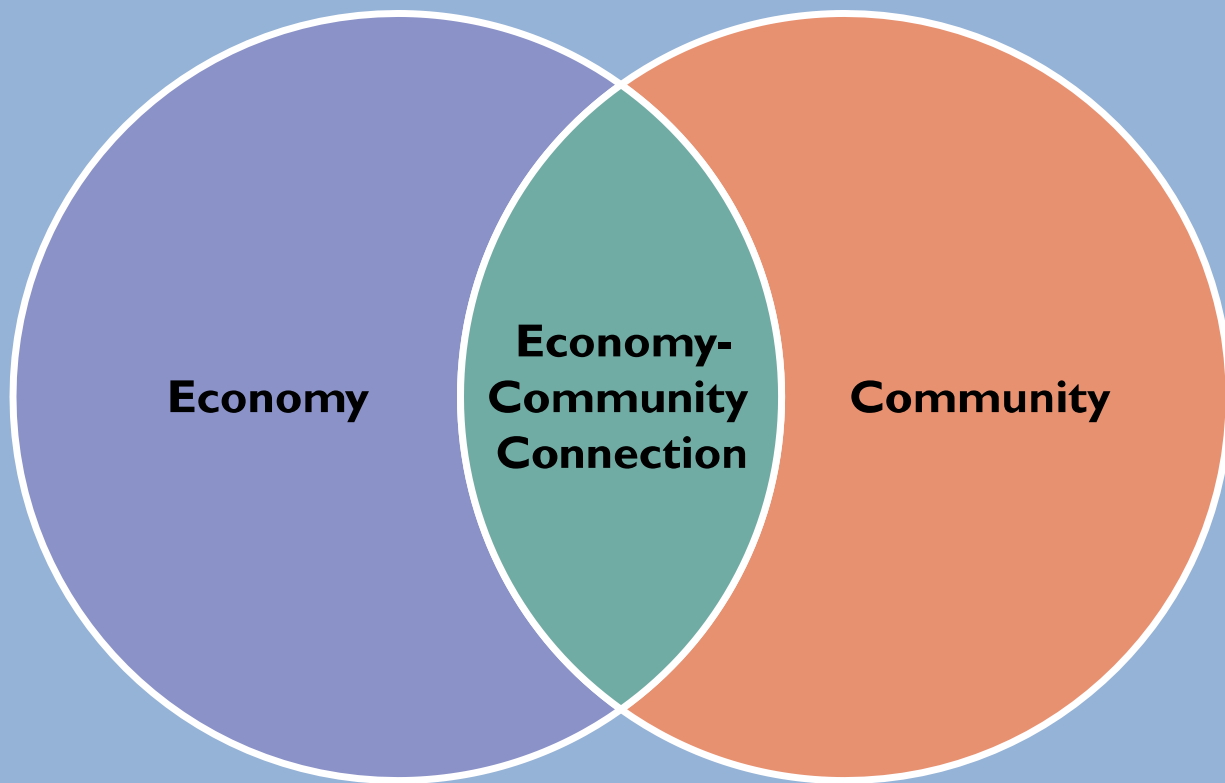


Solano County 2014

Index of Economic and Community Progress

County of Solano and Solano Economic Development Corporation

March 2015



Solano County 2014 Index of Economic and Community Progress

The *Solano County Index of Economic and Community Progress* is a project that was launched in 2007 after a series of economic summits identified a need for more fact-based information to guide efforts by public and private sector leaders to expand Solano County's economy and support its long-term viability.

Three comprehensive editions were produced for 2008, 2009 and 2010 by the consultant Collaborative Economics for the County of Solano and the Solano Economic Development Corporation. These insightful documents provided an objective analysis of key indicators shaping the local economy.

In 2011, the Index became a project for County staff, in cooperation with the Solano EDC, to maintain and update throughout the year. The Index was expanded to include comparisons in many instances to the Sacramento Area, Bay Area, California and the United States. The 2012, 2013 and 2014 editions include the objective analysis of Dr. Robert Eyster from Economic Forensics and Analytics (www.econforensics.com).

All of the annual index reports, as well as several in-depth analyses of local industry clusters, can be found at www.solanocounty.com/economicindex.

It is our pleasure to present the seventh *Solano County Index of Economic and Community Progress*. This report is an annual, in-depth look at the various indicators and trends shaping our local economy. The 2014 Index highlights Solano County's continued economic growth since 2011 and expanding economic base!

Local industry employment, the "gross county product", the housing market, and government revenues are all making positive gains compared to 2013. The 2014 index shows that median household income, personal income and gross domestic product (GDP) per capita are all up in real terms for Solano County.

Our primary goal has been to gather data that gives us a long-term perspective and considerations on economic development. This approach provided a context in which to view today's circumstances and thoughtfully plan strategic actions to build our local economy. The 2014 Index continues this tradition, and the analysis is primarily focused on answering the question: **How are we doing economically?**

The Index explores business and housing affordability measures to help define our quality of life and competitiveness to attract and retain business. New to this edition is a summary of the Index's key highlights and considerations for the future.

This insightful document brings to the forefront areas where collaborative efforts are needed to sustain a thriving economy and ensure our shared economic prosperity. The data also reflect changes happening all around us. Some of these changes we have the ability to influence and grow our prosperity further; there are others changes we cannot as easily control. The empirical data helps us identify opportunities to make a difference. Our collaborative history affirms that we can make things happen once we know what needs to be done.

We challenge you to read this document with an eye to identifying multiple ways in which you can commit to building upon our strengths and to address our challenges so that we can reach our positive vision of the future.

Sincerely,



Erin Hannigan
Chairwoman

Solano County Board of Supervisors



Sandy Person
President

Solano Economic Development Corp.

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Solano County Key Facts



Area

Rural land area	675 square miles
Urban land area	150 square miles
Water area	84 square miles

2014 Population (July 1, 2014)	427,743
Benicia	27,681
Dixon	19,162
Fairfield	110,928
Rio Vista	8,000
Suisun City	28,785
Vacaville	94,388
Vallejo	119,450
Unincorporated	19,349

2014 Population Change

Net Foreign Immigration	+1,063
Net Domestic Migration	+1,496

Top 5 Employment Sectors (2014)

Government	24,000
Education & Health Services	20,800
Retail Trade	18,700
Leisure & Hospitality	14,600
Professional & Business Services	9,200

Total Industry Jobs (Dec 2014)	131,600
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Educational Attainment (2009-13 avg.)

Less than high school	14.0%
High school graduate	23.5%
Some college, no degree	30.6%
Associates degree	9.0%
Bachelor's degree	18.0%
Graduate or Professional degree	10.8%

Age Distribution (2009-13 avg.)

Under 5 years old	6.4%
5 to 19	20.4%
20 to 44	33.6%
45 to 64	27.7%
65 and older	11.9%

Ethnic Composition (2009-13 avg.)

White, non-Hispanic	40.5%
Hispanic	24.5%
Asian, non-Hispanic	14.3%
Black, non-Hispanic	13.7%
Other (including mixed race)	7.0%

Sources:

1. Population data come from the California Department of Finance (www.dof.ca.gov), as of Dec 2014 availability.
2. Employment data come from the California Employment Development Department (www.edd.ca.gov), Dec 2014.
3. Demographic data from the Census' Bureau's American Community Survey (factfinder.census.gov), Jan 2015.

Key Highlights from the 2014 Index

Our Changing Economy

- Solano County expanded with 2,300 new jobs in 2014, growth of 1.8 percent.
- There are 131,600 people working at Solano County businesses, governmental jobs and nonprofits as of January 1, 2015.
- Solano County's seasonally-adjusted unemployment rate is at 6.9 percent as 2015 begins.
- Gross County Product grew by 3.8 percent in 2013, the latest data for Solano County.
- Non-employer businesses, businesses without payrolls, continue to grow in Solano County.
- All standard of living measures are rising in the 2013 data and suggest that 2014 and 2015 will also be years of rising living standards for Solano County.
- Base employment fell a bit in 2014, but locally-serving jobs grew, a sign of economic expansion.
- Wages in Solano County remain very competitive with respect to other counties in Solano County's region, especially the urban, Bay Area counties where wages have risen more quickly.
- Private-sector incomes and jobs are leading the way in Solano County's economic expansion.

Our Changing Community

- Population growth in Solano County was 4,844 people in 2014, growth of 1.15 percent.
- Population growth from domestic immigration (new residents from places inside the United States) was larger in 2014 than foreign immigration to Solano County.
- Solano County's population continues to get older, as do Bay Area and California residents overall.
- Solano and Sacramento counties are forecasted to be the two fastest growing counties in Solano County's region between 2014 and 2060.
- Solano County saw its graduation rates rise above the state of California in 2012-13.
- More county students were UC and CSU ready in 2013 than any school year since 2007-08.
- Housing prices have continued their recovery, and foreclosure activity has slowed immensely, but housing affordability is relatively lower.
- Government revenue from property and sales taxes continues to rise in 2014.

Considerations for the Future

Solano County has moved from recovery into expansion, following the lead of the national, state and Bay Area economies. Solano County still has housing foreclosures, people out of work, slow wage movements upward, and an aging population. However, Solano County's economy continues to grow and create economic opportunities for all county businesses and residents. The challenges represent opportunities for workforce and economic development as we move into 2015 and continued expansion of Solano County's economy. With a growing economy and reduced government resources, the private sector is becoming more of an engine for growth in Solano County.

Index Overview

Solano County's economy is now beyond recovery and in an expansion. This distinction is important because Solano County has now broken away from the 2007-10 recession in many ways. Local labor markets continue to create jobs for both residents and commuters that come to work in Solano County daily; Solano County's residents are finding jobs regardless of where workers live. There are 131,600 people working at businesses in Solano County, and 205,200 residents of Solano County working as of December 2014. The state economy is growing slightly faster than Solano County's economy, but much of California's growth is due to three major areas: the greater Bay Area (an area where Solano County gains from being a part); San Diego; and western Los Angeles. The Sacramento metropolitan statistical area ("MSA") economy is growing at a similar pace to Solano County. Forecasts for the state of California, as provided by both the California Department of Finance (www.dof.ca.gov) and the UCLA Anderson School's forecast (www.anderson.ucla.edu/centers/ucla-anderson-forecast) are in agreement that the state economy will grow through 2017 at a pace of slightly faster than 3.0 percent per year. Because Solano County's economy has historically followed the state economy with a year or so lag -- as shown in previous versions of this Index -- the forecast for Solano County's economy is for continued growth through 2017 and perhaps through 2020.

The 2014 version of this Index focuses on comparing economic data from 2014 to three major years in the recent past: 2007 (start of recession); 2010 (bottom of recession); and 2013 (prior year). In some cases, 2013 data is only available but updated in this Index from last year's version. In those cases, 2007, 2010 and 2012 will be comparison years. Connecting 2010 to 2013 and 2014 depicts Solano County's recovery period and expansion potential as we move into the second half of this decade.

The housing markets' recovery is one of the many economic bright spots for Solano County. 2014 is no exception in terms of median home price growth, or what is normally the gauge of housing wealth in a local area. Housing markets are now selling homes for "normal" reasons and not primarily due to a wave of foreclosures or mass migrations of current homeowners to rental or away from Solano County altogether. An important connection in local economies is the one between housing and labor markets. Housing supply conditions, which have been weak across California, will be a closely-watched data point in 2015, especially as interest rates start to rise; job growth has fueled demand and rising home prices since 2012.

In late 2008, the Federal Reserve quickly moved interest rates down to avoid an even deeper recession than the American economy experienced, and has not made a direct interest rate change since January 2009. Through multiple rounds of what is known as "quantitative easing", or using indirect methods to keep interest rates relatively low, the Federal Reserve has guided the American economy through more than six years of stable and low mortgage and business borrowing rates. The American economy, initially slow to react to a low interest-rate environment, has now grown with more force since 2012, and is forecasted to grow through 2017 at just under or above three percent per year. If interest rates rise a bit in 2015, we may actually see will housing inventories rise to increase real estate market transactions in the short term and then housing markets peak as interest rates continue to rise.

Job creation is happening in almost all major sectors of Solano County’s economy. Looking at data from December 2013 to December 2014 (the latest data at the time of this writing and a reflection of 2014 labor markets overall), Solano County employers hired 2,300 more workers to a total of 131,600. The total industry employment number is the highest year-end since 2005. While jobs growth is slower compared to 2013, this is still positive growth of 1.8 percent. Construction continues to grow, with an expansion of 5.7 percent of jobs in 2014. Health care, financial services, bars and restaurants, tourism services, and government jobs all experienced growth; professional services fell again in 2014 as it did in 2013. Farm employment grew by 200 jobs. Job growth in Solano County is split between how residents find jobs (over 3,800 more county residents found work in 2014) and local employers hiring. As residential employment grows versus local businesses hiring, Solano County can expect more commuting flows, more traffic, more competition, and workforce development needs for Solano County residents.

Gains Continue, More Growth to Come

Solano County’s goods-producing industries grew as a percentage of overall jobs in 2014 versus services. This is a sign of continued diversification for Solano County businesses with more emphasis on export-focused industries (businesses that have customers outside of Solano County primarily); the percentage of government jobs fell versus the state and national economies. Hiring in health care, retail, bars, restaurants, and hotels are growing. Solano County’s growth of jobs that are goods-producing was 3.7 percent in 2014; services jobs grew only 1.4 percent in the private sector. Since December 2010, Solano County employers have hired 8,000 workers, growth of 6.6 percent. The state of California has grown jobs by 9.4 percent since 2010.

**Gains and Losses of Jobs from Dec 2007, 2010 and 2013 compared to Dec 2014
Solano County Employment**

<i>Industry</i>	<i>2007</i>	<i>% Chg</i>	<i>2010</i>	<i>% Chg</i>	<i>2013</i>	<i>% Chg</i>
Retail Trade	200	1.0%	1,700	9.6%	100	0.5%
Bars and Restaurants	400	3.8%	800	7.9%	300	2.7%
Health Care	400	3.6%	800	7.4%	300	2.7%
Financial Activities	(100)	-1.9%	(100)	-1.9%	0	0.0%
Construction	(200)	-2.1%	1,800	24.3%	500	5.7%
Wholesale Trade	300	7.3%	500	12.8%	100	2.3%
Food & Beverage Stores	200	6.3%	500	17.2%	100	3.0%
Other Services	0	0.0%	400	11.4%	0	0.0%
Information (Software and Publishing)	(200)	-14.3%	0	0.0%	100	9.1%
Local Government Education	-2,200	-19.6%	300	3.4%	-100	-1.1%
Total Farm	100	7.1%	400	36.4%	200	15.4%
Manufacturing	(200)	-1.9%	800	8.4%	200	2.0%
State Government Excl. Education	200	4.3%	-	0.0%	100	2.1%
Federal Government	(200)	-5.1%	(800)	-17.8%	0	0.0%
All Other Industries	-1,200	-3.6%	900	2.7%	400	1.2%
Total, All Industries	-2,500	-1.9%	8,000	6.6%	2,300	1.8%

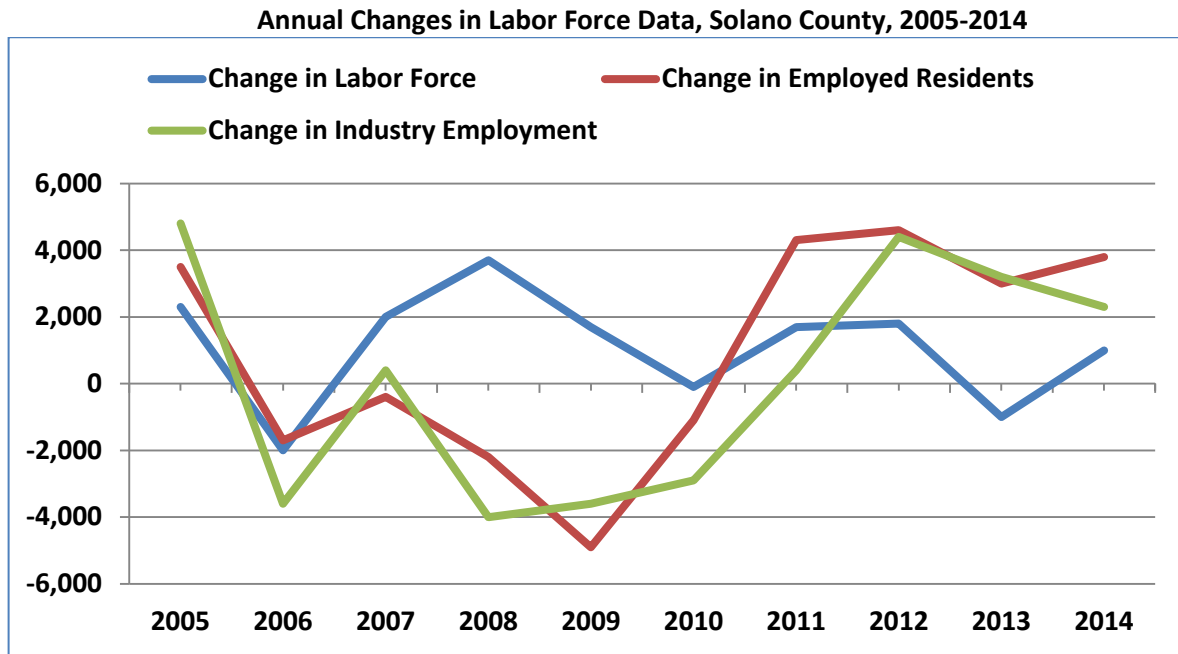
Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information, December to December 2013

The “Information” sector, software development and publishing (books and newspapers), is the fastest percentage growth of all major industry sectors in Solano County at 9.1 percent in 2014, albeit with a small increase in jobs (+100 workers). Financial Activities, industries that stretch from banks to insurance

to real estate, were flat in 2014. Solano County manufacturing continues its comeback in 2014 with 2.0 percent growth. The rest of the Bay Area grew jobs faster than Solano County in 2014. Given positive state and national forecasts, Solano County jobs are also expected to grow to 2017 at least.

Employment and the Labor Force: Solano County beginning to trend growth

Population growth and residential employment are tied through the labor force. If local residents are retiring, or not in the labor force as payroll employees, the growth of local jobs may easily outpace changes in labor force and be slower than population growth. Growth of “non-employer” businesses in Solano County, or smaller businesses that are usually self-owned and operated or provide contract services (1099 contract workers), becomes important to watch. As of 2012, the Census Bureau reports 21,313 such smaller businesses in Solano County, employing over 34,600 people; in 2014 there were 9,642 Solano County payroll businesses estimated by California’s Employment Development Department, employing 103,000 in the private sector. Over 15,700 more Solano County residents are working since Dec 2010. The labor force has grown by only 3,500 people in the same time period.



Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information

Comparison of Labor Force Components, 2005 to 2014, Solano County Number of Workers and Percentage Change in Each Component, Annual Averages

	Labor Force Components					Percentage Change versus 2014			
	2005	2007	2010	2013	2014	2005	2007	2010	2013
Labor Force	209,700	209,700	215,000	217,500	218,500	4.2%	4.2%	1.6%	0.5%
Employed Residents	199,800	197,700	189,500	201,400	205,200	2.7%	3.8%	8.3%	1.9%
Unemployment Residents	9,900	12,000	25,500	16,000	13,300	34.3%	10.8%	-47.8%	-16.9%
Industry Employment	135,000	131,180	121,300	129,300	131,600	-2.5%	-0.2%	8.5%	1.8%

Source: EDD (<http://www.labormarketinfo.edd.ca.gov/>), Labor Market Information

With employed residents rising faster than industry employment, it indicated more Solano County residents are working outside the county lines since 2013.

Solano County and its Cities continue to grow since 2010 in terms of Gross Product

The Bureau of Economic Analysis (BEA) publishes “gross county product” (GCP) data for Solano County annually for the preceding year (2013 is currently the latest year available). This is the sum value of all final goods and services purchased within Solano County’s borders in one year when there is annual data stated. Economists use real values, where inflation is removed from the data, to get a true sense of how purchasing power for workers and residents is changing from earned income. Solano County’s GCP growth was 3.8 percent in 2013. Government (the public sector) has remained a relatively fixed percentage of Solano’s real GCP since 2005, at approximately 23 percent of the county economy in 2010 dollars. In 2007, private sector services accounted for 48.0 percent of Solano County’s economy; this proportion increased to 50.4 percent in 2013.

**Sector Shares of Gross Product in each of the Selected Areas
2005 to 2014 comparisons, Percent of Total Level of Gross Product, 2010 Dollars**

Year	Goods-Producing			Services-Producing			Public Sector		
	CA	Solano	US	CA	Solano	US	CA	Solano	US
2007	18.0%	29.2%	20.2%	68.8%	48.0%	66.7%	13.2%	22.9%	13.0%
2010	16.8%	27.4%	19.1%	69.8%	49.6%	67.3%	13.5%	23.1%	13.6%
2012	16.3%	25.4%	19.3%	70.9%	51.1%	67.8%	12.9%	23.7%	12.9%
2013	16.2%	27.1%	19.6%	71.3%	50.4%	67.8%	12.5%	22.5%	12.6%

Source: Bureau of Economic Analysis (www.bea.gov)

Standards of Living: Three Measures

Standard of living is typically measured as real (inflation-adjusted) gross product per capita or per person, and higher values are considered better. Median household income is another measure, based on a household of four people. Personal income per person is yet another measure, the income available before personal taxes are paid.

**Percentage Change in Standard of Living Measures,
Selected Areas, 2007, 2010 and 2013 Compared to 2014 (the latest data available), 2010 Dollars**

Place	GDP/Capita			Personal Income/Person			Median Household Income		
	2007	2010	2013	2007	2010	2013	2007	2010	2013
California	\$54,308	\$50,909	\$52,835	\$41,346	\$42,282	\$51,572	\$62,737	\$57,664	\$56,878
Solano County	\$36,324	\$34,953	\$33,986	\$37,514	\$38,209	\$45,263	\$69,696	\$62,948	\$62,541
United States	\$43,957	\$42,204	\$43,759	\$37,848	\$40,144	\$47,824	\$53,543	\$50,046	\$49,348

Sources: Bureau of Economic Analysis (www.bea.gov) and Census Bureau (factfinder2.census.gov)

Notice all areas have suffered in terms of GDP per capita since 2007, the peak of last decade’s (2002 - 2007) economic expansion. Data from 2013 shows the gap closing and should be closed by 2014 at the national level. Personal income per person continues to grow, as financial and labor markets *both* provide growing returns. Median household income also continues to improve, providing yet another way to see that both people and families are, on average, gaining from an economic expansion in which Solano County finds itself as 2015 begins.

Community Indicators: Continued Gains and Reduced Challenges

Many of the challenges that have lingered in Solano County's communities since 2008 are showing signs of improvement. Economic expansion supports local communities through rising incomes and wealth. Logic suggests that as families and individuals are better off economically, Solano County's communities have more support from the public *and* private sectors in terms of assistance programs and jobs.

Solano County's population continues is growing

The California Department of Finance (DOF) reports that Solano County's population rose in 2014 by 4,844 people to an estimated level of 427,743. DOF projects Solano's population to be approximately 586,900 by 2050 and 620,600 in 2060. These recent estimates were reduced from 2013 estimates that were used in the 2013 Index report. Solano County remains projected to grow faster than both California on average and the Bay Area outside Solano County. Sacramento County is projected to be over 2 million people by 2050.

Solano County's population has grown since 2010 due mainly to foreign immigrants versus new residents from other parts of the United States. However, in 2014 population growth was more balanced between foreign and domestic immigration to Solano County. Overall population growth was 1.15 percent in 2014.

Expanding ethnic diversity continues in Solano County and is projected through 2060 to be predominantly Hispanic and Asian. After 2030, Solano County will experience uniform population growth between the ages of 18 and 64, the classic, working-age population with some accelerated population growth based on younger residents of working age. Solano County is aging, but doing so slower than its North Bay county neighbors, but more quickly than the more urban, Bay Area counties.

Education data suggest dropout rates better, more students ready for CSU and UC than 2013

Education data for Solano County shows more good news and fewer challenges than the 2013 version, though challenges still remain. The dropout rate fell for the 2012-13 academic year, the latest data reported by the California Department of Education, to 4.0 percent. Dropouts remain predominantly African-American and Pacific Islander, with a quick reduction of African-American dropouts in the 2012-13 school year. Asian students are showing continued progress and lower dropout rates, as well as larger numbers being UC/CSU ready upon graduation. **Overall, there has been steady growth in eligibility for CSU and UC campuses; Solano County remains slightly behind the state average, but is closing the gap.**

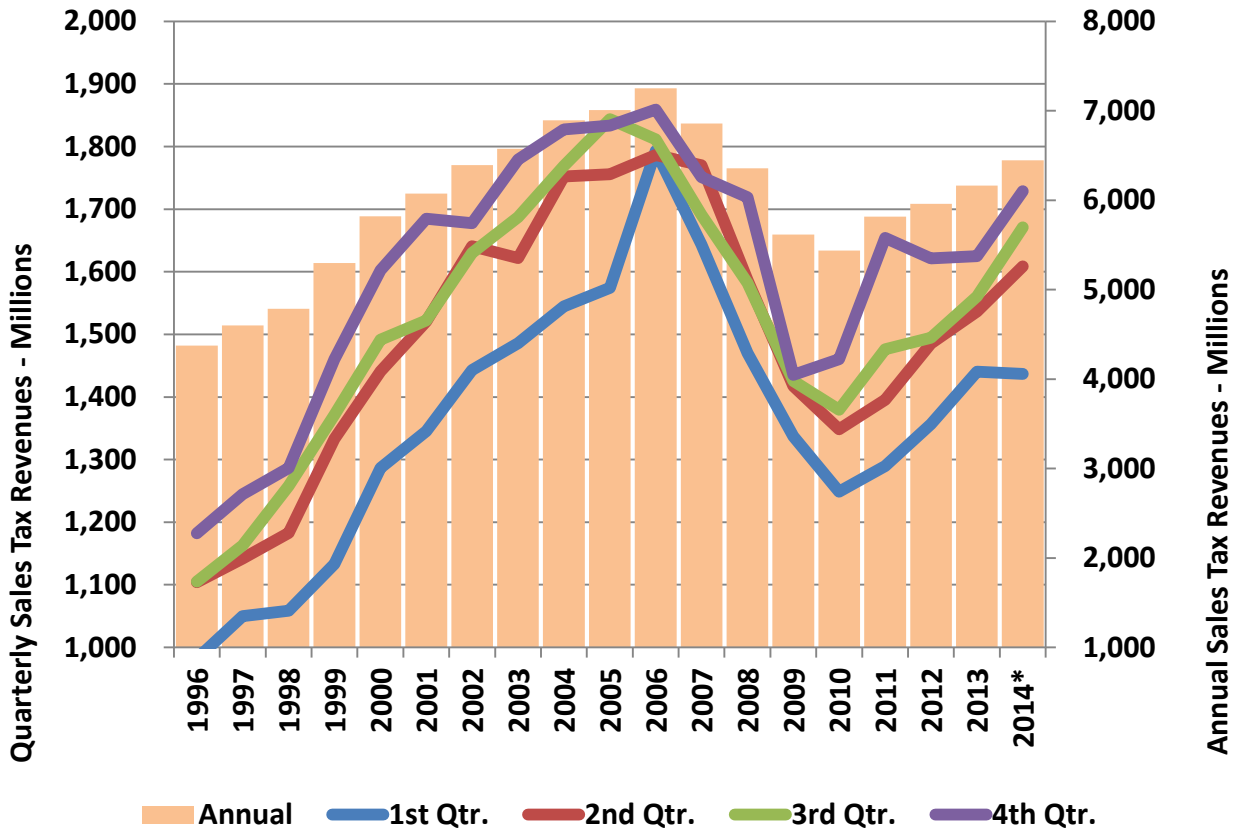
Housing Markets see continued growth in 2014

Housing markets continue to build and recover wealth for Solano County homeowners. The momentum started in 2012, became surging growth in 2013, continued to grow at a slower pace in 2014. Generally, the growth of median home prices outpaced initial estimates by the California Association of Realtors. This is due to interest rates not rising as expected, and few units of inventory coming on the market. Housing prices increased 10.4 percent in Solano County from December 2013 to December 2014; the state of California experienced on 5.5 percent growth over the same time. Prices are up 58 percent since the bottom in 2011 in Solano County.

Government Revenue continues to rise

The combination of rising home prices and taxable sales suggests that there will be continued increases on the revenue side for Solano County’s government. Taxable sales decreased 0.2 percent in the first quarter of 2014 after inflation adjustments versus 2013 quarter 1, but the next two quarters (Q2 and Q3) are reported to have growth of 4.7 and 7.1 percent year on year. Taxable sales have grown by 18.5 percent since 2010 when taxable sales hit bottom.

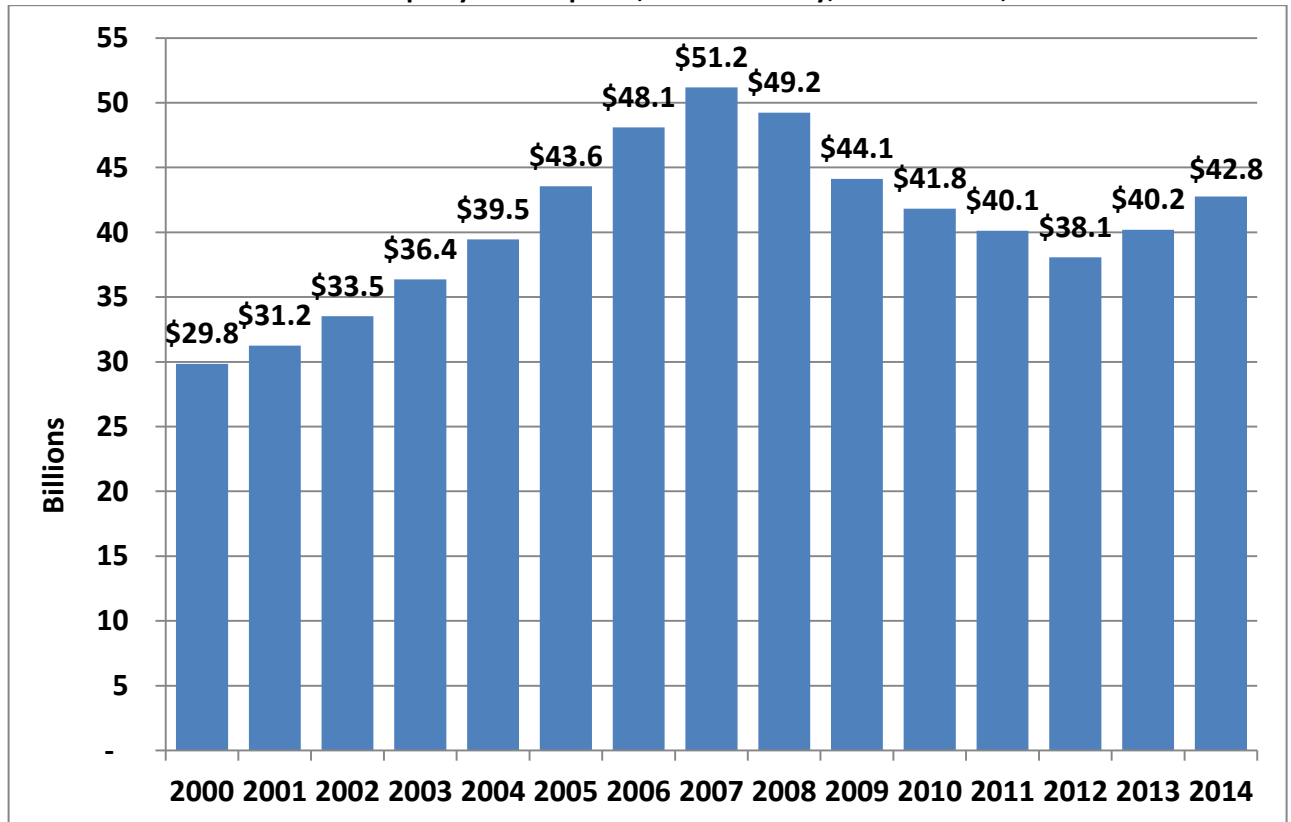
Taxable Sales Data, 1996 to 2014 (estimated to year end), 2010 Dollars, Solano County



Source: California Board of Equalization (<http://www.boe.ca.gov/news/tsalescont.htm>);* 2014's Q4 data is an estimate.

The next figure shows the assessed value of properties in Solano County. These values are used to set the annual tax roll by the Solano County Assessor’s Office, and reflect housing market activity. Improving housing market conditions, as discussed in the 2014 Index, allowed 24,883 properties in Solano County to change from Proposition 8 status and return to Proposition 13 valuations. What this means is more property tax revenue for the county of Solano as we head into 2015.

Assessed Values for Property Tax Purposes, Solano County, 2000 to 2014, 2010 Dollars



Source: Solano County Assessor's Office

Geographic Comparisons

Unless stated otherwise, the 2014 Index uses the following areas in California for comparison regularly, which can be seen as defining a “super region” which includes Solano County.

- Bay Area otherwise: San Francisco, Santa Clara, Alameda, San Mateo, Contra Costa, and Marin counties;
- North Bay: Sonoma and Napa counties;
- Sacramento Metropolitan Statistical Area (MSA): Sacramento, Placer, El Dorado, and Yolo counties (Yuba and Sutter are added as part of Sacramento’s MSA for housing data to stay consistent with earlier Index versions).

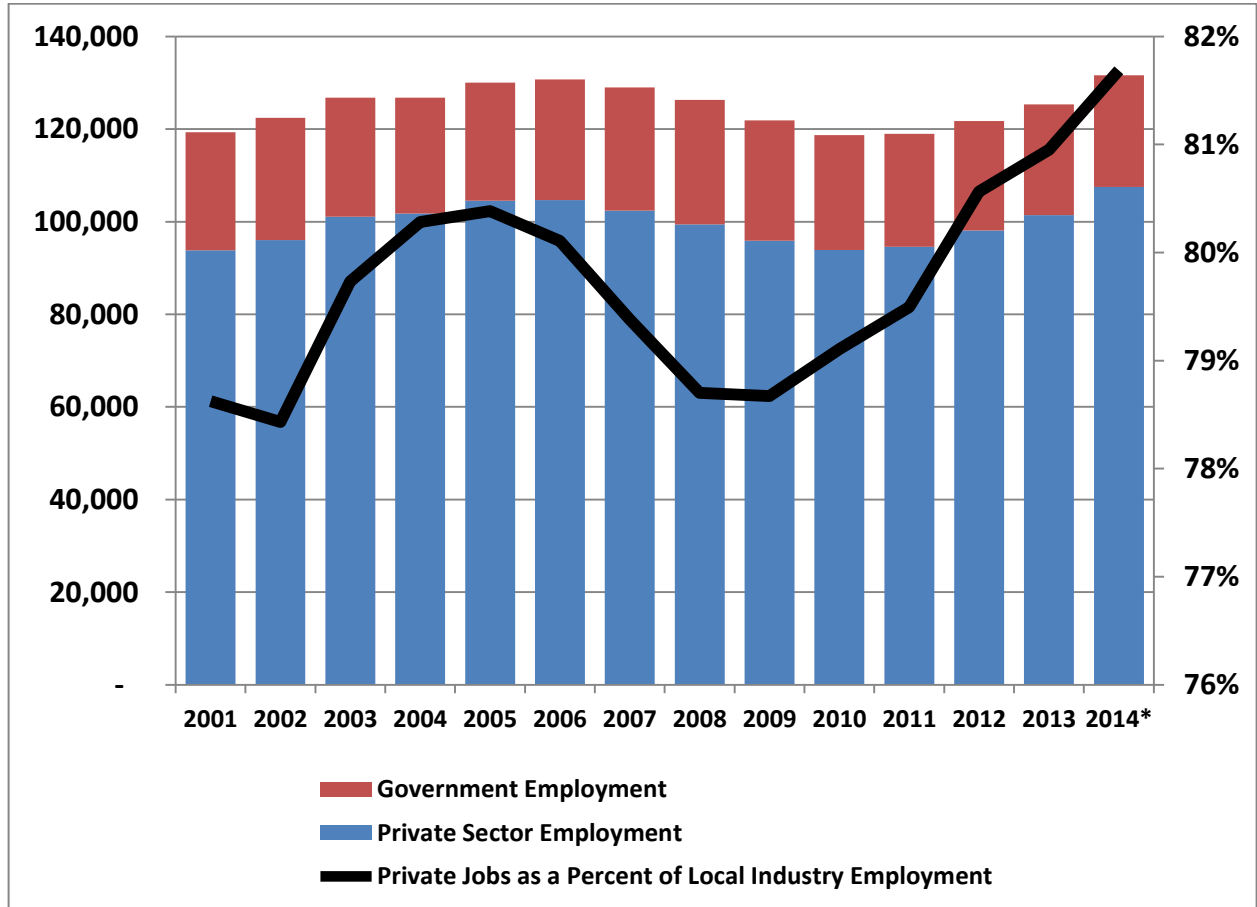
Takeaways and What Is Important

Each subsection of this report also provides a brief “TAKEAWAY” and “WHAT IS IMPORTANT” for the reader as a way to summarize what the data say and a consideration about how that specific data affects the current or future Solano County economy. Let’s look at the changing economy in Solano County.



Annual Local Industry Employment (2000 – 2014), Sector Breakdown

Employment in Solano County grew in 2014 by 2,300 jobs or 1.8 percent growth. This is a slower rate of growth from 2013; Solano County experienced 3.4 percent jobs growth in 2013. The private sector gains of 2,100 jobs were beset by 200 new jobs across all areas of government. As suggested in previous versions of this index, Solano County lagged California overall in terms of emergence from the recent recession. Data here are based on December 2014 labor market estimates as compared to previous years.



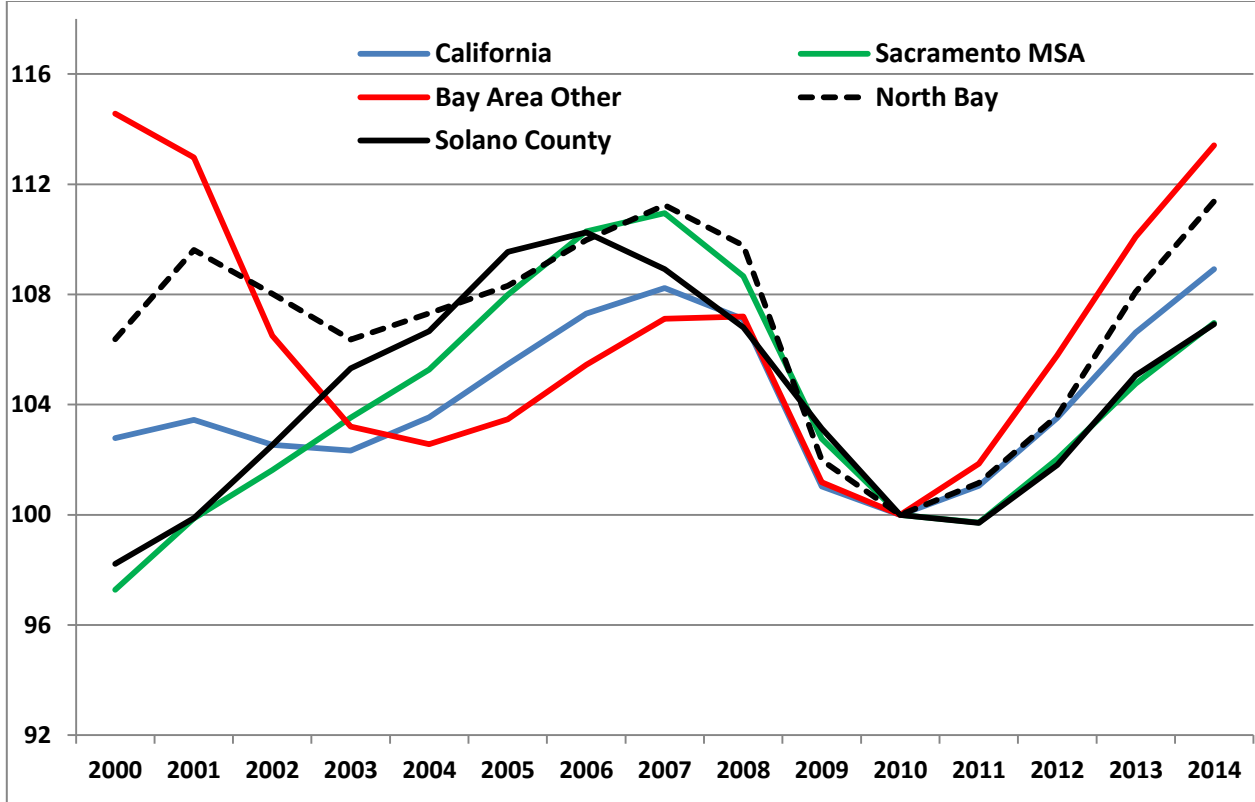
Source: California Employment Development Department (www.edd.ca.gov), *2014 is an average of Jan 2014 to Dec 2014

In 2014, local government is 63.4 percent of overall public-sector workers, where state government employment (local to Solano County) grew slightly and federal government hiring was flat. The number of overall, estimated workers in the public sector is only 100 fewer workers in 2014 than in 2000.

TAKEAWAY: Solano County private and public employers continued to hire workers in 2014, though overall growth in countywide hiring was slower than in 2013.

WHAT IS IMPORTANT: 2015 looks to be a continued year of jobs growth; the 2014 slowdown in percentage growth is likely a sign that 2013 was a breakout year for Solano County and 2014 the first year of economic expansion versus recovery.

**Gain or Loss in Industry Employment (Non-Farm), 2000-2014
Comparisons between Selected Areas, Index 2010 = 100**



Source: California Employment Development Department (www.edd.ca.gov)

**Change in Total Industry Employment
(Gain or Loss in Percentage Terms of Total Jobs for Solano County Employers)**

Place	2005-14	2010-14	2013-14
Solano County	-2.4%	6.9%	1.8%
California	3.3%	8.9%	2.2%
Sacramento MSA	-0.9%	7.0%	2.1%
Bay Area Other	9.6%	13.4%	3.0%
North Bay	2.8%	11.4%	3.0%

Source: www.edd.ca.gov

Looking across the region, the percentage change in total industry employment over 2014 was slower in Solano County than in comparable areas. All compared areas experienced job losses in the Great Recession of 2007-10; The North Bay counties of Napa and Sonoma hit bottom before Solano’s and Sacramento’s MSAs did and have shown better growth since 2010 as a result. Solano County and Sacramento’s MSA are experiencing similar job growth since 2010.

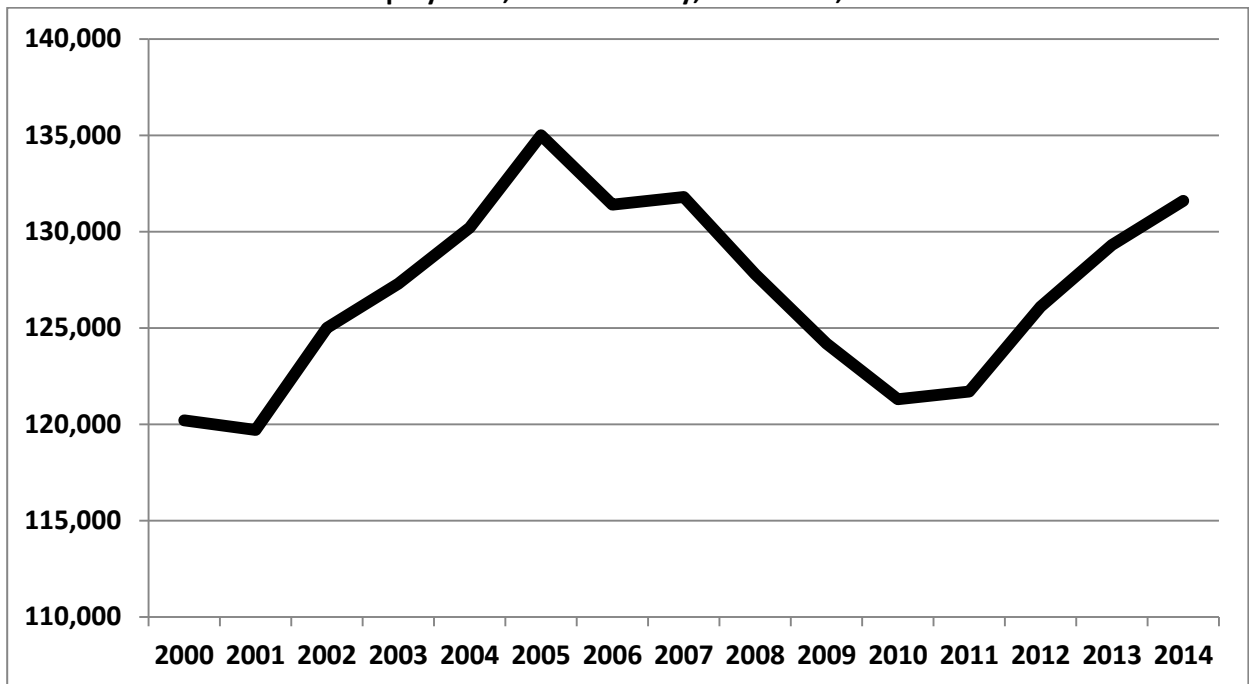
TAKEAWAY: Solano County’s labor markets grew quickly in 2013 and have recovered from the recent recession.

WHAT IS IMPORTANT: Solano County lags the overall Bay Area in terms of labor market recovery.

Total Non-Farm Employment

The labor market began to grow in 2011 for Solano County, and has generated 11,300 jobs since. For the Bay Area outside Solano County, the recovery has brought back almost 203,000 jobs or 7.4 percent growth in employment since 2011. Napa and Sonoma combined generated 13,500 jobs since 2011, or 5.8 percent growth. California, as mentioned above, grew about 4.8 percent, which represents about just over 701,000 workers. Sacramento grew about 2.6 percent or 21,600 jobs since 2011. Since 2011, Sacramento’s MSA has grown more quickly, as has Solano County’s MSA: 2.8 percent and 3.8 percent respectively.

Non-Farm Employment, Solano County, 2000-2014, December Data



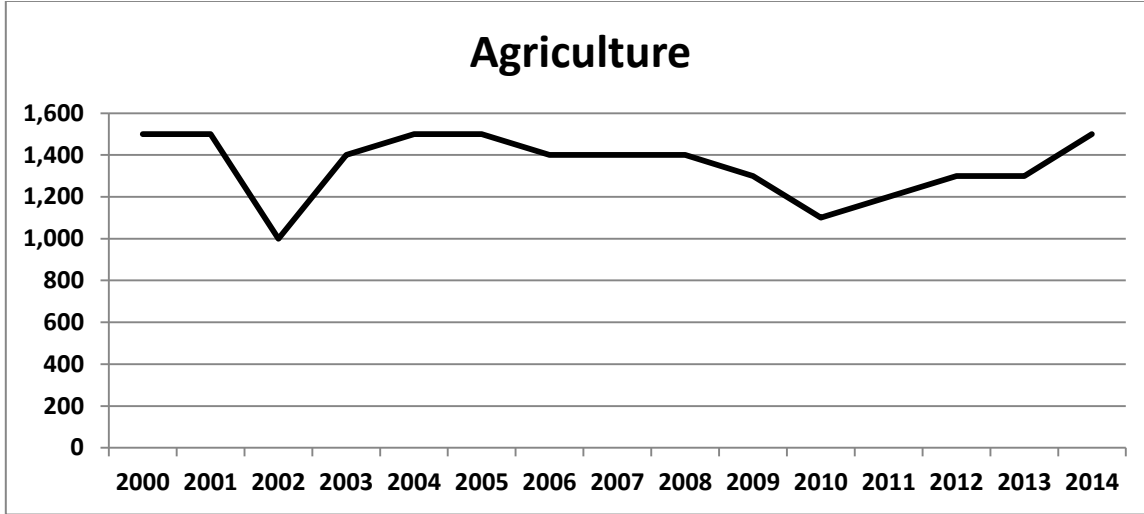
Source: California Employment Development Department (www.edd.ca.gov)

2014 was a year of jobs growth for Solano County in almost all industries. The next set of figures explores these data at the industry level, including local, state and federal government jobs.

TAKEAWAY: Non-Farm job growth in Solano County, since hitting the recession’s bottom in 2010, has been dominated by Health Care, Wholesale Trade, Education and Social Services, Leisure and Hospitality, and Other Services industries focused on county residents as a market.

WHAT IS IMPORTANT: Construction and Non-Durable Goods Manufacturing have started to show signs of life in terms of hiring more workers during 2014, expanding Solano County’s economic base.

Solano County Jobs by Industry, Percentage Change and Share of Total Jobs



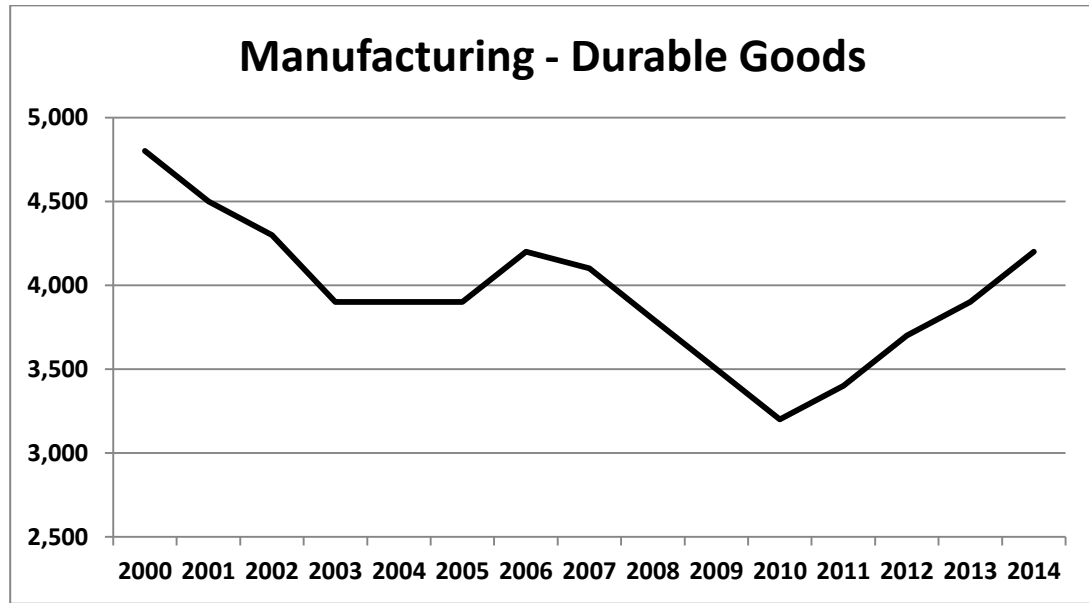
Source: California Employment Development Department (www.edd.ca.gov)

<i>Agriculture</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	100	400	200
Percent Change	7.1%	36.4%	15.4%
	<i>2007</i>	<i>2010</i>	<i>2014</i>
Share of Total	1.1%	0.9%	1.1%



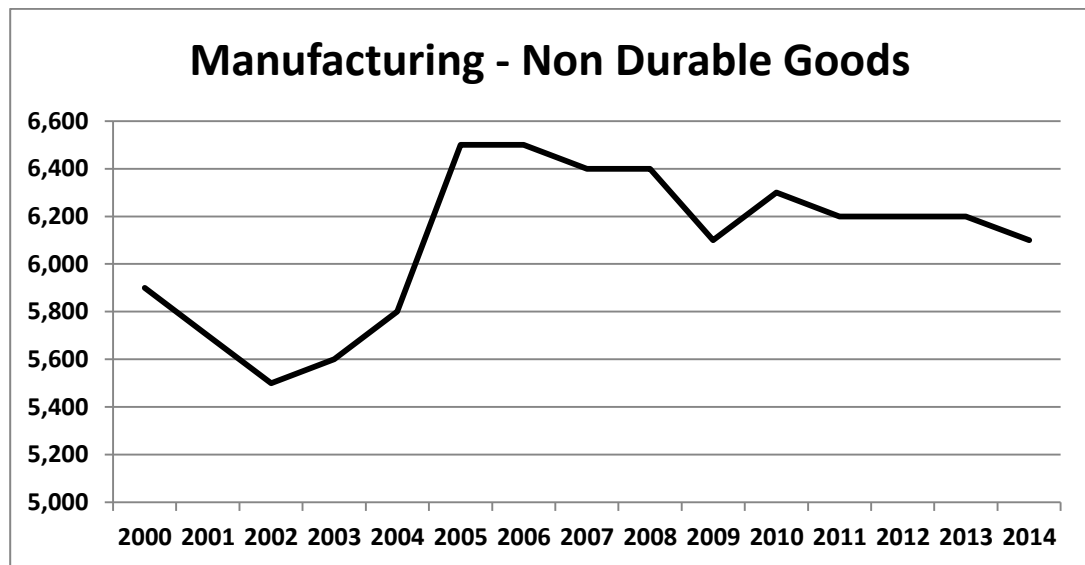
Source: California Employment Development Department (www.edd.ca.gov)

<i>Construction</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	(200)	1,800	500
Percent Change	-2.1%	24.3%	5.7%
	<i>2007</i>	<i>2010</i>	<i>2014</i>
Share of Total	7.1%	6.1%	7.0%



Source: California Employment Development Department (www.edd.ca.gov)

Durable Goods	2007-14	2010-14	2013-14
Change in Jobs	100	1,000	300
Percent Change	2.4%	31.3%	7.7%
	2007	2010	2014
Share of Total	3.1%	2.6%	3.2%



Source: California Employment Development Department (www.edd.ca.gov)

Non-Durable	2007-14	2010-14	2013-14
Change in Jobs	(300)	(200)	(100)
Percent Change	-4.7%	-3.2%	-1.6%
	2007	2010	2014
Share of Total	4.9%	5.2%	4.6%



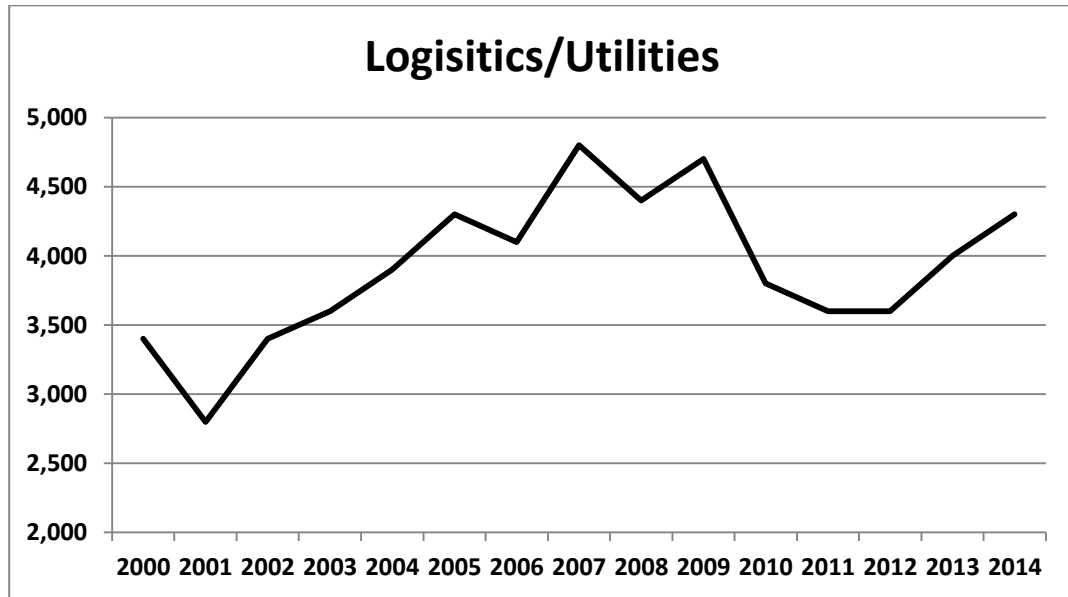
Source: California Employment Development Department (www.edd.ca.gov)

<i>Wholesale</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	300	500	100
Percent Change	7.3%	12.8%	2.3%
	2007	2010	2014
Share of Total	3.1%	3.2%	3.3%



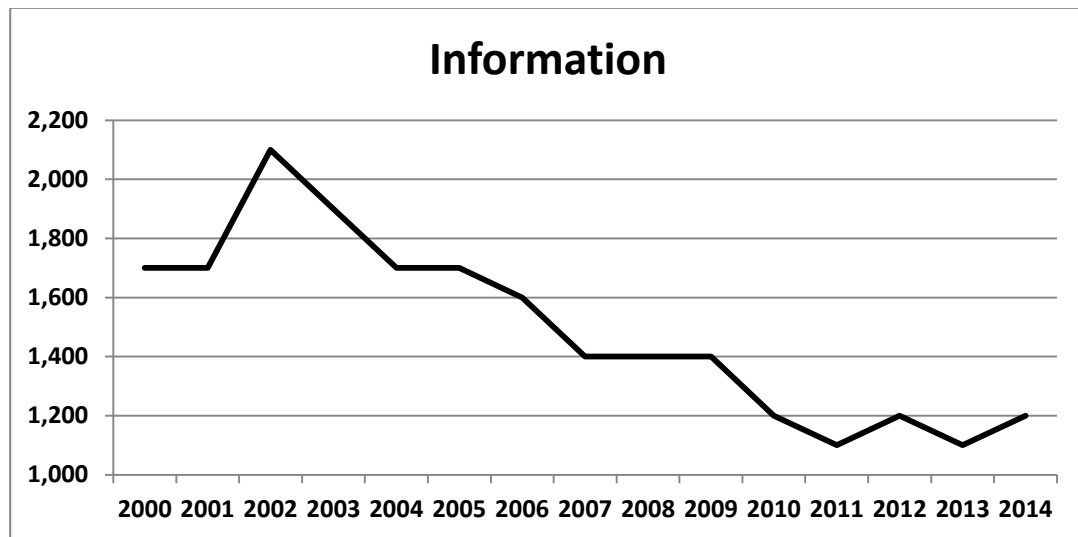
Source: California Employment Development Department (www.edd.ca.gov)

<i>Non-Durable</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	100	1,600	100
Percent Change	0.5%	9.0%	0.5%
	2007	2010	2014
Share of Total	14.1%	13.8%	13.8%



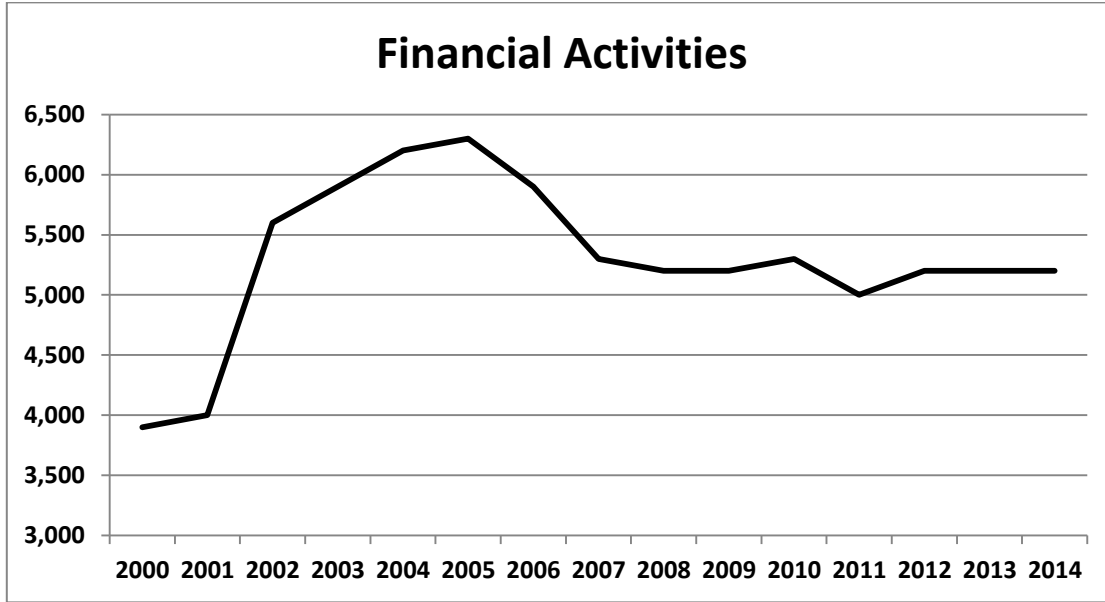
Source: California Employment Development Department (www.edd.ca.gov)

Logistics/Utilities	2007-14	2010-14	2013-14
Change in Jobs	(500)	500	300
Percent Change	-10.4%	13.2%	7.5%
	2007	2010	2014
Share of Total	3.6%	3.1%	3.3%



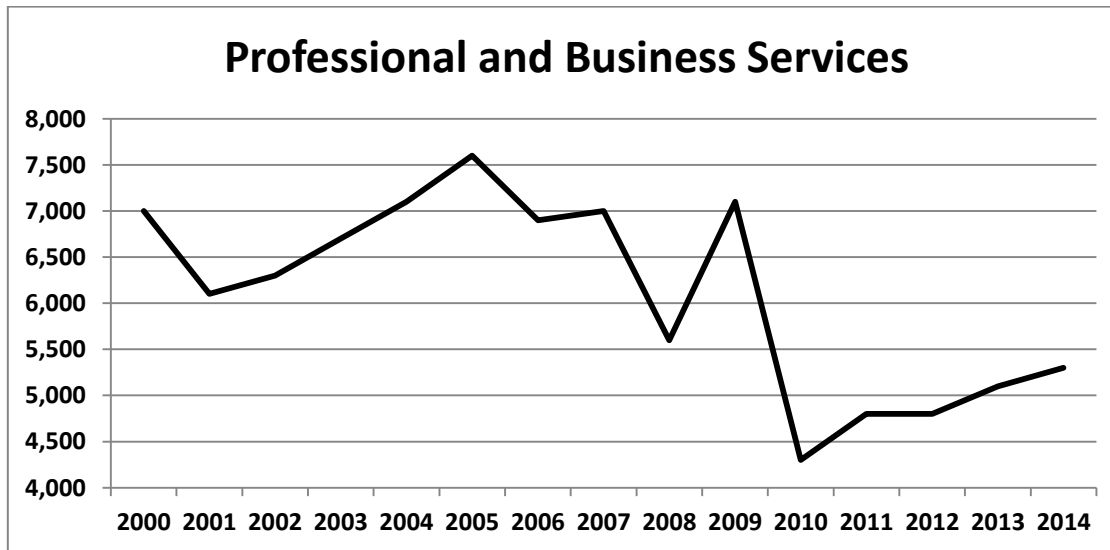
Source: California Employment Development Department (www.edd.ca.gov)

Information	2007-14	2010-14	2013-14
Change in Jobs	(200)	-	100
Percent Change	-14.3%	0.0%	9.1%
	2007	2010	2014
Share of Total	1.1%	1.0%	0.9%



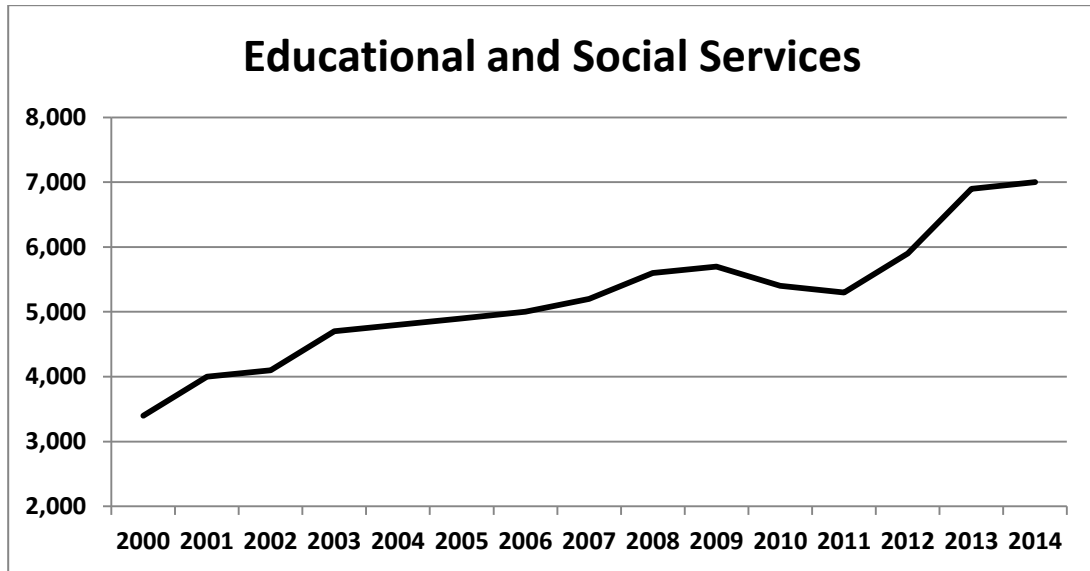
Source: California Employment Development Department (www.edd.ca.gov)

<i>Financial</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	(100)	(100)	-
Percent Change	-1.9%	-1.9%	0.0%
	<i>2007</i>	<i>2010</i>	<i>2014</i>
Share of Total	4.0%	4.4%	4.0%



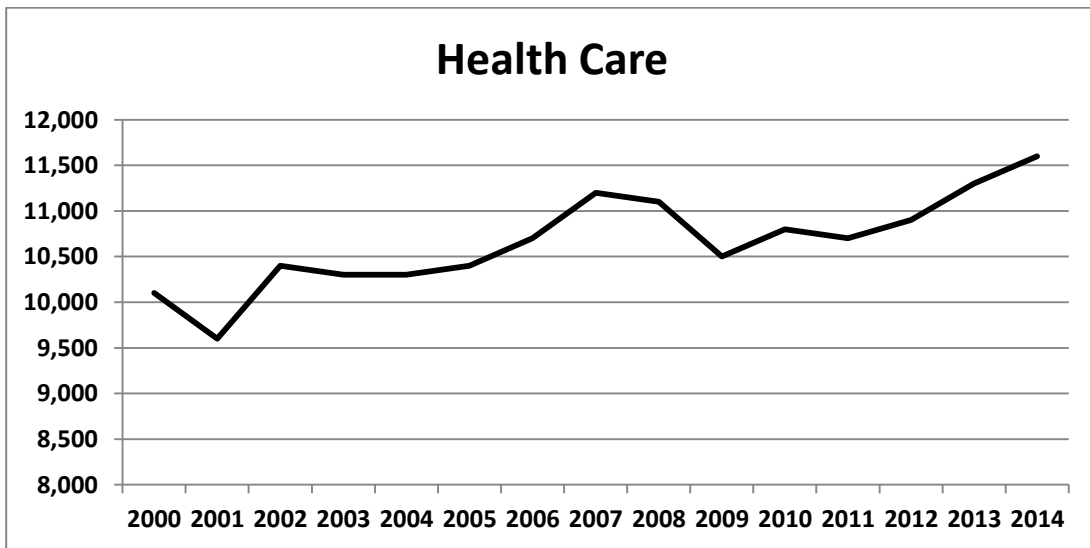
Source: California Employment Development Department (www.edd.ca.gov)

<i>Professional/ Business Services</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	(1,700)	1,000	200
Percent Change	-24.3%	23.3%	3.9%
	<i>2007</i>	<i>2010</i>	<i>2014</i>
Share of Total	5.3%	3.5%	4.0%



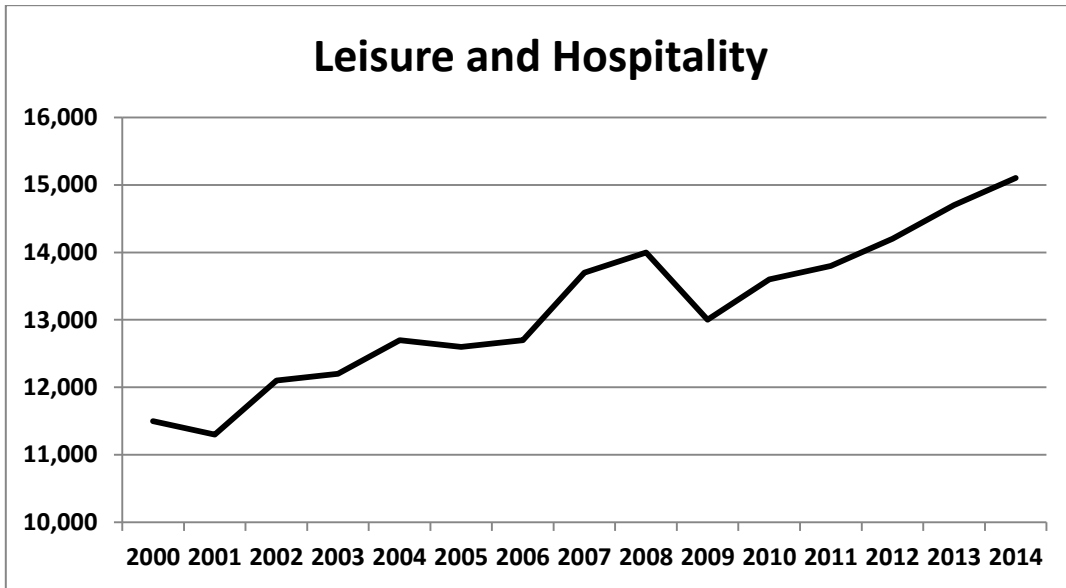
Source: California Employment Development Department (www.edd.ca.gov)

Educational and Social Services	2007-14	2010-14	2013-14
Change in Jobs	1,800	1,600	100
Percent Change	34.6%	29.6%	1.4%
	2007	2010	2014
Share of Total	3.9%	4.5%	5.3%



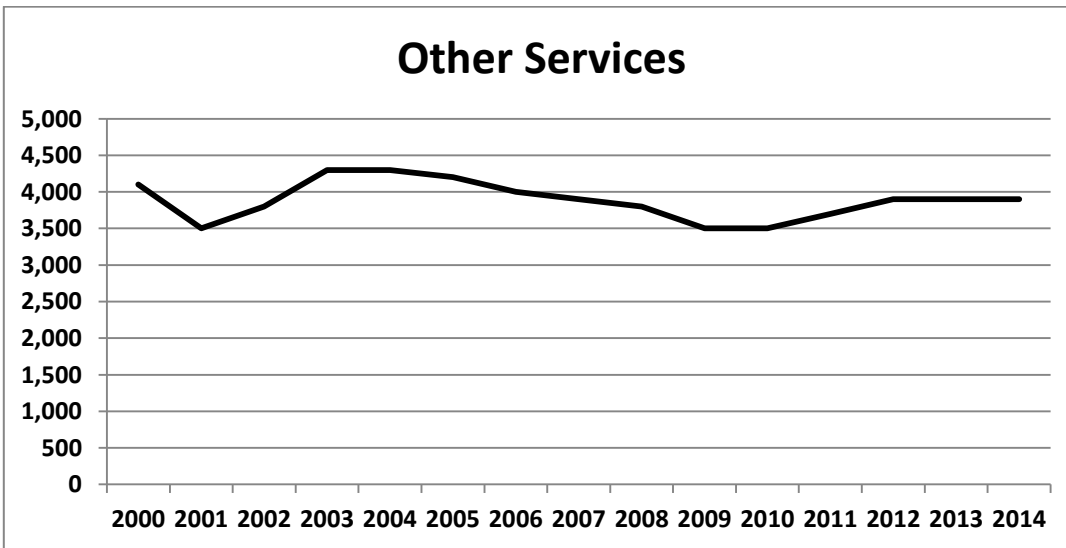
Source: California Employment Development Department (www.edd.ca.gov)

Health Care	2007-14	2010-14	2013-14
Change in Jobs	400	800	300
Percent Change	3.8%	7.9%	2.7%
	2007	2010	2014
Share of Total	8.5%	8.9%	8.8%



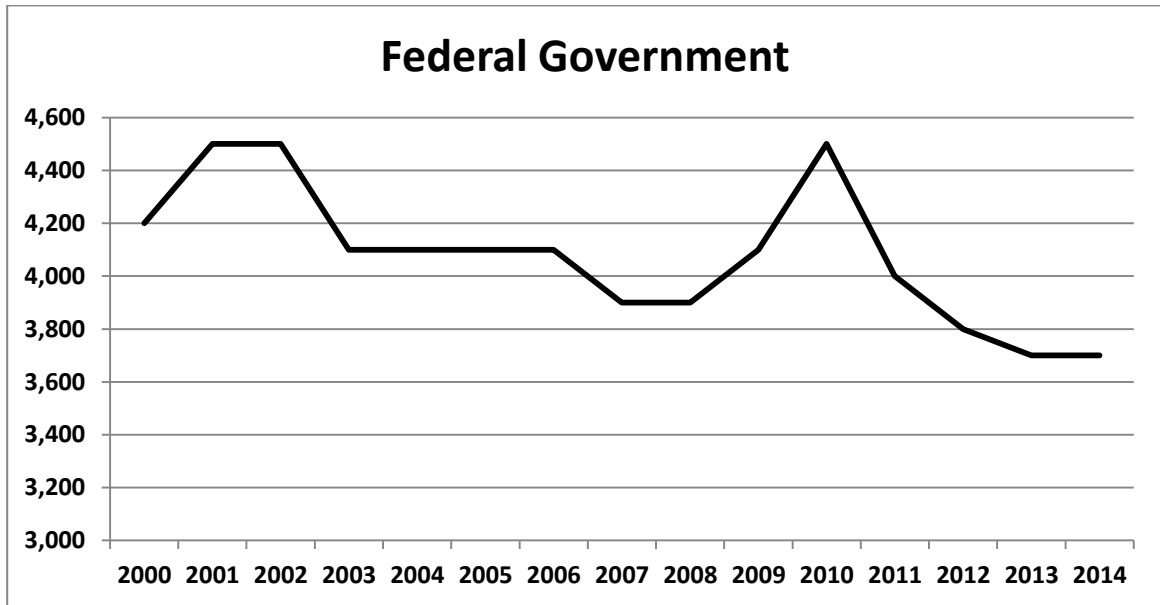
Source: California Employment Development Department (www.edd.ca.gov)

<i>Leisure and Hospitality</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	1,400	1,500	400
Percent Change	10.2%	11.0%	2.7%
	2007	2010	2014
Share of Total	10.4%	11.2%	11.5%



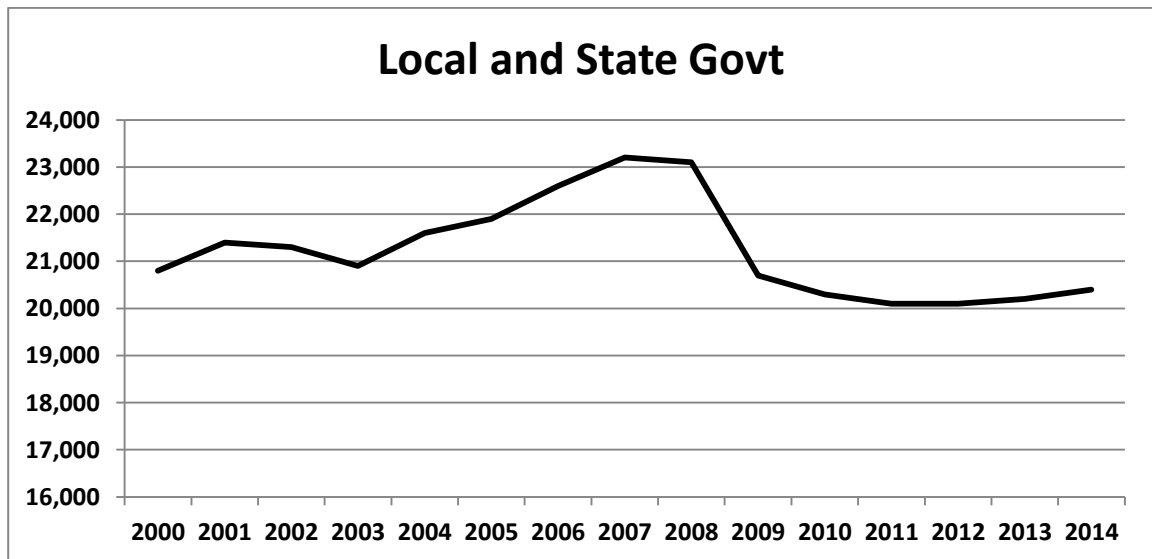
Source: California Employment Development Department (www.edd.ca.gov)

<i>Other Services</i>	<i>2007-14</i>	<i>2010-14</i>	<i>2013-14</i>
Change in Jobs	-	400	-
Percent Change	0.0%	11.4%	0.0%
	2007	2010	2014
Share of Total	3.0%	2.9%	3.0%



Source: California Employment Development Department (www.edd.ca.gov)

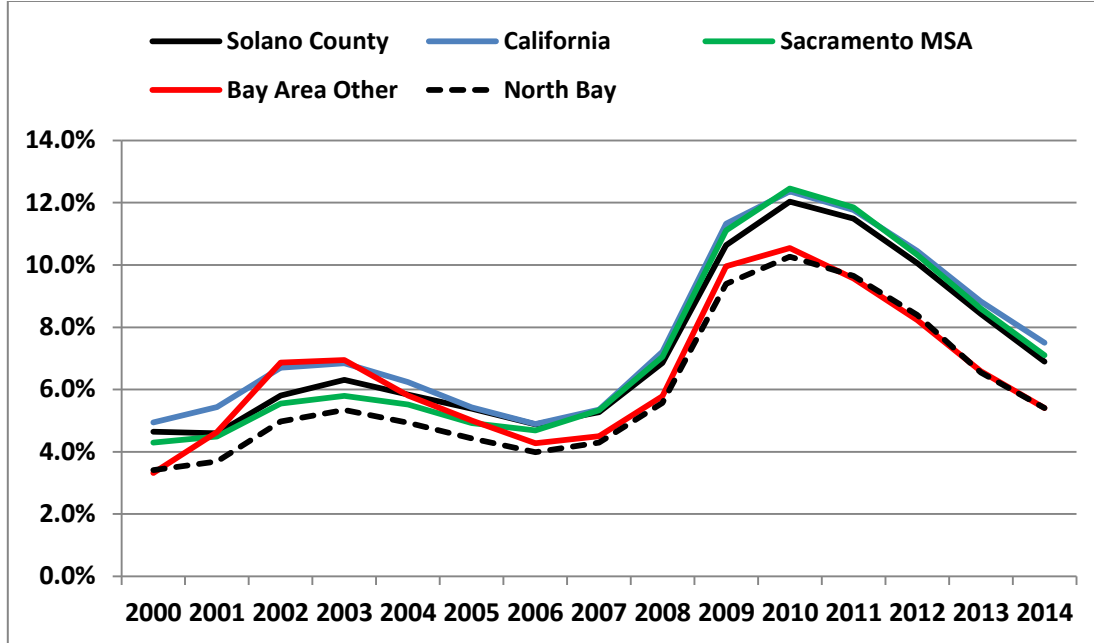
Federal Government	2007-14	2010-14	2013-14
Change in Jobs	(200)	(800)	-
Percent Change	-5.1%	-17.8%	0.0%
	2007	2010	2014
Share of Total	3.0%	3.7%	2.8%



Source: California Employment Development Department (www.edd.ca.gov)

Local/ State Government	2007-14	2010-14	2013-14
Change in Jobs	(2,800)	100	200
Percent Change	-12.1%	0.5%	1.0%
	2007	2010	2014
Share of Total	17.6%	16.7%	15.5%

Unemployment Rates: California, Solano County, Selected Areas, % of Labor Force



Source: California Employment Development Department (www.edd.ca.gov)

Solano County’s unemployment rate was 6.9 percent as of December 2014, and was 8.3 percent for December 2013. The lowest unemployment rate experienced by Solano County since 1990 was 4.0 percent in 2000. The current unemployment rate reflects both job growth and slower labor force growth. Solano County continues to generate jobs at a pace similar to the greater Sacramento area and the state of California overall in reducing unemployment rates, but not as fast as the Bay Area or the North Bay otherwise. Solano’s cities have seen unemployment fall across all areas, as shown later in this section.

Quick City-Level Data View, Unemployment Rates (%), December of Each Year

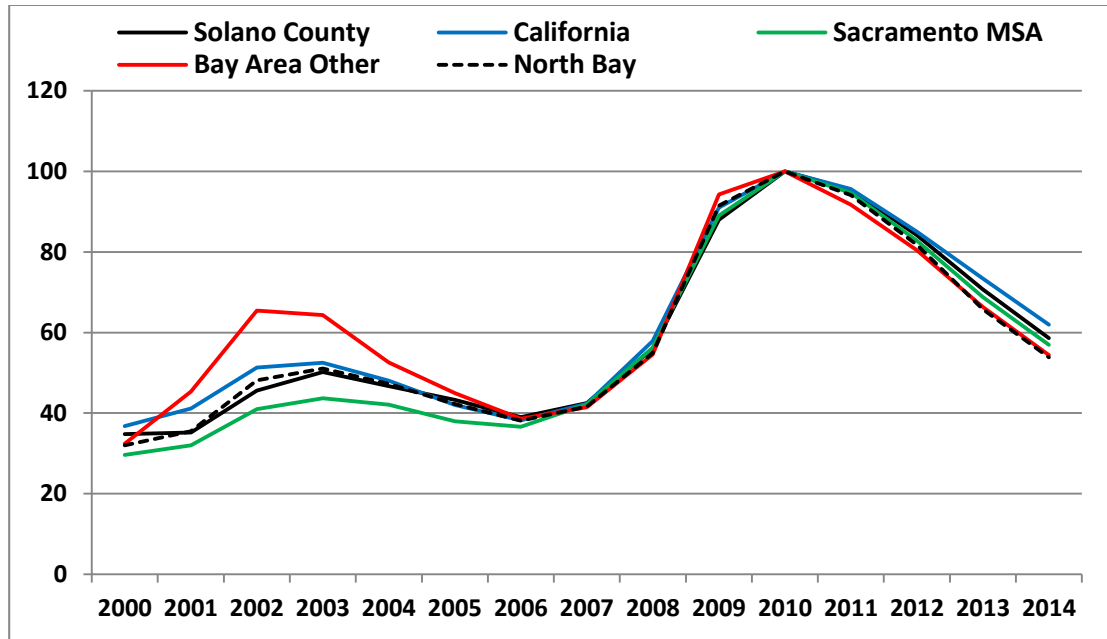
Place	2007	2010	2013	2014
Benicia	3.2	7.6	5.2	4.4
Dixon	4.2	9.7	6.7	5.7
Fairfield	5.8	13.2	9.2	7.8
Rio Vista	3.9	9.0	6.2	5.3
Suisun City	5.5	12.4	8.6	7.4
Vacaville	3.9	9.0	6.2	5.3
Vallejo	6.6	14.8	10.3	8.8
Solano County	5.3	12.0	8.3	6.9

Source: California Employment Development Department (www.edd.ca.gov)

TAKEAWAY: Solano County’s unemployment rate suggests local residents continue to be hired if they did not have a job previously, which generates more personal income and gross county product growth.

WHAT IS IMPORTANT: Solano County continues to keep pace with regional and state-level labor markets in terms of reducing the percentage of residents that are unemployed.

Total Unemployed Residents, Index 2010 = 100, Selected Areas



Source: California Employment Development Department (www.edd.ca.gov)

Percent Change in Unemployed Residents, 2014 Compared to Year in Table

<i>Unemployed Residents</i>	<i>2007</i>	<i>2010</i>	<i>2013</i>
Solano County	38.0%	-41.4%	-17.0%
California	46.4%	-38.0%	-15.5%
Sacramento MSA	35.1%	-43.1%	-17.2%
Bay Area Other	31.3%	-45.6%	-18.0%
North Bay (Napa/Sonoma counties)	29.3%	-46.1%	-18.1%

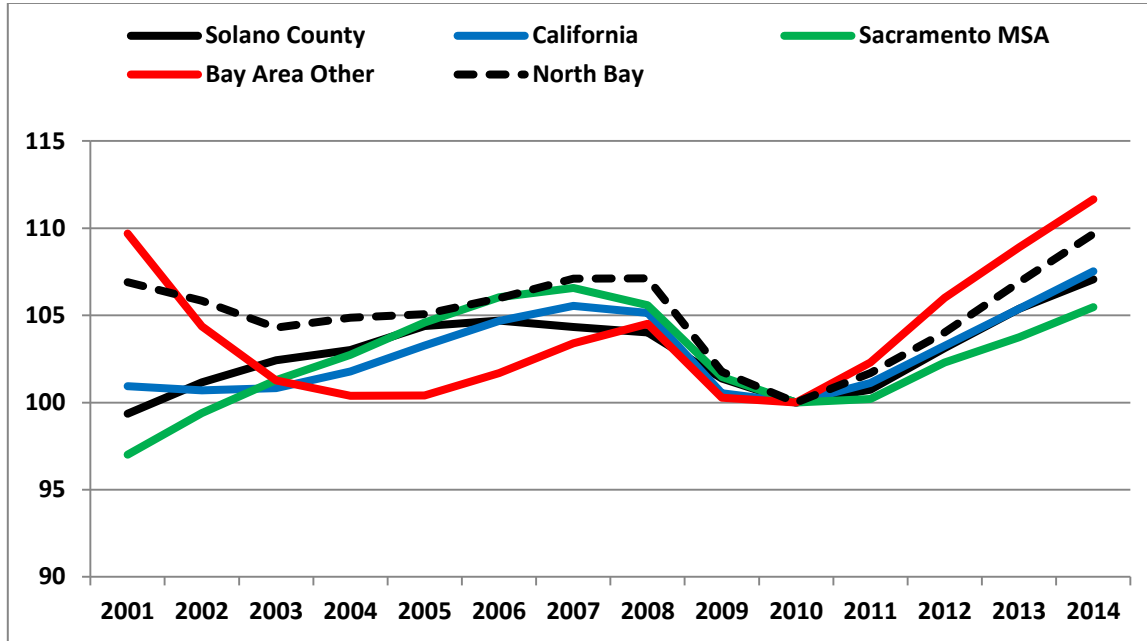
Source: California Employment Development Department (www.edd.ca.gov)

Notice that the movements of the selected areas are close together, and the pace at which the state of California is employing its residents has slowed a bit. As compared to 2014 data, the number of unemployed residents is 40.3% percent lower than in 2010 for Solano County, 34.7 percent for the other Bay Area areas, 35.6 percent for Sonoma and Napa counties combined, and 42.0 percent in Sacramento’s metro area. As compared to December 2007, the number of unemployed residents in December 2014 is 38 percent larger; these data signal that there are still many residents of Solano County available for work.

TAKEAWAY: Solano County residents continue to find jobs throughout the Bay Area and the Sacramento Valley. The more Solano County residents are working, the more the county’s economy grows, and also the more commuting that takes place on county roads and I-80.

WHAT IS IMPORTANT: The economy is creating jobs, though not as quickly as the North Bay or the Bay Area otherwise.

Total Employed Residents, Index 2010 = 100



Source: California Employment Development Department (www.edd.ca.gov)

The Bay Area outside of Solano County and the North Bay counties of Sonoma and Napa saw faster growth of employed residents than Solano County in 2014; 2014 was a slower growth year than 2013 for Solano County, but still a positive year of growth. In 2014, the number of employed residents grew by 1.6 percent since 2013; California overall grew its employed residents by 2.0 percent in 2014, and the North Bay (Sonoma and Napa) counties grew a combined 2.6 percent. Since 2010, an additional 7.1 percent of Solano County residents are working, almost on pace with California overall and more than Sacramento’s MSA. The Bay Area has 11.7 percent more residents working, Sonoma and Napa counties have 9.7 percent more residents working since 2010. In terms of people, 3,800 Solano County residents found work in 2014 who were not working in 2013.

Percent Change in Employed Residents, 2014 Compared to Year in Table¹

Employed Residents	2007	2010	2013
Solano County	2.6%	7.1%	1.6%
California	1.9%	7.5%	2.0%
Sacramento MSA	-1.0%	5.5%	1.6%
Rest of Bay Area	8.0%	11.7%	2.5%
North Bay (Napa/Sonoma counties)	2.4%	9.7%	2.6%

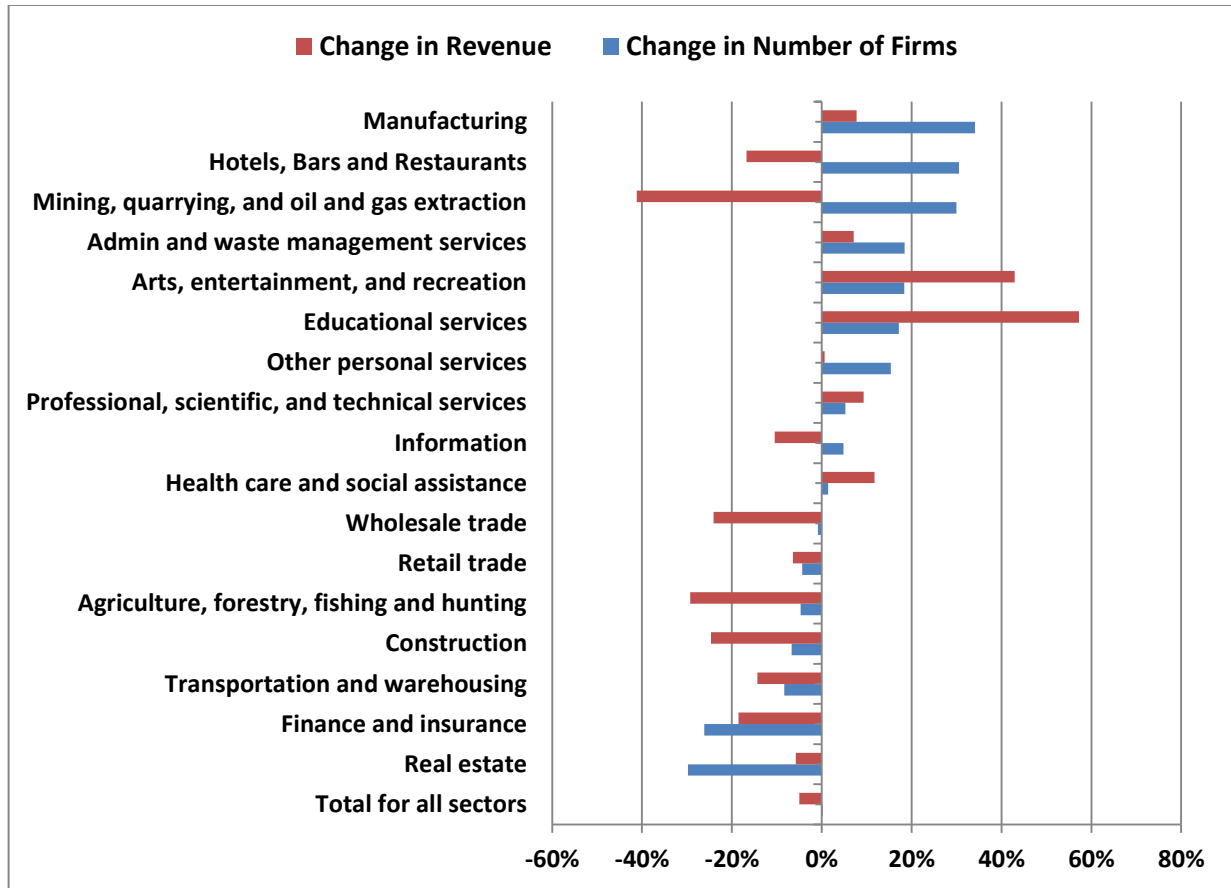
Source: California EDD (www.edd.ca.gov)

TAKEAWAY: More Solano County residents found jobs in 2014 than in 2013, but the percentage change was slower.

WHAT IS IMPORTANT: Regional growth, especially in the Bay Area’s urban counties, provides a broader job market for Solano County’ residents than Solano County employers alone.

¹ For example, the 2013 level of Solano County’s employed residents is 1.6 percent higher than the 2005 level.

Non-employers, 2007 to 2012



Source: Census Bureau: www.census.gov

Non-employer businesses are those that are mainly self-employment businesses, have a minimal number of workers, may be contract-worker businesses (1099 contract workers, for example), but are viable businesses due to generating revenues. The Census Bureau tracks these non-payroll businesses by their tax filings; hence there is a lag in the data. The latest data for Solano County is 2012, and the chart here compares 2012 to 2007 in terms of the growth in both revenues and number of firms by industry. The chart shows the mixed results of the economic recovery across these smaller businesses. Notice that recreation and the arts, administrative and waste management services, education and health services, and manufacturing all show both positive growth and recovery to 2012. The housing recession lingers a bit in terms of self-employed construction workers, finance, and real estate businesses. The next table shows how these non-employers industries have changed from 2010 to 2012, almost all of them growing in both number of firms and revenues.

TAKEAWAY: While some industries continue to have fewer self-employed business since before the recession, many industries are experiencing growth of new businesses, revenues, or both since 2010.

WHAT IS IMPORTANT: Growth of smaller businesses reflects market opportunities in local areas and also show local residents are taking opportunities to start their own businesses.

Non-employers (cont.)

Change in Number of Non-employers and Their Revenue 2010 to 2012, % Change

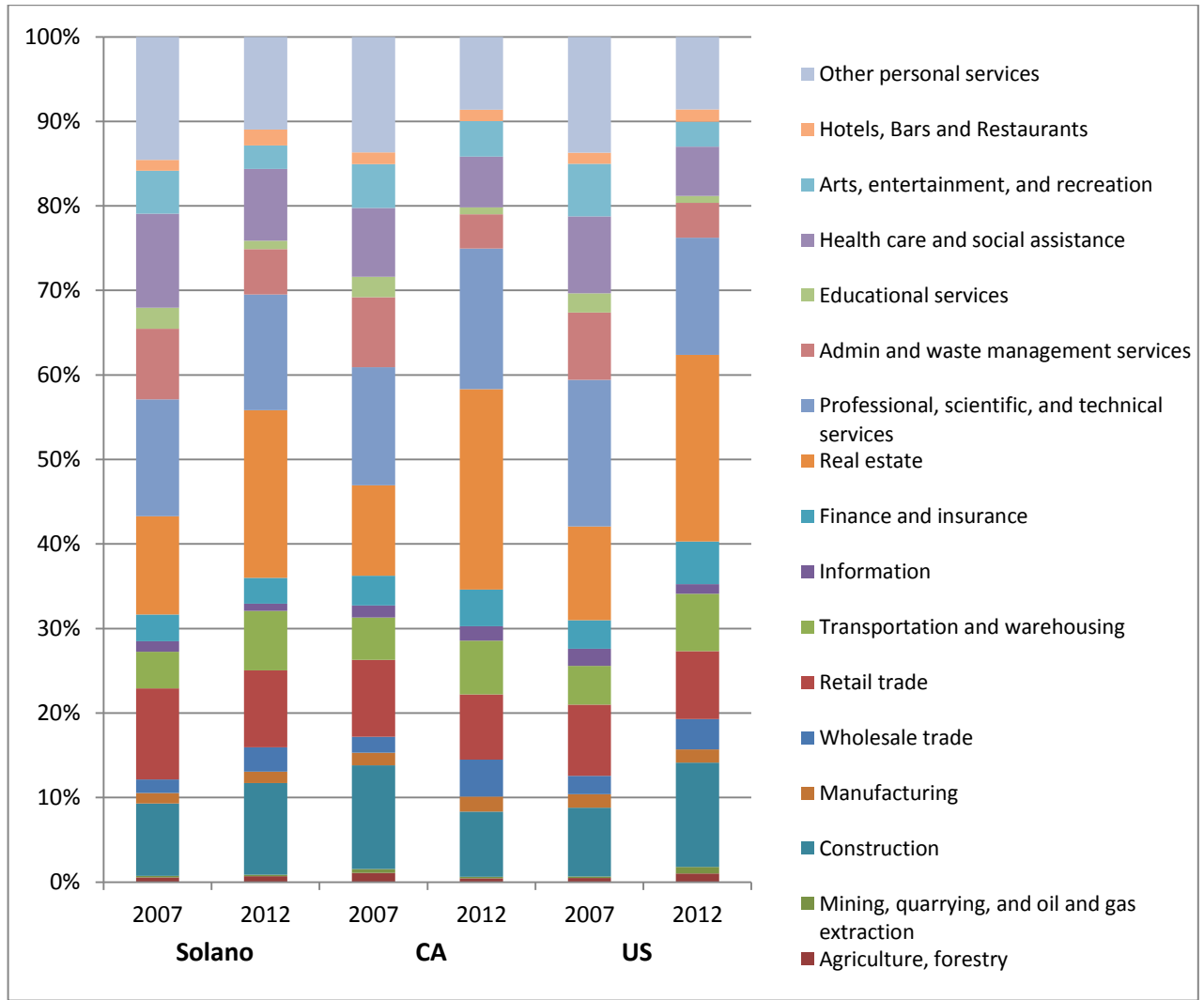
<i>Industry</i>	<i>% Chg Firms</i>	<i>% Chg Rev</i>
Mining, quarrying, and oil and gas extraction	8.3%	41.6%
Manufacturing	14.8%	34.5%
Agriculture, forestry, fishing and hunting	6.3%	32.0%
Arts, entertainment, and recreation	9.4%	30.4%
Educational services	15.6%	16.9%
Transportation and warehousing	-0.8%	14.1%
Health care and social assistance	-4.7%	9.0%
Other personal services	6.6%	8.8%
Real estate	-1.3%	8.5%
Hotels, Bars and Restaurants	5.2%	8.3%
Construction	-0.3%	8.0%
Admin and waste management services	3.6%	7.5%
Professional, scientific, and technical services	4.0%	4.9%
Retail trade	3.1%	4.9%
Information	5.2%	-2.1%
Wholesale trade	10.7%	-8.3%
Finance and insurance	3.2%	-65.8%

Source: Census Bureau: www.census.gov

Notice that finance and insurance has been shrinking, while manufacturing saw some strength in 2012 compared to the recession’s trough. Almost of these industries are now growing, which follows Solano County’s recovery overall. This trend is likely to continue in 2013 and 2014 as the data are released, following other data in this Index as Solano County’s economy is expanding.

In comparing Solano County’s mix of non-employers to California and the United States overall in 2012, Solano County remains above California in terms of “goods-producing” industries versus services industries; the United States has more goods producers as a percentage of overall, smaller businesses than Solano. Growth of non-employer, construction businesses in California is outpacing both Solano County and the United States. For non-employers, Solano County has 13.1 percent of these micro-businesses producing goods and approximately 86.9% producing services. These proportions are more toward goods-producing than in 2007.

Percentage of Non-Employers (Solano County, United States, California), 2007 and 2012

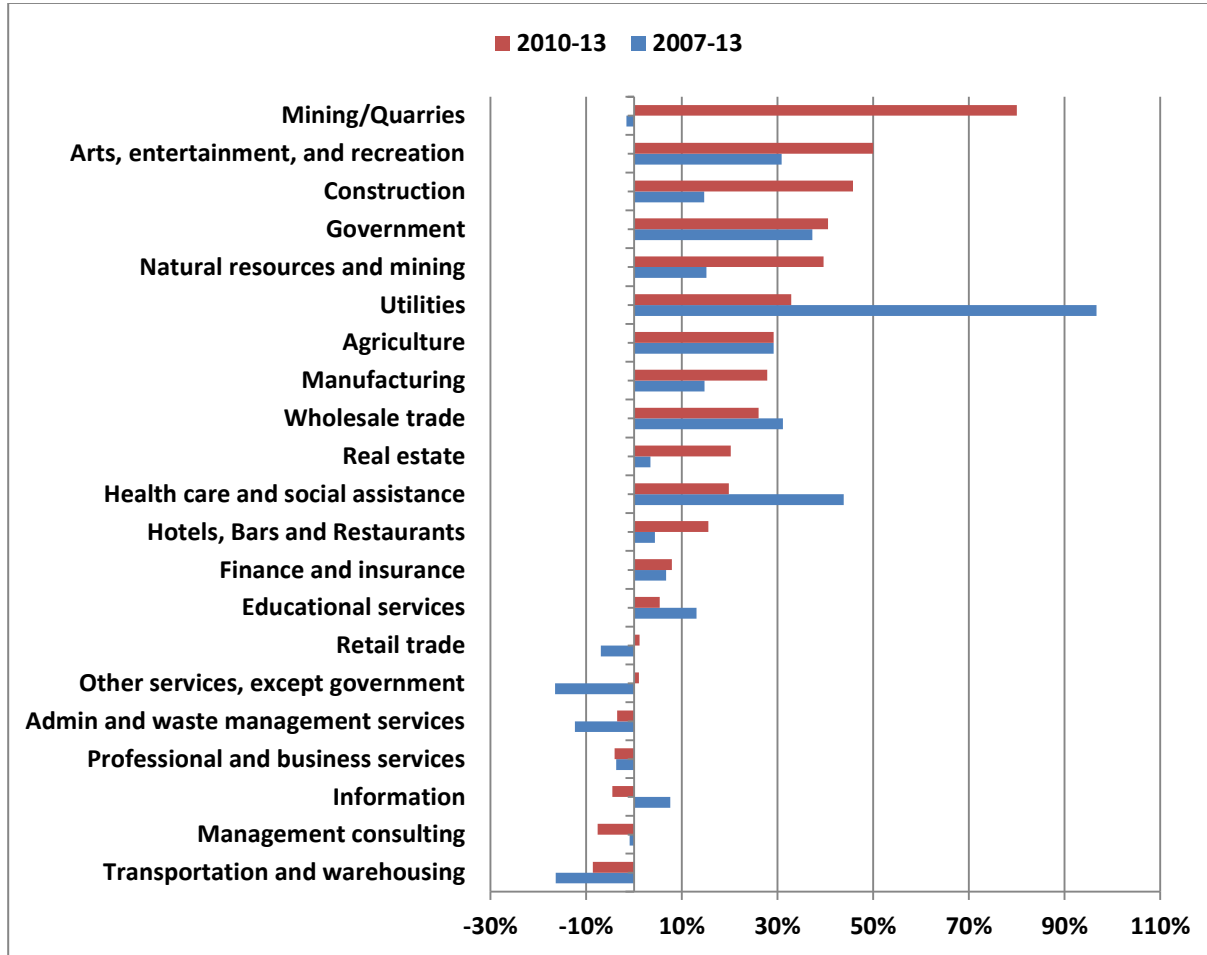


Source: Census Bureau: www.census.gov

TAKEAWAY: Solano County has a larger proportion of services-providing non-employers than the state of California, but less than the United States overall.

WHAT IS IMPORTANT: Professional services, real estate services, and a mix of “other services” are the typical types of service-providing non-employers, where construction and contractors are the main goods-producers for non-employers in Solano County, California and the nation overall.

GDP % change by sector, Solano County: 2007 and 2010 compared to 2013, 2010 Dollars



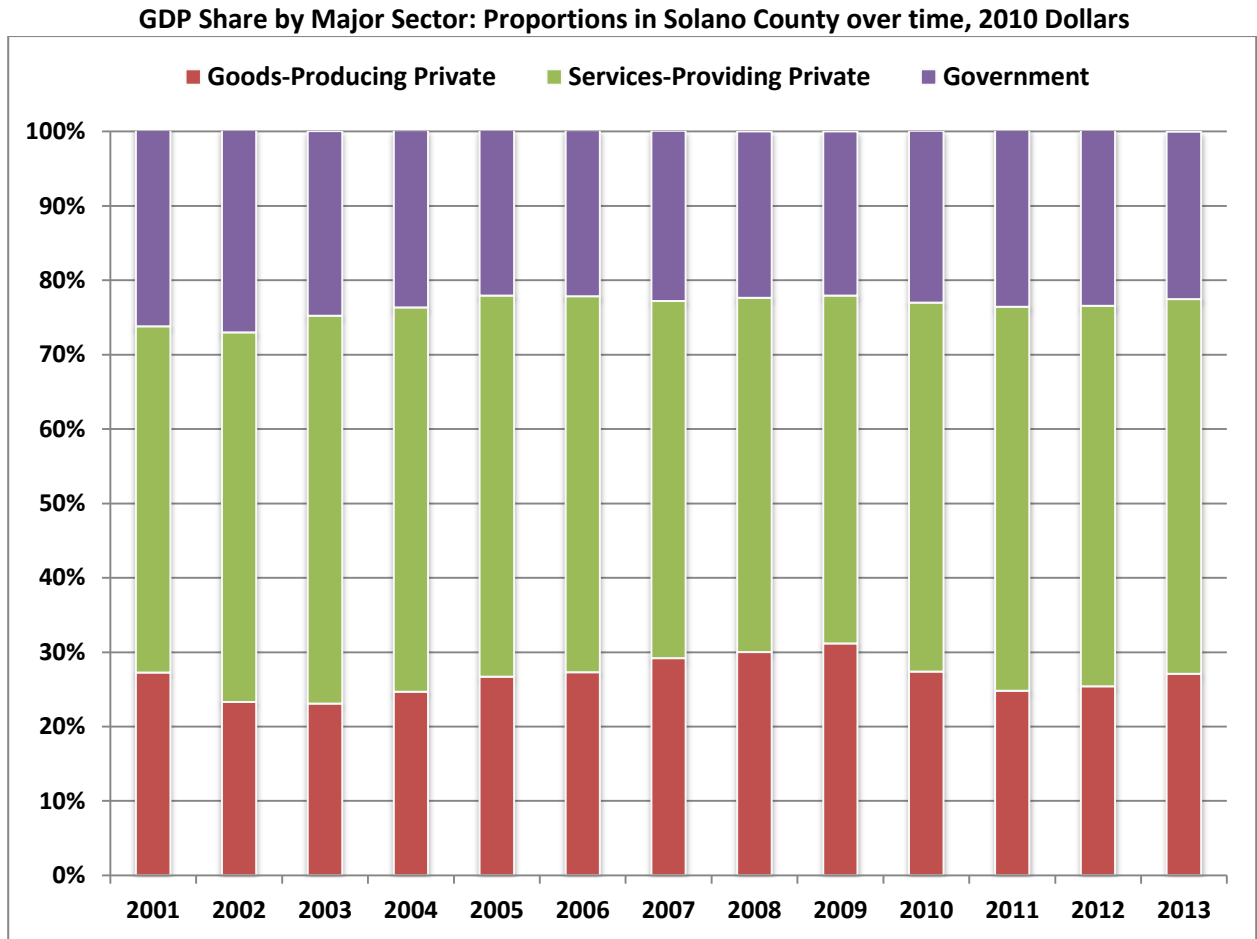
Source: Bureau of Economic Analysis (www.bea.gov)

Using 2007 and 2010 as comparison dates, Gross County Product (GCP) data show that Solano County is very close to pre-recession levels in terms of producing goods and services. These data are sorted by the industries with the largest gains since 2010; these are encouraging data in terms of the number of industry sectors that are growing. Goods-producing industries are outpacing services as a group in terms of percentage growth since 2007 and 2010. Finance and Insurance businesses continue to grow slowly, but positively. Health care and social assistance (which tends to be primarily health and human services focused) also continues to grow in the 2013 data; health care has been the major growth sector since 2007 for Solano County. Industries still below their pre-recession levels have climbed closer to 2007 levels.

TAKEAWAY: Gross county product levels have risen each year since 2010, and the broadening of industries that are growing in Solano County points to economic expansion versus simply recovering.

WHAT IS IMPORTANT: The industries that are still behind pre-recession revenue levels are likely to continue their growth in 2014 and 2015 based on general economic growth throughout the region.

GDP by Sector (cont.)



Source: Bureau of Economic Analysis (www.bea.gov)

The shares of GCP in Solano County changed little since 2012, among goods-producing, service-producing and government services production; there has been a slight shift away from government toward goods-producing industries. Some changes have taken place and has also moved toward goods-producing industries. In 2013, Solano’s GDP showed some reduction in the proportion of government resources in Solano County. **With a growing economy and reduced government resources, the private sector is becoming more of an engine for growth in Solano County.**

Shares of GDP, Solano County, 2007, 2010, 2012, 2013 Dollars

Industry	2007	2010	2012	2013
Agriculture (Farm)/Forestry	0.9%	0.9%	0.9%	1.2%
Non-Farm Private	77.2%	76.9%	76.3%	77.5%
Utilities	1.3%	1.9%	1.9%	2.0%
Construction	6.9%	5.3%	6.3%	6.1%
Durable goods manufacturing	3.1%	2.7%	3.0%	3.3%
Nondurable goods manufacturing	17.9%	18.3%	15.1%	16.3%
Wholesale trade	4.2%	4.4%	4.6%	4.6%
Retail trade	7.7%	7.1%	7.2%	7.1%
Transportation and warehousing	2.1%	2.1%	2.2%	1.7%
Information	1.3%	1.5%	1.4%	1.5%
Finance and insurance	2.6%	2.9%	3.3%	3.3%
Real estate and rental and leasing	8.2%	7.8%	8.2%	8.2%
Professional services	6.0%	6.2%	5.6%	5.4%
Management consulting	0.9%	1.0%	0.8%	0.7%
Admin and waste manage services	2.8%	2.6%	2.3%	2.2%
Educational services	0.6%	0.6%	0.6%	0.5%
Health care and social assistance	8.3%	10.0%	10.9%	11.0%
Arts, entertainment, and recreation	0.7%	0.6%	0.8%	0.8%
Hotels/Bars/Restaurants	2.4%	2.2%	2.3%	2.3%
Other Services	2.7%	2.2%	2.3%	2.1%
Government	22.9%	23.1%	23.7%	22.5%

Manufacturing productivity continued to grow in Solano County in 2013 as proportion of the overall economy and continues to grow. It is important to recognize that real GDP in 2013 is 97 percent of 2007 real GDP; growth in 2013 continues to bring Solano County back toward pre-recession levels overall.

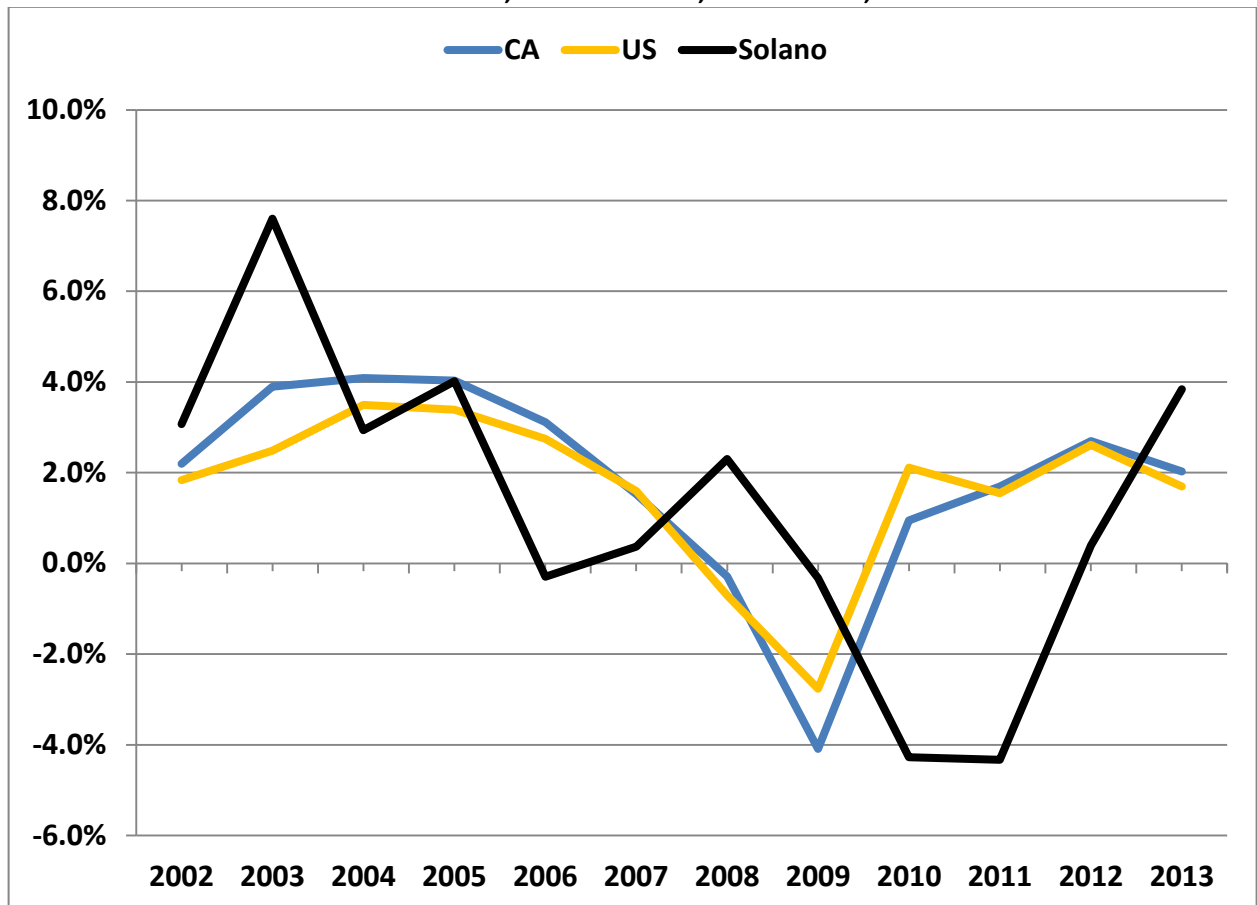
TAKEAWAY: Manufacturing, wholesale, and professional services grew their share of Solano County's economy in 2013. These are signs of rising "export" income for Solano County, income derived from customers outside the county lines, as 2014 ends and 2015 begins.

WHAT IS IMPORTANT: As goods-producing businesses grow in their proportion of the local economy, income growth is accelerated if these businesses are focused on export versus local markets for their goods due to these business' larger, multiplier effects.

GDP Growth Comparison, 2002-2013 Solano County, California and the United States overall

This figure compares the growth rate of gross domestic product (GDP) to the equivalents in Solano County and California; Solano County's gross county product had a strong year in 2013. The data above suggest that Solano County's 2013 economic growth rate (3.8 percent) outpaced the state and nation in 2013 by almost double California's growth rate (2.0 percent) growth rate and more than double the national growth rate (1.7 percent). That is specific to 2013. Previously, in 2010 dollars, Solano County growth was negative from 2009 to 2011, shot up quickly in 2012 and continues to grow in 2013. Based on US growth rates and the state of California growing slightly faster than the nation, 2014 should be another year of growth for Solano County's productivity and income.

GDP Growth Rates, Selected Areas, 2010 Dollars, 2002-2013



Source: Bureau of Economic Analysis (www.bea.gov)

TAKEAWAY: Solano County continued its GDP growth in 2013, and grew by almost double the rate of the state and over two times the growth rate of the national economy.

WHAT IS IMPORTANT: Based on the 2014 data in this report otherwise, especially the employment figures we saw above, 2014 should be another strong year of income and productivity growth for Solano County once the 2014 data are published in 2015.

Personal Income

**Per Capita Personal Income Changes: Solano County, California, and United States
2002-2013, 2010 Dollars**



Source: Bureau of Economic Analysis (www.bea.gov)

Percent Change in Personal Income Per Capita to 2013, 2010 Dollars

Comp to 2013	Solano County	CA	US
2007	-8.1%	0.2%	-0.9%
2010	4.9%	7.1%	3.7%
2012	1.8%	0.5%	-0.4%

Source: Bureau of Economic Analysis (www.bea.gov)

Personal income is the source of household purchases of goods and services. From an income standpoint, personal income is made up of wages and salaries, transfer payments from all levels of government, investment income (dividends, interest, and rents), business income from owning a business (proprietor’s income) and other income sources. This figure shows the reduction in the amount of transfer payments to Solano County residents as part of their income. When the recession was having its largest effects (specifically between 2008 and 2010), this figure shows that personal income was falling and the amount of personal income from government transfer payments was growing. These are classic signs of recession activity; transfer payments (the gap between these two series) are shrinking again, which is a good sign.

TAKEAWAY: Personal income less transfer payments from governments rose at about the same pace in 2012 and 2013.

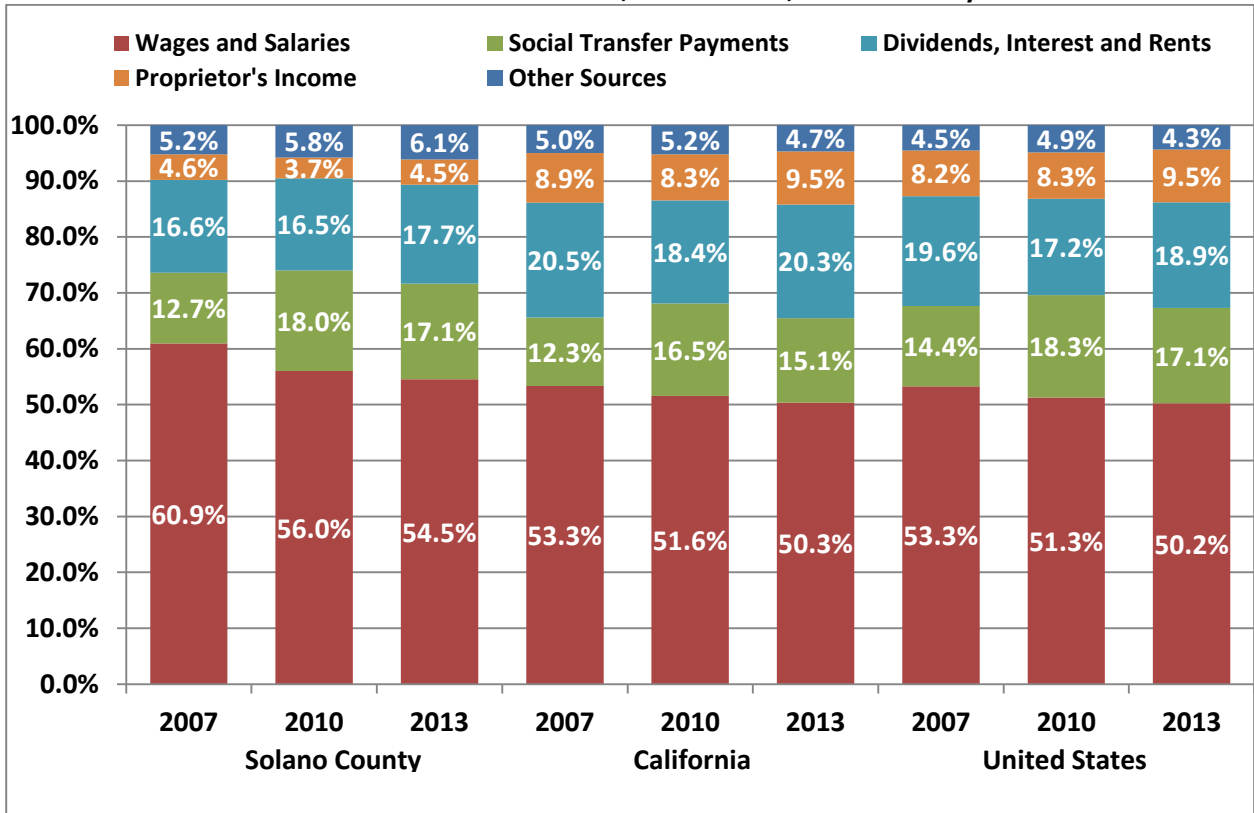
WHAT IS IMPORTANT: As the proportion of personal income that comes from government transfers falls, there are normally more incomes generated from jobs and investments, which the data in this report corroborate is happening in Solano County.

Comparison of Percentage Change in Sources of Personal Income compared to 2013
2010 Dollars, Selected Areas

Percentage Change to 2013	Solano County			California			United States		
	2007	2010	2012	2007	2010	2012	2007	2010	2012
Personal Income	0.6%	6.3%	2.6%	13.0%	12.0%	5.0%	2.6%	4.5%	1.4%
Wages and Salaries	-7.8%	6.0%	3.9%	7.8%	10.5%	3.9%	-3.0%	2.7%	1.1%
Social Transfer Payments	33.0%	-0.9%	3.2%	40.4%	3.3%	4.3%	22.7%	-2.0%	0.7%
Dividends, Interest and Rents	4.9%	11.4%	2.3%	7.0%	18.1%	9.7%	-4.9%	10.4%	5.3%
Proprietor's Income	-16.0%	10.6%	1.5%	8.8%	15.4%	16.8%	11.8%	12.0%	7.6%
Other Sources	22.4%	13.3%	-9.2%	33.6%	27.1%	-16.1%	21.4%	14.6%	-17.5%

Source: Bureau of Economic Analysis (www.bea.gov)

Sources of Personal Income, 2010 Dollars, Solano County



Source: Bureau of Economic Analysis (www.bea.gov)

Wages and salaries are the dominant way households generate personal income. Transfer payments fell in 2013 as a percentage of overall personal income in Solano County, which is also true for the state of California and the nation overall due to economic growth. Investment income increased, due to both a growing stock market and housing market in value in 2013.

TAKEAWAY: Over 89 percent of personal income in Solano County comes from wages, salaries, investment income, and government transfers, but Solano County residents derive less of their personal incomes from financial investments than the nation or state on average.

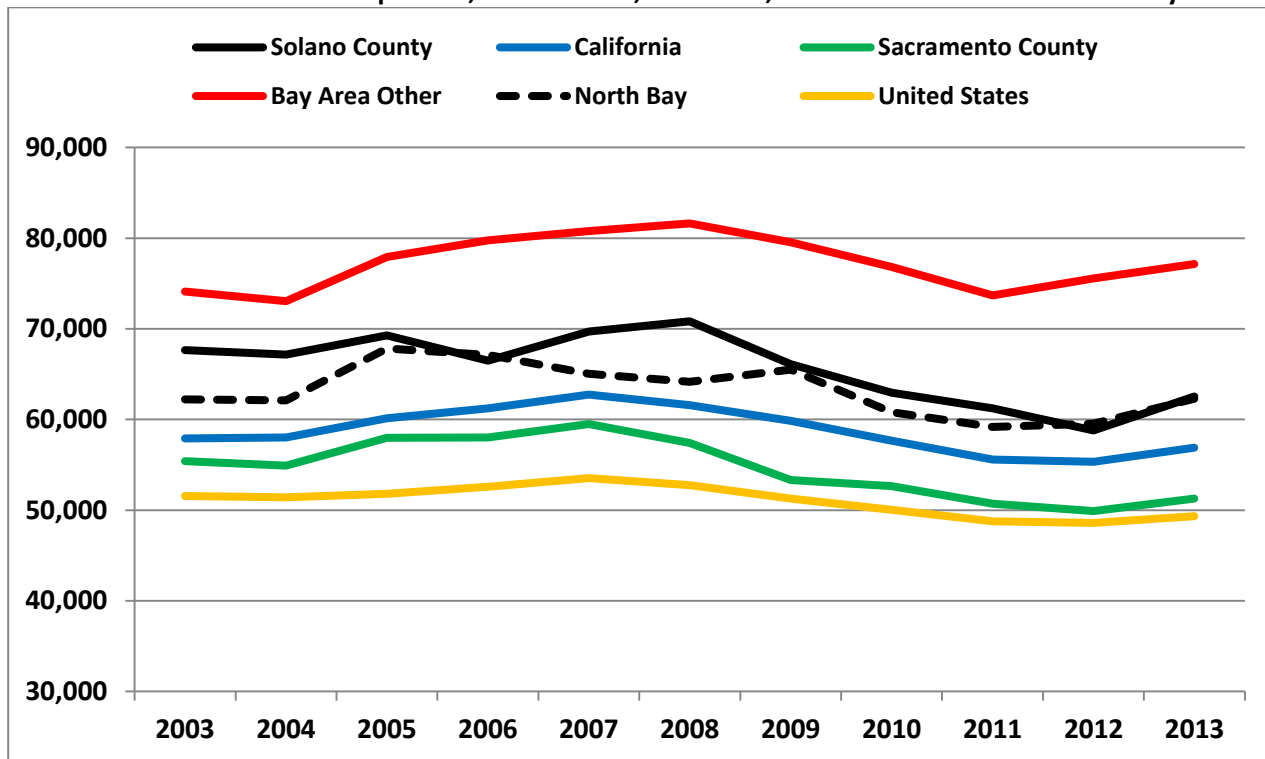
WHAT IS IMPORTANT: As investment and wage/salary income grows versus social transfer payments, the local economy accelerates its growth.

Median Household Income

Median household income is an important data point for two reasons. First, it is a gauge of how well the typical household is doing in terms of income to support a home. Personal income per capita provides one way to see such data; median household income is sometimes preferred as a measure because the personal income per person can be skewed by large personal incomes quickly upward. Second, median income measures are used to determine fair housing rents and other, federal housing subsidies.

For Solano County, real median household income increased a bit in 2013 and followed other, selected areas as shown in the figure below. Solano’s median income grew more quickly than any of these areas, and remains similar to the North Bay (Sonoma and Napa counties). California’s median income grew at a slower pace, but still experienced positive growth. As personal income has grown more quickly, median household income is now also rising. In real terms, Solano County median household income is \$62,541 in 2013.

Median Household Comparison, 2010 Dollars, California, United States and Solano County



Sources: Census Bureau (Median Household Income), California Department of Finance (CPI data)

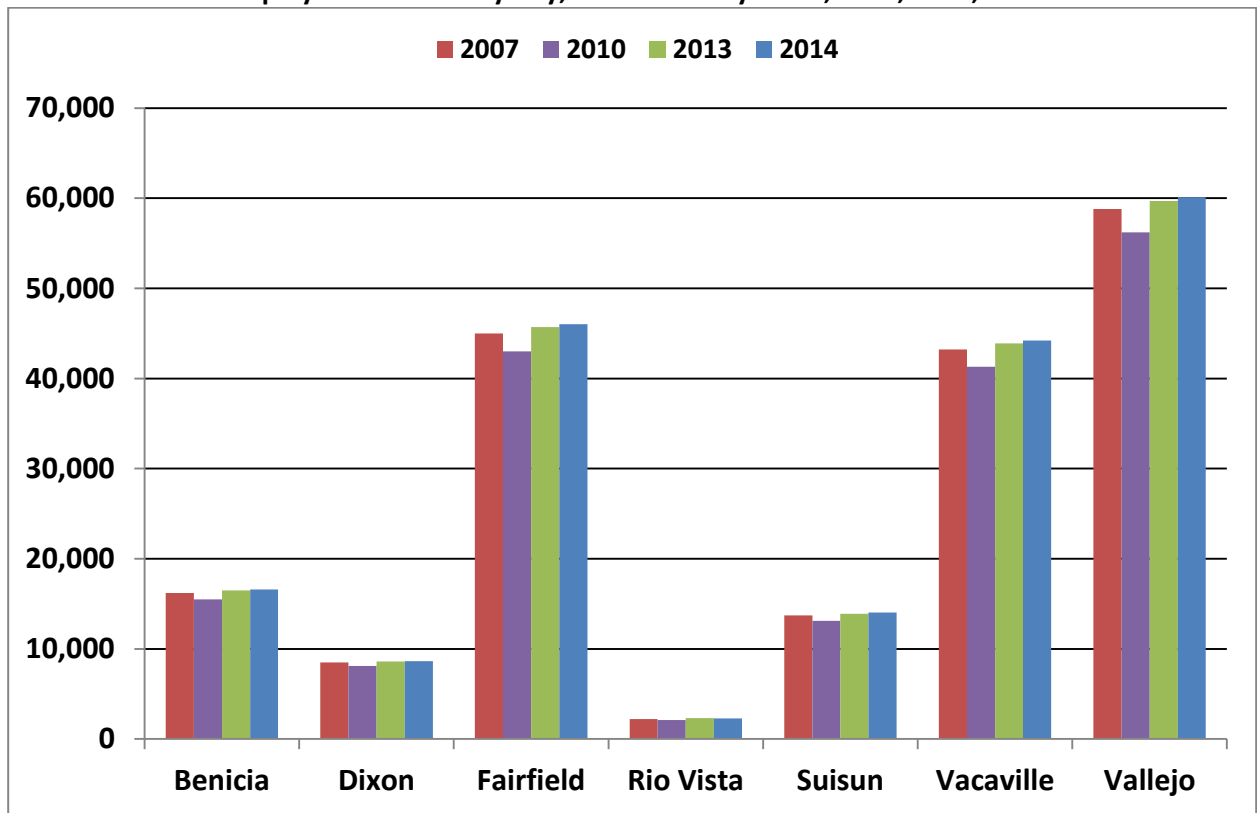
TAKEAWAY: Median household incomes have been on a trend decline since 2008, but successive years of economic growth throughout the region, the state overall and for the national economy are now all supporting higher household incomes.

WHAT IS IMPORTANT: Solano County’s median household income grew more quickly than other parts of the region, and shows that Solano County households continue to improve economically.

Cities Overview

The 2013 Index of Economic and Community Progress added a section to provide data on Solano County’s seven incorporated cities. Labor data for these incorporated cities are available from California’s Employment Development Department (EDD) to describe the cities’ residents, not the cities’ employers; the Department of Finance provides population projections and housing unit data for the seven cities and the unincorporated portion of Solano County. Using Bureau of Economic Analysis (BEA) data and EDD data combined, “gross city product” or GCP is shown as an estimate for the incorporated cities. In the “Our Changing Community” section, city-level demographic data are provided for more comparisons.

Employed Residents by City, Solano County: 2007, 2010, 2013, 2014



Source: California EDD (www.edd.ca.gov)

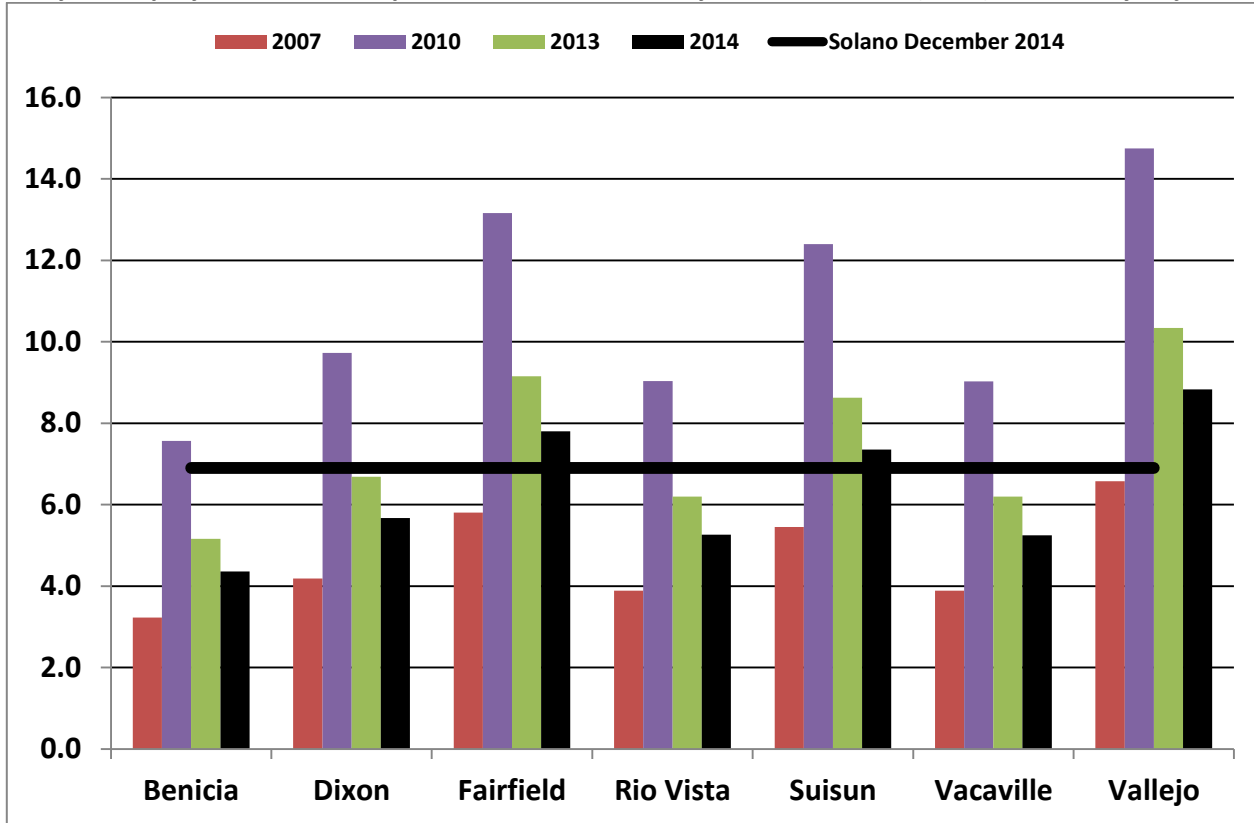
Fairfield, Vallejo and Vacaville are the obvious, larger cities in terms of employment. In terms of unemployment, fewer cities remain above the unemployment rate of Solano County overall as of December 2013. Notice in the unemployment rate comparison chart for Solano County’s cities that Vallejo, Fairfield and Suisun City have unemployment rates that are historically higher than the other cities and also higher than the December 2014 unemployment rate for Solano County overall.

TAKEAWAY: All cities continue to show employment growth since 2010, helping Solano County grow overall, especially in the larger cities

WHAT IS IMPORTANT: The slower growth of employment in Solano County’s larger cities in 2014 have slowed the growth of jobs overall in Solano County versus 2013.

Cities Overview (cont.)

City Unemployment Rate Comparisons to Solano County December 2014 (6.9%), Seasonally Adjusted



Sources: California EDD (www.edd.ca.gov)

TAKEAWAY: Some of the cities in Solano County remain at relatively high unemployment rates.

WHAT IS IMPORTANT: The relatively high unemployment rates in Vallejo and Fairfield signal opportunities to further assist workforce and economic development.

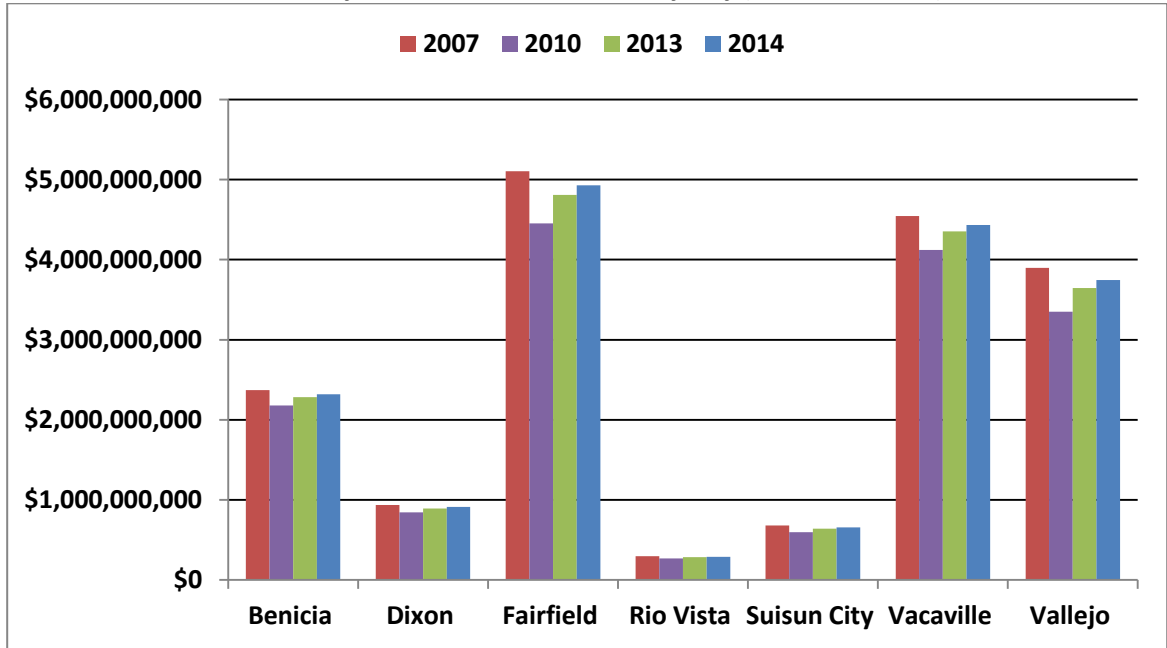
Gross City Product (GCP)

Cities contribute jobs and productivity to a broader area. Gross City Product (GCityP) is the same idea as Gross Domestic Product or Gross County Product: the total value of all final goods and services produced in the city limits in one year. The first chart provides real (inflation-adjusted) gross city product for each city in billions of 2010 dollars for 2007, 2010, 2013, and 2014. Like the jobs data above, these data are a signal as to how the countywide income level is growing.

The next table is the percentage change in GCityP for each city versus 2010, the year the recent recession ended. These tables show that the cities, like the county overall, have not reached pre-recession production levels yet, and that 2014 (like 2013) has been a year of growth across most cities and the county overall. Fairfield, Vallejo and Vacaville generate approximately 76 percent of Solano County gross domestic product, up from 72 percent in 2013.

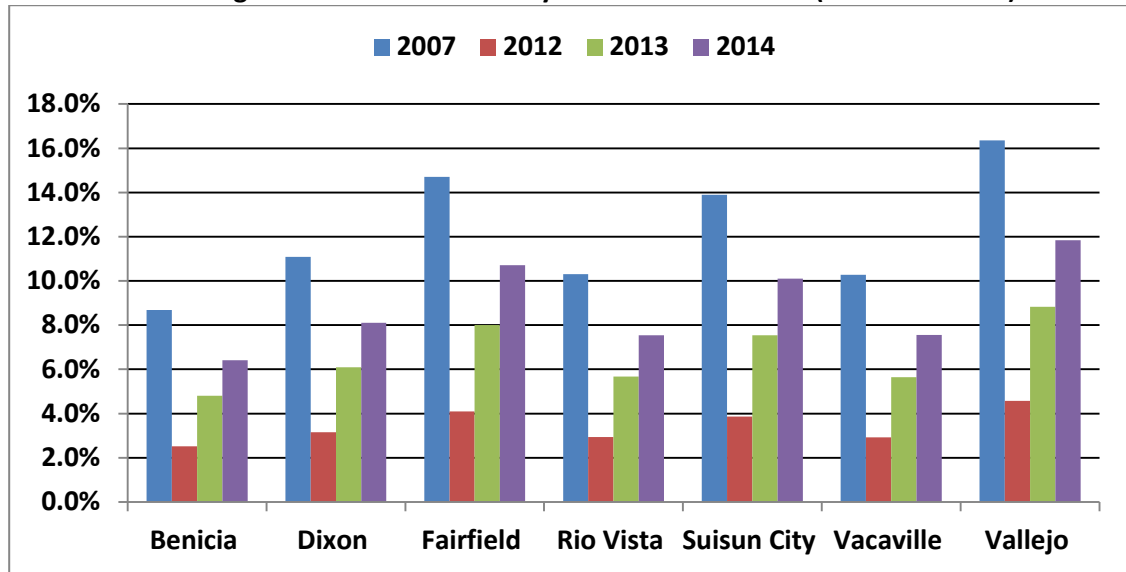
Cities Overview (cont.)

Gross City Product in 2010 Dollars by City (estimated data)



Sources: California EDD (www.edd.ca.gov), IMPLAN (www.implan.com)

Percentage Difference in Gross City Product versus 2010 (estimated data)



Sources: California EDD (www.edd.ca.gov), IMPLAN (www.implan.com)

TAKEAWAY: Income growth continues in Solano County’s cities, and the proportion of Solano County’s economy in the three large cities has grown since 2013.

WHAT IS IMPORTANT: Solano County’s economic growth depends on business and jobs vitality in Fairfield, Vacaville and Vallejo; given labor market data at the city level, Solano County still has room to grow.

Economic Base and Locally-Serving Industries: Moving Solano Forward

Moving Solano Forward provided specific industries and subindustries in Solano County with a focus on export markets (markets outside Solano County) and estimated levels of employment that serve these markets. These industries were contrasted with businesses that serve the local population in Solano County. This dichotomy is known as an “economic base” analysis. Base industries are industries that provide a foundation for the local economy to build wealth and income based on export income (drawing in funding from outside the local area). The table shows a broad mix of industries that have some components that are export focused (base industries).

The data here show the number of jobs in each industry for the second quarter of 2007, 2010, 2012, 2013, and 2014. The latest data for Solano County’s labor market that are official estimates (for subindustry estimates, we use the Quarterly Census of Employment and Wages or QCEW); note that preliminary estimates are from 2014 quarter 2, and thus we are comparing Quarter 2 from our comparison years.

Economic Base Industry Employment, 2007, 2010, 2012, 2013, and 2014 Q2

	2007 Q2	2010 Q2	2012 Q2	2013 Q2	2014 Q2
<i>Base Industries Total</i>	<i>31,596</i>	<i>32,401</i>	<i>31,963</i>	<i>32,375</i>	<i>30,779</i>
Agriculture	1,661	1,489	1,672	1,829	1,851
Mining	278	223	253	253	269
Wholesale Trade	3,958	3,986	3,958	3,596	3,689
Information	651	612	489	197	464
Finance and Insurance	1,080	991	917	1,006	966
Real Estate and Rental and Leasing	290	119	192	221	217
Professional, Scientific, Technical Services	180	266	159	268	298
Management of Companies and Enterprises	1,031	1,217	977	866	787
Arts, Entertainment, and Recreation	2,651	2,455	2,766	3,429	3,524
Accommodation and Food Services	684	701	796	786	792
Federal government	3,943	4,975	3,915	3,777	2,861
State government	4,334	4,618	4,692	4,580	2,861
Manufacturing	6,985	6,109	6,179	6,997	7,816
Retail Trade	2,209	2,334	2,148	2,465	2,122
Transportation and Warehousing	1,661	2,306	2,850	2,105	2,262

Sources: Moving Solano Forward and Bureau of Labor Statistics (www.bls.gov) and its Quarterly Census of Wages and Employment (QCEW)

Economic Base and Locally-Serving Industries: Moving Solano Forward (cont.)

Locally Serving Industry Employment, 2007, 2010, 2012, 2013, and 2014 Q2

	2007 Q2	2010 Q2	2012 Q2	2013 Q2	2014 Q2
<i>Locally Serving Industries Total</i>	74,537	68,902	68,249	73,333	75,802
Utilities	442	480	499	519	559
Construction	11,217	7,119	7,662	8,221	8,420
Information	633	586	547	596	544
Finance and Insurance	2,508	2,323	2,757	2,748	2,533
Real Estate and Rental and Leasing	1,292	1,218	1,005	1,057	1,065
Professional, Scientific, Technical Services	3,177	3,121	2,967	3,381	3,735
Admin and Waste Management Services	6,778	6,579	4,589	4,833	4,576
Educational Services	1,467	1,537	1,462	1,476	1,465
Health Care and Social Assistance	8,842	12,777	13,556	17,124	17,551
Arts, Entertainment, and Recreation	1,490	222	326	88	1,351
Accommodation and Food Services	462	438	468	464	406
Other Services	3,421	3,097	3,338	3,490	3,621
Local Government	16,680	15,380	14,566	14,437	14,798
Local Portion of Retail Trade	15,220	13,281	13,930	14,304	14,541
Local Portion of Transportation and Warehousing	908	744	577	595	637
Jobs in industries unassigned by MSF to date	22,798	21,332	21,451	19,331	20,863

Sources: Moving Solano Forward (MSF) and Bureau of Labor Statistics (www.bls.gov) and its Quarterly Census of Wages and Employment (QCEW)

TAKEAWAY: Base industry employment slipped a bit between 2013 and 2014, a sign of economic growth and more locally-serving jobs demand as the county economy grows.

WHAT IS IMPORTANT: The dichotomy between base and locally-serving allows economic development professionals to monitor how jobs are focused on external versus internal markets, and Solano County has seen overall growth in both categories since 2011.

Business Affordability: Wages

The Employment Development Department (EDD) of California publishes wage survey results annually for specific types of occupations. These occupations may have different industry settings; for example, a maintenance worker may be employed by a biotechnology firm, a retail store, or a hotel, but their core occupation is as a maintenance worker if changing employers. These jobs are labeled by Standard Occupation Classification (SOC) Codes, as shown in the tables below. The tables here refer to only the top-line occupation categories. Comparisons are to metropolitan statistical areas (MSAs) in CA. The 2010 data is repeated from the 2013 Index as a frame of reference.

Wages and Occupations, Solano County Compared to Other MSAs, % of State Average Wages in 2010

SOC Code	Occupations	CA	Solano	Sonoma	Napa	Sac	Oak	SF	SJ
00-0000	Total all	\$24.10	94%	95%	97%	98%	110%	125%	135%
11-0000	Management Services	56.64	88%	88%	97%	90%	102%	114%	123%
13-0000	Business and Financial Operations	34.98	93%	90%	94%	88%	106%	126%	119%
15-0000	Computer and Mathematical	42.16	88%	96%	88%	87%	98%	110%	126%
17-0000	Architecture and Engineering	41.56	84%	90%	90%	98%	103%	100%	116%
19-0000	Life, Physical, and Social Science	35.36	102%	101%	134%	92%	107%	117%	124%
21-0000	Community and Social Services	24.59	117%	88%	93%	101%	105%	107%	104%
23-0000	Legal Services	56.00	86%	97%	105%	82%	95%	112%	125%
25-0000	Education, Training, and Library	27.46	98%	92%	113%	95%	100%	109%	104%
27-0000	Arts, Design, Entertainment, Sports, and Media	31.60	70%	80%	68%	82%	94%	109%	104%
29-0000	Healthcare Practitioners and Technical	40.21	99%	95%	112%	103%	110%	112%	122%
31-0000	Healthcare Support Services	14.62	104%	110%	112%	104%	109%	122%	113%
33-0000	Protective Services	25.37	128%	114%	102%	97%	105%	97%	111%
35-0000	Food Preparation and Serving-Related	10.66	95%	104%	113%	99%	101%	114%	101%
37-0000	Building and Grounds Cleaning and Maintenance	13.23	104%	105%	103%	102%	111%	111%	104%
39-0000	Personal Care and Services	12.97	96%	111%	103%	96%	109%	125%	105%
41-0000	Sales and Related Services	18.93	82%	96%	102%	94%	108%	128%	129%
43-0000	Office and Administrative Support	17.82	100%	101%	103%	102%	110%	117%	117%
45-0000	Farming, Fishing, and Forestry	10.11	109%	121%	125%	114%	125%	177%	110%
47-0000	Construction and Extraction	24.62	105%	110%	105%	99%	115%	123%	114%
49-0000	Installation, Maintenance, and Repair	22.86	110%	104%	104%	101%	113%	113%	113%
51-0000	Production Jobs	15.95	119%	107%	122%	107%	113%	113%	114%
53-0000	Transportation and Material Moving Services	\$16.06	102%	99%	102%	100%	114%	123%	104%

Source: Employment Development Department, Occupations Data (www.edd.ca.gov)

In the 2014 data, the Bay Area metropolitan areas of Oakland, San Jose and San Francisco are all significantly above the state average in almost all occupations. Sacramento, another metropolitan area, is just trailing the state average in a lower-cost of living area. Solano County has more expensive labor in 2014 overall than in 2010 and now exceeds Napa and Sonoma Counties on average. Some categories in 2010 (education, business and finance), and 2014 was similar except for agricultural jobs. What these data provide is a way to look at the affordability of labor in each market versus other locations around California relative to each other. How Solano County's communities evolve in terms of population, housing and other ways that the cost of living may be affected will dictate local wage inflation.

Business Affordability: Wages (cont.)

Wages and Occupations, Solano County Compared to Other Areas, % of State Average Wages in 2014

<i>SOC Code</i>	<i>Occupations</i>	CA	Napa	Sonoma	Solano	Sac	Oak	SF	SJ
00-0000	Total all occupations	25.75	90%	93%	95%	98%	113%	127%	135%
11-0000	Management Services	59.97	90%	87%	87%	87%	105%	117%	126%
13-0000	Business and Financial Operations	37.65	93%	91%	98%	89%	107%	122%	117%
15-0000	Computer and Mathematical	46.37	82%	90%	85%	86%	101%	109%	122%
17-0000	Architecture and Engineering	45.53	87%	92%	88%	98%	105%	106%	115%
19-0000	Life, Physical, and Social Science	38.08	99%	88%	107%	96%	106%	121%	118%
21-0000	Community and Social Services	24.75	99%	95%	110%	102%	108%	106%	114%
23-0000	Legal Services	57.31	N/A	100%	72%	91%	92%	118%	116%
25-0000	Education, Training, and Library	27.64	97%	87%	96%	98%	106%	103%	101%
27-0000	Arts, Design, Entertainment, Sports, and Media	35.79	67%	72%	70%	70%	86%	95%	91%
29-0000	Healthcare Practitioners and Technical	44.38	102%	91%	110%	108%	115%	121%	117%
31-0000	Healthcare Support Services	16.11	108%	106%	106%	107%	116%	123%	110%
33-0000	Protective Services	25.63	83%	105%	124%	97%	107%	116%	101%
35-0000	Food Preparation and Serving-Related	11.05	116%	102%	99%	99%	99%	118%	104%
37-0000	Building and Grounds Cleaning and Maintenance	13.78	107%	108%	103%	105%	116%	117%	105%
39-0000	Personal Care and Services	13.09	99%	111%	94%	91%	102%	124%	106%
41-0000	Sales and Related Services	19.97	103%	96%	84%	94%	108%	132%	130%
43-0000	Office and Administrative Support	18.87	99%	103%	100%	100%	111%	119%	116%
45-0000	Farming, Fishing, and Forestry	10.00	127%	117%	119%	106%	126%	167%	123%
47-0000	Construction and Extraction	26.34	98%	107%	103%	95%	114%	116%	108%
49-0000	Installation, Maintenance, and Repair	24.02	100%	100%	108%	100%	111%	117%	110%
51-0000	Production Jobs	16.90	113%	105%	122%	108%	118%	117%	114%
53-0000	Transportation and Material Moving Services	16.71	99%	101%	101%	99%	117%	122%	103%

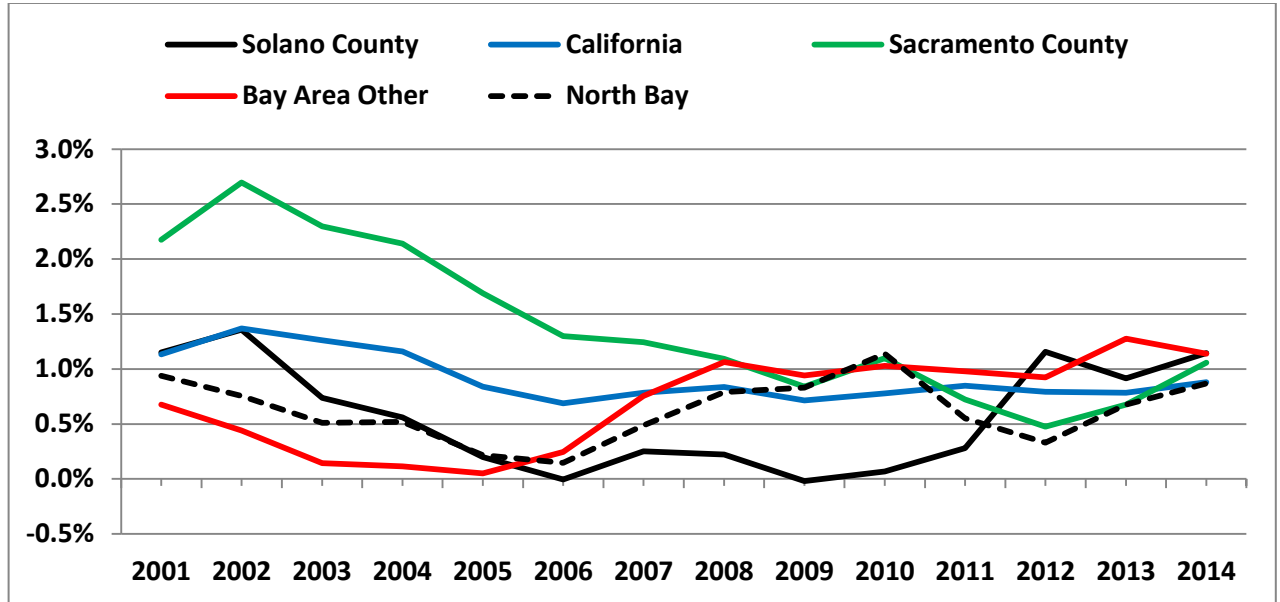
Source: Employment Development Department, Occupations Data (www.edd.ca.gov)

TAKEAWAY: Solano County is a place where labor, across most occupations, is less expensive for similar jobs than many other parts of the Bay Area outside Solano County and Sacramento’s MSA.

WHAT IS IMPORTANT: Relatively lower wages is just one component of a business’ choice to move into an area. Solano County has maintained relatively-low labor costs, which can attract businesses. Low labor costs versus the surrounding region also reflect a slower moving economy compared to counties where wage growth has accelerated.



Population Growth



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Solano County’s residents grew by 4,844 people in 2014. Regional population growth is a sign of a growing regional economy, but a growing economy leads to growing pains. Two examples are housing prices rising and more traffic. The Bay Area economy continues to grow residents at a relatively fast pace, seeing yet another increase in growth rates in 2014. California’s population grew at basically the same pace as Solano County, just under one percent. Sacramento’s metro area (MSA) also grew by 1.06 percent. Since 2010, Solano County has now seen its population grow by 3.5 percent. Sacramento and the state overall have grown in population slightly slower, 3.3 percent each. The Bay Area population outside of Solano County has risen 4.4 percent since 2010 and 7.6 percent since 2007. In 2014, the Bay Area outside of Solano County has just over 72,000 new residents. Sonoma and Napa counties combined grew at a slower pace of 0.9 percent or only 5,481 people since 2013.

Population Growth as Compared to 2014, Selected Areas (change in Total Population)

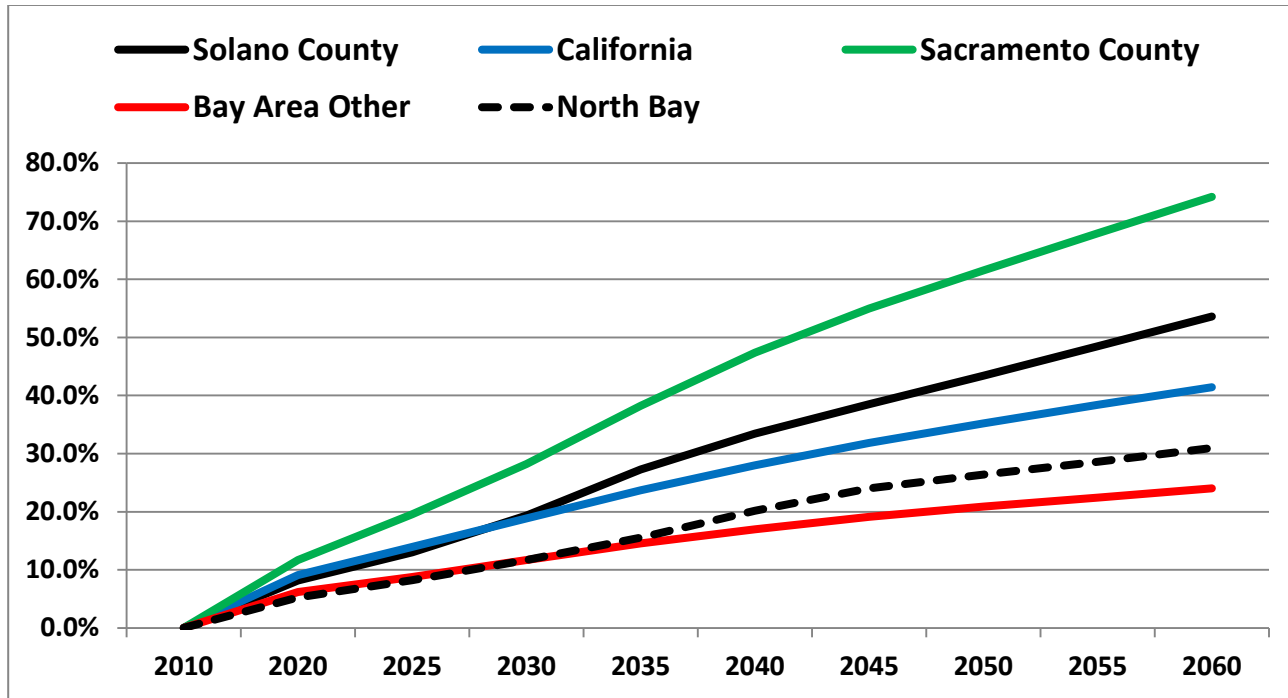
Place	2007	2010	2013	2007	2010	2013
Solano County	3.8%	3.5%	1.15%	15,745	14,629	4,844
California	5.8%	3.3%	0.88%	2,099,702	1,245,422	335,367
Sacramento MSA	6.1%	3.0%	1.06%	139,261	69,566	25,298
Rest of Bay Area	7.6%	4.4%	1.14%	451,385	269,095	72,079
North Bay	5.3%	2.4%	0.87%	32,016	15,191	5,481

Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

TAKEAWAY: Solano County’s population continued to grow in 2014 and is one of the faster pace area in the region.

WHAT IS IMPORTANT: Housing prices and job opportunities draw residents. The urbanized Bay Area counties (which make up all but Marin County in the “Rest of Bay Area” data) are drawing residents, jobs, and inbound commuters, some of which are choosing Solano County as a place to live.

Population Growth Projections



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Solano County is projected to have its population grow more quickly than any other county in the region beyond Sacramento County. The growth accelerates for Solano and Sacramento counties after 2030 and not as much for the state overall or the coastal counties of the Bay Area; California’s Department of Finance forecasts that Solano County will stay on pace with the state overall between 2014 and 2030, then accelerate from there.

Population Growth Projections 2020-2060, Selected Areas

Place	2010-20	2020-25	2025-30	2030-35	2035-40	2040-45	2045-50	2050-55	2055-60
Solano County	8.2%	4.5%	5.6%	6.6%	4.8%	3.8%	3.5%	3.5%	3.4%
California	9.1%	4.4%	4.3%	4.1%	3.5%	3.0%	2.6%	2.4%	2.2%
Sacramento MSA	11.7%	7.0%	7.3%	7.8%	6.6%	5.2%	4.2%	3.9%	3.7%
Rest of Bay Area	6.2%	2.4%	2.7%	2.6%	2.1%	1.8%	1.5%	1.3%	1.3%
North Bay	5.2%	2.8%	3.3%	3.4%	4.0%	3.2%	1.9%	1.7%	1.9%

Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

TAKEAWAY: Solano and Sacramento counties are projected to attract residents more quickly than the state and other parts of the Bay Area between 2014 and 2060.

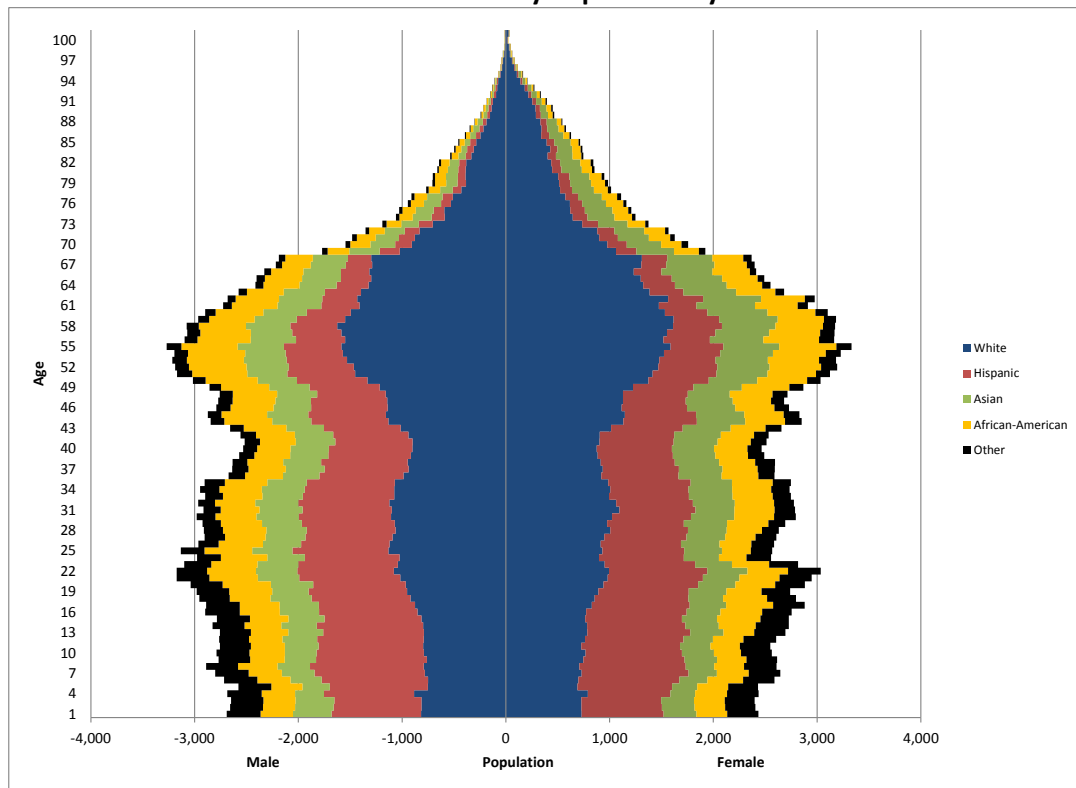
WHAT IS IMPORTANT: With such population growth projected, issues of job and housing opportunities will be a focus for workforce and economic development professionals in Solano County’s cities and the county overall.

Population Changes by Age and Ethnicity, 2014-2044

The California Department of Finance (DOF) generates population projections for all counties in California. These projections are split into categories based on ethnicity, age, and gender through 2060. One way to compare and contrast population data for past years and those projected is through the use of population pyramids. These pyramids are a graphic used in demographic research to look at age (the vertical axis) and gender mix (where females are positive and males are negative values on the horizontal axis). By using color differences within the pyramid, we can look at ethnicity and age dynamics in one figure; colored areas represent each ethnic group’s proportion of that year’s population.

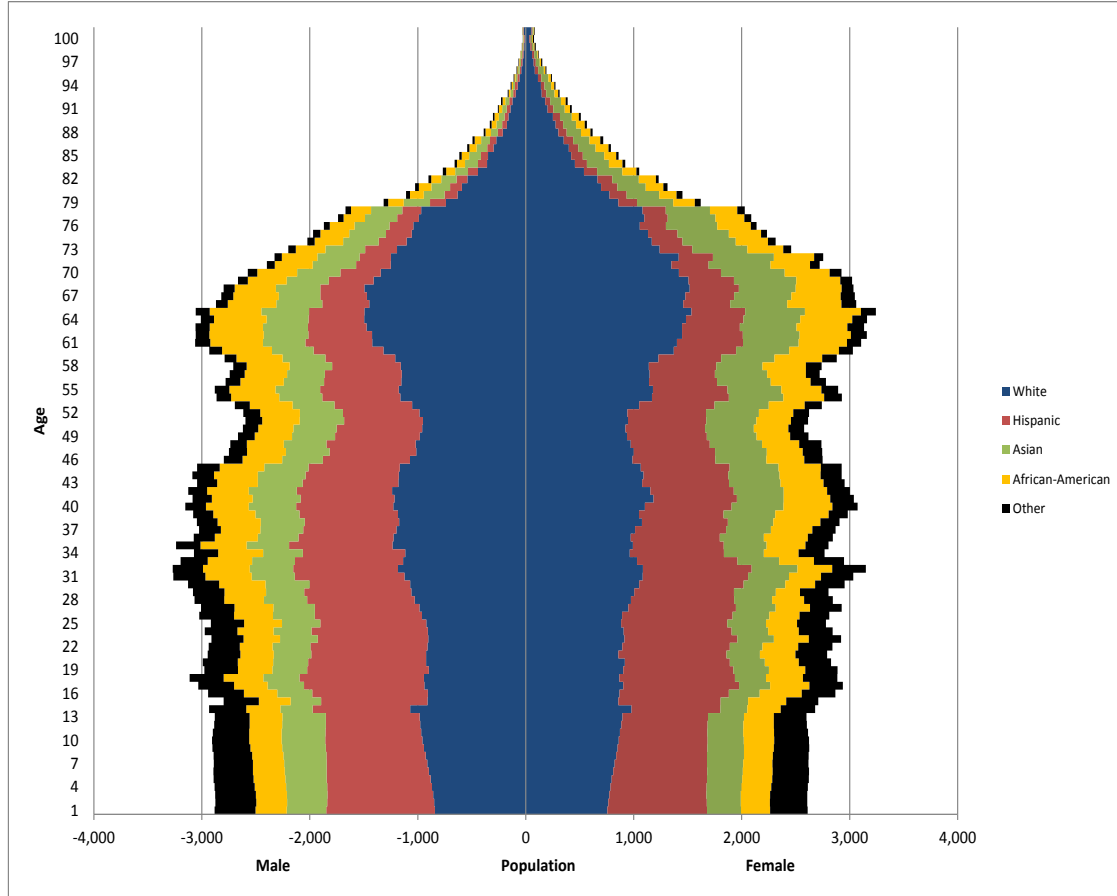
The following figures show these data for Solano County from 2014, 2024 and 2044. For Solano County, the Census data from 2010 stated that 41 percent of Solano’s population was white, 24 percent was Hispanic, 14.3 percent was Asian, and 14.1 percent was African-American as a point of reference. The 2014 ethnicity mix for Solano County is provided in the “Key Facts” section at the front of this Index.

2014 Solano County Population Pyramid



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

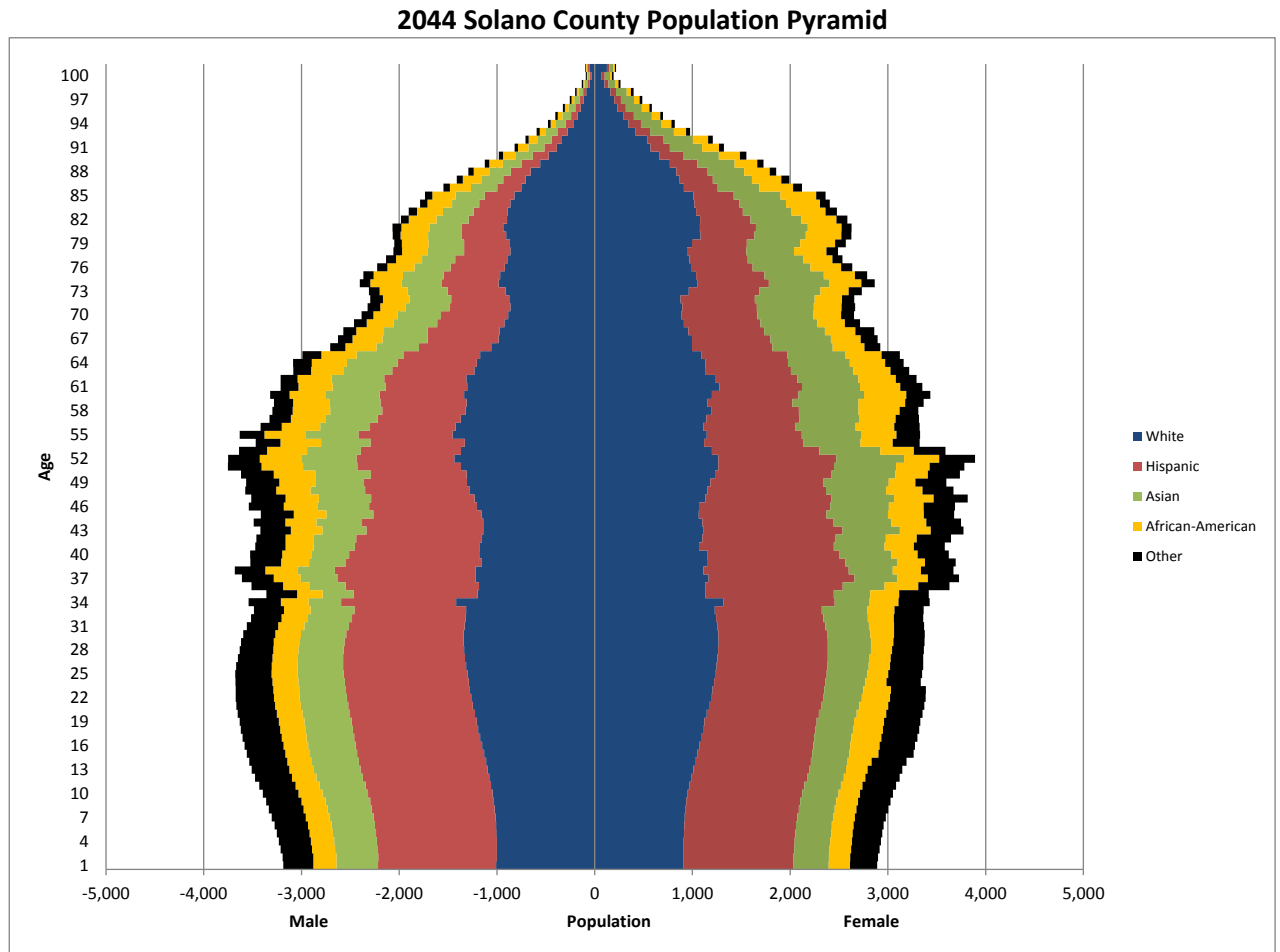
2024 Solano County Population Pyramid



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Predictions in 2024 include Solano County will be 39.1 percent White, 26.4 percent Hispanic, 14.5 percent Asian, and 12.6 percent African-American. In 2044, the Hispanic and White population will be closer to each other in proportions (35.5 percent to 31.1 percent); the 40-60 year olds will be the dominant age group. Demographers continue to foresee Hispanic population growth between 2010 and 2025, then this population will experience a slowdown in growth but still a rising proportion of the overall population; such change makes the shape of the pyramid more uniform between ages 40 and 60.

Population Changes by Age and Ethnicity, 2014-2044 (cont.)



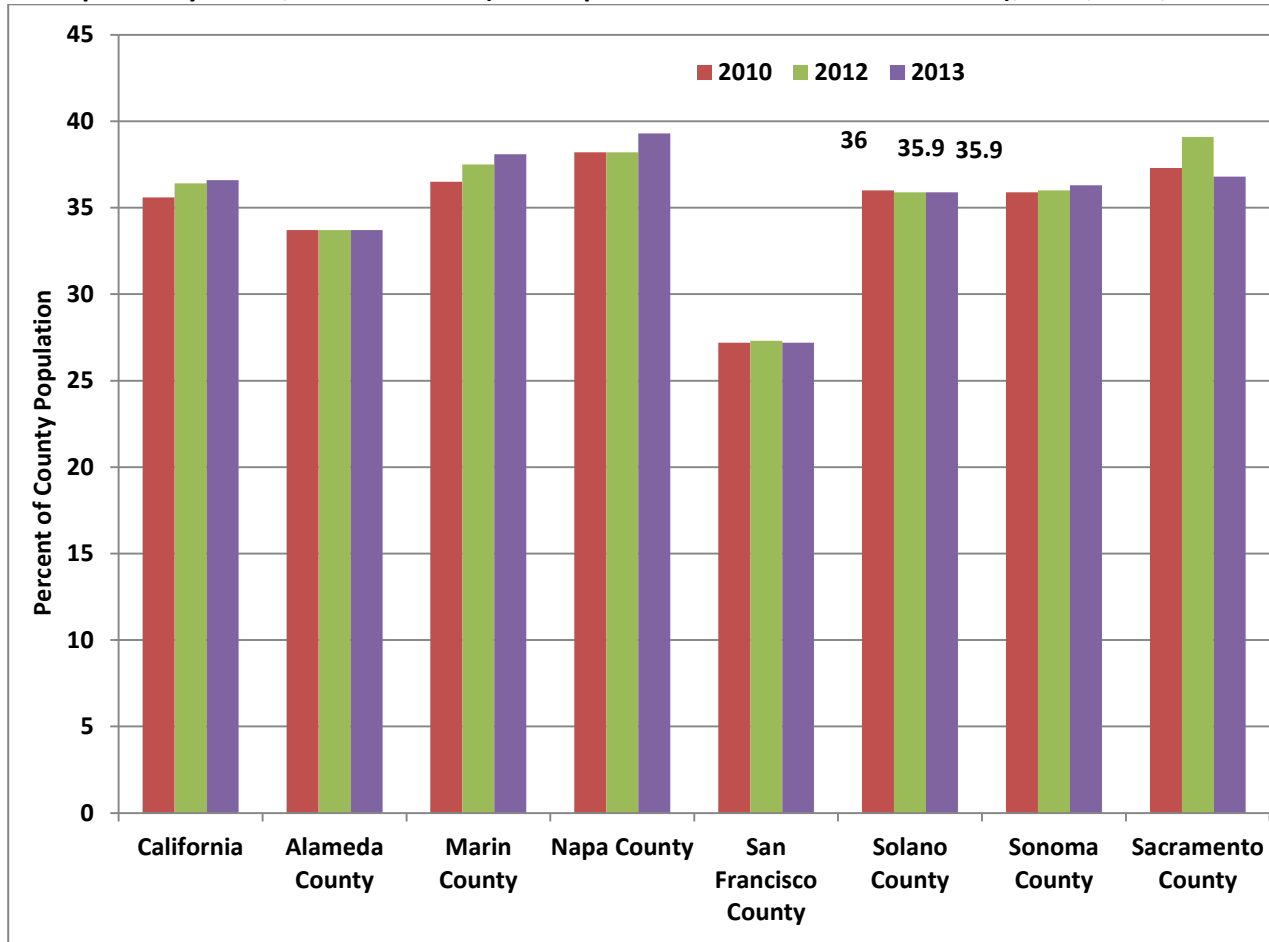
TAKEAWAY: Ethnic diversity and a growing Hispanic/Latino cohort are driving population growth in Solano County over the next 30 years.

WHAT IS IMPORTANT: Solano County is getting older alongside of a shifting ethnic mix; these changes present opportunities and challenges for Solano County over the next 30 years at least.

Dependency Ratios

Dependency ratios are a way to monitor our oldest and youngest populations and their evolution. The total dependency ratio is the sum of the percentages of the local population that are 65 and older and those less than 18 years of age. In theory, as this ratio rises, there are fewer residents who are of classic working age (18-64 years old). Demographic forecasts suggest Solano County is slowly losing population in the 18 to 64 year old range or becoming more dependent on non-labor income to support households.

Dependency Ratios, Selected Areas (% of Population under 18 and 65 and over), 2010, 2012, 2013

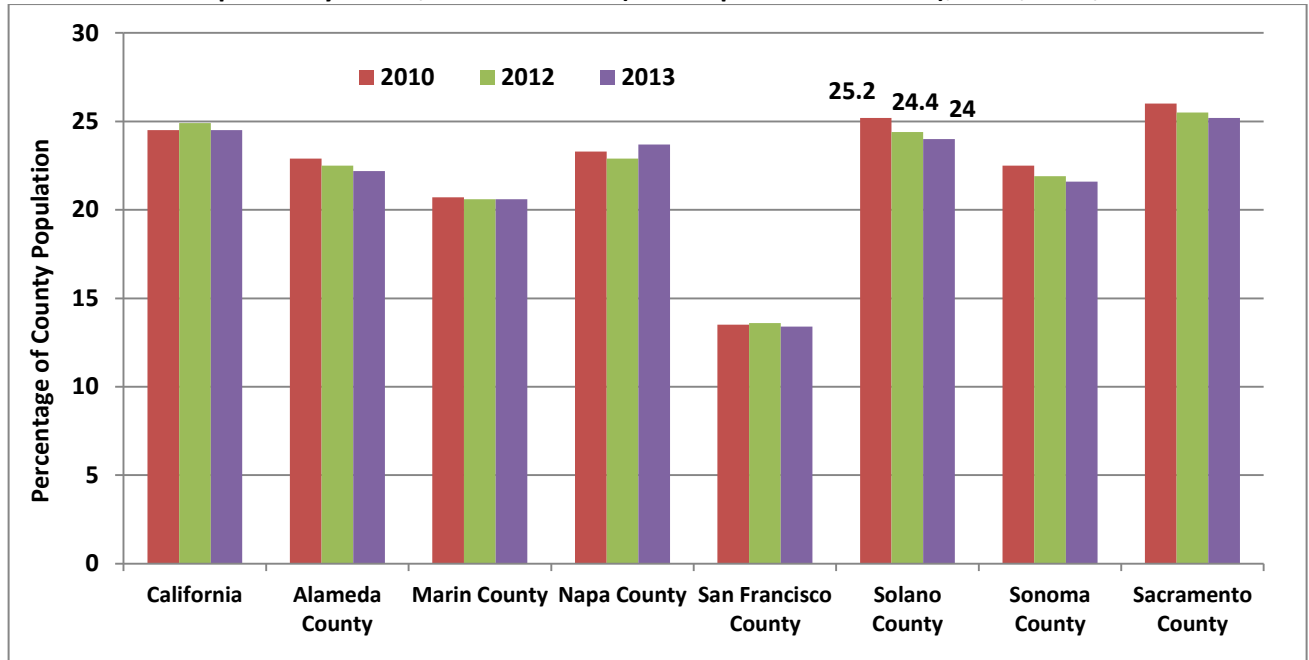


Source: Census Bureau (www.census.gov) at factfinder2.census.gov

Since 2010, Solano County’s data look more like Alameda and San Francisco counties and California overall, in terms of dependent populations, than Sonoma, Napa and Marin counties. The North Bay Counties are aging faster, but Marin County is aging more quickly, the driver of a more dependent population there. The following charts look at how much of this dependency is based on child births and how much is based on older residents. These charts have been adjusted from the 2013 version based on a calculation error by the author. The progressions are the same.

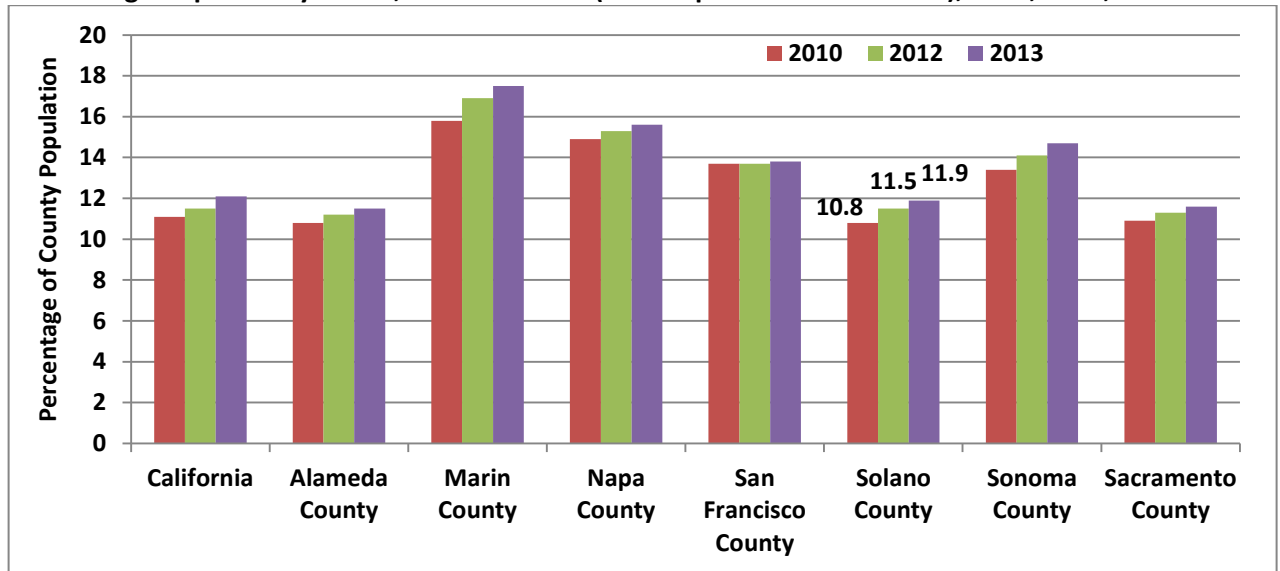
Dependency Ratios (cont.)

Child Dependency Ratios, Selected Areas (% of Population under 18), 2010, 2012, 2013



Source: Census Bureau (www.census.gov) at factfinder2.census.gov

Age Dependency Ratios, Selected Areas (% of Population 65 and over), 2010, 2012, 2013

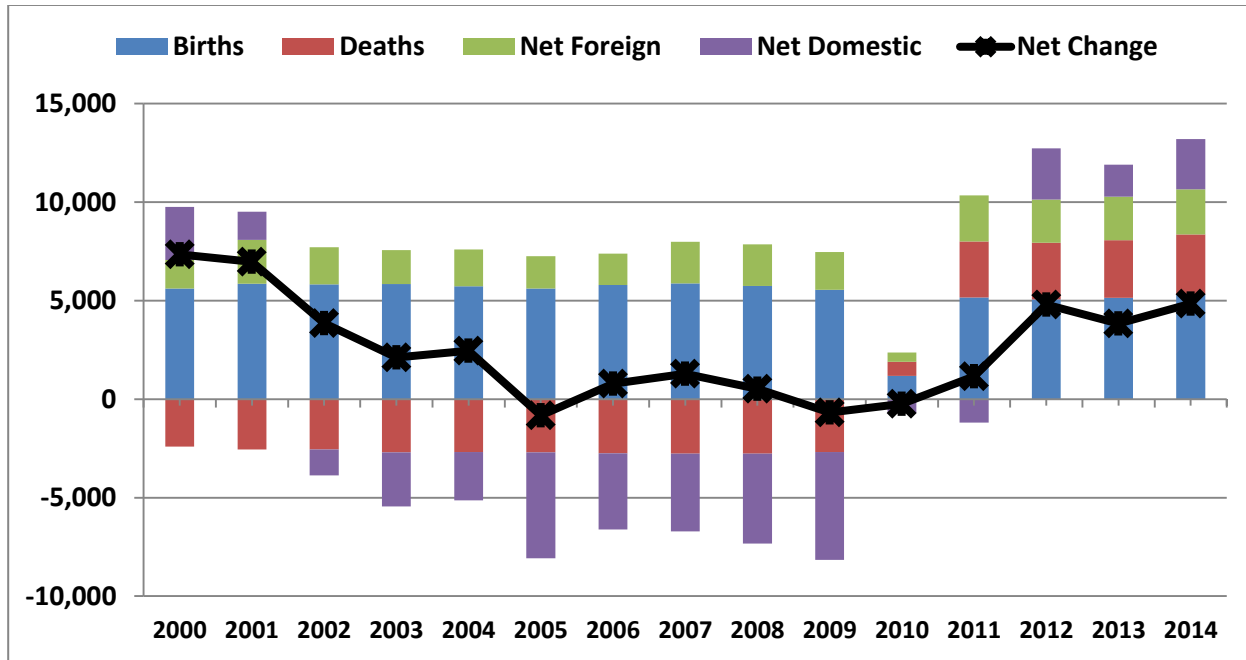


Source: Census Bureau (www.census.gov) at factfinder2.census.gov

TAKEAWAY: Solano County is slowly growing a population under 18 years old and more quickly growing in terms of residents over 65 years old.

WHAT IS IMPORTANT: There are more working-age residents (18 – 64 years old) in Solano County in 2014 versus 2005; workforce development strategies for both high school students and those over 65 years old will help support these county residents as they seek employment regardless of age.

Components of Population Change



Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Net foreign immigration rose again, meaning more people came from outside the United States to Solano County. However, more people came to Solano County from other parts of the United States also. Approximately 1,063 people moved to Solano County from other parts of the United States. Births and deaths both increased slightly.

Change in Population Change Components as Compared to 2014, Solano County (% change)

Year	Births	Deaths	Net Foreign	Net Domestic	Net Migration	Net Increase
2007	-9.5%	-210.0%	8.4%	-164.9%	-157.9%	3.7%
2010	348.4%	327.9%	379.0%	-462.0%	1,671.7%	3.4%
2012	5.1%	5.7%	4.3%	-1.8%	28.5%	2.1%
2013	3.5%	3.8%	3.1%	58.1%	-3.0%	1.1%

Source: California Department of Finance, Demographic Research Unit (www.dof.ca.gov)

Since 2010, net migration has delivered an increase of 3,518 people to Solano County. The county population has grown due to natural increase, the difference between births and deaths, has grown Solano’s population by 14,629 people.

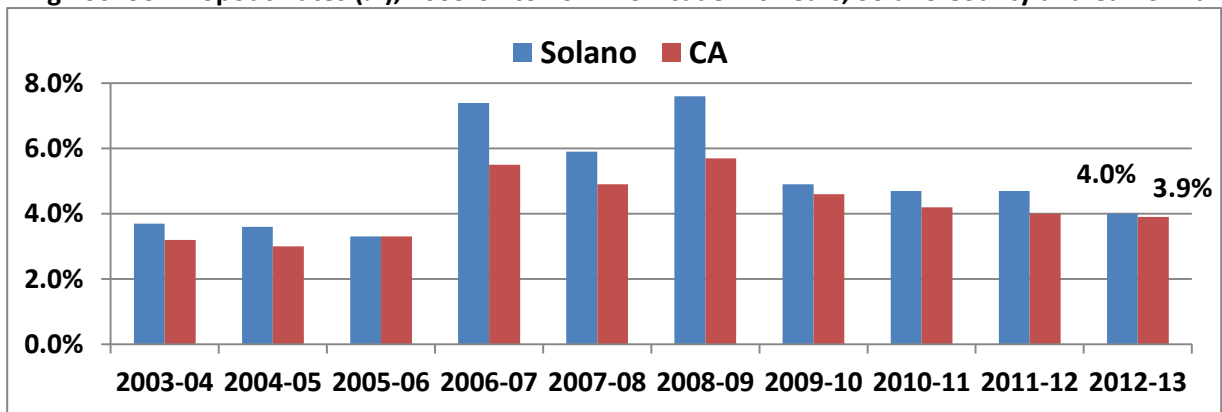
TAKEAWAY: Solano County’s population continues to grow due to both more births and the inflow of new residents from other parts of the United States in 2014.

WHAT IS IMPORTANT: Monitoring the age characteristics and new Solano County residents who are also working in Solano County (rather than commuting elsewhere) is another data point for workforce and economic development efforts to monitor (the latest commuting data is from 2011).

Dropout Rates Compared to California

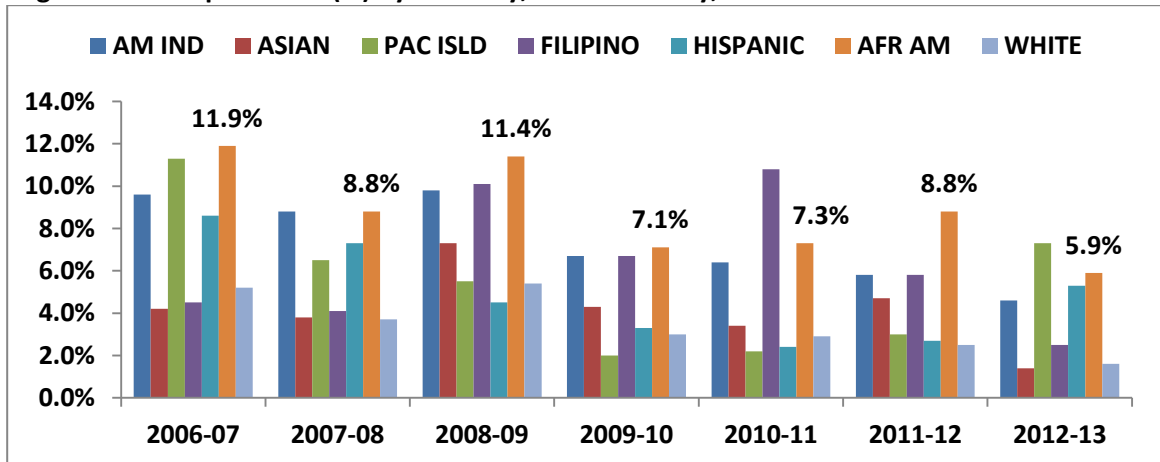
Dropout rates in Solano County continue to fall. Since the 2005-06 academic year, Solano County has seen the gap between county dropout rates and the state overall rise in recession and then slowly fall back toward par. As of the 2012-13 school year, Solano County is back very close to the state on average. This is a good sign of Solano County's economy providing income to families to allow high school students to remain in school and receive their diploma. Pacific Islander and Hispanic students, however, saw a slight increase in their dropout rates in the 2012-13 academic year. African-American dropout rates fell and are now close to those for Hispanic students, and Asian students have the lowest dropout rates. In the 2012-13 academic year, the dropout rate for African-American students is down to 5.9 percent from 8.8 percent in 2011-12.

High School Dropout Rates (%), 2003-04 to 2012-13 Academic Years, Solano County and California



Source: California Department of Education (cde.ca.gov)

High School Dropout Rate (%) by Ethnicity, Solano County, 2006-07 to 2012-13 Academic Years



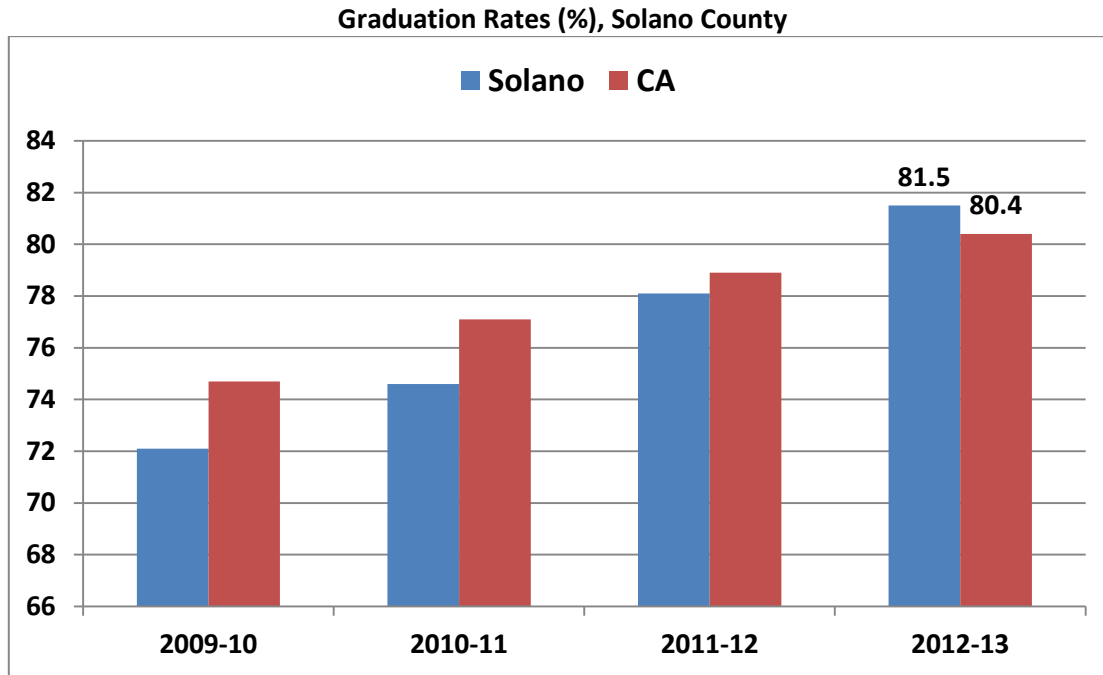
Source: California Department of Education (cde.ca.gov)

TAKEAWAY: Dropout rates have fallen overall for county students, though Pacific Islander and Hispanic students have higher dropout rates from high school in 2012-13.

WHAT IS IMPORTANT: African-American dropout rates have decreased, as have other ethnicities, signs that incomes are rising and helping stabilize families across Solano County.

Graduation Rates

Solano County saw its graduation rates rise above the state of California in 2012-13. Solano County had 81.5 percent of those eligible to graduate do so, where California was 80.4 percent. Along with dropout rates falling in the 2012-13 academic year, there is continued, good news for Solano County schools and workforce development.



Source: California Department of Education (cde.ca.gov)

Note: There was a methodological change at the Department of Education that does not allow a comparison before 2009-10 with the most recent data

Graduation Rates by Ethnicity, 2012-13

Ethnicity	Solano County	California	Difference
American Indian or Alaska Native, Not Hispanic	73.5	72.8	0.7
African American, Not Hispanic	69.9	68.1	1.8
Two or More Races, Not Hispanic	91.2	84.5	6.7
White, Not Hispanic	88.2	87.7	0.5
Asian, Not Hispanic	91.0	91.6	-0.6
Hispanic or Latino of Any Race	75.7	75.7	0.0
Filipino, Not Hispanic	87.8	91.6	-3.8
Pacific Islander, Not Hispanic	81.0	78.4	2.6

Source: California Department of Education (cde.ca.gov)

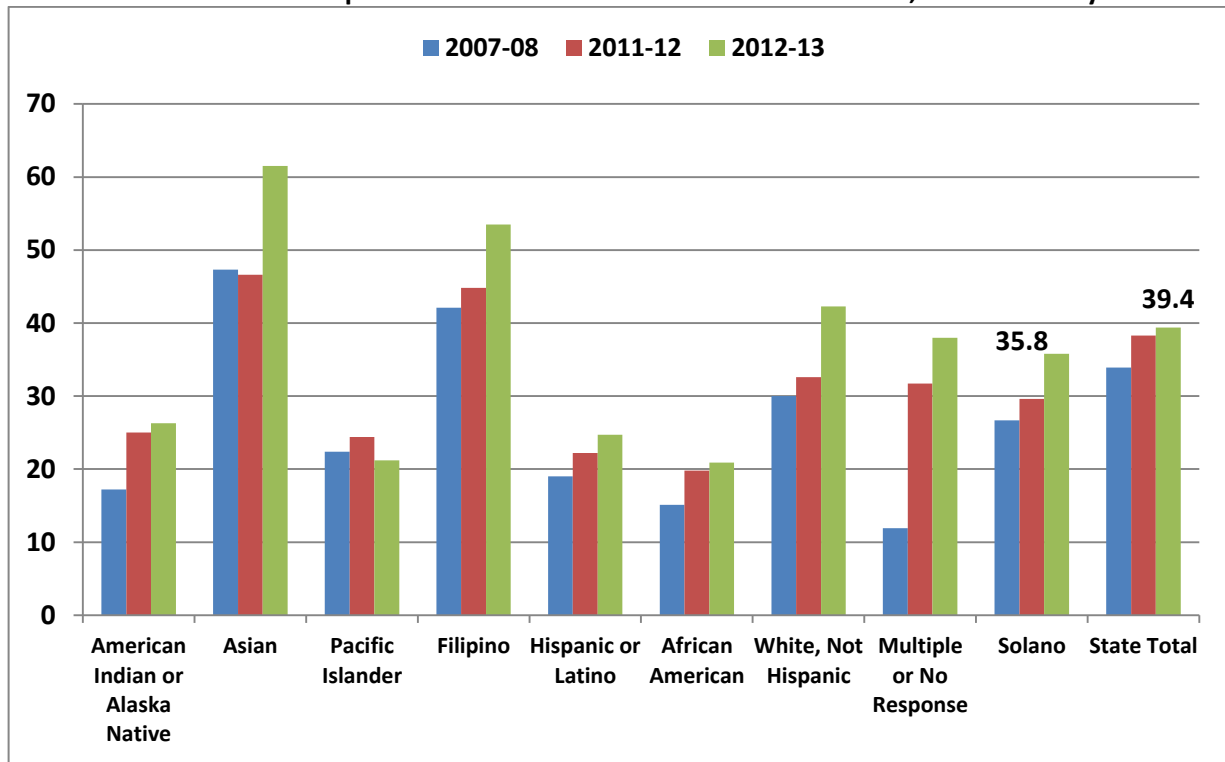
Note: There was a methodological change at the Department of Education that does not allow a comparison before 2009-10 with the most recent data

UC/CSU Ready Graduates

High schools help prepare local students to attend either a California State University (CSU) or University of California (UC) system campus in pursuit of a bachelor’s degree. Both Solano County and the State of California, since the 2007-08 academic year, have shown increases in the number of students who are eligible to attend either UC or CSU campuses upon high-school graduation. Solano County saw a quick increase in the number of students eligible in the 2012-13 academic year, an increase of 6.2 percentage points from 29.6 percent to 35.8 percent. A gap still exists between Solano County and the state in terms of high school graduates who are UC/CSU eligible, but Solano County students are rising.

Looking at the ethnicities of seniors, all ethnicities saw an increase in UC/CSU readiness in 2012-13 except for Pacific Islander students that are not Filipino. This trend is a sign that Solano County schools have made adjustments to assist in college readiness and more students are college ready in local high schools as a result.

Percent of High-School Graduates that Are UC/CSU Ready, 2007-08 Compared to 2011-12 and 2012-13 Academic Years, Solano County



Source: California Department of Education (www.cde.ca.gov)

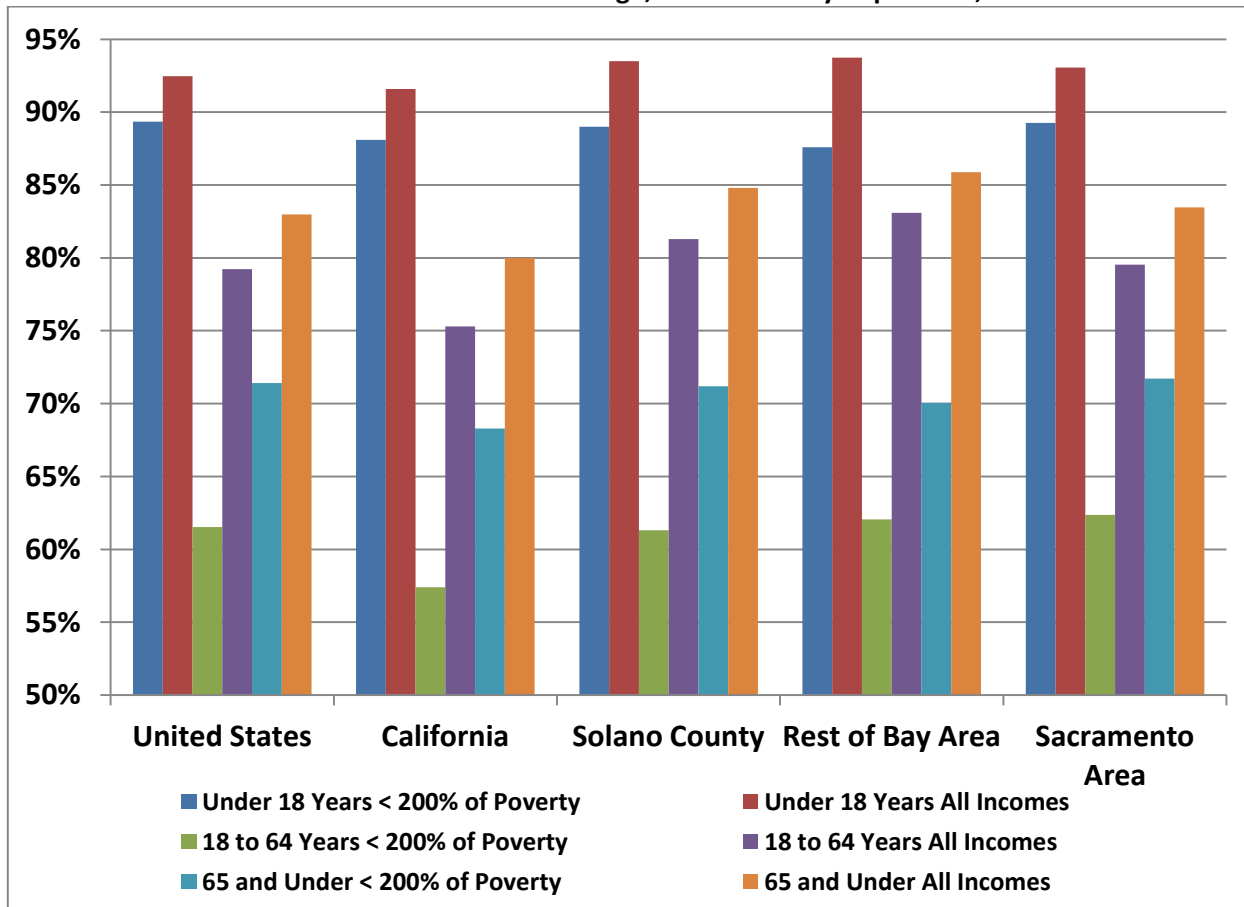
TAKEAWAY: Graduation rates are now slightly higher in Solano County versus California, and African-American students are graduating at a higher rate in 2012-13 in Solano County than the state overall.

WHAT IS IMPORTANT: Solano County still has a gap between local students ready for UC or CSU admission versus California, but that gap continues to close since the 2009-10 academic year.

Health Insurance Coverage

The introduction of the Affordable Care Act (ACA) in 2014 reduces the need to watch data on health insurance coverage in any local area. However, these data help to confirm hypotheses that coverage will rise. For many public health clinics, the introduction of ACA has not been as game changing as the expansion of Medi-Cal services and eligibility. The increase in services provided has increased demand during 2014. Because these data lag almost two years, the data will show the ramp-up to ACA and effects of Medi-cal's changes.

Percent Health Insurance Coverage, Solano County Population, 2012

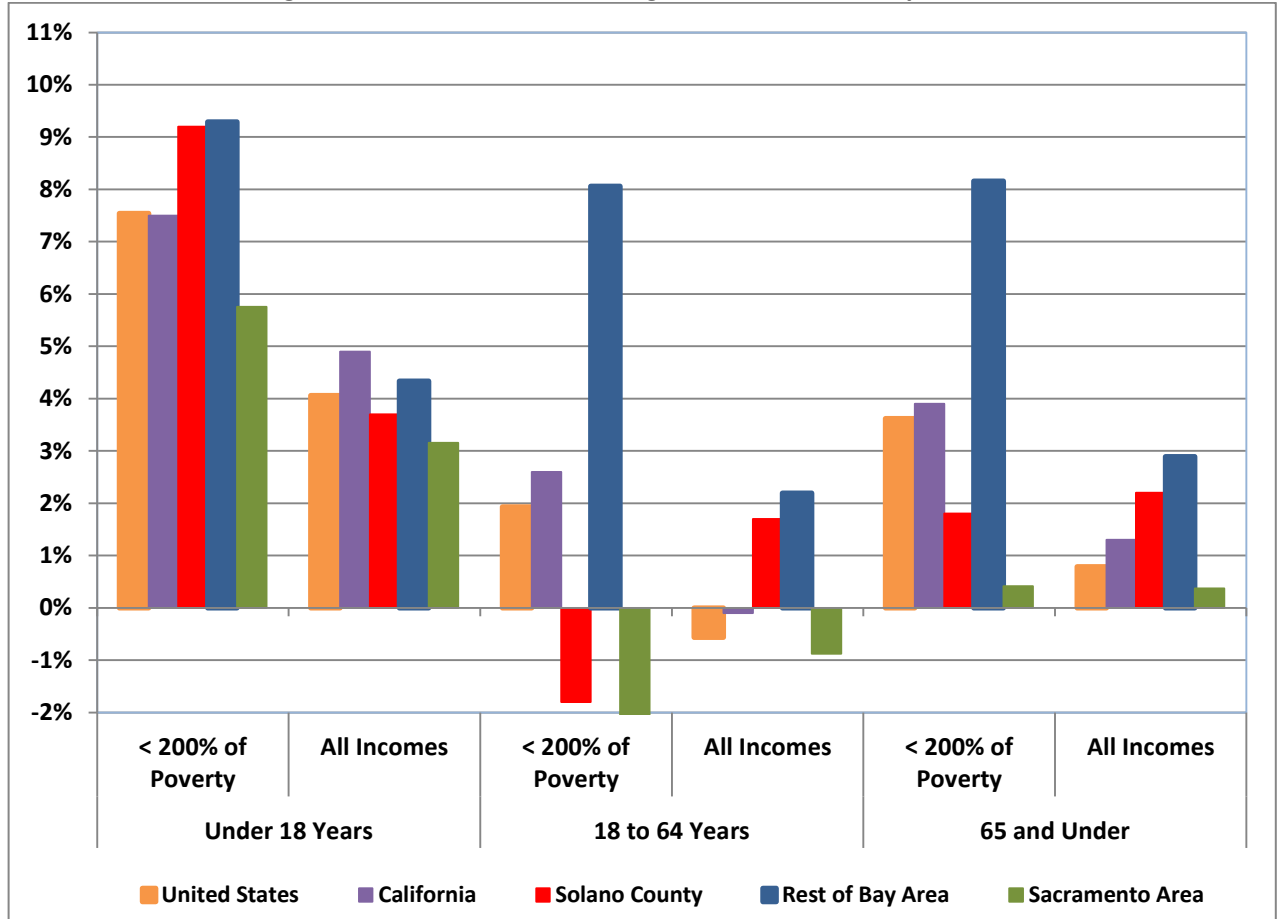


Source: SAHIE (Small Area Health Insurance Estimates), Census Bureau, www.census.gov/did/www/sahie/

In 2012, Solano County covered more residents less than 18 years of age than any other selected area in the figure below. Solano County also covered its residents in poverty as well or better than any other region selected. The percentage change in coverage will be the key data to watch as the data begin to show how local areas are reacting to ACA and other changes in 2013 and 2014. Since 2006, Solano County has struggled to keep its 18 to 64 year old population at medium to lower incomes insured.

Health Insurance Coverage (cont.)

Percent Change in Health Insurance Coverage, Selected Areas Population, 2006 - 2012



Source: SAHIE (Small Area Health Insurance Estimates), Census Bureau, www.census.gov/did/www/sahie/

TAKEAWAY: In the 2012 data, Solano County continues to show its ability to provide health care across all income levels as compared to other areas but has seen some loss lower incomes specifically.

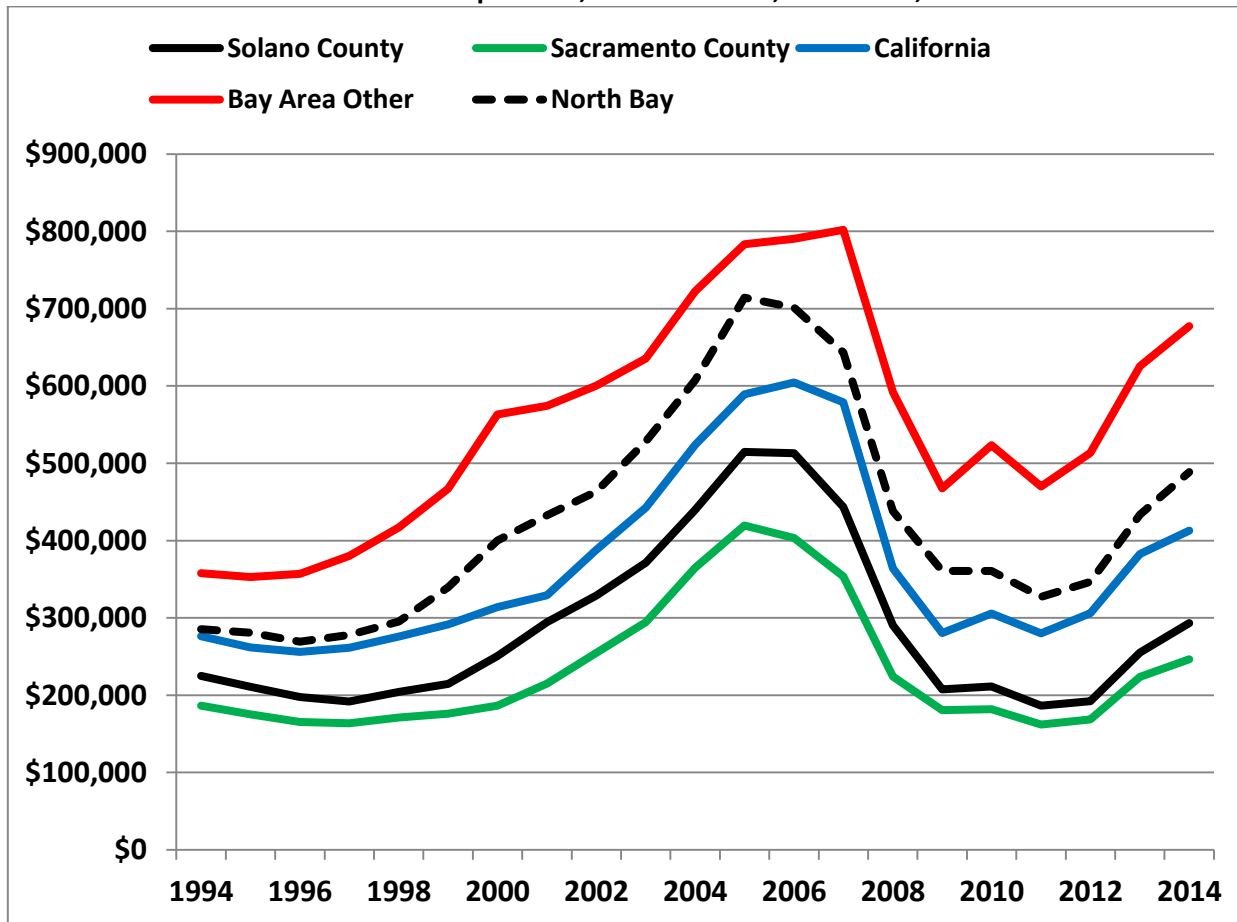
WHAT IS IMPORTANT: Changes in national and state-level health care assistance and insurance markets will show up in these numbers across all areas as the 2013 and 2014 data become available. For those between 18 and 64 years old at low to medium incomes (< 200% of poverty level), the lower level of coverage is likely due Solano and Sacramento counties having jobs where health coverage is not directly provided and thus leads to more reliance on public health.

Median Home Prices

Housing markets continued their recovery and expansion in 2014 in terms of median home price. After some relatively slow movements in both 2011 and 2012, 2013 was a throwback to the mid-2000s for Solano County and almost all regional housing markets. The continued expansion of median home prices was tempered a bit by a lack of inventory, but not a lack of demand. As the supply side of the market cleared out many of the foreclosed and negative equity properties in 2013, there was a slow change in the number of housing units available for sale in 2014, which contributed to the change in units sold falling from a peak in early 2014 (see the figure below). When prices rise and number of units sold fall, it is a sign of excess demand conditions in a market.

Solano County housing prices follow regional and state trends because housing is a supra-regional market. As workers are willing to commute, watching one county's median home prices is not necessarily illustrative of the overall market place. As in other housing market expansions, the North Bay counties are more expensive neighbors to Solano County; Sacramento's housing market is slightly less expensive than Solano County, and Solano County's median home prices remains lower than California on average.

Median Home Price Comparisons, Selected Areas, 1994-2014, 2010 Dollars



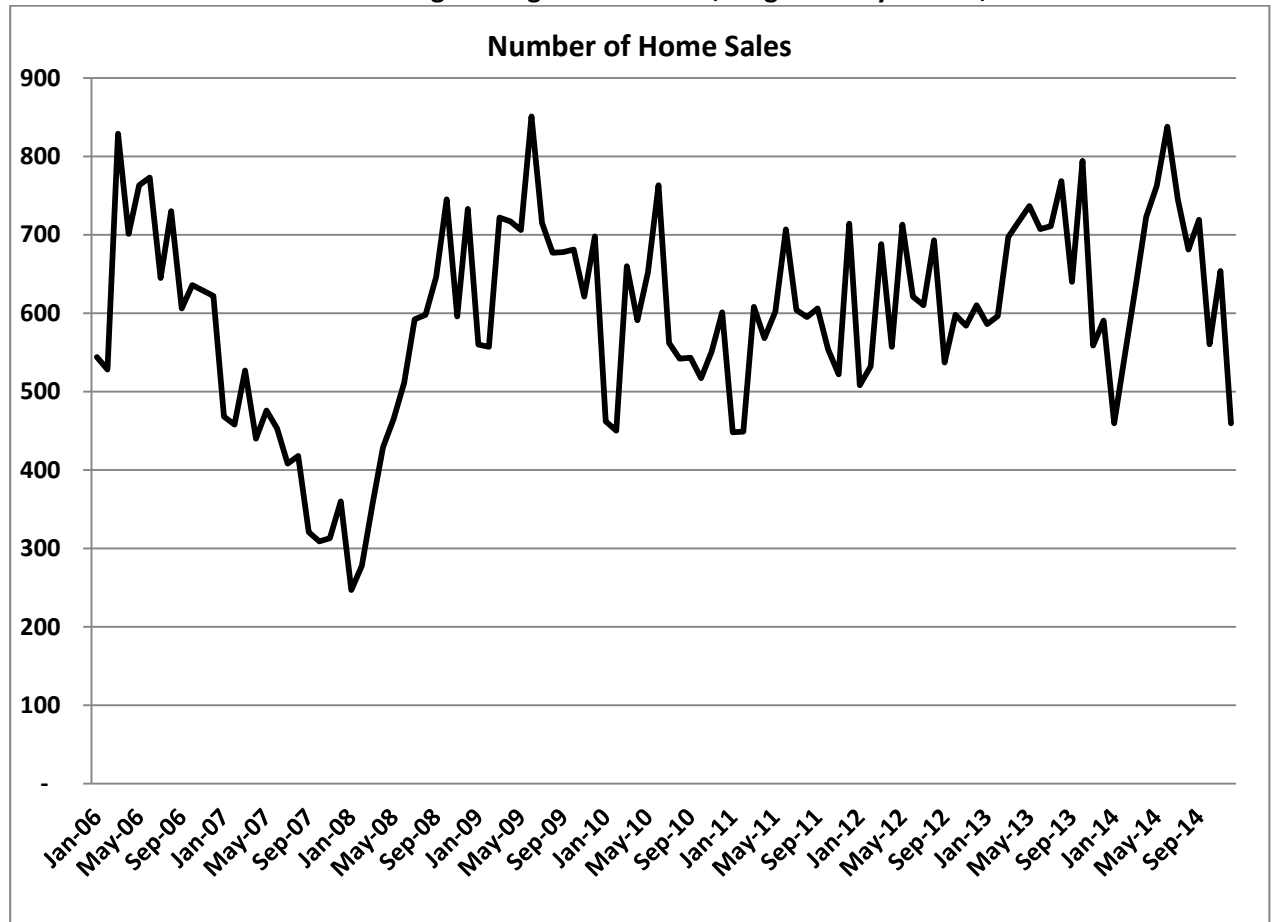
Sources: DataQuick and California Association of Realtors

Note: Sacramento County is shown alone (rather than the metro area) because there is not similar data over time for Placer, Yolo and El Dorado counties.

Median Home Prices (cont.)

Solano County’s median home prices have grown by 58.6 percent from December 2010 to December 2014 according to the California Association of Realtors; the lowest, monthly price – according to the California Association of Realtors – was in February 2012 at \$179,020. The median home price is \$324,070 as of December 2014. For the state of California, the bottom was hit in February 2009, and state-level median prices have grown 48.5 percent since December 2010. The growth in housing prices since December 2010 is fastest in Solano County of the regional areas covered in this study and the state overall.

Year on Year Percentage Change in Unit Sales, Single-Family Homes, 2006-2014



Sources: DataQuick and California Association of Realtors

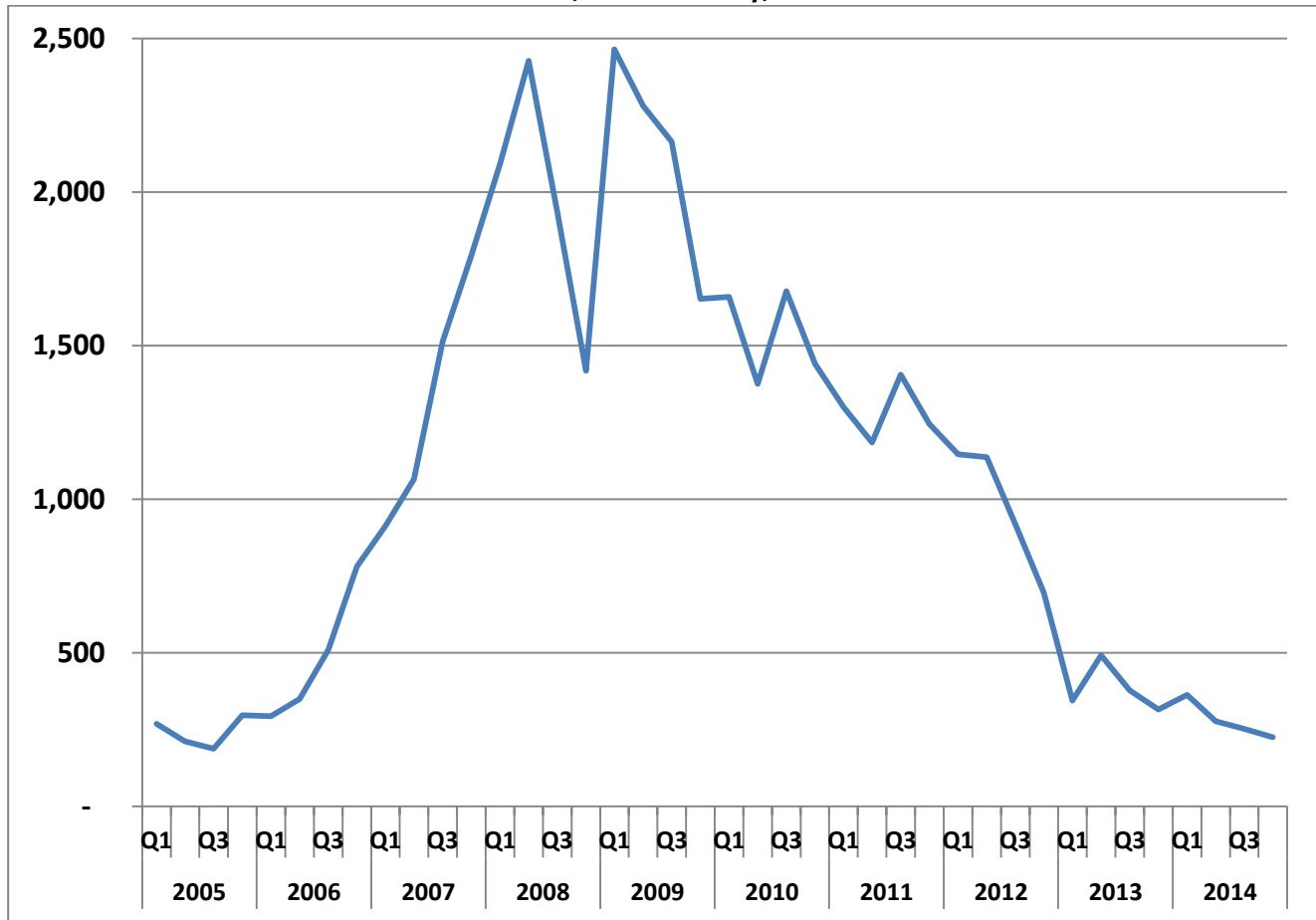
TAKEAWAY: 2014 was a year of relatively low inventory, but a year of continued growth in housing wealth for Solano County’s homeowners at the median nonetheless. Living in the Bay Area’s urban and coastal areas adds a premium to home prices in those areas.

WHAT IS IMPORTANT: Home prices rising are both a blessing and curse. Rising home prices increase wealth of homeowners but also reduce housing affordability.

Foreclosure Activity

As home prices rise, foreclosure activity wanes due to rising wealth in housing markets. It is fair to say that the markets for foreclosures have normalized after almost five years of activity that was driven by a confluence of financial, labor and housing market problems. Foreclosures happen when homeowners default on their mortgage payments, and those defaults have slowed dramatically since 2012. As compared to 2008, foreclosures are down across Solano County (-78.9 percent), the rest of the Bay Area (-77.4 percent) and across California (-79.0percent). In Solano County, the number of foreclosures was 1,117 in 2014; in 2009, that number was 8,561.

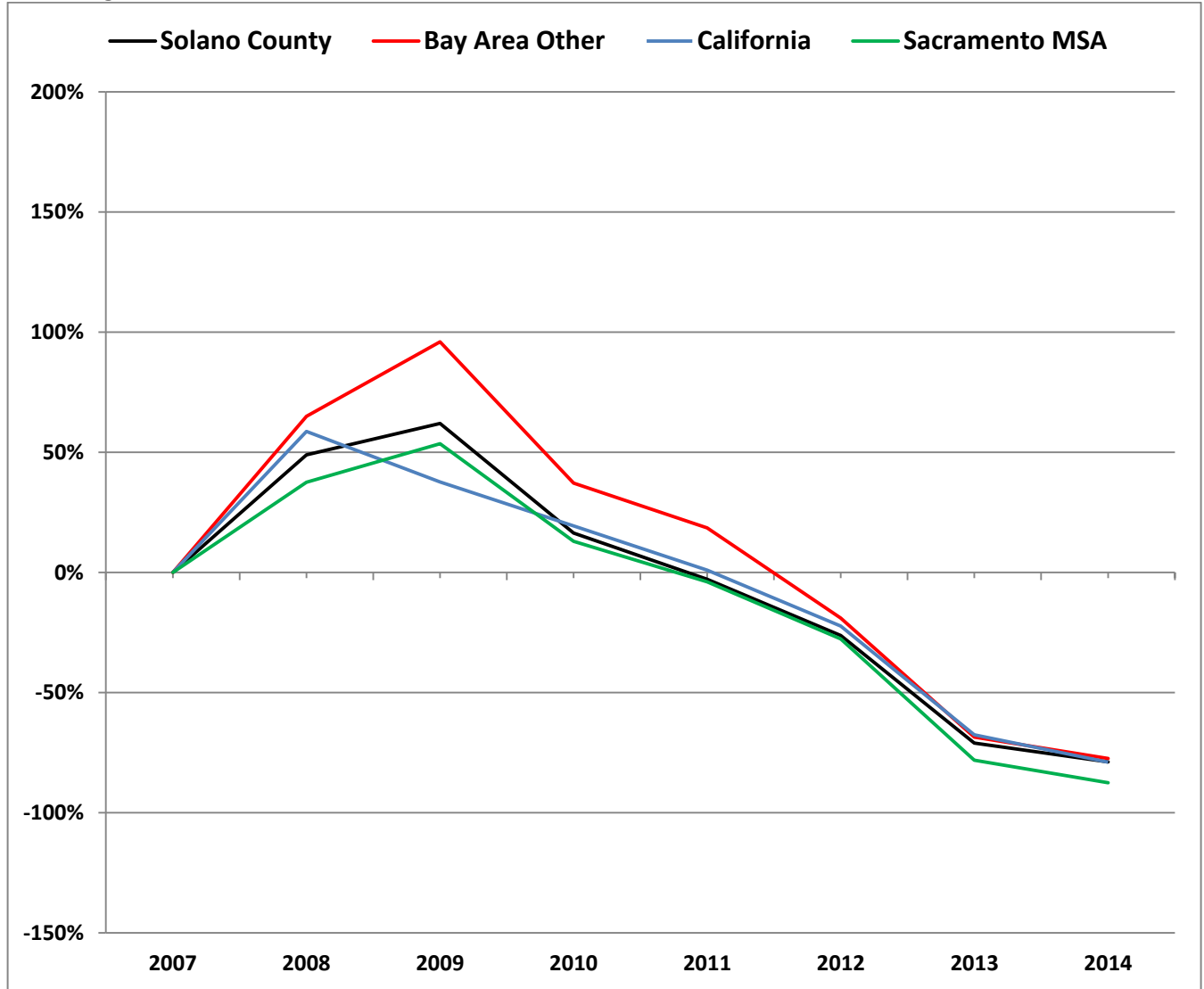
Notices of Default, Solano County, 2005 – 2014



Sources: DataQuick and California Association of Realtors

Foreclosure Activity (cont.)

Change in the Number of Foreclosures, Year to Year, 2007-2014, Selected Areas, Relative to 2007



Sources: DataQuick and California Association of Realtors

TAKEAWAY: Notices of Default continue to fall and corroborate that, along with rising home prices, Solano County has emerged from the housing market downturn.

WHAT IS IMPORTANT: Coupled with housing prices rising, wealth has been restored to homeowners in Solano County and reduced the probability of foreclosure.

Housing Affordability: Housing Prices Versus Median Household Income

One of the opportunity costs of rising home prices and a low inventory level is detrimental, downward pressure on housing affordability. The California Association of Realtors provides a way to look at housing affordability through a “Housing Affordability Index” or HAI. The HAI takes household income levels and an estimate of the cost of owning a home (mortgage, average cost of utilities and maintenance, etc.), and compares them to determine the population percentage that can afford to buy a home at the current median home price. While state and national inflation have been held in check outside of housing, fewer households can afford a home, which increases demand for rental properties as population rises, driving rental prices up. Higher wage demands are likely to follow.

As has been true since 2010, Solano County remains a relatively, affordable housing market versus the state average, Sacramento County, and the greater Bay Area. The data tracking for Solano County only started in 2010 as a stand-alone county. However, Solano County’s housing prices have closed the gap versus Sacramento County. Other areas have become less affordable more quickly; this makes Solano County an attractive place for Bay Area commuters to live given its proximity. Comparisons here are shown by county rather than metropolitan statistical area because data are reported by county.

Housing Affordability Index, 2010 Q1 to 2013 Q3, Percent of Pop that Can Afford Median Priced Home

Quarter	Solano	Sac	Calif	Sonoma	Napa	Santa Clara	Alameda	Contra Costa	Marin	San Francisco
2010.3	71%	68%	46%	40%	41%	30%	31%	21%	23%	22%
2011.3	75%	72%	52%	46%	48%	34%	36%	27%	25%	26%
2012.3	77%	73%	49%	46%	45%	32%	34%	28%	27%	25%
2013.3	56%	50%	32%	24%	28%	21%	21%	18%	18%	16%
2014.3	49%	48%	30%	29%	21%	21%	19%	19%	15%	15%

Source: California Association of Realtors (<http://www.car.org/marketdata/data/haitraditional/>)

TAKEAWAY: Solano County remains relatively less expensive as a place to live, but is seeing affordability of a home be reduced every year of housing market recovery and expansion.

WHAT IS IMPORTANT: Coupling business and worker attraction strategies in Solano County can still take advantage of relatively low home prices.

City Overview: Demography, Housing and Incomes

The 2014 Index updates information from the American Community Survey (ACS) data on Solano County's cities provided in the 2013 Index. These data compare Solano County's cities individually to the county average, California, and the United States overall. The ACS data is meant to provide updated, Census-like information between the 10-year Census dates. There are three sets of data shown below as a way to provide a further view at Solano County's communities and their progression.

Median Age in Solano County and Its Cities

Place	2000	2010	2013
Solano County	33.9	36.5	37.1
United States	35.3	36.9	37.3
California	33.3	34.9	35.4
Benicia	38.9	45.0	44.0
Dixon	31.5	32.3	34.1
Fairfield	31.1	32.8	33.0
Rio Vista	40.7	55.8	59.3
Suisun City	31.7	32.7	32.8
Vacaville	33.9	36.7	37.5
Vallejo	34.9	37.5	38.5

Source: Census Bureau (factfinder2.census.gov)

Housing and Occupancy

(How many homes are there and how many are occupied or vacant)

Place	Total Housing Units			Occupied			Vacant		
	2000	2010	2013	2000	2010	2013	2000	2010	2013
Solano County	134,513	151,616	153,180	96.9%	91.7%	92.4%	3.1%	8.3%	7.6%
United States	115,904,641	130,038,080	132,057,804	91.0%	87.8%	87.5%	9.0%	12.2%	12.5%
California	12,214,549	13,552,624	13,726,869	94.2%	91.4%	91.4%	5.8%	8.6%	8.6%
Benicia	10,547	11,905	11,433	97.9%	91.7%	93.6%	2.1%	8.3%	6.4%
Dixon	5,172	6,124	6,335	98.1%	94.2%	94.0%	1.9%	5.8%	6.0%
Fairfield	31,792	36,283	36,176	97.1%	91.7%	94.3%	2.9%	8.3%	5.7%
Rio Vista	1,974	3,592	4,023	95.3%	92.7%	89.8%	4.7%	7.3%	10.2%
Suisun City	8,146	9,291	9,123	98.0%	93.3%	95.7%	2.0%	6.7%	4.3%
Vacaville	28,696	31,780	32,491	97.9%	94.4%	94.6%	2.1%	5.6%	5.4%
Vallejo	41,219	45,297	46,125	96.1%	88.9%	88.3%	3.9%	11.1%	11.7%

Source: Census Bureau (factfinder2.census.gov)

The median age comparison shows Solano County continues to age slowly and specific cities are aging more quickly. Benicia and Rio Vista are significantly older populations than other cities in Solano County. The housing and occupancy data show that Solano County has more occupied housing than California and the US overall, and that Rio Vista and Vallejo have more vacancy than the county average and almost as much as the nation on average.

City View: Demography, Housing and Incomes (cont.)

The third set of city data shown here includes median household income (MHI), average household sizes (AHS) in terms of people per household, and also the relative education levels of residents (the percent of residents who are high school graduates and the percent of residents who have a bachelor’s degree or better). Median household income in Benicia (which looks more like the other Bay Area counties in terms of median age, income and population with a bachelor’s degree or more; this is a contrast with many of Solano County’s cities that have median income levels, household sizes and high-school diploma holders much like a mix of California and national data, but have far fewer bachelor degree holders.

Income and Education

Place	Median Household Income (2010 Dollars)			Avg. Household Size			% of Residents with HS Diploma or Better			% of Residents with Bachelor’s Degree or Better		
	2000	2010	2013	2000	2010	2013	2000	2010	2013	2000	2010	2013
Solano County	\$70,441	\$62,948	\$62,541	2.86	2.83	2.85	85.8%	86.7%	87.2%	24.0%	24.2%	24.3%
United States	\$54,680	\$50,046	\$49,348	2.59	2.61	2.63	85.0%	85.7%	86.0%	27.9%	28.5%	28.8%
California	\$61,840	\$57,664	\$56,878	2.89	2.93	2.94	80.7%	81.0%	81.2%	30.1%	30.5%	30.7%
Benicia	\$88,043	\$87,018	\$83,956	2.47	2.53	2.54	94.7%	93.8%	94.4%	41.2%	39.3%	40.7%
Dixon	\$70,927	\$69,742	\$68,797	3.11	3.00	3.11	82.1%	81.5%	80.8%	19.6%	19.3%	22.1%
Fairfield	\$66,603	\$68,009	\$61,379	3.07	3.00	3.02	84.8%	86.0%	86.4%	22.2%	23.4%	23.4%
Rio Vista	\$57,987	\$54,568	\$52,609	2.06	2.04	2.06	93.1%	93.5%	90.2%	25.3%	24.7%	22.5%
Suisun City	\$79,229	\$71,795	\$66,700	3.20	3.23	3.23	86.1%	85.6%	87.7%	19.3%	20.6%	20.4%
Vacaville	\$75,087	\$70,838	\$69,803	2.76	2.71	2.75	85.4%	86.8%	87.4%	21.0%	21.7%	22.2%
Vallejo	\$65,143	\$61,481	\$55,373	2.85	2.85	2.84	84.7%	86.1%	86.4%	24.7%	24.2%	23.3%

Source: Census Bureau (factfinder2.census.gov)

TAKEAWAY: Solano County has a more affluent populace than California and the nation overall, but some of Solano County’s cities remain behind in number of bachelor’s degree holders versus the state and nation.

WHAT IS IMPORTANT: Solano’s cities, as places to live, provide a local workforce. Workforce development should watch these data to determine the types of assistance that may be needed and the evolution of city workers and households.

Data Sources and Methodology

Solano County Key Facts

Area

Data provided by the Solano Economic Development Corporation (EDC).

Population

Data are from the E-1: City/County Population Estimates with Annual Percent Change report by the California Department of Finance and for Solano County. Estimates are for July 1, 2014.

Jobs

Solano County employment data are provided by the California Employment Development Department, Current Employment Statistics (CES). The industry data may include employees who live outside the county. December 2013 data is preliminary.

Foreign Immigration and Domestic Immigration

Data are from the E-6: Population Estimates and Components of Change by County - July 1, 2010-2014 report by the California Department of Finance and are for Solano County, the Bay Area otherwise (including Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara Counties), the North Bay (Napa and Sonoma counties), and for California overall.

Estimates for 2014 are provisional. Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad, and the balance of hundreds of thousands of people moving to and from California from within the United States.

Adult Educational Attainment, Age Distribution, and Ethnic Composition

Data provided by the U.S. Census Bureau, American Community Survey in 2014 is an average of data over the years of 2009 to 2013 for Solano County.

Economy: Our Changing Economy

Annual Employment

Solano County employment data are provided by the California Employment Development Department Current Employment Statistics (CES). The industry data reflects the

number of jobs in the county that may pay employees who live outside of the county.

Change in Annual Jobs

Solano County employment data provided by the California Employment Development Department Current Employment Statistics (CES), the industry data reflect the number of jobs in the county that may pay employees who live outside of the county. The data are as of December 2014 and are estimates.

Total Employed Residents & Total Unemployed Residents

Solano County resident employment data is provided by the California Employment Development Department (EDD) Local Area Unemployment Statistics (LAUS). The data reflects the number of residents employed and unemployed in the county. Monthly data reports for Solano County and selected areas originate at the Bureau of Labor Statistics (www.bls.gov) and EDD reports the estimates.

Non-employer Firm Growth & Percentage of Non-employers by Industry

Data for Non-employers is from the U.S. Census Bureau. Non-employer statistics originate from tax return information of the Internal Revenue Service. The data are subject to tax forms data, as well as errors of response, non-reporting and coverage. Values provided by each firm are slightly modified to protect the respondent's confidentiality.

Median Household Income

Data for Median Household Income are from the 2007-2013 American Community Survey data reports from the U.S. Census Bureau, including the decennial Census in 2010. All income values are inflation-adjusted and reported in 2010 dollars, using the California CPI from the California Department of Finance. This California CPI is a weighted average of consumer price index (CPI) the Bureau of Labor Statistics (BLS) reports for the San Francisco, Los Angeles, and San Diego metropolitan areas.

Real per Capita Income

Total personal income and population data are from the Bureau of Economic Analysis (www.bea.gov). Income values are inflation-adjusted and reported in 2010 dollars, using the California CPI from the California Department of Finance.

Sources of Personal Income

Data are provided by the Bureau of Economic Analysis (BEA). Data are from Personal Income by Major Source and Earnings by NAICS Industry (CA05N). Personal income has been adjusted into 2010 dollars using either the California CPI from the California Department of Finance or the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics, when the data are national.

Economic Base and Locally-Serving Industries: Moving Solano Forward

These data come from the Quarterly Census of Employment and Wages (QCEW) which allows for a look at employment, wages, and establishments data at the NAICS-4 digit level. The North American Industry Classification System (NAICS) allows for a drill down below the major industry sector. Wages have been adjusted into 2010 dollars using either the California CPI from the California Department of Finance or the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics, when the data are national.

County Revenue and Assessed Property Value

Data for sales tax revenue are from the State of California Board of Equalization and the Solano County Department of Finance. Data on the assessed value of residential properties is from the Solano County Assessor's office.

Community: Our Changing Community

Population Growth & Domestic and Foreign Migration

Data are from the E-6: Population Estimates and Components of Change by County - July 1, 2000-2014 report by the California Department of Finance and are for Solano County, the Bay Area otherwise (including Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara and counties), the North Bay (Napa and Sonoma counties) and California overall. Estimates for 2010 are provisional. Net migration includes all legal and unauthorized foreign immigrants, residents who left the state to live abroad, and the balance of hundreds of thousands of people moving to and from California from within the United States.

For the population pyramids, the data used comes from the California Department of Finance, P-3 report (State and County Population Projections by Race/Ethnicity, Detailed Age, and Gender, 2010-2060 (by year)).

Dependency Ratios

Data for the dependency ratios, which are the percentage of the population that is either under 18 years of age or over 65 years of age, come from the American Community Survey from the U.S. Census Bureau, including the decennial Census in 2010, covering years between 2005 and 2013.

High School Dropout Rates

Data for the 2012/2013 academic year are provided by the California Department of Education Educational Demographics Office. The 4-year derived dropout rate is an estimate of the percent of students who would drop out in a four-year period based on data collected for a single year.

High School Graduation Rate and Percentage that Meet UC/CSU Entrance Requirements

Data for the 2012/2013 academic year are provided by the California Department of Education. There has been a recent change in methodology such that time periods before 2009 are not comparable to those after 2009. In theory, the methodology used calculates an approximate probability that one will graduate on time by looking at the number of 12th grade graduates and number of 12th, 11th, 10th and 9th grade dropouts over a four year period. The adjusted dropout numbers were used which accounts for students who dropout and re-enroll, and lost transfer students.

Health Insurance Coverage

Data for health insurance coverage comes from the Census Bureau's Small Area Health Insurance Estimates www.census.gov/did/www/sahie/

Residential Foreclosure Activity

Data here come from DataQuick News. Data reflects total foreclosures for townhomes, condominiums and single family homes. The foreclosure numbers are strictly recorded Trustee's Deeds, or when the property is actually taken back by the bank. 2014 data is through Q3 2014, and estimated for 2014 Q4.

Trends in Home Sales

Data provided by RAND California Statistics and sourced by DataQuick News. For average sale price and number of transactions, all homes (including condos/townhomes) were included in calculations. Sales price are inflation-adjusted and reported in 2010 dollars, using the U.S. City Average Consumer Price Index (CPI) of all urban consumers, published by the U.S. Bureau of Labor Statistics.

2007 NAICS Industry Cluster Definitions

Advanced Food and Beverage Manufacturing

1112 Vegetable and Melon Farming
 1113 Fruit and Tree Nut Farming
 1114 Greenhouse, Nursery, and Floriculture Production
 1119 Other Crop Farming
 1121 Cattle Ranching and Farming
 1124 Sheep and Goat Farming
 1129 Other Animal Production
 1151 Support Activities for Crop Production
 1152 Support Activities for Animal Production
 3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing
 3116 Animal Slaughtering and Processing
 3118 Bakeries and Tortilla Manufacturing
 3121 Beverage Manufacturing

Construction

5413 Architectural, Engineering, and Related Services (Federal Government)
 2361 Residential Building Construction
 2362 Nonresidential Building Construction
 2371 Utility System Construction
 2373 Highway, Street, and Bridge Construction
 2381 Foundation, Structure, and Building Exterior Contractors
 2382 Building Equipment Contractors
 2383 Building Finishing Contractors
 2389 Other Specialty Trade Contractors
 541310 Architectural Services
 541320 Landscape Architectural Services
 541330 Engineering Services
 541350 Building Inspection Services
 541370 Surveying and Mapping (except Geophysical) Services

Health and Social Services

6222 Psychiatric and Substance Abuse Hospitals (State Government)
 6211 Offices of Physicians
 6212 Offices of Dentists
 6213 Offices of Other Health Practitioners
 6214 Outpatient Care Centers
 6216 Home Health Care Services
 6231 Nursing Care Facilities
 6232 Residential Mental Retardation, Mental Health and Substance Abuse Facilities
 6233 Community Care Facilities for the Elderly
 6239 Other Residential Care Facilities
 6241 Individual and Family Services
 6243 Vocational Rehabilitation Services
 6244 Child Day Care Services

Life Sciences (Pharmaceuticals, Medical Devices, Biotechnology)

3254 Pharmaceutical and Medicine Manufacturing
 3391 Medical Equipment and Supplies Manufacturing
 54171 Research and Development in the Physical, Engineering, and Life Sciences
 541380 Testing Laboratories
 811219 Other Electronic and Precision Equipment Repair and Maintenance

Professional and Environmental Services

3231 Printing and Related Support Activities
 5241 Insurance Carriers
 5242 Agencies, Brokerages, and Other Insurance, Related Activities
 5311 Lessors of Real Estate
 5312 Offices of Real Estate Agents and Brokers
 5313 Activities Related to Real Estate
 5411 Legal Services
 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
 5414 Specialized Design Services
 5415 Computer Systems Design and Related Services
 54172 Research and Development in the Social Sciences and Humanities
 5418 Advertising and Related Services
 5511 Management of Companies and Enterprises
 5611 Office Administrative Services
 5613 Employment Services
 5616 Investigation and Security Services
 5617 Services to Buildings and Dwellings
 5619 Other Support Services
 6115 Technical and Trade Schools
 541620 Environmental Consulting Services
 813312 Environment, Conservation, and Wildlife Organizations
 9241 Administration of Environmental Quality Programs (Federal Government)
 9241 Administration of Environmental Quality Programs (State Government)
 9241 Administration of Environmental Quality Programs (Local Government)

Specialized Manufacturing

2131 Support Activities for Mining
3252 Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3256 Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3272 Glass and Glass Product Manufacturing
3273 Cement and Concrete Product Manufacturing
3323 Architectural and Structural Metals Manufacturing
3324 Boiler, Tank, and Shipping Container Manufacturing
3326 Spring and Wire Product Manufacturing
3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
3328 Coating, Engraving, Heat Treating, and Allied Activities
3329 Other Fabricated Metal Product Manufacturing
3331 Agriculture, Construction, and Mining Machinery Manufacturing
3332 Industrial Machinery Manufacturing
3339 Other General Purpose Machinery Manufacturing
3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3399 Other Miscellaneous Manufacturing
8113 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance

Trade and Logistics

4231 Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers
4232 Furniture and Home Furnishing Merchant Wholesalers
4233 Lumber and Other Construction Materials Merchant Wholesalers
4234 Professional and Commercial Equipment and Supplies Merchant Wholesalers
4237 Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers
4238 Machinery, Equipment, and Supplies Merchant Wholesalers
4239 Misc. Durable Goods Merchant Wholesalers
4241 Paper and Paper Product Merchant Wholesalers
4243 Apparel, Piece Goods, and Notions Merchant Wholesalers
4244 Grocery /Related Product Merchant Wholesalers
4246 Chemical and Allied Products Merchant Wholesalers
4247 Petroleum and Petroleum Products Merchant Wholesalers
4251 Wholesale Electronic Markets and Agents and Brokers
4841 General Freight Trucking
4842 Specialized Freight Trucking
4883 Support Activities for Water Transportation
4884 Support Activities for Road Transportation
4889 Other Support Activities for Transportation
4921 Couriers
4931 Warehousing and Storage
424910 Farm Supplies Merchant Wholesalers
424990 Other Miscellaneous Nondurable Goods Merchant Wholesalers

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The 2014 Solano County Index of Economic and
Community Progress can be found at:

www.solanocounty.com/economicindex

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