



Tulare County General Plan Update

Background Report

Tulare County General Plan



December 2007

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1.1 What is a General Plan?

Every city and county in California is required by California Government Code Sections 65100 through 65763 to prepare and maintain a planning document called a general plan. A general plan is designed to serve as the jurisdiction's "constitution" or "blueprint", and guides elected and appointed officials in land use, public infrastructure and services, and resource conservation decisions. All specific plans, subdivisions, public works projects, and zoning decisions must be consistent with the general plan.

The Tulare County General Plan Update and the update process serves several important purposes:

- Create opportunities for meaningful public participation in the planning and decision-making process.
- Describe current conditions and trends impacting the county.
- Identify planning issues, opportunities, and challenges that should be addressed through the General Plan.
- Explore and evaluate the implications of land use and policy alternatives.
- Ensure that the General Plan is current, internally consistent, and easy to use.
- Provide guidance in the planning and evaluation of future land and resource decisions.
- Serve as a vision and framework for the coordinated future growth in Tulare County.

The Background Report is the first report to be published for the General Plan. Other documents will be prepared and released for public review throughout the General Plan update process.

A general plan typically has three defining features:

General. As the name implies, the general plan provides broad, flexible guidance that will be used to make informed future land use and resource decisions in Tulare County.

Comprehensive. A general plan addresses a wide range of social, economic, infrastructure, and natural resource issues. These include

land use, housing, circulation, utilities, public services, recreation, agriculture, biological resources, and many other interrelated topics. The topic areas addressed in the Tulare County General Plan area are listed under Section 1.5.

Long-Range. General plans provide guidance to reach an envisioned future. To successfully achieve its vision, the general plan must include policies and actions that address immediate, mid- and long-term needs.

1.2 Using the General Plan

One key objective to be accomplished through the Tulare County General Plan Update is to make the plan user-friendly. To do this, the General Plan has been divided into several documents so that goals and policies can be easily referenced, while detailed background and environmental information is easy to find and use. The primary General Plan components – the Background Report; Issues and Alternatives; Goals and Policies Report; and Environmental Impact Report – use a consistent numbering system so that readers can easily find corresponding discussions in each of the reports. For example, if information on biological resources that exist in the county today was desired, the reader could turn to Section 9.2 of the Background Report. If the reader wanted to know the county’s policies related to biological resources, they could refer to Section 9.3 in the Goals and Policies Report.

The following paragraphs provide a summary of the five component documents that comprise the Tulare County General Plan Program. The documents marked with a link symbol (§) are linked to each other by using the same internal organization and numbering system described above.

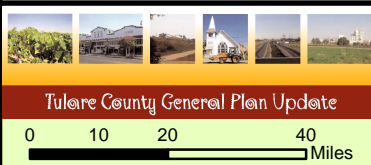
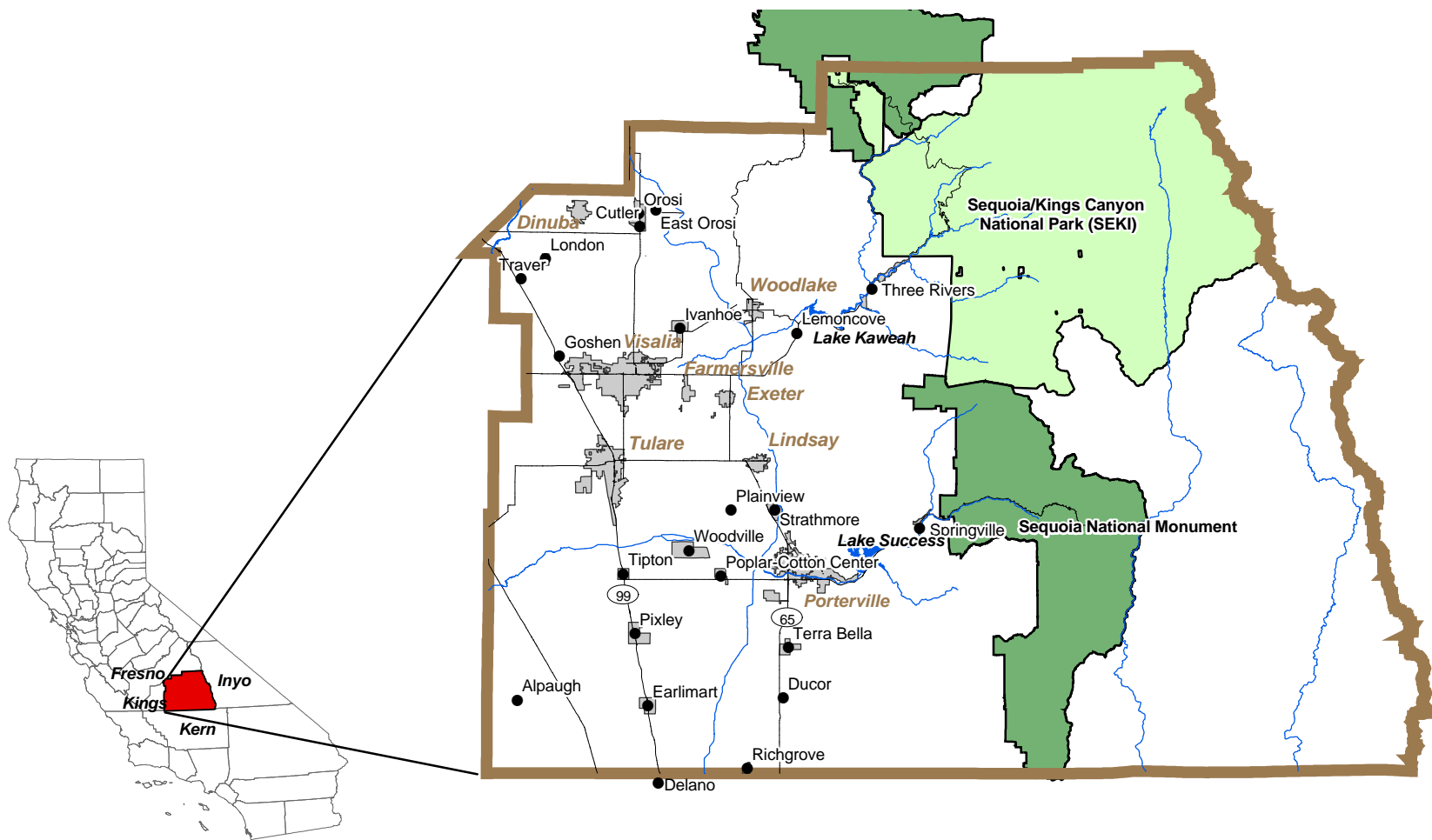
- **General Plan Summary.** This document provides an overview of the General Plan and its component documents. It describes the planning area, summarizes the General Plan goals and policies, provides a brief overview of existing conditions, summarizes the issues raised during the preparation of the General Plan, and identifies its associated environmental impacts.
- § **Goals and Policies Report.** This report is the cornerstone of the General Plan. It contains the goals and policies that will

guide future decisions within the county. It also identifies an integrated set of implementation measures that will ensure its goals and policies are carried out.

- § **Background Report.** This report provides a detailed description of the environmental, economic, land use, public facility, and service conditions that existed within the county during the development of the General Plan. For Tulare County's General Plan, the Background Report reflects conditions within the Planning Area as of January 2004.
- **Issues and Alternatives Report.** This report discusses the major planning issues facing the county and alternative approaches for their appropriate resolution. The report distills the input of the public, members of the Tulare County Board of Supervisors and Planning Commission, other advisory working groups, and county staff.
- § **Environmental Impact Report.** The environmental impact report (EIR) prepared for the General Plan Update will meet the requirements of the California Environmental Quality Act (CEQA). The Tulare County Planning Commission and Board of Supervisors will use the EIR in their review and consideration of the draft General Plan in order to understand the potential environmental implications associated with implementation of the General Plan Update.

1.3 Regional Setting

Tulare County is located in a geographically diverse region with the majestic peaks of the Sierra Nevada framing its eastern region, while its western portion includes the San Joaquin valley floor, which is very fertile and extensively cultivated. Tulare County is the second-leading agricultural-producing county in the U.S. Fresno County is currently (2004) the top producer. In addition to its agricultural production, the county's economic base also includes agricultural packing and shipping operations. Small and medium size manufacturing plants are located in the western part of the county and are increasing in number (Figure 1-1, Regional Location). Tulare County contains portions of Sequoia National Forest, Sequoia National Monument, Inyo National Forest, and Kings Canyon National Park. Sequoia National Park is entirely contained within the county.



LEGEND

- Major Roads
- Rivers
- Lakes
- City Limits
- County Boundary
- Unincorporated Communities

FIGURE 1-1
Regional Location

Tulare County contains more than 4,935 square miles (3,158,400 acres) within its' borders and can be divided into three general topographical zones: a valley region; a foothill region east of the valley area; and a mountain region just east of the foothills. The eastern half of the county is generally comprised of public lands, which include not only the parks listed above, but also the Mountain Home State Forest, Golden Trout Wilderness area, and portions of the Dome Land and south Sierra Wilderness areas. The county also contains one state park and one wildlife refuge. Colonel Allensworth State Park, located in the southwestern corner of the county, provides picnic and camping areas. The Pixley National Wildlife Refuge provides habitat for the endangered blunt-nosed leopard lizard, the San Joaquin kit fox, the Tipton Kangaroo rat, as well as a wintering area for migratory waterfowl.

The main transportation network in the county includes State Route 99, which is the main north-south highway in the county, and State Routes 63, 65, 190, and 198, which connect the major cities and public lands in the county. The major cities of Tulare County include Visalia (pop. 96,750), Tulare (pop. 41,811), Porterville (pop. 37,619), Dinuba (pop. 15,678), and Lindsay (pop. 9,054). The county also contains the Tule River Indian Reservation (California Department of Finance, 2003).

1.4 County Boundaries

The County of Tulare is neighbored by Fresno County to the north and Kern County to the south. Kings County is located on the west side of Tulare County while Inyo County borders the county to the east. The crest of the Sierras forms the boundary with Inyo County. The northern border of Tulare County is an irregular line that passes just south of the City of Reedley and State Route 180. The southern border is a consistent east-west trending line, comprising the south standard parallel south of Mount Diablo, located north of the City of Delano. The western border generally trends north-south in a straight-line north and south just east of Corcoran. Along the eastern border is Inyo County.

1.5 Organization and Purpose of the Background Report

This report is organized into eleven chapters, as follows:

Chapter 1, Introduction. This chapter provides an overview of the Background Report with a description of how to use the General Plan documents and a brief overview of Tulare County's regional setting.

Chapter 2, Market Conditions and Demographics. This chapter addresses countywide market trends and current demographic characteristics.

- Countywide Trends (Section 2.2);
- Economic Character of Unincorporated Areas (Section 2.3);
- Trends in Industry Growth and Concentration (Section 2.4); and
- Demographic Characteristics (Section 2.5).

Chapter 3, Land Use and Population. This chapter addresses land use and population and how these two components affect Tulare County.

- Summary of Existing Plans (Section 3.2);
- Redevelopment Plans (Section 3.3);
- Existing Land Use (Section 3.4);
- Existing Zoning Summary (Section 3.5);
- City General Plans (Section 3.6);
- Spheres of Influence (Section 3.7);
- Surrounding County General Plans (Section 3.8);
- Regional Plan and Policies (Section 3.9); and
- Federal and State Plans and Policies (Section 3.10).

Chapter 4, Agriculture, Recreation, and Open Space. This chapter focuses on recreation and agricultural lands within the study area and identifies open space areas.

- Recreation and Open Space (Section 4.2); and
- Agricultural Resources (Section 4.3).

Chapter 5, Transportation and Circulation. Included in this chapter is a discussion of existing circulation conditions and regulations. This chapter includes discussions on streets and highways, public transportation, bicycles and pedestrian systems, and freight transportation systems.

- Streets and Highways (Section 5.2);
- Public Transportation (Section 5.3);
- Rail Transportation (Section 5.4);
- Non-Motorized Systems (Section 5.5);
- Aviation Systems (Section 5.6);
- Goods Movement (Section 5.7);
- Transportation System Management/Transportation Demand Management (Section 5.8);
- Rural Road Repair (Section 5.9);
- Commute Modes of Transportation (Section 5.10);
- Major Trip Attractors (Section 5.11); and
- Scenic Highway Program (Section 5.12).

Chapter 6, Air Quality. Discussed in this chapter are the existing air quality conditions, state and federal regulations, documented sources of pollutants and a review of control measures.

Chapter 7, Public Services and Utilities. This chapter presents the county's existing utilities, public facilities and public services as well as future needs in these areas.

- Domestic Water Supply (Section 7.2);
- Wastewater (Section 7.3);
- Stormwater Drainage (Domestic Water and Sanitary Sewer) (Section 7.4);

- Solid and Hazardous Waste (Section 7.5);
- Natural Gas and Electric Service (Section 7.6);
- Law Enforcement (Section 7.7);
- Fire Protection (Section 7.8);
- Schools (Section 7.9);
- Communications (Section 7.10);
- Court Services (Section 7.11);
- Library Services (Section 7.12);
- Hospital and Ambulance Services (Section 7.13); and
- Social Services (Section 7.14).

Chapter 8, Safety. This chapter addresses natural and human made hazards in Tulare County.

- Geologic and Seismic Hazards (Section 8.2);
- Flood Hazards (Section 8.3);
- Fire Hazards (Section 8.4);
- Human-Made Hazards (Section 8.5); and
- Noise (Section 8.6).

Chapter 9, Biological, Archaeological and Historical Resources. This chapter identifies biological, archaeological, and historical resources in the study area.

- Biological Resources (Section 9.2); and
- Archaeological and Historical Resources (Section 9.3).

Chapter 10, Natural Resources. This chapter covers water supply and mineral resources in Tulare County.

- Water Resources (Section 10.2);
- Mineral and Petroleum Resources (Section 10.3);

- Oil and Gas Resources (Section 10.4); and
- Timber Resources (Section 10.5).

Chapter 11, Scenic Landscapes. This chapter identifies major visual areas and provides descriptions and photographs.

- Organizing Features (Section 11.2);
- Scenic Corridors and Places (Section 11.3);
- Urban Structures (Section 11.4); and
- Visual Implications of Environmental Issues (Section 11.5).

Chapter 12, References. This chapter contains key references used to prepare this document.

Please see next page

2. MARKET CONDITIONS AND DEMOGRAPHICS

2.1 Introduction

This chapter analyzes trends affecting the economic base and local support industries in Tulare County. It also highlights the key economic characteristics of each of the major unincorporated communities, analyzes industry trends, and provides an overview of county demographics.

This chapter is divided into the following four sections.

- Countywide Trends (Section 2.2);
- Economic Character of the Unincorporated Areas (Section 2.3);
- Trends in Industry Growth and Concentration (Section 2.4); and
- Demographic Characteristics (Section 2.5).

2.2 Countywide Trends

Introduction

Economic base industries are the drivers of local and regional economies. Industries in the economic base draw income into a local economy by selling products or services outside of the local economy, much like the export industries of a national economy. Accrued earnings then circulate throughout the local area in the forms of: wages and salaries; investments; purchase of fixed assets; and goods and services, generating more jobs and wealth. For Tulare County, the economic base consists of agriculture and agricultural-related manufacturing.

In addition to the economic base industries, there are also local support industries, such as retail, the progress of which is a function of the economic base and demographic changes. In the same way that retail, services, and transportation support and depend on economic base industries, major industry divisions that comprise the base likewise depend on each other. For example, milk collected from cows

on farms within the agricultural division, is processed and packaged by dairy products food processors within the manufacturing division, such as milk pasteurizers and makers of cheese, ice cream, and yogurt.

Economic opportunities in the unincorporated area of the county are affected by overall industry growth and decline throughout the county. This chapter highlights recent job growth trends by major industry category, providing a framework for evaluation of more detailed business development opportunities.

Methods

This chapter relies on employment trend data published by the State of California Employment Development Department Labor Market Information Division (EDD-LMID). These data measure jobs reported by employers to the state Unemployment Insurance Program. The job counts include most wage and salary employment but may not include the proprietors themselves or other self employed individuals. Also, the data published by EDD is provided at a general level of industry detail. Some of the tables use more detailed data supplied by the Minnesota IMPLAN Group, which receives employment data directly from the Federal Department of Labor.

Key Terms

- **Economic Base.** The portion of the local economy that primarily sells its goods and services to customers outside the county or local region. These industries draw income into the county that is then recirculated in local-serving (“Non-Basic” businesses such as retail and service establishments.
- **Labor Force.** Persons that are either employed or are actively seeking work.

Regulatory Setting

An economic development section is not required under the state law in the Tulare General Plan. However, Tulare County has decided to include this optional element. It must be consistent with the other required elements of the Tulare General Plan Update.

Existing Conditions

Agriculture comprises the majority of Tulare County's economic base. As Tables 2-1 and 2-2 show, 29 percent of all jobs in the county are in agriculture, compared to 21 percent of the three-county region consisting of Tulare, Kings, and Kern counties. Three percent of all jobs in the state and 29 percent of jobs in Tulare County were related to agriculture in 2002, as Table 2-2 (Employment by Sector, Tulare County, Region and California 2000 – 2002) shows. In absolute terms, the number of agriculture jobs in Tulare County increased by 0.4 percent per year between 1995 and 2000 (see Table 2-1). In the region and state, agricultural jobs decreased by one percent per year over the same time period.

Agriculture continues to be the sector with the greatest number of workers in Tulare County. In 2002, 29 percent of all jobs were in this sector, as Table 2-2 shows. Since 2000, employment in agriculture had increased by two percent per year in Tulare County. Given the significance of the dairy industry in Tulare County, countywide employment growth in agriculture as a whole is possibly linked to increased marketing by the Milk Advisory Board, whose advertising campaigns have promoted Tulare and other California counties' dairy industries through award-winning advertisements touting "Got Milk" and "Happy Cows." In the region and state, agriculture declined by two percent and one percent per year, respectively.

Manufacturing is another important sector in the county. This sector employed 11,700 workers, or eight percent of the total jobs in 2002 as Table 2-2 shows. At the state level, manufacturing accounts for a larger share of total jobs, at 12 percent, whereas for the three county comparison region, manufacturing jobs captured only six percent of all jobs in the year 2002.

While agriculture and manufacturing, particularly food processing, are vital to Tulare County's economy, economic sectors whose fortunes are intimately tied to population growth experienced the most rapid growth. Industries in these sectors are known as "local support industries." As Table 2-2 shows, fastest growing sectors since 2000 have been finance-insurance-real estate, construction, and government. These industries in Tulare County grew annually by 7 percent, 5 percent, 3 percent respectively between 2000 and 2002. As population increases in the Central Valley, "local support industries" such as real estate sell more homes, spurring more jobs in other population-dependent industries such as construction. Government is another "local support sector" and, as Table 2-2 shows, employment

Table 2-1. Employment By Sector, Tulare County, Region and California 1995 – 2000

	Tulare County				Region				California			
	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00
Construction and Mining	3,700	5,000	4%	6%	24,010	25,980	6%	2%	515,400	750,400	5%	8%
Government	23,600	28,300	20%	4%	79,720	92,320	23%	3%	2,107,000	2,318,100	4%	2%
Transportation	3,100	3,600	3%	3%	9,520	12,250	3%	5%	400,100	469,900	3%	3%
Services	17,100	19,600	14%	3%	61,960	73,820	18%	4%	3,728,500	4,612,900	31%	4%
Finance Insurance and Real Estate	3,400	3,700	3%	2%	9,940	11,730	3%	3%	731,900	819,900	5%	2%
Wholesale	4,400	4,700	3%	1%	12,990	13,620	3%	1%	724,500	818,200	5%	2%
Retail	19,200	20,000	14%	1%	58,250	61,970	15%	1%	2,190,600	2,477,400	16%	2%
Agriculture (est.)	39,814	40,641	29%	0.4%	93,915	87,715	21%	-1%	562,825	540,816	4%	-1%
Manufacturing	12,200	12,300	9%	0.2%	25,030	26,200	6%	1%	1,794,200	1,947,800	13%	2%
Communication and Public Utilities	1,100	1,100	1%	0%	4,730	4,560	1%	-1%	230,100	273,700	2%	4%
Total	127,614	138,941	100%	2%	380,065	410,165	100%	2%	12,985,125	15,029,116	89%	3%

Source: Applied Development Economics, based on California EDD/Agricultural employment estimates: Applied Development Economics, based on US Agricultural Census, 1992, 1997 and 2002.

Table 2-2. Employment By Sector, Tulare County, Region and California 2000 - 2002

	Tulare County				Region				California			
	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02
Finance Insurance and Real Estate	3,700	4,200	3%	7%	11,730	12,630	3%	4%	819,900	850,700	6%	2%
Construction and Mining	5,000	5,500	4%	5%	25,980	27,660	7%	3%	750,400	770,100	5%	1%
Government	28,300	30,300	21%	3%	92,320	102,540	24%	5%	2,318,100	2,499,000	16%	4%
Agriculture (est.)	40,641	42,190	29%	2%	87,715	83,980	20%	-2%	540,816	535,256	3%	-1%
Services	19,600	20,300	14%	2%	73,820	77,350	18%	2%	4,612,900	4,687,100	31%	1%
Retail	20,000	20,400	14%	1%	61,970	64,900	15%	2%	2,477,400	2,653,200	17%	3%
Wholesale	4,700	4,700	3%	0%	13,620	13,660	3%	0.1%	818,200	806,500	5%	-1%
Communication and Public Utilities	1,100	1,100	1%	0%	4,560	4,530	1%	-0.3%	273,700	270,500	2%	-1%
Manufacturing	12,200	11,700	8%	-2%	26,110	26,160	6%	0.1%	1,947,800	1,779,000	12%	-4%
Transportation	3,600	3,400	2%	-3%	12,250	11,520	3%	-3%	469,900	441,700	3%	-3%
Total	138,841	143,790	100%	2%	410,075	424,930	100%	1.8%	15,029,116	15,293,056	100%	1%

Source: Applied Development Economics, based on California EDD/Agricultural employment estimates: Applied Development Economics, based on US Agricultural Census, 1992, 1997 and 2002

in this sector increased by three percent per year between 2000 and 2002, a rate of growth that was slightly less than the four percent annual rate of growth between 1995 and 2000.

Not all “local support industries” grew as fast as finance-insurance-real estate, construction or government. Service and retail are other sectors that are also referred to as “local-support industries,” and these sectors grew annually by two percent and one percent between 2000 and 2002, as Table 2-2 shows.

As a proportion of total employment in 2002, the service sector comprised of 14 percent of all jobs in the county. This sector is evenly distributed between business services, health services, and social services-membership organizations, which comprise 25 percent, 24 percent and 20 percent of the service sector. In addition to these service industries, there is “other services,” which is a catch-all term employed by the California EDD for a wide variety of service industries with small employment numbers. Twenty-four percent of all service sector jobs in Tulare County in 2002 are in “other services.” The remaining service industries comprise of amusement-recreation and hotel-lodgings, which comprised of four percent and three percent of all service sector jobs in the county. In term of employment growth between 2000 and 2002, social services-membership organization and amusement-recreation grew the fastest, growing annually by eight and seven percent respectively. Employment in health services increased by three percent per year, while hotel-lodgings experienced zero growth. Employment in business services industries declined by two percent per year between 2000 and 2002, going from 5,200 to 5,000 jobs.

Table 2-3 identifies key industries within the agricultural sector. Forty-five percent of all agricultural jobs in Tulare County, or 18,166 workers, were in crop-producing industries in the year 2000. Employment in agricultural production increased by two percent annually between 1995 and 2000. In contrast, employment in crop and livestock production industries declined in the Region and State, by 0.2 percent per year and three percent per year respectively.

Table 2-4 shows that between 2000 and 2002, agricultural production related jobs continued to increase in the County, growing by seven percent per year between 2000 and 2002. Agricultural service related jobs in the County decreased significantly at three percent annually. The Region experienced a significant increase (six percent per year) in agricultural production jobs, although employment in service jobs

Table 2-3. Employment in Agriculture, Tulare County, Region and California 1995 - 2000

	Tulare County				Region				California			
	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00
Agriculture (est.)	39,814	40,641	100%	0.4%	93,915	87,715	100%	-1%	562,825	540,816	100%	-1%
Production (est.)	16,569	18,166	45%	2%	38,170	37,720	43%	-0.2%	344,174	302,645	56%	-3%
Services (est.)	23,246	22,475	55%	-1%	54,832	49,995	57%	-2%	218,650	238,171	44%	2%

Source: Applied Development Economics, based on California EDD

Note: Agricultural Services sector encompasses a wide array of services sold to farm-oriented enterprises and to non-farm final consumers. These farm-oriented services are essentially intermediate activities, providing inputs for agricultural production.

Table 2-4. Employment in Agriculture, Tulare County, Region and California 2000 – 2002

	Tulare County				Region				California			
	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02
Agriculture (est.)	40,641	42,190	100%	2%	87,715	83,980	100%	-2%	540,816	535,256	100%	-1%
Production (est.)	18,166	20,941	45%	7%	37,720	33,480	43%	-6%	302,645	305,013	56%	0.4%
Services (est.)	22,475	21,249	55%	-3%	49,995	50,500	57%	1%	238,171	230,243	44%	-2%

Source: Applied Development Economics, based on California EDD

2. Market Conditions and Demographics

increased slightly by one percent per year in the short period between 2000 and 2002.

One noteworthy agricultural industry in Tulare County was timber. In the year 2002, timber production in the county amounted to 7,225 million board feet (MBF) of timber, the aggregate value of which was \$1.1 million, according to the California's State Board of Equalization. During 2002, timber production increased by 15 percent per year, whereas in the state as a whole, timber production declined by seven percent per year during 2002. From the vantage point of 1995, timber production in Tulare County actually decreased by five percent annually, going from 10,572 MBF in 1995 to 7,225 MBF in 2002. In the state, timber production declined by four percent per year over that period. In terms of employment, the forestry industry within the agricultural sector employed approximately 81 workers in 2002, an increase of 11 workers over the year 2000 figure of 70 workers. In 1995, this industry employed 119 workers.

Table 2-5 distributes manufacturing employment by a select number of industries at the two-digit SIC level. Of the 12,194 manufacturing jobs in the year 2000, 34 percent were in food processing (SIC 20). Similar to Tulare County, food-processing industries are equally important to the three-county region encompassing 29 percent of all manufacturing jobs. However, the food processing industry experienced a loss of jobs between 1995 and 2000, declining by one percent per year in Tulare County. In the Region, employment in food processing declined by 0.1 percent per year between 1995 and 2000. As discussed later in this section of the report (see Table 2-7), food processing as a whole declined in Tulare County largely because of the declining fortune of the meat products manufacturers (SIC 201), bakery products manufacturers (SIC 205), beverage manufacturers (SIC 208) and miscellaneous manufacturers (SIC 209). Any number of reasons could possibly explain the decline of these food processing industries, from changing diets, to increased productivity through greater reliance on labor-saving technology, and to global competition, in which local food processing manufacturers must compete in domestic and foreign markets with cheaper products from abroad.

Table 2-5 also ranks industries by employment growth, with industries experiencing the greatest growth between 1995 and 2000 at the top of the list. Rubber and miscellaneous plastics (SIC 30) experienced the greatest annual growth in the late 1990s, growing by 15 percent per year between 1995 and 2000. After rubber and miscellaneous plastics, fabricated metal products (SIC 34) and instruments and related

Table 2-5. Manufacturing Employment By Sector, Tulare County, Region and California, 1995 - 2000

	Tulare County				Region				California			
	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00
Manufacturing	12,200	12,300	100%	0.2%	25,030	26,200	100%	1%	1,794,200	1,947,800	100%	2%
Durable	4,400	4,500	37%	0.5%	9,820	10,530	40%	1%	1,089,600	1,222,600	63%	2%
Non-Durable	7,800	7,800	63%	0.0%	15,210	15,670	60%	1%	704,600	725,200	37%	1%
Other non-durable manufacturing	3,506	3,700	30%	1%	7,543	8,035	31%	1%	532,214	538,887	28%	0.2%
Food and kindred products	4,294	4,100	33%	-1%	7,667	7,635	29%	0%	172,386	186,313	10%	2%
Select Manufacturing Industries												
30 Rubber and misc. plastics products	263	535	4%	15%	1,534	1,968	8%	5%	71,987	74,092	4%	1%
34 Fabricated metal products	589	871	7%	8%	1,223	1,693	6%	7%	115,277	130,935	7%	3%
38 Instruments and related products	168	220	2%	6%	504	771	3%	9%	166,853	177,420	9%	1%
26 Paper and allied products	607	736	6%	4%	805	900	3%	2%	39,272	38,380	2%	-0.5%
36 Electronic & other electric equipment	495	555	5%	2%	590	695	3%	3%	223,336	274,807	14%	4%
35 Industrial machinery and equipment	985	1,055	9%	1%	2,168	2,545	10%	3%	195,578	228,341	12%	3%
32 Stone, clay, and glass products	277	275	2%	-0.1%	1,541	1,672	6%	2%	44,350	49,815	3%	2%
20 Food and kindred products	4,294	4,100	34%	-1%	7,667	7,635	29%	-0.1%	172,386	186,313	10%	2%
24 Lumber and wood products	936	893	7%	-1%	1,261	1,165	4%	-2%	50,000	61,622	3%	4%
27 Printing and publishing	1,959	1,807	15%	-2%	2,921	2,659	10%	-2%	148,271	149,023	8%	0.1%
28 Chemicals and allied products	141	118	1%	-3%	612	246	1%	-17%	69,671	81,935	4%	3%
37 Transportation equipment	203	164	1%	-4%	1,494	1,498	6%	0.1%	164,263	152,105	8%	-2%
33 Primary metal industries	678	509	4%	-6%	727	563	2%	-5%	33,190	35,843	2%	2%
23 Apparel and other textile products	351	190	2%	-12%	458	212	1%	-14%	149,181	138,166	7%	-2%

Source: Applied Development Economics, based on California EDD and IMPLAN

2. Market Conditions and Demographics

Products (SIC 38) grew the next fastest in Tulare County, by eight and six percent per year.

In addition to analyzing trends in food processing (SIC 20), it is worth noting trends in the sub-sector of manufacturing industries called durable goods producers. Employment in durable good manufacturing increased by only 0.5 percent per year in Tulare County during the late 1990s, a growth rate that lagged behind that of the region and the state, as shown in Table 2-5. Typically, durable goods producers require high skills, pay the highest wages, and provide higher quality benefits. More importantly, they maintain a wide network of relations with various buyers and suppliers, the transactions of which allow money to be recirculated in the county and region through numerous transactions. Thus, durable goods production is an indication of the maturity of the manufacturing sector.

Between 2000 and 2002, employment in durable goods manufacturing declined by six percent per year, as shown in Table 2-6. Table 2-6 also shows that the other important component to manufacturing – food processing – declined annually by two percent between 2000 and 2002.

Table 2-7 identifies a select mix of food processing industries. Thirty-four percent of all manufacturing jobs are in food processing, which is by far the largest industry within manufacturing sector. Because food processing is a main economic engine of Tulare County, it is important to understand the products that are produced. Seventy-one percent of Tulare County's food processing is comprised of dairy products (SIC 202) and preserved fruits and vegetables (SIC 203) manufacturing. In other words, of the 4,138 jobs in food processing, 1,390 are in dairy products manufacturing and 1,522 are in preserved fruits and vegetables. Overall, employment in food processing declined by one percent per year between 1995 and 2000. Grain mills (SIC 204) experienced substantial increases in employment while preserved fruits and vegetables grew marginally in the late 1990s. For the three-county region, the bulk of food processing is in preserved fruits (SIC 203) and dairy products (SIC 202) sectors, which increased significantly in the late 1990s.

Tulare County has significant tourism and visitor-serving business opportunities, with gateways to the Sequoia and Kings Canyon National Parks, as well as other destinations in the southern Sierra region. Tables 2-8 and 2-9 below identify trends in the county's tourism and visitor-serving industries. Since 2000, employment in

Table 2-6. Manufacturing Employment By Sector, Tulare County, Region and California, 2000 - 2002

	Tulare County				Region				California			
	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02
Manufacturing	12,300	11,700	100%	-2%	26,200	26,160	100%	-0.1%	1,947,800	1,779,000	100%	-4%
Non-Durable	7,800	7,700	63%	-1%	15,670	15,880	60%	1%	725,200	676,300	37%	-3%
Other non-durable manufacturing	3,700	3,800	30%	1%	7,220	6,930	28%	-2%	539,700	500,800	28%	-4%
Food and kindred products	4,100	3,900	33%	-2%	8,450	8,950	32%	3%	185,500	175,500	10%	-3%
Durable	4,500	4,000	37%	-6%	10,530	10,280	40%	-1%	1,222,600	1,102,700	63%	-5%

Source: Applied Development Economics, based on California EDD and IMPLAN

Table 2-7. Manufacturing Employment By Sector, Tulare County, Region and California, 1995 - 2000

		Tulare County				Region				California			
		Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00
		1995	2000	2000	95 - 00	1995	2000	2000	95 - 00	1995	2000	2000	95 - 00
Manufacturing		12,200	12,300	100%	0.2%	25,030	26,200	100%	1%	1,794,200	1,947,800	100%	2%
Select Food Processing Industries													
20	Food and kindred products	4,294	4,138	34%	-1%	7,667	7,635	29%	-0.1%	172,386	186,313	10%	2%
204	Grain mill products	124	298	2%	19%	297	607	2%	15%	8,315	9,273	0.5%	2%
203	Preserved fruits and vegetables	1,313	1,522	12%	3%	2,051	2,555	10%	4%	47,133	42,699	2%	-2%
206	Sugar and confectionery products	324	356	3%	2%	418	452	2%	2%	11,239	11,263	1%	0%
202	Dairy products	1,505	1,390	11%	-2%	2,295	2,165	8%	-1%	14,455	16,138	1%	2%
209	Misc. food and kindred products	613	429	3%	-7%	1,262	1,020	4%	-4%	21,312	23,539	1%	2%
205	Bakery products	115	78	1%	-7%	214	161	1%	-6%	21,407	24,689	1%	3%

Source: Applied Development Economics, based on California EDD and IMPLAN

Table 2-8. Tourism and Visitor Serving Industries, Tulare County, Region and California, 1995 - 2000

	Tulare County				Region				California			
	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00	Employment 1995	Employment 2000	Distribution 2000	Annual Change 95 - 00
Tourism and Visitor-Serving Industries	1,400	1,300	100%	-1%	1,500	1,420	100%	-1%	359,600	408,100	100%	3%
Hotels & Other Lodging Places	700	600	46%	-3%	800	720	51%	-2%	178,700	197,200	48%	2%
Amusement & Recreation Serv.	700	700	54%	0%	700	700	49%	0%	180,900	210,900	52%	3%

Source: Applied Development Economics, based on California EDD

Table 2-9. Tourism and Visitor Serving Industries, Tulare County, Region and California, 2000 - 2002

	Tulare County				Region				California			
	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02	Employment 2000	Employment 2002	Distribution 2002	Annual Change 00 - 02
Tourism and Visitor-Serving Industries	1,300	1,400	100%	4%	1,420	1,550	100%	4%	408,100	406,600	100%	-0.2%
Hotels & Other Lodging Places	600	600	43%	0%	720	750	48%	2%	197,200	191,700	47%	-1%
Amusement & Recreation Serv.	700	800	57%	7%	700	800	52%	7%	210,900	214,900	53%	1%

Source: Applied Development Economics, based on California EDD

these industries has increased by four percent per year, a rate of growth that is significantly better than that of the State as a whole. As shown in the tables below Tulare County captured the bulk of employment in tourism and visitor-serving industries in the three-county region, or 1,400 of the 1,550 jobs in the region in the year 2002.

2.3 Economic Character Of The Unincorporated Areas

Introduction

This section describes key features of selected unincorporated communities in Tulare County. It is intended to provide a context for future consideration of appropriate economic development opportunities in each area.

Methods

The information in this section is based on site visits and discussions with County staff. It will be supplemented by employment data for each community when available from the Tulare County Association Governments (TCAG).

Key Terms

- **Comprehensive Economic Development Strategy (CEDS).** This document is prepared for the entire county including the cities and the unincorporated area for purposes of outlining the economic development plans of each jurisdiction and identifying major infrastructure projects that are needed to stimulate or support economic development. The U.S. Economic Development Administration views the CEDS as a statement of local priorities when considering applications for funding for the identified projects.
- **Redevelopment Project Area.** Under state law, the county may identify and establish areas deemed to be “blighted” and in need of economic assistance. Within these areas, a portion of the property tax growth (Tax Increment Financing) each year may be retained to fund projects that benefit the area, including infrastructure projects, affordable housing and other forms of economic incentives to development.

Regulatory Setting

There is no regulatory setting for this section.

Existing Conditions

The unincorporated valley floor supports most of the agricultural production in the county. Additionally, significant tourism and recreation opportunities exist in the foothills and higher elevations of the Sierra Nevada Mountains. TCAG lists 21 unincorporated communities in its 2003 Tulare County Data Book. Many of the communities located on the valley floor feature a major processing plant serving surrounding food and fiber growing areas, although not exclusively so. Several communities in the foothills offer recreation attractions, lodging and other visitor-serving businesses.

The southern and western parts of Tulare County are dominated by alfalfa, cotton, dairy production operations and milk processing facilities and the northern and eastern portions, located below the elevated foothills, are better suited for grapes and orchards (citrus, olives) production. The Friant Kern Canal transports irrigation water, supporting much of the valley agriculture in Tulare County.

The county has designated eight Redevelopment Project Areas, including Richgrove, Earlimart, Pixley, Goshen, Traver, Cutler-Orosi, Ivanhoe and Poplar-Cotton Center. Additional RDA project areas are under consideration for Terra Bella/Ducor, Strathmore, and Tipton. The County's Comprehensive Economic Development Strategy (CEDS) lists infrastructure improvements planned to support economic development for many of the County's redevelopment project areas. An excerpt from the CEDS can be found in Appendix A. A brief discussion of the current economic highlights of the larger unincorporated communities is provided below.

In addition, if there are several small unincorporated valley communities in the county such as Strathmore, Woodville, Alpaugh, etc., and a number of Foothill and Sierra communities such as California Hot Springs, Posey, and Camp Nelson. The populations of these communities ranges from a dozen or so to 761 (Alpaugh). These communities usually consist of a few square blocks of housing and one to a dozen retail establishments. Lemoncove is included because it is currently affected by gravel mining operations nearby.

- **Cutler/Orosi.** Combined, these are the largest unincorporated communities, with a combined population of more than 12,000. These communities are located on State Route 63 and Avenue 416, in northern Tulare County. The county has sponsored efforts to plan for more commercial development in these communities, which also features a designated industrial park.
- **Goshen and Traver.** Goshen and Traver are the two most visible communities for travelers along State Route 99 (SR 99) north of Visalia. Foster Farms chicken and cattle feed operation dominate the community of Traver, while Goshen has a more diverse employment base as Visalia continues to develop its industrial area west toward the community. Goshen's commercial district is divided along both sides of SR 99. Of all the redevelopment project areas, Goshen has the highest dollar volume of RDA projects underway, as outlined in Appendix A. Planning projects or issues that affect the community include the existing Visalia Airport land use plan, a proposed auto mall at the southwest corner of State Routes 99 and 198, Visalia's industrial park specific plan, the realignment of Betty Drive and its intersection for improved access to the Visalia industrial area, and residential growth on the west side of the town.

A 25 million gallon-per-day ethanol plant broke ground in September 2004 (see the ethanol discussion under Pixley).

- **Lemoncove.** This small roadside community is at the junction of State Routes 198 and 216, near the confluence of the Kaweah and St. John's Rivers. It is at the edge of Tulare County's heaviest sand and/gravel mining areas, operated by RMC Pacific Materials, Kaweah River Rock and Lemon Cove Granite. RMC Pacific recently received approval to begin mining on a new property near SR 245 and Dry Creek Road. Kaweah River Rock and Lemon Cove Granite both have proposed expansions in the permitting states.

- **Pixley.** In the last year or two, there have been a number of proposals for ethanol plants in agricultural areas throughout California to take advantage of expected future demand for ethanol as a gasoline additive. Ethanol fermentation is also a good way to use large amounts of agricultural waste/ biomass such as corn and ag process wastewater while at the same time generating byproducts such as electricity and carbon dioxide that might be used by nearby operations. Ethanol plants typically locate near large biomass sources and require significant rail and truck access.

One such plant has been permitted in Pixley at the Avenue 120 interchange of SR 99 (SW frontage road), an area is not currently in the current RDA project area. One is also proposed for Visalia, and another has started construction in Goshen.

- **Springville.** Located on SR 190, a less-traveled southern access to the Sierras, Springville is an attractive community in the Lake Success recreation area. The Tule Indian Tribe is proposing to build a casino and hotel resort nearby on SR 190. The county is considering designating SR 190 as a scenic highway, and the USFS has completed a marketing plan to enhance outdoor visitation to this portion of the Sierras. The USFS has granted the Sequoia Regional Visitors Council a grant to draft a marketing plan for visitation to this portion of the Sierras. The plan is scheduled for completion in late 2004.
- **Terra Bella.** Terra Bella has a log deck and sawmill owned by Sequoia Forest Industries, from which it receives its supply of lumber from the nearby Sierras. While the company has shut down operations elsewhere (including Soledad), this mill is planned to stay open indefinitely.
- **Three Rivers.** Three Rivers, located northwest of Lake Kaweah, serves as the gateway to Sequoia and Kings Canyon National Parks. The USFS has a marketing plan for visitation to this area. The same visitation marketing plan includes this area. Some businesses in this area have been negatively affected by recent roadwork. The USFS recently completed extensive roadway construction. Some visitor-serving businesses in this area were negatively affected by the rebuilding of SR 198 and have not yet recovered their diminished sales caused by roadway construction and closure.

- **Tipton.** Located on State Route 99 and served by the Union Pacific Railroad (UPRR) line, Tipton features a long strip of undeveloped land along the tracks that is suitable for development by all types of industry. Sunkist has a new plant at the Avenue 144 interchange at the south end of town, and has discussed constructing a cogeneration plant as well. A community plan is under development as well as a proposed new redevelopment project area to be located downtown along the railroad tracks.

2.4 Trends in Industry Growth and Concentration

Introduction

The first part of the chapter identified sectors and industries that make up the economic base of the county. It identified rates of growth for base and local support industries. This section examines data in the context of developments in the county and the state to determine whether growth industries are growing as fast as, or in excess of, similar industries in the region or California. It analyzes whether particular growing industries are concentrated more in Tulare County than elsewhere. The analysis of discrete growth rates, relative growth rates, and levels of concentration, determines those industries in which the region maintains a comparative advantage, as well as those industries that are emerging or declining.

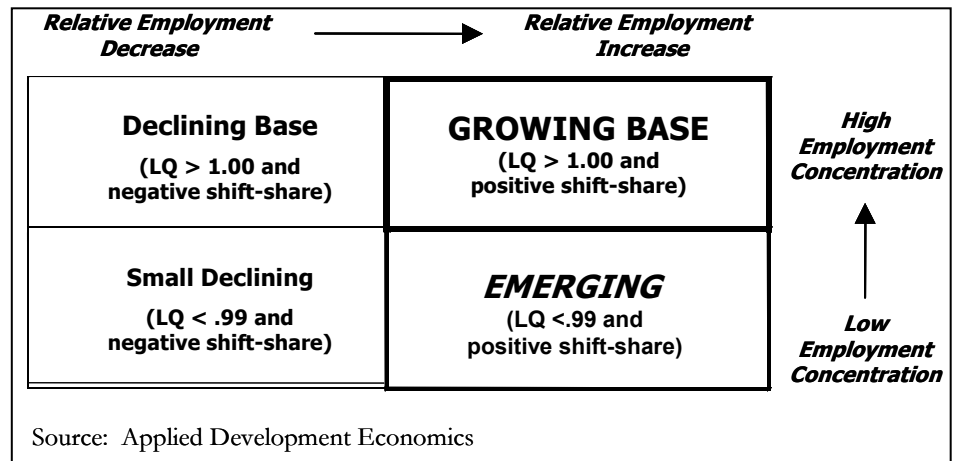
Methods

An important approach for determining employment concentration is called location quotient analysis. The location quotient for a specific industry is the ratio of the number of jobs in a specific industry in a specific place versus all jobs in the same place, compared with the number of jobs in the same specific industry for a larger area (such as the State of California) versus all jobs in the larger area. A location quotient of one ("1.0") means that an industry is distributed within the economy of an area in the same way that it is distributed in the comparison area's economy. Location quotients are also used as indicators of export and import activity. Differences in productivity at the level of establishment, regional labor needs, regional consumption patterns, and quality of products and services are factors that also influence whether an industry exports products and services. As a general rule of thumb, if the location quotient is between 0.80 and

1.25, it cannot be said for certain that an area is a net exporter or importer.

Determining whether specific growth industries are expanding as fast as or even more so than similar industries at higher geographic levels (such as the State of California) is another element to understanding an area's comparative advantage. An important approach for determining the relative growth in employment is called the shift-share analysis.¹ The four-quadrant analysis combines findings from the shift-share and location quotient analyses for specific industries and, in doing so, is an important tool in identifying *growing base*, *declining base*, *emerging*, and *small declining* industries. Figure 2-1 provides a schematic of the four-quadrant analysis.

FIGURE 2-1
Four-Quadrant
Analysis Schematic



The growing economic base includes those industries that generate positive growth rates and whose respective local concentration is greater than 1.00. Industries within this category merit the attention of policy makers and planners, as they are the source of regional wealth-creation and jobs. Moreover, growing economic base industries are those in which a county maintains a comparative economic advantage vis-à-vis other counties, regions or California. To be sure, comparative economic advantage results from a variety of local conditions including availability of specialized marketing organization, easy access to credit, transport facilities, a trained labor force, and the existence of complementary industries.

¹ It is possible that specific product lines can report absolute positive growth between two points in time yet, at the same time, experience a negative shift-share. Textile mills (SIC 22) in a part of the Central Valley region - Kings County - increased by 36 percent, from 162 jobs in 1991 to 220 in 1999. At the same time, in the comparison area - the State of California - textile mills grew even faster, by 76 percent. Thus, Kings County's textile job growth lagged behind that for the region and, as a result, that county experienced a negative shift-share for SIC 22.

The emerging industry sectors are those that are growing in employment but whose local concentration is small compared to the share of the same industry sector in the regional or state economy. Industries within this category are often referred to as “infant industries.” Those merit special attention given their potential to attract other complementary industries and businesses, create regional wealth, and expand the number of jobs.

The declining economic base includes industries that have a high local concentration but have negative growth rates. These industries are somewhat concentrated in an area but, overall, they are not growing at comparable rates of similar industries in other places. It is possible that the unfavorable trend is due to industry-wide restructuring that eventually will strengthen the competitiveness of the affected firms and result in future growth. In any event, identifying the leading causes to negative growth rates is important.

The fourth category includes businesses that capture a small share in the local economy (location quotient less than one) and are declining in employment. This category is not the subject of an in-depth analysis because the types of businesses that comprise this category lack the necessary fundamentals for long-term viability and growth. Industry sectors in this category would normally be considered targets only as part of a strategy to increase the local creation of products or services now being imported to strengthen a local industry cluster.

Key Terms

- **Location Quotient (LQ).** A ratio that compares the percentage that an industry represents of total employment in the county to its percent statewide. A location quotient of one (“1.0”) means that an industry exhibits the same concentration locally that exists statewide. If the LQ is more than 1.0, that industry is more prominent in the county than it is statewide. If the LQ is less than one, the reverse is true.
- **Shift Share.** Compares the rate of industry growth in the county to the rate of growth for the same industry statewide. If industries are growing more rapidly in the county than they are statewide, they are considered to have a competitive advantage locally.

- **Emerging Industries.** Industries that currently exhibit a low concentration in the county but are growing rapidly.

Regulatory Setting

Agriculture and other industries in Tulare County are affected by a wide set of local, regional, state, and international regulations governing trade and the flow of commodities. Internationally, commercial accords such as the North American Free Trade Agreement (NAFTA) and the proposed Free Trade Area of the Americas promise to expand the markets for California food products while, at the same time, opening up US markets to commodities produced by NAFTA members, such as Mexico and Canada. Stakeholders from a various Central Valley industries have voiced concerns about the impact of NAFTA with respect to over-supply of certain commodities, which, in turn could depress market prices received by industries such as growers of farm produce.

In California, Central Valley industries are also affected by state and regional regulations governing air quality, due to a confluence of circumstances ranging from the topography of the region, to the concentrated presence of diesel trucks along Highway 99 and Interstate 5, to agricultural practices that emit particulates into the air in quantities large enough to affect vision and health. For example, industries in the region are subject to the Federal Clean Air Act (1970 and amended twice thereafter), which established the framework for modern air pollution control.

The Clean Air Act directs the Environmental Protection Agency (EPA) to establish ambient air standards for various pollutants. In recent years, the federal EPA had declared that the San Joaquin Valley region does not meet ambient air quality standards. Thus, local and regional officials, in partnership with private industry and the San Joaquin Valley Unified Air Pollution Control Board, are working with state officials in implementing what is known as a “state implementation plan” (SIP), which demonstrates how the region will meet federal air standards. Failing to submit a plan or secure approval could lead to denial of federal funding and permits for such improvements as highway construction and sewage treatment plants.

In addition to meeting federal air quality standards, local and regional officials are also working to meet state regulations per the California Clean Air Act. The California Clean Air Act (CCAA) of 1988 establishes an air quality management process that generally parallels

the federal process. The CCAA, however, focuses on attainment of the state ambient air quality standards, which, for certain pollutants and averaging periods, are more stringent than the comparable federal standards.

Another regulatory regime that affects the regional economy includes the California Air Resources Board (CARB). The CARB regulates mobile emissions sources in California, such as construction equipment, trucks, and automobiles, and oversees the activities of air quality management districts, which are organized at the county or regional level.

Refer to Chapter 6, Air Quality for more detailed discussion on air quality regulations.

In addition to air quality regulations, the local and regional economy are affected by state regulations governing water quality, as well as by local regulations that can also influence economic development. Examples of local regulations include policies on agricultural and other commercial industrial land uses, as well as open space areas, that can be found in city and county governments' respective general plans. Local regulations also include zoning, which stipulate rules regarding allowable and encouraged uses within specified areas.

Existing Conditions

Growing Base Findings

As discussed earlier, agriculture and food processing are critical to the three-county region. These industries comprise the economic base and, not surprisingly, are fixtures in the growing base quadrant of the four-quadrant analysis. Of the ten industries that employ the most people, five are in agriculture. Crop services (SIC 072), dairy farms (SIC 024), general farms (SIC 019), preserved fruits and vegetables (SIC 203) and horticultural services (SIC 018) employ 13,347 workers, or approximately 40 percent of all workers in industries that exhibited "growing base" characteristics in the late 1990s.²

² In performing the "four quadrant analysis," ADE relies on data obtained from the Minnesota IMPLAN Group (MIG). The MIG obtains its data from the US Bureau of Labor Statistics, which, in turn, obtains employment data from states via unemployment insurance reports submitted by all employers to state agencies in charge of tracking employment trends. This dataset is known as "ES202." MIG arranges its ES202 employment data by standard industrial classification (SIC) codes, the finest detail of which is available at the "four digit" SIC level.

Altogether, a total of 33,539 jobs were in industries that exhibited the characteristics of growing base industries in the year 2000. The number of jobs that comprised the growing economic base increased by 16 percent, up from 25,860 in 1995. Agriculture and food processing industries comprise 46.5 percent of all jobs in the growing base in 2000, which underscores the earlier analysis on the prominence of these industries in the economic base. In 1995, economic base industries comprised 47 percent of all growing base jobs, underscoring the importance of these industries throughout the late 1990s.

Table 2-10 ranks the growing base industries in terms of change in employment between 1995 and 2000. If it is generally true that industries with location quotients greater than 1.25 are net exporters of goods and services, then the industries in Table 2-8 represent what are arguably those industries whose export and regional wealth creating potential are the greatest. In 2000, there were 33,539 jobs in 47 growing base industries. Of these jobs, 12,691 were in agriculture (38 percent), 2,912 in food processing (9 percent) and 1,829 in other economic base industries. In other words, 52 percent of all jobs in the growing base are in economic base industries. By the same token, 48 percent of all jobs in the growing base are in local support industries.

Table 2-11 ranks growing base industries by their respective location quotients, or by the extent to which they are concentrated in Tulare County relative to the state. As expected, dairy farms (SIC 024) are the most concentrated industry in the group of industries in the growing base, with a location quotient of 23.6. It also led all categories with an increase of 1,019 jobs or 47 percent.

Table 2-12 ranks growing base industries with the greatest relative growth rates, or shift-share ratios. Interestingly, of these industries, only four recorded shift shares in excess of 1.00, meaning that only four industries grew at rates similar to, or greater than, similar industries elsewhere. Thus, the vast bulk of growing base industries did not grow as fast as comparable industries statewide during the 1995-2000 economic boom. The long-term implications of this finding are, at this point, unclear.

For the purposes of this report, ADE analyzed employment trends via the “four quadrant analysis” using MIG employment figures organized at the “three digit” SIC level.

2. Market Conditions and Demographics

Table 2-10. Growing Base Industries: 1995 – 2000 Tulare County

SIC	Description	Employment Tulare County 1995	Employment Tulare County 2000	LQ 1995	LQ 2000	Change in Study Area Employment 1995-2000	Percentage Change in Study Area Employment 1995-2000
349	Misc. fabricated metal products	44	247	0.338	1.782	203	461%
355	Special industry machinery	67	241	0.421	1.433	174	260%
724	Barber shops	4	12	0.422	2.364	8	200%
655	Sub dividers and developers	78	231	0.630	1.605	153	196%
021	Livestock, except dairy and poultry	234	628	5.547	15.372	394	168%
018	Horticultural specialties	334	887	1.159	2.827	553	166%
517	Petroleum and petroleum products	98	247	1.064	2.688	149	152%
204	Grain mill products	124	298	1.662	3.849	174	140%
549	Miscellaneous food stores	62	142	0.451	1.152	80	129%
308	Miscellaneous plastics products, nec	263	535	0.509	1.023	272	103%
497	Irrigation systems	22	44	5.675	9.616	22	100%
415	School buses	93	181	1.119	2.570	88	95%
569	Misc. apparel & accessory stores	41	76	0.390	1.080	35	85%
029	General farms, primarily livestock and animal specialties	66	116	14.651	21.374	50	76%
519	Misc. nondurable goods	453	772	0.730	1.226	319	70%
836	Residential care	535	849	0.916	1.192	314	59%
544	Candy, nut, and confectionery stores	22	35	0.576	1.084	13	59%
162	Heavy construction, except highway	341	537	0.887	1.389	196	57%
732	Credit reporting and collection	81	127	0.747	1.099	46	57%
557	Motorcycle dealers	31	48	0.994	1.164	17	55%
805	Nursing and personal care facilities	937	1,442	0.861	1.373	505	54%
784	Video tape rental	112	172	0.823	1.067	60	54%
631	Life insurance	486	739	2.287	3.750	253	52%
523	Paint, glass, and wallpaper stores	48	72	0.874	1.283	24	50%
024	Dairy farms	2,174	3,193	17.745	23.644	1,019	47%
593	Used merchandise stores	96	141	0.970	1.185	45	47%
011	Cash grains	22	31	0.987	1.450	9	41%
722	Photographic studios, portrait	66	93	0.831	1.367	27	41%
352	Farm and garden machinery	263	369	9.878	13.937	106	40%
411	Local and suburban transportation	173	240	0.927	1.070	67	39%
515	Farm-product raw materials	84	117	2.782	5.519	33	39%
265	Paperboard containers and boxes	304	405	1.746	2.621	101	33%
762	Electrical repair shops	82	108	0.706	1.204	26	32%
833	Job training and related services	374	490	1.346	1.623	116	31%
801	Offices & clinics of medical doctors	1,466	1,888	0.822	1.008	422	29%
019	General farms, primarily crop	2,263	2,829	8.679	12.865	566	25%
726	Funeral service and crematories	81	100	1.383	1.813	19	23%
071	Soil preparation services	74	91	6.524	8.263	17	23%
203	Preserved fruits and vegetables	1,313	1,522	3.104	4.269	209	16%
508	Machinery, equipment, and supplies	736	847	1.290	1.433	111	15%
276	Manifold business forms	382	437	12.111	17.325	55	14%
531	Department stores	3,719	4,193	1.857	2.253	474	13%
206	Sugar and confectionery products	324	356	3.213	3.786	32	10%
267	Misc. converted paper products	304	331	2.281	2.548	27	9%
072	Crop services	4,731	4,916	11.095	12.273	185	4%
793	Bowling centers	58	56	0.871	1.105	-2	-3%
421	Trucking & courier services, except air	2,195	2,108	1.561	1.717	-87	-4%
	GROWING BASE TOTAL	25,860	33,539			7,679	30%
	Economic Base Industries	13,286	17,432	52.0%		4,146	31%
	Agriculture	9,898	12,691	37.8%		2,793	28%
	Agricultural manufacturing	2,369	2,912	8.7%		543	23%
	Other Basic Industries	1,019	1,829	5.5%		810	79%
	Local Support	12,574	16,107	48.0%		3,533	28%

Source: Applied Development Economics, based on IMPLAN

**Table 2-11. Top Twenty Most Concentrated Growing Base Industries
Tulare County**

SIC	Description	Location Quotient 2000
024	Dairy farms	23.644
029	General farms, primarily livestock and animal specialties	21.374
276	Manifold business forms	17.325
021	Livestock, except dairy and poultry	15.372
352	Farm and garden machinery	13.937
019	General farms, primarily crop	12.865
072	Crop services	12.273
497	Irrigation systems	9.616
071	Soil preparation services	8.263
515	Farm-product raw materials	5.519
203	Preserved fruits and vegetables	4.269
204	Grain mill products	3.849
206	Sugar and confectionery products	3.786
631	Life insurance	3.750
018	Horticultural specialties	2.827
517	Petroleum and petroleum products	2.688
265	Paperboard containers and boxes	2.621
415	School buses	2.570
267	Misc. converted paper products	2.548

Source: Applied Development Economics, based on IMPLAN

**Table 2-12. Top Twenty Relative Growth Rate Growing Base Industries
Tulare County**

SIC	Description	Shift-Share
349	Misc. fabricated metal products	4.468
355	Special industry machinery	2.461
724	Barber shops	2.424
655	Subdivisions and development	1.712
021	Livestock, except dairy and poultry	1.643
018	Horticultural specialties	1.486
517	Petroleum and petroleum products	1.449
549	Miscellaneous food stores	1.327
204	Grain mill products	1.288

**Table 2-12. Top Twenty Relative Growth Rate Growing Base Industries
Tulare County**

SIC	Description	Shift-Share
569	Misc. apparel & accessory stores	1.134
415	School buses	1.035
308	Miscellaneous plastics products, nec	0.946
497	Irrigation systems	0.731
544	Candy, nut, and confectionery stores	0.681
515	Farm-product raw materials	0.638
519	Misc. non-durable goods	0.613
631	Life insurance	0.524
805	Nursing and personal care facilities	0.502
162	Heavy construction, except highway	0.494

Source: Applied Development Economics, based on IMPLAN

Emerging Base Findings

In addition to the growing base, there are also emerging base industries. These industries are not concentrated in Tulare County at comparative levels to the growing base industries, but they merit attention by virtue of their positive shift-share, meaning that, for one reason or another, these industries are growing as fast as, if not faster, than similar industries elsewhere. Altogether, there were approximately 75 emerging base industries consisting of 14,959 jobs in 2000 (see Table 2-13). Interestingly, only nine percent of all emerging base jobs are in economic base industries of agriculture or food processing, with vast bulk of jobs in local support industries. Thus, unlike the situation in the growing base, agriculture or food processing are not significant elements to the region's emerging base.

Declining Base Findings

In contrast to the emerging base quadrant, a different picture emerges in the declining base quadrant. Industries in this quadrant have a positive location quotient and a negative shift-share, meaning that they are concentrated in the county but are declining. The declining base quadrant consists of 38,006 jobs, as shown in Table 2-14. These 38,006 jobs are not at immediate risk of elimination but have experienced relative decline during the 1995-2000 period when compared to similar industries outside of the county. Of these jobs, 22,339 (or 59 percent) are in agricultural economic base industries.

Table 2-13. Emerging Base Industries: 1995 – 2000 Tulare County

SIC	Description	Employment Tulare 1995	Employment Tulare 2000	LQ 1995	LQ 2000	Change in Study Area Employment 1995 - 2000	Percentage Change in Study Area Employment 1995 - 2000	Shift- share
451	Air transportation, scheduled	36	387	0.053	0.382	351	975%	9.152
399	Miscellaneous manufactures	6	50	0.055	0.333	44	733%	6.865
239	Misc. fabricated textile products	4	21	0.019	0.093	17	425%	4.113
628	Security and commodity services	3	18	0.026	0.087	15	500%	4.082
283	Drugs	2	10	0.008	0.030	8	400%	3.527
737	Computer and data processing services	52	270	0.037	0.087	218	419%	2.845
366	Communications equipment	1	4	0.003	0.011	3	300%	2.698
016	Vegetables	24	87	0.080	0.319	63	263%	2.642
829	Schools & educational services, nec	53	195	0.242	0.732	142	268%	2.370
249	Miscellaneous wood products	19	61	0.293	0.983	42	221%	2.183
637	Pension, health, and welfare funds	11	41	0.234	0.595	30	273%	2.153
241	Logging	1	18	0.028	0.613	17	1700%	17.105
131	Crude petroleum and natural gas	5	13	0.046	0.204	8	160%	1.968
505	Metals and minerals, except petroleum	1	3	0.009	0.025	2	200%	1.850
284	Soap, cleaners, and toilet goods	6	15	0.050	0.127	9	150%	1.453
295	Asphalt paving and roofing materials	1	2	0.056	0.135	1	100%	1.103
362	Electrical industrial apparatus	29	60	0.417	0.924	31	107%	1.066
361	Electric distribution equipment	1	2	0.017	0.039	1	100%	1.061
509	Miscellaneous durable goods	144	295	0.317	0.666	151	105%	1.003
651	Real estate operators and leasers	155	285	0.267	0.542	130	84%	0.866
783	Motion picture theaters	68	125	0.412	0.782	57	84%	0.797
881	Private households	339	759	0.406	0.647	420	124%	0.730
542	Meat and fish markets	22	36	0.445	0.823	14	64%	0.684
731	Advertising	15	31	0.056	0.086	16	107%	0.624
342	Cutlery, hand tools, and hardware	35	49	0.312	0.600	14	40%	0.617
154	General building contractors— nonresidential buildings	233	447	0.619	0.950	214	92%	0.575
565	Family clothing stores	134	264	0.302	0.449	130	97%	0.545
799	Misc. amusement, recreation services	492	848	0.401	0.607	356	72%	0.500
866	Religious organizations	123	186	0.622	0.954	63	51%	0.453
821	Elementary and secondary schools	103	183	0.280	0.403	80	78%	0.450
372	Aircraft and parts	9	12	0.012	0.019	3	33%	0.450
563	Women's accessory & specialty stores	16	25	0.284	0.428	9	56%	0.449
226	Textile finishing, except wool	11	20	0.252	0.355	9	82%	0.432
346	Metal forgings and stampings	76	102	0.601	0.932	26	34%	0.412
274	Miscellaneous publishing	17	26	0.212	0.304	9	53%	0.382
251	Household furniture	16	27	0.070	0.097	11	69%	0.376
864	Civic and social associations	192	266	0.513	0.754	74	39%	0.372
794	Commercial sports	21	36	0.193	0.260	15	71%	0.351
384	Medical instruments and supplies	22	36	0.062	0.085	14	64%	0.349
382	Measuring and controlling devices	124	183	0.229	0.321	59	48%	0.344
871	Engineering & architectural services	247	386	0.271	0.373	139	56%	0.343
359	Industrial machinery, nec	97	155	0.296	0.399	58	60%	0.327
513	Apparel, piece goods, and notions	6	8	0.018	0.025	2	33%	0.325
507	Hardware, plumbing & heating equipment	98	146	0.402	0.547	48	49%	0.315
502	Furniture and home furnishings	9	14	0.044	0.060	5	56%	0.311
285	Paints and allied products	30	32	0.539	0.804	2	7%	0.297
735	Misc. equipment rental & leasing	158	228	0.583	0.781	70	44%	0.286
736	Personnel supply services	1,736	3,388	0.648	0.807	1,652	95%	0.268
862	Professional organizations	9	13	0.256	0.334	4	44%	0.254
561	Men's & boys' clothing stores	34	40	0.502	0.671	6	18%	0.230
723	Beauty shops	123	163	0.403	0.520	40	33%	0.221
621	Security brokers and dealers	68	115	0.230	0.281	47	69%	0.203
254	Partitions and fixtures	15	19	0.214	0.267	4	27%	0.174
734	Services to buildings	488	648	0.604	0.715	160	33%	0.122
592	Liquor stores	67	60	0.586	0.727	-7	-10%	0.120
603	Savings institutions	78	74	0.200	0.246	-4	-5%	0.119
289	Miscellaneous chemical products	7	9	0.119	0.140	2	29%	0.115
161	Highway and street construction, except elevated highways	130	197	0.861	0.999	67	52%	0.112
562	Women's clothing stores	132	138	0.464	0.557	6	5%	0.110
452	Air transportation, nonscheduled	7	8	0.185	0.220	1	14%	0.110
271	Newspapers	272	280	0.664	0.761	8	3%	0.064
566	Shoe stores	102	108	0.546	0.622	6	6%	0.059
803	Offices of osteopathic physicians	1	1	0.101	0.114	0	0%	0.048
483	Radio and TV broadcasting	157	194	0.702	0.782	37	24%	0.042
841	Museums and art galleries	4	6	0.085	0.094	2	50%	0.041

2. Market Conditions and Demographics

Table 2-13. Emerging Base Industries: 1995 – 2000 Tulare County

SIC	Description	Employment Tulare 1995	Employment Tulare 2000	LQ 1995	LQ 2000	Change in Study Area Employment 1995 - 2000	Percentage Change in Study Area Employment 1995 - 2000	Shift- share
602	Commercial banks	911	805	0.707	0.792	-106	-12%	0.037
179	Misc. special trade contractors	323	510	0.727	0.799	187	58%	0.035
641	Insurance agents, brokers, and service	449	493	0.637	0.702	44	10%	0.028
751	Automotive rentals, no drivers	51	62	0.263	0.288	11	22%	0.023
571	Furniture and home furnishings stores	373	497	0.861	0.937	124	33%	0.017
616	Mortgage bankers and brokers	79	134	0.268	0.291	55	70%	0.016
729	Miscellaneous personal services	84	110	0.542	0.589	26	31%	0.014
863	Labor organizations	17	19	0.160	0.173	2	12%	0.008
347	Metal services, nec	5	6	0.030	0.032	1	20%	0.005
781	Motion picture production & services	3	4	0.003	0.003	1	33%	0.005
872	Accounting, auditing, & bookkeeping	369		0.496	0.534	22	6%	0.001
	EMERGING BASE TOTAL	9,361	14,959			5,598	60%	
	Economic Base Industries	830	1,286	8.6%		456	55%	
	Agriculture	24	87	0.6%		63	263%	
	Agricultural manufacturing							
	Other Basic Industries	806	1,199	8.0%		393	49%	
	Local Support	8,531	13,673	91.4%		5,142	60%	

Source: Applied Development Economics, based on IMPLAN

Table 2-14. Declining Base Industries: 1995 – 2000 Tulare County

SIC	Description	Employment Tulare 1995	Employment Tulare 2000	LQ 1995	LQ 2000	Change in Study Area Employment 1995 to 2000	Percentage Change in Study Area Employment 1995 - 2000	Shift- share
027	Animal specialties	88	108	5.35	5.73	20	23%	-0.004
572	Household appliance stores	123	120	1.16	1.24	-3	-2%	-0.011
492	Gas production and distribution	148	131	1.65	1.74	-17	-11%	-0.017
335	Nonferrous rolling and drawing	259	292	2.69	2.82	33	13%	-0.031
017	Fruits and tree nuts	6,829	6,770	8.71	9.07	-59	-1%	-0.032
491	Electric services	322	258	1.83	1.89	-64	-20%	-0.035
501	Motor vehicles, parts, and supplies	468	507	1.02	1.06	39	8%	-0.040
356	General industrial machinery	168	176	1.18	1.21	8	5%	-0.047
553	Auto and home supply stores	530	550	1.38	1.42	20	4%	-0.049
076	Farm labor and management services	13,427	14,461	13.39	13.66	1,034	8%	-0.057
554	Gasoline service stations	518	439	1.03	1.02	-79	-15%	-0.073
243	Millwork, plywood & structural members	238	338	1.42	1.44	100	42%	-0.090
273	Books	558	571	7.94	7.83	13	2%	-0.092
769	Miscellaneous repair shops	296	244	1.15	1.11	-52	-18%	-0.101
518	Beer, wine, and distilled beverages	172	161	1.15	1.11	-11	-6%	-0.105
525	Hardware stores	211	235	1.93	1.88	24	11%	-0.115
013	Field crops, except cash grains	995	738	8.83	8.15	-257	-26%	-0.122
494	Water supply	42	51	1.27	1.22	9	21%	-0.141
541	Grocery stores	2,918	2,679	1.29	1.19	-239	-8%	-0.150
598	Fuel dealers	81	69	3.42	3.12	-12	-15%	-0.152
025	Poultry and eggs	292	260	7.40	6.78	-32	-11%	-0.153
591	Drug stores and proprietary stores	724	666	1.23	1.11	-58	-8%	-0.177
202	Dairy products	1,505	1,390	11.60	10.32	-115	-8%	-0.193
556	Recreational vehicle dealers	59	69	1.97	1.81	10	17%	-0.197
636	Title insurance	151	149	1.30	1.16	-2	-1%	-0.201
171	Plumbing, heating, air-conditioning	554	707	1.14	1.05	153	28%	-0.209
422	Public warehousing and storage	277	341	1.63	1.47	64	23%	-0.241
075	Animal services, except veterinary	87	80	1.76	1.50	-7	-8%	-0.244
344	Fabricated structural metal products	425	464	1.53	1.28	39	9%	-0.313
327	Concrete, gypsum, and plaster products	272	274	1.83	1.49	2	1%	-0.318
514	Groceries and related products	1,539	1,145	1.56	1.18	-394	-26%	-0.320
275	Commercial printing	730	493	1.43	1.02	-237	-32%	-0.344
552	Used car dealers	81	90	2.21	1.80	9	11%	-0.362
085	Forestry services	80	70	6.49	4.93	-10	-13%	-0.365
332	Iron and steel foundries	297	192	5.98	4.01	-105	-35%	-0.391
092	Fish hatcheries and preserves	5	1	4.04	1.46	-4	-80%	-0.394
209	Misc. food and kindred products	613	429	3.21	2.18	-184	-30%	-0.405
242	Sawmills and planing mills	360	192	3.37	2.02	-168	-47%	-0.422
245	Wood buildings and mobile homes	183	199	5.60	4.28	16	9%	-0.439
287	Agricultural chemicals	95	40	2.99	1.57	-55	-58%	-0.439
521	Lumber and other building materials	626	558	1.42	1.02	-68	-11%	-0.440
824	Vocational schools	199	110	1.77	1.02	-89	-45%	-0.478
232	Men's and boys' furnishings	289	141	2.74	1.48	-148	-51%	-0.481
244	Wood containers	135	85	3.21	1.81	-50	-37%	-0.573
703	Camps and recreational vehicle parks	65	40	2.20	1.15	-25	-38%	-0.654
097	Hunting and trapping, and game propagation	3	1	3.63	1.30	-2	-67%	-0.667
353	Construction and related machinery	210	74	3.48	1.22	-136	-65%	-0.727
417	Bus terminal and service facilities	5	5	5.63	3.38	0	0%	-0.788
832	Individual and family services	1,523	766	2.96	1.18	-757	-50%	-0.857
414	Bus charter service	92	77	2.90	1.46	-15	-16%	-0.942
	EMERGING BASE TOTAL	39,867	38,006			-1,861	-5%	
	Economic Base	27,833	27,644	72.7%		-189	-1%	
	Agriculture	21,639	22,339	58.8%		700	3%	
	Agricultural manufacturing	613	429	1.1%		-184	-30%	
	Other Basic Industries	5,581	4,876	12.8%		-705	-13%	
	Local Support	12,034	10,362	27.3%		-1,672	-14%	

Source: Applied Development Economics, based on IMPLAN

2.5 Demographic Characteristics

Introduction

This section provides for the assessment of the current and projected population in Tulare County.

Methods

The U.S. Census Bureau, California Department of Finance (DOF), Tulare County Association of Governments (TCAG), and Woods and Poole provided the information in this section. Projected populations by both the DOF and the U.S. Census do not provide long term forecasts to 2025. This has been remedied by using a straight line projection a continuing the compound growth rates from the previous five years, (i.e., 2010 through 2015).

Key Terms

- **Census.** The 10-year period count for population.
- **Estimate.** The approximate calculation of a given record.
- **Projection.** A prediction of future setting based on extrapolations from past observations.

Regulatory Setting

There is no regulatory setting for this section.

Existing Conditions

The California State Department of Finance (DOF) provides population estimates for cities and counties throughout California. According to DOF population estimates, between 1980 and 1990, Tulare County, including its incorporated cities, grew by 18.9 percent from 250,800 to 309,200 persons. From 1990 to 2000 the population grew 1.8 percent per year (5,846 persons). Over the past four years, the county experienced an overall population growth of 7.3 percent, for a total current (2004) population of 396,800. Overall, the county experienced a population increase of 36.8 percent since 1980.

Table 2-15 shows the cumulative population distribution and growth rates between the incorporated cities and the unincorporated area of the county over the last 24 years, in five-year increments.

Overall, growth in the incorporated areas of Tulare County was higher during the 1980s compared with the 1990s, a trend that was seen throughout California. The unincorporated areas of the county experienced a fluctuation in population during the same time, rising at the onset of each decade. More people live in incorporated cities than in the unincorporated area of the county, a testament to Tulare County's rural land use. The unincorporated area of the county is home to approximately 37.1 percent of the county's total population. Major growth has occurred in the largest cities in the county over the past 24 years. Porterville, located southeast of Visalia, has seen an increase of 21,700 persons, 50.3 percent since 1980. Similarly, Tulare gained an additional 24,650 residents for a 51.7 percent increase in population. Finally, Visalia added 50,000 more residents to its 1980 population of 52,700 for a 48.7 percent gain to 102,200 persons.

For the unincorporated areas of the county, growth has been erratic, jumping at the beginning of the 1980s and 1990s before tapering off in the latter part of each decade. However, the unincorporated areas of the county have increased by only 26,675 persons, or 18.1 percent since 1980.

Unincorporated growth is impacted in part by annexation. Annexation removes people from the unincorporated column but adds to the incorporated population.

Population Characteristics

The following tables describe the population characteristics of Tulare County, including the distribution of population by age group, gender, and ethnicity.

Age

Table 2-16 shows the distribution of age groups and compares them between the incorporated and unincorporated areas of the county, and to the total population in Tulare County. The table suggests that the demographic profile of cities and towns is relatively the same. Tulare County has a significant portion (56.5 percent) of its population between the ages of 18 and 64. The incorporated cities have a slightly higher percentage of the population in this age group (at 57.3 percent) than the unincorporated area, which has 55.2 percent between 18 and 64.

Table 2-15. DOF Population Estimates, Tulare County, 2004

Incorporated City	1980 Population	1985 Population	1985 - 1990 Percent Growth	1990 Population	1990 -1995 Percent Growth	1995 Population	1995- 2000 Percent Growth	2000 Population	2000-2004 Percent Growth	2004 Population
Dinuba	10,200	11,000	13.4	12,700	10.5	14,187	9.5	15,678	15.7	18,600
Exeter	5,650	6,325	13.1	7,275	12.0	8,267	4.0	8,613	13.0	9,900
Farmersville	5,650	6,200	0.4	6,225	8.8	6,824	11.4	7,701	21.2	9,775
Lindsay	7,050	7,675	7.8	8,325	5.1	8,768	3.2	9,054	15.4	10,700
Porterville	21,450	24,250	17.2	29,300	12.9	33,636	10.6	37,619	12.8	43,150
Tulare	23,050	26,850	18.8	33,050	15.0	38,903	7.0	41,811	14.1	47,700
Visalia	52,700	60,200	18.6	74,000	17.3	89,524	7.5	96,750	5.8	102,700
Woodlake	4,420	4,870	14.2	5,675	7.2	6,115	5.1	6,443	8.0	7,000
Incorporated	130,200	147,400	16.5	176,600	14.4	206,224	7.8	223,669	10.4	249,525
Unincorporated	120,600	129,800	2.1	132,600	5.4	140,176	2.9	144,292	2.0	147,275
Total County	250,800	277,300	10.3	309,200	10.7	346,400	5.9	367,961	7.3	396,800

Source: California Department of Finance, 2004; Mintier & Associates

Table 2-16. Population by Age, Tulare County, Census 2000

Age Group	Incorporated Cities		Unincorporated Areas		Tulare County Total	
0 – 4 Years	19,892	8.9%	12,934	9.0%	32,826	8.9%
5 – 17 Years	53,888	24.1%	37,538	26.0%	91,426	24.8%
18 – 64 Years	128,220	57.3%	79,632	55.2%	207,852	56.5%
65 and Older	21,858	9.8%	14,059	9.8%	35,917	9.8%
Total	223,858	100%	144,163	100%	368,021	100%

Source: U.S. Census, 2000

Table 2-17 provides the distribution of children among each of the incorporated cities and unincorporated communities with community plans. For a few areas, over 35 percent of the population is under the age of 18 (Dinuba, Earlimart, Farmersville, Lindsay, Poplar/Cotton Center, Pixley, Richgrove, Strathmore, and Woodlake). The unincorporated area of the county has a slightly higher percentage of children (34 percent) than the incorporated area average (33.6 percent). Children make up just over one third of the total county population.

Table 2-17. Children (0 – 17 Years), Tulare County, Census 2000

Location	Children (0-17 Years)	Total Population	Percent Children
Cities			
Dinuba	6,023	16,844	35.8%
Exeter	3,093	9,168	33.7%
Farmersville	3,354	8,737	38.4%
Lindsay	3,912	10,297	38.0%
Porterville	13,570	39,615	34.3%
Tulare	15,213	43,994	34.6%
Visalia	28,615	91,565	31.3%
Woodlake	2,513	6,651	37.8%
Incorporated Total	76,293	226,871	33.6%
Unincorporated Communities			
Cutler-Orosi	4,301	11,809	36.4%
Earlimart	2,782	6,583	42.3%
Goshen	896	2,394	37.4%
Ivanhoe	1,693	4,474	37.8%
Poplar/Cotton Center	605	1,496	40.4%
Pixley	1,031	2,586	39.9%
Richgrove	1,184	2,723	43.5%
Springville	240	1,109	21.6%
Three Rivers	470	2,248	20.9%
Strathmore	996	2,584	38.5%
Other Areas	33,761	103,144	32.7%
Unincorporated Total	47,959	141,150	34.0%
Total County	124,252	368,021	33.8%

Source: Census 2000 Summary Files One (SF1) and Three (SF3)

Table 2-18 compares the elderly population in each incorporated city and unincorporated community (with a community plan) to the total county population. The two cities with the largest proportion of elderly persons are Exeter (11.1 percent) and Visalia (10.9 percent), while the unincorporated communities of Springville and Three Rivers showed the highest senior populations with 23.4 percent and

Table 2-18. Senior Population, Tulare County, Census 2000

Location	65 and Older	Population	Percent Elderly
Cities			
Dinuba	1,527	16,844	9.1%
Exeter	1,019	9,168	11.1%
Farmersville	553	8,737	6.3%
Lindsay	936	10,297	9.1%
Porterville	3,738	39,615	9.4%
Tulare	4,119	43,994	9.4%
Visalia	9,966	91,565	10.9%
Woodlake	500	6,651	7.5%
<i>Incorporated Subtotal</i>	<i>22,358</i>	<i>226,871</i>	<i>9.9%</i>
Unincorporated Communities			
Cutler-Orosi	811	11,809	6.9%
Earlimart	393	6,583	6.0%
Goshen	143	2,394	6.0%
Ivanhoe	257	4,474	5.7%
Poplar/Cotton Center	114	1,496	7.6%
Pixley	188	2,586	7.3%
Richgrove	119	2,723	4.4%
Springville	259	1,109	23.4%
Three Rivers	497	2,248	22.1%
Strathmore	179	2,584	6.9%
Other Areas	2,960	103,144	2.9%
<i>Unincorporated Subtotal</i>	<i>18,393</i>	<i>141,150</i>	<i>13.0%</i>
Total County	47,404	368,021	12.9%

Source: Census 2000 Summary Files One (SF1) and Three (SF3)

22.1 percent, respectively. This high rate for Springville and Three Rivers is likely due to their appeal as communities for retirement. In total, about 47,404 (12.9 percent) of Tulare County residents are over the age of 65.

Gender

As shown in Table 2-19, the number of males and females in the county is about equal, with 50.3 percent male and 49.7 percent female. This is true of both the incorporated and unincorporated areas. The proportion of males to females in cities and unincorporated communities reverses with cities having 51.1 percent female and 48.9 percent male, and unincorporated communities having 47.8 percent female and 52.2 percent male. In one area of the county, Cutler-Orosi, the male population stands out from the other cities and communities with 54 percent. This reflects the presence of large numbers of recently immigrated Hispanic men drawn by agricultural employment.

Table 2-19. Population by Gender, Tulare County, Census 2000

Location	Male	Percent	Female	Percent
Cities				
Dinuba	8,554	50.8%	8,290	49.2%
Exeter	4,416	48.2%	4,752	51.8%
Farmersville	4,428	50.7%	4,309	49.3%
Lindsay	5,215	50.6%	5,082	49.4%
Porterville	19,444	49.1%	20,171	50.9%
Tulare	21,364	48.6%	22,630	51.4%
Visalia	44,167	48.2%	47,398	51.8%
Woodlake	3,425	51.5%	3,226	48.5%
Incorporated	111,013	48.9%	115,858	51.1%
Unincorporated Communities				
Cutler-Orosi	6,371	54.0%	5,438	46.0%
Earlimart	3,413	51.8%	3,170	48.2%
Goshen	1,182	49.4%	1,212	50.6%
Ivanhoe	2,367	52.9%	2,107	47.1%
Poplar/Cotton Center	779	52.1%	717	47.9%
Pixley	1,375	53.2%	1,211	46.8%
Richgrove	1,439	52.8%	1,284	47.2%
Springville	526	47.4%	583	52.6%
Three Rivers	1,090	48.5%	1,158	51.5%
Strathmore	1305	50.5%	1,279	49.5%
Traver	375	51.2%	357	48.8%
Unincorporated Communities	20,222	52.2%	18,516	47.8%
Other Unincorporated	53,775	52.5%	48,637	47.5%
Total County	185,010	50.3%	183,011	49.7%

Source: Census 2000 Summary Files One (SF1) and Three (SF3)

Teen pregnancy is more prevalent in Tulare County than any other county in California. Information used to calculate teen pregnancy is not readily available, however, teen birth rate information is gathered by the California Department of Health Services. This information provides the birth rates for teens 15 to 19 years of age by teen births per 1,000 teen females. While Tulare County has seen an overall drop in its teen pregnancy rate from 2000 to 2003 (78.5 per 1,000 to 71.6 per 1,000), it remains the county with the highest three-year average teen birth rate (74.9 per 1,000) in California, which has an average teen birth rate of only 43.9 per 1,000. This issue is not isolated in Tulare County either. The neighboring counties of Kings, Kern, and Fresno all are in the top seven counties for teen birth rates in California with

72.7, 68.6, and 66.4 per 1,000 each, respectively (California Health and Human Services Department, April 2003).

While information for race/ethnic distribution of teen birth rates is not available at the county level, the state distribution for teen births is available. Table 2-20 shows that the overall rate of teen pregnancy is declining across all racial/ethnic groups. The table goes on to show the distribution of teen birth rates by race/ethnicity along with the percentage. Statewide, a majority (68 percent) of teen births are to Hispanic teens, which represents only 40 percent of the total female teen population. This is followed by white teens, with 17 percent of the teen pregnancies, and African American teens with 8 percent of the pregnancies.

Table 2-20. Teen Pregnancy Rate, State of California, 2003

Race/Ethnicity	Teen Birth Rates (Females Age 15-19 per 1,000)			Teen Pregnancy Percentage	Percent of Total Teen Population
	2000	2001	2002		
Hispanic	78.6	74.9	70.4	68.0%	40.0%
White	22.3	20.3	18.4	17.0%	38.0%
African American	54.0	52.1	43.7	8.0%	7.0%
American Indian	43.0	37.8	37.4	1.0%	0.6%
Asian/Pacific Islander	16.7	15.8	14.4	4.0%	11.0%
2 or More Races	30.1	29.0	26.7	2.0%	3.0%

Source: California Health and Human Services Department, April 2003.

Ethnicity

According to the 2000 U.S. Census, Hispanic or Latino (50.8 percent), and White (41.8 percent) are the largest ethnic groups in Tulare County. The remaining six ethnic group categories represent 7.4 percent of the total population of the county, with African Americans at 1.4 percent, Asians/Pacific Islanders at 3.16 percent, and American Indians at .8 percent as shown on Table 2-21.

Table 2-21. Total Population by Ethnicity, Tulare County, Census 2000

Ethnicity	Persons	Percent
Hispanic or Latino	186,846	50.80
White	153,916	41.80
Asian/Native Hawaiian and Other Pacific Islander	11,714	3.16
African American	5,122	1.40
American Indian	3,011	0.80
Some Other Race	444	0.10
Two or More Races	6,968	1.90
Total	368,021	100.00

Source: Census 2000 Summary Files One (SFI) and Three (SF3)

Tulare County is similar to other central valley counties in that it has a high Hispanic population. This is primarily based on the intense agricultural activities that employ predominantly Hispanic people throughout California. When compared to the state of California (percent Hispanic), Tulare County has a much higher percentage of Hispanic population at 50.8 percent. The average Hispanic population in the incorporated cities is lower than the unincorporated areas of the county at 47.7 and 55.6 percent, respectively. However, there are four incorporated cities that are over 70 percent Hispanic. These are: Woodlake (83.8 percent); Lindsay (78 percent); Dinuba (75.1 percent); and Farmersville (72 percent). Table 2-22 shows the distribution of Hispanic people in the county and compares it to the county's total population. Most cities and unincorporated communities have significantly higher proportions of Hispanics than other ethnic groups.

Table 2-22. Hispanic Population, Tulare County Census 2000

Location	Hispanic Population	Total Population	Percent Hispanic
Cities			
Dinuba	12,647	16,844	75.1%
Exeter	3,507	9,168	38.3%
Farmersville	6,292	8,737	72.0%
Lindsay	8,029	10,297	78.0%
Porterville	19,589	39,615	49.4%
Tulare	20,058	43,994	45.6%
Visalia	32,619	91,565	35.6%
Woodlake	5,575	6,651	83.8%
Incorporated Subtotal	108,316	226,871	47.7%
Unincorporated Communities			
Cutler-Orosi	10,322	11,800	87.5%
Earlimart	5,760	6,583	87.5%
Goshen	1,751	2,394	73.1%
Ivanhoe	3,407	4,474	76.2%
Poplar/Cotton Center	893	1,496	59.7%
Pixley	1,763	2,586	68.2%
Richgrove	2,493	2,723	91.6%
Springville	62	1,109	5.6%
Three Rivers	148	2,248	6.6%
Strathmore	1,771	2,584	68.5%
Traver	552	732	75.4%
Unincorporated Communities	28,922	38,729	74.7%
Other Unincorporated	49,608	102,421	48.4%
Total Unincorporated	78,530	141,150	
Total County	186,846	368,021	50.8%

Source: U.S. Census, 2000

Population Projections

The Department of Finance prepares population projections for all counties in California. The DOF uses a baseline cohort-component method to project population. A baseline projection assumes people have the right to migrate where they choose and no major natural catastrophes or war will befall the state or the nation. A cohort-component method traces people born in a given year through their lives. As each year passes, cohorts change due to the mortality and migration assumptions. New cohorts are formed by applying the fertility assumptions to the women of childbearing age.

Life tables were developed using deaths from the Department of Health Services by gender, race/ethnicity, and age for the period 1970 to 1990. Age-specific, general, and period fertility rates were developed by race/ethnicity and county annually for the period 1970 to 1990. Births to women under 15 and over 44 were added to the births of the youngest and the oldest age groups when computing the fertility rates.

Migration proportions were developed for the two decades between 1970 and 1990 by a survived population method. The 1970 population was aged forward in time to 1980 by adding recorded births to form new cohorts and subtracting deaths to form existing cohorts. The survived population was compared to the 1980 population and differences were assumed to be migration. The ten-year migration was annualized and divided by the total to derive a proportion. The same process was used for the period 1980 to 1990. The migration proportions for the two decades were then averaged and smoothed using a none-cohort average.

Tulare County has seen a 50.3 percent increase in foreign born population over the past ten years. According to the U.S. Census in 1990 there were 51,457 foreign born people residing in Tulare County. By 2000 that number had increased to 83,124, an increase of 31,667. Of the total year 2000 foreign born population, it is estimated that only 21,567 were naturalized citizens, leaving a remainder of 61,557 as temporary or illegal residents. Tulare County's foreign born population is small when compared with all of California (8,864,255 foreign born residents) making up only 0.94 percent of the state total.

Table 2-23 shows the country of origin for the foreign born population in Tulare County and the state of California. As the table shows, a majority of Tulare County's immigrants (84.6 percent) come from Latin American countries and another 10.0 percent from Asian countries. The remaining 5.4 percent are from Europe (4.0 percent), Africa (0.2 percent), Oceania (0.1 percent), and North America (0.7 percent). While the general hierarchy of immigration origins is the same for California, the state as a whole has much more immigration from Asia and Europe and less from Latin America when compared to Tulare County. This is likely due to many Asian and European immigrants settling in costal regions and the high number of Latin American immigrants coming to the agricultural areas of the state, in such areas as Tulare County, to find farm-related jobs.

Table 2-23. Foreign Born Population by Region of Origin, Tulare County, 2000

Region of Origin	Tulare County		California	
	Foreign Born Population	Percentage	Foreign Born Population	Percentage
Latin America	70,330	84.6%	4,926,803	55.6%
Asia	8,586	10.3%	2,918,642	32.9%
Europe	3,347	4.0%	696,578	7.9%
Africa	189	0.2%	113,255	1.3%
North America	86	0.1%	141,779	1.6%
Oceania	586	0.7%	67,131	0.8%
Total	83,124	100.0%	8,864,255	100.0%

Source: Census 2000

The DOF population projections for Tulare County in Table 2-24 show a population increasing from 375,100 in 2000 to 570,900 in 2020. This is an increase of 195,800 persons or a 1.71 percent annual compound growth rate. The consulting team extended the 2.06 percent annual compound growth rate used from 2015 through 2020, to the five-year period 2020–2025, resulting in a countywide population 630,529.

Table 2-24. Department of Finance Population Growth Projection, Tulare County, 1998

Year	Total County	Total Change	Percent Change
2000	375,100	-	-
2003	386,200	11,100	2.8%
2005	422,000	35,800	8.4%
2010	469,800	47,800	10.1%
2015	515,600	45,800	8.8%
2020	570,900	55,300	9.6%
2025 ¹	630,629	59,729	9.5%

¹ This is not a part of the DOF projections. This was calculated by continuing the 1.92 percent compound growth rate from 2015 to 2020 through to 2025.

Source: California Department of Finance, 1998; Mintier & Associates, 2004

Long-range population estimates for Tulare County have also been prepared by the Department of Finance. As Table 2-25 shows, the population in Tulare County is expected to increase from 369,355 in 2000 to 867,482 in 2050, an increase of 498,127. This is an increase of 134.9 percent over the 2000 population. The table also shows the

growth expected for the state. Tulare County's population increases are expected to continue through 2050 at a sustained rate.

Table 2-25 goes on to show which racial groups will grow the most in Tulare County. The Hispanic population is expected to grow the most with an increase of over 452,810, almost triple the current Hispanic population. Other groups, such as Asian/Pacific Islander, American Indian, White, and Multiracial groups are expected to have minimal growth, while the Black population is expected to have low but stable growth. While a majority of this population increase will likely occur in incorporated cities, outlying unincorporated areas of the county will also experience substantial growth.

Table 2-25. Department of Finance Population Growth Projections, Tulare County, 2000 – 2050

Year	2000	2010	2020	2030	2040	2050
Asian/Pacific Islander	12,247	10,713	11,553	13,241	14,781	16,114
American Indian	3,194	6,101	7,899	8,993	10,044	10,969
Black	5,271	7,925	11,439	15,707	19,384	22,976
Hispanic	188,432	271,934	361,295	448,988	541,425	641,242
White	155,960	145,481	145,750	157,301	162,663	169,524
Multiracial	4,251	5,161	5,813	6,236	6,493	6,657
Tulare County	369,355	447,315	543,749	650,466	754,790	867,482
California	34,043,198	39,246,767	43,851,741	48,110,671	51,538,596	54,777,700

Source: California Department of Finance, May 2004.

In addition to the projections made by the Department of Finance, the Tulare County Association of Governments has projected growth for the county. Table 2-26 shows the growth projections through 2025, based on TCAG growth rates extended from 2015 to 2025. As the table shows, cities are expected to grow the most through 2025, while the unincorporated county is anticipated to decrease in population. The TCAG expects an additional 162,159 people to be living in combined incorporated and unincorporated Tulare County by 2025 for a total population of about 530,190.

Table 2-27 shows projected population by ethnicity according to the Department of Finance.

Table 2-26. Tulare County Population Growth Projection, Tulare County, 2000 - 2025

Location	2000	2005	2010	2015	2020	2025 ¹
Cities²						
Dinuba	16,844	18,450	21,000	24,000	27,430	31,350
Exeter	9,168	7,870	11,000	12,250	13,640	15,190
Farmersville	8,737	9,600	11,200	13,000	15,090	17,520
Lindsay	10,297	10,800	11,900	13,000	14,200	15,510
Porterville	39,615	43,250	49,500	56,500	64,490	73,610
Tulare	43,994	47,500	54,200	61,500	69,780	79,180
Visalia	91,565	104,000	110,000	121,500	134,200	148,230
Woodlake	6,651	7,050	7,600	8,200	8,850	9,550
Cities Subtotal	226,871	248,520	276,400	309,950	347,680	390,140
Unincorporated Communities						
Cutler-Orosi	11,809	12,610	13,330	14,050	14,800	15,610
Earlimart	6,583	7,020	7,500	8,000	8,530	9,100
Goshen	2,394	2,550	2,700	2,850	3,010	3,180
Ivanhoe	4,474	4,900	5,200	5,600	6,030	6,500
Poplar/Cotton Center	1,496	1,550	1,600	1,650	1,700	1,760
Pixley	2,586	2,610	2,640	2,680	2,720	2,760
Richgrove	2,723	2,950	3,150	3,400	3,670	3,960
Springville	1,109	1,110	1,120	1,130	1,140	1,150
Three Rivers	2,248	2,610	2,970	3,320	3,710	4,150
Strathmore	2,584	2,750	2,900	3,100	3,310	3,540
Total Unincorporated Communities	38,006	40,660	43,110	45,780	48,620	51,710
Other Unincorporated	103,144	118,359	113,612	104,474	96,070	88,340
Total County²	368,021	407,539	433,122	460,204	492,370	530,190

¹ Year 2020 and 2025 projections use preceding 2010 through 2015 projected growth rates for each city and community.

² Assumes no annexation of unincorporated lands during the duration of the projection.

Note: Includes Woods and Poole, Series 2003 Projection

Source: Census 2000; California Department of Finance; Woods and Poole, Series 2003 Projection; Mintier & Associates, 2004.

Table 2-27. Department of Finance Ethnicity Growth Projection, Tulare County, 2005 - 2025

Group	2005	2010	2015	2020	2025
Hispanic	218,160	245,553	272,630	300,417	329,110
White	153,125	148,983	146,153	143,464	140,902
Asian/Pacific Islanders	12,757	12,313	11,846	11,394	10,965
African American	5,905	6,165	6,459	6,728	7,006
Native American	3,652	3,638	3,666	3,672	3,692
Total	393,599	416,652	440,754	465,675	491,675

Source: California Department of Finance, 1998

The table shows the expected population for Hispanic, White, Asian/Pacific Islanders, African American, and Native American every five years through 2025. As the table shows, the Hispanic population is expected to grow the most, from a population of 218,160 (2005) to about 329,110 (2025) for an increase of 110,950. Whites are expected to decrease in population, as are Asian populations. African American residents are expected to increase slightly and Native American groups are expected to grow very slightly.

2. Market Conditions and Demographics

Please see next page