.0%	14.8%	9.2%	8.5%
With related children of the householder under 18 years	24.3%	12.3%	10.1%	20.6%	14.4%	12.5%
With related children of the householder under 5 years only	28.5%	10.7%	7.9%	22.0%	13.6%	9.7%
Married couple families	10.4%	5.3%	4.2%	8.8%	5.2%	5.1%
With related children of the householder under 18 years	12.4%	6.5%	5.6%	9.0%	7.3%	6.7%
With related children of the householder under 5 years only	16.5%	4.8%	4.4%	11.7%	6.3%	4.3%
Families with female householder, no husband present	38.6%	21.1%	18.4%	31.7%	23.0%	20.3%
With related children of the householder under 18 years	48.0%	30.2%	25.4%	40.2%	31.3%	29.2%
With related children of the householder under 5 years only	50.2%	32.0%	23.7%	35.8%	33.4%	30.3%
All people	21.1%	11.4%	10.6%	17.5%	13.1%	12.1%
Under 18 years	28.0%	14.8%	12.6%	24.6%	17.9%	15.6%
Related children of the householder under 18 years	27.8%	14.4%	12.3%	24.4%	17.5%	15.3%
Related children of the householder under 5 years	31.7%	14.8%	12.8%	27.2%	19.3%	15.6%
Related children of the householder 5 to 17 years	26.4%	14.3%	12.1%	23.3%	16.9%	15.2%
18 years and over	18.1%	10.3%	10.0%	15.1%	11.7%	11.1%
18 to 64 years	17.9%	10.2%	10.2%	15.2%	12.4%	11.1%
65 years and over	19.4%	10.3%	9.4%	14.8%	9.3%	11.0%
People in families	19.7%	9.1%	7.6%	15.9%	10.6%	9.3%
Unrelated individuals 15 years and over	31.9%	25.9%	22.4%	27.2%	22.7%	24.8%

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

Table 4-3 and Table 4-4, on the following pages, provides housing related data from ACS. Some of the data highlights include the following:

- The occupied housing rate ranged from 75.3% to 93.4%, which is notably different across all the benchmark regions. Imperial County's occupied housing rate falls at the lower end of the range at 82.6%.
- While Imperial County's homeowner vacancy (1.0%) and rental vacancy (3.3%) are consistent with other benchmark regions, Imperial County has a higher number of vacant housing units (17.4%) in comparison to the other benchmark regions.
 - Furthermore, Imperial County has the highest share of other vacant units (63.0%) in terms of vacancy status. The "Other vacant" category is used by the Census to classify vacant housing that does not fall into the other vacancy status categories listed. This category could refer to foreclosures, personal/family reasons, legal proceedings, preparing to rent/sell, held for storage of furniture, needs repairs, currently being repaired/renovated, specific use housing, extended absence, abandoned/possibly condemned, or other.
- Imperial County's occupied housing units are higher for owner-occupied (57.1%) than renter-occupied (42.3%).

TABLE 4-3. SELECTED HOUSING CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
TOTAL HOUSING UNITS								
Occupied housing units	86.2%	82.7%	75.3%	87.6%	81.7%	86.8%	83.5%	82.6%
Vacant housing units	13.8%	17.3%	24.7%	12.4%	18.3%	13.2%	16.5%	17.4%
Homeowner vacancy rate	0.0%	0.0%	9.5%	9.0%	2.5%	0.0%	0.0%	1.0%
Rental vacancy rate	4.4%	4.0%	4.9%	4.8%	5.1%	0.0%	4.5%	3.3%
VACANCY STATUS								
For rent	13.6%	0.9%	5.7%	17.5%	0.0%	8.3%	12.5%	6.9%
Rented, not occupied	0.9%	2.0%	0.0%	2.2%	0.0%	0.0%	0.0%	1.1%
For sale only	0.0%	0.0%	20.4%	3.2%	0.0%	7.6%	0.0%	2.7%
Sold, not occupied	5.6%	0.0%	0.0%	6.5%	0.0%	0.0%	0.0%	2.8%
For seasonal, recreational, or occasional use	1.0%	9.2%	0.0%	33.3%	0.0%	1.7%	6.3%	23.0%
For migrant workers	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Other vacant	78.8%	87.9%	73.9%	37.3%	100.0%	82.5%	81.3%	63.0%
HOUSING TENURE								
Occupied housing units								
Owner-occupied	53.1%	50.6%	63.9%	50.7%	65.8%	51.7%	47.8%	57.7%
Renter-occupied	46.9%	49.4%	36.1%	49.3%	34.2%	48.3%	52.2%	42.3%
Average HH size of owner-occupied unit	3.57	4.43	2.88	3.74	4.04	3.80	3.80	3.72
Average HH size of renter-occupied unit	3.45	3.75	3.60	3.42	3.82	3.66	4.43	3.55

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table 25004; TNDG.

TABLE 4-4. SELECTED HOUSING CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
TOTAL HOUSING UNITS						
Occupied housing units	82.6%	88.1%	93.4%	80.5%	88.4%	92.3%
Vacant housing units	17.4%	11.9%	6.6%	19.5%	11.6%	7.7%
Homeowner vacancy rate	1.0%	1.4%	0.8%	1.1%	1.2%	0.9%
Rental vacancy rate	3.3%	4.8%	3.9%	5.8%	5.0%	4.0%
VACANCY STATUS						
For rent	6.9%	11.8%	26.7%	8.0%	13.7%	22.6%
Rented, not occupied	1.1%	2.1%	7.7%	1.3%	3.5%	4.5%
For sale only	2.7%	7.2%	6.4%	3.3%	6.0%	6.4%
Sold, not occupied	2.8%	4.0%	5.4%	2.7%	4.2%	5.3%
For seasonal, recreational, or occasional use	23.0%	59.9%	29.9%	68.5%	50.8%	32.9%
For migrant workers	0.5%	0.7%	0.1%	3.1%	0.2%	0.2%
Other vacant	63.0%	14.3%	23.9%	13.1%	21.5%	28.2%
HOUSING TENURE						
Occupied housing units						
Owner-occupied	57.7%	68.5%	54.2%	69.1%	66.3%	55.6%
Renter-occupied	42.3%	31.5%	45.8%	30.9%	33.7%	44.4%
Average HH size of owner-occupied unit	3.72	3.23	2.87	2.69	2.62	2.99
Average HH size of renter-occupied unit	3.55	3.10	2.66	2.56	2.45	2.77

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table 25004; TNDG.

Table 4-5 and Table 4-6, below, provides education and social-related data from ACS. The tables show that Imperial County underperforms in terms of educational attainment relative to other benchmark regions for most variables. For the 18 to 24 years age category, the County has the lowest share of the population (3.2%) with a Bachelor’s degree or higher. Additionally, the County also has the lowest share of the population 25 years of age and older (15.9%) with a Bachelor’s degree or higher. Imperial County has the lowest median earnings for all levels of education for the population 25 years of age and older in comparison to all benchmark regions. The tables indicate that in comparison to all of the benchmark regions, Imperial County has the highest share of Hispanic³ or Latino population (85.4%) followed by Yuma County (65.3%).

³ According to U.S. Census Bureau definitions, “Hispanic or Latino” is an ethnic – not a racial – classification. Hispanic or Latino refers to refers to a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race. Thus, “Hispanic” is not listed as category on the “Race” portion of the table, since Hispanics can be members of any race.

TABLE 4-5. SELECTED EDUCATION AND SOCIAL CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
AGE BY EDUCATIONAL ATTAINMENT								
Population 18 to 24 years								
Less than high school graduate	4.6%	17.1%	35.9%	15.6%	0.0%	12.5%	42.7%	14.3%
High school graduate (includes equivalency)	46.4%	32.3%	32.3%	31.8%	28.6%	34.8%	30.8%	34.0%
Some college or associate's degree	42.5%	49.7%	31.8%	46.5%	68.5%	51.2%	20.9%	48.5%
Bachelor's degree or higher	6.4%	0.9%	0.0%	6.0%	3.0%	1.6%	5.6%	3.2%
Population 25 years and over								
Less than 9th grade	15.1%	19.9%	7.9%	14.7%	14.3%	7.2%	18.4%	14.3%
9th to 12th grade, no diploma	9.5%	15.4%	30.8%	13.0%	20.3%	12.7%	24.3%	14.4%
High school graduate (includes equivalency)	24.0%	19.3%	33.0%	24.9%	29.0%	24.3%	24.9%	25.3%
Some college, no degree	27.3%	18.0%	23.2%	22.0%	17.8%	28.3%	17.8%	22.5%
Associate's degree	8.9%	7.1%	3.7%	9.3%	6.9%	7.2%	8.4%	7.6%
Bachelor's degree	12.5%	16.1%	1.0%	10.5%	6.6%	13.7%	5.0%	11.8%
Graduate or professional degree	2.7%	4.1%	0.4%	5.6%	5.0%	6.6%	1.2%	4.1%
High school graduate or higher	75.5%	64.6%	61.3%	72.3%	65.3%	80.1%	57.2%	71.3%
Bachelor's degree or higher	15.2%	20.3%	1.4%	16.2%	11.6%	20.3%	6.1%	15.9%
1ST BACHELOR'S DEGREE								
Total population 25 years and over with a Bachelor's degree or higher								
Science and Engineering	34.1%	27.9%	36.4%	40.0%	35.3%	34.7%	20.7%	35.7%
Science and Engineering Related Fields	6.5%	8.2%	19.7%	8.3%	13.2%	13.0%	25.9%	9.2%
Business	19.5%	13.8%	6.1%	12.1%	7.6%	17.9%	0.0%	15.8%
Education	21.9%	16.4%	37.9%	18.5%	16.2%	6.1%	10.3%	15.3%
Arts, Humanities and Others	18.0%	33.8%	0.0%	21.2%	27.7%	28.3%	43.1%	24.0%
MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)								
Total population 25 years and over with earnings								
Less than high school graduate	\$28,060	\$19,164	\$24,330	\$24,873	\$14,021	\$18,712	\$26,184	\$22,867
High school graduate (includes equivalency)	\$29,566	\$25,859	\$29,254	\$33,324	\$43,958	\$46,687	\$48,750	\$33,299
Some college or associate's degree	\$45,153	\$30,962	\$40,099	\$38,545	\$78,679	\$47,281	-	\$38,768
Bachelor's degree	\$70,881	\$41,612	-	\$45,797	\$68,173	\$80,774	-	\$50,511
Graduate or professional degree	\$105,250	\$72,500	-	\$74,125	-	\$101,061	-	\$80,451
HISPANIC OR LATINO ORIGIN								
Not Hispanic or Latino	15.4%	2.2%	22.0%	11.8%	17.8%	19.5%	10.1%	14.6%
Hispanic or Latino	84.6%	97.8%	78.0%	88.2%	82.2%	80.5%	89.9%	85.4%

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
RACE								
White Alone	52.3%	41.6%	37.3%	27.2%	40.0%	50.2%	39.9%	39.5%
Black or African American Alone	0.9%	0.1%	12.6%	3.6%	1.2%	2.0%	0.4%	2.6%
American Indian and Alaska Native Alone	1.6%	0.6%	1.4%	0.8%	0.1%	0.1%	2.3%	1.5%
Asian Alone	1.2%	1.5%	0.7%	1.5%	1.3%	3.5%	0.5%	1.5%
Native Hawaiian and Other Pacific Islander Alone	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%
Some Other Race Alone	26.7%	35.1%	32.3%	46.0%	43.7%	24.9%	40.5%	34.8%
Two or More Races	17.3%	21.0%	15.5%	20.9%	13.6%	19.3%	16.2%	20.1%

Note: Values provided as shares unless where noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table B02001, Table 03001; TNDG.

TABLE 4-6. SELECTED EDUCATION CHARACTERISTICS AND SOCIAL, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
AGE BY EDUCATIONAL ATTAINMENT						
Population 18 to 24 years						
Less than high school graduate	14.3%	9.3%	8.0%	14.7%	14.4%	9.7%
High school graduate (includes equivalency)	34.0%	41.2%	35.2%	34.6%	34.9%	33.1%
Some college or associate's degree	48.5%	42.1%	44.3%	46.1%	40.5%	44.9%
Bachelor's degree or higher	3.2%	7.5%	12.4%	4.6%	10.2%	12.2%
Population 25 years and over						
Less than 9th grade	14.3%	9.0%	6.0%	12.4%	4.8%	8.7%
9th to 12th grade, no diploma	14.4%	7.9%	5.3%	11.4%	6.5%	6.9%
High school graduate (includes equivalency)	25.3%	26.8%	18.1%	26.4%	23.6%	20.4%
Some college, no degree	22.5%	23.7%	21.2%	24.8%	24.2%	20.1%
Associate's degree	7.6%	8.6%	8.4%	8.5%	9.1%	8.0%
Bachelor's degree	11.8%	15.4%	25.0%	10.7%	19.6%	22.1%
Graduate or professional degree	4.1%	8.7%	16.1%	5.7%	12.2%	13.8%
High school graduate or higher	71.3%	83.1%	88.7%	76.2%	88.7%	84.4%
Bachelor's degree or higher	15.9%	24.1%	41.0%	16.4%	31.8%	35.9%
1ST BACHELOR'S DEGREE						
Total population 25 years and over with a Bachelor's degree or higher						
Science and Engineering	35.7%	35.0%	44.1%	28.1%	34.0%	42.3%
Science and Engineering Related Fields	9.2%	10.1%	8.3%	10.5%	10.2%	8.3%
Business	15.8%	21.2%	18.6%	18.8%	21.3%	17.9%

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
Education	15.3%	8.8%	6.0%	20.6%	13.0%	5.8%
Arts, Humanities and Others	24.0%	24.9%	22.9%	22.0%	21.4%	25.7%
MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)						
Total population 25 years and over with earnings						
Less than high school graduate	\$22,867	\$31,997	\$29,530	\$26,259	\$30,398	\$29,750
High school graduate (includes equivalency)	\$33,299	\$39,689	\$38,034	\$32,657	\$36,792	\$38,446
Some college or associate's degree	\$38,768	\$46,761	\$46,491	\$38,899	\$43,812	\$46,575
Bachelor's degree	\$50,511	\$66,220	\$74,134	\$49,893	\$61,392	\$75,306
Graduate or professional degree	\$80,451	\$93,615	\$99,906	\$68,028	\$78,782	\$105,279
HISPANIC OR LATINO ORIGIN						
Not Hispanic or Latino	14.6%	49.2%	65.5%	34.7%	68.0%	60.3%
Hispanic or Latino	85.4%	50.8%	34.5%	65.3%	32.0%	39.7%
RACE						
White Alone	39.5%	46.8%	57.8%	58.1%	66.7%	48.1%
Black or African American Alone	2.6%	6.5%	4.8%	1.9%	4.6%	5.6%
American Indian and Alaska Native Alone	1.5%	1.0%	0.8%	1.3%	4.1%	1.0%
Asian Alone	1.5%	6.9%	12.1%	1.1%	3.4%	15.1%
Native Hawaiian and Other Pacific Islander Alone	0.0%	0.3%	0.4%	0.0%	0.2%	0.4%
Some Other Race Alone	34.8%	23.6%	9.2%	11.7%	7.7%	16.2%
Two or More Races	20.1%	14.9%	14.9%	25.8%	13.4%	13.5%

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table B02001, Table 03001; TNDG.

Table 4-7 and Table 4-8 below, provides selected household and age characteristics data from ACS. As shown in the table, average household and family sizes are higher in Imperial County relative to all other benchmark regions. In addition, the data for selected age categories show that Imperial County has the highest share of the youngest population in comparison to benchmark regions. For example, just under one-third (31.6%) of the County's population is 19 years old and younger, which is a higher share relative to other benchmark regions.

TABLE 4-7. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
HOUSEHOLDS								
Average household size	3.51	4.10	3.14	3.58	3.73	3.96	4.13	3.65
FAMILIES								
Average family size	4.25	4.83	3.83	4.12	4.74	4.66	4.49	4.36
AGE OF OWN CHILDREN								
Households with own children of the householder under 18 years								
Under 6 years only	18.7%	13.6%	13.6%	16.6%	12.1%	11.9%	18.7%	15.5%
Under 6 years and 6 to 17 years	28.0%	25.5%	21.0%	19.9%	32.2%	31.4%	39.4%	24.2%
6 to 17 years only	53.3%	60.9%	65.4%	63.5%	55.7%	56.7%	41.9%	60.4%
SELECTED HOUSEHOLDS BY TYPE								
Households with 1 or more people under 18 years	40.0%	42.8%	28.7%	42.4%	30.5%	45.4%	43.3%	39.8%
Households w/ 1 or more people 60 years and over	38.2%	50.2%	46.3%	42.2%	56.0%	35.0%	41.1%	43.5%
Households w/ 1 or more people 65 years and over	28.3%	41.6%	38.8%	34.3%	39.0%	20.8%	30.4%	33.9%
Householder living alone	22.6%	21.5%	26.5%	18.7%	27.4%	18.8%	19.3%	22.6%
65 years and over	9.9%	11.1%	9.6%	9.9%	13.8%	4.5%	7.4%	9.9%
SELECTED AGE CATEGORIES (POPULATION)								
Under 5 years	9.2%	7.3%	3.5%	6.6%	6.2%	10.0%	12.5%	7.5%
5 to 9 years	8.5%	7.4%	3.0%	9.0%	4.1%	8.5%	9.6%	7.4%
10 to 14 years	7.5%	9.6%	6.6%	9.7%	11.8%	10.3%	10.2%	8.8%
15 to 19 years	7.5%	7.9%	4.6%	7.9%	7.5%	10.6%	14.5%	7.9%
20 to 24 years	8.1%	6.3%	8.1%	6.6%	10.0%	6.4%	6.0%	7.1%
25 to 34 years	15.8%	14.3%	27.1%	13.9%	8.2%	9.3%	8.2%	14.7%
35 to 44 years	11.2%	11.5%	19.9%	11.6%	12.1%	12.5%	13.9%	12.3%
45 to 54 years	11.5%	10.5%	10.8%	10.8%	10.4%	10.5%	5.5%	11.0%
55 to 59 years	5.4%	5.4%	3.5%	4.2%	4.1%	6.5%	3.8%	5.2%
60 to 64 years	3.7%	4.2%	5.9%	5.7%	9.2%	6.3%	3.2%	5.0%
65 to 74 years	5.7%	9.8%	5.2%	7.6%	8.3%	5.1%	4.9%	7.6%
75 to 84 years	4.6%	4.3%	1.6%	4.0%	5.6%	3.0%	6.2%	4.0%
85 years and over	1.3%	1.6%	0.4%	2.3%	2.6%	0.9%	1.6%	1.6%

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

TABLE 4-8. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
HOUSEHOLDS						
Average household size	3.65	3.19	2.78	2.65	2.56	2.89
FAMILIES						
Average family size	4.36	3.70	3.34	3.10	3.13	3.47
AGE OF OWN CHILDREN						
Households with own children of the householder under 18 years						
Under 6 years only	15.5%	16.7%	23.0%	20.9%	20.0%	19.9%
Under 6 years and 6 to 17 years	24.2%	22.7%	18.7%	25.1%	21.8%	19.8%
6 to 17 years only	60.4%	60.6%	58.3%	54.0%	58.1%	60.4%
SELECTED HOUSEHOLDS BY TYPE						
Households with 1 or more people under 18 years	39.8%	37.6%	31.7%	36.5%	30.1%	33.3%
Households w/ 1 or more people 60 years and over	43.5%	43.8%	38.7%	46.8%	42.8%	40.8%
Households w/ 1 or more people 65 years and over	33.9%	33.4%	29.1%	38.2%	33.3%	30.8%
Householder living alone	22.6%	20.0%	24.1%	22.1%	27.1%	23.9%
65 years and over	9.9%	9.8%	9.2%	12.3%	11.6%	9.7%
SELECTED AGE CATEGORIES (POPULATION)						
Under 5 years	7.5%	6.0%	5.8%	6.9%	5.6%	5.7%
5 to 9 years	7.4%	6.7%	5.7%	6.6%	6.1%	6.0%
10 to 14 years	8.8%	7.5%	6.2%	7.4%	6.6%	6.6%
15 to 19 years	7.9%	7.4%	6.3%	7.1%	6.7%	6.6%
20 to 24 years	7.1%	6.9%	7.4%	7.7%	7.0%	6.8%
25 to 34 years	14.7%	13.8%	16.1%	13.9%	13.7%	15.0%
35 to 44 years	12.3%	13.2%	13.9%	11.2%	12.5%	13.6%
45 to 54 years	11.0%	12.2%	12.2%	9.8%	11.7%	12.6%
55 to 59 years	5.2%	6.0%	6.0%	4.7%	6.0%	6.2%
60 to 64 years	5.0%	5.6%	5.8%	5.0%	6.1%	5.9%
65 to 74 years	7.6%	8.5%	8.6%	9.7%	10.4%	8.7%
75 to 84 years	4.0%	4.6%	4.3%	7.8%	5.7%	4.3%
85 years and over	1.6%	1.7%	1.8%	2.2%	1.9%	1.9%

Note: Values are provided as shares unless otherwise noted.

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

Jobs Overview Data

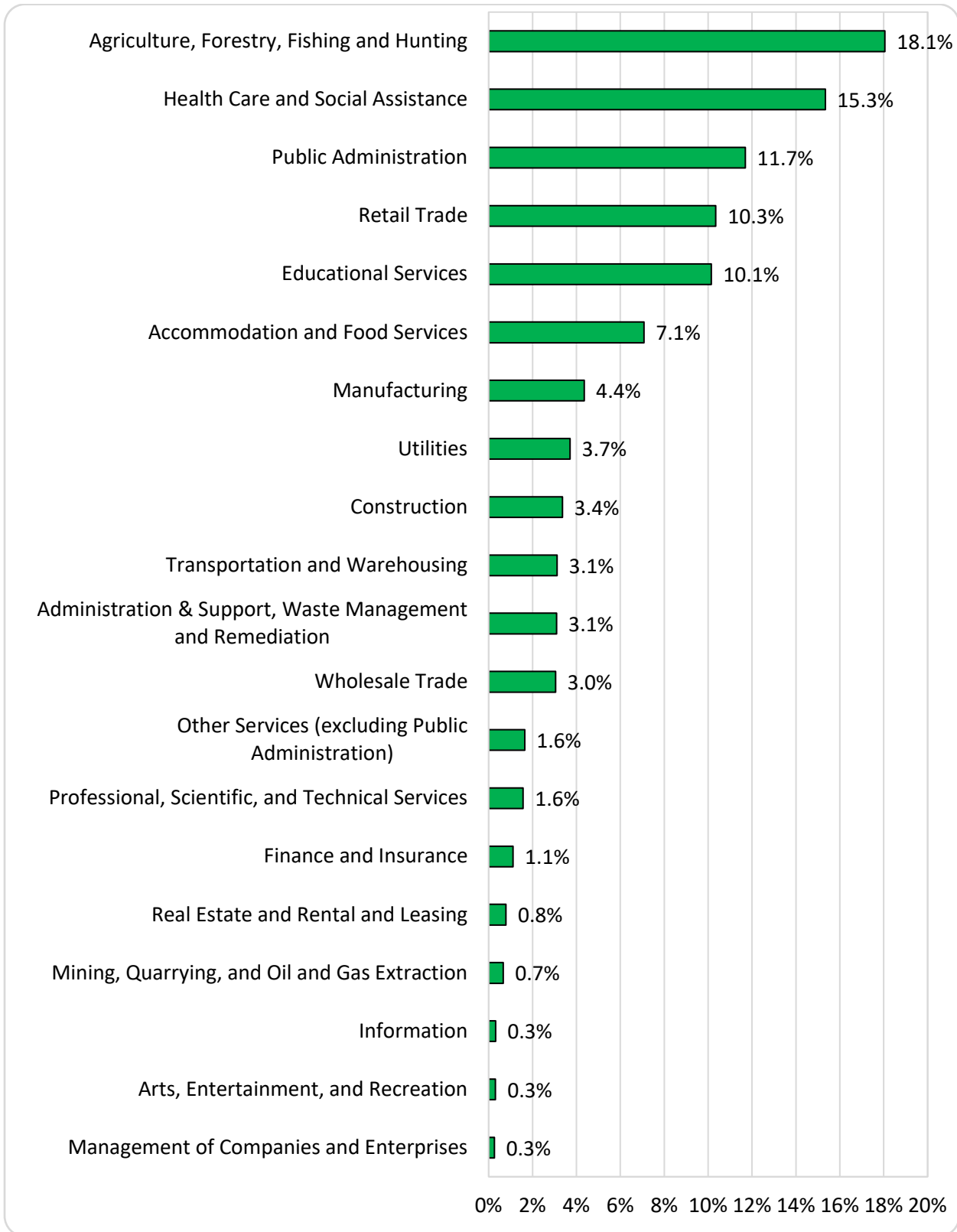
The following data were obtained from the U.S. Census Bureau, Center for Economic Studies OnTheMap Longitudinal Employer-Household Dynamics (LEHD) program for 2021. Data are provided for Imperial County, Riverside County, San Diego County, and Yuma County.

Figure 4-1 on the following page provides the share of employment by industry for Imperial County-based jobs in 2021. The major industry groupings correspond to 2-digit NAICS⁴ codes industries. In terms of concentration of industry employment, Imperial County has the highest concentration of jobs in Agriculture, Forestry, Fishing and Hunting (18.1%), Health Care and Social Assistance (15.3%), Public Administration (11.7%), Retail Trade (10.3%), and Educational Services (10.1%), which account for just under two-thirds (65.6%) of total number of jobs in the County.

Subsequently following Figure 4-1, Figure 4-2 provides a breakdown of the In-Area Labor Force Efficiency of Imperial County and each of the surrounding benchmark counties. These data are for resident workers who live within the same county where they work. Within the region, the counties with the highest concentrations of resident workers living and working in the same county were San Diego County and Yuma County (79.6%), which are above the regional average of 67.1%. Imperial County (65.7%) is just slightly lower than the regional average, however Riverside County (46.4%) is considerably lower than the regional average of resident workers that both live and work within the same county.

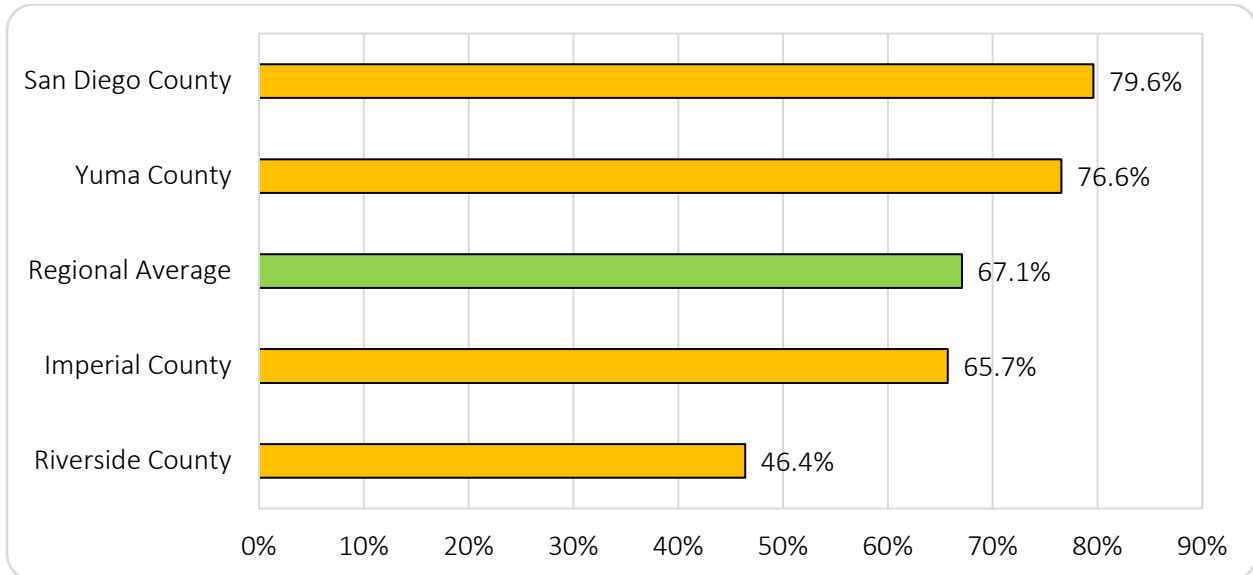
⁴ NAICS = North American Industry Classification System.

FIGURE 4-1. IMPERIAL COUNTY JOBS BY INDUSTRY SECTOR, 2021



Source: U.S. Census Bureau, 2021: OnTheMap LEHD Origin-Destination Employment 2nd Quarter 2021; TNDG.

**FIGURE 4-2. IN-AREA LABOR FORCE EFFICIENCY,
PERCENT LIVING AND WORKING IN THE SAME LOCATION, 2021**

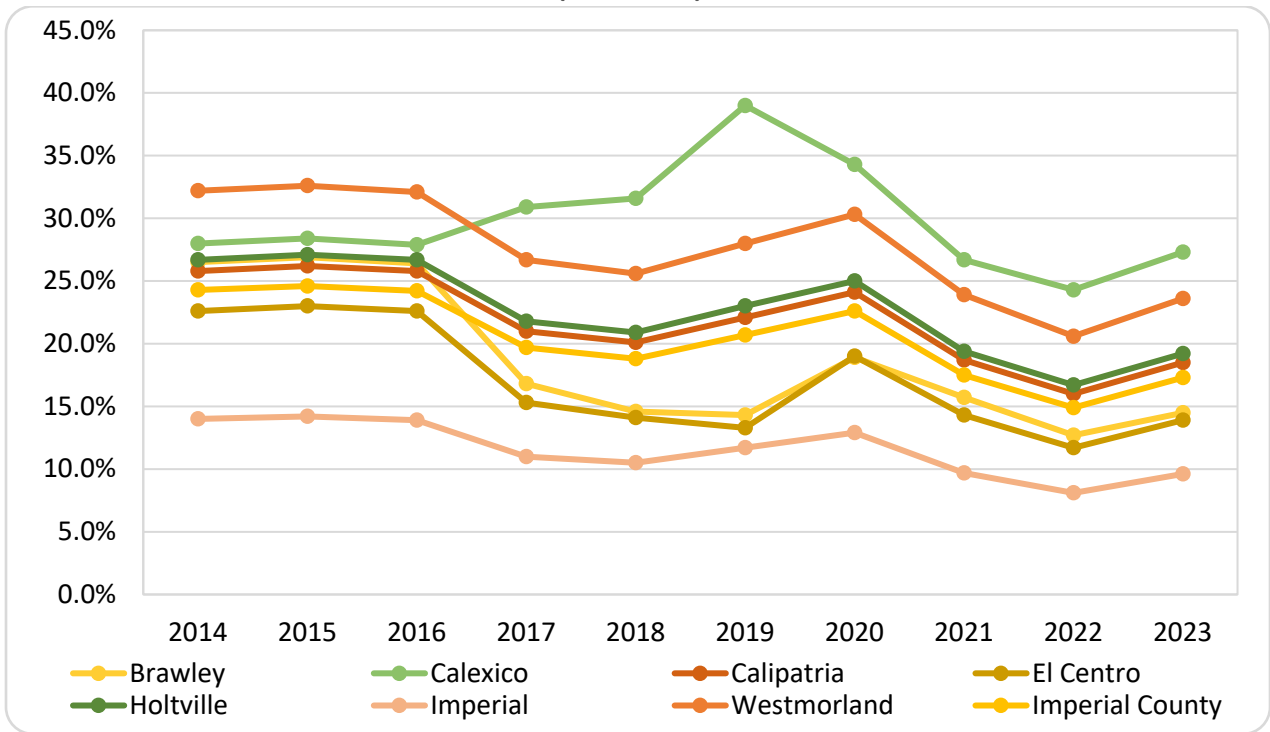


Source: U.S. Census Bureau, 2021: OnTheMap LEHD Origin-Destination Employment 2nd Quarter 2021; TNDG.

Unemployment Rate Data

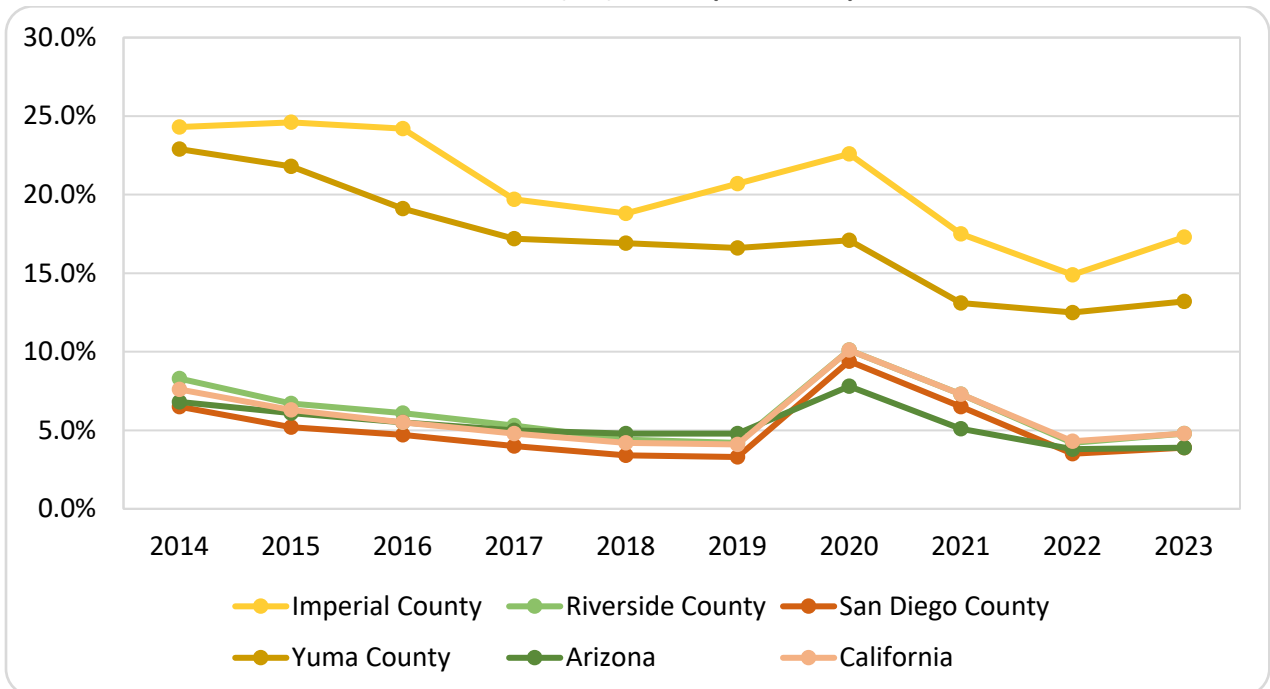
The U.S. Bureau of Labor and Statistics (BLS) provides unemployment rate estimates through its Local Area Unemployment Statistics (LAUS) program. Figure 4-3 and Figure 4-4 on the following page, provides annual average unemployment rate estimates for Imperial County cities, Imperial County, Riverside County, San Diego County, Yuma County, Arizona, and California for the 10-year period from 2014 to 2023. As shown in the figure, all geographies experienced a similar trend in unemployment rates during this period. Due to the coronavirus pandemic, all evaluated geographies experienced a significant increase in unemployment rates, with Calexico experiencing the most notable increase of 39.0% in 2019 and then 34.3% in 2020 of all the other cities in Imperial County. Imperial County experienced the most notable increase (22.6%) percentage points between 2019 and 2020 in comparison to the other counties and states. However, by 2022, the unemployment rate in Imperial County had fallen all to 14.9%, which was lower than any of the years going back to 2014. By comparison, San Diego County experienced the lowest unemployment rate of 8.1% in 2022 in comparison to all geographies.

FIGURE 4-3. UNEMPLOYMENT RATE ESTIMATES: IMPERIAL COUNTY CITIES AND IMPERIAL COUNTY (2014-2023)



Source: Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics (LAUS) program; TNDG.

FIGURE 4-4. UNEMPLOYMENT RATE ANNUAL ESTIMATES: IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA (2014-2023)



Source: Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics (LAUS) program; TNDG.

Household and Employment Projection Forecasts

Table 4-9, below, shows the most recent Southern California Association (SCAG) demographic and employment forecasts for the cities in Imperial County, the unincorporated areas of Imperial County, Imperial County, and Riverside County. The table shows the absolute change and change in percentage (households and employment) for the 2019-2035 and 2035-2050 time interval projection periods. These projections are from SCAG’s Draft 2024 RTP/SCS (“Connect SoCal 2024”) locally reviewed growth projections.

The table shows that household growth for Calexico (35.6%), Imperial (31.7%), Calipatria (30.0%), and unincorporated areas of Imperial County (26.8%) are projected to increase at higher rates over the first 16-year period (2019-2035), with Imperial County projected to add 13,000 households during this period. Imperial County is projected to add 12,500 employees over the first 16-year period (2019-2035), which is percentage change of 18.0% for the entire county. For the 2035-2050 period, Imperial County is projected to add about 8,700 employees, a growth rate less than Riverside County and several of the cities within the County.

TABLE 4-9. SCAG REGIONAL GROWTH PROJECTIONS: CITIES IN IMPERIAL COUNTY, UNINCORPORATED IMPERIAL COUNTY, IMPERIAL COUNTY, AND RIVERSIDE COUNTY

Area	2019-35		2035-50	
	# Change	% Change	# Change	% Change
Households				
Brawley	1,700	20.7%	1,100	11.1%
Calexico	3,700	35.6%	1,700	12.1%
Calipatria	300	30.0%	100	7.7%
El Centro	2,600	18.6%	2,100	12.7%
Holtville	200	11.8%	200	10.5%
Imperial	1,900	31.7%	900	11.4%
Westmorland	0	0.0%	0	0.0%
Unincorporated Imperial County	2,600	26.8%	800	6.5%
Imperial County	13,000	25.2%	6,900	10.7%
Riverside County	220,400	29.6%	97,500	10.1%
Employees				
Brawley	1,100	13.3%	700	7.4%
Calexico	2,100	19.4%	1,200	9.3%
Calipatria	300	15.8%	100	4.5%
El Centro	4,700	18.6%	3,800	12.7%
Holtville	200	11.1%	100	5.0%
Imperial	1,400	24.1%	1,000	13.9%
Westmorland	0	0.0%	0	0.0%
Unincorporated Imperial County	2,700	17.8%	1,800	10.1%
Imperial County	12,500	18.0%	8,700	10.6%
Riverside County	209,400	24.7%	128,300	12.1%

Source: SCAG 2024 RTP/SCS Growth Projections; TNDG.

Tourism and Agriculture

Tourism Spending

In 2023, travel spending in California grew to \$150.4 billion, a 5.6% increase from the prior year. Since 2019, travel spending has increased by 3.8%. Direct travel spending in 2023 increased 5.6% in current dollars. Adjusted for inflation, travel spending in 2023 was down 14% from the peak (in 2019). In 2023, spending made by domestic visitors (residents of the U.S.) accounted for 82% of all travel spending in California. International visitors accounted for 18% of travel spending in the state. Historically, international spending constituted 18-22% of total travel spending in California⁵.

The following data were obtained from the Visit California report – *The Economic Impact of Travel in California, 2023 prepared by Dean Runyan Associates*. Data are provided for Imperial County and San Diego County. Tables 4-10 through 4-13 show the amount and share of visitor spending by commodity purchased during the time interval period from 2014 to 2023 for both Imperial County and San Diego County respectively. When comparing the two counties, the following conditions show a noticeable contrast:

- As a percent of total spending by commodity, accommodations is a noticeably higher percentage in San Diego County.
- Although retail sales as a percentage is higher in San Diego County, food store sales are a considerably higher percentage in Imperial, as are local transportation expenditures.
- Interestingly, the percents of expenditures by commodity are similar for both counties in Food Services and in Arts, Entertainment, and Recreation.
- From the above observations, although spending related to cross-border visitations would ideally be considered separately from tourism purchases, the data suggest that cross-border spending is a factor in the Imperial County visitation-spending figures.
- Spending figures in the tables have not been adjusted for inflation; nevertheless, increases in spending overall have exceeded the rate of inflation in both counties, but by a considerably higher margin in Imperial County – 50% over the 2014-2023 period, compared to the underlying US rate of inflation of 28% from 2014 to 2023.

⁵ Visit California, *California Travel Forecast (June 2024)*.

TABLE 4-10. IMPERIAL COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (\$MILLIONS) (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. (14-23)
Accommodations	\$57.2	\$58.7	\$59.9	\$62.0	\$65.8	\$70.3	\$64.2	\$80.3	\$89.0	\$91.1	59.3%
Food Service	\$89.3	\$92.0	\$95.9	\$101.8	\$108.5	\$114.0	\$77.8	\$115.6	\$131.2	\$139.4	56.1%
Food Stores	\$42.1	\$43.7	\$44.1	\$44.9	\$45.7	\$48.2	\$37.1	\$52.0	\$65.3	\$70.4	67.2%
Arts, Ent. & Rec.	\$45.9	\$46.3	\$47.3	\$49.1	\$51.0	\$52.4	\$34.8	\$49.2	\$54.7	\$57.4	25.1%
Retail Sales	\$34.0	\$29.6	\$30.0	\$35.3	\$41.2	\$46.5	\$28.3	\$44.8	\$50.9	\$51.0	50.0%
Local Tran. & Gas	\$61.3	\$55.7	\$51.0	\$56.9	\$65.5	\$69.4	\$38.2	\$61.5	\$88.3	\$85.2	39.0%
Total	\$329.8	\$326.0	\$328.2	\$350.0	\$377.7	\$400.8	\$280.4	\$403.4	\$479.4	\$494.5	49.9%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 4-11. SHARE OF IMPERIAL COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Accommodations	17.3%	18.0%	18.3%	17.7%	17.4%	17.5%	22.9%	19.9%	18.6%	18.4%
Food Service	27.1%	28.2%	29.2%	29.1%	28.7%	28.4%	27.7%	28.7%	27.4%	28.2%
Food Stores	12.8%	13.4%	13.4%	12.8%	12.1%	12.0%	13.2%	12.9%	13.6%	14.2%
Arts, Ent. & Rec.	13.9%	14.2%	14.4%	14.0%	13.5%	13.1%	12.4%	12.2%	11.4%	11.6%
Retail Sales	10.3%	9.1%	9.1%	10.1%	10.9%	11.6%	10.1%	11.1%	10.6%	10.3%
Local Tran. & Gas	18.6%	17.1%	15.5%	16.3%	17.3%	17.3%	13.6%	15.2%	18.4%	17.2%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 4-12. SAN DIEGO COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (\$Millions) (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. (14-23)
Accommodations	\$2,675.0	\$2,908.0	\$3,146.0	\$3,288.0	\$3,588.0	\$3,472.0	\$1,729.0	\$3,077.0	\$4,427.0	\$4,587.0	71.5%
Food Service	\$2,843.0	\$2,907.0	\$3,136.0	\$3,330.0	\$3,045.0	\$3,080.0	\$1,337.0	\$2,676.0	\$3,367.0	\$3,546.0	24.7%
Food Stores	\$467.0	\$506.0	\$518.0	\$528.0	\$472.0	\$472.0	\$205.0	\$522.0	\$665.0	\$687.0	47.1%
Arts, Ent. & Rec.	\$1,613.0	\$1,584.0	\$1,672.0	\$1,729.0	\$1,610.0	\$1,588.0	\$589.0	\$1,294.0	\$1,584.0	\$1,685.0	4.5%
Retail Sales	\$1,687.0	\$1,686.0	\$1,757.0	\$1,873.0	\$1,788.0	\$1,837.0	\$684.0	\$1,452.0	\$1,777.0	\$1,838.0	9.0%
Local Tran. & Gas	\$510.0	\$458.0	\$436.0	\$484.0	\$477.0	\$480.0	\$162.0	\$403.0	\$587.0	\$561.0	10.0%
Total	\$9,795.0	\$10,049.0	\$10,665.0	\$11,232.0	\$10,980.0	\$10,929.0	\$4,706.0	\$9,424.0	\$12,407.0	\$12,904.0	31.7%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 4-13. SHARE OF SAN DIEGO COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (2014-2023)

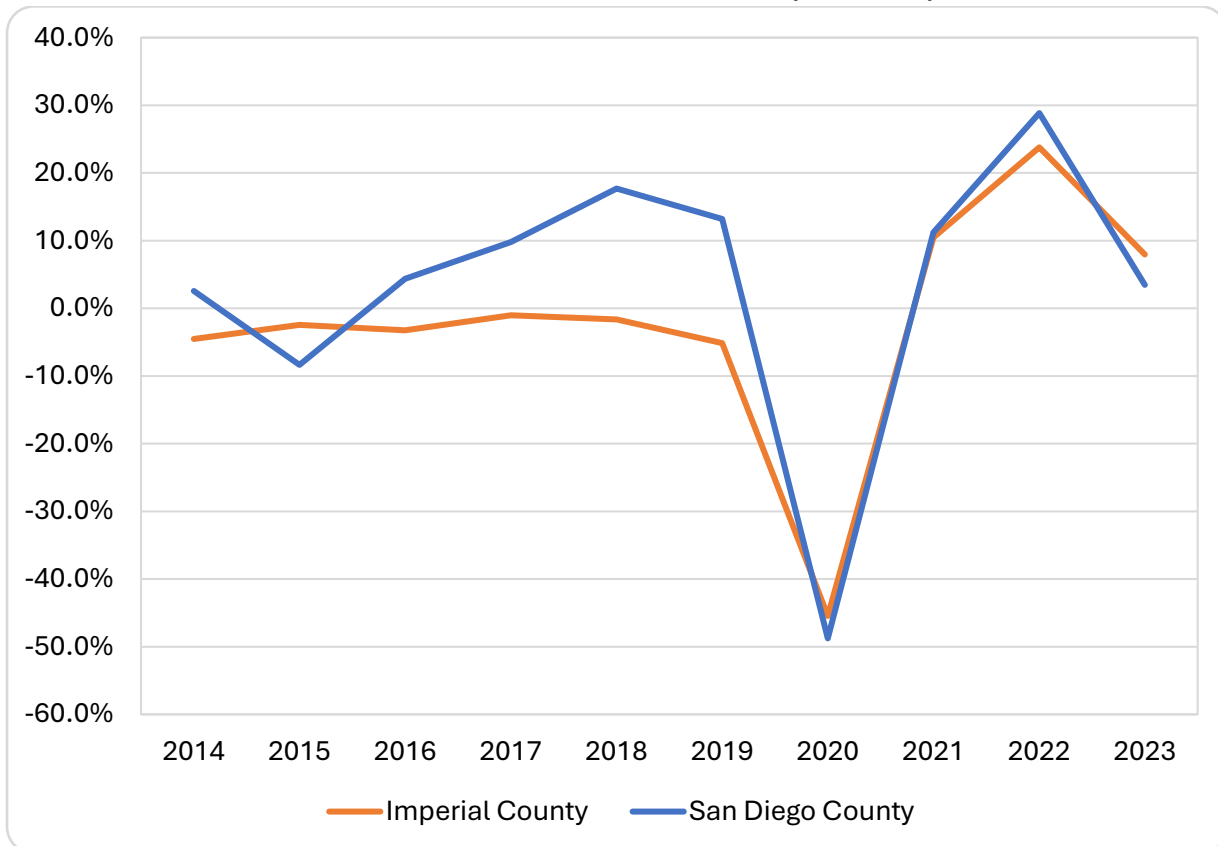
Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Accommodations	27.3%	28.9%	29.5%	29.3%	32.7%	31.8%	36.7%	32.7%	35.7%	35.5%
Food Service	29.0%	28.9%	29.4%	29.6%	27.7%	28.2%	28.4%	28.4%	27.1%	27.5%
Food Stores	4.8%	5.0%	4.9%	4.7%	4.3%	4.3%	4.4%	5.5%	5.4%	5.3%
Arts, Ent. & Rec.	16.5%	15.8%	15.7%	15.4%	14.7%	14.5%	12.5%	13.7%	12.8%	13.1%
Retail Sales	17.2%	16.8%	16.5%	16.7%	16.3%	16.8%	14.5%	15.4%	14.3%	14.2%
Local Tran. & Gas	5.2%	4.6%	4.1%	4.3%	4.3%	4.4%	3.4%	4.3%	4.7%	4.3%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

Mexico-United States Cross Border Visitation

The following data were obtained from the U.S. Department of Transportation, Border Crossing Entry Data for the time interval period from 2014 to 2023 for Imperial County and San Diego County. Figure 4-5 below shows that annual percent change in pedestrian visits from Mexico to the U.S. was mostly positive for San Diego County until the COVID-19 Pandemic, but has since recovered with a slight gain ending in 2023. Comparatively, Imperial County was declining each year evaluated, but since the recovery of the COVID-19 Pandemic, foot traffic has increased and is improving at a higher percent change than San Diego County as of 2023.

FIGURE 4-5. PEDESTRIAN FOOT TRAFFIC CROSS BORDER VISIT ANNUAL PERCENTAGE CHANGE, IMPERIAL COUNTY AND SAN DIEGO COUNTY (2014-2023)



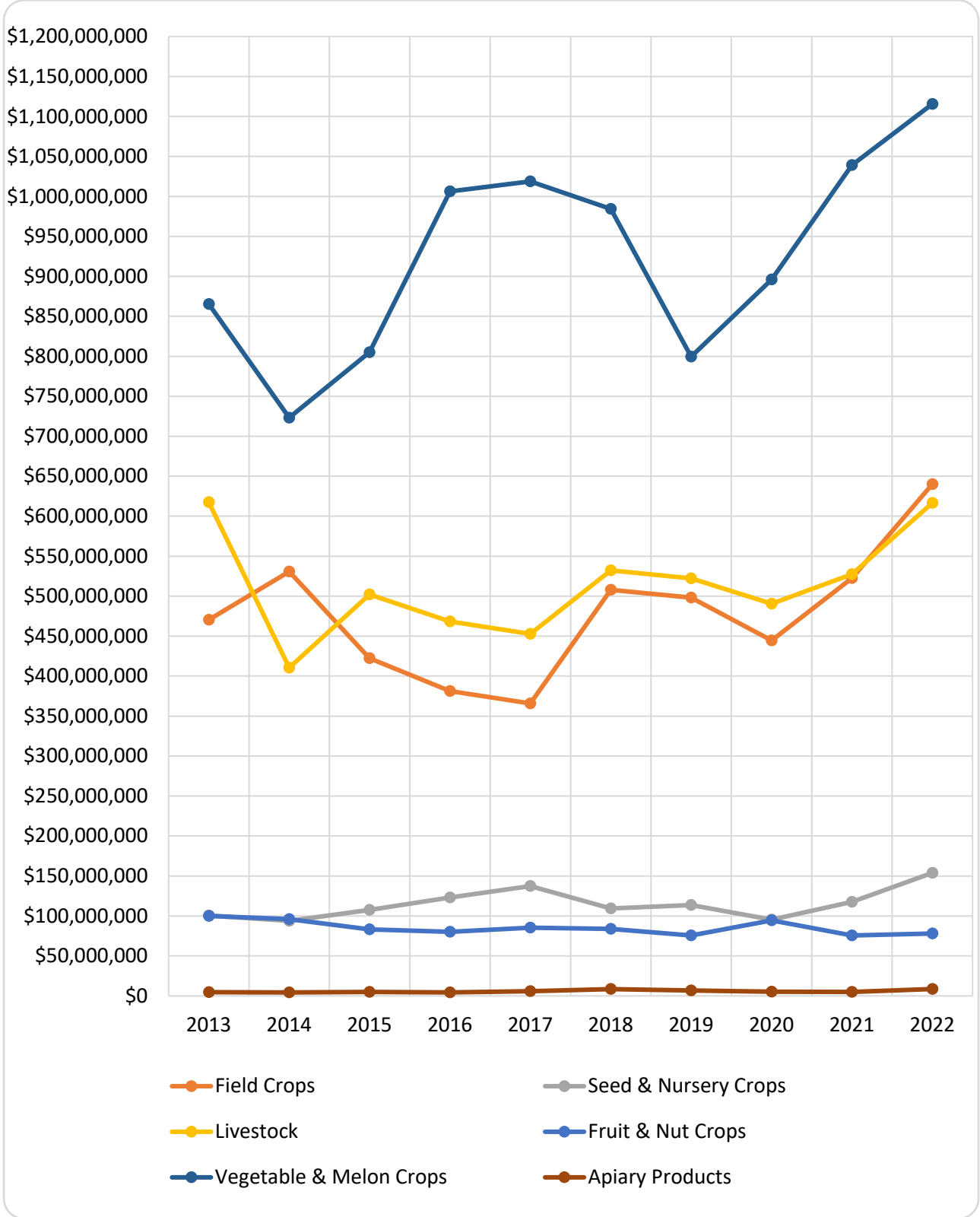
Source: U.S. Department of Transportation, Border Crossing Entry Data; TNDG.

Agriculture

The following data were obtained from Imperial County Agricultural Commissioner, Agricultural Crop & Livestock Reports, for the time interval period from 2013 to 2022. Data are provided for Imperial County. Agriculture is an important industry in the county and a major user of land. It is also an evolving industry that will continue to have an expanded relationship with technology, as farming continues to become more mechanized, and technology driven.

Figure 4-6 displays data for agricultural products receipts by agricultural product type. Currently in Imperial County, vegetable & melon crops have the highest receipts, followed by livestock, field crops, and then by livestock. Notably, livestock receipts have been in a repetitive cycle of highs in lows since 2013, with the greatest decreases in 2017 and 2020 during the pandemic in 2020. Though livestock has made a recovery since the pandemic of 2020, receipts have not exceeded the level of receipts captured in 2013. Seed & nursesey crops, fruit & nut crops, as well as apiary products, make up the smallest proportions of agricultural receipts in the county.

FIGURE 4-6. IMPERIAL COUNTY AGRICULTURAL PRODUCTS COMPARATIVE SUMMARY (CURRENT DOLLARS) (2013-2022)



Source: Imperial County Agricultural Commissioner, Agricultural Crop & Livestock Reports, 2013-2022; TNDG.

5. Industry Cluster Analysis

Overview

This chapter provides a summary of industry growth/retraction trends in Imperial County (and immediately surrounding Riverside and San Diego Counties), comparing the regional economy's recent and longer-term performance to other regional and national benchmarks.

This analysis evaluates the regional economy in terms of industry "clusters." Clusters are groups of inter-related industry sectors whose growth potentials within a region tend to be closely aligned. The tendency of individual industries to co-locate in clusters reflects linkages through supply-chain relationships, as well as commonalities in terms of workforce requirements and infrastructure needs. The concept of industry clusters is an effective framework for economic development programming since it reflects a holistic understanding of the regional economic conditions driving the growth or retraction of individual sectors.

The industry clusters have been identified on the basis of existing and recent historic strengths; they represent an initial "opportunity set" based on an in-depth evaluation of current and historic employment trends by industry. A final list of targeted clusters will be identified as part of the CEDS implementation process.

Definitions and Focus of Cluster Study

The clusters analyzed in this chapter are based on definitions (i.e., industry groupings) from the U.S. Cluster Mapping Project (Cluster Mapping Project), an economic development initiative led by Harvard Business School's Institute for Strategy and Competitiveness.

In accordance with the North American Industry Classification System (NAICS), the U.S. economy includes a total of approximately 1,100 individual industry sectors. The U.S. Cluster Mapping Project assigns each of these sectors to unique clusters, which are based on linkages through supply-chain relationships, as well as commonalities in terms of workforce requirements and infrastructure needs. Nationally, the Cluster Mapping Project recognizes a total of 67 clusters, with 16 classified as "local" clusters and 51 classified as "traded" clusters.

Total current (2023) employment in Imperial County is estimated at 72,686 jobs⁶. The local clusters currently represent a total of 56,293 jobs in the County, while the traded clusters account for 20,679 jobs. Total cluster employment adds up to slightly more than total employment given that some industries are included in more than one cluster⁷.

Whereas local and traded clusters are both critically important components of a balanced economy, they have distinct roles and characteristics, and these distinctions can be helpful in terms of planning economic development programs. Some of these distinctions are summarized as follows:

- **Local clusters** typically form the core of a region's economy; they primarily provide goods and services for the local (resident) population. They tend to account for the majority of jobs in a region (in the case of Imperial, local clusters represent about 73% of total cluster-related jobs), and support a high quality of life by ensuring the availability of a diverse range of goods and services. In Imperial County, important local clusters include *Local Community and Civic Organizations*, *Local Education and Training*, *Local Government Services*, and *Local Health Services*. These clusters account for more than one-third (33.9%) of Imperial County's total jobs.
- **Traded clusters** are "export-oriented" in the sense that they include industries that are engaged in producing goods and services for end customers outside the region. Traded clusters account for about 27% of cluster-related jobs in Imperial County, and they are especially important from an economic development perspective given that they tend to have higher wages and higher "multiplier impacts" compared to local clusters. That is, they have a strong potential to inject new dollars into the local economy and thereby serve as "drivers" for broader economic growth. In the County, important traded clusters include *Agricultural Inputs and Services* and *Distribution and Electronic Commerce*. These two clusters account for 64% of the traded cluster total in Imperial County.

⁶ All employment data used in this analysis are from EMSI – a private data/modeling firm nationally regarded for its ability to provide detailed (6-digit NAICS code) industry employment estimates for various levels of geographies, ranging from zip codes, counties, states, and the entire U.S.

⁷ EMSI has made some adjustments to the cluster definitions to account for changes in the NAICS industry structure between 2012, 2017, and 2022 NAICS industry definitions.

Existing Important Clusters in Imperial, Riverside, and San Diego Counties

Table 5-1, on page XX, lists all traded clusters that had 100 or more jobs in Imperial County in 2023, and provides the following information about each listed cluster:

- Total number of jobs in Imperial County in 2023 (the latest full year for which data are available)
- Location quotient (compared to U.S. benchmark) in 2023. The location quotient (LQ) measures how concentrated/important an industry cluster is in a region compared to national benchmarks. An LQ value greater than 1.0 indicates that a cluster is more concentrated in the region than it is nationally. This is generally regarded as an indication that the region has a comparative advantage relative to a particular cluster, although (especially for local clusters) an LQ below 1.0 can indicate a potential growth opportunity.
- Average annual wage for jobs in Imperial County⁸
- Change in the number of jobs for the most recent 10-year period, 2013-2023

Table 5-2, on page XX, provides the same data for local clusters that had more than 2,000 jobs in the County in 2023. Tables 5-3 through 5-6 provide comparable data for surrounding Riverside and San Diego Counties.

Tables 5-7 and 5-8 summarize cluster job growth/retraction performance in the three counties compared to national trends. This part of the chapter is based on a “shift-share” analysis for each cluster that estimates an “expected” job change based on national trends. If Imperial County (or benchmark region) has higher job growth (or experiences less severe job losses) compared to the expected change, it indicates that the County (or benchmark county) has performed better than national trends. Conversely, if the county has less job growth (or experiences more severe job losses) compared to the expected change, it indicates that the specific county has performed worse than national trends.

⁸ Wage data are for jobs (not residents) based in Imperial County.

TABLE 5-1. SUMMARY CHARACTERISTICS AND TRENDS, IMPERIAL COUNTY'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 100 JOBS IN 2023)

TRADED CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Agricultural Inputs and Services	9,795	11.9	48,467	(753)
Distribution and Electronic Commerce	3,463	0.9	58,000	(417)
Business Services	1,477	0.3	74,996	472
Livestock Processing	1,028	4.2	53,910	(432)
Education and Knowledge Creation	981	0.3	55,598	494
Transportation and Logistics	736	0.7	61,433	73
Electric Power Generation and Transmission	449	5.9	125,232	66
Hospitality and Tourism	424	0.3	31,426	(20)
Construction Products and Services	316	0.7	84,440	(21)
Food Processing and Manufacturing	316	0.6	58,848	(109)
Metal Mining	284	13.1	107,759	126
Marketing, Design, and Publishing	183	0.2	55,637	61
Financial Services	174	0.2	62,292	(218)
Environmental Services	109	1.7	60,908	105
GROUP TOTAL / AVG	19,734	1.07	\$56,478	(573)
COUNTY TOTAL	72,686	N/A	\$51,550	4,690

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-2. SUMMARY CHARACTERISTICS AND TRENDS, IMPERIAL COUNTY'S LARGEST LOCAL CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 2,000 JOBS IN 2022)

LOCAL CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Local Community and Civic Organizations	7,126	2.8	20,155	1,822
Local Education and Training	6,605	1.7	65,056	1,293
Local Government Services	5,560	2.2	63,807	435
Local Health Services	5,315	0.6	63,404	1,125
Local Hospitality Establishments	4,207	0.7	25,414	471
Local Retailing of Clothing and General Merchandise	3,788	1.8	30,166	(252)
Local Real Estate, Construction, and Development	3,428	0.6	55,934	65
Local Food and Beverage Processing and Distribution	3,246	1.0	36,871	977
Local Federal Government Services	3,134	1.5	105,972	210
Local State Government Services	2,961	3.1	60,788	143
Local Motor Vehicle Products and Services	2,436	1.1	45,750	579
Local Personal Services (Non-Medical)	2,357	1.0	32,487	704
Local Commercial Services	2,236	0.5	44,613	(67)
GROUP TOTAL / AVG	52,398	1.13	\$49,573	7,505
COUNTY TOTAL	72,686	N/A	\$51,550	4,690

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-3. SUMMARY CHARACTERISTICS AND TRENDS, RIVERSIDE COUNTY'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 2,000 JOBS IN 2023)

TRADED CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Distribution and Electronic Commerce	87,464	1.8	56,939	45,084
Business Services	24,860	0.4	78,977	4,630
Education and Knowledge Creation	18,108	0.5	61,890	(1,314)
Hospitality and Tourism	17,088	1.0	44,286	2,349
Agricultural Inputs and Services	11,921	1.1	42,194	(1,068)
Transportation and Logistics	9,285	0.7	69,427	3,990
Marketing, Design, and Publishing	6,576	0.6	63,719	1,336
Construction Products and Services	5,788	1.1	79,821	2,772
Food Processing and Manufacturing	5,211	0.7	61,122	2,285
Plastics	4,591	1.2	61,455	1,152
Financial Services	3,674	0.3	100,089	(1,148)
Performing Arts	3,548	0.8	41,553	1,355
Production Technology and Heavy Machinery	2,894	0.5	77,096	68
Downstream Metal Products	2,861	1.1	71,176	852
Information Technology and Analytical Instruments	2,735	0.3	91,601	(538)
Automotive	2,509	0.4	61,361	181
Medical Devices	2,322	1.1	96,632	(1,044)
Recreational and Small Electric Goods	2,278	2.0	48,607	(162)
Furniture	2,159	1.0	58,922	693
Wood Products	2,080	0.9	60,921	397
GROUP TOTAL / AVG	217,951	0.82	\$61,416	61,870
COUNTY TOTAL	931,304	N/A	\$56,244	229,937

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-4. SUMMARY CHARACTERISTICS AND TRENDS, RIVERSIDE COUNTY’S LARGEST LOCAL CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 20,000 JOBS IN 2023)

LOCAL CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Local Real Estate, Construction, and Development	112,927	1.5	65,431	36,097
Local Hospitality Establishments	92,716	1.2	29,490	26,559
Local Health Services	86,521	0.8	72,861	22,601
Local Education and Training	60,422	1.2	68,578	7,350
Local Commercial Services	50,910	0.9	48,055	11,924
Local Community and Civic Organizations	50,714	1.6	25,950	21,889
Local Government Services	48,395	1.6	78,935	5,780
Local Food and Beverage Processing and Distribution	45,677	1.2	48,383	10,346
Local Personal Services (Non-Medical)	34,111	1.2	35,665	8,986
Local Motor Vehicle Products and Services	33,152	1.2	60,089	7,255
Local Retailing of Clothing and General Merchandise	30,226	1.2	32,899	(761)
Local Household Goods and Services	24,546	1.5	45,642	3,072
GROUP TOTAL / AVG	670,314	1.20	\$53,239	161,099
COUNTY TOTAL	931,304	N/A	\$56,244	229,937

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-5. SUMMARY CHARACTERISTICS AND TRENDS, SAN DIEGO COUNTY'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 7,000 JOBS IN 2023)

TRADED CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Business Services	120,330	1.0	113,848	26,340
Education and Knowledge Creation	115,442	1.6	129,106	17,064
Distribution and Electronic Commerce	61,432	0.6	85,392	865
Hospitality and Tourism	50,431	1.5	57,674	3,217
Information Technology and Analytical Instruments	27,109	1.6	153,296	6,383
Marketing, Design, and Publishing	21,197	1.0	101,838	(31)
Financial Services	19,740	0.9	143,516	(1,218)
Aerospace Vehicles and Defense	17,005	2.5	120,117	5,245
Transportation and Logistics	11,552	0.5	69,738	4,552
Agricultural Inputs and Services	10,923	0.6	49,894	72
Communications Equipment and Services	10,531	1.9	147,246	(829)
Insurance Services	9,094	0.6	100,231	(2,153)
Biopharmaceuticals	9,006	2.5	135,173	2,951
Food Processing and Manufacturing	8,610	0.6	55,724	3,589
Performing Arts	8,386	1.1	44,916	2,059
Water Transportation	7,522	2.2	80,366	1,199
Medical Devices	7,392	1.8	115,464	417
Production Technology and Heavy Machinery	7,061	0.7	114,746	(389)
GROUP TOTAL / AVG	522,762	1.06	\$107,320	69,332
COUNTY TOTAL	1,803,858	N/A	\$76,395	221,052

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-6. SUMMARY CHARACTERISTICS AND TRENDS, SAN DIEGO COUNTY’S LARGEST LOCAL CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 40,000 JOBS IN 2023)

LOCAL CLUSTER	JOBS	LQ	AVG ANN WAGE	10-YR JOB CHANGE
Local Health Services	174,289	0.9	81,064	38,638
Local Hospitality Establishments	158,611	1.1	31,238	27,776
Local Real Estate, Construction, and Development	150,217	1.1	76,614	30,715
Local Federal Government Services	138,579	2.7	81,614	(10,265)
Local Commercial Services	112,108	1.1	78,141	12,604
Local Education and Training	83,566	0.9	62,034	5,496
Local Community and Civic Organizations	74,002	1.2	33,598	18,667
Local Food and Beverage Processing and Distribution	66,116	0.9	44,032	5,050
Local Government Services	59,251	1.0	86,979	5,015
Local Personal Services (Non-Medical)	55,364	1.0	40,051	11,118
Local Retailing of Clothing and General Merchandise	45,026	0.9	35,818	(5,727)
Local Motor Vehicle Products and Services	42,248	0.8	59,972	989
GROUP TOTAL / AVG	1,159,378	1.07	\$62,759	140,077
COUNTY TOTAL	1,803,858	N/A	\$76,395	221,052

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

**TABLE 5-7. JOB GROWTH/RETRACTION PERFORMANCE COMPARED TO NATIONAL TRENDS FOR TRADED CLUSTERS,
IMPERIAL COUNTY, RIVERSIDE COUNTY, AND SAN DIEGO COUNTY**

TRADED CLUSTER	2013-23 GROWTH PERFORMANCE BASED ON SHIFT SHARE ANALYSIS		
	IMPERIAL	RIVERSIDE	SAN DIEGO
Aerospace Vehicles and Defense	-	-	+
Agricultural Inputs and Services	-	-	-
Apparel	-	+	+
Automotive	+	-	-
Biopharmaceuticals	N/A	-	+
Business Services	+	-	-
Coal Mining	N/A	-	-
Communications Equipment and Services	-	-	-
Construction Products and Services	-	+	+
Distribution and Electronic Commerce	-	+	-
Downstream Chemical Products	+	+	+
Downstream Metal Products	-	+	-
Education and Knowledge Creation	+	-	+
Electric Power Generation and Transmission	+	+	-
Environmental Services	+	+	+
Financial Services	-	-	-
Fishing and Fishing Products	-	-	+
Food Processing and Manufacturing	-	+	+
Footwear	-	+	-
Forestry	-	-	-
Furniture	-	+	+
Hospitality and Tourism	-	+	+
Information Technology and Analytical Instruments	+	-	-
Insurance Services	+	-	-
Jewelry and Precious Metals	+	+	+
Leather and Related Products	-	+	-
Lighting and Electrical Equipment	N/A	-	-
Livestock Processing	-	+	+
Marketing, Design, and Publishing	+	+	-
Medical Devices	+	-	-
Metal Mining	+	+	+
Metalworking Technology	+	+	+
Music and Sound Recording	-	+	-
Nonmetal Mining	-	+	-
Oil and Gas Production and Transportation	-	+	+
Paper and Packaging	-	-	+
Performing Arts	+	+	-
Plastics	-	+	-

TRADED CLUSTER	2013-23 GROWTH PERFORMANCE BASED ON SHIFT SHARE ANALYSIS		
	IMPERIAL	RIVERSIDE	SAN DIEGO
Printing Services	+	-	+
Production Technology and Heavy Machinery	+	-	-
Recreational and Small Electric Goods	-	-	-
Textile Manufacturing	-	-	-
Tobacco	-	-	+
Trailers, Motor Homes, and Appliances	-	+	-
Transportation and Logistics	-	+	+
Upstream Chemical Products	N/A	+	+
Upstream Metal Manufacturing	-	+	-
Video Production and Distribution	+	+	-
Vulcanized and Fired Materials	+	+	-
Water Transportation	N/A	-	+
Wood Products	+	+	+

Note: " + " = growth performance better than expected; " - " worse than expected.

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

**TABLE 5-8. JOB GROWTH/RETRACTION PERFORMANCE COMPARED TO NATIONAL TRENDS FOR LOCAL CLUSTERS,
IMPERIAL COUNTY, RIVERSIDE COUNTY, AND SAN DIEGO COUNTY**

LOCAL CLUSTER	2013-23 GROWTH PERFORMANCE BASED ON SHIFT SHARE ANALYSIS		
	IMPERIAL	RIVERSIDE	SAN DIEGO
Local Commercial Services	-	+	+
Local Community and Civic Organizations	+	+	+
Local Education and Training	+	+	+
Local Entertainment and Media	+	+	-
Local Federal Government Services	+	+	-
Local Financial Services	-	+	-
Local Food and Beverage Processing and Distribution	+	+	-
Local Government Services	+	+	+
Local Health Services	+	+	+
Local Hospitality Establishments	-	+	+
Local Household Goods and Services	-	+	-
Local Industrial Products and Services	-	-	+
Local Logistical Services	-	+	+
Local Motor Vehicle Products and Services	+	+	-
Local Personal Services (Non-Medical)	+	+	+
Local Real Estate, Construction, and Development	-	+	-
Local Retailing of Clothing and General Merchandise	-	+	-
Local State Government Services	+	+	+
Local Utilities	-	+	-

Note: " + " = growth performance better than expected; " - " worse than expected.

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

“Candidate” Clusters for Imperial County’s Target Industry Program

The following three tables (Tables 5-9 to 5-11) list important existing clusters for the three geographic areas evaluated in this analysis: Imperial, Riverside, and San Diego Counties. For each county, clusters are highlighted/shaded on the table if they are in the top 10 for the entire set of clusters (Traded and Local) for at least one of the three variables:

1. 2023 Location Quotient (LQ)
2. Number of jobs in 2023
3. Job growth between 2013 and 2023

For additional context, the tables also show the average annual wage associated with each cluster.

As an example, in Table 5-9 below, the *Agricultural Inputs and Services* Cluster has the highest LQ (11.9) of all clusters in Imperial County. The 10th highest LQ (1.3) is in the *Local Education and Training* Cluster. The top 10 clusters in terms of LQs are shaded. The same shading pattern is also applied to the top 10 clusters in terms of total jobs and 10-year job change.

TABLE 5-9. TOP 10 CLUSTERS FOR KEY VARIABLES: LQ, JOBS, AND JOB GROWTH, IMPERIAL COUNTY

CLUSTER	LQ	JOBS	10-YR JOB CHANGE	AVG. ANN WAGE
Agricultural Inputs and Services	11.9	9,795	(753)	\$48,467
Business Services	0.3	1,477	472	74,996
Distribution and Electronic Commerce	0.9	3,463	(417)	58,000
Education and Knowledge Creation	0.3	981	494	55,598
Electric Power Generation and Transmission	5.9	449	66	125,232
Environmental Services	1.7	109	105	60,908
Livestock Processing	4.2	1,028	(432)	53,910
Local Community and Civic Organizations*	2.8	7,126	1,822	20,155
Local Education and Training	1.7	6,605	1,293	65,056
Local Food and Beverage Processing and Distribution	1.0	3,246	977	36,871
Local Government Services	2.2	5,560	435	63,807
Local Health Services	0.6	5,315	1,125	63,404
Local Hospitality Establishments	0.7	4,207	471	25,414
Local Motor Vehicle Products and Services	1.1	2,436	579	45,750
Local Personal Services (Non-Medical)	1.0	2,357	704	32,487
Local Real Estate, Construction, and Development	0.6	3,428	65	55,934
Local Retailing of Clothing and General Merchandise	1.8	3,788	(252)	30,166
Local State Government Services	3.1	2,961	143	60,788
Metal Mining	13.1	284	126	107,759

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023.

*Approximately 92% of cluster employment is in one component industry: NAICS 624120 (Services for the Elderly and Persons with Disabilities). In addition, a sizable portion of apparent employment growth in this industry results from the Bureau of Labor Statistics (BLS) reclassification of other industries' employment into this specific industry in 2013.

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-10. TOP 10 CLUSTERS FOR KEY VARIABLES: LQ, JOBS, AND JOB GROWTH, RIVERSIDE COUNTY

CLUSTER	LQ	JOBS	10-YR JOB CHANGE	AVG. ANN WAGE
Distribution and Electronic Commerce	1.8	87,464	45,084	\$56,939
Leather and Related Products	1.3	285	71	51,769
Local Commercial Services	0.9	50,910	11,924	48,055
Local Community and Civic Organizations*	1.6	50,714	21,889	25,950
Local Education and Training	1.2	60,422	7,350	68,578
Local Food and Beverage Processing and Distribution	1.2	45,677	10,346	48,383
Local Government Services	1.6	48,395	5,780	78,935
Local Health Services	0.8	86,521	22,601	72,861
Local Hospitality Establishments	1.2	92,716	26,559	29,490
Local Household Goods and Services	1.5	24,546	3,072	45,642
Local Logistical Services	1.0	18,400	7,634	58,341
Local Personal Services (Non-Medical)	1.2	34,111	8,986	35,665
Local Real Estate, Construction, and Development	1.5	112,927	36,097	65,431
Plastics	1.2	4,591	1,152	61,455
Recreational and Small Electric Goods	2.0	2,278	(162)	48,607

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023.

*Approximately 76% of cluster employment is in one component industry: NAICS 624120 (Services for the Elderly and Persons with Disabilities). In addition, a sizable portion of apparent employment growth in this industry results from the Bureau of Labor Statistics (BLS) reclassification of other industries' employment into this specific industry in 2013.

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-11. TOP 10 CLUSTERS FOR KEY VARIABLES: LQ, JOBS, AND JOB GROWTH, SAN DIEGO COUNTY

CLUSTER	LQ	JOBS	10-YR JOB CHANGE	AVG. ANN WAGE
Aerospace Vehicles and Defense	2.5	17,005	5,245	\$120,117
Biopharmaceuticals	2.5	9,006	2,951	135,173
Business Services	1.0	120,330	26,340	113,848
Communications Equipment and Services	1.9	10,531	(829)	147,246
Education and Knowledge Creation	1.6	115,442	17,064	129,106
Hospitality and Tourism	1.5	50,431	3,217	57,674
Information Technology and Analytical Instruments	1.6	27,109	6,383	153,296
Local Commercial Services	1.1	112,108	12,604	78,141
Local Community and Civic Organizations*	1.2	74,002	18,667	33,598
Local Education and Training	0.9	83,566	5,496	62,034
Local Federal Government Services	2.7	138,579	(10,265)	81,614
Local Food and Beverage Processing and Distribution	0.9	66,116	5,050	44,032
Local Health Services	0.9	174,289	38,638	81,064
Local Hospitality Establishments	1.1	158,611	27,776	31,238
Local Logistical Services	0.7	24,390	7,712	54,854
Local Personal Services (Non-Medical)	1.0	55,364	11,118	40,051
Local Real Estate, Construction, and Development	1.1	150,217	30,715	76,614
Medical Devices	1.8	7,392	417	115,464
Recreational and Small Electric Goods	1.7	3,714	(659)	85,243
Water Transportation	2.2	7,522	1,199	80,366

Note: LQ = Location Quotient; 10-year job change is from 2013 to 2023.

*Approximately 52% of cluster employment is in one component industry: NAICS 624120 (Services for the Elderly and Persons with Disabilities). In addition, a sizable portion of apparent employment growth in this industry results from the Bureau of Labor Statistics (BLS) reclassification of other industries' employment into this specific industry in 2013.

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

Table 5-12, on the following page, provides a list of candidate clusters for Imperial County’s industry targeting program (i.e., business retention, expansion and attraction). The candidate clusters are based on two strategic approaches to industry targeting:

1. **Build on Imperial existing core strengths.** Imperial County’s existing strengths were identified based on the employment-trend criteria (location quotient, total existing jobs, and 10-year job change) summarized in Table 5-9⁹. In addition, the analysis identifies potential “emerging” clusters that have experienced positive growth trends, as identified in the Shift-Share analysis summary on Tables 5-9 and 5-10.
2. **Tap into dominant regional clusters that are not currently well represented in Imperial County.** This strategic approach would seek to leverage Imperial County’s competitive strengths to capture increasing shares of projected employment growth in the surrounding region (Riverside and San Diego Counties). This component of the County’s business attraction/marketing program would focus on Imperial County’s unique “selling points” relative to the larger regional economy (including the County’s strategic location near several Riverside/San Diego County area submarkets, along with a resident workforce that includes large numbers of commuters potentially eager to work closer to home). In developing the list of candidates for the second strategy, the consultant has focused on clusters meeting the following criteria:
 - a. Traded clusters (local clusters are addressed in the first strategic approach)
 - b. Clusters with a high specialization of employment in Riverside and San Diego County’s
 - c. Clusters primarily oriented towards private business investment (in contrast to clusters that are substantially composed of government/nonprofit employment – which are generally considered to have lower economic “spin-off” opportunities)

Table 5-13, on the following page, shows the linkages between the candidate clusters (identified in Table 5-12) and industries/clusters from the following two sources:

1. Target industries identified by the Comprehensive Economic Development Strategy (CEDS) Committee
2. Important industry clusters identified by the Imperial Valley Economic Development Corporation (IVEDC)

Table 5-14, on page XX, provides a narrative description of the candidate clusters. In addition, the table provides key component industries within each cluster based on employment totals for each industry in the relevant geographies.

⁹ Although Table 5-9 would appear to indicate that the *Local Community and Civic Organizations* cluster should be included in the candidate list, we have excluded this cluster for the following reasons. First, about 92% of the employment in this cluster is accounted for in one component industry: NAICS 624120 - Services for the Elderly and Persons with Disabilities; a sizable portion of apparent employment growth in this industry results from the Bureau of Labor Statistics (BLS) reclassification of other industries’ employment into this specific industry in 2013. Second, the County average wage for this cluster (\$20,155) is well below the area average (\$51,550).

On page XX, Table 5-15 summarizes the key characteristics of the candidate clusters identified in Table 5-12. The characteristics include projected 10-year job growth and annual average wages (Imperial County and the State of California).

TABLE 5-12. PRELIMINARY LIST OF POSSIBLE TARGET INDUSTRIES (CLUSTERS) FOR IMPERIAL COUNTY

STRATEGIC APPROACH	LOCAL-SERVING CLUSTERS	"TRADED" CLUSTERS
1. Build on Imperial County's existing dominant strengths and emerging clusters	<ul style="list-style-type: none"> • Local Education and Training • Local Food and Beverage Processing and Distribution • Local Government Services • Local Motor Vehicle Products and Services • Local Personal Services (Non-Medical) 	<ul style="list-style-type: none"> • Agricultural Inputs and Services • Distribution and Electronic Commerce • Electric Power Generation and Transmission • Environmental Services • Metal Mining • Livestock Processing
2. Tap into dominant/emerging regional clusters that are not currently well represented in Imperial County		<ul style="list-style-type: none"> • Education and Knowledge Creation • Plastics • Business Services • Hospitality and Tourism • Aerospace Vehicles and Defense • Construction Products and Services

Source: The Natelson Dale Group, Inc. (TNDG).

TABLE 5-13. CROSS REFERENCE BETWEEN CANDIDATE CLUSTERS AND CLUSTERS/INDUSTRIES IDENTIFIED AT CEDS COMMITTEE MEETING AND IMPERIAL VALLEY EDC TARGETED CLUSTERS

STRATEGIC APPROACH	TARGET INDUSTRIES RECOMMENDED BY CEDS COMMITTEE	IVEDC IMPORTANT INDUSTRY CLUSTERS
Group 1 – Imperial County - Existing Core and Emerging Strengths		
Local Education and Training		
Local Food and Beverage Processing and Distribution	<ul style="list-style-type: none"> • Food processing/manufacturing 	
Local Government Services		
Local Motor Vehicle Products and Services	<ul style="list-style-type: none"> • Retail trade (inc. border-related opportunities) 	
Local Personal Services (Non-Medical)		
Agricultural Inputs and Services		<ul style="list-style-type: none"> • Agribusiness
Distribution and Electronic Commerce	<ul style="list-style-type: none"> • International trade (import/export) • Retail trade (including border-related opportunities) • Logistics/warehousing 	<ul style="list-style-type: none"> • Transportation & Logistics • International Trade
Electric Power Generation and Transmission	<ul style="list-style-type: none"> • Biofuels • Geothermal energy 	<ul style="list-style-type: none"> • Renewable Energy • Biofuels
Environmental Services		<ul style="list-style-type: none"> • Recycling
Metal Mining	<ul style="list-style-type: none"> • Mineral extraction • Battery manufacturing, R&D, and recycling • Automobile manufacturing and R&D 	<ul style="list-style-type: none"> • Mining & Mineral Extraction • Manufacturing
Livestock Processing	<ul style="list-style-type: none"> • Food processing/manufacturing 	<ul style="list-style-type: none"> • Food Processing (Manufacturing)
Group 2 – Imperial County – Dominant/Emerging Regional Clusters		
Education and Knowledge Creation		
Plastics		<ul style="list-style-type: none"> • Manufacturing
Business Services	<ul style="list-style-type: none"> • Data Centers 	<ul style="list-style-type: none"> • Data centers
Hospitality and Tourism		
Aerospace Vehicles and Defense		<ul style="list-style-type: none"> • Aerospace (Manufacturing)
Construction Products and Services		<ul style="list-style-type: none"> • Construction Materials (Manufacturing)

Source: The Natelson Dale Group, Inc. (TNDG); CEDS Committee; Imperial Valley EDC.

TABLE 5-14. NARRATIVE DESCRIPTIONS AND KEY COMPONENT INDUSTRIES FOR PRELIMINARY LIST OF CANDIDATE CLUSTERS

CLUSTER	NARRATIVE DESCRIPTION	KEY COMPONENT INDUSTRIES
Group 1 – Imperial County - Existing Core and Emerging Strengths		
Local Education and Training	Establishments in this cluster include local educational institutions. These include schools for elementary and secondary education, technical and vocational training, fine arts instruction, as well as automobile driving.	<ul style="list-style-type: none"> • Elementary and Secondary Schools (Local Government) • Vocational Rehabilitation Services • Elementary and Secondary Schools
Local Food and Beverage Processing and Distribution	This cluster contains firms that sell food and beverages at the wholesale and retail levels. Products sold include meat, seafood, fruit and vegetables, general groceries, tobacco, alcoholic beverages, and specialty foods. The cluster also includes related distribution methods such as vending and direct selling.	<ul style="list-style-type: none"> • All Other General Merchandise Retailers • Supermarkets and Other Grocery (except Convenience) Stores
Local Government Services	N/A	<ul style="list-style-type: none"> • Local Government, Excluding Education and Hospitals
Local Motor Vehicle Products and Services	Establishments in this cluster consist of local motor vehicle wholesalers and dealers, as well as auto repair services, gas stations, parking lots, car washes, and vehicle towing.	<ul style="list-style-type: none"> • New Car Dealers • Gasoline Stations with Convenience Stores • General Automotive Repair • Automotive Parts and Accessories Retailers
Local Personal Services (Non-Medical)	Establishments in this cluster provide local personal services including self-service laundry, hair care, photofinishing, repair services, and child care. This cluster also contains pet stores and retail stores for certain personal merchandise such as cosmetics.	<ul style="list-style-type: none"> • All Other General Merchandise Retailers • Child Day Care Services • Beauty Salons • Cosmetics, Beauty Supplies, and Perfume Retailers
Agricultural Inputs and Services	This cluster includes establishments primarily engaged in farming and related services. Farming includes soil preparation, planting, cultivation, harvest, fertilizer creation, and post-harvest activities. It also includes services that supply farm labor, support for animal production, and additional operations management.	<ul style="list-style-type: none"> • Crop Production • Postharvest Crop Activities (except Cotton Ginning) • Farm Labor Contractors and Crew Leaders
Distribution and Electronic Commerce	This cluster consists primarily of traditional wholesalers as well as mail order houses and electronic merchants. The companies in this cluster mostly buy, hold, and distribute a wide range of products such as apparel, food, chemicals, gasses, minerals, farm materials, machinery, and other merchandise. The cluster also contains firms that support distribution and electronic commerce operations, including packaging, labeling, and equipment rental and leasing.	<ul style="list-style-type: none"> • Warehouse Clubs and Supercenters • Farm Supplies Merchant Wholesalers • Pharmacies and Drug Retailers • General Warehousing and Storage • Farm and Garden Machinery and Equipment Merchant Wholesalers

CLUSTER	NARRATIVE DESCRIPTION	KEY COMPONENT INDUSTRIES
Electric Power Generation and Transmission	This cluster contains establishments primarily engaged in generating and distributing electric power. This includes power generated from alternative energy sources such as hydroelectric power, nuclear electric power, and solar and wind generated electric power.	<ul style="list-style-type: none"> • Geothermal Electric Power Generation
Environmental Services	This cluster contains establishments primarily engaged in collection, treatment, processing, and disposal of hazardous and non-hazardous waste.	<ul style="list-style-type: none"> • All Other Miscellaneous Waste Management Services
Metal Mining	Establishments in this cluster mine various metals including iron, gold, silver, lead, copper, and uranium. It also includes firms involved in supporting metal mining activities.	<ul style="list-style-type: none"> • Gold Ore and Silver Ore Mining
Livestock Processing	This cluster contains establishments engaged in processing meat from livestock and livestock wholesaling.	<ul style="list-style-type: none"> • Meat Processed from Carcasses • Animal (except Poultry) Slaughtering

Group 2 – Dominant/Emerging Regional Clusters

Education and Knowledge Creation	This cluster contains all educational and training institutions, as well as related supporting establishments. It also includes research and development institutions in biotechnology, physical sciences, engineering, life sciences, and social sciences.	<ul style="list-style-type: none"> • Colleges, Universities, and Professional Schools (State Government) • Colleges, Universities, and Professional Schools (Local Government) • Colleges, Universities, and Professional Schools • Educational Support Services • Exam Preparation and Tutoring • Research and Development in Biotechnology (except Nanobiotechnology) • Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
Plastics	Establishments in this cluster manufacture plastic materials, components, and products. The plastics and foams are manufactured for packaging, pipes, floor coverings, and related plastic products. The cluster also includes the upstream manufacturing of plastic materials and resins, as well as the industrial machines used to manufacture plastics.	<ul style="list-style-type: none"> • All Other Plastics Product Manufacturing • Plastics Pipe and Pipe Fitting Manufacturing • Plastics Plumbing Fixture Manufacturing • Polystyrene Foam Product Manufacturing • Urethane and Other Foam Product (except Polystyrene) Manufacturing • Plastics Bottle Manufacturing
Business Services	Firms in this cluster include establishments and services primarily designed to support other aspects of a business or to assist unrelated companies. This includes corporate headquarters. Professional	<ul style="list-style-type: none"> • Corporate, Subsidiary, and Regional Managing Offices • Engineering Services

CLUSTER	NARRATIVE DESCRIPTION	KEY COMPONENT INDUSTRIES
	<p>services such as consulting, legal services, facilities support services, computer services, engineering and architectural services, and placement services. All for-hire ground passenger transportation services are also present in this cluster.</p>	<ul style="list-style-type: none"> • Administrative Management and General Management Consulting Services • Custom Computer Programming Services • Computer Systems Design Services • Other Scientific and Technical Consulting Services
<p>Hospitality and Tourism</p>	<p>This cluster contains establishments related to hospitality and tourism services and venues. This includes sport venues, casinos, museums, and other attractions. It also includes hotels and other accommodations, transportation, and services related to recreational travel such as reservation services and tour operators.</p>	<ul style="list-style-type: none"> • Hotels (except Casino Hotels) and Motels • Amusement and Theme Parks • All Other Amusement and Recreation Industries • Zoos and Botanical Gardens • Sports Teams and Clubs • All Other Travel Arrangement and Reservation Services
<p>Aerospace Vehicles and Defense</p>	<p>Establishments in this cluster manufacture aircraft, space vehicles, guided missiles, and related parts. This cluster also contains firms that manufacture the necessary search and navigation equipment used by these products.</p>	<ul style="list-style-type: none"> • Aircraft Manufacturing • Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing • Other Aircraft Parts and Auxiliary Equipment Manufacturing
<p>Construction Products and Services</p>	<p>The establishments in this cluster supply construction materials, components, products, and services. Construction materials and components include those made of sand, stone, gravel, asphalt, cement, concrete, and other earthen substances. Construction products include pipes and heat exchangers. Construction services include the construction of pipelines for water, sewers, oil and gas, power, and communication, as well as building services for homes and industrial buildings.</p>	<ul style="list-style-type: none"> • Power and Communication Line and Related Structures Construction • Oil and Gas Pipeline and Related Structures Construction • Other Heavy and Civil Engineering Construction

Source: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE 5-15. CHARACTERISTICS OF CANDIDATE CLUSTERS

CANDIDATE CLUSTER	AVG ANN WAGE ¹	PROJECTED 10-YR JOB GROWTH ²	
		IMPERIAL COUNTY	CA
Imperial Existing/Emerging Clusters			
Local Education and Training	\$65,056	1,336	96,416
Local Food and Beverage Processing and Distribution	36,871	516	3,101
Local Government Services	63,807	744	86,929
Local Motor Vehicle Products and Services	45,750	323	24,904
Local Personal Services (Non-Medical)	32,847	500	94,076
Agricultural Inputs and Services	48,467	(1,658)	27,859
Distribution and Electronic Commerce	58,000	30	57,798
Electric Power Generation and Transmission	125,232	293	3,286
Environmental Services	60,908	50	3,580
Metal Mining	107,759	51	283
Livestock Processing	53,910	261	2,875
Regional Clusters			
Education and Knowledge Creation	102,605	189	112,221
Plastics	71,232	1	46,952
Business Services	149,073	509	211,682
Hospitality and Tourism	64,295	25	63,298
Aerospace Vehicles and Defense	132,746	52	6,501
Construction Products and Services	107,215	18	6,126

Notes: 1. Average compensation for Imperial Existing/Emerging Clusters based on averages for Imperial County. Regional Clusters based on averages for CA.

2. Net number of new jobs.

Source: TNDG; EMSI.

6. Strategic Direction / Action Plan

Relationship of major themes and goals to prior documentation and to current conditions and considerations

Strategic plan goal or topic heading, by broad category	Also addressed in:	Update on how goal/topic relates today
Major Theme A. Public sector operational capacity and readiness		
Goal 1. Establish leadership role for County across multiple strategic objectives: quality of life, collaboration with regional partners, economic development, environmental issues, improved customer service, etc.	C	The size, diversity, dispersal of various activities and population centers, and unique environmental opportunities and challenges, all add to the complexity of management practices in the County, which together require extra efforts to bolster operational efficiency
Goal 2. Address multiple aspects of public sector operational capacity and readiness, including fiscal soundness, critical transportation services, institutionalized economic development, crime, etc.	A	A strong foundation in the goods and services provided by government is critical to support and encourage the multitude of existing activities and emerging initiatives within the private sector
Goal 3. Recognizing that suitable housing is a key component of successful economic development in Imperial County, continue to support local efforts to implement the Housing Element policies aimed at ensuring an adequate supply of workforce, or middle income, housing	A	Although housing is relatively affordable in Imperial County compared to other California regions, availability and, especially, access to reasonably priced housing, is still crucial to maintaining a functioning economy, given the dispersal of the County's population
Goal 4. Adopt a comprehensive approach to supporting and coordinating multiple programs that enhance the region's quality of life	A	Quality-of-life measures cut across many aspects of successful economic development, including appeal of the area for current and potential future employees (and employers), support for tourism, and overall residents' satisfaction
Major Theme B. Infrastructure		
Goal 1. Improve regional mobility	C	Mobility is an especially critical component of a functional economy in Imperial County, from multiple perspectives: border crossings, multiple corridors and modes for through traffic from California to the rest of the US, and internal circulation throughout a large geographic area
Goal 2. Prioritize efforts, and improve and provide services to industrial and commercial sites	A	Various transportation infrastructure improvements in the County tend to increase access to properties, making them more developable once other infrastructure is also made available. Revitalizing areas also require this kind of attention, and project prioritization needs to

Strategic plan goal or topic heading, by broad category	Also addressed in:	Update on how goal/topic relates today
		consider the benefits from improving services to new or revitalizing areas comprehensively
<u>Goal 3.</u> Support long-range transportation plan strategies involving mitigation of bottlenecks, truck safety, etc.	D	Transportation planning also needs to align systems at the local to the national scale, with the added complication of cross-border travel infrastructure and freight modes
<u>Goal 4.</u> Continue to support programs related to the Southern Border Broadband Consortium	A	Broadband services and upgrades are an ongoing challenge for most regions, and the dispersion of employment activity (existing and planned/anticipated) and population throughout Imperial County only complicates this.
Major Theme C. Sustaining existing economy		
<u>Goal 1.</u> Integrate all CEDS programs to promote economic resiliency in Imperial County	A, C, D	[TO BE INCLUDED IN A LATER DRAFT OF THE CEDS]
<u>Goal 2.</u> Strengthen Imperial County’s economy by promoting a balanced, yet diversified, regional economic base	A	The County’s potential for economic growth and diversification cannot be expected to be realized organically, given the complexities of the County as addressed throughout this strategic plan
<u>Goal 3.</u> Promote/support agricultural production and diversification	A	As a core economic activity in Imperial County, agriculture is also important because it particularly susceptible to pressures to evolve in response to climate change and changing environmental regulations and concerns, plus there are potential emerging opportunities for agriculture, and related activities such as food processing, in Imperial County
<u>Goal 4.</u> Promote and expand tourism in Imperial County, to see that visitors’ needs are accommodated, and recognizing tourism’s ties to residents’ quality-of-life and to other industries such as agriculture	A	Visitors’ accommodation and other services in Imperial County can respond to both border-related activity and to the region’s natural and other attractions, plus innovations such as agri-tourism
<u>Goal 5.</u> Sustain and promote expansion of international/ bi-national trade	A	Numerous resources are available for encouraging international trade activities, and the presence of maquiladora industries helps leverage this kind of activity, and vice versa
Major Theme D. Supporting emerging economic opportunities		
<u>Goal 1.</u> Promote Lithium Valley concept – combining geothermal projects and lithium mining	B	Lithium Valley, as a concept and strategic approach, can leverage multiple pathways to economic expansion in Imperial County, in ways that also promote environmentally responsive development and its resulting unique benefits

Strategic plan goal or topic heading, by broad category	Also addressed in:	Update on how goal/topic relates today
<u>Goal 2.</u> Support appropriate and efficient promotional and development efforts related to The CaliBaja Bi-National Mega-Region, as a concept and emerging reality	A	As with Lithium Valley, this concept also promotes expansion of efficient, mutually supportive economic activity in which benefits are shared throughout the binational region
<u>Goal 3.</u> Establish and maintain close coordination between training programs accessible to the Imperial County workforce, and the County's emerging/expanding industries	A	Maintaining close relationships among industry and educational partners is a challenge for every region, so to the extent these kinds of interactions can be institutionalized, the benefits are essentially tripled, shared by employers and employees alike, but also the educational/training institutions themselves

Legend for preceding

- A. Prior CEDS
- B. Imperial County Economic Forecast
- C. County Strategic Plan
- D. Long-Range Transportation Plan

Major themes, goals, and action items

Strategic plan goal or topic heading, by broad category
Major Theme A. Public sector operational capacity and readiness

Goal 1.

Establish leadership role for County across multiple strategic objectives: quality of life, collaboration with regional partners, economic development, environmental issues, improved customer service, etc.

Action Item a.

Develop an internal management plan with a comprehensive focus on coordinating individual agency activities toward a set of mutually reinforcing common objectives, tying job-creation aspects of economic development to foundational frameworks by which industries can be sustained within environmental considerations, enhancing the County's overall appeal to workers through quality-of-life improvements, and similar considerations

Action Item b.

Strategically address how the interrelationships of key assets within the County – water, land, etc. – can be maximized, attention among these assets prioritized, or other means applied so that resources work together in mutually supportive ways

Action Item c.

Strengthen regional partnerships with the intent of ensuring, to the extent possible, unified positions on matters of regional interest, especially those subject to state or federal regulation, funding, etc.

Action Item d.

Promote high-quality customer service, including a business-friendly structure for regulatory measures and operating procedures

Action Item e.

Structure economic development activities to include resources and actions that highlight the County's multiple aspects of having a competitive edge within the broader Southern California/Arizona border region

Action Item f.

Within the economic development function (and perhaps as part of a broader countywide initiative), recognize the need and potential for enhancing inclusion and equity for all citizens, especially those in remote areas and disadvantaged communities, being mindful of the potential leverage economic development activities have in this regard

Goal 2.

Address multiple aspects of public sector operational capacity and readiness, including fiscal soundness, critical transportation services, institutionalized economic development, crime, etc.

Action Item a.

Establish a program to address multiple aspects of expanding retail centers in the County, to maximize capture of retail demand by Mexican nationals: market feasibility at various locations, addressing risk management issues such as peso devaluation, border closures due to pandemics, etc., appropriate incentives, supporting the availability of retail sites, etc.

Action Item b.

Document revenue shortfalls in relation to County programs, review all funding sources, including fees for services, to ensure their potential is maximized, and explore new potential funding opportunities

Action Item c.

Identify and implement efficiency improvements that have the potential to both reduce costs and improve services

Action Item d.

Investigate the fiscal implications of economic development strategic initiatives, including targeted industries and specific actions that affect costs and revenues

Action Item e.

Establish a program for comprehensively reviewing and documenting fiscal conditions and potential remedies related to public facilities/services that are traditionally challenging from a funding standpoint, such as public transportation and healthcare

Goal 3.

Recognizing that suitable housing is a key component of successful economic development in Imperial County, continue to support local efforts to implement the Housing Element policies aimed at ensuring an adequate supply of workforce, or middle income, housing

Action Item a.

Coordinate job-generating activities with community Housing Element and other planning frameworks, to help ensure that housing is available to meet the needs of employees, and also integrated into other community functions

Action Item b.

Support the development of a variety of housing types (apartments, condominiums, cluster housing, etc.), appropriately geographically distributed, to maximize options for working and other households

Action Item c.

Within the context of the preceding housing-related action items, implement policies favorable to housing development, e.g., general and specific plans, zoning, first-time buyer support, etc.

Goal 4.

Adopt a comprehensive approach to supporting and coordinating multiple programs that enhance the region's quality of life

Action Item a.

Working with the Imperial County Transportation Commission's (ICTC) *Regional Active Transportation Plan (ATP)* and relevant local plans, support the development and preservation of alternative transportation and their related recreation opportunities, including multi-use trails, which also can support access to jobs

Action Item b.

Coordinate with Imperial County Parks and Recreation Division and relevant local plans to support the development of sports centers, regional parks, and other recreational facilities, as part of promoting the linkage between quality-of-life and employment opportunities and their locations

Action Item c.

Support arts and cultural activities, in collaboration with local arts organizations, as both a component of enhancing quality-of-life and a critical element of a balanced regional economy, with specific links to tourism

Major Theme B. Infrastructure

Goal 1.

Improve regional mobility

Action Item a.

Support the improvements outlined in the Imperial County Transportation Commission's *Long Range Transportation Plan*, as key foundational components for supporting economic development, from the standpoint of both expanding opportunities (adding to the accessibility of development sites, for example) and increasing the efficiency of business activity in the County

Action Item b.

Support the integration of motorized transportation improvements with alternative, personal transportation modes, as an aspect of a comprehensive approach to enhancing quality-of-life, as noted in a preceding strategy

Action Item c.

Maintain monitoring and coordination efforts with state and federal infrastructure funding programs to maximize intergovernmental project support for Imperial County

Goal 2.

Prioritize efforts, and improve and provide services to industrial and commercial sites

Action Item a.

Coordinate closely with transportation improvement projects that will increase the supply of developable sites, working with utility providers to bring other infrastructure to those locations in a timely and efficient manner

Action Item b.

Coordinate the development of infrastructure needed to maximize the development potential of existing areas (some of which may have been designated for revitalization in various planning documents), including specific underserved properties, working with Capital Improvement Plans and other plans of relevant jurisdictions and utility providers

Goal 3.

Support long-range transportation plan strategies involving mitigation of bottlenecks, truck safety, etc.

Action Item a.

Support the coordination of logistics problems inherent in border areas, generally involving coordination of border crossing infrastructure with other transportation elements, as a critical aspect of supporting economic development through efficient movement of goods

Action Item b.

Support the coordination of transportation planning and improvements from the standpoint of land use compatibility among multiple users, residential neighborhoods, etc. and truck safety, to minimize potential future conflicts

Goal 4.

Continue to support programs related to the Southern Border Broadband Consortium

Action Item a.

Support expansion and quality-upgrade of broadband access, from the standpoint of its multiple benefits related to economic development: business functionality and competitiveness (including broadband's critical role in certain targeted industries), quality-of-life for residents including access to educational/training resources, work-from-home capability for workers, and a wide range of public-sector operations

Action Item b.

Define an appropriate role to work within organizations and programs related to broadband, given the multiple efforts involved, the need for appropriate involvement at the local level, equity aspects of securing broadband access, and similar considerations

Major Theme C. Sustaining existing economy

Goal 1.

**Integrate all CEDS programs to promote economic resiliency in Imperial County
[TO BE INCLUDED IN A LATER DRAFT OF THE CEDS]**

Goal 2.

Strengthen Imperial County's economy by promoting a balanced, yet diversified, regional economic base

Action Item a.

Establish a comprehensive approach to business support in the County through the three pillars of economic development: retention, expansion, and recruitment – designed to achieve overall objectives of continuing to diversify the economy while maximizing industry interrelationships and leveraging emerging opportunities

Action Item b.

Review and select target industries for focused economic development attention, based on research for this Strategic Plan and other considerations, including the potential for selected industries to be mutually supportive and also complement other Strategic Plan initiatives

Action Item c.

Recognizing that access to clean energy can be a particularly attractive proposition for innovative industries, prioritize support for geothermal development, and include collaboration with academic organizations that can receive R&D funding for industry innovation

Action Item d.

Implement coordinated regional marketing and promotional activities, working with regional partners in the US as well as Mexico. Promote unique assets, opportunities, and value proposition of Imperial County

Action Item e.

Investigate the potential for and feasibility of additional financial and other incentives for business expansion and product development, exporting, and nearshoring, given the existence of available programs both locally and through state and federal agencies. If warranted, establish new programs, reinstate prior programs no longer active, coordinate with Go-Biz on developing incentive packages specific for battery manufacturing, and generate materials for marketing all incentives to prospects

Action Item f.

Determine the status of the startup ecosystem in Imperial County – programs specifically to support expansion of small businesses and micro-enterprises, at local and higher levels of government and through public and private funding sources, and support creation of new programs as warranted, recognizing this activity's important role in attraction of talent and overall economic diversification

Action Item g.

Working with existing institutions, increase educational opportunities in the County, including degrees in engineering and other STEM programs

Goal 3.

Promote/support agricultural production and diversification

Action Item a.

Encourage the continued development of agricultural activities by adopting a “cluster” approach, in which the potential for related industries such as food processing, cold storage, transportation services that support shipment of agricultural products, and innovative crop development is promoted through mechanisms that encourage communication and coordination among the variety of entities that are representative of the cluster – with the intent of ensuring that an optimal mix of agriculturally related activities are both present and mutually supportive in terms of operations, locations, etc.

Action Item b.

Develop, support, and market agri-tourism opportunities by conducting outreach to farm operators, organizations such as the Coalition of Labor, Agriculture, and Business (COLAB), Imperial County Farm Bureau, and Imperial Valley Vegetable Growers Association. The initial purpose of the outreach would be to disseminate information about how agri-tourism can fit into other agricultural activities, through functions such as agricultural festivals, on-farm dining events, farm tours, etc. if sufficient interest can be generated, economic development entities can support a consortium of organizations to further advance this concept

Goal 4.

Promote and expand tourism in Imperial County, to see that visitors’ needs are accommodated, and recognizing tourism’s ties to residents’ quality-of-life and to other industries such as agriculture

Action Item a.

Promote tourism within a comprehensive framework that recognizes Imperial County as a gateway for both Americans visiting Mexico, and vice versa, with each group having some different but also complementary objectives (for example, medical tourism in Mexico) and needs and desires – all of which need to be understood in order to maximize the capture of business activity these visitors require. Goods and services provided for tourists also benefit the local population and non-touristic visitors such as business travelers, so the economic development implications are extensive

Action Item b.

Support and initiate as necessary tourism campaigns that promote the County’s amenities and destinations such as the sand dunes, agricultural resources, Fossil Canyon, Painted Gorge, wildlife viewing, etc., and also arts and cultural events could appeal to visitors as well as locals

Action Item c.

Coordinate with private enterprise to encourage development of new businesses that support visitors to Imperial County attractions and at border crossings. As part of this support, consider sponsoring the generation of a high-level investigation into the feasibility of such development, including how the needs of different visitor market segments can be met simultaneously under certain circumstances of location, etc. This investigation could also address possible amendments to land use policies to remove barriers to and otherwise expedite visitor-oriented development

Goal 5.

Sustain and promote expansion of international/bi-national trade

Action Item a.

Increase international awareness of United States/Mexico cross-border opportunities related to NAFTA and the maquiladora industries, by developing bi-national marketing strategies and complementary actions (in coordination with concepts such as The CaliBaja Bi-National Mega-Region) that would also involve strengthening economic trade relationships between Mexico and Imperial County

Action Item b.

Design a comprehensive approach to investigating and monitoring strategies to maximize efficiency of international trade and related activities among the County’s multiple border crossings and their facilities

Major Theme D.

Supporting emerging economic opportunities

Goal 1.

Promote Lithium Valley concept – combining geothermal projects and lithium mining

Action Item a.

Coordinate with other initiatives and documentation related to the Lithium Valley concept, including the Lithium Valley baseline report and other materials related Lithium Valley specific plan, also helping to ensure ongoing consideration of the full range of economic development implications embodied in the initiative

Action Item b.

Adopt a cluster approach (in which the potential for related industries is promoted through mechanisms that encourage communication and coordination among the variety of entities that are representative of the cluster) to maximizing the potential for both lithium production and leveraging that production to increase the attractiveness Imperial County for related industries such as battery manufacturing, being mindful as well of the spectrum of support industries required by the major activities

Action Item c.

Review the need for targeted incentives and the specific roles they can play in furthering the multiple opportunities embodied in Lithium Valley, and structure incentives accordingly

Goal 2.

Support appropriate and efficient promotional and development efforts related to The CaliBaja Bi-National Mega-Region, as a concept and emerging reality

Action Item a.

Determine and adopt an appropriate role for Imperial County within this initiative, considering other entities involved, their potential roles and commitment to the concept, their capacity to support the concept, and similar considerations

Action Item b.

Coordinate other economic development marketing materials with the messages embodied within this initiative, to ensure consistency and to reflect advantages inherent within the CaliBaja Bi-National Mega-Region in communications with relevant prospects generally

Goal 3.

Establish and maintain close coordination between training programs accessible to the Imperial County workforce, and the County's emerging/expanding industries

Action Item a.

Support the job training and education programs represented by the multiple institutions in Imperial County (and adjacent areas as relevant), which are coordinated to some extent through the Local Workforce Development Plan; advocate for expansion of educational/training capabilities as per Goal C-1, Action Item g.

Action Item b.

Ensure that the Workforce Development Plan and other periodically updated training/education program materials remain consistent with current and emerging industry opportunities in Imperial County

Action Item c.

Support the continued operational health of education/training institutions, in part by communicating the vital economic development connection represented by these organizations, and also by helping to coordinate

general and specific industry training needs with these entities – taking advantage of relevant programs available to the state of California

Action Item d.

Continue the offer of providing job training as an incentive to appropriate prospects

Action Item e.

Improve the availability and usefulness of labor force data, especially with respect to occupational skills, in part through enhanced working relationships with the State Employment Development Department, the Workforce Development Board, and local universities and community colleges

Action Item f.

Coordinate with local school districts to enhance overall academic achievement of K-12 students, including students with limited English proficiency

7. Evaluation Framework

This section of the report outlines the metrics that will be utilized to evaluate implementation of the CEDS in future years (in the Annual Performance Reports to be submitted to EDA). The evaluation framework focuses on standard economic performance measures utilizing official government (state and federal) data sources.

In addition to the standardized metrics, specific programmatic accomplishments of the CEDS jurisdictions will be summarized in a separate narrative discussion in each Annual Performance Report.

Statistical Performance Measures

Tables 7-1 through 7-5 below highlight the following key performance measures to be considered in each year's Annual Performance Report:

- One-year **population growth** compared to State benchmarks (2023-2024 data);
- One-year change in nonfarm employment compared to State benchmarks (2023-2024 data);
- One-year and two-year changes in **resident unemployment** rates (2022-2024 data);
- One-year and longer-term (10-year) change in **sales tax revenue** compared to State benchmarks (2013-2023 data);
- Five-year trends for key Census ACS data (cities, county, state, U.S.) (2019-2022 data) for the following measures
 - **Educational attainment**
 - **Labor force participation rate**
 - **Home ownership rate**
 - **Median household and average per capita income levels**

The data on the tables are for the most recent years available and will be utilized as baseline benchmarks in subsequent years (each of the data sources is updated on an annual basis).

[NOTE TO REVIEWERS: THE FOLLOWING TABLES WILL BE COMPLETED IN A LATER DRAFT OF THE CEDS]

Measure	Period	Imperial County Performance Relative to California/U.S. Benchmarks	Economic Favorability Rating
Population growth	2023-2024		
Change in resident unemployment rate	2022-2024		
Growth in sales tax revenue	2023-2024		
Labor force participation	2019-2022		
Home ownership rate	2019-2022		
Median household and average per capita income levels	2019-2022		

**Table 7-1
Total Population by Year
Imperial County Cities and Reference Areas
2023-2024**

Place	2023	2024	% Change 2023-24
Brawley			
Calexico			
Calipatria			
El Centro			
Holtville			
Imperial			
Westmorland			
Imperial County			
California			

Notes:

1. The current year and historical population estimates have been modified to reflect the DOF Estimates as of January 1 for each year. Note that published population estimates from previous years are sometimes changed between updated reports.

Source: California Department of Finance, Table 2: E-5 City/County Population and Housing Estimates, January Years 2023 – 2024

Table 7-2
Total Nonfarm Jobs by Year
Imperial County Cities and Reference Areas
2023-2024

Place	2023	2024	% Change 2023-24
Brawley			
Calexico			
Calipatria			
El Centro			
Holtville			
Imperial			
Westmorland			
Imperial County			
California			
Source: CA EDD Current Employment Statistics (CES) January 2014-2024.			

**Table 7-3a
Resident Unemployment Rates
2022 – 2024
Imperial County Cities**

Date	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	West- morland
May 2022							
May 2023							
May 2024							
2-year change (decrease) in the unemployment rate							
1-year change (decrease) in the unemployment rate							

Notes:
 1. 1 and 2-year changes are percentage point changes.
 2. Unemployment rates are not seasonally adjusted.
 3. Note that published unemployment rates of previous years are sometimes changed between updated reports.
 Sources: United States Bureau of Labor Statistics; California Employment Development Department

Table 7-3b
Resident Unemployment Rates
2022 – 2024
Imperial County, California, U.S.

Date	Imperial County	California	United States
May 2022			
May 2023			
May 2024			
2-year change (decrease) in the unemployment rate			
1-year change (decrease) in the unemployment rate			

Notes:

1. 1 and 2-year changes are percentage point changes.
2. Unemployment rates are not seasonally adjusted.
3. Note that published unemployment rates of previous years are sometimes changed between updated reports.

Sources: United States Bureau of Labor Statistics; California Employment Development Department

Table 7-4
Annual Percentage Change
Total Sales Tax Revenue¹
Imperial County Cities and Reference Areas
Most Recent Year & Past 5 Years

Place	1-Year Change 2022-2023	Average Annual Change, Past 5 Years
Brawley		
Calexico		
Calipatria		
El Centro		
Holtville		
Imperial		
Westmorland		
Imperial County		
California		

Notes:
(1) Underlying data are State distributions of 1% local tax.
(2) Compound Annual Growth Rate
Source: California Department of Tax and Fee Administration (CDTFA)

**Table 7-5a
Comparison of Demographic Trends by Place
% Change 2019 – 2022**

Subject	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	West-morland	Type of Change
Total population								PC
Educational attainment								
High school diploma								PPC
Bachelor’s degree								PPC
Graduate degree								PPC
Labor force participation								PPC
Unemployment rate								PPC
Home ownership rate								PPC
Median household income								PC
Per capita income								PC

Note: The following abbreviations are used for the type of change indicated above: Percentage Change (PC); Percentage Point Change (PPC)

Source: U.S. Census Bureau – American Community Survey (5-year surveys ending in 2019 and 2022).

**Table 7-5b
Comparison of Demographic Trends by Place
% Change 2019 – 2022**

Subject	Imperial County	California	United States	Type of Change
Total population				PC
Educational attainment				
High school diploma				PPC
Bachelor’s degree				PPC
Graduate degree				PPC
Labor force participation				PPC
Unemployment rate				PPC
Home ownership rate				PPC
Median household income				PC
Per capita income				PC

Note: The following abbreviations are used for the type of change indicated above: Percentage Change (PC); Percentage Point Change (PPC)

Source: U.S. Census Bureau – American Community Survey (5-year surveys ending in 2019 and 2022).

8. Candidate CEDS Projects

[TO BE INCLUDED IN A LATER DRAFT OF THE CEDS]

9. Qualifying Census Tracts

The tables in Appendix A provide the latest available Census (ACS) data to identify the individual census tracts within the CEDS area that would potentially qualify for EDA investment based on unemployment rates and per capita income levels. These tables reflect the following qualifying criteria:

- 24-month unemployment rate is at least one percentage point greater than the national average unemployment rate
- Per capita income is not more than 80% of the national average per capita income

CENSUS TRACTS WITHIN IMPERIAL COUNTY

U.S.	Unemployment 5.3%	Per Capita Income \$41,261	24 month unemployment rate is at least 1% point greater than the nat'l average unemployment	The per capita income (PCI) is not more than 80% of the national average PCI.
Census Tract	Unemployment	Per Capita	Qualifying	Qualifying
Census Tract 101.01	0.0%	\$2,252	FALSE	TRUE
Census Tract 101.02	11.1%	\$14,966	TRUE	TRUE
Census Tract 102	16.1%	\$16,599	TRUE	TRUE
Census Tract 103	13.0%	\$29,532	TRUE	TRUE
Census Tract 104.01	61.6%	\$13,455	TRUE	TRUE
Census Tract 104.02	15.4%	\$14,336	TRUE	TRUE
Census Tract 105	9.9%	\$29,900	TRUE	TRUE
Census Tract 106	5.9%	\$35,684	TRUE	FALSE
Census Tract 107	19.9%	\$16,532	TRUE	TRUE
Census Tract 108	0.0%	\$31,076	FALSE	TRUE
Census Tract 109	10.8%	\$22,541	TRUE	TRUE
Census Tract 110.01	15.9%	\$24,357	TRUE	TRUE
Census Tract 110.02	8.1%	\$26,657	TRUE	TRUE
Census Tract 111	12.3%	\$22,663	TRUE	TRUE
Census Tract 112.01	6.2%	\$26,285	TRUE	TRUE
Census Tract 112.02	16.2%	\$13,813	TRUE	TRUE
Census Tract 113.01	0.4%	\$14,538	FALSE	TRUE
Census Tract 113.02	15.2%	\$17,121	TRUE	TRUE
Census Tract 113.03	7.2%	\$20,148	TRUE	TRUE
Census Tract 114	6.9%	\$16,337	TRUE	TRUE
Census Tract 115	18.8%	\$13,325	TRUE	TRUE
Census Tract 116	7.9%	\$23,119	TRUE	TRUE
Census Tract 117	15.8%	\$25,278	TRUE	TRUE
Census Tract 118.01	5.8%	\$37,468	TRUE	FALSE
Census Tract 118.02	7.2%	\$24,858	TRUE	TRUE
Census Tract 118.03	4.2%	\$27,692	FALSE	TRUE
Census Tract 119.01	2.6%	\$34,543	FALSE	FALSE
Census Tract 119.02	13.6%	\$14,334	TRUE	TRUE
Census Tract 119.03	9.0%	\$25,002	TRUE	TRUE

U.S.	Unemployment 5.3%	Per Capita Income \$41,261	24 month unemployment rate is at least 1% point greater than the nat'l average unemployment	The per capita income (PCI) is not more than 80% of the national average PCI.
Census Tract	Unemployment	Per Capita	Qualifying	Qualifying
Census Tract 120.01	21.5%	\$13,786	TRUE	TRUE
Census Tract 120.03	18.5%	\$25,561	TRUE	TRUE
Census Tract 120.04	21.9%	\$21,344	TRUE	TRUE
Census Tract 121.01	23.1%	\$14,793	TRUE	TRUE
Census Tract 121.02	26.7%	\$13,906	TRUE	TRUE
Census Tract 122.01	19.5%	\$18,314	TRUE	TRUE
Census Tract 122.02	18.9%	\$20,538	TRUE	TRUE
Census Tract 123.01	25.0%	\$5,225	TRUE	TRUE
Census Tract 123.02	11.6%	\$19,160	TRUE	TRUE
Census Tract 124	6.9%	\$16,703	TRUE	TRUE
Census Tract 9400	21.0%	\$16,137	TRUE	TRUE

Source: U.S. Census, 2018-2022 American Community Survey 5-Year Estimates.

Appendix A – Census Data

NATIONAL OUTLOOK

U.S.			
Unemployment		Per Capita	
2021	6.30%	2021	\$38,332
2022	4.30%	2022	\$41,804
24 - Month Average	5.30%	24 - Month Average	\$40,068

California			
Unemployment		Per Capita	
2021	8.30%	2021	\$42,396
2022	5.30%	2022	\$46,661
24 - Month Average	6.80%	24 - Month Average	\$43,434

County of Imperial County			
Unemployment		Per Capita	
2021	14.60%	2021	\$19,952
2022	11.70%	2022	\$23,564
24 - Month Average	13.15%	24 - Month Average	\$21,758

Source: U.S. Census, 2021 and 2022 American Community Survey 1-Year Estimates.

INCORPORATED CITIES WITHIN IMPERIAL COUNTY

Name of City	Population
City of Brawley	26,509
City of Calexico	38,599
City of Calipatria	6,579
City of El Centro	44,184
City of Holtville	5,620
City of Imperial	20,430
City of Westmorland	2,010

Source: U.S. Census, 2018-2022 American Community Survey 5-Year Estimates.

INCORPORATED CITIES WITHIN IMPERIAL COUNTY

U.S.					
Population		Unemployment		Per Capita	
2022	331,097,593	2022	5.30%	2022	\$41,261

Brawley					
Population		Unemployment		Per Capita	
2022	26,509	2022	18.20%	2022	\$25,017

Calexico					
Population		Unemployment		Per Capita	
2022	38,599	2022	18.10%	2022	\$19,676

Calipatria					
Population		Unemployment		Per Capita	
2022	6,579	2022	14.50%	2022	\$9,080

El Centro					
Population		Unemployment		Per Capita	
2022	44,184	2022	10.20%	2022	\$22,039

Holtville					
Population		Unemployment		Per Capita	
2022	5,620	2022	11.20%	2022	\$22,444

Imperial					
Population		Unemployment		Per Capita	
2022	20,430	2022	10.70%	2022	\$25,203

Westmorland					
Population		Unemployment		Per Capita	
2022	2,010	2022	20.00%	2022	\$12,474

Source: U.S. Census, 2018-2022 American Community Survey 5-Year Estimates.

CENSUS TRACTS WITHIN IMPERIAL COUNTY

U.S.	Unemployment 5.3%	Per Capita Income \$41,261	24 month unemployment rate is at least 1% point greater than the nat'l average unemployment	The per capita income (PCI) is not more than 80% of the national average PCI.
Census Tract	Unemployment	Per Capita	Qualifying	Qualifying
Census Tract 101.01	0.0%	\$2,252	FALSE	TRUE
Census Tract 101.02	11.1%	\$14,966	TRUE	TRUE
Census Tract 102	16.1%	\$16,599	TRUE	TRUE
Census Tract 103	13.0%	\$29,532	TRUE	TRUE
Census Tract 104.01	61.6%	\$13,455	TRUE	TRUE
Census Tract 104.02	15.4%	\$14,336	TRUE	TRUE
Census Tract 105	9.9%	\$29,900	TRUE	TRUE
Census Tract 106	5.9%	\$35,684	TRUE	FALSE

U.S.	Unemployment 5.3%	Per Capita Income \$41,261	24 month unemployment rate is at least 1% point greater than the nat'l average unemployment	The per capita income (PCI) is not more than 80% of the national average PCI.
Census Tract	Unemployment	Per Capita	Qualifying	Qualifying
Census Tract 107	19.9%	\$16,532	TRUE	TRUE
Census Tract 108	0.0%	\$31,076	FALSE	TRUE
Census Tract 109	10.8%	\$22,541	TRUE	TRUE
Census Tract 110.01	15.9%	\$24,357	TRUE	TRUE
Census Tract 110.02	8.1%	\$26,657	TRUE	TRUE
Census Tract 111	12.3%	\$22,663	TRUE	TRUE
Census Tract 112.01	6.2%	\$26,285	TRUE	TRUE
Census Tract 112.02	16.2%	\$13,813	TRUE	TRUE
Census Tract 113.01	0.4%	\$14,538	FALSE	TRUE
Census Tract 113.02	15.2%	\$17,121	TRUE	TRUE
Census Tract 113.03	7.2%	\$20,148	TRUE	TRUE
Census Tract 114	6.9%	\$16,337	TRUE	TRUE
Census Tract 115	18.8%	\$13,325	TRUE	TRUE
Census Tract 116	7.9%	\$23,119	TRUE	TRUE
Census Tract 117	15.8%	\$25,278	TRUE	TRUE
Census Tract 118.01	5.8%	\$37,468	TRUE	FALSE
Census Tract 118.02	7.2%	\$24,858	TRUE	TRUE
Census Tract 118.03	4.2%	\$27,692	FALSE	TRUE
Census Tract 119.01	2.6%	\$34,543	FALSE	FALSE
Census Tract 119.02	13.6%	\$14,334	TRUE	TRUE
Census Tract 119.03	9.0%	\$25,002	TRUE	TRUE
Census Tract 120.01	21.5%	\$13,786	TRUE	TRUE
Census Tract 120.03	18.5%	\$25,561	TRUE	TRUE
Census Tract 120.04	21.9%	\$21,344	TRUE	TRUE
Census Tract 121.01	23.1%	\$14,793	TRUE	TRUE
Census Tract 121.02	26.7%	\$13,906	TRUE	TRUE
Census Tract 122.01	19.5%	\$18,314	TRUE	TRUE
Census Tract 122.02	18.9%	\$20,538	TRUE	TRUE
Census Tract 123.01	25.0%	\$5,225	TRUE	TRUE
Census Tract 123.02	11.6%	\$19,160	TRUE	TRUE
Census Tract 124	6.9%	\$16,703	TRUE	TRUE
Census Tract 9400	21.0%	\$16,137	TRUE	TRUE

Source: U.S. Census, 2018-2022 American Community Survey 5-Year Estimates.

Appendix B – Demographic and Economic Data for Imperial
County and Cities

TABLE 1. POPULATION AND HOUSING ESTIMATES, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY, 4/2010

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Brawley	4/2010	24,953	24,779	174	8,231	5,368	220	728	1,500	415	7,623	7.4%	3.25
Calexico	4/2010	38,572	38,472	100	10,651	7,292	486	1,158	1,545	170	10,116	5.0%	3.80
Calipatria	4/2010	7,705	3,541	4,164	1,121	859	16	44	141	61	1,008	10.1%	3.51
El Centro	4/2010	42,598	41,782	816	14,476	8,086	427	1,577	2,855	1,531	13,108	9.5%	3.19
Holtville	4/2010	5,939	5,939	0	1,937	1,278	73	177	203	206	1,799	7.1%	3.30
Imperial	4/2010	14,758	14,727	31	4,751	3,427	389	401	464	70	4,405	7.3%	3.34
Westmorland	4/2010	2,225	2,225	0	678	465	10	100	83	20	631	6.9%	3.53
Imperial County	4/2010	174,528	163,844	10,684	56,067	34,576	1,911	4,775	7,173	7,632	49,126	12.4%	3.34

Source: CA Department of Finance (DOF); TNDG.

TABLE 2. POPULATION AND HOUSING ESTIMATES, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, ARIZONA, AND CALIFORNIA, 4/2010

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Imperial County	4/2010	174,528	163,844	10,684	56,067	34,576	1,911	4,775	7,173	7,632	49,126	12.4%	3.34
Riverside County	4/2010	2,189,641	2,153,812	35,829	800,707	543,209	50,784	38,409	89,577	78,728	686,260	14.3%	3.14
San Diego County	4/2010	3,095,313	2,991,515	103,798	1,164,028	603,441	104,163	84,621	326,037	45,766	1,086,113	6.7%	2.75
Yuma County*	1/2010	195,490	-	-	-	-	-	-	-	-	-	-	-
Arizona*	1/2010	6,398,985	-	-	-	-	-	-	-	-	-	-	-
California	4/2010	37,253,956	36,412,191	841,765	13,670,304	7,959,078	966,440	1,110,620	3,076,519	557,647	12,568,167	8.1%	2.90

* Note that most recent population estimates for Yuma County and the State of Arizona are only available for July, 2023.

Source: CA DOF; AZ Office of Economic Opportunity (OEO); TNDG.

TABLE 3. POPULATION AND HOUSING ESTIMATES, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY, 4/2020

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Brawley	4/2020	26,492	26,332	160	8,597	5,649	226	727	1,639	356	8,233	4.2%	3.20
Calexico	4/2020	38,710	38,618	92	10,815	7,325	521	1,160	1,647	162	10,468	3.2%	3.69
Calipatria	4/2020	6,534	3,629	2,905	1,116	858	17	43	140	58	1,034	7.3%	3.51
El Centro	4/2020	44,808	44,015	793	15,041	8,411	454	1,588	3,091	1,497	14,137	6.0%	3.11
Holtville	4/2020	5,528	5,528	0	1,793	1,192	81	157	185	178	1,709	4.7%	3.23
Imperial	4/2020	20,320	20,290	30	6,214	4,730	398	388	632	66	6,029	3.0%	3.37
Westmorland	4/2020	2,020	2,020	0	655	452	10	95	80	18	631	3.7%	3.20
Imperial County	4/2020	179,702	171,756	7,946	56,625	35,488	1,973	4,669	7,745	6,750	52,050	8.1%	3.30

Source: CA Department of Finance (DOF); TNDG.

TABLE 4. POPULATION AND HOUSING ESTIMATES, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, ARIZONA, AND CALIFORNIA, 4/2020

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Imperial County	4/2020	179,702	171,756	7,946	56,625	35,488	1,973	4,669	7,745	6,750	52,050	8.1%	3.30
Riverside County	4/2020	2,418,185	2,378,131	40,054	848,549	584,462	53,296	37,857	97,141	75,793	763,283	10.0%	3.12
San Diego County	4/2020	3,298,634	3,181,000	117,634	1,228,505	624,217	109,848	85,883	364,211	44,346	1,158,764	5.7%	2.75
Yuma County*	1/2020	204,722	-	-	-	-	-	-	-	-	-	-	-
Arizona*	1/2020	7,176,401	-	-	-	-	-	-	-	-	-	-	-
California	4/2020	39,538,223	38,577,071	961,152	14,392,140	8,287,543	1,035,154	1,123,425	3,412,229	533,789	13,475,623	6.4%	2.86

* Note that most recent population estimates for Yuma County and the State of Arizona are only available for July, 2023.

Source: CA DOF; AZ OEO; TNDG.

TABLE 5. POPULATION AND HOUSING ESTIMATES, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY, 1/2024

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Brawley	1/2024	28,345	28,185	160	9,352	6,196	231	745	1,824	356	8,956	4.2%	3.15
Calexico	1/2024	39,262	39,170	92	11,148	7,395	571	1,214	1,805	163	10,791	3.2%	3.63
Calipatria	1/2024	6,342	3,601	2,741	1,128	870	17	43	140	58	1,045	7.4%	3.45
El Centro	1/2024	44,952	44,159	793	15,335	8,424	469	1,600	3,319	1,523	14,415	6.0%	3.06
Holtville	1/2024	5,583	5,583	0	1,840	1,192	81	161	229	177	1,754	4.7%	3.18
Imperial	1/2024	22,141	22,111	30	6,882	5,205	472	388	751	66	6,676	3.0%	3.31
Westmorland	1/2024	2,050	2,050	0	676	473	10	95	80	18	652	3.6%	3.14
Imperial County	1/2024	182,881	175,833	7,048	58,851	36,659	2,137	4,769	8,479	6,807	54,171	8.0%	3.25

Source: CA Department of Finance (DOF); TNDG.

TABLE 6. POPULATION AND HOUSING ESTIMATES, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, ARIZONA, AND CALIFORNIA, 1/2024

City	Date	POPULATION			HOUSING UNITS							Vacancy Rate	Persons per Household
		Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied		
Imperial County	1/2024	182,881	175,833	7,048	58,851	36,659	2,137	4,769	8,479	6,807	54,171	8.0%	3.25
Riverside County	1/2024	2,442,378	2,402,130	40,248	882,389	611,115	54,825	38,559	100,194	77,696	793,543	10.1%	3.03
San Diego County	1/2024	3,291,101	3,175,965	115,136	1,266,919	634,671	112,816	88,192	386,523	44,717	1,196,091	5.6%	2.66
Yuma County*	7/2023	214,264	-	-	-	-	-	-	-	-	-	-	-
Arizona*	7/2023	7,525,113	-	-	-	-	-	-	-	-	-	-	-
California	1/2024	39,128,162	38,201,264	926,898	14,824,827	8,471,490	1,069,749	1,149,409	3,594,764	539,415	13,880,371	6.4%	2.75

* Note that most recent population estimates for Yuma County and the State of Arizona are only available for July, 2023.

Source: CA DOF; AZ OEO; TNDG.

TABLE 7. SELECTED ECONOMIC CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
EMPLOYMENT STATUS								
Population 16 years and over								
Labor Force Participation Rate	56.0%	54.4%	22.9%	58.0%	50.8%	58.5%	46.5%	52.3%
Employment/Population Ratio	45.7%	44.5%	19.6%	52.1%	45.1%	52.1%	37.2%	45.2%
Unemployment Rate	18.2%	18.1%	14.5%	10.2%	11.2%	10.7%	20.0%	13.2%
Labor Force Participation Rate by Educational Attainment								
Population 25 to 64 years	72.0%	75.4%	22.9%	74.3%	71.7%	75.8%	66.7%	67.6%
Less than high school graduate	52.7%	68.7%	12.0%	61.5%	53.8%	33.7%	68.5%	50.5%
High school graduate (includes equivalency)	73.5%	70.7%	28.0%	71.0%	75.8%	70.5%	51.0%	64.8%
Some college or Associates Degree	73.1%	82.4%	31.0%	77.7%	82.8%	83.5%	87.2%	73.7%
Bachelor's degree of higher	91.7%	78.0%	47.2%	87.8%	82.2%	96.1%	51.7%	83.2%
Employment/Population Ratio by Educational Attainment								
Population 25 to 64 years	61.6%	62.5%	19.8%	67.4%	65.5%	69.3%	52.8%	59.5%
Less than high school graduate	37.5%	50.6%	9.9%	53.2%	53.8%	29.8%	48.4%	40.7%
High school graduate (includes equivalency)	59.4%	62.9%	23.8%	66.1%	61.1%	63.5%	43.2%	57.5%
Some college or Associates Degree	68.9%	67.9%	27.6%	68.6%	79.8%	75.8%	74.4%	65.9%
Bachelor's degree of higher	77.5%	68.4%	47.2%	83.7%	77.7%	89.9%	44.8%	75.7%
Unemployment Rate by Educational Attainment								
Population 25 to 64 years	14.3%	17.1%	13.6%	9.1%	8.6%	8.7%	20.8%	11.6%
Less than high school graduate	28.7%	26.3%	17.3%	13.4%	0.0%	11.5%	29.3%	19.3%
High school graduate (includes equivalency)	19.2%	11.1%	15.0%	7.0%	19.4%	9.8%	15.3%	11.1%
Some college or Associates Degree	4.9%	17.3%	11.0%	11.4%	3.6%	9.2%	14.7%	9.9%
Bachelor's degree of higher	15.5%	12.3%	0.0%	4.6%	5.4%	6.4%	13.3%	8.9%
COMMUTING TO WORK								
Workers 16 years and over								
Car, truck, or van -- drove alone	76.5%	77.9%	89.5%	79.1%	85.3%	80.6%	79.7%	79.6%
Car, truck, or van -- carpooled	7.3%	6.3%	4.9%	12.7%	12.5%	9.2%	4.1%	8.7%
Public transportation (excluding taxicab)	0.3%	2.4%	0.0%	0.4%	0.0%	0.0%	2.2%	0.7%
Walked	2.2%	3.9%	3.1%	1.7%	0.0%	3.6%	6.8%	3.0%
Other means	5.3%	1.8%	1.3%	1.7%	1.5%	0.5%	0.0%	2.1%
Worked at home	8.4%	7.6%	1.2%	4.4%	0.8%	6.0%	7.2%	5.9%
Mean travel time to work (minutes)	21.5	26.9	14.9	21.6	29.8	18.1	19.9	22.7
OCCUPATION								
Civilian employed population 16 years and over								

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
Management, business, science, and arts occupations	25.9%	24.9%	9.2%	26.7%	16.8%	31.6%	20.2%	25.0%
Service occupations	25.0%	28.0%	17.3%	26.1%	16.7%	30.9%	17.9%	27.0%
Sales and office occupations	19.5%	20.8%	20.6%	17.9%	19.3%	23.2%	14.1%	19.7%
Natural resources, construction, and maintenance occupations	15.5%	13.7%	30.6%	13.4%	23.2%	9.0%	35.5%	15.2%
Production, transportation, and material moving occupations	14.0%	12.5%	22.4%	15.9%	24.0%	5.2%	12.4%	13.0%
INDUSTRY								
Civilian employed population 16 years and over								
Agriculture, forestry, fishing and hunting, and mining	10.9%	8.5%	29.8%	7.7%	20.5%	2.6%	33.2%	9.8%
Construction	4.3%	6.1%	5.3%	6.4%	11.6%	4.1%	4.8%	6.2%
Manufacturing	2.7%	4.6%	11.4%	3.6%	0.5%	3.1%	1.3%	3.8%
Wholesale trade	4.2%	2.4%	3.1%	2.2%	14.3%	2.9%	0.0%	2.9%
Retail trade	9.6%	15.5%	9.3%	12.6%	4.3%	10.9%	17.0%	12.0%
Transportation and warehousing, and utilities	8.1%	7.2%	3.2%	6.3%	9.3%	6.4%	0.6%	6.7%
Information	0.8%	0.4%	0.0%	1.1%	0.0%	0.6%	1.3%	0.7%
Finance and insurance, & real estate & rental & leasing	3.2%	3.2%	0.0%	2.8%	0.7%	5.8%	1.5%	3.2%
Professional, scientific, & mgmt, & admin & waste mgmt srvc	8.8%	8.2%	10.4%	4.8%	5.0%	8.8%	8.2%	7.3%
Educational services, & health care & social assistance	22.2%	24.4%	16.1%	28.4%	14.5%	22.9%	18.5%	23.2%
Arts, entertainment, & recreation, & accommodation & food srvc	7.1%	7.9%	3.6%	8.5%	4.6%	13.6%	5.7%	9.4%
Other services, except public administration	2.4%	3.4%	3.9%	5.0%	1.5%	4.4%	2.1%	4.1%
Public administration	15.7%	8.3%	3.9%	10.8%	13.3%	14.1%	5.9%	10.7%
CLASS OF WORKER								
Civilian employed population 16 years and over								
Private wage and salary workers	65.8%	69.9%	77.1%	67.1%	71.6%	62.8%	83.8%	68.8%
Government workers	28.0%	23.5%	18.6%	25.8%	22.3%	31.6%	13.9%	24.7%
Self-employed in own not incorporated business workers	5.9%	6.3%	4.4%	7.1%	6.0%	4.7%	2.3%	6.1%
Unpaid family workers	0.3%	0.3%	0.0%	0.0%	0.0%	0.8%	0.0%	0.3%
INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)								
Total households								
Less than \$10,000	8.4%	6.0%	12.9%	6.4%	9.2%	3.1%	17.9%	7.4%
\$10,000 to \$14,999	4.9%	6.4%	9.4%	6.1%	2.0%	1.6%	7.0%	5.2%
\$15,000 to \$24,999	10.0%	14.6%	7.5%	10.7%	23.8%	8.3%	15.4%	12.5%
\$25,000 to \$34,999	11.3%	8.2%	10.3%	8.3%	6.4%	2.2%	13.6%	8.8%
\$35,000 to \$49,999	11.1%	14.0%	15.9%	14.9%	9.1%	14.7%	19.7%	13.3%
\$50,000 to \$74,999	13.4%	15.1%	27.3%	16.5%	13.3%	12.5%	7.2%	15.2%
\$75,000 to \$99,999	7.8%	10.3%	8.2%	12.1%	11.2%	19.9%	5.3%	11.1%

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
\$100,000 to \$149,999	23.0%	14.9%	8.6%	16.0%	15.1%	25.7%	7.0%	17.2%
\$150,000 to \$199,999	3.7%	5.6%	0.0%	4.5%	4.5%	3.7%	7.0%	4.3%
\$200,000 or more	6.4%	4.9%	0.0%	4.5%	5.5%	8.3%	0.0%	5.0%
Median household income (dollars)	\$56,229	\$51,667	\$43,095	\$54,922	\$44,939	\$83,029	\$31,827	\$53,847
Mean household income (dollars)	\$79,848	\$71,093	\$45,751	\$73,280	\$68,505	\$93,310	\$46,012	\$72,923
With earnings								
Mean earnings (dollars)	\$85,373	\$69,656	\$46,763	\$73,912	\$72,788	\$94,832	\$52,792	\$74,860
With Social Security								
Mean Social Security income (dollars)	\$18,266	\$16,839	\$15,290	\$16,727	\$16,150	\$21,034	\$18,262	\$18,233
With retirement income								
Mean retirement income (dollars)	\$28,987	\$28,538	\$16,368	\$29,527	\$16,652	\$28,674	\$15,647	\$28,121
With Supplemental Security Income								
Mean Supplemental Security Income (dollars)	\$7,731	\$8,932	-	\$9,111	\$5,493	\$9,437	\$6,760	\$8,846
With cash public assistance income								
Mean cash public assistance income (dollars)	\$4,535	\$5,901	-	\$4,959	\$2,988	\$8,278	\$8,798	\$5,739
Families								
Less than \$10,000	8.8%	5.5%	2.2%	5.9%	4.7%	2.6%	31.2%	6.5%
\$10,000 to \$14,999	1.7%	3.7%	8.7%	3.5%	0.0%	0.9%	1.9%	2.8%
\$15,000 to \$24,999	9.7%	9.8%	6.4%	9.2%	19.9%	8.6%	6.8%	9.6%
\$25,000 to \$34,999	10.7%	8.6%	12.9%	9.9%	8.2%	3.0%	14.8%	8.9%
\$35,000 to \$49,999	11.4%	16.0%	10.6%	15.7%	9.0%	11.8%	14.2%	13.9%
\$50,000 to \$74,999	15.8%	14.6%	37.6%	16.6%	16.1%	10.1%	7.7%	16.1%
\$75,000 to \$99,999	8.9%	10.5%	9.6%	12.1%	14.5%	17.4%	8.8%	11.6%
\$100,000 to \$149,999	20.7%	18.4%	11.9%	17.2%	15.7%	31.6%	9.9%	19.4%
\$150,000 to \$199,999	4.5%	6.8%	0.0%	5.3%	6.3%	3.3%	4.7%	5.1%
\$200,000 or more	7.7%	5.8%	0.0%	4.6%	5.5%	10.7%	0.0%	6.0%
Median family income (dollars)	\$62,160	\$59,907	\$51,314	\$56,657	\$61,056	\$94,163	\$31,458	\$60,776
Mean family income (dollars)	\$83,045	\$79,978	\$55,170	\$77,314	\$77,825	\$100,121	\$44,293	\$80,038
Per capita income (dollars)	\$25,017	\$19,676	\$9,080	\$22,039	\$22,444	\$25,203	\$12,474	\$21,216
Nonfamily households								
Median nonfamily income (dollars)	\$42,905	\$17,734	-	\$31,719	\$16,992	\$53,220	\$15,921	\$27,159
Mean nonfamily income (dollars)	\$65,988	\$34,915	\$20,180	\$49,591	\$38,097	\$57,213	\$27,405	\$45,226
Median earnings for workers (dollars)	\$34,155	\$26,001	\$28,772	\$29,178	\$32,756	\$45,818	\$28,580	\$30,547
Median earnings for male full-time, year-round workers (dollars)	\$69,051	\$58,069	\$34,496	\$47,124	\$46,636	\$71,970	\$32,083	\$53,208
Median earnings for female full-time, year-round workers (dollars)	\$48,281	\$40,060	\$33,429	\$41,867	\$56,558	\$57,750	\$71,250	\$42,221

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
HEALTH INSURANCE COVERAGE								
Civilian noninstitutionalized population								
With health insurance coverage	94.2%	92.7%	93.4%	94.3%	91.2%	94.6%	95.8%	93.2%
With private health insurance	44.6%	36.9%	33.4%	44.3%	40.2%	59.2%	26.9%	43.4%
With public coverage	56.5%	61.8%	65.1%	59.5%	58.0%	41.8%	75.2%	57.1%
No health insurance coverage	5.8%	7.3%	6.6%	5.7%	8.8%	5.4%	4.2%	6.8%
Civilian noninstitutionalized population under 19 years								
No health insurance coverage	1.3%	2.5%	0.0%	1.5%	0.0%	3.1%	0.0%	2.5%
Civilian noninstitutionalized population 19 to 64 years								
In labor force:								
Employed:								
With health insurance coverage	92.3%	89.5%	88.3%	91.4%	84.1%	96.2%	96.0%	90.5%
With private health insurance	68.6%	56.7%	61.0%	63.4%	57.8%	80.2%	41.1%	63.1%
With public coverage	28.0%	35.8%	29.0%	33.5%	28.7%	19.0%	59.4%	31.3%
No health insurance coverage	7.7%	10.5%	11.7%	8.6%	15.9%	3.8%	4.0%	9.5%
Unemployed:								
With health insurance coverage	89.4%	83.3%	100.0%	83.1%	73.3%	83.5%	91.6%	84.8%
With private health insurance	9.5%	18.7%	29.6%	15.9%	38.9%	28.3%	13.4%	18.9%
With public coverage	79.9%	66.5%	70.4%	70.1%	34.4%	55.2%	78.2%	67.5%
No health insurance coverage	10.6%	16.7%	0.0%	16.9%	26.7%	16.5%	8.4%	15.2%
Not in labor force:								
With health insurance coverage	88.1%	88.0%	84.6%	90.0%	86.7%	84.0%	84.1%	87.7%
With private health insurance	25.8%	31.1%	18.2%	32.1%	30.0%	45.5%	15.6%	30.8%
With public coverage	64.0%	59.4%	68.2%	65.4%	57.9%	41.9%	71.0%	60.4%
No health insurance coverage	11.9%	12.0%	15.4%	10.0%	13.3%	16.0%	15.9%	12.3%
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL								
All families	20.7%	19.3%	17.3%	17.8%	21.9%	9.2%	43.3%	18.1%
With related children of the householder under 18 years	29.3%	26.4%	27.2%	24.1%	17.3%	8.5%	55.7%	24.3%
With related children of the householder under 5 years only	29.4%	25.5%	0.0%	35.5%	0.0%	6.4%	34.2%	28.5%
Married couple families	10.0%	9.8%	0.0%	11.9%	15.5%	5.6%	21.7%	10.4%
With related children of the householder under 18 years	15.9%	13.0%	0.0%	15.0%	0.0%	1.3%	11.8%	12.4%
With related children of the householder under 5 years only	14.2%	23.0%	0.0%	17.8%	0.0%	0.0%	0.0%	16.5%
Families with female householder, no husband present	42.9%	42.6%	51.5%	36.6%	28.6%	20.4%	78.0%	38.6%
With related children of the householder under 18 years	53.5%	55.1%	65.1%	44.0%	60.9%	21.1%	80.5%	48.0%
With related children of the householder under 5 years only	53.6%	38.4%	-	59.0%	-	13.6%	100.0%	50.2%

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
All people	23.6%	22.6%	28.6%	21.1%	23.7%	11.1%	48.6%	21.1%
Under 18 years	31.9%	31.6%	41.1%	29.4%	25.7%	10.1%	61.1%	28.0%
Related children of the householder under 18 years	31.9%	31.4%	41.1%	29.3%	25.7%	9.2%	60.0%	27.8%
Related children of the householder under 5 years	28.4%	36.5%	60.4%	34.3%	2.3%	13.2%	67.7%	31.7%
Related children of the householder 5 to 17 years	33.4%	29.7%	35.7%	28.0%	33.0%	7.6%	55.6%	26.4%
18 years and over	20.0%	19.0%	23.1%	17.6%	23.0%	11.6%	41.6%	18.1%
18 to 64 years	20.1%	18.7%	23.7%	17.2%	18.6%	10.3%	43.8%	17.9%
65 years and over	19.7%	20.2%	20.5%	19.1%	38.5%	19.7%	33.2%	19.4%
People in families	22.7%	21.5%	24.0%	19.6%	22.5%	10.4%	50.2%	19.7%
Unrelated individuals 15 years and over	30.4%	33.9%	63.8%	33.6%	34.3%	17.5%	40.6%	31.9%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

TABLE 8. SELECTED ECONOMIC CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
EMPLOYMENT STATUS						
Population 16 years and over						
Labor Force Participation Rate	52.3%	60.7%	66.2%	53.9%	60.5%	63.8%
Employment/Population Ratio	45.2%	56.4%	59.0%	47.1%	56.9%	59.3%
Unemployment Rate	13.2%	6.7%	6.3%	8.3%	5.4%	6.4%
Labor Force Participation Rate by Educational Attainment						
Population 25 to 64 years	67.6%	75.6%	80.5%	72.6%	76.6%	78.5%
Less than high school graduate	50.5%	64.0%	67.5%	61.1%	61.5%	65.6%
High school graduate (includes equivalency)	64.8%	74.2%	74.8%	69.4%	71.4%	73.2%
Some college or Associates Degree	73.7%	77.1%	79.4%	76.5%	77.5%	78.7%
Bachelor's degree of higher	83.2%	83.5%	87.0%	84.0%	84.9%	86.6%
Employment/Population Ratio by Educational Attainment						
Population 25 to 64 years	59.5%	71.1%	73.7%	65.6%	72.8%	73.8%
Less than high school graduate	40.7%	59.1%	61.8%	53.8%	57.1%	60.6%
High school graduate (includes equivalency)	57.5%	69.4%	67.2%	61.7%	66.9%	67.8%
Some college or Associates Degree	65.9%	72.2%	70.9%	69.7%	73.5%	73.2%
Bachelor's degree of higher	75.7%	80.0%	81.4%	77.8%	82.2%	82.8%
Unemployment Rate by Educational Attainment						
Population 25 to 64 years	11.6%	5.5%	5.4%	7.0%	4.4%	5.5%
Less than high school graduate	19.3%	7.6%	8.3%	12.0%	7.2%	7.5%

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
High school graduate (includes equivalency)	11.1%	6.1%	6.9%	8.5%	6.0%	6.9%
Some college or Associates Degree	9.9%	5.7%	5.9%	4.8%	4.5%	6.1%
Bachelor's degree of higher	8.9%	3.6%	3.9%	4.2%	2.7%	3.9%
COMMUTING TO WORK						
Workers 16 years and over						
Car, truck, or van -- drove alone	79.6%	75.9%	69.4%	78.2%	70.5%	68.4%
Car, truck, or van -- carpooled	8.7%	11.3%	8.5%	12.2%	10.0%	9.5%
Public transportation (excluding taxicab)	0.7%	0.8%	2.2%	0.8%	1.2%	3.6%
Walked	3.0%	1.2%	2.9%	1.5%	1.7%	2.4%
Other means	2.1%	1.5%	2.1%	1.4%	2.4%	2.4%
Worked at home	5.9%	9.3%	14.9%	5.9%	14.3%	13.6%
Mean travel time to work (minutes)	23.7	33.8	26.1	20.8	25.5	29.2
OCCUPATION						
Civilian employed population 16 years and over						
Management, business, science, and arts occupations	25.0%	32.0%	45.4%	27.1%	39.4%	41.7%
Service occupations	27.0%	19.9%	17.9%	21.4%	17.7%	17.6%
Sales and office occupations	19.7%	22.1%	19.6%	20.1%	22.9%	20.0%
Natural resources, construction, and maintenance occupations	15.2%	11.2%	7.2%	15.6%	9.0%	8.8%
Production, transportation, and material moving occupations	13.0%	15.0%	9.8%	15.8%	11.0%	11.9%
INDUSTRY						
Civilian employed population 16 years and over						
Agriculture, forestry, fishing and hunting, and mining	9.8%	1.3%	0.7%	10.1%	1.3%	2.1%
Construction	6.2%	9.5%	6.5%	5.9%	7.5%	6.7%
Manufacturing	3.8%	8.2%	9.8%	5.8%	7.4%	8.9%
Wholesale trade	2.9%	2.7%	2.1%	3.3%	2.2%	2.6%
Retail trade	12.0%	12.3%	10.2%	10.8%	11.9%	10.3%
Transportation and warehousing, and utilities	6.7%	7.5%	4.5%	5.6%	5.7%	5.9%
Information	0.7%	1.5%	2.0%	1.0%	1.7%	2.9%
Finance and insurance, & real estate & rental & leasing	3.2%	5.0%	6.1%	4.0%	8.8%	5.8%
Professional, scientific, & mgmt, & admin & waste mgmt svcs	7.3%	10.2%	16.3%	8.6%	12.5%	14.1%
Educational services, & health care & social assistance	23.2%	20.8%	21.4%	21.3%	21.9%	21.4%
Arts, entertainment, & recreation, & accommodation & food svcs	9.4%	11.0%	10.6%	10.5%	9.9%	9.7%
Other services, except public administration	4.1%	4.9%	5.0%	4.0%	4.5%	4.9%
Public administration	10.7%	5.2%	4.9%	9.1%	4.8%	4.7%
CLASS OF WORKER						

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
Civilian employed population 16 years and over						
Private wage and salary workers	68.8%	77.9%	78.2%	74.9%	79.9%	78.0%
Government workers	24.7%	15.2%	14.2%	20.7%	13.9%	14.3%
Self-employed in own not incorporated business workers	6.1%	6.7%	7.4%	4.1%	6.0%	7.6%
Unpaid family workers	0.3%	0.2%	0.2%	0.3%	0.2%	0.2%
INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)						
Total households						
Less than \$10,000	7.4%	4.2%	3.9%	6.9%	4.9%	4.4%
\$10,000 to \$14,999	5.2%	2.8%	2.6%	4.5%	3.1%	3.2%
\$15,000 to \$24,999	12.5%	6.1%	5.2%	9.3%	6.7%	5.6%
\$25,000 to \$34,999	8.8%	6.6%	5.6%	9.8%	7.7%	6.0%
\$35,000 to \$49,999	13.3%	9.6%	8.1%	14.1%	11.5%	8.7%
\$50,000 to \$74,999	15.2%	15.2%	13.8%	20.2%	17.6%	13.7%
\$75,000 to \$99,999	11.1%	13.3%	12.1%	13.0%	13.7%	12.0%
\$100,000 to \$149,999	17.2%	19.4%	19.2%	13.3%	17.3%	17.8%
\$150,000 to \$199,999	4.3%	10.5%	11.7%	4.8%	8.3%	10.7%
\$200,000 or more	5.0%	12.3%	17.7%	4.1%	9.2%	17.9%
Median household income (dollars)	\$53,847	\$84,505	\$96,974	\$56,439	\$72,581	\$91,905
Mean household income (dollars)	\$72,923	\$110,021	\$129,234	\$74,377	\$98,569	\$130,718
With earnings						
Mean earnings (dollars)	\$74,860	\$108,909	\$126,883	\$74,560	\$98,850	\$131,100
With Social Security						
Mean Social Security income (dollars)	\$18,233	\$22,692	\$22,723	\$21,338	\$24,079	\$22,158
With retirement income						
Mean retirement income (dollars)	\$28,121	\$36,392	\$39,550	\$31,606	\$32,379	\$38,967
With Supplemental Security Income						
Mean Supplemental Security Income (dollars)	\$8,846	\$11,066	\$11,004	\$11,928	\$11,321	\$11,248
With cash public assistance income						
Mean cash public assistance income (dollars)	\$5,739	\$5,489	\$5,966	\$2,956	\$4,303	\$5,909
Families						
Less than \$10,000	6.5%	2.8%	2.5%	5.8%	3.4%	2.9%
\$10,000 to \$14,999	2.8%	1.3%	1.3%	2.7%	1.7%	1.6%
\$15,000 to \$24,999	9.6%	4.2%	3.6%	7.5%	4.3%	4.2%
\$25,000 to \$34,999	8.9%	5.5%	4.5%	9.5%	6.0%	5.2%
\$35,000 to \$49,999	13.9%	8.9%	7.5%	13.8%	10.1%	8.2%

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
\$50,000 to \$74,999	16.1%	15.6%	13.3%	21.5%	17.2%	13.4%
\$75,000 to \$99,999	11.6%	14.2%	12.0%	13.7%	14.8%	12.2%
\$100,000 to \$149,999	19.4%	21.4%	20.2%	15.6%	20.4%	19.0%
\$150,000 to \$199,999	5.1%	11.9%	13.3%	5.3%	10.3%	12.1%
\$200,000 or more	6.0%	14.2%	21.7%	4.6%	11.8%	21.1%
Median family income (dollars)	\$60,776	\$95,246	\$111,734	\$61,867	\$86,737	\$105,010
Mean family income (dollars)	\$80,038	\$120,564	\$145,676	\$80,183	\$113,131	\$145,957
Per capita income (dollars)	\$21,216	\$35,356	\$46,957	\$27,516	\$38,334	\$45,591
Nonfamily households						
Median nonfamily income (dollars)	\$27,159	\$45,049	\$64,682	\$34,400	\$46,450	\$58,774
Mean nonfamily income (dollars)	\$45,226	\$69,040	\$88,375	\$51,480	\$65,638	\$89,171
Median earnings for workers (dollars)	\$30,547	\$40,149	\$46,264	\$32,675	\$40,887	\$45,032
Median earnings for male full-time, year-round workers (dollars)	\$53,208	\$59,391	\$68,795	\$45,235	\$57,589	\$68,101
Median earnings for female full-time, year-round workers (dollars)	\$42,221	\$48,214	\$59,340	\$38,022	\$48,577	\$58,583
HEALTH INSURANCE COVERAGE						
Civilian noninstitutionalized population						
With health insurance coverage	93.2%	91.9%	92.7%	86.5%	89.2%	92.9%
With private health insurance	43.4%	59.7%	69.3%	52.4%	63.6%	64.2%
With public coverage	57.1%	41.5%	34.1%	49.1%	38.1%	38.5%
No health insurance coverage	6.8%	8.1%	7.3%	13.5%	10.8%	7.1%
Civilian noninstitutionalized population under 19 years						
No health insurance coverage	2.5%	3.9%	4.0%	10.9%	8.7%	3.4%
Civilian noninstitutionalized population 19 to 64 years						
In labor force:						
Employed:						
With health insurance coverage	90.5%	89.3%	91.3%	81.5%	86.5%	91.0%
With private health insurance	63.1%	73.5%	81.2%	63.9%	77.1%	78.0%
With public coverage	31.3%	19.1%	13.7%	22.2%	12.6%	15.7%
No health insurance coverage	9.5%	10.7%	8.7%	18.5%	13.5%	9.0%
Unemployed:						
With health insurance coverage	84.8%	82.9%	79.7%	70.0%	75.4%	82.6%
With private health insurance	18.9%	38.5%	47.5%	32.1%	36.5%	43.1%
With public coverage	67.5%	47.7%	36.3%	45.4%	42.2%	42.7%
No health insurance coverage	15.2%	17.1%	20.3%	30.0%	24.6%	17.4%
Not in labor force:						

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
With health insurance coverage	87.7%	86.7%	88.0%	79.2%	83.0%	88.3%
With private health insurance	30.8%	47.8%	56.9%	35.6%	47.7%	49.4%
With public coverage	60.4%	44.1%	37.7%	49.3%	41.6%	44.0%
No health insurance coverage	12.3%	13.3%	12.0%	20.8%	17.0%	11.7%
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL						
All families	18.1%	8.6%	7.0%	14.8%	9.2%	8.5%
With related children of the householder under 18 years	24.3%	12.3%	10.1%	20.6%	14.4%	12.5%
With related children of the householder under 5 years only	28.5%	10.7%	7.9%	22.0%	13.6%	9.7%
Married couple families	10.4%	5.3%	4.2%	8.8%	5.2%	5.1%
With related children of the householder under 18 years	12.4%	6.5%	5.6%	9.0%	7.3%	6.7%
With related children of the householder under 5 years only	16.5%	4.8%	4.4%	11.7%	6.3%	4.3%
Families with female householder, no husband present	38.6%	21.1%	18.4%	31.7%	23.0%	20.3%
With related children of the householder under 18 years	48.0%	30.2%	25.4%	40.2%	31.3%	29.2%
With related children of the householder under 5 years only	50.2%	32.0%	23.7%	35.8%	33.4%	30.3%
All people	21.1%	11.4%	10.6%	17.5%	13.1%	12.1%
Under 18 years	28.0%	14.8%	12.6%	24.6%	17.9%	15.6%
Related children of the householder under 18 years	27.8%	14.4%	12.3%	24.4%	17.5%	15.3%
Related children of the householder under 5 years	31.7%	14.8%	12.8%	27.2%	19.3%	15.6%
Related children of the householder 5 to 17 years	26.4%	14.3%	12.1%	23.3%	16.9%	15.2%
18 years and over	18.1%	10.3%	10.0%	15.1%	11.7%	11.1%
18 to 64 years	17.9%	10.2%	10.2%	15.2%	12.4%	11.1%
65 years and over	19.4%	10.3%	9.4%	14.8%	9.3%	11.0%
People in families	19.7%	9.1%	7.6%	15.9%	10.6%	9.3%
Unrelated individuals 15 years and over	31.9%	25.9%	22.4%	27.2%	22.7%	24.8%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

TABLE 9. SELECTED HOUSING CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
TOTAL HOUSING UNITS								
Occupied housing units	86.2%	82.7%	75.3%	87.6%	81.7%	86.8%	83.5%	82.6%
Vacant housing units	13.8%	17.3%	24.7%	12.4%	18.3%	13.2%	16.5%	17.4%
Homeowner vacancy rate	0.0%	0.0%	9.5%	9.0%	2.5%	0.0%	0.0%	1.0%
Rental vacancy rate	4.4%	4.0%	4.9%	4.8%	5.1%	0.0%	4.5%	3.3%
VACANCY STATUS								

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
For rent	13.6%	0.9%	5.7%	17.5%	0.0%	8.3%	12.5%	6.9%
Rented, not occupied	0.9%	2.0%	0.0%	2.2%	0.0%	0.0%	0.0%	1.1%
For sale only	0.0%	0.0%	20.4%	3.2%	0.0%	7.6%	0.0%	2.7%
Sold, not occupied	5.6%	0.0%	0.0%	6.5%	0.0%	0.0%	0.0%	2.8%
For seasonal, recreational, or occasional use	1.0%	9.2%	0.0%	33.3%	0.0%	1.7%	6.3%	23.0%
For migrant workers	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Other vacant	78.8%	87.9%	73.9%	37.3%	100.0%	82.5%	81.3%	63.0%
UNITS IN STRUCTURE								
Total housing units								
1-unit, detached	62.7%	64.8%	71.7%	55.4%	75.0%	56.0%	56.3%	63.2%
1-unit, attached	1.7%	2.5%	1.5%	2.5%	1.6%	3.9%	0.0%	2.0%
2 units	2.0%	5.1%	1.2%	3.3%	1.7%	2.4%	6.9%	2.7%
3 or 4 units	6.5%	10.5%	8.2%	9.8%	3.4%	7.1%	14.8%	6.9%
5 to 9 units	13.2%	7.3%	12.6%	6.2%	10.0%	5.3%	16.0%	7.5%
10 to 19 units	5.7%	3.5%	2.4%	5.4%	1.0%	6.4%	0.0%	3.4%
20 or more units	3.3%	3.3%	1.4%	8.6%	3.8%	5.2%	1.7%	4.1%
Mobile home	4.4%	2.3%	1.0%	8.6%	3.5%	13.8%	4.5%	9.9%
Boat, RV, van, etc.	0.6%	0.6%	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%
YEAR STRUCTURE BUILT								
Total housing units								
Built 2020 or later	0.4%	0.1%	0.0%	0.5%	1.0%	0.0%	1.5%	0.4%
Built 2010 to 2019	10.3%	12.0%	4.8%	4.2%	16.2%	3.9%	4.1%	8.1%
Built 2000 to 2009	13.0%	19.0%	4.5%	14.8%	32.3%	18.5%	15.8%	20.1%
Built 1990 to 1999	21.6%	17.3%	28.1%	15.5%	18.7%	15.2%	11.8%	18.5%
Built 1980 to 1989	12.8%	16.4%	10.8%	18.6%	11.7%	2.0%	16.3%	14.9%
Built 1970 to 1979	16.1%	13.2%	18.7%	17.8%	2.2%	29.0%	11.5%	14.4%
Built 1960 to 1969	8.0%	9.4%	7.1%	12.4%	5.8%	9.6%	12.9%	8.9%
Built 1950 to 1959	11.0%	7.3%	20.0%	11.0%	9.3%	12.5%	13.0%	8.9%
Built 1940 to 1949	4.3%	3.3%	4.7%	2.7%	0.6%	6.7%	4.8%	3.2%
Built 1939 or earlier	2.4%	2.1%	1.2%	2.5%	2.1%	2.6%	8.2%	2.6%
HOUSING TENURE								
Occupied housing units								
Owner-occupied	53.1%	50.6%	63.9%	50.7%	65.8%	51.7%	47.8%	57.7%
Renter-occupied	46.9%	49.4%	36.1%	49.3%	34.2%	48.3%	52.2%	42.3%
Average HH size of owner-occupied unit	3.57	4.43	2.88	3.74	4.04	3.80	3.80	3.72

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
Average HH size of renter-occupied unit	3.45	3.75	3.60	3.42	3.82	3.66	4.43	3.55
SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)								
Housing units with a mortgage								
Less than 20.0 percent	37.8%	41.1%	34.4%	38.4%	35.8%	35.1%	19.3%	37.6%
20.0 to 24.9 percent	15.0%	13.1%	18.3%	12.6%	25.2%	15.9%	0.0%	16.1%
25.0 to 29.9 percent	7.0%	8.8%	4.2%	11.9%	7.0%	16.8%	7.3%	9.1%
30.0 to 34.9 percent	6.7%	8.8%	11.0%	6.4%	9.6%	23.0%	0.0%	7.7%
35.0 percent or more	33.5%	28.2%	32.1%	30.6%	22.4%	9.1%	73.4%	29.4%
Housing units without a mortgage								
Less than 10.0 percent	42.9%	58.7%	26.2%	44.9%	45.3%	53.3%	45.2%	42.8%
10.0 to 14.9 percent	29.2%	13.5%	37.5%	24.0%	31.8%	16.6%	0.0%	20.7%
15.0 to 19.9 percent	4.7%	10.5%	4.0%	9.1%	14.8%	5.3%	17.7%	11.8%
20.0 to 24.9 percent	5.4%	4.2%	4.9%	6.8%	0.7%	0.0%	14.5%	7.5%
25.0 to 29.9 percent	4.2%	5.7%	4.9%	4.9%	5.8%	0.0%	0.0%	4.5%
30.0 to 34.9 percent	2.2%	2.8%	0.0%	2.5%	1.6%	12.0%	0.0%	4.8%
35.0 percent or more	11.3%	4.6%	22.5%	7.9%	0.0%	12.8%	22.6%	7.9%
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRAPI)								
Occupied units paying rent								
Less than 15.0 percent	22.9%	9.3%	6.2%	11.9%	12.5%	23.6%	10.1%	14.0%
15.0 to 19.9 percent	8.4%	6.5%	3.8%	12.6%	5.6%	2.3%	4.2%	8.6%
20.0 to 24.9 percent	11.0%	7.7%	20.4%	9.6%	12.9%	10.3%	8.0%	10.2%
25.0 to 29.9 percent	8.0%	15.1%	3.5%	12.1%	23.5%	25.9%	20.2%	13.1%
30.0 to 34.9 percent	10.0%	7.9%	6.2%	11.6%	9.7%	8.5%	12.6%	9.9%
35.0 percent or more	39.8%	53.4%	59.9%	42.3%	35.8%	29.5%	45.0%	44.2%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table 25004; TNDG.

TABLE 10. SELECTED HOUSING CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
TOTAL HOUSING UNITS						
Occupied housing units	82.6%	88.1%	93.4%	80.5%	88.4%	92.3%
Vacant housing units	17.4%	11.9%	6.6%	19.5%	11.6%	7.7%
Homeowner vacancy rate	1.0%	1.4%	0.8%	1.1%	1.2%	0.9%
Rental vacancy rate	3.3%	4.8%	3.9%	5.8%	5.0%	4.0%
VACANCY STATUS						
For rent	6.9%	11.8%	26.7%	8.0%	13.7%	22.6%
Rented, not occupied	1.1%	2.1%	7.7%	1.3%	3.5%	4.5%
For sale only	2.7%	7.2%	6.4%	3.3%	6.0%	6.4%
Sold, not occupied	2.8%	4.0%	5.4%	2.7%	4.2%	5.3%
For seasonal, recreational, or occasional use	23.0%	59.9%	29.9%	68.5%	50.8%	32.9%
For migrant workers	0.5%	0.7%	0.1%	3.1%	0.2%	0.2%
Other vacant	63.0%	14.3%	23.9%	13.1%	21.5%	28.2%
UNITS IN STRUCTURE						
Total housing units						
1-unit, detached	63.2%	68.7%	50.4%	54.6%	63.9%	57.3%
1-unit, attached	2.0%	5.5%	10.1%	3.5%	5.0%	7.2%
2 units	2.7%	1.3%	1.7%	1.0%	1.3%	2.4%
3 or 4 units	6.9%	3.7%	4.8%	3.5%	3.4%	5.4%
5 to 9 units	7.5%	4.2%	7.1%	2.6%	3.8%	5.8%
10 to 19 units	3.4%	2.8%	6.5%	1.6%	4.0%	5.0%
20 or more units	4.1%	4.9%	15.8%	2.6%	8.4%	13.2%
Mobile home	9.9%	8.7%	3.4%	28.9%	9.7%	3.6%
Boat, RV, van, etc.	0.4%	0.1%	0.1%	1.7%	0.4%	0.1%
YEAR STRUCTURE BUILT						
Total housing units						
Built 2020 or later	0.4%	0.7%	0.4%	0.5%	0.8%	0.4%
Built 2010 to 2019	8.1%	8.3%	5.9%	11.0%	9.9%	5.6%
Built 2000 to 2009	20.1%	24.7%	11.8%	25.5%	22.8%	11.0%
Built 1990 to 1999	18.5%	15.0%	11.9%	20.8%	18.9%	10.6%
Built 1980 to 1989	14.9%	20.5%	18.6%	15.6%	17.1%	15.0%
Built 1970 to 1979	14.4%	13.9%	22.1%	13.6%	15.8%	17.2%
Built 1960 to 1969	8.9%	7.3%	11.8%	4.8%	6.8%	12.9%
Built 1950 to 1959	8.9%	5.8%	10.1%	5.4%	5.1%	12.9%

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
Built 1940 to 1949	3.2%	1.7%	3.2%	1.7%	1.5%	5.6%
Built 1939 or earlier	2.6%	2.1%	4.1%	1.2%	1.4%	8.9%
HOUSING TENURE						
Occupied housing units						
Owner-occupied	57.7%	68.5%	54.2%	69.1%	66.3%	55.6%
Renter-occupied	42.3%	31.5%	45.8%	30.9%	33.7%	44.4%
Average HH size of owner-occupied unit	3.72	3.23	2.87	2.69	2.62	2.99
Average HH size of renter-occupied unit	3.55	3.10	2.66	2.56	2.45	2.77
SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)						
Housing units with a mortgage						
Less than 20.0 percent	37.6%	33.9%	33.0%	46.3%	48.6%	35.6%
20.0 to 24.9 percent	16.1%	15.0%	15.7%	14.8%	15.2%	15.2%
25.0 to 29.9 percent	9.1%	12.4%	12.6%	10.3%	9.9%	11.6%
30.0 to 34.9 percent	7.7%	8.3%	8.7%	6.2%	6.4%	8.4%
35.0 percent or more	29.4%	30.4%	30.0%	22.3%	19.9%	29.2%
Housing units without a mortgage						
Less than 10.0 percent	42.8%	42.3%	47.2%	51.8%	53.2%	46.4%
10.0 to 14.9 percent	20.7%	17.3%	16.4%	18.2%	17.5%	17.5%
15.0 to 19.9 percent	11.8%	10.7%	9.6%	9.7%	9.0%	9.8%
20.0 to 24.9 percent	7.5%	6.5%	6.0%	5.6%	5.2%	6.1%
25.0 to 29.9 percent	4.5%	4.8%	4.5%	4.0%	3.4%	4.2%
30.0 to 34.9 percent	4.8%	3.6%	2.9%	1.5%	2.3%	3.0%
35.0 percent or more	7.9%	14.9%	13.5%	9.2%	9.2%	13.0%
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRAPI)						
Occupied units paying rent						
Less than 15.0 percent	14.0%	8.7%	8.0%	17.9%	12.7%	10.7%
15.0 to 19.9 percent	8.6%	10.7%	10.8%	15.4%	12.7%	11.3%
20.0 to 24.9 percent	10.2%	12.1%	12.1%	10.2%	13.5%	12.2%
25.0 to 29.9 percent	13.1%	10.1%	12.1%	8.7%	12.1%	11.3%
30.0 to 34.9 percent	9.9%	10.5%	9.7%	10.8%	9.5%	9.3%
35.0 percent or more	44.2%	48.0%	47.3%	37.1%	39.5%	45.0%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table 25004; TNDG.

TABLE 11. SELECTED EDUCATION AND SOCIAL CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
AGE BY EDUCATIONAL ATTAINMENT								
Population 18 to 24 years								
Less than high school graduate	4.6%	17.1%	35.9%	15.6%	0.0%	12.5%	42.7%	14.3%
High school graduate (includes equivalency)	46.4%	32.3%	32.3%	31.8%	28.6%	34.8%	30.8%	34.0%
Some college or associate's degree	42.5%	49.7%	31.8%	46.5%	68.5%	51.2%	20.9%	48.5%
Bachelor's degree or higher	6.4%	0.9%	0.0%	6.0%	3.0%	1.6%	5.6%	3.2%
Population 25 years and over								
Less than 9th grade	15.1%	19.9%	7.9%	14.7%	14.3%	7.2%	18.4%	14.3%
9th to 12th grade, no diploma	9.5%	15.4%	30.8%	13.0%	20.3%	12.7%	24.3%	14.4%
High school graduate (includes equivalency)	24.0%	19.3%	33.0%	24.9%	29.0%	24.3%	24.9%	25.3%
Some college, no degree	27.3%	18.0%	23.2%	22.0%	17.8%	28.3%	17.8%	22.5%
Associate's degree	8.9%	7.1%	3.7%	9.3%	6.9%	7.2%	8.4%	7.6%
Bachelor's degree	12.5%	16.1%	1.0%	10.5%	6.6%	13.7%	5.0%	11.8%
Graduate or professional degree	2.7%	4.1%	0.4%	5.6%	5.0%	6.6%	1.2%	4.1%
High school graduate or higher	75.5%	64.6%	61.3%	72.3%	65.3%	80.1%	57.2%	71.3%
Bachelor's degree or higher	15.2%	20.3%	1.4%	16.2%	11.6%	20.3%	6.1%	15.9%
1ST BACHELOR'S DEGREE								
Total population 25 years and over with a Bachelor's degree or higher								
Science and Engineering	34.1%	27.9%	36.4%	40.0%	35.3%	34.7%	20.7%	35.7%
Science and Engineering Related Fields	6.5%	8.2%	19.7%	8.3%	13.2%	13.0%	25.9%	9.2%
Business	19.5%	13.8%	6.1%	12.1%	7.6%	17.9%	0.0%	15.8%
Education	21.9%	16.4%	37.9%	18.5%	16.2%	6.1%	10.3%	15.3%
Arts, Humanities and Others	18.0%	33.8%	0.0%	21.2%	27.7%	28.3%	43.1%	24.0%
MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)								
Total population 25 years and over with earnings								
Less than high school graduate	\$28,060	\$19,164	\$24,330	\$24,873	\$14,021	\$18,712	\$26,184	\$22,867
High school graduate (includes equivalency)	\$29,566	\$25,859	\$29,254	\$33,324	\$43,958	\$46,687	\$48,750	\$33,299
Some college or associate's degree	\$45,153	\$30,962	\$40,099	\$38,545	\$78,679	\$47,281	-	\$38,768
Bachelor's degree	\$70,881	\$41,612	-	\$45,797	\$68,173	\$80,774	-	\$50,511
Graduate or professional degree	\$105,250	\$72,500	-	\$74,125	-	\$101,061	-	\$80,451
HISPANIC OR LATINO ORIGIN								
Not Hispanic or Latino	15.4%	2.2%	22.0%	11.8%	17.8%	19.5%	10.1%	14.6%
Hispanic or Latino	84.6%	97.8%	78.0%	88.2%	82.2%	80.5%	89.9%	85.4%
RACE								
White Alone	52.3%	41.6%	37.3%	27.2%	40.0%	50.2%	39.9%	39.5%

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
Black or African American Alone	0.9%	0.1%	12.6%	3.6%	1.2%	2.0%	0.4%	2.6%
American Indian and Alaska Native Alone	1.6%	0.6%	1.4%	0.8%	0.1%	0.1%	2.3%	1.5%
Asian Alone	1.2%	1.5%	0.7%	1.5%	1.3%	3.5%	0.5%	1.5%
Native Hawaiian and Other Pacific Islander Alone	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%
Some Other Race Alone	26.7%	35.1%	32.3%	46.0%	43.7%	24.9%	40.5%	34.8%
Two or More Races	17.3%	21.0%	15.5%	20.9%	13.6%	19.3%	16.2%	20.1%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table B02001, Table 03001; TNDG.

TABLE 12. SELECTED EDUCATION AND SOCIAL CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
AGE BY EDUCATIONAL ATTAINMENT						
Population 18 to 24 years						
Less than high school graduate	14.3%	9.3%	8.0%	14.7%	14.4%	9.7%
High school graduate (includes equivalency)	34.0%	41.2%	35.2%	34.6%	34.9%	33.1%
Some college or associate's degree	48.5%	42.1%	44.3%	46.1%	40.5%	44.9%
Bachelor's degree or higher	3.2%	7.5%	12.4%	4.6%	10.2%	12.2%
Population 25 years and over						
Less than 9th grade	14.3%	9.0%	6.0%	12.4%	4.8%	8.7%
9th to 12th grade, no diploma	14.4%	7.9%	5.3%	11.4%	6.5%	6.9%
High school graduate (includes equivalency)	25.3%	26.8%	18.1%	26.4%	23.6%	20.4%
Some college, no degree	22.5%	23.7%	21.2%	24.8%	24.2%	20.1%
Associate's degree	7.6%	8.6%	8.4%	8.5%	9.1%	8.0%
Bachelor's degree	11.8%	15.4%	25.0%	10.7%	19.6%	22.1%
Graduate or professional degree	4.1%	8.7%	16.1%	5.7%	12.2%	13.8%
High school graduate or higher	71.3%	83.1%	88.7%	76.2%	88.7%	84.4%
Bachelor's degree or higher	15.9%	24.1%	41.0%	16.4%	31.8%	35.9%
1ST BACHELOR'S DEGREE						
Total population 25 years and over with a Bachelor's degree or higher						
Science and Engineering	35.7%	35.0%	44.1%	28.1%	34.0%	42.3%
Science and Engineering Related Fields	9.2%	10.1%	8.3%	10.5%	10.2%	8.3%
Business	15.8%	21.2%	18.6%	18.8%	21.3%	17.9%
Education	15.3%	8.8%	6.0%	20.6%	13.0%	5.8%
Arts, Humanities and Others	24.0%	24.9%	22.9%	22.0%	21.4%	25.7%
MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)						

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
Total population 25 years and over with earnings						
Less than high school graduate	\$22,867	\$31,997	\$29,530	\$26,259	\$30,398	\$29,750
High school graduate (includes equivalency)	\$33,299	\$39,689	\$38,034	\$32,657	\$36,792	\$38,446
Some college or associate's degree	\$38,768	\$46,761	\$46,491	\$38,899	\$43,812	\$46,575
Bachelor's degree	\$50,511	\$66,220	\$74,134	\$49,893	\$61,392	\$75,306
Graduate or professional degree	\$80,451	\$93,615	\$99,906	\$68,028	\$78,782	\$105,279
HISPANIC OR LATINO ORIGIN						
Not Hispanic or Latino	14.6%	49.2%	65.5%	34.7%	68.0%	60.3%
Hispanic or Latino	85.4%	50.8%	34.5%	65.3%	32.0%	39.7%
RACE						
White Alone	39.5%	46.8%	57.8%	58.1%	66.7%	48.1%
Black or African American Alone	2.6%	6.5%	4.8%	1.9%	4.6%	5.6%
American Indian and Alaska Native Alone	1.5%	1.0%	0.8%	1.3%	4.1%	1.0%
Asian Alone	1.5%	6.9%	12.1%	1.1%	3.4%	15.1%
Native Hawaiian and Other Pacific Islander Alone	0.0%	0.3%	0.4%	0.0%	0.2%	0.4%
Some Other Race Alone	34.8%	23.6%	9.2%	11.7%	7.7%	16.2%
Two or More Races	20.1%	14.9%	14.9%	25.8%	13.4%	13.5%

Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles, Table B02001, Table 03001; TNDG.

TABLE 13. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS, BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, HOLTVILLE, IMPERIAL, WESTMORLAND, AND IMPERIAL COUNTY

Variables	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
HOUSEHOLDS								
Average household size	3.51	4.10	3.14	3.58	3.73	3.96	4.13	3.65
FAMILIES								
Average family size	4.25	4.83	3.83	4.12	4.74	4.66	4.49	4.36
AGE OF OWN CHILDREN								
Households with own children of the householder under 18 years								
Under 6 years only	18.7%	13.6%	13.6%	16.6%	12.1%	11.9%	18.7%	15.5%
Under 6 years and 6 to 17 years	28.0%	25.5%	21.0%	19.9%	32.2%	31.4%	39.4%	24.2%
6 to 17 years only	53.3%	60.9%	65.4%	63.5%	55.7%	56.7%	41.9%	60.4%
SELECTED HOUSEHOLDS BY TYPE								
Households with 1 or more people under 18 years	40.0%	42.8%	28.7%	42.4%	30.5%	45.4%	43.3%	39.8%
Households w/ 1 or more people 60 years and over	38.2%	50.2%	46.3%	42.2%	56.0%	35.0%	41.1%	43.5%
Households w/ 1 or more people 65 years and over	28.3%	41.6%	38.8%	34.3%	39.0%	20.8%	30.4%	33.9%
Householder living alone	22.6%	21.5%	26.5%	18.7%	27.4%	18.8%	19.3%	22.6%
65 years and over	9.9%	11.1%	9.6%	9.9%	13.8%	4.5%	7.4%	9.9%
SELECTED AGE CATEGORIES (POPULATION)								
Under 5 years	9.2%	7.3%	3.5%	6.6%	6.2%	10.0%	12.5%	7.5%
5 to 9 years	8.5%	7.4%	3.0%	9.0%	4.1%	8.5%	9.6%	7.4%
10 to 14 years	7.5%	9.6%	6.6%	9.7%	11.8%	10.3%	10.2%	8.8%
15 to 19 years	7.5%	7.9%	4.6%	7.9%	7.5%	10.6%	14.5%	7.9%
20 to 24 years	8.1%	6.3%	8.1%	6.6%	10.0%	6.4%	6.0%	7.1%
25 to 34 years	15.8%	14.3%	27.1%	13.9%	8.2%	9.3%	8.2%	14.7%
35 to 44 years	11.2%	11.5%	19.9%	11.6%	12.1%	12.5%	13.9%	12.3%
45 to 54 years	11.5%	10.5%	10.8%	10.8%	10.4%	10.5%	5.5%	11.0%
55 to 59 years	5.4%	5.4%	3.5%	4.2%	4.1%	6.5%	3.8%	5.2%
60 to 64 years	3.7%	4.2%	5.9%	5.7%	9.2%	6.3%	3.2%	5.0%
65 to 74 years	5.7%	9.8%	5.2%	7.6%	8.3%	5.1%	4.9%	7.6%
75 to 84 years	4.6%	4.3%	1.6%	4.0%	5.6%	3.0%	6.2%	4.0%
85 years and over	1.3%	1.6%	0.4%	2.3%	2.6%	0.9%	1.6%	1.6%

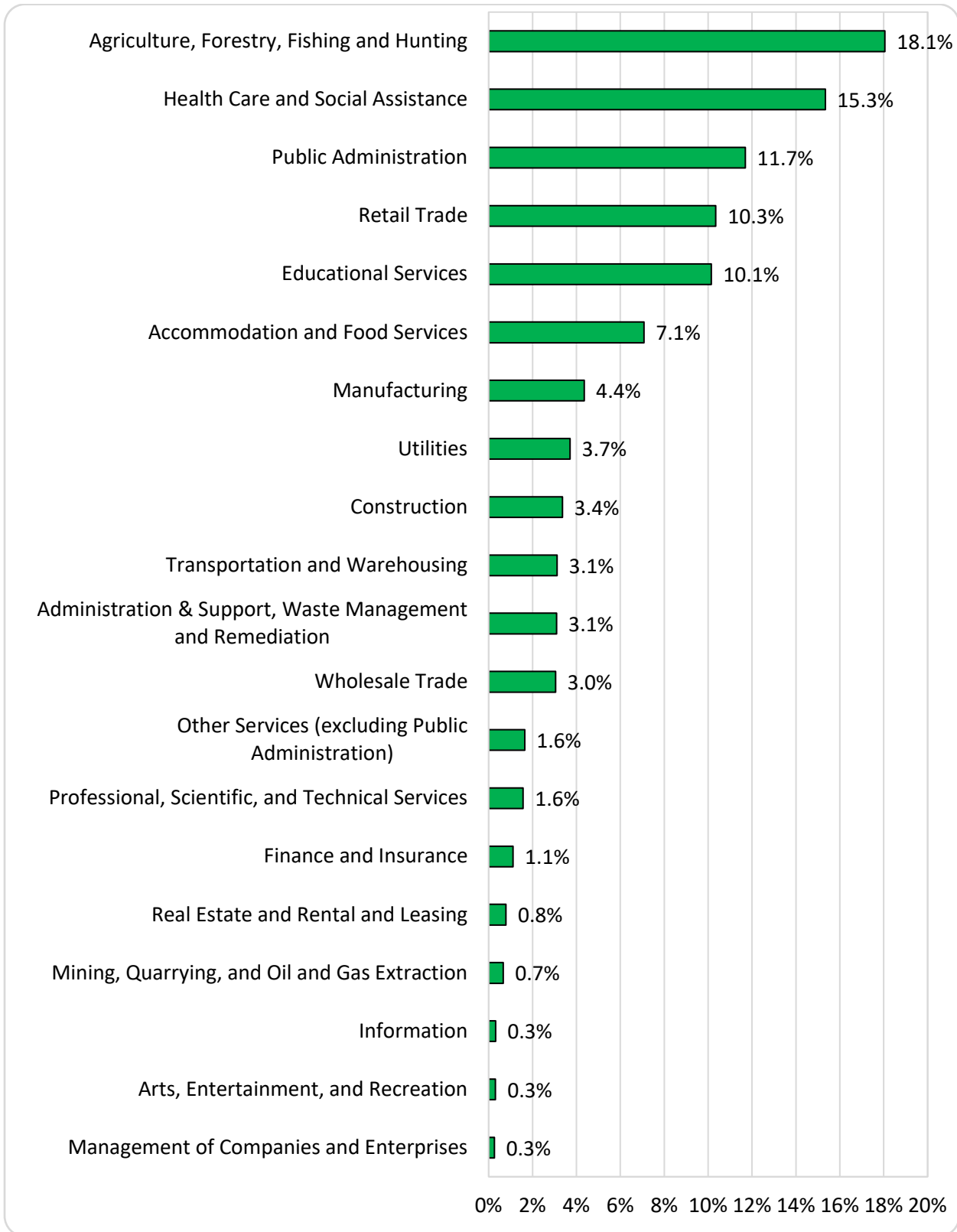
Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

TABLE 14. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA

Variables	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
HOUSEHOLDS						
Average household size	3.65	3.19	2.78	2.65	2.56	2.89
FAMILIES						
Average family size	4.36	3.70	3.34	3.10	3.13	3.47
AGE OF OWN CHILDREN						
Households with own children of the householder under 18 years						
Under 6 years only	15.5%	16.7%	23.0%	20.9%	20.0%	19.9%
Under 6 years and 6 to 17 years	24.2%	22.7%	18.7%	25.1%	21.8%	19.8%
6 to 17 years only	60.4%	60.6%	58.3%	54.0%	58.1%	60.4%
SELECTED HOUSEHOLDS BY TYPE						
Households with 1 or more people under 18 years	39.8%	37.6%	31.7%	36.5%	30.1%	33.3%
Households w/ 1 or more people 60 years and over	43.5%	43.8%	38.7%	46.8%	42.8%	40.8%
Households w/ 1 or more people 65 years and over	33.9%	33.4%	29.1%	38.2%	33.3%	30.8%
Householder living alone	22.6%	20.0%	24.1%	22.1%	27.1%	23.9%
65 years and over	9.9%	9.8%	9.2%	12.3%	11.6%	9.7%
SELECTED AGE CATEGORIES (POPULATION)						
Under 5 years	7.5%	6.0%	5.8%	6.9%	5.6%	5.7%
5 to 9 years	7.4%	6.7%	5.7%	6.6%	6.1%	6.0%
10 to 14 years	8.8%	7.5%	6.2%	7.4%	6.6%	6.6%
15 to 19 years	7.9%	7.4%	6.3%	7.1%	6.7%	6.6%
20 to 24 years	7.1%	6.9%	7.4%	7.7%	7.0%	6.8%
25 to 34 years	14.7%	13.8%	16.1%	13.9%	13.7%	15.0%
35 to 44 years	12.3%	13.2%	13.9%	11.2%	12.5%	13.6%
45 to 54 years	11.0%	12.2%	12.2%	9.8%	11.7%	12.6%
55 to 59 years	5.2%	6.0%	6.0%	4.7%	6.0%	6.2%
60 to 64 years	5.0%	5.6%	5.8%	5.0%	6.1%	5.9%
65 to 74 years	7.6%	8.5%	8.6%	9.7%	10.4%	8.7%
75 to 84 years	4.0%	4.6%	4.3%	7.8%	5.7%	4.3%
85 years and over	1.6%	1.7%	1.8%	2.2%	1.9%	1.9%

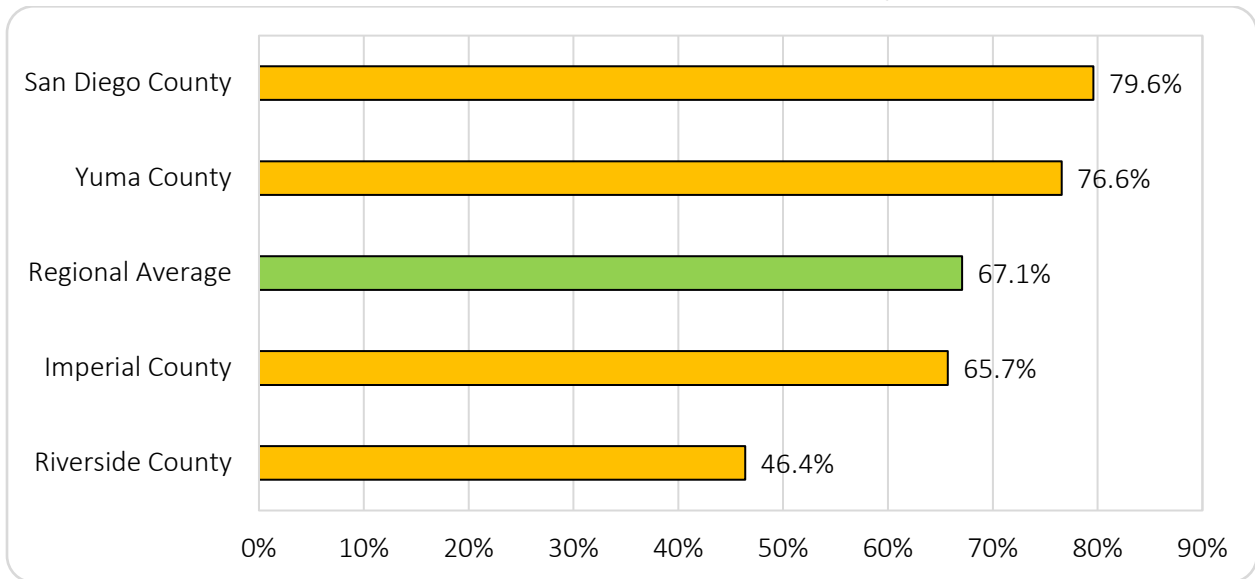
Source: U.S. Census Bureau, 2018-2022 ACS 5-Year Estimates: Data Profiles; TNDG.

FIGURE 1. IMPERIAL COUNTY JOBS BY INDUSTRY SECTOR, 2021



Source: U.S. Census Bureau, 2021: OnTheMap LEHD Origin-Destination Employment 2nd Quarter 2021; TNDG.

**FIGURE 2. IN-AREA LABOR FORCE EFFICIENCY,
PERCENT LIVING AND WORKING IN THE SAME LOCATION, 2021**



Source: U.S. Census Bureau, 2021: OnTheMap LEHD Origin-Destination Employment 2nd Quarter 2021; TNDG.

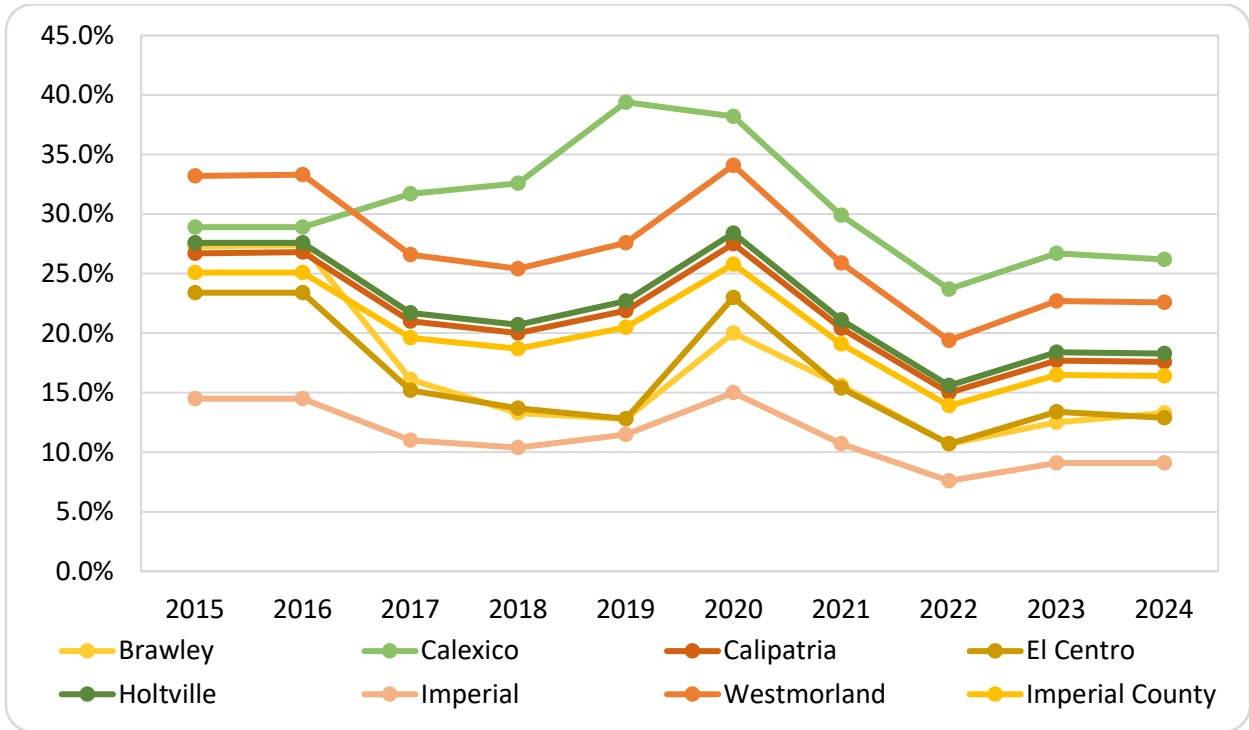
TABLE 15. INFLOW/OUTFLOW ANALYSIS FOR IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, AND YUMA COUNTY

Inflow/Outflow Analysis	Imperial County		Riverside County		San Diego County		Yuma County	
	Count	Share	Count	Share	Count	Share	Count	Share
Selection Area Labor Market Size								
Employed in the Selection Area	53,003	100.0%	674,626	100.0%	1,278,856	100.0%	60,450	100.0%
Living in the Selection Area	62,923	118.7%	871,154	129.1%	1,288,336	100.7%	65,061	107.6%
Net Job Inflow (+) or Outflow (-)	-9,920	-	-196,528	-	-9,480	-	-4,611	-
In-Area Labor Force Efficiency								
Living in the Selection Area	62,923	100.0%	871,154	100.0%	1,288,336	100.0%	65,061	100.0%
Living and Employed in the Selection Area	41,352	65.7%	404,194	46.4%	1,025,683	79.6%	49,817	76.6%
Living in the Selection Area but Employed Outside	21,571	34.3%	466,960	53.6%	262,653	20.4%	15,244	23.4%
In-Area Employment Efficiency								
Employed in the Selection Area	53,003	100.0%	674,626	100.0%	1,278,856	100.0%	60,450	100.0%
Employed and Living in the Selection Area	41,352	78.0%	404,194	59.9%	1,025,683	80.2%	49,817	82.4%
Employed in the Selection Area but Living Outside	11,651	22.0%	270,432	40.1%	253,173	19.8%	10,633	17.6%
Outflow Job Characteristics								
External Jobs Filled by Residents	21,571	100.0%	466,960	100.0%	262,653	100.0%	15,244	100.0%
Workers Aged 29 or younger	5,559	25.8%	102,217	21.9%	61,131	23.3%	4,046	26.5%
Workers Aged 30 to 54	11,449	53.1%	258,211	55.3%	142,808	54.4%	7,828	51.4%
Workers Aged 55 or older	4,563	21.2%	106,532	22.8%	58,714	22.4%	3,370	22.1%
Workers Earning \$1,250 per month or less	3,803	17.6%	55,415	11.9%	32,445	12.4%	2,847	18.7%
Workers Earning \$1,251 to \$3,333 per month	8,259	38.3%	136,144	29.2%	72,976	27.8%	6,244	41.0%
Workers Earning More than \$3,333 per month	9,509	44.1%	275,401	59.0%	157,232	59.9%	6,153	40.4%
Workers in the "Goods Producing" Industry Class	4,617	21.4%	82,543	17.7%	37,379	14.2%	2,720	17.8%
Workers in the "Trade, Transportation, and Utilities" Industry Class	5,924	27.5%	122,027	26.1%	67,573	25.7%	3,727	24.4%
Workers in the "All Other Services" Industry Class	11,030	51.1%	262,390	56.2%	157,701	60.0%	8,797	57.7%
Inflow Job Characteristics								
Internal Jobs Filled by Outside Workers	11,651	100.0%	270,432	100.0%	253,173	100.0%	10,633	100.0%
Workers Aged 29 or younger	3,029	26.0%	70,808	26.2%	62,777	24.8%	2,697	25.4%
Workers Aged 30 to 54	5,968	51.2%	141,268	52.2%	137,452	54.3%	5,193	48.8%

Inflow/Outflow Analysis	Imperial County		Riverside County		San Diego County		Yuma County	
	Count	Share	Count	Share	Count	Share	Count	Share
Workers Aged 55 or older	2,654	22.8%	58,356	21.6%	52,944	20.9%	2,743	25.8%
Workers Earning \$1,250 per month or less	2,384	20.5%	38,199	14.1%	29,978	11.8%	2,743	25.8%
Workers Earning \$1,251 to \$3,333 per month	4,117	35.3%	93,768	34.7%	71,457	28.2%	4,047	38.1%
Workers Earning More than \$3,333 per month	5,150	44.2%	138,465	51.2%	151,738	59.9%	3,843	36.1%
Workers in the “Goods Producing” Industry Class	3,389	29.1%	51,463	19.0%	39,424	15.6%	2,604	24.5%
Workers in the “Trade, Transportation, and Utilities” Industry Class	3,356	28.8%	88,359	32.7%	53,821	21.3%	2,859	26.9%
Workers in the “All Other Services” Industry Class	4,906	42.1%	130,610	48.3%	159,928	63.2%	5,170	48.6%
Interior Job Characteristics								
Internal Jobs Filled by Residents	41,352	100.0%	404,194	100.0%	1,025,683	100.0%	49,817	100.0%
Workers Aged 29 or younger	7,412	17.9%	89,855	22.2%	205,333	20.0%	11,609	23.3%
Workers Aged 30 to 54	23,920	57.8%	218,689	54.1%	577,234	56.3%	26,722	53.6%
Workers Aged 55 or older	10,020	24.2%	95,650	23.7%	243,116	23.7%	11,486	23.1%
Workers Earning \$1,250 per month or less	7,693	18.6%	53,495	13.2%	110,192	10.7%	11,035	22.2%
Workers Earning \$1,251 to \$3,333 per month	14,718	35.6%	146,970	36.4%	278,873	27.2%	21,024	42.2%
Workers Earning More than \$3,333 per month	18,941	45.8%	203,729	50.4%	636,618	62.1%	17,758	35.6%
Workers in the “Goods Producing” Industry Class	10,622	25.7%	68,431	16.9%	163,157	15.9%	14,414	28.9%
Workers in the “Trade, Transportation, and Utilities” Industry Class	7,363	17.8%	82,076	20.3%	143,692	14.0%	8,014	16.1%
Workers in the “All Other Services” Industry Class	23,367	56.5%	253,687	62.8%	718,834	70.1%	27,389	55.0%

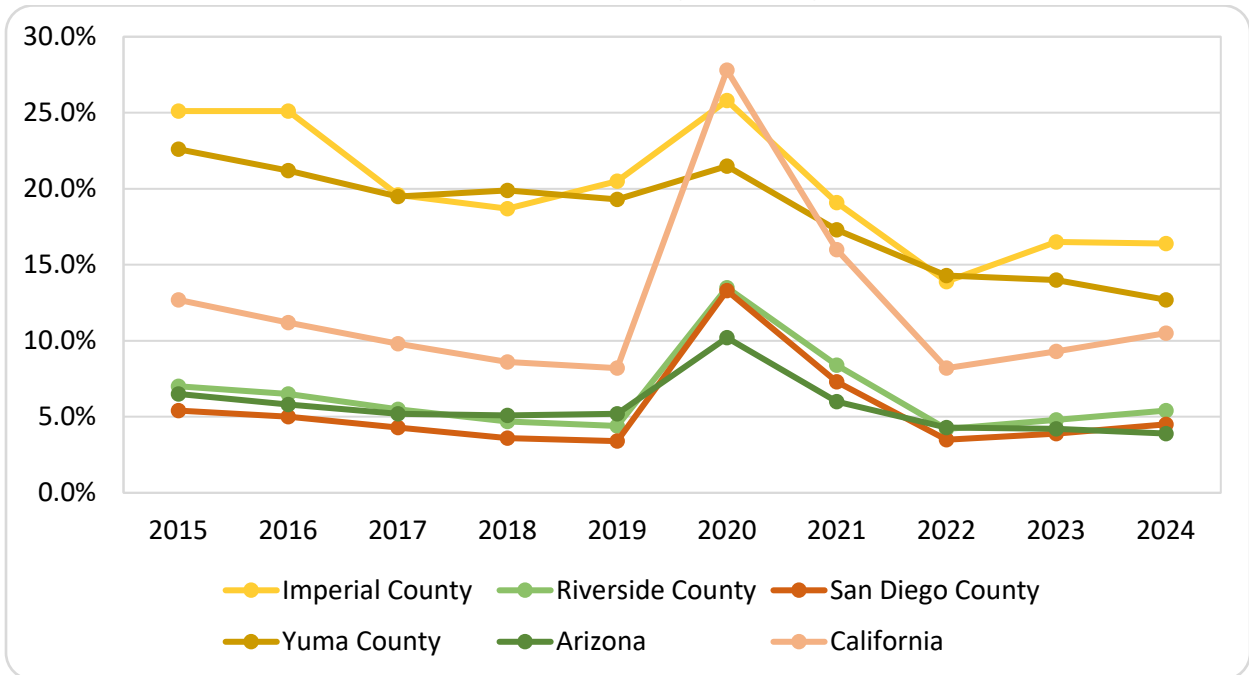
Source: U.S. Census Bureau, 2021: OnTheMap LEHD Origin-Destination Employment 2nd Quarter 2021; TNDG.

FIGURE 3. UNEMPLOYMENT RATE ESTIMATES: IMPERIAL COUNTY CITIES AND IMPERIAL COUNTY (2014-2023)



Source: Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics (LAUS) program; TNDG.

FIGURE 4. UNEMPLOYMENT RATE ESTIMATES: IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA (2014-2023)



Source: Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics (LAUS) program; TNDG.

TABLE 16. SCAG REGIONAL GROWTH PROJECTIONS: CITIES IN IMPERIAL COUNTY, IMPERIAL COUNTY, AND RIVERSIDE COUNTY

Area	2019-35		2035-50	
	# Change	% Change	# Change	% Change
Households				
Brawley	1,700	20.7%	1,100	11.1%
Calexico	3,700	35.6%	1,700	12.1%
Calipatria	300	30.0%	100	7.7%
El Centro	2,600	18.6%	2,100	12.7%
Holtville	200	11.8%	200	10.5%
Imperial	1,900	31.7%	900	11.4%
Westmorland	0	0.0%	0	0.0%
Unincorporated Imperial County	2,600	26.8%	800	6.5%
Imperial County	13,000	25.2%	6,900	10.7%
Riverside County	220,400	29.6%	97,500	10.1%
Employees				
Brawley	1,100	13.3%	700	7.4%
Calexico	2,100	19.4%	1,200	9.3%
Calipatria	300	15.8%	100	4.5%
El Centro	4,700	18.6%	3,800	12.7%
Holtville	200	11.1%	100	5.0%
Imperial	1,400	24.1%	1,000	13.9%
Westmorland	0	0.0%	0	0.0%
Unincorporated Imperial County	2,700	17.8%	1,800	10.1%
Imperial County	12,500	18.0%	8,700	10.6%
Riverside County	209,400	24.7%	128,300	12.1%

Source: SCAG 2024 RTP/SCS Growth Projections; TNDG.

TABLE 17. NET ASSESSED VALUE AND PERCENTAGE CHANGE FOR CITIES IN IMPERIAL COUNTY AND IMPERIAL COUNTY

Area	Fiscal Year					
	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Amount (\$000s)						
Brawley	\$1,223,070	\$1,286,849	\$1,331,965	\$1,410,548	\$1,515,780	\$1,659,061
Calexico	\$1,727,853	\$1,801,378	\$1,854,253	\$1,884,962	\$1,970,903	\$2,053,100
Calipatria	\$120,650	\$118,064	\$122,566	\$123,073	\$124,804	\$130,750
El Centro	\$2,665,595	\$2,741,440	\$2,881,014	\$2,971,943	\$3,123,583	\$3,289,201
Holtville	\$222,051	\$230,876	\$241,778	\$241,157	\$249,327	\$258,601
Imperial	\$1,238,681	\$1,324,505	\$1,428,948	\$1,529,654	\$1,672,728	\$1,829,282
Westmorland	\$50,440	\$73,429	\$68,268	\$74,357	\$75,230	\$79,657
Unincorp. County	\$5,526,153	\$5,776,319	\$5,841,220	\$5,887,155	\$6,183,805	\$6,575,260
Total County	\$12,774,493	\$13,352,859	\$13,770,012	\$14,122,849	\$14,916,160	\$15,874,913
Shares (%)						
Brawley	9.6%	9.6%	9.7%	10.0%	10.2%	10.5%
Calexico	13.5%	13.5%	13.5%	13.3%	13.2%	12.9%
Calipatria	0.9%	0.9%	0.9%	0.9%	0.8%	0.8%
El Centro	20.9%	20.5%	20.9%	21.0%	20.9%	20.7%
Holtville	1.7%	1.7%	1.8%	1.7%	1.7%	1.6%
Imperial	9.7%	9.9%	10.4%	10.8%	11.2%	11.5%
Westmorland	0.4%	0.5%	0.5%	0.5%	0.5%	0.5%
Unincorp. County	43.3%	43.3%	42.4%	41.7%	41.5%	41.4%
Total County	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: California State Controller, Annual Assessed Value Reports; TNDG.

TABLE 18. DISTRIBUTION OF BUILDING PERMIT BY BUILDING UNIT TYPE, CITIES IN IMPERIAL COUNTY AND IMPERIAL COUNTY, 2016-2023

Type	Brawley	Calexico	Calipatria	El Centro	Holtville	Imperial	Westmorland	Imperial County
1-Unit- Buildings	96.5%	85.3%	-	72.8%	100.0%	100.0%	100.0%	96.3%
2-Unit- Buildings	0.3%	4.7%	-	0.8%	0.0%	0.0%	0.0%	0.5%
3-4-Unit- Buildings	0.4%	1.6%	-	2.4%	0.0%	0.0%	0.0%	0.4%
5+ Units- Buildings	2.8%	8.4%	-	24.0%	0.0%	0.0%	0.0%	2.8%
Total	100.0%	100.0%	-	100.0%	100.0%	100.0%	100.0%	100.0%

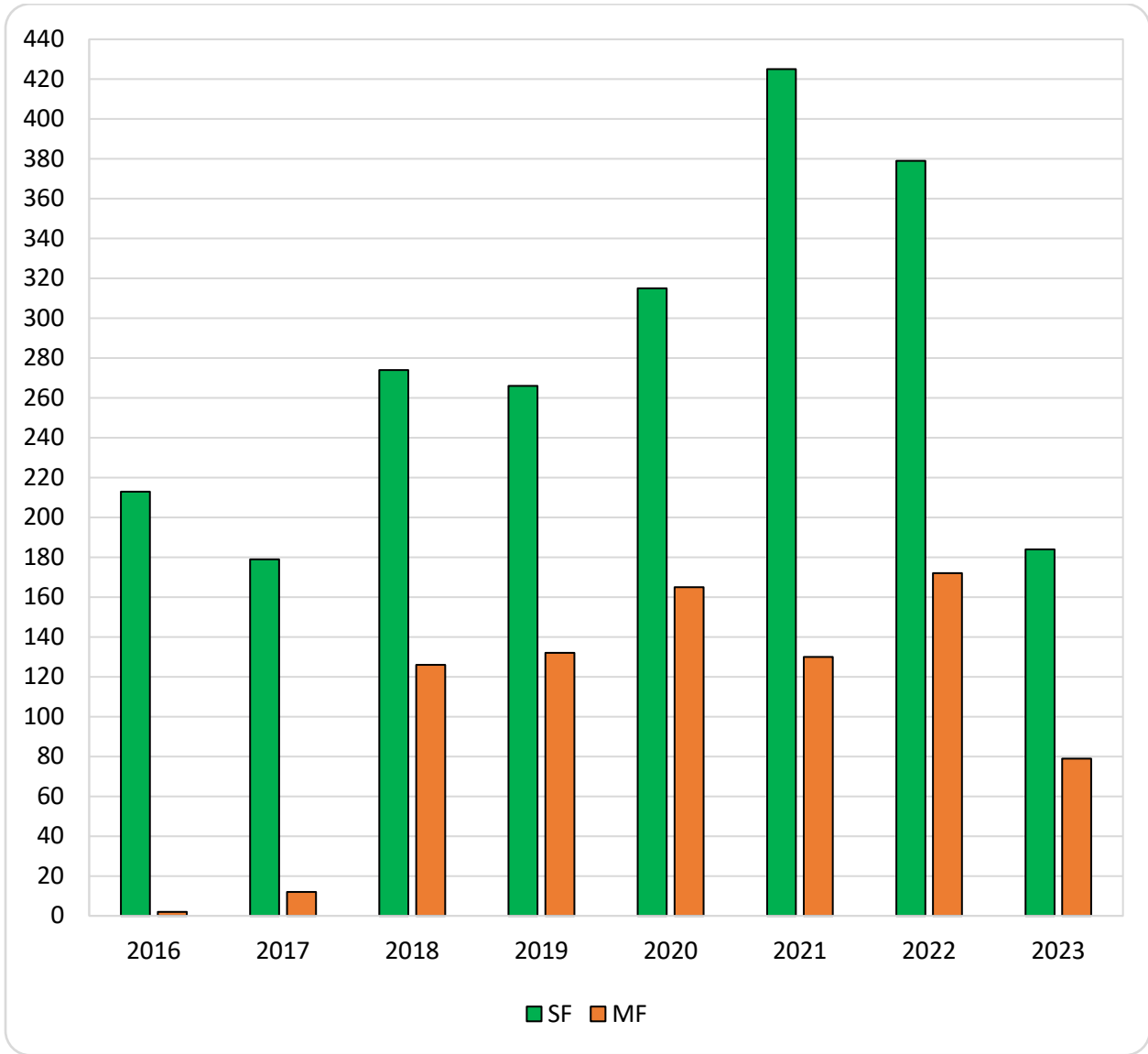
Source: U.S. Census Bureau, Residential Building Permit Statistics Survey; TNDG.

TABLE 19. DISTRIBUTION OF BUILDING PERMIT BY BUILDING UNIT TYPE, IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, YUMA COUNTY, AZ, AND CA, 2016-2023

Type	Imperial County	Riverside County	San Diego County	Yuma County	AZ	CA
1-Unit-Buildings	96.3%	98.2%	88.7%	98.4%	96.9%	94.6%
2-Unit- Buildings	0.5%	0.2%	1.8%	0.8%	1.5%	1.8%
3-4-Unit- Buildings	0.4%	0.5%	3.2%	0.2%	0.2%	0.8%
5+ Units- Buildings	2.8%	1.2%	6.3%	0.5%	1.4%	2.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: U.S. Census Bureau, Residential Building Permit Statistics Survey; TNDG.

FIGURE 5. TOTAL PRIVATE RESIDENTIAL BUILDING PERMIT UNIT TOTALS BY TYPE (SF AND MF), IMPERIAL COUNTY, 2016-2023



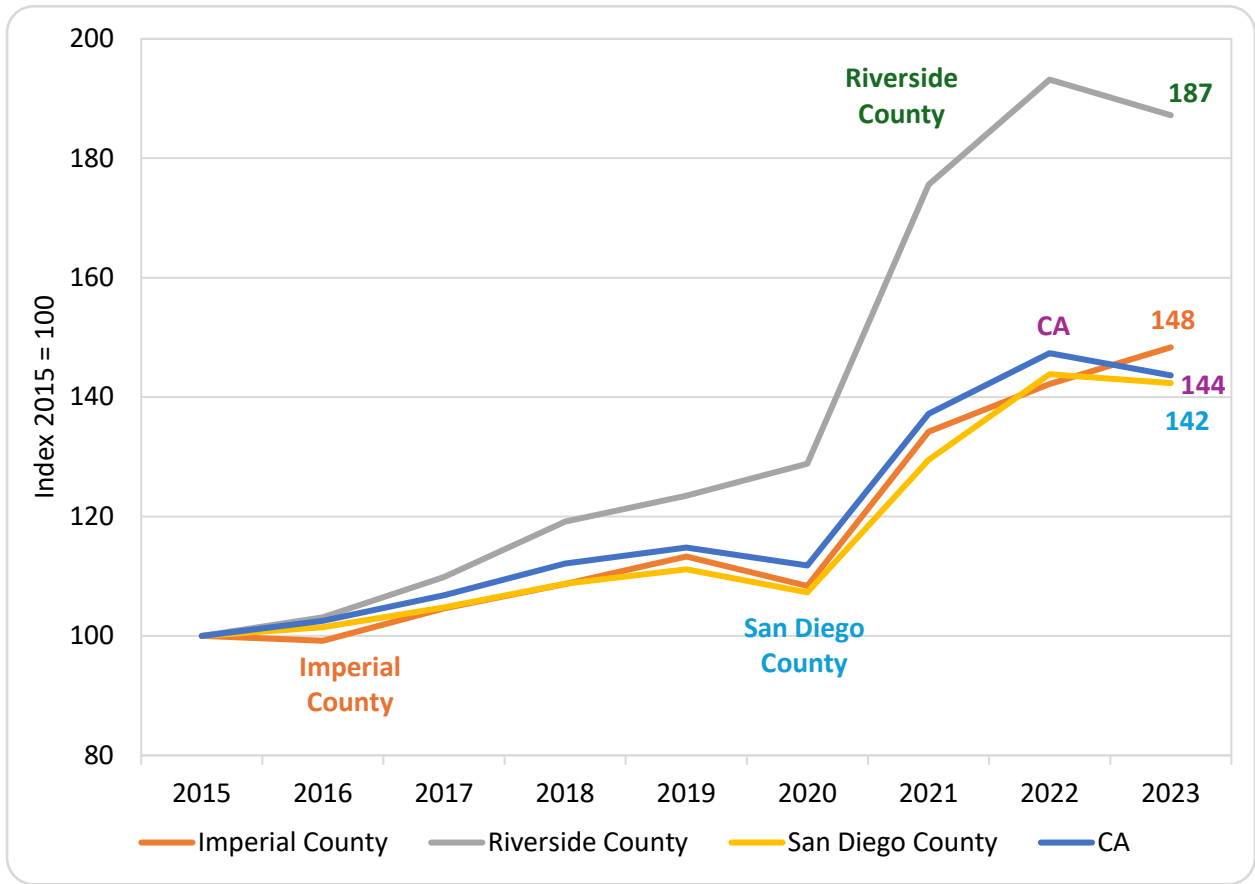
Source: U.S. Census Bureau, Residential Building Permit Statistics Survey; TNDG.

TABLE 20. TAXABLE RETAIL SALES (\$000S), IMPERIAL COUNTY, 2015-2023 (SELECTED YEARS)

Category	2015	2017	2019	2021	2023	2015-23 % Change
General Merchandise Stores	\$402,378	\$382,648	\$414,193	\$455,548	\$523,504	30.1%
Clothing and Clothing Accessories Stores	\$199,863	\$200,003	\$216,310	\$201,870	\$252,990	26.6%
Home Furnishings and Appliance Stores	\$62,374	\$72,338	\$63,254	\$72,014	\$74,198	19.0%
Other Retail Group	\$101,696	\$124,478	\$140,105	\$230,474	\$266,660	162.2%
Food and Beverage Stores	\$74,613	\$74,525	\$81,800	\$98,585	\$107,776	44.4%
Food Services and Drinking Places	\$192,849	\$213,360	\$228,252	\$245,817	\$284,667	47.6%
Bldg. Matrl. and Garden Equip. and Supplies	\$130,259	\$128,651	\$138,587	\$163,106	\$177,112	36.0%
Gasoline Stations	\$214,690	\$224,185	\$253,436	\$299,827	\$316,054	47.2%
Motor Vehicle and Parts Dealers	\$257,428	\$291,702	\$317,461	\$428,691	\$424,096	64.7%
Total Retail and Food Services	\$1,636,149	\$1,711,890	\$1,853,398	\$2,195,933	\$2,427,057	48.3%

Source: CDTFA; TNDG.

FIGURE 6. TAXABLE RETAIL SALES TRENDS (2015-2023), IMPERIAL COUNTY, RIVERSIDE COUNTY, SAN DIEGO COUNTY, AND CA



Source: CDTFA, TNDG.

TABLE 21. IMPERIAL COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (\$MILLIONS) (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. (14-23)
Accommodations	\$57.2	\$58.7	\$59.9	\$62.0	\$65.8	\$70.3	\$64.2	\$80.3	\$89.0	\$91.1	59.3%
Food Service	\$89.3	\$92.0	\$95.9	\$101.8	\$108.5	\$114.0	\$77.8	\$115.6	\$131.2	\$139.4	56.1%
Food Stores	\$42.1	\$43.7	\$44.1	\$44.9	\$45.7	\$48.2	\$37.1	\$52.0	\$65.3	\$70.4	67.2%
Arts, Ent. & Rec.	\$45.9	\$46.3	\$47.3	\$49.1	\$51.0	\$52.4	\$34.8	\$49.2	\$54.7	\$57.4	25.1%
Retail Sales	\$34.0	\$29.6	\$30.0	\$35.3	\$41.2	\$46.5	\$28.3	\$44.8	\$50.9	\$51.0	50.0%
Local Tran. & Gas	\$61.3	\$55.7	\$51.0	\$56.9	\$65.5	\$69.4	\$38.2	\$61.5	\$88.3	\$85.2	39.0%
Total	\$329.8	\$326.0	\$328.2	\$350.0	\$377.7	\$400.8	\$280.4	\$403.4	\$479.4	\$494.5	49.9%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 22. SHARE OF IMPERIAL COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Accommodations	17.3%	18.0%	18.3%	17.7%	17.4%	17.5%	22.9%	19.9%	18.6%	18.4%
Food Service	27.1%	28.2%	29.2%	29.1%	28.7%	28.4%	27.7%	28.7%	27.4%	28.2%
Food Stores	12.8%	13.4%	13.4%	12.8%	12.1%	12.0%	13.2%	12.9%	13.6%	14.2%
Arts, Ent. & Rec.	13.9%	14.2%	14.4%	14.0%	13.5%	13.1%	12.4%	12.2%	11.4%	11.6%
Retail Sales	10.3%	9.1%	9.1%	10.1%	10.9%	11.6%	10.1%	11.1%	10.6%	10.3%
Local Tran. & Gas	18.6%	17.1%	15.5%	16.3%	17.3%	17.3%	13.6%	15.2%	18.4%	17.2%

Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 23. SAN DIEGO COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (\$MILLIONS) (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. (14-23)
Accommodations	\$2,675.0	\$2,908.0	\$3,146.0	\$3,288.0	\$3,588.0	\$3,472.0	\$1,729.0	\$3,077.0	\$4,427.0	\$4,587.0	71.5%
Food Service	\$2,843.0	\$2,907.0	\$3,136.0	\$3,330.0	\$3,045.0	\$3,080.0	\$1,337.0	\$2,676.0	\$3,367.0	\$3,546.0	24.7%
Food Stores	\$467.0	\$506.0	\$518.0	\$528.0	\$472.0	\$472.0	\$205.0	\$522.0	\$665.0	\$687.0	47.1%
Arts, Ent. & Rec.	\$1,613.0	\$1,584.0	\$1,672.0	\$1,729.0	\$1,610.0	\$1,588.0	\$589.0	\$1,294.0	\$1,584.0	\$1,685.0	4.5%
Retail Sales	\$1,687.0	\$1,686.0	\$1,757.0	\$1,873.0	\$1,788.0	\$1,837.0	\$684.0	\$1,452.0	\$1,777.0	\$1,838.0	9.0%
Local Tran. & Gas	\$510.0	\$458.0	\$436.0	\$484.0	\$477.0	\$480.0	\$162.0	\$403.0	\$587.0	\$561.0	10.0%
Total	\$9,795.0	\$10,049.0	\$10,665.0	\$11,232.0	\$10,980.0	\$10,929.0	\$4,706.0	\$9,424.0	\$12,407.0	\$12,904.0	31.7%

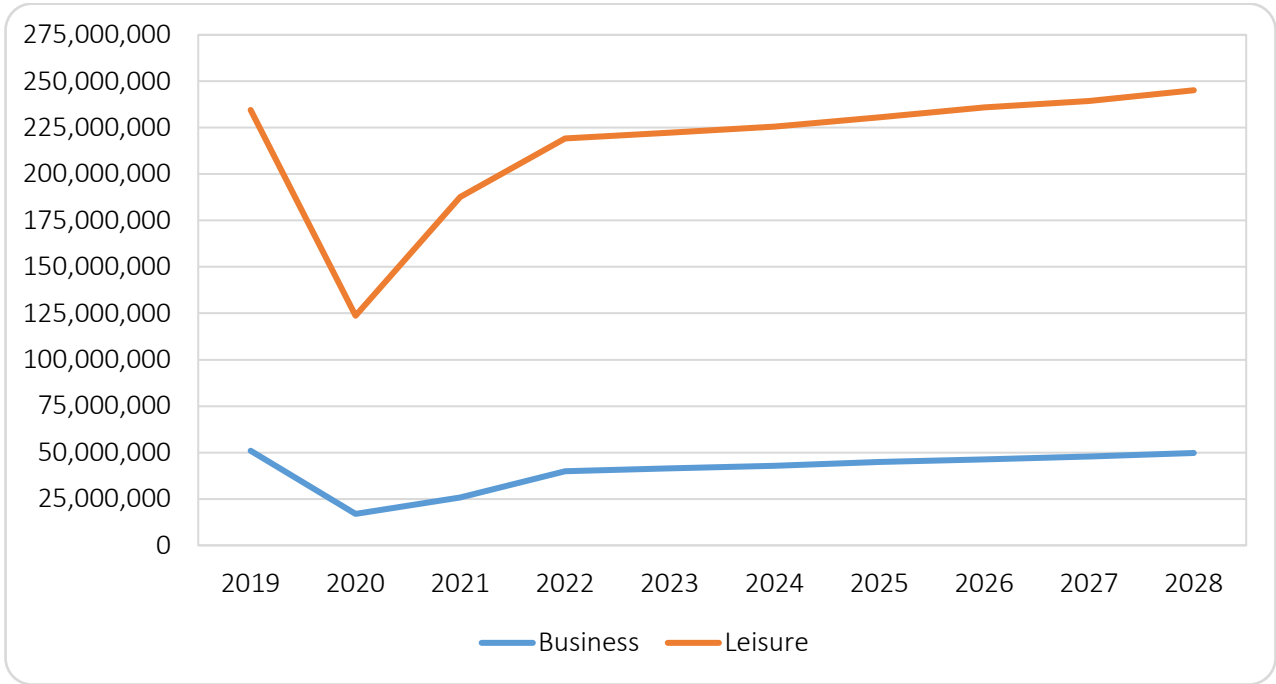
Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

TABLE 24. SHARE OF SAN DIEGO COUNTY VISITOR SPENDING BY COMMODITY PURCHASED (2014-2023)

Commodity	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Accommodations	27.3%	28.9%	29.5%	29.3%	32.7%	31.8%	36.7%	32.7%	35.7%	35.5%
Food Service	29.0%	28.9%	29.4%	29.6%	27.7%	28.2%	28.4%	28.4%	27.1%	27.5%
Food Stores	4.8%	5.0%	4.9%	4.7%	4.3%	4.3%	4.4%	5.5%	5.4%	5.3%
Arts, Ent. & Rec.	16.5%	15.8%	15.7%	15.4%	14.7%	14.5%	12.5%	13.7%	12.8%	13.1%
Retail Sales	17.2%	16.8%	16.5%	16.7%	16.3%	16.8%	14.5%	15.4%	14.3%	14.2%
Local Tran. & Gas	5.2%	4.6%	4.1%	4.3%	4.3%	4.4%	3.4%	4.3%	4.7%	4.3%

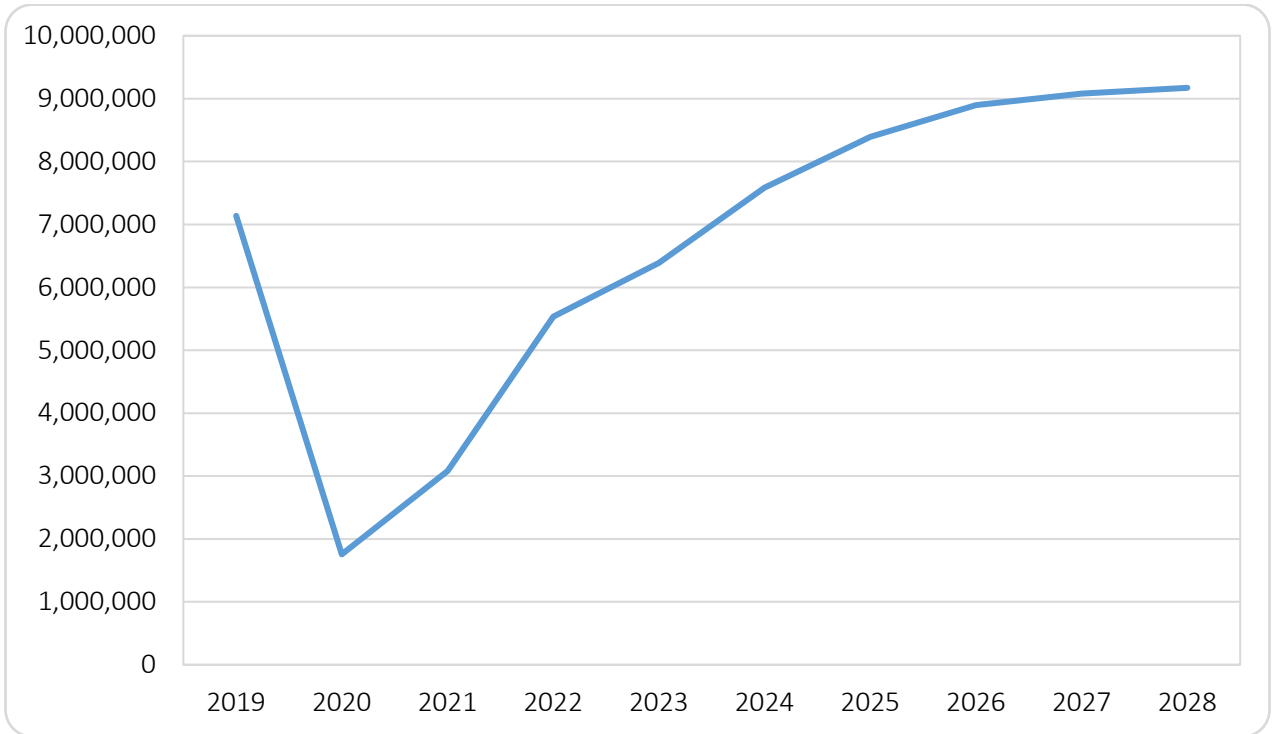
Source: Visit California, *The Economic Impact of Travel in California, 2023*. Prepared by Dean Runyan Associates; TNDG.

FIGURE 7. CALIFORNIA TOURISM VISIT PROJECTIONS BY TYPE OF VISIT (2019-2028)



Source: Visit California, *California Travel Forecast (June 2024)*; TNDG.

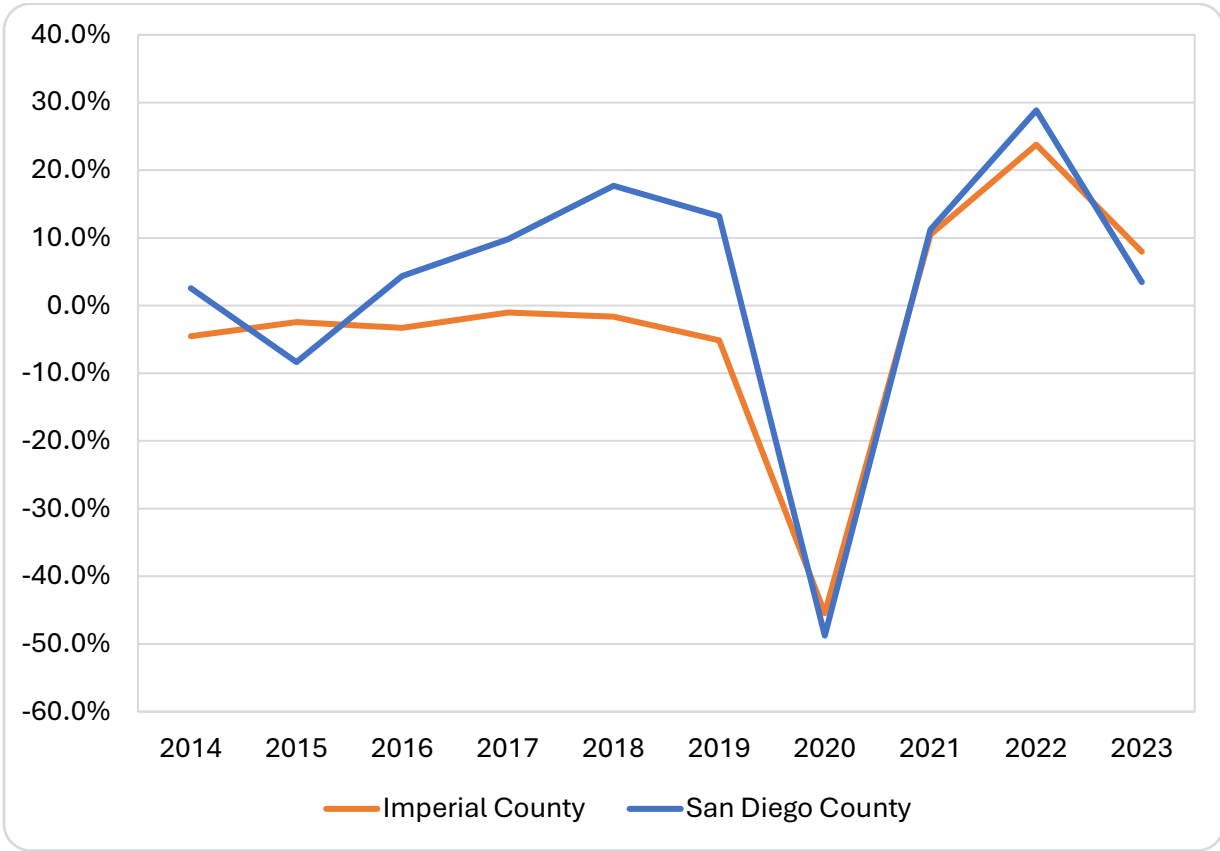
FIGURE 8. CALIFORNIA TOURISM VISIT PROJECTIONS BY LAND FROM MEXICO (2019-2028)



Source: Visit California, *California Travel Forecast (June 2024)*; TNDG.

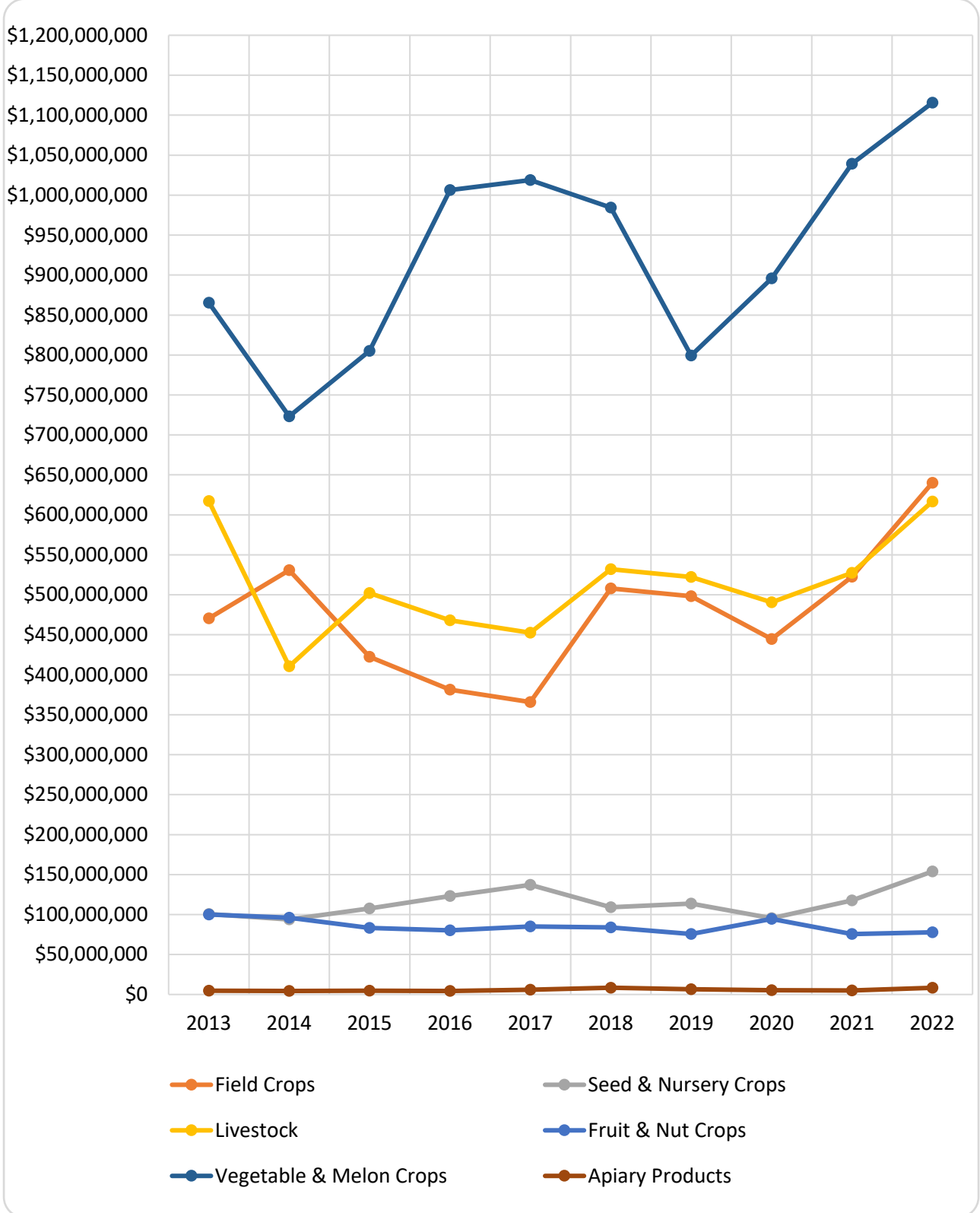
FIGURE 9. PEDESTRIAN FOOT TRAFFIC CROSS BORDER VISIT ANNUAL PERCENTAGE CHANGE,

IMPERIAL COUNTY AND SAN DIEGO COUNTY (2014-2023)



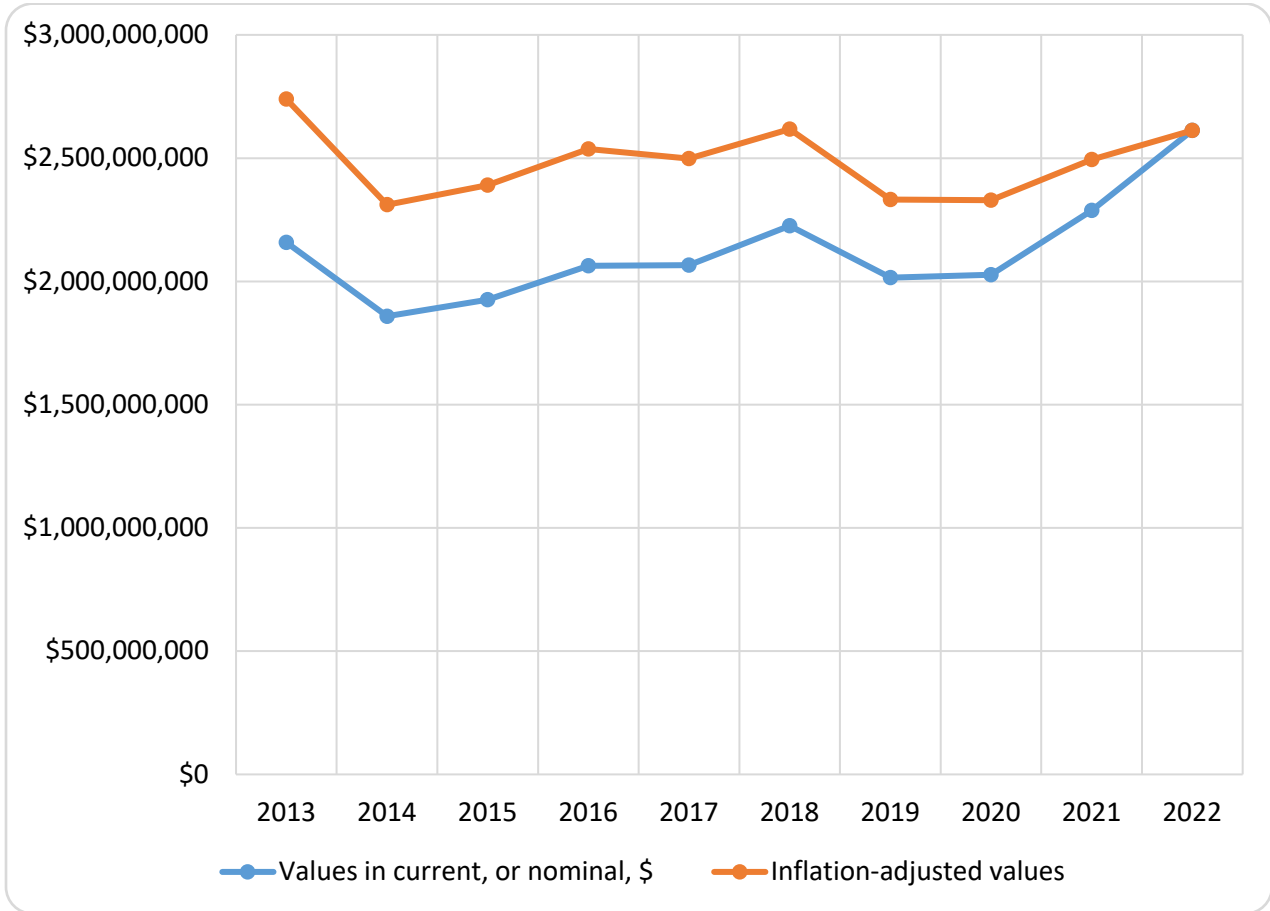
Source: U.S. Department of Transportation, Border Crossing Entry Data; TNDG.

FIGURE 10. IMPERIAL COUNTY AGRICULTURAL PRODUCTS COMPARATIVE SUMMARY (CURRENT DOLLARS) (2013-2022)



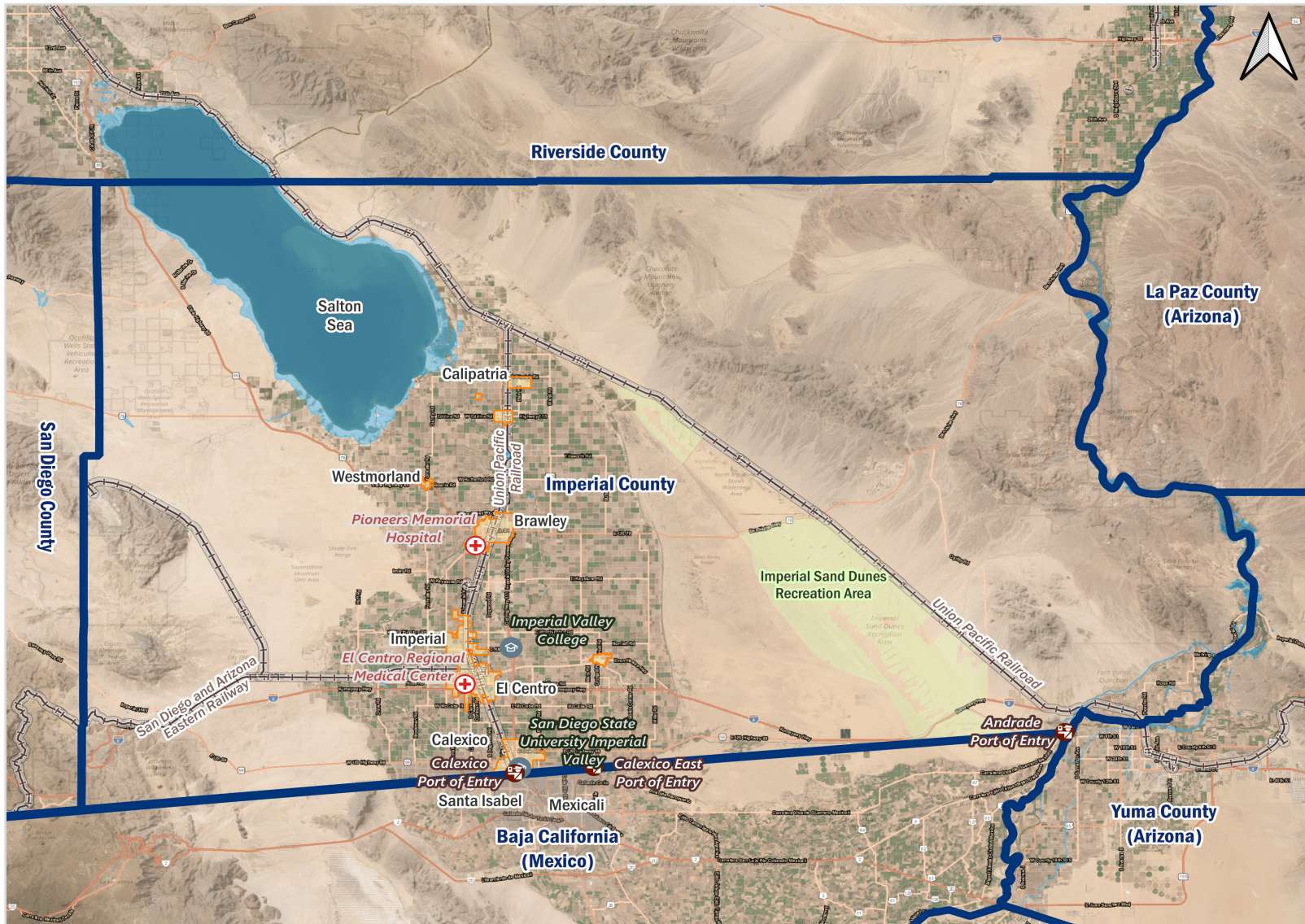
Source: Imperial County Agricultural Commissioner, Agricultural Crop & Livestock Reports, 2013-2022; TNDG.

FIGURE 11. IMPERIAL COUNTY TOTAL VALUE OF AGRICULTURAL PRODUCTS OVER TIME (2013-2022)



Source: Imperial County Agricultural Commissioner, Agricultural Crop & Livestock Reports, 2013-2022; TNDG.

FIGURE 12. MAP OF IMPERIAL COUNTY CITIES AND IMPERIAL COUNTY



Source: U.S. Census; ESRI; TNDG.

FIGURE 13. MAP OF IMPERIAL COUNTY AND SURROUNDING COUNTIES



Source: U.S. Census; ESRI; TNDG.

Appendix C – Descriptions of Traded & Local Clusters (from U.S. Cluster Mapping Project)

Traded Clusters:

Aerospace Vehicles and Defense. Establishments in this cluster manufacture aircraft, space vehicles, guided missiles, and related parts. This cluster also contains firms that manufacture the necessary search and navigation equipment used by these products.

Agricultural Inputs and Services. This cluster includes establishments primarily engaged in farming and related services. Farming includes soil preparation, planting, cultivation, harvest, fertilizer creation, and post-harvest activities. It also includes services that supply farm labor, support for animal production, and additional operations management.

Apparel. Establishments in this cluster are focused on manufacturing clothing and fabric accessories (for example, hats, gloves, and neckties) for men, women, and children.

Automotive. This cluster includes establishments along the value chain that are necessary for manufacturing cars, trucks, and other motorized land-based transportation equipment (other than motorcycles). This includes metal mills and foundries, manufacturers of metal automotive parts, and manufacturers of completed automobiles.

Biopharmaceuticals. Establishments in this cluster produce complex chemical and biological substances used in medications, vaccines, diagnostic tests, and similar medical applications.

Business Services. Firms in this cluster include establishments and services primarily designed to support other aspects of a business or to assist unrelated companies. This includes corporate headquarters. Professional services such as consulting, legal services, facilities support services, computer services, engineering and architectural services, and placement services. All for-hire ground passenger transportation services are also present in this cluster.

Coal Mining. This cluster includes establishments that mine coal and provide services to support coal mining.

Communications Equipment and Services. This cluster involves goods and services used for communications. This includes cable, wireless, and satellite services, as well as telephone, broadcasting, and wireless communications equipment.

Construction Products and Services. The establishments in this cluster supply construction materials, components, products, and services. Construction materials and components include those made of sand, stone, gravel, asphalt, cement, concrete, and other earthen substances. Construction products include pipes and heat exchangers. Construction services include the construction of pipelines for water, sewers, oil and gas, power, and communication, as well as building services for homes and industrial buildings.

Distribution and Electronic Commerce. This cluster consists primarily of traditional wholesalers as well as mail order houses and electronic merchants. The companies in this cluster mostly buy, hold,

and distribute a wide range of products such as apparel, food, chemicals, gasses, minerals, farm materials, machinery, and other merchandise. The cluster also contains firms that support distribution and electronic commerce operations, including packaging, labeling, and equipment rental and leasing.

Downstream Chemical Products. Establishments in this cluster manufacture complex chemical products for end users. These products include adhesives, beauty products, soaps, cleaners, film processing chemicals, dyes, paints, explosives, and lubricating oils.

Downstream Metal Products. This cluster contains establishments that manufacture metal containers, prefabricated metal structures, and end user metal products. These end user products include ammunition, kitchenware, hardware, metal bathroom fixtures, and similar metal products used in home finishing such as doors, windows and ornamentation.

Education and Knowledge Creation. This cluster contains all educational and training institutions, as well as related supporting establishments. It also includes research and development institutions in biotechnology, physical sciences, engineering, life sciences, and social sciences.

Electric Power Generation and Transmission. This cluster contains establishments primarily engaged in generating and distributing electric power. This includes power generated from alternative energy sources such as hydroelectric power, nuclear electric power, and solar and wind generated electric power.

Environmental Services. This cluster contains establishments primarily engaged in collection, treatment, processing, and disposal of hazardous and non-hazardous waste.

Financial Services. This cluster contains establishments involved in aiding the transaction and growth of financial assets for businesses and individuals. These firms include securities brokers, dealers, and exchanges; credit institutions; and financial investment support. Insurance firms are located in a separate Insurance cluster.

Fishing and Fishing Products. Establishments in this cluster are engaged primarily in catching fish and other seafood and processing the catch for consumption.

Food Processing and Manufacturing. This cluster includes firms involved in the processing of raw food materials and the manufacturing of downstream food products for end users. This includes millers and refineries of rice, flour, corn, sugar, and oilseeds. These upstream products contribute in part to producing specialty foods, animal foods, baked goods, candies, teas, coffees, beers, wines, other beverages, meats, packaged fruits and vegetables, and processed dairy products.

Footwear. Establishments in this cluster are those that manufacture men's and women's shoes, boots, slippers, and other footwear. This cluster also contains the upstream leather used in making footwear.

Forestry. Establishments in this cluster are those that involve growing and harvesting trees. It also includes support services for these activities.

Furniture. This cluster contains establishments that manufacture furniture, cabinets, and shelving for residential homes and offices. It also includes establishments that produce manufactured homes. The products in this cluster can be made of wood, metal, plastic, and/or textiles.

Hospitality and Tourism. This cluster contains establishments related to hospitality and tourism services and venues. This includes sport venues, casinos, museums, and other attractions. It also includes hotels and other accommodations, transportation, and services related to recreational travel such as reservation services and tour operators.

Information Technology and Analytical Instruments. This cluster consists of information technology and analytical products such as computers, software, audio visual equipment, laboratory instruments, and medical apparatus. The cluster also includes the standard and precision electronics used by these products (for example, circuit boards and semiconductor devices).

Insurance Services. This cluster consists of firms providing a range of insurance types, as well as support services such as reinsurance and claims adjustment.

Jewelry and Precious Metals. Establishments in this cluster manufacture jewelry, silverware, and fine tableware. This cluster also includes the upstream manufacture of jewelry parts and the processing of gemstones.

Leather and Related Products. This cluster consists of manufacturers of luggage and handbags made of leather and fabric. It also includes producers of personal and assorted other leather goods, as well as mills that produce textile bags and related products made from canvas.

Lighting and Electrical Equipment. This cluster contains firms involved in the manufacture of electrical equipment and electronic components. The companies in this cluster manufacture wire for communications, wiring devices, fiber optic cables, switchboards, lighting fixtures, motors, transformers, and related products.

Livestock Processing. This cluster contains establishments engaged in processing meat from livestock and livestock wholesaling.

Marketing, Design and Publishing. This cluster consists of establishments involved in design services (physical and graphical), marketing (including advertising creation, marketing research, media buying, and public relations), and publishing (both in hard copy and on the internet).

Medical Devices. Establishments in this cluster primarily manufacture surgical, medical, dental, optical, ophthalmic, and veterinary instruments and supplies.

Metal Mining. Establishments in this cluster mine various metals including iron, gold, silver, lead, copper, and uranium. It also includes firms involved in supporting metal mining activities.

Metalworking Technology. The establishments in this cluster manufacture machine tools and process metal for use in metal working. The cluster also contains the downstream manufacture of metal fasteners and hand tools.

Music and Sound Recording. Establishments in this cluster are primarily involved in the production and distribution of music and other sound recordings.

Nonmetal Mining. Establishments in this cluster mine earthen materials other than metals. This includes stone, granite, sand, clay, borate, and other minerals. The cluster also includes support for the nonmetal mining activities.

Oil and Gas Production and Transportation. This cluster includes firms involved in locating, extracting, refining, and transporting oil and gas. This includes companies that manufacture the equipment necessary to extract oil and gas, as well as companies that provide support services for oil and gas operations and pipeline transport.

Paper and Packaging. This cluster contains the paper mills and manufacturers of paper products used for shipping, packaging, containers, office supplies, personal products, and similar products.

Performing Arts. This cluster contains services that produce, promote, and support live artistic performances. Live performances include those by theater companies, dance troupes, musicians, and independent artists.

Plastics. Establishments in this cluster manufacture plastic materials, components, and products. The plastics and foams are manufactured for packaging, pipes, floor coverings, and related plastic products. The cluster also includes the upstream manufacturing of plastic materials and resins, as well as the industrial machines used to manufacture plastics.

Printing Services. Establishments in this cluster are primarily engaged in commercial printing, digital printing, and binding. The cluster includes upstream products and services necessary for printing (for example, ink and prepress services). It also includes end products such as books, greeting cards, business forms, and related goods.

Production Technology and Heavy Machinery. Establishments in this cluster primarily manufacture machines designed to produce parts and devices used in the production of downstream products. This cluster also includes end use heavy machinery such as air and material handling equipment. The machines are used for industrial, agricultural, construction, commercial industry, and related purposes.

Recreational and Small Electronics Goods. This cluster contains establishments that manufacture end use products for recreational and decorative purposes. These products include games, toys, bicycles, motorcycles, musical instruments, sporting goods, art supplies, office supplies, shades, and home accessories. This cluster also incorporates firms that produce small, simple electric goods like hairdryers, fans, and office machinery.

Textile Manufacturing. This cluster contains textile mills that primarily produce and finish fabrics for clothing, carpets, upholstery, and similar uses. The textiles include yarn, thread, fibers, hosiery, knits, and other specialty fabrics.

Tobacco. The establishments in this cluster manufacture cigarettes and other tobacco products. This also includes upstream tobacco leaf processing.

Trailers, Motor Homes and Appliances. This cluster includes establishments that manufacture trailers, campers, and motor homes, as well as major household appliances.

Transportation and Logistics. This cluster contains all air, rail, bus, and freight transportation services. It also includes related operation services and support activities such as inspections, maintenance, repairs, security, and loading/unloading.

Upstream Chemical Products. This cluster consists of firms that manufacture basic organic and inorganic chemicals and gases. The chemicals are usually separate elements that could be used as inputs for more complex downstream chemical products.

Upstream Metal Manufacturing. The establishments in this cluster manufacture upstream metal products such as pipes, tubes, metal closures, wires, springs, and related products. The cluster includes iron and steel mills and foundries, as well as related metal processing techniques.

Video Production and Distribution. The establishments in this cluster are primarily involved with the production and distribution of motion pictures and other video. This includes specialized viewing venues such as drive-in theaters.

Vulcanized and Fired Materials. This cluster contains firms that manufacture construction and other materials out of earthen substances such as clay, sand, and rubber at extremely high temperatures. The production processes create goods made of tile, brick, ceramic, glass, and rubber (including refractories and tires).

Water Transportation. This cluster contains all establishments involved in transporting people and goods over water. The cluster includes boat building, transportation, operations, and other support services.

Wood Products. The establishments in this cluster are primarily engaged in making upstream wood materials and manufacturing non-furniture wood products. Upstream establishments include sawmills, plywood and hardwood manufacturers, cut stock manufacturers, and wood preservation services.

Downstream establishments produce windows, doors, flooring, wood containers, prefabricated wood buildings, and related products.

Local Clusters:

Local Commercial Services. This cluster contains local professional establishments that provide legal services, accounting services, temporary help, and office administrative activities. This cluster also contains building support and security services, commercial printing and sign-making, professional laundry services (including dry cleaning), testing laboratories, and office supply stores.

Local Community and Civic Organizations. Establishments in this cluster primarily consist of local social service organizations such as community food and housing services and advocacy organizations. This cluster also contains grantmaking foundations, business associations, and political and religious organizations.

Local Education and Training. Establishments in this cluster include local educational institutions. These include schools for elementary and secondary education, technical and vocational training, fine arts instruction, as well as automobile driving.

Local Entertainment and Media. Establishments in this cluster primarily sell or otherwise distribute various media locally. The cluster includes newspaper publishers, radio and TV broadcasting stations, and movie theaters. It also contains local retail establishments that sell or rent books, music, movies, sport and hobby goods, and electronics.

Local Financial Services. This cluster contains local establishments that facilitate financial transactions for both businesses and individuals, such as deposit-taking institutions, third-party administrative services for pension and welfare funds, insurance agencies, tax preparation services, and payment collection agencies.

Local Food and Beverage Processing and Distribution. This cluster contains firms that sell food and beverages at the wholesale and retail levels. Products sold include meat, seafood, fruit and vegetables, general groceries, tobacco, alcoholic beverages, and specialty foods. The cluster also includes related distribution methods such as vending and direct selling.

Local Health Services. Firms in this cluster include local health care establishments and services such as hospitals, medical laboratories, home and residential care, and funeral services and crematories. This cluster also includes pharmacies and optical goods retail stores.

Local Hospitality Establishments. Establishments in this cluster primarily consist of local hospitality establishments that serve food and beverages (alcoholic and non-alcoholic), as well as recreational facilities including country clubs, fitness clubs, and bowling centers. This cluster also contains gift and souvenir retail stores.

Local Household Goods and Services. This cluster contains local establishments and services designed to support individual households such as landscape services, electronics repair, as well as retail stores for appliances, hardware, gardening, and furniture.

Local Industrial Products and Services. This cluster primarily consists of firms that provide maintenance, wholesaling, and distribution for local industrial goods and services. This cluster also includes consumer rental and leasing for electronics, appliances, and general equipment.

Local Logistical Services. This cluster primarily contains establishments that offer local passenger transportation and local transportation of freight and goods, including moving companies and couriers. This cluster also includes local storage facilities, truck and RV leasing, and passenger car rental services.

Local Motor Vehicle Products and Services. Establishments in this cluster consist of local motor vehicle wholesalers and dealers, as well as auto repair services, gas stations, parking lots, car washes, and vehicle towing.

Local Personal Services (Non-Medical). Establishments in this cluster provide local personal services including self-service laundry, hair care, photofinishing, repair services, and child care. This cluster also contains pet stores and retail stores for certain personal merchandise such as cosmetics.

Local Real Estate, Construction, and Development. Establishments in this cluster primarily provide local real estate services, general contracting, and specialty contracting for the building, purchasing, and renting of homes and related local infrastructure. This cluster also contains firms that support land development, concrete manufacturing, highway and street construction, as well as building equipment distribution.

Local Retailing of Clothing and General Merchandise. This cluster consists of local retail stores, department stores, and warehouse clubs that sell apparel, jewelry, luggage, sewing supplies, and general merchandise.

Local Utilities. Establishments in this cluster provide local communications services, energy distribution, as well as sanitary services for sewage and waste treatment.

Appendix D – Maps of Study Geographic Areas for Industry Cluster Analysis



Appendix E – Cluster Employee Database by Region

**Table E-1
Cluster Employment by Region, 2023**

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	95	819	17,005	108,992	651,980
Agricultural Inputs and Services	9,795	11,921	10,923	437,323	1,895,183
Apparel	37	583	1,889	34,726	130,947
Automotive	9	2,509	1,263	57,147	1,068,677
Biopharmaceuticals	28	1,142	9,006	47,067	349,259
Business Services	1,477	24,860	120,330	1,392,694	11,267,806
Coal Mining	12	0	0	57	47,127
Communications Equipment and Services	37	1,543	10,531	116,771	542,131
Construction Products and Services	316	5,788	3,935	70,747	991,030
Distribution and Electronic Commerce	3,463	87,464	61,432	996,613	9,119,126
Downstream Chemical Products	29	1,267	1,541	25,997	285,075
Downstream Metal Products	46	2,861	2,185	30,208	490,034
Education and Knowledge Creation	981	18,108	115,442	867,558	6,802,133
Electric Power Generation and Transmission	449	966	572	19,212	175,543
Environmental Services	109	475	1,321	17,678	146,497
Financial Services	174	3,674	19,740	218,364	2,219,497
Fishing and Fishing Products	0	17	166	2,443	61,579
Food Processing and Manufacturing	316	5,211	8,610	185,818	1,301,989
Footwear	0	8	21	1,169	17,203
Forestry	0	132	87	5,831	96,824
Furniture	17	2,159	1,744	30,782	384,725
Hospitality and Tourism	424	17,088	50,431	393,636	3,238,455
Information Technology and Analytical Instruments	94	2,735	27,109	401,384	1,666,242
Insurance Services	39	1,287	9,094	116,119	1,553,118
Jewelry and Precious Metals	3	57	202	3,521	27,478
Leather and Related Products	0	285	379	4,600	40,470
Lighting and Electrical Equipment	3	800	2,273	31,407	351,095
Livestock Processing	1,028	549	671	24,010	566,216
Local Commercial Services	2,236	50,910	112,108	1,298,610	10,183,496
Local Community and Civic Organizations	7,126	50,714	74,002	1,108,340	5,925,689
Local Education and Training	6,605	60,422	83,566	1,020,344	9,003,619
Local Entertainment and Media	618	6,912	15,918	236,007	1,636,276
Local Federal Government Services	3,134	11,653	138,579	448,016	4,877,660
Local Financial Services	677	10,593	25,006	305,923	3,507,950
Local Food and Beverage Processing and Distribution	3,246	45,677	66,116	838,552	7,118,970
Local Government Services	5,560	48,395	59,251	747,819	5,688,093
Local Health Services	5,315	86,521	174,289	2,001,178	19,127,717
Local Hospitality Establishments	4,207	92,716	158,611	1,667,400	13,700,180
Local Household Goods and Services	1,006	24,546	32,276	353,816	2,948,497
Local Industrial Products and Services	105	2,710	4,845	69,922	647,348
Local Logistical Services	1,325	18,400	24,390	396,861	3,256,088
Local Motor Vehicle Products and Services	2,436	33,152	42,248	504,611	4,944,057
Local Personal Services (Non-Medical)	2,357	34,111	55,364	640,230	5,262,764
Local Real Estate, Construction, and Development	3,428	112,927	150,217	1,602,615	13,519,137
Local Retailing of Clothing and General Merchandise	3,788	30,226	45,026	512,236	4,712,739
Local State Government Services	2,961	7,201	8,440	233,334	2,215,450
Local Utilities	165	3,600	10,345	104,202	1,092,410
Marketing, Design, and Publishing	183	6,576	21,197	366,680	2,009,596
Medical Devices	12	2,322	7,392	61,045	386,538
Metal Mining	284	1	4	860	49,781
Metalworking Technology	10	1,184	2,425	40,276	460,319
Music and Sound Recording	4	219	389	11,692	43,905
Nonmetal Mining	49	393	318	5,251	106,708
Oil and Gas Production and Transportation	13	283	309	24,007	569,523
Paper and Packaging	0	769	921	20,705	370,947
Performing Arts	50	3,548	8,386	150,675	763,120
Plastics	4	4,591	3,231	43,026	682,746
Printing Services	79	1,069	2,826	35,448	405,496
Production Technology and Heavy Machinery	91	2,894	7,061	62,504	1,018,703
Recreational and Small Electric Goods	10	2,278	3,714	25,302	208,871
Textile Manufacturing	0	91	401	10,226	183,592
Tobacco	0	0	13	264	11,161
Trailers, Motor Homes, and Appliances	1	697	61	4,256	172,952
Transportation and Logistics	736	9,285	11,552	222,689	2,346,173
Upstream Chemical Products	48	94	1,010	7,395	174,378
Upstream Metal Manufacturing	0	1,493	978	19,487	394,962
Video Production and Distribution	10	693	1,458	158,547	356,908
Vulcanized and Fired Materials	60	1,203	546	13,256	257,080
Water Transportation	18	88	7,522	32,284	324,284
Wood Products	38	2,080	876	26,903	420,217
Cluster Total	76,973	967,543	1,841,088	21,074,665	176,573,540
Traded Cluster Total	20,679	236,160	560,491	6,984,649	57,205,401
Local Cluster Total	56,293	731,383	1,280,596	14,090,016	119,368,139
Total Jobs	72,686	931,304	1,803,858	20,488,543	170,739,669

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-2
Distribution of Cluster Employment by Region, 2023

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	0.1%	0.1%	0.9%	0.5%	0.4%
Agricultural Inputs and Services	12.7%	1.2%	0.6%	2.1%	1.1%
Apparel	0.0%	0.1%	0.1%	0.2%	0.1%
Automotive	0.0%	0.3%	0.1%	0.3%	0.6%
Biopharmaceuticals	0.0%	0.1%	0.5%	0.2%	0.2%
Business Services	1.9%	2.6%	6.5%	6.6%	6.4%
Coal Mining	0.0%	0.0%	0.0%	0.0%	0.0%
Communications Equipment and Services	0.0%	0.2%	0.6%	0.6%	0.3%
Construction Products and Services	0.4%	0.6%	0.2%	0.3%	0.6%
Distribution and Electronic Commerce	4.5%	9.0%	3.3%	4.7%	5.2%
Downstream Chemical Products	0.0%	0.1%	0.1%	0.1%	0.2%
Downstream Metal Products	0.1%	0.3%	0.1%	0.1%	0.3%
Education and Knowledge Creation	1.3%	1.9%	6.3%	4.1%	3.9%
Electric Power Generation and Transmission	0.6%	0.1%	0.0%	0.1%	0.1%
Environmental Services	0.1%	0.0%	0.1%	0.1%	0.1%
Financial Services	0.2%	0.4%	1.1%	1.0%	1.3%
Fishing and Fishing Products	0.0%	0.0%	0.0%	0.0%	0.0%
Food Processing and Manufacturing	0.4%	0.5%	0.5%	0.9%	0.7%
Footwear	0.0%	0.0%	0.0%	0.0%	0.0%
Forestry	0.0%	0.0%	0.0%	0.0%	0.1%
Furniture	0.0%	0.2%	0.1%	0.1%	0.2%
Hospitality and Tourism	0.6%	1.8%	2.7%	1.9%	1.8%
Information Technology and Analytical Instruments	0.1%	0.3%	1.5%	1.9%	0.9%
Insurance Services	0.1%	0.1%	0.5%	0.6%	0.9%
Jewelry and Precious Metals	0.0%	0.0%	0.0%	0.0%	0.0%
Leather and Related Products	0.0%	0.0%	0.0%	0.0%	0.0%
Lighting and Electrical Equipment	0.0%	0.1%	0.1%	0.1%	0.2%
Livestock Processing	1.3%	0.1%	0.0%	0.1%	0.3%
Local Commercial Services	2.9%	5.3%	6.1%	6.2%	5.8%
Local Community and Civic Organizations	9.3%	5.2%	4.0%	5.3%	3.4%
Local Education and Training	8.6%	6.2%	4.5%	4.8%	5.1%
Local Entertainment and Media	0.8%	0.7%	0.9%	1.1%	0.9%
Local Federal Government Services	4.1%	1.2%	7.5%	2.1%	2.8%
Local Financial Services	0.9%	1.1%	1.4%	1.5%	2.0%
Local Food and Beverage Processing and Distribution	4.2%	4.7%	3.6%	4.0%	4.0%
Local Government Services	7.2%	5.0%	3.2%	3.5%	3.2%
Local Health Services	6.9%	8.9%	9.5%	9.5%	10.8%
Local Hospitality Establishments	5.5%	9.6%	8.6%	7.9%	7.8%
Local Household Goods and Services	1.3%	2.5%	1.8%	1.7%	1.7%
Local Industrial Products and Services	0.1%	0.3%	0.3%	0.3%	0.4%
Local Logistical Services	1.7%	1.9%	1.3%	1.9%	1.8%
Local Motor Vehicle Products and Services	3.2%	3.4%	2.3%	2.4%	2.8%
Local Personal Services (Non-Medical)	3.1%	3.5%	3.0%	3.0%	3.0%
Local Real Estate, Construction, and Development	4.5%	11.7%	8.2%	7.6%	7.7%
Local Retailing of Clothing and General Merchandise	4.9%	3.1%	2.4%	2.4%	2.7%
Local State Government Services	3.8%	0.7%	0.5%	1.1%	1.3%
Local Utilities	0.2%	0.4%	0.6%	0.5%	0.6%
Marketing, Design, and Publishing	0.2%	0.7%	1.2%	1.7%	1.1%
Medical Devices	0.0%	0.2%	0.4%	0.3%	0.2%
Metal Mining	0.4%	0.0%	0.0%	0.0%	0.0%
Metalworking Technology	0.0%	0.1%	0.1%	0.2%	0.3%
Music and Sound Recording	0.0%	0.0%	0.0%	0.1%	0.0%
Nonmetal Mining	0.1%	0.0%	0.0%	0.0%	0.1%
Oil and Gas Production and Transportation	0.0%	0.0%	0.0%	0.1%	0.3%
Paper and Packaging	0.0%	0.1%	0.1%	0.1%	0.2%
Performing Arts	0.1%	0.4%	0.5%	0.7%	0.4%
Plastics	0.0%	0.5%	0.2%	0.2%	0.4%
Printing Services	0.1%	0.1%	0.2%	0.2%	0.2%
Production Technology and Heavy Machinery	0.1%	0.3%	0.4%	0.3%	0.6%
Recreational and Small Electric Goods	0.0%	0.2%	0.2%	0.1%	0.1%
Textile Manufacturing	0.0%	0.0%	0.0%	0.0%	0.1%
Tobacco	0.0%	0.0%	0.0%	0.0%	0.0%
Trailers, Motor Homes, and Appliances	0.0%	0.1%	0.0%	0.0%	0.1%
Transportation and Logistics	1.0%	1.0%	0.6%	1.1%	1.3%
Upstream Chemical Products	0.1%	0.0%	0.1%	0.0%	0.1%
Upstream Metal Manufacturing	0.0%	0.2%	0.1%	0.1%	0.2%
Video Production and Distribution	0.0%	0.1%	0.1%	0.8%	0.2%
Vulcanized and Fired Materials	0.1%	0.1%	0.0%	0.1%	0.1%
Water Transportation	0.0%	0.0%	0.4%	0.2%	0.2%
Wood Products	0.0%	0.2%	0.0%	0.1%	0.2%
Cluster Total	100.0%	100.0%	100.0%	100.0%	100.0%
Traded Cluster Total	26.9%	24.4%	30.4%	33.1%	32.4%
Local Cluster Total	73.1%	75.6%	69.6%	66.9%	67.6%

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-3
Cluster Location Quotients (LQs) by Region, 2023

Cluster	Imperial County	Riverside County	San Diego County	CA
Aerospace Vehicles and Defense	0.33	0.23	2.50	1.40
Agricultural Inputs and Services	11.86	1.15	0.55	1.93
Apparel	0.66	0.81	1.38	2.22
Automotive	0.02	0.43	0.11	0.45
Biopharmaceuticals	0.19	0.60	2.47	1.13
Business Services	0.30	0.40	1.02	1.04
Coal Mining	0.57	0.00	0.00	0.01
Communications Equipment and Services	0.16	0.52	1.86	1.80
Construction Products and Services	0.73	1.07	0.38	0.60
Distribution and Electronic Commerce	0.87	1.75	0.65	0.92
Downstream Chemical Products	0.23	0.81	0.52	0.76
Downstream Metal Products	0.22	1.07	0.43	0.52
Education and Knowledge Creation	0.33	0.49	1.63	1.07
Electric Power Generation and Transmission	5.87	1.00	0.31	0.92
Environmental Services	1.70	0.59	0.86	1.01
Financial Services	0.18	0.30	0.85	0.82
Fishing and Fishing Products	0.00	0.05	0.26	0.33
Food Processing and Manufacturing	0.56	0.73	0.63	1.20
Footwear	0.00	0.08	0.12	0.57
Forestry	0.00	0.25	0.09	0.50
Furniture	0.10	1.02	0.43	0.67
Hospitality and Tourism	0.30	0.96	1.49	1.02
Information Technology and Analytical Instruments	0.13	0.30	1.56	2.02
Insurance Services	0.06	0.15	0.56	0.63
Jewelry and Precious Metals	0.26	0.38	0.71	1.07
Leather and Related Products	0.00	1.29	0.90	0.95
Lighting and Electrical Equipment	0.02	0.42	0.62	0.75
Livestock Processing	4.16	0.18	0.11	0.36
Local Commercial Services	0.50	0.91	1.06	1.07
Local Community and Civic Organizations	2.76	1.56	1.20	1.57
Local Education and Training	1.68	1.22	0.89	0.95
Local Entertainment and Media	0.87	0.77	0.93	1.21
Local Federal Government Services	1.47	0.44	2.72	0.77
Local Financial Services	0.44	0.55	0.68	0.73
Local Food and Beverage Processing and Distribution	1.05	1.17	0.89	0.99
Local Government Services	2.24	1.55	1.00	1.10
Local Health Services	0.64	0.83	0.87	0.88
Local Hospitality Establishments	0.70	1.24	1.11	1.02
Local Household Goods and Services	0.78	1.52	1.05	1.01
Local Industrial Products and Services	0.37	0.76	0.72	0.90
Local Logistical Services	0.93	1.03	0.72	1.02
Local Motor Vehicle Products and Services	1.13	1.22	0.82	0.86
Local Personal Services (Non-Medical)	1.03	1.18	1.01	1.02
Local Real Estate, Construction, and Development	0.58	1.52	1.07	0.99
Local Retailing of Clothing and General Merchandise	1.84	1.17	0.92	0.91
Local State Government Services	3.07	0.59	0.37	0.88
Local Utilities	0.35	0.60	0.91	0.80
Marketing, Design, and Publishing	0.21	0.60	1.01	1.53
Medical Devices	0.07	1.10	1.83	1.32
Metal Mining	13.07	0.00	0.01	0.14
Metalworking Technology	0.05	0.47	0.51	0.73
Music and Sound Recording	0.21	0.91	0.85	2.23
Nonmetal Mining	1.05	0.67	0.29	0.41
Oil and Gas Production and Transportation	0.05	0.09	0.05	0.35
Paper and Packaging	0.00	0.38	0.24	0.47
Performing Arts	0.15	0.85	1.05	1.65
Plastics	0.01	1.23	0.45	0.53
Printing Services	0.45	0.48	0.67	0.73
Production Technology and Heavy Machinery	0.20	0.52	0.66	0.51
Recreational and Small Electric Goods	0.11	1.99	1.71	1.01
Textile Manufacturing	0.00	0.09	0.21	0.47
Tobacco	0.00	0.00	0.12	0.20
Trailers, Motor Homes, and Appliances	0.01	0.74	0.03	0.21
Transportation and Logistics	0.72	0.72	0.47	0.80
Upstream Chemical Products	0.63	0.10	0.56	0.36
Upstream Metal Manufacturing	0.00	0.69	0.24	0.41
Video Production and Distribution	0.06	0.35	0.39	3.72
Vulcanized and Fired Materials	0.53	0.85	0.20	0.43
Water Transportation	0.13	0.05	2.22	0.83
Wood Products	0.21	0.90	0.20	0.54
Traded Cluster Total	0.83	0.75	0.94	1.02
Local Cluster Total	1.08	1.12	1.03	0.99

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-4
Cluster Wages by Region, 2023

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	\$80,463	\$63,864	\$120,117	\$132,746	\$119,453
Agricultural Inputs and Services	48,467	42,194	49,894	44,283	45,263
Apparel	29,473	40,798	61,589	57,528	51,360
Automotive	45,790	61,361	75,701	104,986	76,082
Biopharmaceuticals	79,273	41,703	135,173	156,838	133,086
Business Services	74,996	78,977	113,848	149,073	120,681
Coal Mining	139,492	0	0	138,380	107,557
Communications Equipment and Services	66,621	79,231	147,246	242,703	156,422
Construction Products and Services	84,440	79,821	91,536	107,215	87,745
Distribution and Electronic Commerce	58,000	56,939	85,392	81,628	75,294
Downstream Chemical Products	51,896	66,676	108,495	80,177	84,463
Downstream Metal Products	50,282	71,176	71,348	73,684	71,318
Education and Knowledge Creation	55,598	61,890	129,106	102,605	71,125
Electric Power Generation and Transmission	125,232	143,917	131,406	165,235	142,193
Environmental Services	60,908	59,584	78,135	82,373	77,713
Financial Services	62,292	100,089	143,516	241,748	193,845
Fishing and Fishing Products	0	46,849	56,290	61,890	61,590
Food Processing and Manufacturing	58,848	61,122	55,724	67,622	64,277
Footwear	0	25,633	98,210	107,112	57,943
Forestry	0	58,652	67,388	69,668	59,067
Furniture	51,789	58,922	65,043	60,473	55,495
Hospitality and Tourism	31,426	44,286	57,674	64,295	51,811
Information Technology and Analytical Instruments	82,237	91,601	153,296	245,278	165,628
Insurance Services	84,958	90,729	100,231	117,403	109,177
Jewelry and Precious Metals	40,350	45,882	58,018	55,303	56,842
Leather and Related Products	0	51,769	58,964	57,139	50,136
Lighting and Electrical Equipment	56,267	72,668	79,829	104,174	82,527
Livestock Processing	53,910	57,038	53,541	53,899	53,942
Local Commercial Services	44,613	48,055	78,141	72,992	66,769
Local Community and Civic Organizations	20,155	25,950	33,598	33,018	36,561
Local Education and Training	65,056	68,578	62,034	64,611	54,911
Local Entertainment and Media	27,609	39,885	54,979	131,140	73,632
Local Federal Government Services	105,972	73,562	81,614	82,222	80,406
Local Financial Services	63,822	81,773	110,301	114,744	98,963
Local Food and Beverage Processing and Distribution	36,871	48,383	44,032	48,092	42,367
Local Government Services	63,807	78,935	86,979	94,019	67,569
Local Health Services	63,404	72,861	81,064	85,232	71,131
Local Hospitality Establishments	25,414	29,490	31,238	31,419	26,927
Local Household Goods and Services	37,452	45,642	48,697	52,012	49,044
Local Industrial Products and Services	54,836	60,298	67,623	71,822	68,671
Local Logistical Services	59,462	58,341	54,854	62,320	56,350
Local Motor Vehicle Products and Services	45,750	60,089	59,972	63,139	56,344
Local Personal Services (Non-Medical)	32,487	35,665	40,051	42,505	37,433
Local Real Estate, Construction, and Development	55,934	65,431	76,614	78,406	69,765
Local Retailing of Clothing and General Merchandise	30,166	32,899	35,818	39,595	32,222
Local State Government Services	60,788	71,423	79,771	94,015	73,712
Local Utilities	90,383	96,452	131,706	136,080	106,951
Marketing, Design, and Publishing	55,637	63,719	101,838	195,401	124,650
Medical Devices	49,803	96,632	115,464	114,306	90,129
Metal Mining	107,759	61,044	112,176	102,946	113,264
Metalworking Technology	61,150	68,623	67,543	70,713	69,160
Music and Sound Recording	46,449	57,624	60,560	91,914	80,178
Nonmetal Mining	69,424	97,499	88,959	98,134	83,125
Oil and Gas Production and Transportation	77,445	95,607	89,628	156,682	138,132
Paper and Packaging	0	63,560	67,794	78,863	78,831
Performing Arts	40,701	41,553	44,916	98,468	57,130
Plastics	52,528	61,455	73,279	71,232	69,312
Printing Services	34,581	48,228	55,661	58,943	58,714
Production Technology and Heavy Machinery	68,776	77,096	114,746	95,125	80,633
Recreational and Small Electric Goods	40,604	48,607	85,243	78,366	67,116
Textile Manufacturing	0	47,795	48,965	59,929	60,814
Tobacco	0	82,694	120,879	85,541	89,037
Trailers, Motor Homes, and Appliances	45,790	49,139	50,210	66,807	63,046
Transportation and Logistics	61,433	69,427	69,738	81,747	80,896
Upstream Chemical Products	60,259	80,006	117,920	107,873	120,002
Upstream Metal Manufacturing	0	67,412	77,403	78,696	83,441
Video Production and Distribution	56,480	55,754	59,796	121,390	100,645
Vulcanized and Fired Materials	57,278	56,586	61,366	63,959	66,885
Water Transportation	69,620	57,584	80,366	117,227	86,529
Wood Products	36,012	60,921	76,460	62,738	60,030
Cluster Total	51,550	56,244	76,395	83,937	69,317
Traded Cluster Total	56,724	61,967	105,233	121,104	93,522
Local Cluster Total	49,649	54,396	63,773	65,512	57,717

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-5
Cluster Job Growth by Region, 2023

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	(33)	(158)	5,245	5,918	22,230
Agricultural Inputs and Services	(753)	(1,068)	72	41	47,532
Apparel	(18)	134	237	(27,788)	(49,396)
Automotive	4	181	149	29,610	159,963
Biopharmaceuticals	28	39	2,951	1,342	69,852
Business Services	472	4,630	26,340	280,211	2,722,182
Coal Mining	12	0	(3)	(204)	(39,261)
Communications Equipment and Services	(6)	(356)	(829)	6,144	2,567
Construction Products and Services	(21)	2,772	776	9,355	131,172
Distribution and Electronic Commerce	(417)	45,084	865	115,195	1,484,252
Downstream Chemical Products	15	258	673	2,923	20,417
Downstream Metal Products	(10)	852	64	261	61,708
Education and Knowledge Creation	494	(1,314)	17,064	77,037	264,672
Electric Power Generation and Transmission	66	206	(1,092)	852	(12,778)
Environmental Services	105	186	576	2,580	33,648
Financial Services	(218)	(1,148)	(1,218)	(7,624)	145,606
Fishing and Fishing Products	(1)	(5)	(0)	(30)	(11,391)
Food Processing and Manufacturing	(109)	2,285	3,589	33,510	289,843
Footwear	(2)	0	(39)	(8)	(2,124)
Forestry	(12)	(24)	(53)	302	(7,363)
Furniture	(29)	693	71	(2,037)	13,298
Hospitality and Tourism	(20)	2,349	3,217	14,663	153,060
Information Technology and Analytical Instruments	93	(538)	6,383	119,555	422,992
Insurance Services	7	(1,047)	(2,153)	(7,923)	77,395
Jewelry and Precious Metals	2	10	77	(12)	(5,384)
Leather and Related Products	(6)	71	(15)	(245)	1,573
Lighting and Electrical Equipment	3	(10)	191	3,694	31,086
Livestock Processing	(432)	497	511	1,566	61,029
Local Commercial Services	(67)	11,924	12,604	148,184	1,070,151
Local Community and Civic Organizations	1,822	21,889	18,667	298,274	937,659
Local Education and Training	1,293	7,350	5,496	105,820	338,908
Local Entertainment and Media	67	(907)	(4,653)	(14,280)	(287,001)
Local Federal Government Services	210	848	(10,265)	(14,529)	(678)
Local Financial Services	(7)	2,470	2,743	35,643	629,431
Local Food and Beverage Processing and Distribution	977	10,346	5,050	81,345	623,137
Local Government Services	435	5,780	5,015	60,304	193,285
Local Health Services	1,125	22,601	38,638	379,665	2,285,570
Local Hospitality Establishments	471	26,559	27,776	277,312	1,819,854
Local Household Goods and Services	(941)	3,072	(666)	(362)	148,620
Local Industrial Products and Services	(47)	(1,168)	(414)	(13,006)	(62,578)
Local Logistical Services	187	7,634	7,712	144,221	946,452
Local Motor Vehicle Products and Services	579	7,255	989	42,546	519,935
Local Personal Services (Non-Medical)	704	8,986	11,118	132,591	925,551
Local Real Estate, Construction, and Development	65	36,097	30,715	340,217	2,923,362
Local Retailing of Clothing and General Merchandise	(252)	(761)	(5,727)	(44,396)	(235,200)
Local State Government Services	143	1,215	1,679	26,230	(56,927)
Local Utilities	(75)	392	(1,753)	(13,857)	(87,819)
Marketing, Design, and Publishing	61	1,336	(31)	81,483	299,840
Medical Devices	3	(1,044)	417	3,213	34,305
Metal Mining	126	1	2	91	(97)
Metalworking Technology	8	107	(29)	(4,213)	(20,695)
Music and Sound Recording	1	119	58	5,250	17,382
Nonmetal Mining	(28)	112	19	667	13,796
Oil and Gas Production and Transportation	(87)	54	(129)	(16,687)	(257,495)
Paper and Packaging	(11)	(18)	100	(309)	(7,891)
Performing Arts	15	1,355	2,059	46,428	201,978
Plastics	(8)	1,152	257	1,425	88,254
Printing Services	74	(248)	(448)	(10,700)	(86,867)
Production Technology and Heavy Machinery	53	68	(389)	2,123	36,667
Recreational and Small Electric Goods	(14)	(162)	(659)	(3,161)	17,375
Textile Manufacturing	(1)	(73)	(186)	(4,850)	(40,404)
Tobacco	0	0	11	218	(2,853)
Trailers, Motor Homes, and Appliances	(1)	467	(49)	381	40,443
Transportation and Logistics	73	3,990	4,552	52,967	356,764
Upstream Chemical Products	48	51	411	1,865	12,133
Upstream Metal Manufacturing	(1)	67	(55)	(4,984)	(14,770)
Video Production and Distribution	8	225	(56)	14,350	63,031
Vulcanized and Fired Materials	58	126	(253)	(945)	5,568
Water Transportation	18	(69)	1,199	2,401	27,235
Wood Products	19	397	353	5,482	66,188
Cluster Total	6,319	234,175	215,526	2,803,303	19,569,977
Traded Cluster Total	(370)	62,591	70,800	831,380	6,938,265
Local Cluster Total	6,689	171,584	144,725	1,971,923	12,631,712
Total Jobs	4,690	229,937	221,052	2,672,335	18,669,293

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-6
Cluster Job Growth (%) by Region, 2013-23

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	-25.9%	-16.2%	44.6%	5.7%	3.5%
Agricultural Inputs and Services	-7.1%	-8.2%	0.7%	0.0%	2.6%
Apparel	-32.1%	29.9%	14.3%	-44.5%	-27.4%
Automotive	65.9%	7.8%	13.3%	107.5%	17.6%
Biopharmaceuticals	UND	3.6%	48.7%	2.9%	25.0%
Business Services	47.0%	22.9%	28.0%	25.2%	31.9%
Coal Mining	UND		-100.0%	-78.0%	-45.4%
Communications Equipment and Services	-13.8%	-18.7%	-7.3%	5.6%	0.5%
Construction Products and Services	-6.4%	91.9%	24.6%	15.2%	15.3%
Distribution and Electronic Commerce	-10.7%	106.4%	1.4%	13.1%	19.4%
Downstream Chemical Products	111.0%	25.6%	77.6%	12.7%	7.7%
Downstream Metal Products	-18.2%	42.4%	3.0%	0.9%	14.4%
Education and Knowledge Creation	101.3%	-6.8%	17.3%	9.7%	4.0%
Electric Power Generation and Transmission	17.3%	27.1%	-65.6%	4.6%	-6.8%
Environmental Services	2816.0%	64.2%	77.3%	17.1%	29.8%
Financial Services	-55.7%	-23.8%	-5.8%	-3.4%	7.0%
Fishing and Fishing Products	-100.0%	-22.5%	-0.1%	-1.2%	-15.6%
Food Processing and Manufacturing	-25.7%	78.1%	71.5%	22.0%	28.6%
Footwear	-100.0%	4.6%	-65.3%	-0.7%	-11.0%
Forestry	-100.0%	-15.2%	-37.9%	5.5%	-7.1%
Furniture	-63.5%	47.2%	4.3%	-6.2%	3.6%
Hospitality and Tourism	-4.4%	15.9%	6.8%	3.9%	5.0%
Information Technology and Analytical Instruments	7954.5%	-16.4%	30.8%	42.4%	34.0%
Insurance Services	23.0%	-44.9%	-19.1%	-6.4%	5.2%
Jewelry and Precious Metals	139.0%	21.5%	61.4%	-0.3%	-16.4%
Leather and Related Products	-100.0%	33.0%	-3.9%	-5.0%	4.0%
Lighting and Electrical Equipment	UND	-1.2%	9.2%	13.3%	9.7%
Livestock Processing	-29.6%	945.4%	318.6%	7.0%	12.1%
Local Commercial Services	-2.9%	30.6%	12.7%	12.9%	11.7%
Local Community and Civic Organizations	34.4%	75.9%	33.7%	36.8%	18.8%
Local Education and Training	24.3%	13.8%	7.0%	11.6%	3.9%
Local Entertainment and Media	12.2%	-11.6%	-22.6%	-5.7%	-14.9%
Local Federal Government Services	7.2%	7.8%	-6.9%	-3.1%	0.0%
Local Financial Services	-1.0%	30.4%	12.3%	13.2%	21.9%
Local Food and Beverage Processing and Distribution	43.1%	29.3%	8.3%	10.7%	9.6%
Local Government Services	8.5%	13.6%	9.2%	8.8%	3.5%
Local Health Services	26.9%	35.4%	28.5%	23.4%	13.6%
Local Hospitality Establishments	12.6%	40.1%	21.2%	19.9%	15.3%
Local Household Goods and Services	-48.3%	14.3%	-2.0%	-0.1%	5.3%
Local Industrial Products and Services	-30.8%	-30.1%	-7.9%	-15.7%	-8.8%
Local Logistical Services	16.5%	70.9%	46.2%	57.1%	41.0%
Local Motor Vehicle Products and Services	31.2%	28.0%	2.4%	9.2%	11.8%
Local Personal Services (Non-Medical)	42.6%	35.8%	25.1%	26.1%	21.3%
Local Real Estate, Construction, and Development	1.9%	47.0%	25.7%	27.0%	27.6%
Local Retailing of Clothing and General Merchandise	-6.2%	-2.5%	-11.3%	-8.0%	-4.8%
Local State Government Services	5.1%	20.3%	24.8%	12.7%	-2.5%
Local Utilities	-31.2%	12.2%	-14.5%	-11.7%	-7.4%
Marketing, Design, and Publishing	50.0%	25.5%	-0.1%	28.6%	17.5%
Medical Devices	28.0%	-31.0%	6.0%	5.6%	9.7%
Metal Mining	80.1%	UND	75.7%	11.8%	-0.2%
Metalworking Technology	390.9%	9.9%	-1.2%	-9.5%	-4.3%
Music and Sound Recording	38.8%	118.7%	17.4%	81.5%	65.5%
Nonmetal Mining	-36.7%	39.7%	6.2%	14.6%	14.8%
Oil and Gas Production and Transportation	-87.3%	23.6%	-29.4%	-41.0%	-31.1%
Paper and Packaging	-100.0%	-2.3%	12.2%	-1.5%	-2.1%
Performing Arts	42.2%	61.8%	32.5%	44.5%	36.0%
Plastics	-64.7%	33.5%	8.6%	3.4%	14.8%
Printing Services	1668.0%	-18.8%	-13.7%	-23.2%	-17.6%
Production Technology and Heavy Machinery	138.9%	2.4%	-5.2%	3.5%	3.7%
Recreational and Small Electric Goods	-59.0%	-6.6%	-15.1%	-11.1%	9.1%
Textile Manufacturing	-100.0%	-44.5%	-31.6%	-32.2%	-18.0%
Tobacco			598.2%	476.9%	-20.4%
Trailers, Motor Homes, and Appliances	-46.6%	202.4%	-44.6%	9.8%	30.5%
Transportation and Logistics	11.0%	75.4%	65.0%	31.2%	17.9%
Upstream Chemical Products	UND	117.6%	68.6%	33.7%	7.5%
Upstream Metal Manufacturing	-100.0%	4.7%	-5.3%	-20.4%	-3.6%
Video Production and Distribution	439.5%	48.1%	-3.7%	10.0%	21.4%
Vulcanized and Fired Materials	3254.3%	11.7%	-31.7%	-6.7%	2.2%
Water Transportation	UND	-43.9%	19.0%	8.0%	9.2%
Wood Products	106.4%	23.6%	67.4%	25.6%	18.7%
Cluster Total	8.9%	31.9%	13.3%	15.3%	12.5%
Traded Cluster Total	-1.8%	36.1%	14.5%	13.5%	13.8%
Local Cluster Total	13.5%	30.7%	12.7%	16.3%	11.8%
Total Jobs	6.9%	32.8%	14.0%	15.0%	12.3%

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Note: UND = Undefined

Table E-7
Cluster Projected Job Growth by Region, 2023-33

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	52	(45)	863	6,501	51,857
Agricultural Inputs and Services	(1,658)	(798)	1,539	27,859	90,287
Apparel	20	44	(151)	(11,869)	(15,483)
Automotive	2	(42)	(126)	10,565	(28,015)
Biopharmaceuticals	28	278	1,469	2,314	45,642
Business Services	509	2,029	15,840	211,682	1,990,026
Coal Mining	5	0	0	39	(12,730)
Communications Equipment and Services	3	(104)	(1,058)	10,740	90,052
Construction Products and Services	18	792	(727)	6,126	94,669
Distribution and Electronic Commerce	30	18,374	988	57,798	828,103
Downstream Chemical Products	10	144	200	1,864	23,932
Downstream Metal Products	11	376	151	(125)	41,927
Education and Knowledge Creation	189	107	19,788	112,221	778,583
Electric Power Generation and Transmission	293	81	415	3,286	563
Environmental Services	50	148	291	3,580	28,331
Financial Services	(10)	(349)	(1,161)	(2,793)	231,956
Fishing and Fishing Products	0	(2)	(42)	6	(4,475)
Food Processing and Manufacturing	(23)	1,042	2,023	22,883	201,403
Footwear	0	(2)	(10)	71	165
Forestry	0	35	(30)	712	339
Furniture	(6)	(214)	(105)	(3,886)	(10,196)
Hospitality and Tourism	25	2,509	8,932	63,298	327,011
Information Technology and Analytical Instruments	89	(69)	3,870	71,410	311,589
Insurance Services	4	(90)	(1,258)	6,222	153,466
Jewelry and Precious Metals	0	7	(85)	(416)	(4,256)
Leather and Related Products	0	33	(75)	(603)	1,531
Lighting and Electrical Equipment	1	37	241	6,363	76,104
Livestock Processing	261	327	319	2,875	46,335
Local Commercial Services	165	4,754	14,049	95,600	792,889
Local Community and Civic Organizations	3,109	21,425	23,976	382,187	1,251,250
Local Education and Training	1,336	7,814	7,778	96,416	525,918
Local Entertainment and Media	122	(186)	(2,625)	(2,905)	(62,895)
Local Federal Government Services	551	1,372	5,900	18,091	183,894
Local Financial Services	30	1,631	611	14,657	353,198
Local Food and Beverage Processing and Distribution	516	7,119	3,101	51,777	340,513
Local Government Services	744	9,091	6,882	86,929	400,993
Local Health Services	1,195	21,617	33,757	377,279	2,712,148
Local Hospitality Establishments	504	18,991	25,073	252,207	1,248,976
Local Household Goods and Services	18	1,586	(1,330)	(10,430)	11,813
Local Industrial Products and Services	(9)	188	(165)	(3,038)	27,223
Local Logistical Services	26	4,915	4,655	76,335	544,794
Local Motor Vehicle Products and Services	323	3,929	530	24,904	254,918
Local Personal Services (Non-Medical)	500	6,123	7,501	94,076	553,469
Local Real Estate, Construction, and Development	339	12,319	11,001	110,503	1,069,287
Local Retailing of Clothing and General Merchandise	262	1,048	707	12,595	95,222
Local State Government Services	310	778	1,447	34,266	102,277
Local Utilities	(37)	606	(167)	627	32,315
Marketing, Design, and Publishing	60	1,067	968	46,395	267,852
Medical Devices	(3)	(327)	(52)	5,422	37,428
Metal Mining	51	1	(2)	283	6,873
Metalworking Technology	7	20	80	(2,097)	7,826
Music and Sound Recording	3	80	58	3,096	10,609
Nonmetal Mining	(9)	34	13	171	9,398
Oil and Gas Production and Transportation	6	62	52	(2,429)	23,358
Paper and Packaging	0	3	(83)	(1,679)	(19,709)
Performing Arts	10	748	1,410	26,112	131,493
Plastics	1	817	248	763	46,952
Printing Services	48	(244)	(405)	(7,967)	(44,186)
Production Technology and Heavy Machinery	44	269	(274)	4,061	84,085
Recreational and Small Electric Goods	2	5	(398)	(2,306)	12,033
Textile Manufacturing	0	(7)	(27)	(2,546)	(12,646)
Tobacco	0	0	(4)	110	(1,823)
Trailers, Motor Homes, and Appliances	0	(193)	(9)	(601)	6,928
Transportation and Logistics	10	1,829	1,510	30,493	262,051
Upstream Chemical Products	10	17	305	839	12,235
Upstream Metal Manufacturing	0	(4)	8	(2,047)	2,937
Video Production and Distribution	3	84	49	20,131	55,039
Vulcanized and Fired Materials	35	14	(16)	(466)	5,566
Water Transportation	13	(26)	(765)	1,675	14,651
Wood Products	16	(141)	14	782	24,951
Cluster Total	10,213	153,876	197,462	2,438,989	16,720,818
Traded Cluster Total	212	28,754	54,782	726,916	6,282,614
Local Cluster Total	10,001	125,121	142,680	1,712,073	10,438,203
Total Jobs	9,090	150,382	203,760	2,401,606	16,338,915

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-8
Cluster Projected Job Growth (%) by Region, 2023-33

Cluster	Imperial County	Riverside County	San Diego County	CA	US
Aerospace Vehicles and Defense	55.1%	-5.5%	5.1%	6.0%	8.0%
Agricultural Inputs and Services	-16.9%	-6.7%	14.1%	6.4%	4.8%
Apparel	53.6%	7.5%	-8.0%	-34.2%	-11.8%
Automotive	25.7%	-1.7%	-10.0%	18.5%	-2.6%
Biopharmaceuticals	98.9%	24.4%	16.3%	4.9%	13.1%
Business Services	34.5%	8.2%	13.2%	15.2%	17.7%
Coal Mining	41.3%			67.3%	-27.0%
Communications Equipment and Services	7.2%	-6.8%	-10.0%	9.2%	16.6%
Construction Products and Services	5.7%	13.7%	-18.5%	8.7%	9.6%
Distribution and Electronic Commerce	0.9%	21.0%	1.6%	5.8%	9.1%
Downstream Chemical Products	35.1%	11.4%	13.0%	7.2%	8.4%
Downstream Metal Products	24.7%	13.2%	6.9%	-0.4%	8.6%
Education and Knowledge Creation	19.2%	0.6%	17.1%	12.9%	11.4%
Electric Power Generation and Transmission	65.3%	8.4%	72.6%	17.1%	0.3%
Environmental Services	46.4%	31.1%	22.1%	20.2%	19.3%
Financial Services	-5.9%	-9.5%	-5.9%	-1.3%	10.5%
Fishing and Fishing Products		-13.1%	-25.3%	0.2%	-7.3%
Food Processing and Manufacturing	-7.3%	20.0%	23.5%	12.3%	15.5%
Footwear		-28.5%	-48.8%	6.1%	1.0%
Forestry		26.4%	-34.0%	12.2%	0.3%
Furniture	-36.4%	-9.9%	-6.0%	-12.6%	-2.7%
Hospitality and Tourism	6.0%	14.7%	17.7%	16.1%	10.1%
Information Technology and Analytical Instruments	94.4%	-2.5%	14.3%	17.8%	18.7%
Insurance Services	10.7%	-7.0%	-13.8%	5.4%	9.9%
Jewelry and Precious Metals	14.6%	12.5%	-42.0%	-11.8%	-15.5%
Leather and Related Products		11.5%	-19.8%	-13.1%	3.8%
Lighting and Electrical Equipment	44.3%	4.6%	10.6%	20.3%	21.7%
Livestock Processing	25.4%	59.5%	47.6%	12.0%	8.2%
Local Commercial Services	7.4%	9.3%	12.5%	7.4%	7.8%
Local Community and Civic Organizations	43.6%	42.2%	32.4%	34.5%	21.1%
Local Education and Training	20.2%	12.9%	9.3%	9.4%	5.8%
Local Entertainment and Media	19.7%	-2.7%	-16.5%	-1.2%	-3.8%
Local Federal Government Services	17.6%	11.8%	4.3%	4.0%	3.8%
Local Financial Services	4.4%	15.4%	2.4%	4.8%	10.1%
Local Food and Beverage Processing and Distribution	15.9%	15.6%	4.7%	6.2%	4.8%
Local Government Services	13.4%	18.8%	11.6%	11.6%	7.0%
Local Health Services	22.5%	25.0%	19.4%	18.9%	14.2%
Local Hospitality Establishments	12.0%	20.5%	15.8%	15.1%	9.1%
Local Household Goods and Services	1.8%	6.5%	-4.1%	-2.9%	0.4%
Local Industrial Products and Services	-8.9%	7.0%	-3.4%	-4.3%	4.2%
Local Logistical Services	1.9%	26.7%	19.1%	19.2%	16.7%
Local Motor Vehicle Products and Services	13.3%	11.9%	1.3%	4.9%	5.2%
Local Personal Services (Non-Medical)	21.2%	17.9%	13.5%	14.7%	10.5%
Local Real Estate, Construction, and Development	9.9%	10.9%	7.3%	6.9%	7.9%
Local Retailing of Clothing and General Merchandise	6.9%	3.5%	1.6%	2.5%	2.0%
Local State Government Services	10.5%	10.8%	17.1%	14.7%	4.6%
Local Utilities	-22.4%	16.8%	-1.6%	0.6%	3.0%
Marketing, Design, and Publishing	32.7%	16.2%	4.6%	12.7%	13.3%
Medical Devices	-21.7%	-14.1%	-0.7%	8.9%	9.7%
Metal Mining	18.1%	154.6%	-68.0%	32.9%	13.8%
Metalworking Technology	72.4%	1.7%	3.3%	-5.2%	1.7%
Music and Sound Recording	65.4%	36.4%	14.8%	26.5%	24.2%
Nonmetal Mining	-18.6%	8.8%	4.1%	3.3%	8.8%
Oil and Gas Production and Transportation	43.4%	21.9%	16.9%	-10.1%	4.1%
Paper and Packaging		0.4%	-9.0%	-8.1%	-5.3%
Performing Arts	20.1%	21.1%	16.8%	17.3%	17.2%
Plastics	34.1%	17.8%	7.7%	1.8%	6.9%
Printing Services	61.5%	-22.8%	-14.3%	-22.5%	-10.9%
Production Technology and Heavy Machinery	48.0%	9.3%	-3.9%	6.5%	8.3%
Recreational and Small Electric Goods	20.0%	0.2%	-10.7%	-9.1%	5.8%
Textile Manufacturing		-8.0%	-6.7%	-24.9%	-6.9%
Tobacco		350.9%	-29.1%	41.9%	-16.3%
Trailers, Motor Homes, and Appliances	37.4%	-27.7%	-14.4%	-14.1%	4.0%
Transportation and Logistics	1.3%	19.7%	13.1%	13.7%	11.2%
Upstream Chemical Products	19.7%	17.8%	30.2%	11.3%	7.0%
Upstream Metal Manufacturing		-0.3%	0.8%	-10.5%	0.7%
Video Production and Distribution	26.2%	12.1%	3.3%	12.7%	15.4%
Vulcanized and Fired Materials	59.1%	1.2%	-3.0%	-3.5%	2.2%
Water Transportation	67.9%	-29.4%	-10.2%	5.2%	4.5%
Wood Products	41.2%	-6.8%	1.6%	2.9%	5.9%
Cluster Total	13.3%	15.9%	10.7%	11.6%	9.5%
Traded Cluster Total	1.0%	12.2%	9.8%	10.4%	11.0%
Local Cluster Total	17.8%	17.1%	11.1%	12.2%	8.7%
Total Jobs	12.5%	16.1%	11.3%	11.7%	9.6%

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-9
Shift Share Analysis, 2013-23
Imperial County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(11)	16	(38)	(33)
Agricultural Inputs and Services	(1,024)	1,295	(1,025)	(753)
Apparel	(22)	7	(3)	(18)
Automotive	0	1	3	4
Biopharmaceuticals	0	0	UND	28
Business Services	197	123	152	472
Coal Mining	0	0	UND	12
Communications Equipment and Services	(5)	5	(6)	(6)
Construction Products and Services	10	41	(73)	(21)
Distribution and Electronic Commerce	278	476	(1,171)	(417)
Downstream Chemical Products	(1)	2	14	15
Downstream Metal Products	1	7	(18)	(10)
Education and Knowledge Creation	(40)	60	474	494
Electric Power Generation and Transmission	(73)	47	92	66
Environmental Services	1	0	104	105
Financial Services	(21)	48	(246)	(218)
Fishing and Fishing Products	(0)	0	(0)	(1)
Food Processing and Manufacturing	69	52	(231)	(109)
Footwear	(0)	0	(1)	(2)
Forestry	(2)	1	(11)	(12)
Furniture	(4)	6	(30)	(29)
Hospitality and Tourism	(32)	55	(42)	(20)
Information Technology and Analytical Instruments	0	0	93	93
Insurance Services	(2)	4	6	7
Jewelry and Precious Metals	(0)	0	2	2
Leather and Related Products	(1)	1	(6)	(6)
Lighting and Electrical Equipment	0	0	UND	3
Livestock Processing	(3)	179	(608)	(432)
Local Commercial Services	(12)	283	(337)	(67)
Local Community and Civic Organizations	346	651	825	1,822
Local Education and Training	(444)	652	1,085	1,293
Local Entertainment and Media	(150)	68	149	67
Local Federal Government Services	(359)	359	210	210
Local Financial Services	66	84	(157)	(7)
Local Food and Beverage Processing and Distribution	(61)	279	759	977
Local Government Services	(449)	629	255	435
Local Health Services	54	514	557	1,125
Local Hospitality Establishments	114	459	(101)	471
Local Household Goods and Services	(136)	239	(1,045)	(941)
Local Industrial Products and Services	(32)	19	(33)	(47)
Local Logistical Services	326	140	(279)	187
Local Motor Vehicle Products and Services	(10)	228	361	579
Local Personal Services (Non-Medical)	150	203	351	704
Local Real Estate, Construction, and Development	515	413	(863)	65
Local Retailing of Clothing and General Merchandise	(688)	496	(60)	(252)
Local State Government Services	(417)	346	213	143
Local Utilities	(47)	29	(57)	(75)
Marketing, Design, and Publishing	6	15	40	61
Medical Devices	(0)	1	2	3
Metal Mining	(20)	19	126	126
Metalworking Technology	(0)	0	8	8
Music and Sound Recording	2	0	(1)	1
Nonmetal Mining	2	9	(40)	(28)
Oil and Gas Production and Transportation	(43)	12	(56)	(87)
Paper and Packaging	(2)	1	(11)	(11)
Performing Arts	8	4	2	15
Plastics	0	2	(10)	(8)
Printing Services	(1)	1	75	74
Production Technology and Heavy Machinery	(3)	5	51	53
Recreational and Small Electric Goods	(1)	3	(17)	(14)
Textile Manufacturing	(0)	0	(1)	(1)
Tobacco	0	0	0	0
Trailers, Motor Homes, and Appliances	0	0	(1)	(1)
Transportation and Logistics	38	81	(46)	73
Upstream Chemical Products	0	0	UND	48
Upstream Metal Manufacturing	(0)	0	(1)	(1)
Video Production and Distribution	0	0	8	8
Vulcanized and Fired Materials	(0)	0	58	58
Water Transportation	0	0	UND	18
Wood Products	1	2	16	19

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Note: UND = Undefined

Table E-10
Shift Share Analysis, 2013-23
Riverside County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(85)	120	(193)	(158)
Agricultural Inputs and Services	(1,260)	1,595	(1,402)	(1,068)
Apparel	(178)	55	257	134
Automotive	124	286	(229)	181
Biopharmaceuticals	140	135	(236)	39
Business Services	3,961	2,484	(1,814)	4,630
Coal Mining	0	0	0	0
Communications Equipment and Services	(224)	233	(365)	(356)
Construction Products and Services	90	370	2,312	2,772
Distribution and Electronic Commerce	3,036	5,203	36,845	45,084
Downstream Chemical Products	(46)	124	181	258
Downstream Metal Products	43	247	562	852
Education and Knowledge Creation	(1,598)	2,384	(2,101)	(1,314)
Electric Power Generation and Transmission	(145)	93	258	206
Environmental Services	51	36	100	186
Financial Services	(253)	592	(1,486)	(1,148)
Fishing and Fishing Products	(6)	3	(1)	(5)
Food Processing and Manufacturing	479	359	1,447	2,285
Footwear	(2)	1	1	0
Forestry	(30)	19	(13)	(24)
Furniture	(127)	180	640	693
Hospitality and Tourism	(1,078)	1,809	1,618	2,349
Information Technology and Analytical Instruments	712	402	(1,652)	(538)
Insurance Services	(164)	287	(1,170)	(1,047)
Jewelry and Precious Metals	(13)	6	18	10
Leather and Related Products	(18)	26	62	71
Lighting and Electrical Equipment	(21)	99	(89)	(10)
Livestock Processing	(0)	6	490	497
Local Commercial Services	(208)	4,786	7,346	11,924
Local Community and Civic Organizations	1,880	3,539	16,470	21,889
Local Education and Training	(4,440)	6,516	5,274	7,350
Local Entertainment and Media	(2,127)	960	260	(907)
Local Federal Government Services	(1,328)	1,327	850	848
Local Financial Services	779	997	694	2,470
Local Food and Beverage Processing and Distribution	(948)	4,337	6,957	10,346
Local Government Services	(3,733)	5,232	4,281	5,780
Local Health Services	827	7,847	13,927	22,601
Local Hospitality Establishments	2,012	8,122	16,425	26,559
Local Household Goods and Services	(1,496)	2,636	1,933	3,072
Local Industrial Products and Services	(818)	476	(826)	(1,168)
Local Logistical Services	3,090	1,322	3,222	7,634
Local Motor Vehicle Products and Services	(136)	3,179	4,212	7,255
Local Personal Services (Non-Medical)	2,277	3,085	3,624	8,986
Local Real Estate, Construction, and Development	11,765	9,432	14,900	36,097
Local Retailing of Clothing and General Merchandise	(5,277)	3,804	712	(761)
Local State Government Services	(885)	735	1,365	1,215
Local Utilities	(633)	394	631	392
Marketing, Design, and Publishing	276	643	417	1,336
Medical Devices	(85)	413	(1,372)	(1,044)
Metal Mining	0	0	UND	1
Metalworking Technology	(179)	132	153	107
Music and Sound Recording	53	12	53	119
Nonmetal Mining	7	35	70	112
Oil and Gas Production and Transportation	(99)	28	125	54
Paper and Packaging	(113)	97	(2)	(18)
Performing Arts	520	269	565	1,355
Plastics	88	422	642	1,152
Printing Services	(394)	162	(15)	(248)
Production Technology and Heavy Machinery	(241)	347	(38)	68
Recreational and Small Electric Goods	(78)	300	(383)	(162)
Textile Manufacturing	(50)	20	(44)	(73)
Tobacco	0	0	0	0
Trailers, Motor Homes, and Appliances	42	28	396	467
Transportation and Logistics	300	650	3,041	3,990
Upstream Chemical Products	(2)	5	48	51
Upstream Metal Manufacturing	(226)	175	119	67
Video Production and Distribution	43	57	125	225
Vulcanized and Fired Materials	(108)	132	102	126
Water Transportation	(5)	19	(83)	(69)
Wood Products	108	207	83	397

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Note: UND = Undefined

Table E-11
Shift Share Analysis, 2013-23
San Diego County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(1,029)	1,444	4,830	5,245
Agricultural Inputs and Services	(1,053)	1,332	(207)	72
Apparel	(655)	203	689	237
Automotive	59	137	(47)	149
Biopharmaceuticals	770	743	1,437	2,951
Business Services	18,401	11,539	(3,601)	26,340
Coal Mining	(2)	0	(2)	(3)
Communications Equipment and Services	(1,341)	1,395	(883)	(829)
Construction Products and Services	94	388	294	776
Distribution and Electronic Commerce	4,339	7,436	(10,909)	865
Downstream Chemical Products	(40)	107	606	673
Downstream Metal Products	45	260	(241)	64
Education and Knowledge Creation	(8,095)	12,078	13,081	17,064
Electric Power Generation and Transmission	(317)	204	(979)	(1,092)
Environmental Services	131	91	354	576
Financial Services	(1,102)	2,573	(2,690)	(1,218)
Fishing and Fishing Products	(46)	20	26	(0)
Food Processing and Manufacturing	821	616	2,151	3,589
Footwear	(14)	7	(33)	(39)
Forestry	(27)	17	(43)	(53)
Furniture	(146)	205	11	71
Hospitality and Tourism	(3,454)	5,796	874	3,217
Information Technology and Analytical Instruments	4,507	2,545	(669)	6,383
Insurance Services	(791)	1,381	(2,743)	(2,153)
Jewelry and Precious Metals	(36)	15	98	77
Leather and Related Products	(32)	48	(31)	(15)
Lighting and Electrical Equipment	(53)	256	(12)	191
Livestock Processing	(0)	20	491	511
Local Commercial Services	(531)	12,216	920	12,604
Local Community and Civic Organizations	3,609	6,793	8,265	18,667
Local Education and Training	(6,531)	9,584	2,442	5,496
Local Entertainment and Media	(5,595)	2,525	(1,583)	(4,653)
Local Federal Government Services	(18,294)	18,273	(10,245)	(10,265)
Local Financial Services	2,135	2,733	(2,125)	2,743
Local Food and Beverage Processing and Distribution	(1,639)	7,497	(808)	5,050
Local Government Services	(4,751)	6,658	3,108	5,015
Local Health Services	1,755	16,654	20,230	38,638
Local Hospitality Establishments	3,979	16,062	7,735	27,776
Local Household Goods and Services	(2,296)	4,044	(2,415)	(666)
Local Industrial Products and Services	(1,109)	646	49	(414)
Local Logistical Services	4,787	2,047	878	7,712
Local Motor Vehicle Products and Services	(216)	5,065	(3,860)	989
Local Personal Services (Non-Medical)	4,010	5,432	1,676	11,118
Local Real Estate, Construction, and Development	18,300	14,671	(2,256)	30,715
Local Retailing of Clothing and General Merchandise	(8,643)	6,231	(3,314)	(5,727)
Local State Government Services	(999)	830	1,848	1,679
Local Utilities	(2,385)	1,485	(852)	(1,753)
Marketing, Design, and Publishing	1,117	2,606	(3,754)	(31)
Medical Devices	(177)	856	(262)	417
Metal Mining	(0)	0	2	2
Metalworking Technology	(407)	301	77	(29)
Music and Sound Recording	177	41	(159)	58
Nonmetal Mining	8	37	(26)	19
Oil and Gas Production and Transportation	(190)	54	7	(129)
Paper and Packaging	(118)	101	117	100
Performing Arts	1,501	777	(219)	2,059
Plastics	76	365	(184)	257
Printing Services	(980)	402	130	(448)
Production Technology and Heavy Machinery	(636)	915	(667)	(389)
Recreational and Small Electric Goods	(140)	537	(1,056)	(659)
Textile Manufacturing	(178)	72	(80)	(186)
Tobacco	(1)	0	12	11
Trailers, Motor Homes, and Appliances	20	14	(83)	(49)
Transportation and Logistics	396	859	3,297	4,552
Upstream Chemical Products	(29)	74	366	411
Upstream Metal Manufacturing	(164)	127	(18)	(55)
Video Production and Distribution	139	186	(381)	(56)
Vulcanized and Fired Materials	(80)	98	(271)	(253)
Water Transportation	(197)	776	619	1,199
Wood Products	34	64	255	353

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Table E-12
Shift Share Analysis, 2013-23
California

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(9,016)	12,654	2,279	5,918
Agricultural Inputs and Services	(42,435)	53,684	(11,208)	41
Apparel	(24,797)	7,675	(10,666)	(27,788)
Automotive	1,467	3,381	24,763	29,610
Biopharmaceuticals	5,818	5,614	(10,089)	1,342
Business Services	217,801	136,577	(74,168)	280,211
Coal Mining	(151)	32	(85)	(204)
Communications Equipment and Services	(13,055)	13,582	5,617	6,144
Construction Products and Services	1,828	7,537	(10)	9,355
Distribution and Electronic Commerce	63,142	108,210	(56,157)	115,195
Downstream Chemical Products	(1,053)	2,833	1,143	2,923
Downstream Metal Products	638	3,676	(4,053)	261
Education and Knowledge Creation	(65,046)	97,050	45,032	77,037
Electric Power Generation and Transmission	(3,500)	2,254	2,098	852
Environmental Services	2,648	1,854	(1,922)	2,580
Financial Services	(11,878)	27,744	(23,490)	(7,624)
Fishing and Fishing Products	(689)	304	356	(30)
Food Processing and Manufacturing	24,917	18,698	(10,105)	33,510
Footwear	(274)	145	122	(8)
Forestry	(1,070)	679	692	302
Furniture	(2,854)	4,029	(3,212)	(2,037)
Hospitality and Tourism	(27,726)	46,526	(4,137)	14,663
Information Technology and Analytical Instruments	61,288	34,600	23,668	119,555
Insurance Services	(8,723)	15,228	(14,428)	(7,923)
Jewelry and Precious Metals	(1,013)	434	567	(12)
Leather and Related Products	(399)	595	(441)	(245)
Lighting and Electrical Equipment	(710)	3,402	1,002	3,694
Livestock Processing	(44)	2,755	(1,145)	1,566
Local Commercial Services	(6,144)	141,235	13,093	148,184
Local Community and Civic Organizations	52,828	99,450	145,996	298,274
Local Education and Training	(76,504)	112,274	70,049	105,820
Local Entertainment and Media	(68,076)	30,727	23,069	(14,280)
Local Federal Government Services	(56,850)	56,785	(14,465)	(14,529)
Local Financial Services	25,919	33,182	(23,458)	35,643
Local Food and Beverage Processing and Distribution	(20,322)	92,960	8,707	81,345
Local Government Services	(60,220)	84,404	36,120	60,304
Local Health Services	20,979	199,069	159,617	379,665
Local Hospitality Establishments	42,279	170,658	64,375	277,312
Local Household Goods and Services	(24,681)	43,481	(19,162)	(362)
Local Industrial Products and Services	(17,491)	10,181	(5,696)	(13,006)
Local Logistical Services	72,512	31,016	40,693	144,221
Local Motor Vehicle Products and Services	(2,423)	56,726	(11,757)	42,546
Local Personal Services (Non-Medical)	46,007	62,322	24,262	132,591
Local Real Estate, Construction, and Development	193,313	154,981	(8,077)	340,217
Local Retailing of Clothing and General Merchandise	(94,796)	68,336	(17,936)	(44,396)
Local State Government Services	(30,614)	25,426	31,418	26,230
Local Utilities	(23,278)	14,494	(5,073)	(13,857)
Marketing, Design, and Publishing	15,002	35,013	31,468	81,483
Medical Devices	(1,467)	7,100	(2,420)	3,213
Metal Mining	(96)	94	93	91
Metalworking Technology	(7,376)	5,462	(2,299)	(4,213)
Music and Sound Recording	3,431	791	1,027	5,250
Nonmetal Mining	118	563	(14)	667
Oil and Gas Production and Transportation	(17,666)	4,996	(4,017)	(16,687)
Paper and Packaging	(3,018)	2,580	129	(309)
Performing Arts	24,725	12,798	8,906	46,428
Plastics	1,068	5,107	(4,751)	1,425
Printing Services	(13,807)	5,665	(2,558)	(10,700)
Production Technology and Heavy Machinery	(5,158)	7,413	(132)	2,123
Recreational and Small Electric Goods	(912)	3,494	(5,744)	(3,161)
Textile Manufacturing	(4,570)	1,851	(2,130)	(4,850)
Tobacco	(15)	6	227	218
Trailers, Motor Homes, and Appliances	707	476	(801)	381
Transportation and Logistics	9,600	20,836	22,531	52,967
Upstream Chemical Products	(265)	679	1,452	1,865
Upstream Metal Manufacturing	(3,886)	3,004	(4,102)	(4,984)
Video Production and Distribution	13,225	17,703	(16,577)	14,350
Vulcanized and Fired Materials	(1,429)	1,743	(1,259)	(945)
Water Transportation	(929)	3,669	(339)	2,401
Wood Products	1,375	2,630	1,477	5,482

Source: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School; EMSI; TNDG.

Appendix F – NAICS Component Industries by Cluster

Table F-1

**Component Industries for Clusters
U.S. Cluster Mapping Project / EMSI**

NAICS 2022	Industry Name	Traded vs. Local	Cluster
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	Traded	Aerospace Vehicles and Defense
336411	Aircraft Manufacturing	Traded	Aerospace Vehicles and Defense
336412	Aircraft Engine and Engine Parts Manufacturing	Traded	Aerospace Vehicles and Defense
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	Traded	Aerospace Vehicles and Defense
336414	Guided Missile and Space Vehicle Manufacturing	Traded	Aerospace Vehicles and Defense
336415	Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing	Traded	Aerospace Vehicles and Defense
336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing	Traded	Aerospace Vehicles and Defense
111000	Crop Production	Traded	Agricultural Inputs and Services
112000	Animal Production	Traded	Agricultural Inputs and Services
115111	Cotton Ginning	Traded	Agricultural Inputs and Services
115112	Soil Preparation, Planting, and Cultivating	Traded	Agricultural Inputs and Services
115113	Crop Harvesting, Primarily by Machine	Traded	Agricultural Inputs and Services
115114	Postharvest Crop Activities (except Cotton Ginning)	Traded	Agricultural Inputs and Services
115115	Farm Labor Contractors and Crew Leaders	Traded	Agricultural Inputs and Services
115116	Farm Management Services	Traded	Agricultural Inputs and Services
115210	Support Activities for Animal Production	Traded	Agricultural Inputs and Services
325311	Nitrogenous Fertilizer Manufacturing	Traded	Agricultural Inputs and Services
325314	Fertilizer (Mixing Only) Manufacturing	Traded	Agricultural Inputs and Services
325315	Compost Manufacturing	Traded	Agricultural Inputs and Services
314999	All Other Miscellaneous Textile Product Mills	Traded	Apparel
315210	Cut and Sew Apparel Contractors	Traded	Apparel
315250	Cut and Sew Apparel Manufacturing (except Contractors)	Traded	Apparel
315990	Apparel Accessories and Other Apparel Manufacturing	Traded	Apparel
331511	Iron Foundries	Traded	Automotive
331512	Steel Investment Foundries	Traded	Automotive
331513	Steel Foundries (except Investment)	Traded	Automotive
331523	Nonferrous Metal Die-Casting Foundries	Traded	Automotive
331524	Aluminum Foundries (except Die-Casting)	Traded	Automotive
331529	Other Nonferrous Metal Foundries (except Die-Casting)	Traded	Automotive
332114	Custom Roll Forming	Traded	Automotive
336110	Automobile and Light Duty Motor Vehicle Manufacturing	Traded	Automotive
336120	Heavy Duty Truck Manufacturing	Traded	Automotive
336211	Motor Vehicle Body Manufacturing	Traded	Automotive
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	Traded	Automotive
336320	Motor Vehicle Electrical and Electronic Equipment Manufacturing	Traded	Automotive
336330	Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing	Traded	Automotive
336340	Motor Vehicle Brake System Manufacturing	Traded	Automotive

NAICS 2022	Industry Name	Traded vs. Local	Cluster
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing	Traded	Automotive
336360	Motor Vehicle Seating and Interior Trim Manufacturing	Traded	Automotive
336370	Motor Vehicle Metal Stamping	Traded	Automotive
336390	Other Motor Vehicle Parts Manufacturing	Traded	Automotive
336992	Military Armored Vehicle, Tank, and Tank Component Manufacturing	Traded	Automotive
336999	All Other Transportation Equipment Manufacturing	Traded	Automotive
325411	Medicinal and Botanical Manufacturing	Traded	Biopharmaceuticals
325412	Pharmaceutical Preparation Manufacturing	Traded	Biopharmaceuticals
325413	In-Vitro Diagnostic Substance Manufacturing	Traded	Biopharmaceuticals
325414	Biological Product (except Diagnostic) Manufacturing	Traded	Biopharmaceuticals
485310	Taxi Service	Traded	Business Services
485320	Limousine Service	Traded	Business Services
485999	All Other Transit and Ground Passenger Transportation	Traded	Business Services
518210	Data Processing, Hosting, and Related Services	Traded	Business Services
532112	Passenger Car Leasing	Traded	Business Services
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	Traded	Business Services
541199	All Other Legal Services	Traded	Business Services
541214	Payroll Services	Traded	Business Services
541310	Architectural Services	Traded	Business Services
541320	Landscape Architectural Services	Traded	Business Services
541330	Engineering Services	Traded	Business Services
541340	Drafting Services	Traded	Business Services
541511	Custom Computer Programming Services	Traded	Business Services
541512	Computer Systems Design Services	Traded	Business Services
541513	Computer Facilities Management Services	Traded	Business Services
541519	Other Computer Related Services	Traded	Business Services
541611	Administrative Management and General Management Consulting Services	Traded	Business Services
541612	Human Resources Consulting Services	Traded	Business Services
541614	Process, Physical Distribution, and Logistics Consulting Services	Traded	Business Services
541618	Other Management Consulting Services	Traded	Business Services
541690	Other Scientific and Technical Consulting Services	Traded	Business Services
541930	Translation and Interpretation Services	Traded	Business Services
541990	All Other Professional, Scientific, and Technical Services	Traded	Business Services
551111	Offices of Bank Holding Companies	Traded	Business Services
551112	Offices of Other Holding Companies	Traded	Business Services
551114	Corporate, Subsidiary, and Regional Managing Offices	Traded	Business Services
561210	Facilities Support Services	Traded	Business Services
561311	Employment Placement Agencies	Traded	Business Services
561312	Executive Search Services	Traded	Business Services
561330	Professional Employer Organizations	Traded	Business Services
561421	Telephone Answering Services	Traded	Business Services
561422	Telemarketing Bureaus and Other Contact Centers	Traded	Business Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
561920	Convention and Trade Show Organizers	Traded	Business Services
212114	Surface Coal Mining	Traded	Coal Mining
212115	Underground Coal Mining	Traded	Coal Mining
213113	Support Activities for Coal Mining	Traded	Coal Mining
334210	Telephone Apparatus Manufacturing	Traded	Communications Equipment and Services
334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	Traded	Communications Equipment and Services
334290	Other Communications Equipment Manufacturing	Traded	Communications Equipment and Services
335910	Battery Manufacturing	Traded	Communications Equipment and Services
516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	Traded	Communications Equipment and Services
517112	Wireless Telecommunications Carriers (except Satellite)	Traded	Communications Equipment and Services
517410	Satellite Telecommunications	Traded	Communications Equipment and Services
517810	All Other Telecommunications	Traded	Communications Equipment and Services
221310	Water Supply and Irrigation Systems	Traded	Construction Products and Services
221330	Steam and Air-Conditioning Supply	Traded	Construction Products and Services
236210	Industrial Building Construction	Traded	Construction Products and Services
237120	Oil and Gas Pipeline and Related Structures Construction	Traded	Construction Products and Services
237130	Power and Communication Line and Related Structures Construction	Traded	Construction Products and Services
237990	Other Heavy and Civil Engineering Construction	Traded	Construction Products and Services
324121	Asphalt Paving Mixture and Block Manufacturing	Traded	Construction Products and Services
324122	Asphalt Shingle and Coating Materials Manufacturing	Traded	Construction Products and Services
327310	Cement Manufacturing	Traded	Construction Products and Services
327331	Concrete Block and Brick Manufacturing	Traded	Construction Products and Services
327332	Concrete Pipe Manufacturing	Traded	Construction Products and Services
327410	Lime Manufacturing	Traded	Construction Products and Services
327420	Gypsum Product Manufacturing	Traded	Construction Products and Services
327991	Cut Stone and Stone Product Manufacturing	Traded	Construction Products and Services
327993	Mineral Wool Manufacturing	Traded	Construction Products and Services
327999	All Other Miscellaneous Nonmetallic Mineral Product Manufacturing	Traded	Construction Products and Services
332410	Power Boiler and Heat Exchanger Manufacturing	Traded	Construction Products and Services
332420	Metal Tank (Heavy Gauge) Manufacturing	Traded	Construction Products and Services
332913	Plumbing Fixture Fitting and Trim Manufacturing	Traded	Construction Products and Services
332996	Fabricated Pipe and Pipe Fitting Manufacturing	Traded	Construction Products and Services
423210	Furniture Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423220	Home Furnishing Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423410	Photographic Equipment and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423420	Office Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423440	Other Commercial Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423460	Ophthalmic Goods Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423490	Other Professional Equipment and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423510	Metal Service Centers and Other Metal Merchant Wholesalers	Traded	Distribution and Electronic Commerce

NAICS 2022	Industry Name	Traded vs. Local	Cluster
423520	Coal and Other Mineral and Ore Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423620	Household Appliances, Electric Housewares, and Consumer Electronics Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423690	Other Electronic Parts and Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423830	Industrial Machinery and Equipment Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423840	Industrial Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423850	Service Establishment Equipment and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423860	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424110	Printing and Writing Paper Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424120	Stationery and Office Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424130	Industrial and Personal Service Paper Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424210	Drugs and Druggists' Sundries Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424340	Footwear Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424350	Clothing and Clothing Accessories Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424440	Poultry and Poultry Product Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424460	Fish and Seafood Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424470	Meat and Meat Product Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424480	Fresh Fruit and Vegetable Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424590	Other Farm Product Raw Material Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424610	Plastics Materials and Basic Forms and Shapes Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424690	Other Chemical and Allied Products Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424710	Petroleum Bulk Stations and Terminals	Traded	Distribution and Electronic Commerce
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	Traded	Distribution and Electronic Commerce
424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424910	Farm Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424920	Book, Periodical, and Newspaper Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424940	Tobacco and Tobacco Product Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424950	Paint, Varnish, and Supplies Merchant Wholesalers	Traded	Distribution and Electronic Commerce
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	Traded	Distribution and Electronic Commerce
425120	Wholesale Trade Agents and Brokers	Traded	Distribution and Electronic Commerce
455211	Warehouse Clubs and Supercenters	Traded	Distribution and Electronic Commerce
456110	Pharmacies and Drug Retailers	Traded	Distribution and Electronic Commerce
459999	All Other Miscellaneous Retailers	Traded	Distribution and Electronic Commerce
493110	General Warehousing and Storage	Traded	Distribution and Electronic Commerce
493120	Refrigerated Warehousing and Storage	Traded	Distribution and Electronic Commerce

NAICS 2022	Industry Name	Traded vs. Local	Cluster
493130	Farm Product Warehousing and Storage	Traded	Distribution and Electronic Commerce
493190	Other Warehousing and Storage	Traded	Distribution and Electronic Commerce
532411	Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing	Traded	Distribution and Electronic Commerce
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	Traded	Distribution and Electronic Commerce
532420	Office Machinery and Equipment Rental and Leasing	Traded	Distribution and Electronic Commerce
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing	Traded	Distribution and Electronic Commerce
561499	All Other Business Support Services	Traded	Distribution and Electronic Commerce
561910	Packaging and Labeling Services	Traded	Distribution and Electronic Commerce
324191	Petroleum Lubricating Oil and Grease Manufacturing	Traded	Downstream Chemical Products
325130	Synthetic Dye and Pigment Manufacturing	Traded	Downstream Chemical Products
325510	Paint and Coating Manufacturing	Traded	Downstream Chemical Products
325520	Adhesive Manufacturing	Traded	Downstream Chemical Products
325611	Soap and Other Detergent Manufacturing	Traded	Downstream Chemical Products
325612	Polish and Other Sanitation Good Manufacturing	Traded	Downstream Chemical Products
325613	Surface Active Agent Manufacturing	Traded	Downstream Chemical Products
325620	Toilet Preparation Manufacturing	Traded	Downstream Chemical Products
325920	Explosives Manufacturing	Traded	Downstream Chemical Products
325991	Custom Compounding of Purchased Resins	Traded	Downstream Chemical Products
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	Traded	Downstream Chemical Products
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	Traded	Downstream Chemical Products
332215	Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing	Traded	Downstream Metal Products
332216	Saw Blade and Handtool Manufacturing	Traded	Downstream Metal Products
332311	Prefabricated Metal Building and Component Manufacturing	Traded	Downstream Metal Products
332312	Fabricated Structural Metal Manufacturing	Traded	Downstream Metal Products
332321	Metal Window and Door Manufacturing	Traded	Downstream Metal Products
332323	Ornamental and Architectural Metal Work Manufacturing	Traded	Downstream Metal Products
332431	Metal Can Manufacturing	Traded	Downstream Metal Products
332439	Other Metal Container Manufacturing	Traded	Downstream Metal Products
332510	Hardware Manufacturing	Traded	Downstream Metal Products
332992	Small Arms Ammunition Manufacturing	Traded	Downstream Metal Products
332993	Ammunition (except Small Arms) Manufacturing	Traded	Downstream Metal Products
332994	Small Arms, Ordnance, and Ordnance Accessories Manufacturing	Traded	Downstream Metal Products
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	Traded	Downstream Metal Products
541713	Research and Development in Nanotechnology	Traded	Education and Knowledge Creation
541714	Research and Development in Biotechnology (except Nanobiotechnology)	Traded	Education and Knowledge Creation
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	Traded	Education and Knowledge Creation
541720	Research and Development in the Social Sciences and Humanities	Traded	Education and Knowledge Creation
611210	Junior Colleges	Traded	Education and Knowledge Creation
611310	Colleges, Universities, and Professional Schools	Traded	Education and Knowledge Creation
611410	Business and Secretarial Schools	Traded	Education and Knowledge Creation
611420	Computer Training	Traded	Education and Knowledge Creation
611430	Professional and Management Development Training	Traded	Education and Knowledge Creation

NAICS 2022	Industry Name	Traded vs. Local	Cluster
611512	Flight Training	Traded	Education and Knowledge Creation
611513	Apprenticeship Training	Traded	Education and Knowledge Creation
611630	Language Schools	Traded	Education and Knowledge Creation
611691	Exam Preparation and Tutoring	Traded	Education and Knowledge Creation
611699	All Other Miscellaneous Schools and Instruction	Traded	Education and Knowledge Creation
611710	Educational Support Services	Traded	Education and Knowledge Creation
813920	Professional Organizations	Traded	Education and Knowledge Creation
902612	Colleges, Universities, and Professional Schools (State Government)	Traded	Education and Knowledge Creation
902619	All Other Schools and Educational Support Services (State Government)	Traded	Education and Knowledge Creation
903612	Colleges, Universities, and Professional Schools (Local Government)	Traded	Education and Knowledge Creation
903619	All Other Schools and Educational Support Services (Local Government)	Traded	Education and Knowledge Creation
221111	Hydroelectric Power Generation	Traded	Electric Power Generation and Transmission
221112	Fossil Fuel Electric Power Generation	Traded	Electric Power Generation and Transmission
221113	Nuclear Electric Power Generation	Traded	Electric Power Generation and Transmission
221114	Solar Electric Power Generation	Traded	Electric Power Generation and Transmission
221115	Wind Electric Power Generation	Traded	Electric Power Generation and Transmission
221116	Geothermal Electric Power Generation	Traded	Electric Power Generation and Transmission
221117	Biomass Electric Power Generation	Traded	Electric Power Generation and Transmission
221118	Other Electric Power Generation	Traded	Electric Power Generation and Transmission
221121	Electric Bulk Power Transmission and Control	Traded	Electric Power Generation and Transmission
562112	Hazardous Waste Collection	Traded	Environmental Services
562119	Other Waste Collection	Traded	Environmental Services
562211	Hazardous Waste Treatment and Disposal	Traded	Environmental Services
562213	Solid Waste Combustors and Incinerators	Traded	Environmental Services
562219	Other Nonhazardous Waste Treatment and Disposal	Traded	Environmental Services
562920	Materials Recovery Facilities	Traded	Environmental Services
562998	All Other Miscellaneous Waste Management Services	Traded	Environmental Services
901149	US Postal Service	Local	Federal Government Services
901199	Federal Government, Civilian, Excluding Postal Service	Local	Federal Government Services
901200	Federal Government, Military	Local	Federal Government Services
521110	Monetary Authorities-Central Bank	Traded	Financial Services
522180	Savings Institutions and Other Depository Credit Intermediation	Traded	Financial Services
522210	Credit Card Issuing	Traded	Financial Services
522220	Sales Financing	Traded	Financial Services
522291	Consumer Lending	Traded	Financial Services
522292	Real Estate Credit	Traded	Financial Services
522299	International, Secondary Market, and All Other Nondepository Credit Intermediation	Traded	Financial Services
522310	Mortgage and Nonmortgage Loan Brokers	Traded	Financial Services
522320	Financial Transactions Processing, Reserve, and Clearinghouse Activities	Traded	Financial Services
522390	Other Activities Related to Credit Intermediation	Traded	Financial Services
523150	Investment Banking and Securities Intermediation	Traded	Financial Services
523160	Commodity Contracts Intermediation	Traded	Financial Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
523210	Securities and Commodity Exchanges	Traded	Financial Services
523910	Miscellaneous Intermediation	Traded	Financial Services
523940	Portfolio Management and Investment Advice	Traded	Financial Services
523991	Trust, Fiduciary, and Custody Activities	Traded	Financial Services
523999	Miscellaneous Financial Investment Activities	Traded	Financial Services
525910	Open-End Investment Funds	Traded	Financial Services
525990	Other Financial Vehicles	Traded	Financial Services
561450	Credit Bureaus	Traded	Financial Services
114111	Finfish Fishing	Traded	Fishing and Fishing Products
114112	Shellfish Fishing	Traded	Fishing and Fishing Products
114119	Other Marine Fishing	Traded	Fishing and Fishing Products
311710	Seafood Product Preparation and Packaging	Traded	Fishing and Fishing Products
311111	Dog and Cat Food Manufacturing	Traded	Food Processing and Manufacturing
311119	Other Animal Food Manufacturing	Traded	Food Processing and Manufacturing
311211	Flour Milling	Traded	Food Processing and Manufacturing
311212	Rice Milling	Traded	Food Processing and Manufacturing
311213	Malt Manufacturing	Traded	Food Processing and Manufacturing
311221	Wet Corn Milling	Traded	Food Processing and Manufacturing
311224	Soybean and Other Oilseed Processing	Traded	Food Processing and Manufacturing
311225	Fats and Oils Refining and Blending	Traded	Food Processing and Manufacturing
311230	Breakfast Cereal Manufacturing	Traded	Food Processing and Manufacturing
311313	Beet Sugar Manufacturing	Traded	Food Processing and Manufacturing
311314	Cane Sugar Manufacturing	Traded	Food Processing and Manufacturing
311340	Nonchocolate Confectionery Manufacturing	Traded	Food Processing and Manufacturing
311351	Chocolate and Confectionery Manufacturing from Cacao Beans	Traded	Food Processing and Manufacturing
311352	Confectionery Manufacturing from Purchased Chocolate	Traded	Food Processing and Manufacturing
311411	Frozen Fruit, Juice, and Vegetable Manufacturing	Traded	Food Processing and Manufacturing
311412	Frozen Specialty Food Manufacturing	Traded	Food Processing and Manufacturing
311421	Fruit and Vegetable Canning	Traded	Food Processing and Manufacturing
311422	Specialty Canning	Traded	Food Processing and Manufacturing
311423	Dried and Dehydrated Food Manufacturing	Traded	Food Processing and Manufacturing
311511	Fluid Milk Manufacturing	Traded	Food Processing and Manufacturing
311512	Creamery Butter Manufacturing	Traded	Food Processing and Manufacturing
311513	Cheese Manufacturing	Traded	Food Processing and Manufacturing
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	Traded	Food Processing and Manufacturing
311520	Ice Cream and Frozen Dessert Manufacturing	Traded	Food Processing and Manufacturing
311813	Frozen Cakes, Pies, and Other Pastries Manufacturing	Traded	Food Processing and Manufacturing
311821	Cookie and Cracker Manufacturing	Traded	Food Processing and Manufacturing
311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	Traded	Food Processing and Manufacturing
311830	Tortilla Manufacturing	Traded	Food Processing and Manufacturing
311911	Roasted Nuts and Peanut Butter Manufacturing	Traded	Food Processing and Manufacturing
311919	Other Snack Food Manufacturing	Traded	Food Processing and Manufacturing

NAICS 2022	Industry Name	Traded vs. Local	Cluster
311920	Coffee and Tea Manufacturing	Traded	Food Processing and Manufacturing
311930	Flavoring Syrup and Concentrate Manufacturing	Traded	Food Processing and Manufacturing
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	Traded	Food Processing and Manufacturing
311942	Spice and Extract Manufacturing	Traded	Food Processing and Manufacturing
311991	Perishable Prepared Food Manufacturing	Traded	Food Processing and Manufacturing
311999	All Other Miscellaneous Food Manufacturing	Traded	Food Processing and Manufacturing
312111	Soft Drink Manufacturing	Traded	Food Processing and Manufacturing
312112	Bottled Water Manufacturing	Traded	Food Processing and Manufacturing
312113	Ice Manufacturing	Traded	Food Processing and Manufacturing
312120	Breweries	Traded	Food Processing and Manufacturing
312130	Wineries	Traded	Food Processing and Manufacturing
312140	Distilleries	Traded	Food Processing and Manufacturing
327213	Glass Container Manufacturing	Traded	Food Processing and Manufacturing
424510	Grain and Field Bean Merchant Wholesalers	Traded	Food Processing and Manufacturing
316110	Leather and Hide Tanning and Finishing	Traded	Footwear
316210	Footwear Manufacturing	Traded	Footwear
113110	Timber Tract Operations	Traded	Forestry
113210	Forest Nurseries and Gathering of Forest Products	Traded	Forestry
113310	Logging	Traded	Forestry
115310	Support Activities for Forestry	Traded	Forestry
321991	Manufactured Home (Mobile Home) Manufacturing	Traded	Furniture
337110	Wood Kitchen Cabinet and Countertop Manufacturing	Traded	Furniture
337121	Upholstered Household Furniture Manufacturing	Traded	Furniture
337122	Nonupholstered Wood Household Furniture Manufacturing	Traded	Furniture
337126	Household Furniture (except Wood and Upholstered) Manufacturing	Traded	Furniture
337127	Institutional Furniture Manufacturing	Traded	Furniture
337211	Wood Office Furniture Manufacturing	Traded	Furniture
337214	Office Furniture (except Wood) Manufacturing	Traded	Furniture
337215	Showcase, Partition, Shelving, and Locker Manufacturing	Traded	Furniture
337910	Mattress Manufacturing	Traded	Furniture
114210	Hunting and Trapping	Traded	Hospitality and Tourism
459920	Art Dealers	Traded	Hospitality and Tourism
487110	Scenic and Sightseeing Transportation, Land	Traded	Hospitality and Tourism
487210	Scenic and Sightseeing Transportation, Water	Traded	Hospitality and Tourism
487990	Scenic and Sightseeing Transportation, Other	Traded	Hospitality and Tourism
532284	Recreational Goods Rental	Traded	Hospitality and Tourism
561510	Travel Agencies	Traded	Hospitality and Tourism
561520	Tour Operators	Traded	Hospitality and Tourism
561591	Convention and Visitors Bureaus	Traded	Hospitality and Tourism
561599	All Other Travel Arrangement and Reservation Services	Traded	Hospitality and Tourism
711211	Sports Teams and Clubs	Traded	Hospitality and Tourism
711212	Racetracks	Traded	Hospitality and Tourism

NAICS 2022	Industry Name	Traded vs. Local	Cluster
711219	Other Spectator Sports	Traded	Hospitality and Tourism
712110	Museums	Traded	Hospitality and Tourism
712120	Historical Sites	Traded	Hospitality and Tourism
712130	Zoos and Botanical Gardens	Traded	Hospitality and Tourism
712190	Nature Parks and Other Similar Institutions	Traded	Hospitality and Tourism
713110	Amusement and Theme Parks	Traded	Hospitality and Tourism
713120	Amusement Arcades	Traded	Hospitality and Tourism
713210	Casinos (except Casino Hotels)	Traded	Hospitality and Tourism
713290	Other Gambling Industries	Traded	Hospitality and Tourism
713920	Skiing Facilities	Traded	Hospitality and Tourism
713930	Marinas	Traded	Hospitality and Tourism
713990	All Other Amusement and Recreation Industries	Traded	Hospitality and Tourism
721110	Hotels (except Casino Hotels) and Motels	Traded	Hospitality and Tourism
721120	Casino Hotels	Traded	Hospitality and Tourism
721191	Bed-and-Breakfast Inns	Traded	Hospitality and Tourism
721199	All Other Traveler Accommodation	Traded	Hospitality and Tourism
721211	RV (Recreational Vehicle) Parks and Campgrounds	Traded	Hospitality and Tourism
721214	Recreational and Vacation Camps (except Campgrounds)	Traded	Hospitality and Tourism
721310	Rooming and Boarding Houses, Dormitories, and Workers' Camps	Traded	Hospitality and Tourism
333242	Semiconductor Machinery Manufacturing	Traded	Information Technology and Analytical Instruments
333310	Commercial and Service Industry Machinery Manufacturing	Traded	Information Technology and Analytical Instruments
334111	Electronic Computer Manufacturing	Traded	Information Technology and Analytical Instruments
334112	Computer Storage Device Manufacturing	Traded	Information Technology and Analytical Instruments
334118	Computer Terminal and Other Computer Peripheral Equipment Manufacturing	Traded	Information Technology and Analytical Instruments
334310	Audio and Video Equipment Manufacturing	Traded	Information Technology and Analytical Instruments
334412	Bare Printed Circuit Board Manufacturing	Traded	Information Technology and Analytical Instruments
334413	Semiconductor and Related Device Manufacturing	Traded	Information Technology and Analytical Instruments
334416	Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing	Traded	Information Technology and Analytical Instruments
334417	Electronic Connector Manufacturing	Traded	Information Technology and Analytical Instruments
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	Traded	Information Technology and Analytical Instruments
334419	Other Electronic Component Manufacturing	Traded	Information Technology and Analytical Instruments
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing	Traded	Information Technology and Analytical Instruments
334512	Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use	Traded	Information Technology and Analytical Instruments
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	Traded	Information Technology and Analytical Instruments
334514	Totalizing Fluid Meter and Counting Device Manufacturing	Traded	Information Technology and Analytical Instruments
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	Traded	Information Technology and Analytical Instruments
334516	Analytical Laboratory Instrument Manufacturing	Traded	Information Technology and Analytical Instruments
334517	Irradiation Apparatus Manufacturing	Traded	Information Technology and Analytical Instruments
334519	Other Measuring and Controlling Device Manufacturing	Traded	Information Technology and Analytical Instruments
334610	Manufacturing and Reproducing Magnetic and Optical Media	Traded	Information Technology and Analytical Instruments
513210	Software Publishers	Traded	Information Technology and Analytical Instruments
524113	Direct Life Insurance Carriers	Traded	Insurance Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
524114	Direct Health and Medical Insurance Carriers	Traded	Insurance Services
524126	Direct Property and Casualty Insurance Carriers	Traded	Insurance Services
524127	Direct Title Insurance Carriers	Traded	Insurance Services
524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	Traded	Insurance Services
524130	Reinsurance Carriers	Traded	Insurance Services
524291	Claims Adjusting	Traded	Insurance Services
524298	All Other Insurance Related Activities	Traded	Insurance Services
525110	Pension Funds	Traded	Insurance Services
525120	Health and Welfare Funds	Traded	Insurance Services
525190	Other Insurance Funds	Traded	Insurance Services
525920	Trusts, Estates, and Agency Accounts	Traded	Insurance Services
339910	Jewelry and Silverware Manufacturing	Traded	Jewelry and Precious Metals
314910	Textile Bag and Canvas Mills	Traded	Leather and Related Products
316990	Other Leather and Allied Product Manufacturing	Traded	Leather and Related Products
335131	Residential Electric Lighting Fixture Manufacturing	Traded	Lighting and Electrical Equipment
335132	Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing	Traded	Lighting and Electrical Equipment
335139	Electric Lamp Bulb and Other Lighting Equipment Manufacturing	Traded	Lighting and Electrical Equipment
335311	Power, Distribution, and Specialty Transformer Manufacturing	Traded	Lighting and Electrical Equipment
335312	Motor and Generator Manufacturing	Traded	Lighting and Electrical Equipment
335313	Switchgear and Switchboard Apparatus Manufacturing	Traded	Lighting and Electrical Equipment
335314	Relay and Industrial Control Manufacturing	Traded	Lighting and Electrical Equipment
335910	Battery Manufacturing	Traded	Lighting and Electrical Equipment
335921	Fiber Optic Cable Manufacturing	Traded	Lighting and Electrical Equipment
335929	Other Communication and Energy Wire Manufacturing	Traded	Lighting and Electrical Equipment
335931	Current-Carrying Wiring Device Manufacturing	Traded	Lighting and Electrical Equipment
335932	Noncurrent-Carrying Wiring Device Manufacturing	Traded	Lighting and Electrical Equipment
335991	Carbon and Graphite Product Manufacturing	Traded	Lighting and Electrical Equipment
335999	All Other Miscellaneous Electrical Equipment and Component Manufacturing	Traded	Lighting and Electrical Equipment
311611	Animal (except Poultry) Slaughtering	Traded	Livestock Processing
311612	Meat Processed from Carcasses	Traded	Livestock Processing
311613	Rendering and Meat Byproduct Processing	Traded	Livestock Processing
311615	Poultry Processing	Traded	Livestock Processing
424520	Livestock Merchant Wholesalers	Traded	Livestock Processing
339950	Sign Manufacturing	Local	Local Commercial Services
459410	Office Supplies and Stationery Retailers	Local	Local Commercial Services
541110	Offices of Lawyers	Local	Local Commercial Services
541211	Offices of Certified Public Accountants	Local	Local Commercial Services
541219	Other Accounting Services	Local	Local Commercial Services
541350	Building Inspection Services	Local	Local Commercial Services
541380	Testing Laboratories	Local	Local Commercial Services
541620	Environmental Consulting Services	Local	Local Commercial Services
541922	Commercial Photography	Local	Local Commercial Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
561110	Office Administrative Services	Local	Local Commercial Services
561320	Temporary Help Services	Local	Local Commercial Services
561410	Document Preparation Services	Local	Local Commercial Services
561431	Private Mail Centers	Local	Local Commercial Services
561439	Other Business Service Centers (including Copy Shops)	Local	Local Commercial Services
561491	Repossession Services	Local	Local Commercial Services
561492	Court Reporting and Stenotype Services	Local	Local Commercial Services
561611	Investigation Services	Local	Local Commercial Services
561612	Security Guards and Patrol Services	Local	Local Commercial Services
561613	Armored Car Services	Local	Local Commercial Services
561621	Security Systems Services (except Locksmiths)	Local	Local Commercial Services
561622	Locksmiths	Local	Local Commercial Services
561710	Exterminating and Pest Control Services	Local	Local Commercial Services
561720	Janitorial Services	Local	Local Commercial Services
561790	Other Services to Buildings and Dwellings	Local	Local Commercial Services
561990	All Other Support Services	Local	Local Commercial Services
811210	Electronic and Precision Equipment Repair and Maintenance	Local	Local Commercial Services
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	Local	Local Commercial Services
811411	Home and Garden Equipment Repair and Maintenance	Local	Local Commercial Services
811412	Appliance Repair and Maintenance	Local	Local Commercial Services
812320	Drycleaning and Laundry Services (except Coin-Operated)	Local	Local Commercial Services
812331	Linen Supply	Local	Local Commercial Services
812332	Industrial Launderers	Local	Local Commercial Services
624110	Child and Youth Services	Local	Local Community and Civic Organizations
624120	Services for the Elderly and Persons with Disabilities	Local	Local Community and Civic Organizations
624190	Other Individual and Family Services	Local	Local Community and Civic Organizations
624210	Community Food Services	Local	Local Community and Civic Organizations
624221	Temporary Shelters	Local	Local Community and Civic Organizations
624229	Other Community Housing Services	Local	Local Community and Civic Organizations
624230	Emergency and Other Relief Services	Local	Local Community and Civic Organizations
813110	Religious Organizations	Local	Local Community and Civic Organizations
813211	Grantmaking Foundations	Local	Local Community and Civic Organizations
813212	Voluntary Health Organizations	Local	Local Community and Civic Organizations
813219	Other Grantmaking and Giving Services	Local	Local Community and Civic Organizations
813311	Human Rights Organizations	Local	Local Community and Civic Organizations
813312	Environment, Conservation and Wildlife Organizations	Local	Local Community and Civic Organizations
813319	Other Social Advocacy Organizations	Local	Local Community and Civic Organizations
813410	Civic and Social Organizations	Local	Local Community and Civic Organizations
813910	Business Associations	Local	Local Community and Civic Organizations
813930	Labor Unions and Similar Labor Organizations	Local	Local Community and Civic Organizations
813940	Political Organizations	Local	Local Community and Civic Organizations
813990	Other Similar Organizations (except Business, Professional, Labor, and Political Organizations)	Local	Local Community and Civic Organizations

NAICS 2022	Industry Name	Traded vs. Local	Cluster
611110	Elementary and Secondary Schools	Local	Local Education and Training
611519	Other Technical and Trade Schools	Local	Local Education and Training
611610	Fine Arts Schools	Local	Local Education and Training
611692	Automobile Driving Schools	Local	Local Education and Training
624310	Vocational Rehabilitation Services	Local	Local Education and Training
902611	Elementary and Secondary Schools (State Government)	Local	Local Education and Training
903611	Elementary and Secondary Schools (Local Government)	Local	Local Education and Training
449210	Electronics and Appliance Retailers	Local	Local Entertainment and Media
459110	Sporting Goods Retailers	Local	Local Entertainment and Media
459120	Hobby, Toy, and Game Retailers	Local	Local Entertainment and Media
459140	Musical Instrument and Supplies Retailers	Local	Local Entertainment and Media
459210	Book Retailers and News Dealers	Local	Local Entertainment and Media
512131	Motion Picture Theaters (except Drive-Ins)	Local	Local Entertainment and Media
513110	Newspaper Publishers	Local	Local Entertainment and Media
516110	Radio Broadcasting Stations	Local	Local Entertainment and Media
516120	Television Broadcasting Stations	Local	Local Entertainment and Media
516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	Local	Local Entertainment and Media
532282	Video Tape and Disc Rental	Local	Local Entertainment and Media
522110	Commercial Banking	Local	Local Financial Services
522130	Credit Unions	Local	Local Financial Services
524210	Insurance Agencies and Brokerages	Local	Local Financial Services
524292	Pharmacy Benefit Management and Other Third Party Administration of Insurance and Pension Funds	Local	Local Financial Services
541213	Tax Preparation Services	Local	Local Financial Services
561440	Collection Agencies	Local	Local Financial Services
311811	Retail Bakeries	Local	Local Food and Beverage Processing and Distribution
311812	Commercial Bakeries	Local	Local Food and Beverage Processing and Distribution
424410	General Line Grocery Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
424420	Packaged Frozen Food Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
424450	Confectionery Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
424490	Other Grocery and Related Products Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
424810	Beer and Ale Merchant Wholesalers	Local	Local Food and Beverage Processing and Distribution
441330	Automotive Parts and Accessories Retailers	Local	Local Food and Beverage Processing and Distribution
445110	Supermarkets and Other Grocery (except Convenience) Stores	Local	Local Food and Beverage Processing and Distribution
445131	Convenience Retailers	Local	Local Food and Beverage Processing and Distribution
445132	Vending Machine Operators	Local	Local Food and Beverage Processing and Distribution
445230	Fruit and Vegetable Markets	Local	Local Food and Beverage Processing and Distribution
445240	Meat Retailers	Local	Local Food and Beverage Processing and Distribution
445250	Fish and Seafood Retailers	Local	Local Food and Beverage Processing and Distribution
445291	Baked Goods Stores	Local	Local Food and Beverage Processing and Distribution
445292	Confectionery and Nut Stores	Local	Local Food and Beverage Processing and Distribution
445298	All Other Specialty Food Retailers	Local	Local Food and Beverage Processing and Distribution

NAICS 2022	Industry Name	Traded vs. Local	Cluster
445320	Beer, Wine, and Liquor Retailers	Local	Local Food and Beverage Processing and Distribution
449210	Electronics and Appliance Retailers	Local	Local Food and Beverage Processing and Distribution
455219	All Other General Merchandise Retailers	Local	Local Food and Beverage Processing and Distribution
456110	Pharmacies and Drug Retailers	Local	Local Food and Beverage Processing and Distribution
456191	Food (Health) Supplement Retailers	Local	Local Food and Beverage Processing and Distribution
459991	Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers	Local	Local Food and Beverage Processing and Distribution
459999	All Other Miscellaneous Retailers	Local	Local Food and Beverage Processing and Distribution
722330	Mobile Food Services	Local	Local Food and Beverage Processing and Distribution
903999	Local Government, Excluding Education and Hospitals	Local	Local Government Services
339116	Dental Laboratories	Local	Local Health Services
456110	Pharmacies and Drug Retailers	Local	Local Health Services
456130	Optical Goods Retailers	Local	Local Health Services
532283	Home Health Equipment Rental	Local	Local Health Services
621111	Offices of Physicians (except Mental Health Specialists)	Local	Local Health Services
621112	Offices of Physicians, Mental Health Specialists	Local	Local Health Services
621210	Offices of Dentists	Local	Local Health Services
621310	Offices of Chiropractors	Local	Local Health Services
621320	Offices of Optometrists	Local	Local Health Services
621330	Offices of Mental Health Practitioners (except Physicians)	Local	Local Health Services
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	Local	Local Health Services
621391	Offices of Podiatrists	Local	Local Health Services
621399	Offices of All Other Miscellaneous Health Practitioners	Local	Local Health Services
621410	Family Planning Centers	Local	Local Health Services
621420	Outpatient Mental Health and Substance Abuse Centers	Local	Local Health Services
621491	HMO Medical Centers	Local	Local Health Services
621492	Kidney Dialysis Centers	Local	Local Health Services
621493	Freestanding Ambulatory Surgical and Emergency Centers	Local	Local Health Services
621498	All Other Outpatient Care Centers	Local	Local Health Services
621511	Medical Laboratories	Local	Local Health Services
621512	Diagnostic Imaging Centers	Local	Local Health Services
621610	Home Health Care Services	Local	Local Health Services
621991	Blood and Organ Banks	Local	Local Health Services
621999	All Other Miscellaneous Ambulatory Health Care Services	Local	Local Health Services
622110	General Medical and Surgical Hospitals	Local	Local Health Services
622210	Psychiatric and Substance Abuse Hospitals	Local	Local Health Services
622310	Specialty (except Psychiatric and Substance Abuse) Hospitals	Local	Local Health Services
623110	Nursing Care Facilities (Skilled Nursing Facilities)	Local	Local Health Services
623210	Residential Intellectual and Developmental Disability Facilities	Local	Local Health Services
623220	Residential Mental Health and Substance Abuse Facilities	Local	Local Health Services
623311	Continuing Care Retirement Communities	Local	Local Health Services
623312	Assisted Living Facilities for the Elderly	Local	Local Health Services
623990	Other Residential Care Facilities	Local	Local Health Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
812210	Funeral Homes and Funeral Services	Local	Local Health Services
812220	Cemeteries and Crematories	Local	Local Health Services
902622	Hospitals (State Government)	Local	Local Health Services
903622	Hospitals (Local Government)	Local	Local Health Services
459420	Gift, Novelty, and Souvenir Retailers	Local	Local Hospitality Establishments
611620	Sports and Recreation Instruction	Local	Local Hospitality Establishments
713910	Golf Courses and Country Clubs	Local	Local Hospitality Establishments
713940	Fitness and Recreational Sports Centers	Local	Local Hospitality Establishments
713950	Bowling Centers	Local	Local Hospitality Establishments
722310	Food Service Contractors	Local	Local Hospitality Establishments
722320	Caterers	Local	Local Hospitality Establishments
722410	Drinking Places (Alcoholic Beverages)	Local	Local Hospitality Establishments
722511	Full-Service Restaurants	Local	Local Hospitality Establishments
722513	Limited-Service Restaurants	Local	Local Hospitality Establishments
722514	Cafeterias, Grill Buffets, and Buffets	Local	Local Hospitality Establishments
722515	Snack and Nonalcoholic Beverage Bars	Local	Local Hospitality Establishments
423710	Hardware Merchant Wholesalers	Local	Local Household Goods and Services
444140	Hardware Retailers	Local	Local Household Goods and Services
444230	Outdoor Power Equipment Retailers	Local	Local Household Goods and Services
444240	Nursery, Garden Center, and Farm Supply Retailers	Local	Local Household Goods and Services
449110	Furniture Retailers	Local	Local Household Goods and Services
449121	Floor Covering Retailers	Local	Local Household Goods and Services
449122	Window Treatment Retailers	Local	Local Household Goods and Services
449129	All Other Home Furnishings Retailers	Local	Local Household Goods and Services
449210	Electronics and Appliance Retailers	Local	Local Household Goods and Services
459310	Florists	Local	Local Household Goods and Services
561730	Landscaping Services	Local	Local Household Goods and Services
561740	Carpet and Upholstery Cleaning Services	Local	Local Household Goods and Services
811210	Electronic and Precision Equipment Repair and Maintenance	Local	Local Household Goods and Services
811420	Reupholstery and Furniture Repair	Local	Local Household Goods and Services
332710	Machine Shops	Local	Local Industrial Products and Services
423930	Recyclable Material Merchant Wholesalers	Local	Local Industrial Products and Services
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	Local	Local Industrial Products and Services
532210	Consumer Electronics and Appliances Rental	Local	Local Industrial Products and Services
532310	General Rental Centers	Local	Local Industrial Products and Services
811210	Electronic and Precision Equipment Repair and Maintenance	Local	Local Industrial Products and Services
484110	General Freight Trucking, Local	Local	Local Logistical Services
484122	General Freight Trucking, Long-Distance, Less Than Truckload	Local	Local Logistical Services
484210	Used Household and Office Goods Moving	Local	Local Logistical Services
484220	Specialized Freight (except Used Goods) Trucking, Local	Local	Local Logistical Services
485111	Mixed Mode Transit Systems	Local	Local Logistical Services
485112	Commuter Rail Systems	Local	Local Logistical Services

NAICS 2022	Industry Name	Traded vs. Local	Cluster
485113	Bus and Other Motor Vehicle Transit Systems	Local	Local Logistical Services
485119	Other Urban Transit Systems	Local	Local Logistical Services
485410	School and Employee Bus Transportation	Local	Local Logistical Services
485991	Special Needs Transportation	Local	Local Logistical Services
492110	Couriers and Express Delivery Services	Local	Local Logistical Services
492210	Local Messengers and Local Delivery	Local	Local Logistical Services
531130	Lessors of Miniwarehouses and Self-Storage Units	Local	Local Logistical Services
532111	Passenger Car Rental	Local	Local Logistical Services
532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing	Local	Local Logistical Services
562111	Solid Waste Collection	Local	Local Logistical Services
621910	Ambulance Services	Local	Local Logistical Services
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	Local	Local Motor Vehicle Products and Services
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	Local	Local Motor Vehicle Products and Services
423130	Tire and Tube Merchant Wholesalers	Local	Local Motor Vehicle Products and Services
423140	Motor Vehicle Parts (Used) Merchant Wholesalers	Local	Local Motor Vehicle Products and Services
441110	New Car Dealers	Local	Local Motor Vehicle Products and Services
441120	Used Car Dealers	Local	Local Motor Vehicle Products and Services
441210	Recreational Vehicle Dealers	Local	Local Motor Vehicle Products and Services
441222	Boat Dealers	Local	Local Motor Vehicle Products and Services
441227	Motorcycle, ATV, and All Other Motor Vehicle Dealers	Local	Local Motor Vehicle Products and Services
441330	Automotive Parts and Accessories Retailers	Local	Local Motor Vehicle Products and Services
441340	Tire Dealers	Local	Local Motor Vehicle Products and Services
457110	Gasoline Stations with Convenience Stores	Local	Local Motor Vehicle Products and Services
457120	Other Gasoline Stations	Local	Local Motor Vehicle Products and Services
459930	Manufactured (Mobile) Home Dealers	Local	Local Motor Vehicle Products and Services
488410	Motor Vehicle Towing	Local	Local Motor Vehicle Products and Services
811111	General Automotive Repair	Local	Local Motor Vehicle Products and Services
811114	Specialized Automotive Repair	Local	Local Motor Vehicle Products and Services
811121	Automotive Body, Paint, and Interior Repair and Maintenance	Local	Local Motor Vehicle Products and Services
811122	Automotive Glass Replacement Shops	Local	Local Motor Vehicle Products and Services
811191	Automotive Oil Change and Lubrication Shops	Local	Local Motor Vehicle Products and Services
811192	Car Washes	Local	Local Motor Vehicle Products and Services
811198	All Other Automotive Repair and Maintenance	Local	Local Motor Vehicle Products and Services
812930	Parking Lots and Garages	Local	Local Motor Vehicle Products and Services
455219	All Other General Merchandise Retailers	Local	Local Personal Services (Non-Medical)
456120	Cosmetics, Beauty Supplies, and Perfume Retailers	Local	Local Personal Services (Non-Medical)
456199	All Other Health and Personal Care Retailers	Local	Local Personal Services (Non-Medical)
459910	Pet and Pet Supplies Retailers	Local	Local Personal Services (Non-Medical)
459991	Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers	Local	Local Personal Services (Non-Medical)
459999	All Other Miscellaneous Retailers	Local	Local Personal Services (Non-Medical)
532281	Formal Wear and Costume Rental	Local	Local Personal Services (Non-Medical)
532289	All Other Consumer Goods Rental	Local	Local Personal Services (Non-Medical)

NAICS 2022	Industry Name	Traded vs. Local	Cluster
541921	Photography Studios, Portrait	Local	Local Personal Services (Non-Medical)
541940	Veterinary Services	Local	Local Personal Services (Non-Medical)
611511	Cosmetology and Barber Schools	Local	Local Personal Services (Non-Medical)
624410	Child Day Care Services	Local	Local Personal Services (Non-Medical)
811430	Footwear and Leather Goods Repair	Local	Local Personal Services (Non-Medical)
811490	Other Personal and Household Goods Repair and Maintenance	Local	Local Personal Services (Non-Medical)
812111	Barber Shops	Local	Local Personal Services (Non-Medical)
812112	Beauty Salons	Local	Local Personal Services (Non-Medical)
812113	Nail Salons	Local	Local Personal Services (Non-Medical)
812191	Diet and Weight Reducing Centers	Local	Local Personal Services (Non-Medical)
812199	Other Personal Care Services	Local	Local Personal Services (Non-Medical)
812310	Coin-Operated Laundries and Drycleaners	Local	Local Personal Services (Non-Medical)
812910	Pet Care (except Veterinary) Services	Local	Local Personal Services (Non-Medical)
812921	Photofinishing Laboratories (except One-Hour)	Local	Local Personal Services (Non-Medical)
812922	One-Hour Photofinishing	Local	Local Personal Services (Non-Medical)
812990	All Other Personal Services	Local	Local Personal Services (Non-Medical)
236115	New Single-Family Housing Construction (except For-Sale Builders)	Local	Local Real Estate, Construction, and Development
236116	New Multifamily Housing Construction (except For-Sale Builders)	Local	Local Real Estate, Construction, and Development
236117	New Housing For-Sale Builders	Local	Local Real Estate, Construction, and Development
236118	Residential Remodelers	Local	Local Real Estate, Construction, and Development
236220	Commercial and Institutional Building Construction	Local	Local Real Estate, Construction, and Development
237110	Water and Sewer Line and Related Structures Construction	Local	Local Real Estate, Construction, and Development
237210	Land Subdivision	Local	Local Real Estate, Construction, and Development
237310	Highway, Street, and Bridge Construction	Local	Local Real Estate, Construction, and Development
238110	Poured Concrete Foundation and Structure Contractors	Local	Local Real Estate, Construction, and Development
238120	Structural Steel and Precast Concrete Contractors	Local	Local Real Estate, Construction, and Development
238130	Framing Contractors	Local	Local Real Estate, Construction, and Development
238140	Masonry Contractors	Local	Local Real Estate, Construction, and Development
238150	Glass and Glazing Contractors	Local	Local Real Estate, Construction, and Development
238160	Roofing Contractors	Local	Local Real Estate, Construction, and Development
238170	Siding Contractors	Local	Local Real Estate, Construction, and Development
238190	Other Foundation, Structure, and Building Exterior Contractors	Local	Local Real Estate, Construction, and Development
238210	Electrical Contractors and Other Wiring Installation Contractors	Local	Local Real Estate, Construction, and Development
238220	Plumbing, Heating, and Air-Conditioning Contractors	Local	Local Real Estate, Construction, and Development
238290	Other Building Equipment Contractors	Local	Local Real Estate, Construction, and Development
238310	Drywall and Insulation Contractors	Local	Local Real Estate, Construction, and Development
238320	Painting and Wall Covering Contractors	Local	Local Real Estate, Construction, and Development
238330	Flooring Contractors	Local	Local Real Estate, Construction, and Development
238340	Tile and Terrazzo Contractors	Local	Local Real Estate, Construction, and Development
238350	Finish Carpentry Contractors	Local	Local Real Estate, Construction, and Development
238390	Other Building Finishing Contractors	Local	Local Real Estate, Construction, and Development
238910	Site Preparation Contractors	Local	Local Real Estate, Construction, and Development

NAICS 2022	Industry Name	Traded vs. Local	Cluster
238990	All Other Specialty Trade Contractors	Local	Local Real Estate, Construction, and Development
327320	Ready-Mix Concrete Manufacturing	Local	Local Real Estate, Construction, and Development
327390	Other Concrete Product Manufacturing	Local	Local Real Estate, Construction, and Development
332322	Sheet Metal Work Manufacturing	Local	Local Real Estate, Construction, and Development
337212	Custom Architectural Woodwork and Millwork Manufacturing	Local	Local Real Estate, Construction, and Development
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423390	Other Construction Material Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423730	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
423740	Refrigeration Equipment and Supplies Merchant Wholesalers	Local	Local Real Estate, Construction, and Development
444110	Home Centers	Local	Local Real Estate, Construction, and Development
444120	Paint and Wallpaper Stores	Local	Local Real Estate, Construction, and Development
444180	Other Building Material Dealers	Local	Local Real Estate, Construction, and Development
531110	Lessors of Residential Buildings and Dwellings	Local	Local Real Estate, Construction, and Development
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	Local	Local Real Estate, Construction, and Development
531190	Lessors of Other Real Estate Property	Local	Local Real Estate, Construction, and Development
531210	Offices of Real Estate Agents and Brokers	Local	Local Real Estate, Construction, and Development
531311	Residential Property Managers	Local	Local Real Estate, Construction, and Development
531312	Nonresidential Property Managers	Local	Local Real Estate, Construction, and Development
531320	Offices of Real Estate Appraisers	Local	Local Real Estate, Construction, and Development
531390	Other Activities Related to Real Estate	Local	Local Real Estate, Construction, and Development
541191	Title Abstract and Settlement Offices	Local	Local Real Estate, Construction, and Development
541370	Surveying and Mapping (except Geophysical) Services	Local	Local Real Estate, Construction, and Development
562991	Septic Tank and Related Services	Local	Local Real Estate, Construction, and Development
455110	Department Stores	Local	Local Retailing of Clothing and General Merchandise
455211	Warehouse Clubs and Supercenters	Local	Local Retailing of Clothing and General Merchandise
455219	All Other General Merchandise Retailers	Local	Local Retailing of Clothing and General Merchandise
458110	Clothing and Clothing Accessories Retailers	Local	Local Retailing of Clothing and General Merchandise
458210	Shoe Retailers	Local	Local Retailing of Clothing and General Merchandise
458310	Jewelry Retailers	Local	Local Retailing of Clothing and General Merchandise
458320	Luggage and Leather Goods Retailers	Local	Local Retailing of Clothing and General Merchandise
459130	Sewing, Needlework, and Piece Goods Retailers	Local	Local Retailing of Clothing and General Merchandise
459510	Used Merchandise Retailers	Local	Local Retailing of Clothing and General Merchandise
221122	Electric Power Distribution	Local	Local Utilities
221210	Natural Gas Distribution	Local	Local Utilities
221320	Sewage Treatment Facilities	Local	Local Utilities
457210	Fuel Dealers	Local	Local Utilities
517111	Wired Telecommunications Carriers	Local	Local Utilities
517121	Telecommunications Resellers	Local	Local Utilities
562212	Solid Waste Landfill	Local	Local Utilities

NAICS 2022	Industry Name	Traded vs. Local	Cluster
562910	Remediation Services	Local	Local Utilities
513120	Periodical Publishers	Traded	Marketing, Design, and Publishing
513130	Book Publishers	Traded	Marketing, Design, and Publishing
513140	Directory and Mailing List Publishers	Traded	Marketing, Design, and Publishing
513199	All Other Publishers	Traded	Marketing, Design, and Publishing
516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	Traded	Marketing, Design, and Publishing
519210	Libraries and Archives	Traded	Marketing, Design, and Publishing
519290	Web Search Portals and All Other Information Services	Traded	Marketing, Design, and Publishing
541410	Interior Design Services	Traded	Marketing, Design, and Publishing
541420	Industrial Design Services	Traded	Marketing, Design, and Publishing
541430	Graphic Design Services	Traded	Marketing, Design, and Publishing
541490	Other Specialized Design Services	Traded	Marketing, Design, and Publishing
541613	Marketing Consulting Services	Traded	Marketing, Design, and Publishing
541810	Advertising Agencies	Traded	Marketing, Design, and Publishing
541820	Public Relations Agencies	Traded	Marketing, Design, and Publishing
541830	Media Buying Agencies	Traded	Marketing, Design, and Publishing
541840	Media Representatives	Traded	Marketing, Design, and Publishing
541850	Outdoor Advertising	Traded	Marketing, Design, and Publishing
541860	Direct Mail Advertising	Traded	Marketing, Design, and Publishing
541870	Advertising Material Distribution Services	Traded	Marketing, Design, and Publishing
541890	Other Services Related to Advertising	Traded	Marketing, Design, and Publishing
541910	Marketing Research and Public Opinion Polling	Traded	Marketing, Design, and Publishing
333310	Commercial and Service Industry Machinery Manufacturing	Traded	Medical Devices
339112	Surgical and Medical Instrument Manufacturing	Traded	Medical Devices
339113	Surgical Appliance and Supplies Manufacturing	Traded	Medical Devices
339114	Dental Equipment and Supplies Manufacturing	Traded	Medical Devices
339115	Ophthalmic Goods Manufacturing	Traded	Medical Devices
212210	Iron Ore Mining	Traded	Metal Mining
212220	Gold Ore and Silver Ore Mining	Traded	Metal Mining
212230	Copper, Nickel, Lead, and Zinc Mining	Traded	Metal Mining
212290	Other Metal Ore Mining	Traded	Metal Mining
213114	Support Activities for Metal Mining	Traded	Metal Mining
327910	Abrasive Product Manufacturing	Traded	Metalworking Technology
332313	Plate Work Manufacturing	Traded	Metalworking Technology
332721	Precision Turned Product Manufacturing	Traded	Metalworking Technology
332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing	Traded	Metalworking Technology
332811	Metal Heat Treating	Traded	Metalworking Technology
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	Traded	Metalworking Technology
332813	Electroplating, Plating, Polishing, Anodizing, and Coloring	Traded	Metalworking Technology
333511	Industrial Mold Manufacturing	Traded	Metalworking Technology
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	Traded	Metalworking Technology
333515	Cutting Tool and Machine Tool Accessory Manufacturing	Traded	Metalworking Technology

NAICS 2022	Industry Name	Traded vs. Local	Cluster
333517	Machine Tool Manufacturing	Traded	Metalworking Technology
333519	Rolling Mill and Other Metalworking Machinery Manufacturing	Traded	Metalworking Technology
333991	Power-Driven Handtool Manufacturing	Traded	Metalworking Technology
333992	Welding and Soldering Equipment Manufacturing	Traded	Metalworking Technology
512230	Music Publishers	Traded	Music and Sound Recording
512240	Sound Recording Studios	Traded	Music and Sound Recording
512250	Record Production and Distribution	Traded	Music and Sound Recording
512290	Other Sound Recording Industries	Traded	Music and Sound Recording
212311	Dimension Stone Mining and Quarrying	Traded	Nonmetal Mining
212312	Crushed and Broken Limestone Mining and Quarrying	Traded	Nonmetal Mining
212313	Crushed and Broken Granite Mining and Quarrying	Traded	Nonmetal Mining
212319	Other Crushed and Broken Stone Mining and Quarrying	Traded	Nonmetal Mining
212321	Construction Sand and Gravel Mining	Traded	Nonmetal Mining
212322	Industrial Sand Mining	Traded	Nonmetal Mining
212323	Kaolin, Clay, and Ceramic and Refractory Minerals Mining	Traded	Nonmetal Mining
212390	Other Nonmetallic Mineral Mining and Quarrying	Traded	Nonmetal Mining
213115	Support Activities for Nonmetallic Minerals (except Fuels) Mining	Traded	Nonmetal Mining
211120	Crude Petroleum Extraction	Traded	Oil and Gas Production and Transportation
211130	Natural Gas Extraction	Traded	Oil and Gas Production and Transportation
213111	Drilling Oil and Gas Wells	Traded	Oil and Gas Production and Transportation
213112	Support Activities for Oil and Gas Operations	Traded	Oil and Gas Production and Transportation
324110	Petroleum Refineries	Traded	Oil and Gas Production and Transportation
324199	All Other Petroleum and Coal Products Manufacturing	Traded	Oil and Gas Production and Transportation
333132	Oil and Gas Field Machinery and Equipment Manufacturing	Traded	Oil and Gas Production and Transportation
486110	Pipeline Transportation of Crude Oil	Traded	Oil and Gas Production and Transportation
486210	Pipeline Transportation of Natural Gas	Traded	Oil and Gas Production and Transportation
486910	Pipeline Transportation of Refined Petroleum Products	Traded	Oil and Gas Production and Transportation
486990	All Other Pipeline Transportation	Traded	Oil and Gas Production and Transportation
541360	Geophysical Surveying and Mapping Services	Traded	Oil and Gas Production and Transportation
322110	Pulp Mills	Traded	Paper and Packaging
322120	Paper Mills	Traded	Paper and Packaging
322130	Paperboard Mills	Traded	Paper and Packaging
322211	Corrugated and Solid Fiber Box Manufacturing	Traded	Paper and Packaging
322212	Folding Paperboard Box Manufacturing	Traded	Paper and Packaging
322219	Other Paperboard Container Manufacturing	Traded	Paper and Packaging
322220	Paper Bag and Coated and Treated Paper Manufacturing	Traded	Paper and Packaging
322230	Stationery Product Manufacturing	Traded	Paper and Packaging
322291	Sanitary Paper Product Manufacturing	Traded	Paper and Packaging
322299	All Other Converted Paper Product Manufacturing	Traded	Paper and Packaging
711110	Theater Companies and Dinner Theaters	Traded	Performing Arts
711120	Dance Companies	Traded	Performing Arts
711130	Musical Groups and Artists	Traded	Performing Arts

NAICS 2022	Industry Name	Traded vs. Local	Cluster
711190	Other Performing Arts Companies	Traded	Performing Arts
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	Traded	Performing Arts
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	Traded	Performing Arts
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	Traded	Performing Arts
711510	Independent Artists, Writers, and Performers	Traded	Performing Arts
325211	Plastics Material and Resin Manufacturing	Traded	Plastics
326111	Plastics Bag and Pouch Manufacturing	Traded	Plastics
326112	Plastics Packaging Film and Sheet (including Laminated) Manufacturing	Traded	Plastics
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	Traded	Plastics
326121	Unlaminated Plastics Profile Shape Manufacturing	Traded	Plastics
326122	Plastics Pipe and Pipe Fitting Manufacturing	Traded	Plastics
326130	Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing	Traded	Plastics
326140	Polystyrene Foam Product Manufacturing	Traded	Plastics
326150	Urethane and Other Foam Product (except Polystyrene) Manufacturing	Traded	Plastics
326160	Plastics Bottle Manufacturing	Traded	Plastics
326191	Plastics Plumbing Fixture Manufacturing	Traded	Plastics
326199	All Other Plastics Product Manufacturing	Traded	Plastics
339994	Broom, Brush, and Mop Manufacturing	Traded	Plastics
323111	Commercial Printing (except Screen and Books)	Traded	Printing Services
323113	Commercial Screen Printing	Traded	Printing Services
323117	Books Printing	Traded	Printing Services
323120	Support Activities for Printing	Traded	Printing Services
325910	Printing Ink Manufacturing	Traded	Printing Services
513191	Greeting Card Publishers	Traded	Printing Services
332911	Industrial Valve Manufacturing	Traded	Production Technology and Heavy Machinery
332912	Fluid Power Valve and Hose Fitting Manufacturing	Traded	Production Technology and Heavy Machinery
332919	Other Metal Valve and Pipe Fitting Manufacturing	Traded	Production Technology and Heavy Machinery
332991	Ball and Roller Bearing Manufacturing	Traded	Production Technology and Heavy Machinery
333111	Farm Machinery and Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333112	Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333120	Construction Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333131	Mining Machinery and Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333241	Food Product Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333243	Sawmill, Woodworking, and Paper Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333248	All Other Industrial Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333310	Commercial and Service Industry Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing	Traded	Production Technology and Heavy Machinery
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333611	Turbine and Turbine Generator Set Units Manufacturing	Traded	Production Technology and Heavy Machinery
333612	Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing	Traded	Production Technology and Heavy Machinery
333613	Mechanical Power Transmission Equipment Manufacturing	Traded	Production Technology and Heavy Machinery

NAICS 2022	Industry Name	Traded vs. Local	Cluster
333618	Other Engine Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333912	Air and Gas Compressor Manufacturing	Traded	Production Technology and Heavy Machinery
333914	Measuring, Dispensing, and Other Pumping Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333921	Elevator and Moving Stairway Manufacturing	Traded	Production Technology and Heavy Machinery
333922	Conveyor and Conveying Equipment Manufacturing	Traded	Production Technology and Heavy Machinery
333923	Overhead Traveling Crane, Hoist, and Monorail System Manufacturing	Traded	Production Technology and Heavy Machinery
333924	Industrial Truck, Tractor, Trailer, and Stackers Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333993	Packaging Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
333994	Industrial Process Furnace and Oven Manufacturing	Traded	Production Technology and Heavy Machinery
333995	Fluid Power Cylinder and Actuator Manufacturing	Traded	Production Technology and Heavy Machinery
333996	Fluid Power Pump and Motor Manufacturing	Traded	Production Technology and Heavy Machinery
333998	All Other Miscellaneous General Purpose Machinery Manufacturing	Traded	Production Technology and Heavy Machinery
336510	Railroad Rolling Stock Manufacturing	Traded	Production Technology and Heavy Machinery
339991	Gasket, Packing, and Sealing Device Manufacturing	Traded	Production Technology and Heavy Machinery
335210	Small Electrical Appliance Manufacturing	Traded	Recreational and Small Electric Goods
336991	Motorcycle, Bicycle, and Parts Manufacturing	Traded	Recreational and Small Electric Goods
337920	Blind and Shade Manufacturing	Traded	Recreational and Small Electric Goods
339920	Sporting and Athletic Goods Manufacturing	Traded	Recreational and Small Electric Goods
339930	Doll, Toy, and Game Manufacturing	Traded	Recreational and Small Electric Goods
339940	Office Supplies (except Paper) Manufacturing	Traded	Recreational and Small Electric Goods
339992	Musical Instrument Manufacturing	Traded	Recreational and Small Electric Goods
339993	Fastener, Button, Needle, and Pin Manufacturing	Traded	Recreational and Small Electric Goods
339999	All Other Miscellaneous Manufacturing	Traded	Recreational and Small Electric Goods
902999	State Government, Excluding Education and Hospitals	Local	State Government Services
313110	Fiber, Yarn, and Thread Mills	Traded	Textile Manufacturing
313210	Broadwoven Fabric Mills	Traded	Textile Manufacturing
313220	Narrow Fabric Mills and Schiffli Machine Embroidery	Traded	Textile Manufacturing
313230	Nonwoven Fabric Mills	Traded	Textile Manufacturing
313240	Knit Fabric Mills	Traded	Textile Manufacturing
313310	Textile and Fabric Finishing Mills	Traded	Textile Manufacturing
313320	Fabric Coating Mills	Traded	Textile Manufacturing
314110	Carpet and Rug Mills	Traded	Textile Manufacturing
314120	Curtain and Linen Mills	Traded	Textile Manufacturing
314994	Rope, Cordage, Twine, Tire Cord, and Tire Fabric Mills	Traded	Textile Manufacturing
315120	Apparel Knitting Mills	Traded	Textile Manufacturing
325220	Artificial and Synthetic Fibers and Filaments Manufacturing	Traded	Textile Manufacturing
312230	Tobacco Manufacturing	Traded	Tobacco
335220	Major Household Appliance Manufacturing	Traded	Trailers, Motor Homes, and Appliances
336212	Truck Trailer Manufacturing	Traded	Trailers, Motor Homes, and Appliances
336213	Motor Home Manufacturing	Traded	Trailers, Motor Homes, and Appliances
336214	Travel Trailer and Camper Manufacturing	Traded	Trailers, Motor Homes, and Appliances
339995	Burial Casket Manufacturing	Traded	Trailers, Motor Homes, and Appliances

NAICS 2022	Industry Name	Traded vs. Local	Cluster
481111	Scheduled Passenger Air Transportation	Traded	Transportation and Logistics
481112	Scheduled Freight Air Transportation	Traded	Transportation and Logistics
481211	Nonscheduled Chartered Passenger Air Transportation	Traded	Transportation and Logistics
481212	Nonscheduled Chartered Freight Air Transportation	Traded	Transportation and Logistics
481219	Other Nonscheduled Air Transportation	Traded	Transportation and Logistics
482110	Rail transportation	Traded	Transportation and Logistics
484121	General Freight Trucking, Long-Distance, Truckload	Traded	Transportation and Logistics
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	Traded	Transportation and Logistics
485210	Interurban and Rural Bus Transportation	Traded	Transportation and Logistics
485510	Charter Bus Industry	Traded	Transportation and Logistics
488111	Air Traffic Control	Traded	Transportation and Logistics
488119	Other Airport Operations	Traded	Transportation and Logistics
488190	Other Support Activities for Air Transportation	Traded	Transportation and Logistics
488210	Support Activities for Rail Transportation	Traded	Transportation and Logistics
488490	Other Support Activities for Road Transportation	Traded	Transportation and Logistics
488510	Freight Transportation Arrangement	Traded	Transportation and Logistics
488991	Packing and Crating	Traded	Transportation and Logistics
488999	All Other Support Activities for Transportation	Traded	Transportation and Logistics
491110	Postal Service	Traded	Transportation and Logistics
325110	Petrochemical Manufacturing	Traded	Upstream Chemical Products
325120	Industrial Gas Manufacturing	Traded	Upstream Chemical Products
325180	Other Basic Inorganic Chemical Manufacturing	Traded	Upstream Chemical Products
325193	Ethyl Alcohol Manufacturing	Traded	Upstream Chemical Products
325194	Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing	Traded	Upstream Chemical Products
325199	All Other Basic Organic Chemical Manufacturing	Traded	Upstream Chemical Products
325212	Synthetic Rubber Manufacturing	Traded	Upstream Chemical Products
325312	Phosphatic Fertilizer Manufacturing	Traded	Upstream Chemical Products
325320	Pesticide and Other Agricultural Chemical Manufacturing	Traded	Upstream Chemical Products
331110	Iron and Steel Mills and Ferroalloy Manufacturing	Traded	Upstream Metal Manufacturing
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	Traded	Upstream Metal Manufacturing
331221	Rolled Steel Shape Manufacturing	Traded	Upstream Metal Manufacturing
331222	Steel Wire Drawing	Traded	Upstream Metal Manufacturing
331313	Alumina Refining and Primary Aluminum Production	Traded	Upstream Metal Manufacturing
331314	Secondary Smelting and Alloying of Aluminum	Traded	Upstream Metal Manufacturing
331315	Aluminum Sheet, Plate, and Foil Manufacturing	Traded	Upstream Metal Manufacturing
331318	Other Aluminum Rolling, Drawing, and Extruding	Traded	Upstream Metal Manufacturing
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	Traded	Upstream Metal Manufacturing
331420	Copper Rolling, Drawing, Extruding, and Alloying	Traded	Upstream Metal Manufacturing
331491	Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding	Traded	Upstream Metal Manufacturing
331492	Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)	Traded	Upstream Metal Manufacturing
332111	Iron and Steel Forging	Traded	Upstream Metal Manufacturing
332112	Nonferrous Forging	Traded	Upstream Metal Manufacturing

NAICS 2022	Industry Name	Traded vs. Local	Cluster
332117	Powder Metallurgy Part Manufacturing	Traded	Upstream Metal Manufacturing
332119	Metal Crown, Closure, and Other Metal Stamping (except Automotive)	Traded	Upstream Metal Manufacturing
332613	Spring Manufacturing	Traded	Upstream Metal Manufacturing
332618	Other Fabricated Wire Product Manufacturing	Traded	Upstream Metal Manufacturing
512110	Motion Picture and Video Production	Traded	Video Production and Distribution
512120	Motion Picture and Video Distribution	Traded	Video Production and Distribution
512132	Drive-In Motion Picture Theaters	Traded	Video Production and Distribution
512191	Teleproduction and Other Postproduction Services	Traded	Video Production and Distribution
512199	Other Motion Picture and Video Industries	Traded	Video Production and Distribution
326211	Tire Manufacturing (except Retreading)	Traded	Vulcanized and Fired Materials
326212	Tire Retreading	Traded	Vulcanized and Fired Materials
326220	Rubber and Plastics Hoses and Belting Manufacturing	Traded	Vulcanized and Fired Materials
326291	Rubber Product Manufacturing for Mechanical Use	Traded	Vulcanized and Fired Materials
326299	All Other Rubber Product Manufacturing	Traded	Vulcanized and Fired Materials
327110	Pottery, Ceramics, and Plumbing Fixture Manufacturing	Traded	Vulcanized and Fired Materials
327120	Clay Building Material and Refractories Manufacturing	Traded	Vulcanized and Fired Materials
327211	Flat Glass Manufacturing	Traded	Vulcanized and Fired Materials
327212	Other Pressed and Blown Glass and Glassware Manufacturing	Traded	Vulcanized and Fired Materials
327215	Glass Product Manufacturing Made of Purchased Glass	Traded	Vulcanized and Fired Materials
327992	Ground or Treated Mineral and Earth Manufacturing	Traded	Vulcanized and Fired Materials
336611	Ship Building and Repairing	Traded	Water Transportation
336612	Boat Building	Traded	Water Transportation
483111	Deep Sea Freight Transportation	Traded	Water Transportation
483112	Deep Sea Passenger Transportation	Traded	Water Transportation
483113	Coastal and Great Lakes Freight Transportation	Traded	Water Transportation
483114	Coastal and Great Lakes Passenger Transportation	Traded	Water Transportation
483211	Inland Water Freight Transportation	Traded	Water Transportation
483212	Inland Water Passenger Transportation	Traded	Water Transportation
488310	Port and Harbor Operations	Traded	Water Transportation
488320	Marine Cargo Handling	Traded	Water Transportation
488330	Navigational Services to Shipping	Traded	Water Transportation
488390	Other Support Activities for Water Transportation	Traded	Water Transportation
321113	Sawmills	Traded	Wood Products
321114	Wood Preservation	Traded	Wood Products
321211	Hardwood Veneer and Plywood Manufacturing	Traded	Wood Products
321212	Softwood Veneer and Plywood Manufacturing	Traded	Wood Products
321215	Engineered Wood Member Manufacturing	Traded	Wood Products
321219	Reconstituted Wood Product Manufacturing	Traded	Wood Products
321911	Wood Window and Door Manufacturing	Traded	Wood Products
321912	Cut Stock, Resawing Lumber, and Planing	Traded	Wood Products
321918	Other Millwork (including Flooring)	Traded	Wood Products
321920	Wood Container and Pallet Manufacturing	Traded	Wood Products

NAICS 2022	Industry Name	Traded vs. Local	Cluster
321992	Prefabricated Wood Building Manufacturing	Traded	Wood Products
321999	All Other Miscellaneous Wood Product Manufacturing	Traded	Wood Products

Source: Delgado, M., M.E. Porter, and S. Stern (2014), "Defining Clusters of Related Industries."; EMSI.

Appendix G – Correspondence Between Cluster Mapping
Project and Cluster Definitions in Southern Border Coalition,
Regional Plan

Table G-1
Correspondence Between Traditional Industry Clusters (Exhib. 72) and Harvard Cluster Mapping Project
2023 Job Totals

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
Health Care and Social Assistance	11,109	Local Community and Civic Organizations	62.1%
		Local Education and Training	3.7%
		Local Health Services	28.6%
		Local Logistical Services	0.7%
		Local Personal Services (Non-Medical)	4.9%
		Total	100.0%
Government	20,421	Education and Knowledge Creation	5.9%
		Local Education and Training	40.2%
		Federal Government Services	21.2%
		Local Health Services	12.6%
		State Government Services	20.1%
		Total	100.0%
Retail Trade	8,563	Distribution and Electronic Commerce	10.8%
		Hospitality and Tourism	0.0%
		Local Commercial Services	0.2%
		Local Entertainment and Media	4.0%
		Local Food and Beverage Processing and Distribution	23.0%
		Local Health Services	2.3%
		Local Hospitality Establishments	0.3%
		Local Household Goods and Services	3.9%
		Local Motor Vehicle Products and Services	13.2%
		Local Personal Services (Non-Medical)	10.1%
		Local Real Estate, Construction, and Development	3.0%
		Local Retailing of Clothing and General Merchandise	29.2%
		Local Utilities	0.0%
		Total	100.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
Manufacturing	2,500	Aerospace Vehicles and Defense	3.8%
		Agricultural Inputs and Services	0.1%
		Apparel	1.5%
		Automotive	0.4%
		Biopharmaceuticals	1.1%
		Communications Equipment and Services	0.0%
		Construction Products and Services	10.1%
		Downstream Chemical Products	1.1%
		Downstream Metal Products	1.8%
		Fishing and Fishing Products	0.0%
		Food Processing and Manufacturing	12.4%
		Footwear	0.0%
		Furniture	0.7%
		Information Technology and Analytical Instruments	3.7%
		Jewelry and Precious Metals	0.1%
		Leather and Related Products	0.0%
		Lighting and Electrical Equipment	0.1%
		Livestock Processing	40.8%
		Local Commercial Services	2.3%
		Local Food and Beverage Processing and Distribution	2.7%
		Local Health Services	0.0%
		Local Industrial Products and Services	0.7%
		Local Real Estate, Construction, and Development	2.4%
		Medical Devices	0.5%
		Metalworking Technology	0.4%
		Oil and Gas Production and Transportation	0.0%
		Paper and Packaging	0.0%
		Plastics	0.2%
		Printing Services	3.1%
		Production Technology and Heavy Machinery	3.6%
		Recreational and Small Electric Goods	0.4%
		Textile Manufacturing	0.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Tobacco	0.0%
		Trailers, Motor Homes, and Appliances	0.0%
		Upstream Chemical Products	1.9%
		Upstream Metal Manufacturing	0.0%
		Vulcanized and Fired Materials	2.4%
		Water Transportation	0.1%
		Wood Products	1.5%
		Total	100.0%
Accommodation and Food Services	4,419	Hospitality and Tourism	8.2%
		Local Food and Beverage Processing and Distribution	0.5%
		Local Hospitality Establishments	91.3%
		Total	100.0%
Management and Remediation Services	2,789	Business Services	20.7%
		Distribution and Electronic Commerce	0.1%
		Environmental Services	3.9%
		Financial Services	0.1%
		Hospitality and Tourism	0.4%
		Local Commercial Services	52.5%
		Local Financial Services	0.0%
		Local Household Goods and Services	16.8%
		Local Logistical Services	3.8%
		Local Real Estate, Construction, and Development	1.3%
		Local Utilities	0.5%
		Total	100.0%
Construction	2,444	Construction Products and Services	2.4%
		Local Real Estate, Construction, and Development	97.6%
		Total	100.0%
Transportation and Warehousing	2,391	Business Services	2.5%
		Distribution and Electronic Commerce	16.7%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Hospitality and Tourism	0.0%
		Local Logistical Services	45.6%
		Local Motor Vehicle Products and Services	3.2%
		Oil and Gas Production and Transportation	0.5%
		Transportation and Logistics	30.8%
		Water Transportation	0.7%
		Total	100.0%
Utilities	510	Construction Products and Services	1.0%
		Electric Power Generation and Transmission	88.2%
		Local Utilities	10.8%
		Total	100.0%
Professional, Scientific, and Technical Services	1,360	Business Services	49.6%
		Education and Knowledge Creation	1.2%
		Local Commercial Services	25.9%
		Local Financial Services	7.7%
		Local Personal Services (Non-Medical)	2.6%
		Local Real Estate, Construction, and Development	1.3%
		Marketing, Design, and Publishing	11.7%
		Oil and Gas Production and Transportation	0.0%
		Total	100.0%
Other Services (except Public Administration)	2,022	Education and Knowledge Creation	0.0%
		Local Commercial Services	17.8%
		Local Community and Civic Organizations	19.4%
		Local Health Services	2.1%
		Local Household Goods and Services	1.3%
		Local Industrial Products and Services	1.0%
		Local Motor Vehicle Products and Services	33.8%
		Local Personal Services (Non-Medical)	24.7%
		Total	100.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
Real Estate and Rental and Leasing	691	Business Services	0.2%
		Distribution and Electronic Commerce	19.3%
		Hospitality and Tourism	0.0%
		Local Entertainment and Media	0.2%
		Local Health Services	0.0%
		Local Industrial Products and Services	3.8%
		Local Logistical Services	6.8%
		Local Personal Services (Non-Medical)	3.5%
		Local Real Estate, Construction, and Development	66.2%
		Total	100.0%
Educational Services	382	Education and Knowledge Creation	26.0%
		Local Education and Training	71.9%
		Local Hospitality Establishments	1.8%
		Local Personal Services (Non-Medical)	0.3%
		Total	100.0%
Arts, Entertainment, and Recreation	250	Hospitality and Tourism	20.9%
		Local Hospitality Establishments	59.3%
		Performing Arts	19.9%
		Total	100.0%
Mining, Quarrying, and Oil and Gas Extraction	337	Coal Mining	3.4%
		Metal Mining	82.5%
		Nonmetal Mining	14.1%
		Oil and Gas Production and Transportation	0.0%
		Total	100.0%
Unclassified Industry	66	N/A	
Information	257	Business Services	9.4%
		Communications Equipment and Services	12.5%
		Information Technology and Analytical Instruments	0.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Local Entertainment and Media	32.3%
		Local Utilities	32.8%
		Marketing, Design, and Publishing	8.2%
		Music and Sound Recording	1.4%
		Printing Services	0.0%
		Video Production and Distribution	3.4%
		Total	100.0%
Finance and Insurance	781	Financial Services	22.0%
		Insurance Services	5.0%
		Local Financial Services	73.1%
		Total	100.0%
Wholesale Trade	1,838	Distribution and Electronic Commerce	82.4%
		Food Processing and Manufacturing	0.2%
		Livestock Processing	0.0%
		Local Food and Beverage Processing and Distribution	9.4%
		Local Household Goods and Services	0.1%
		Local Industrial Products and Services	2.4%
		Local Motor Vehicle Products and Services	1.5%
		Local Real Estate, Construction, and Development	4.1%
		Total	100.0%
Management of Companies and Enterprises	139	Business Services	100.0%
		Total	100.0%

Source: Southern Border Coalition, Regional Plan; U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

Table G-2
Correspondence Between Identified Education and Workforce Development Industry Clusters (Exhib. 78) and Harvard
Cluster Mapping Project
2023 Job Totals

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
Education and Human Development	8,291	Agricultural Inputs and Services	100.0%
		Fishing and Fishing Products	0.0%
		Forestry	0.0%
		Hospitality and Tourism	0.0%
		Total	100.0%
Public Safety and Government	20,421	Education and Knowledge Creation	4.3%
		Local Education and Training	29.2%
		Federal Government Services	15.4%
		Local Government Services	27.4%
		Local Health Services	9.2%
		State Government Services	14.6%
		Total	100.0%
Health	4,393	Distribution and Electronic Commerce	23.2%
		Food Processing and Manufacturing	0.1%
		Livestock Processing	0.0%
		Local Food and Beverage Processing and Distribution	4.0%
		Local Health Services	70.9%
		Local Logistical Services	1.8%
		Total	100.0%
Business and Entrepreneurship	7,285	Business Services	19.0%
		Distribution and Electronic Commerce	1.8%
		Education and Knowledge Creation	0.2%
		Financial Services	2.4%
		Hospitality and Tourism	0.1%
		Insurance Services	0.5%
		Local Commercial Services	29.4%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Local Community and Civic Organizations	4.8%
		Local Entertainment and Media	0.0%
		Local Financial Services	9.3%
		Local Health Services	0.5%
		Local Household Goods and Services	6.7%
		Local Industrial Products and Services	0.6%
		Local Logistical Services	0.6%
		Local Motor Vehicle Products and Services	8.4%
		Local Personal Services (Non-Medical)	7.0%
		Local Real Estate, Construction, and Development	6.4%
		Marketing, Design, and Publishing	2.2%
		Oil and Gas Production and Transportation	0.0%
		Total	100.0%
Advanced Manufacturing	3,396	Aerospace Vehicles and Defense	2.8%
		Agricultural Inputs and Services	0.0%
		Apparel	1.1%
		Automotive	0.3%
		Biopharmaceuticals	0.8%
		Communications Equipment and Services	0.0%
		Construction Products and Services	7.4%
		Downstream Chemical Products	0.8%
		Downstream Metal Products	1.3%
		Fishing and Fishing Products	0.0%
		Food Processing and Manufacturing	9.1%
		Footwear	0.0%
		Furniture	0.5%
		Hospitality and Tourism	0.1%
		Information Technology and Analytical Instruments	2.7%
		Jewelry and Precious Metals	0.1%
		Leather and Related Products	0.0%
		Lighting and Electrical Equipment	0.1%
		Livestock Processing	29.9%
		Local Commercial Services	10.1%
		Local Food and Beverage Processing and Distribution	2.0%
		Local Health Services	0.0%
		Local Household Goods and Services	0.7%
		Local Industrial Products and Services	1.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Local Motor Vehicle Products and Services	16.7%
		Local Personal Services (Non-Medical)	0.6%
		Local Real Estate, Construction, and Development	1.8%
		Medical Devices	0.3%
		Metalworking Technology	0.3%
		Oil and Gas Production and Transportation	0.0%
		Paper and Packaging	0.0%
		Plastics	0.1%
		Printing Services	2.3%
		Production Technology and Heavy Machinery	2.6%
		Recreational and Small Electric Goods	0.3%
		Textile Manufacturing	0.0%
		Tobacco	0.0%
		Trailers, Motor Homes, and Appliances	0.0%
		Upstream Chemical Products	1.4%
		Upstream Metal Manufacturing	0.0%
		Vulcanized and Fired Materials	1.7%
		Water Transportation	0.1%
		Wood Products	1.1%
		Total	100.0%
Energy, Construction, and Utilities	5,241	Business Services	13.5%
		Coal Mining	0.2%
		Construction Products and Services	1.3%
		Distribution and Electronic Commerce	9.2%
		Education and Knowledge Creation	0.3%
		Electric Power Generation and Transmission	9.0%
		Local Commercial Services	7.0%
		Local Financial Services	2.1%
		Local Household Goods and Services	0.0%
		Local Industrial Products and Services	0.9%
		Local Motor Vehicle Products and Services	0.6%
		Local Personal Services (Non-Medical)	0.7%
		Local Real Estate, Construction, and Development	49.8%
		Local Utilities	1.1%
		Marketing, Design, and Publishing	3.2%
		Metal Mining	0.0%
		Nonmetal Mining	1.0%
		Oil and Gas Production and Transportation	0.0%
		Total	100.0%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
Advanced Transportation & Logistics	6,289	Business Services	11.4%
		Distribution and Electronic Commerce	12.9%
		Education and Knowledge Creation	0.2%
		Hospitality and Tourism	0.0%
		Local Commercial Services	9.9%
		Local Financial Services	1.6%
		Local Food and Beverage Processing and Distribution	3.8%
		Local Household Goods and Services	0.4%
		Local Industrial Products and Services	1.0%
		Local Logistical Services	16.9%
		Local Motor Vehicle Products and Services	25.2%
		Local Personal Services (Non-Medical)	0.9%
		Local Real Estate, Construction, and Development	1.4%
		Marketing, Design, and Publishing	2.5%
		Oil and Gas Production and Transportation	0.2%
		Transportation and Logistics	11.4%
		Water Transportation	0.3%
		Total	100.0%
Retail, Hospitality, and Tourism	8,471	Business Services	0.7%
		Distribution and Electronic Commerce	19.6%
		Food Processing and Manufacturing	0.0%
		Hospitality and Tourism	4.9%
		Livestock Processing	0.0%
		Local Entertainment and Media	0.0%
		Local Food and Beverage Processing and Distribution	15.4%
		Local Health Services	0.0%
		Local Hospitality Establishments	49.1%
		Local Household Goods and Services	1.7%
		Local Industrial Products and Services	0.8%
		Local Logistical Services	0.9%
		Local Motor Vehicle Products and Services	0.3%
		Local Personal Services (Non-Medical)	0.3%
		Local Real Estate, Construction, and Development	5.5%
		Performing Arts	0.6%
		Transportation and Logistics	0.0%
		Total	100.0%
Life Sciences and Biotechnology	3,631	Aerospace Vehicles and Defense	1.7%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Agricultural Inputs and Services	0.0%
		Biopharmaceuticals	0.8%
		Business Services	18.5%
		Communications Equipment and Services	0.0%
		Distribution and Electronic Commerce	12.5%
		Downstream Chemical Products	0.8%
		Education and Knowledge Creation	0.4%
		Fishing and Fishing Products	0.0%
		Food Processing and Manufacturing	6.9%
		Information Technology and Analytical Instruments	2.6%
		Jewelry and Precious Metals	0.1%
		Livestock Processing	28.2%
		Local Commercial Services	11.3%
		Local Financial Services	2.9%
		Local Food and Beverage Processing and Distribution	1.9%
		Local Health Services	0.0%
		Local Household Goods and Services	0.1%
		Local Industrial Products and Services	1.2%
		Local Motor Vehicle Products and Services	0.3%
		Local Personal Services (Non-Medical)	1.0%
		Local Real Estate, Construction, and Development	2.5%
		Marketing, Design, and Publishing	4.4%
		Medical Devices	0.3%
		Oil and Gas Production and Transportation	0.0%
		Plastics	0.1%
		Printing Services	0.0%
		Production Technology and Heavy Machinery	0.0%
		Recreational and Small Electric Goods	0.3%
		Textile Manufacturing	0.0%
		Trailers, Motor Homes, and Appliances	0.0%
		Upstream Chemical Products	1.3%
		Total	100.0%
Information and Communication Technologies (ICT) and Digital Media	1,695	Aerospace Vehicles and Defense	3.6%
		Business Services	41.2%
		Communications Equipment and Services	1.1%
		Education and Knowledge Creation	0.9%
		Information Technology and Analytical Instruments	5.5%
		Local Commercial Services	20.6%

Industry Cluster	2023 Jobs	Harvard Cluster Mapping	Job Distribution
		Local Entertainment and Media	2.0%
		Local Financial Services	6.2%
		Local Personal Services (Non-Medical)	2.1%
		Local Real Estate, Construction, and Development	1.0%
		Local Utilities	5.6%
		Marketing, Design, and Publishing	9.4%
		Music and Sound Recording	0.2%
		Oil and Gas Production and Transportation	0.0%
		Video Production and Distribution	0.6%
		Total	100.0%
Agriculture, Water, and Environmental Technologies	17,239	Agricultural Inputs and Services	56.3%
		Business Services	7.2%
		Construction Products and Services	0.0%
		Distribution and Electronic Commerce	8.5%
		Education and Knowledge Creation	0.1%
		Electric Power Generation and Transmission	2.6%
		Environmental Services	0.6%
		Financial Services	0.0%
		Fishing and Fishing Products	0.0%
		Food Processing and Manufacturing	0.0%
		Forestry	0.0%
		Hospitality and Tourism	0.1%
		Livestock Processing	0.0%
		Local Commercial Services	10.5%
		Local Financial Services	0.6%
		Local Food and Beverage Processing and Distribution	7.4%
		Local Household Goods and Services	2.7%
		Local Industrial Products and Services	0.3%
		Local Logistical Services	0.6%
		Local Motor Vehicle Products and Services	0.2%
		Local Personal Services (Non-Medical)	0.2%
		Local Real Estate, Construction, and Development	0.7%
		Local Utilities	0.4%
		Marketing, Design, and Publishing	0.9%
		Oil and Gas Production and Transportation	0.0%
		Total	100.0%

Source: Southern Border Coalition, Regional Plan; U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).