

2019 REAL ESTATE FORECAST



THE FUTURE IS NOW



THE OPPORTUNITIES



When buying, leasing or selling property, our guidance throughout the process includes benefit analysis, tax planning, financial consulting and negotiations.

Qualified Opportunity Zones are the best incentive we've seen in years, if ever. The longer the investment, the bigger the benefit, so move fast to take advantage. Call or email us for more information on OZs.

Sign up for our bi-weekly newsletter and check out our blog at whhcas.com

CONTACT US

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Fresno, California 93711



REAL ESTATE

CONSTRUCTION

AGRICULTURE

ARE ENDLESS



Opportunity Zones



Agriculture



Manufacturing



Buy/Sell Decisions



Asset Allocation Analysis



Tax Deferred Exchanges



Entity Selection



Property Tax Consulting



Common Area Accounting



Acquisition and Disposition
of Real Estate



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LEE ANN EAGER



The theme “The Future is Now” was selected because we continually look to the past to predict where we are going in the future. Real estate trends have traditionally followed a pattern. From boom to bust—we here in the Central Valley have been able to see where we are headed based on where the rest of the state has been.

Everyone is on the lookout for signs of the next recession as the state’s economy nears its 10th year of recovery and expansion. Fresno County and the Central Valley have had a much shorter recovery time period. We are still on the upswing and are looking forward to a few more years of prosperity before we start scaling back. The signs continue to point to a stable market here in the valley.

At the Fresno County Economic Development Corporation, we have seen more interest in our region than ever before. From Retail to Industrial to Commercial real estate, our leads have doubled over the past few months. The EDC staff has been extremely busy responding to requests from site selectors, brokers, business owners, municipalities, and developers from around the world. Global interest in Fresno County has increased dramatically during the past year, and we do not see that trend subsiding.

One of the trends we will certainly be paying close attention to in 2019, is the interest in Opportunity Zones. Opportunity Zones offer a new and exciting investment vehicle in areas of the country that need those investments the most. Fresno County has 47 zones available, and the EDC will be marketing those areas to interested parties across the country.

As we look back over the past 10 years, the Fresno County Economic Development Corporation has experienced exceptional growth. That growth mirrors what has happened in our region during that same time. Unemployment rates are at an all-time low, while interest in Fresno County from prospects around the world is at an all-time high. All of this points to what we already know—Fresno County is the premier location to do business.

**LOOKING FORWARD,
WE EXPECT THE POSITIVE
TRENDS TO CONTINUE.
THE FRESNO COUNTY EDC
IS GEARED UP AND READY
TO HELP GROW
THE CALIFORNIA DREAM
RIGHT HERE IN FRESNO COUNTY...
THE FUTURE IS NOW!**

► **LEE ANN EAGER**
FRESNO COUNTY EDC
PRESIDENT & CEO





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Levee/Stream Bank Stabilization

Well Design and Rehabilitation

Groundwater Recharge/Banking

Water Exchanges/Transfers/Water Rights

Water/Energy Rate Evaluations

Indirect Source Review

Landscape Architecture





Thank you for being a part of this year's annual Real Estate Forecast. The Forecast is celebrating its 16th birthday, and continues to be the largest and most well attended event of its kind in Fresno County. I am especially excited for this year's event as we have done a complete reboot of the format.

As in past years, you will hear from experts in Single Family, Multifamily, Agriculture, Retail, Office and Industrial with a special presentation on Opportunity Zones. The Forecast 2.0 is transitioning from powerpoint style individual presentations to a question and answer dialogue between the moderator, yours truly, and the experts both individually as well as in groups. Our goal with the format change is to tie the content together which will create a more interactive environment for the panelists and a more entertaining and informative experience for the audience. We sincerely hope you enjoy the show.

The real estate market finished another strong year in 2018, over 8 years of consecutive growth. This prolonged "bull" market has many people in the industry wondering when the proverbial "music will stop." The fourth quarter 2018 and the first quarter 2019 saw a slowdown in overall market velocity. Buyers and tenants began to show signs of resistance to rising costs, making transactions harder to close.

Statistically speaking however, it is difficult to identify any areas within the market that demonstrate a decline, nor do we predict any significant decline any time soon.

In fact, statistics show the exact opposite: tight inventory, high prices, and manageable demand remain the trends of the day. There seems to be a sentimental resistance from users that is affecting the market. I believe that sentimental slowdown will result in pent up demand from users leading to a return of market velocity and a solid finish to 2019.

*This year's event theme "The Future is Now" is a message to the industry to not rely on successes of the past waiting for an imaginary turn in the cycle, but to be **bold, innovative, and adaptive**. The market statistics are strong, **the economy is stable**, and there are no signs of a bubble. This real estate cycle will eventually turn, but for now has strong legs that will run for the next several years.*

Nick Audino

► **NICK AUDINO**
FRESNO COUNTY EDC
CHAIRMAN OF THE BOARD



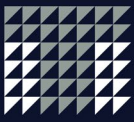


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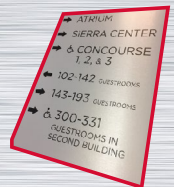


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STREET NAME SIGNS

VEHICLE MAGNETS

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REAL ESTATE FRAMES

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CUSTOM DESIGNS



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STK-02B



DSF04BLK



DSF02BLK



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AFR-01B



140-B



155-W



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NICO GENTILE

Owner/Broker

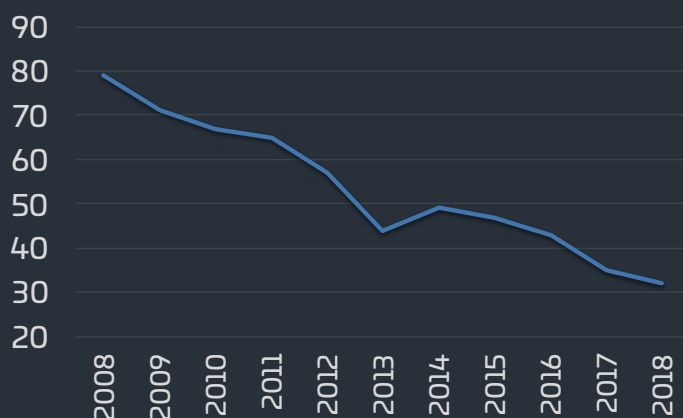
GENTILE REAL ESTATE

Nico is the Owner/Broker of Gentile Real Estate. He specializes in Luxury Homes in the Central Valley as well as Single Family Residential Properties. With national and international residential accreditations, his knowledge, experience, and expertise in meeting the needs of affluent buyers and sellers in the upper tier markets has resulted in consecutively earned multi-million-dollar production.

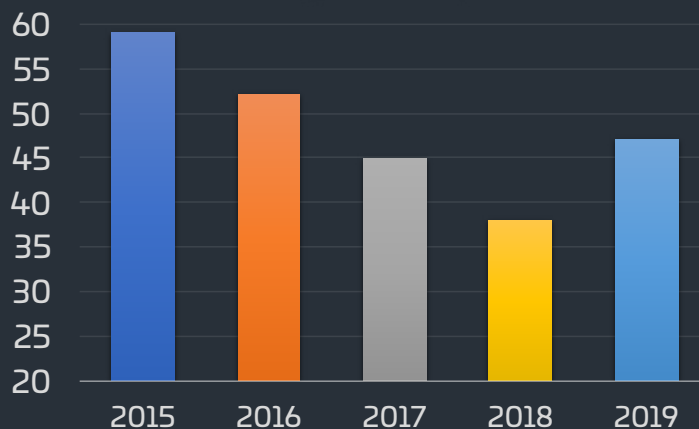
Nico recently earned The Institute for Luxury Home Marketing's Million Dollar GUILD™ recognition in million-dollar and above residential properties. He earned the designation, Certified Luxury Home Marketing Specialist™, an exclusive group who completed The Institute's training with a proven performance in the upper-tier market. The training and ongoing membership with The Institute provide Nico with the knowledge and tools to better serve any and all buyers, sellers and investors with real estate needs.

Nico is also diversified in farming, establishing Gentile Farms LLC and GSW Farms LLC in 2016. Farming almonds and peaches is what Nico enjoys doing in his free time.

DAYS ON MARKET (DOM) VS. YEAR



DOM JANUARY - FEBRUARY VS. YEAR



VALUES TO DECREASE

AS THE COST OF BORROWING MONEY INCREASES AND SUPPLY COMING TO MARKET INCREASES

INTEREST RATES TO RISE TOWARDS

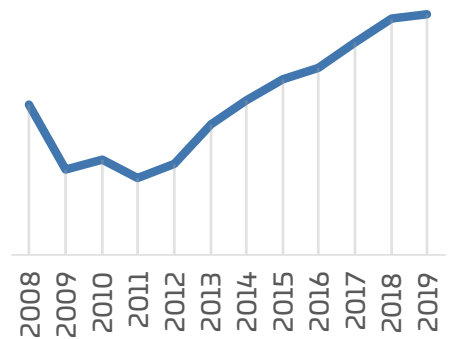
5%

WITH A YEAR END HIGH OF LOW 5%

2019 FORECAST

\$350,000
\$300,000
\$250,000
\$200,000
\$150,000
\$100,000

AVERAGE HOME PRICE VS. YEAR



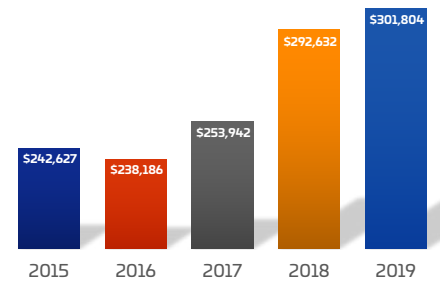
LARGE METROPOLITAN AREAS

OF THE US SAW UP TO 6% DECREASE IN HOME PRICES AT THE END OF 2018

CURRENT AVERAGE HOME PRICE

\$298,731 IN 2018 COMPARED TO \$278,447 IN 2017

AVERAGE HOME PRICE JAN - FEB VS. YEAR



TOTAL DOLLAR VALUE OF SOLD HOMES

UP \$101,277,163 FROM 2017 TO 2018

DAYS ON MARKET HAS INCREASED

FROM 38 IN THE FIRST TWO MONTHS OF 2018 TO 47 IN THE FIRST TWO MONTHS OF 2019

2-3 MONTHS OF SUPPLY CURRENTLY ON THE MARKET



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Wells Fargo is proud to support the Fresno County Economic Development Corporation 2019 Real Estate Forecast event.

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by your success**

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VALLEY APPRENTICESHIP CONNECTIONS (VAC)

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Summer Internship Program

**URBAN SOUTH YOUTH PROGRAM
EMPLOYMENT & TRAINING**

4-H Charter & Summer Youth Programs

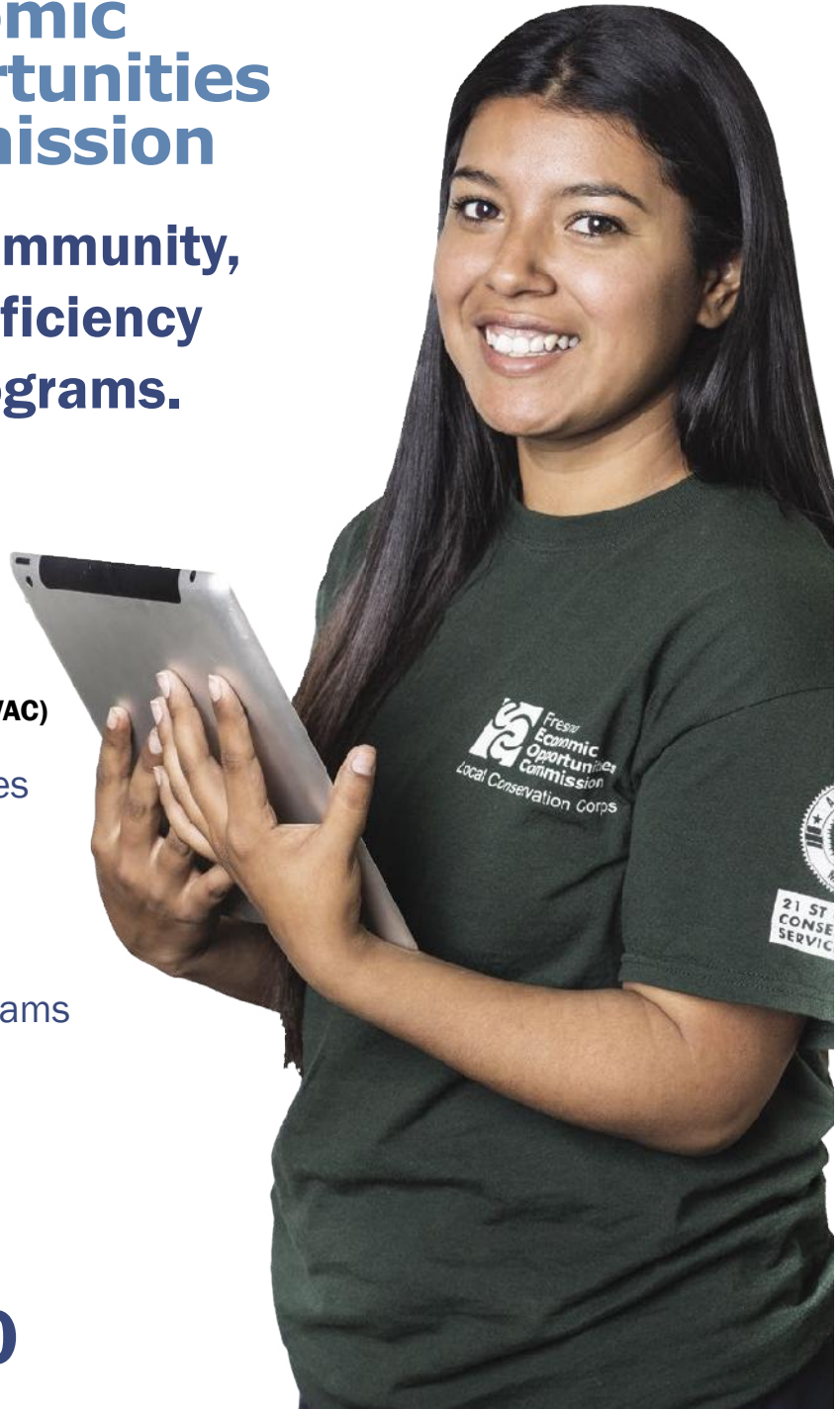
Gang Prevention

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**For a complete list of Fresno EOC programs visit:
www.FresnoEOC.org/programs**



ROBERT L. WIEBE, CPA
Partner
WIEBE HINTON HAMBALK, LLP

Robert's work in public accounting launched in 1978 when he became a tax partner and strong real estate specialist. His command of complex like-kind exchanges made him a respected authority in this highly technical specialty.

Robert keeps up-to-date nationally on emerging real estate and tax planning opportunities as both a speaker and a student. General practice specialties include partnership reorganizations, income and estate tax planning, business consulting, and litigation support.

Robert has quickly become an authority on the implementation and structure of the new Qualified Opportunity Zones. He considers them the best economic incentive he's seen for Fresno County and an unparalleled opportunity for investors. His unique talent is in structuring deals to maximize benefit and QOZs are a valuable path to achieve this.

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QUALIFIED OPPORTUNITY

STEP | ONE \$100K

in capital gains
from
previous sale

STEP | TWO



SOLD FOR: \$410K
\$200K APPRECIATION

TOTAL: \$210K INVESTMENT

STEP | THREE A.

No Opportunity Zone

FEDERAL TAX ON CAPITAL GAIN: \$100K X 20% = \$20K

FEDERAL TAX ON APPRECIATION: \$200K X 20% = \$40K

TOTAL TAX: 20% or \$60K

STEP | THREE B.

Opportunity Zone

FEDERAL TAX ON CAPITAL GAIN: \$100K X 85% X 20% = \$17K

FEDERAL TAX ON APPRECIATION: 0% X \$200K = \$0

TOTAL TAX: 8.5% or \$17K

Sample Ownership Structure



2019 FORCAST

TYPES OF REAL ESTATE WHICH
QUALIFY FOR OZ'S



ELIGIBLE GAINS

- FARMLAND
- HOUSING
 - MULTI-FAMILY
 - APARTMENTS
- COMMERCIAL
 - RETAIL BUILDINGS
 - OFFICE COMPLEXES
- INDUSTRIAL SPACES
- HOTELS AND HOSPITALITY
- BUSINESSES
 - RESTAURANT
 - FAMILY OWNED
- MIXED-USE

- CAPITAL GAINS
- CAN BE SHORT TERM HOLDING PERIOD
- NOT ORDINARY GAINS FROM INVENTORY PROPERTY
- NOT ORDINARY LIKE A 1245 DEPRECIATION RECAPTURE
- NOT FROM A SALE TO A RELATED PARTY



CLIENTS WILL
USE OZ
INSTEAD OF
TAX DEFERRED
EXCHANGES (1031)



PROPERTY
SPECIFIC
**FOCUS IN
ZONES**



CHANGING
**DEBT TO
EQUITY %**
IN PROPERTY

BY THE NUMBERS

180
DAYS
to make an investment
into an OZ fund

90%
OF FUND ASSET
must be in the OZ

10
YEARS OF
tax capital gain deferral

SEE PAGE 37
FOR FRESNO COUNTY
OPPORTUNITIES ZONES





ETHAN SMITH, SIOR, CCIM
Senior Vice President
 NEWMARK PEARSON COMMERCIAL



Ethan H. Smith, SIOR, CCIM began his commercial real estate career in 2003. He is a Senior Vice President at Newmark Pearson Commercial specializing in industrial properties.

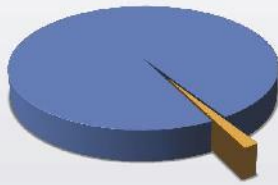
In 1994, Ethan graduated from the University of Texas at Austin, and began his career in sales with E & J Gallo Winery where he sold multiple product lines and introduced numerous new products to a variety of retail channels. In 1996, Ethan transitioned to advertising at DDB Worldwide (the largest global marketing communications firm) where he was accountable for and managed the Agency's multi-million dollar relationships with clients, including American Airlines, Interstate Batteries, Pepsi, and Frito-Lay. While at DDB, Ethan focused on integrated sales promotions as well as relationship marketing. Leaving Dallas in 1999, he helped start PeoplePC in San Francisco where he was responsible for customer marketing programs in addition to being part of the founding management team. Ethan oversaw the growth of the marketing department from two to forty people and the expansion of the company into Europe and Asia. In 2001, Ethan moved to iPrint Technologies where he was responsible for the acquisition and retention marketing programs.

Ethan has a wide variety of marketing experiences from which to draw as an Industrial Specialist at Newmark Pearson Commercial to better serve his clients.

VACANCY RATE

Area	Total SF	Vacant SF	Vacancy Rate
Northwest	8,753,289	207,765	2.40%
Northeast	13,522,384	91,012	0.70%
Southwest	8,264,155	177,657	2.10%
Southeast	30,553,849	489,229	1.60%
S Fresno/ 99 corridor	6,106,403	106,880	1.80%
	67,200,080	1,072,543	

Building Type	Total SF	Vacant SF	Vacancy Rate
General Industrial	27,674,422	288,421	1.04%
R&D/Flex	967,818	35,986	3.72%
Warehouse/ Distribution	38,557,840	748,136	7.94%

2019
FORECAST

**HISTORICALLY
LOW VACANCY RATE
FOR FRESNO AREA
1.6%**



**CONSTRUCTION
COSTS
LAST 12 MONTHS
INCREASED 5%**



**AVERAGE ASKING RENT
\$0.45/SF NNN
INCREASE
OF \$0.02/SF
YEAR-OVER-YEAR**

**NATIONALLY
NEW CONSTRUCTION
UP**

**OVER 250M SF
OF SPACE
DELIVERED IN 2018**

**ENTITLEMENT
COSTS
UP**

**UNCERTAINTY
UP**

**LEASE RATES AND
SALES PRICES
FLAT**

**CONSTRUCTION COSTS
FORECAST FOR NEXT
12 MONTHS
FLAT**

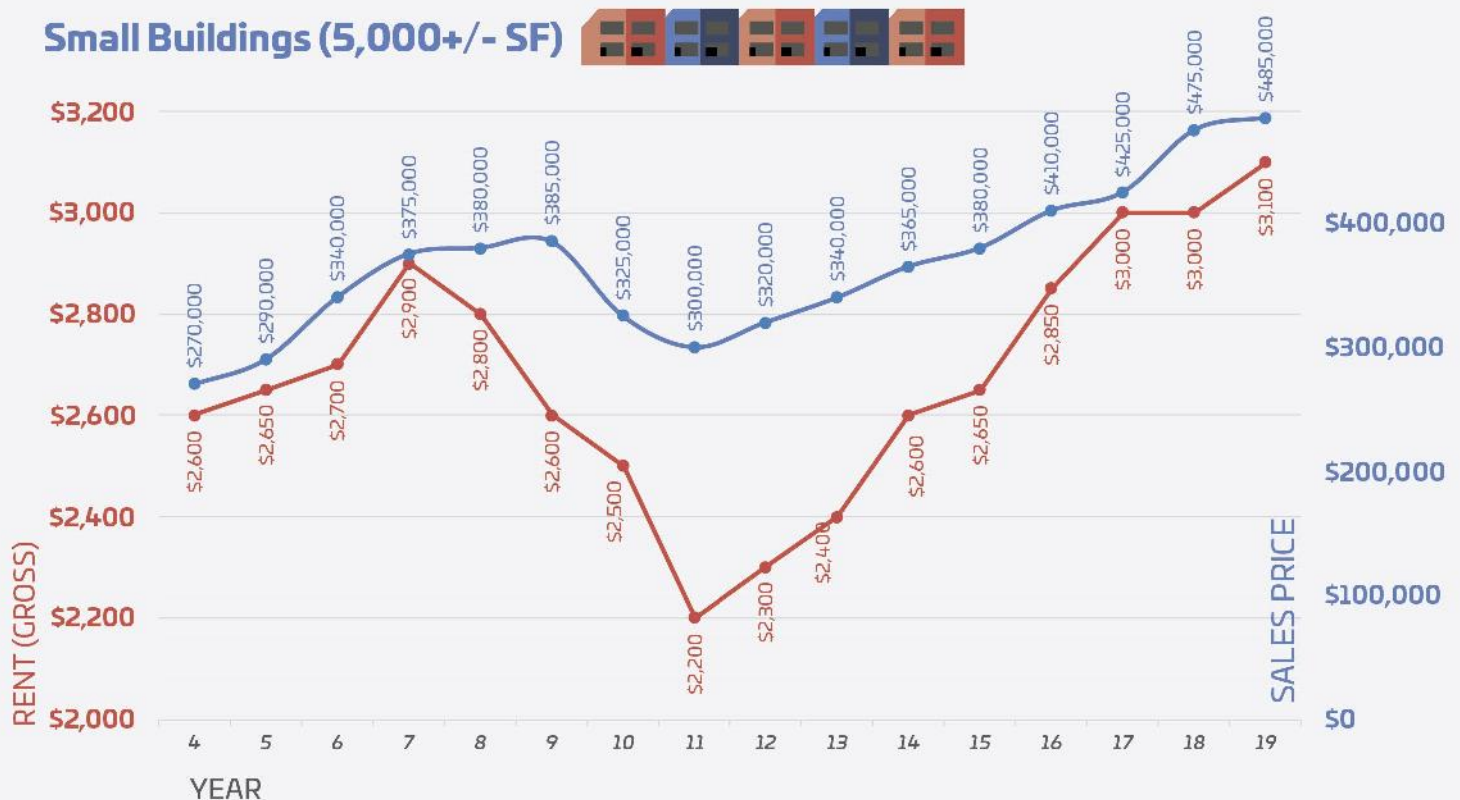
**LOCALLY
NEW CONSTRUCTION
DOWN**

↓ **IN 2018
Less than 600,000 SF**

↓ **TO DATE FOR 2019
LESS THAN 300,000 SF**

LOCAL LAND COSTS STABILIZED \$4/SF TO \$7/SF

Small Buildings (5,000+/- SF)





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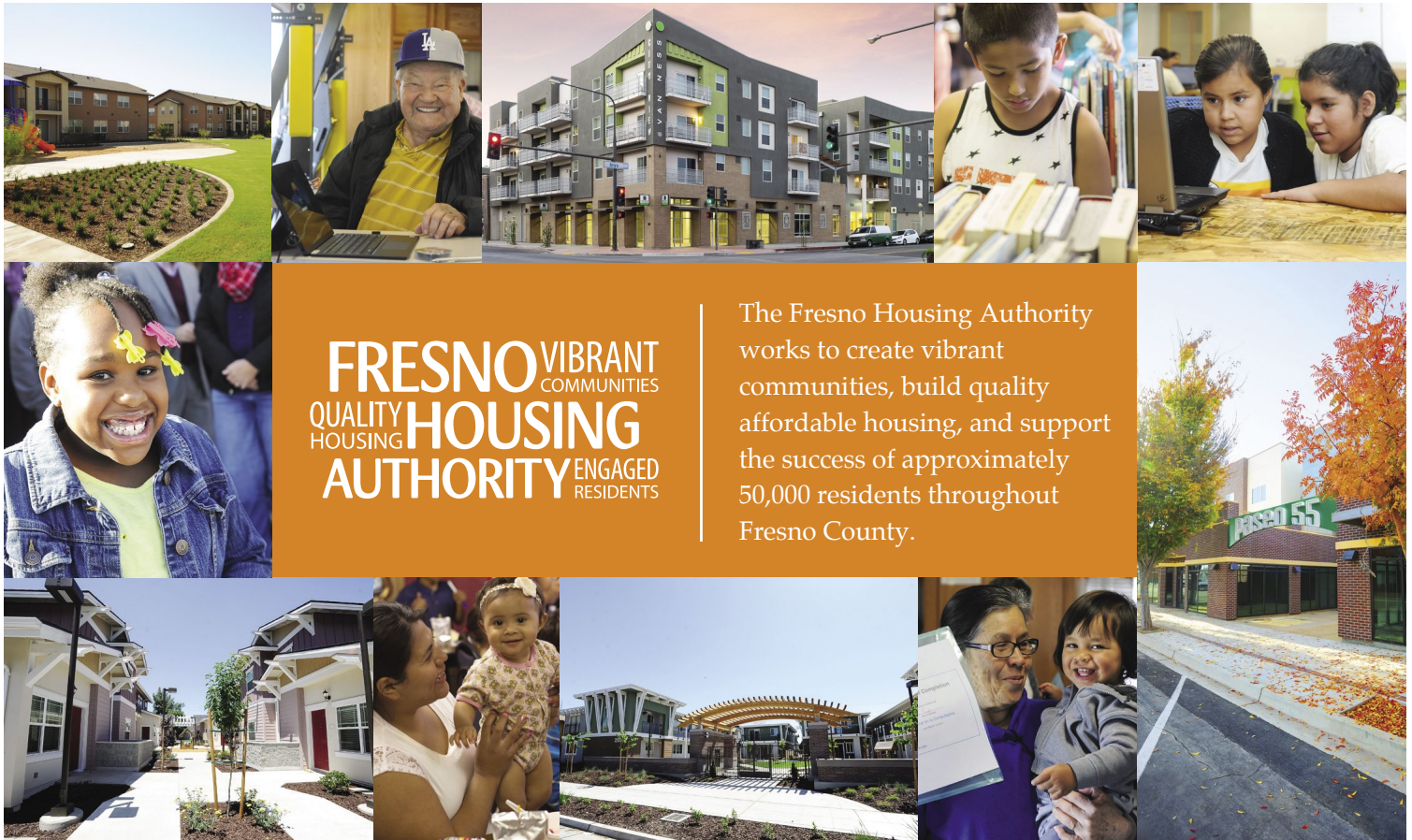


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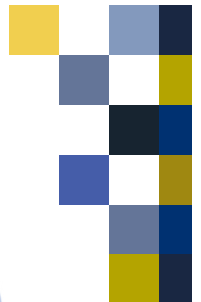
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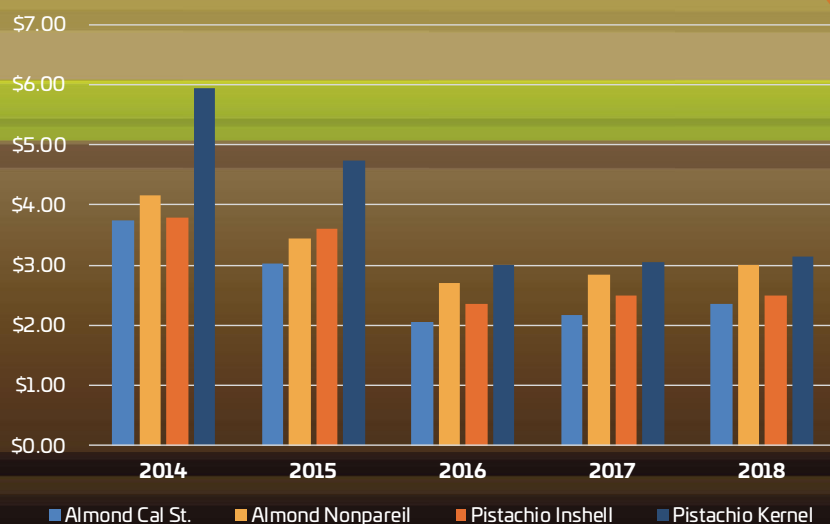
SULLIVAN GROSZ
PEARSON REALTY



sgrosz@pearsonrealty.com

Sullivan is a Bulldog fan with a Mustang heart. He grew up near Kerman, graduated from San Joaquin Memorial, earned All-American honors for football at Cal Poly, and had a split-second career in the NFL. After limping home he jumped back into agriculture, pursuing farm real estate with Pearson Realty in 2016. Since then he has contracted over 1,600 acres of irrigated farmland and \$48 million in listings. Sullivan is a graduate of the Almond Board of California's Leadership program and currently sits on the Biomass Working Group. You can find him involved in many other community groups, anywhere from Rotary, to Young Farmers & Ranchers, and even Fresno Ducks Unlimited. When asked if he prefers the beach or mountains, he says "mountains, as long as I can hike to the top or ski to the bottom."

ALMOND & PISTACHIO HISTORICAL AVG. \$/LB



2017 Rank

TOP 4 CROPS VALUE 2017

2016 Rank

2007 Rank

1



Almonds
\$1,220,082,000

1

2

2



Grapes
\$951,231,000

2

1

3



Poultry*
\$605,610,000

3

4

4



Pistachios
\$517,043,000

7

18

All information provided by Fresno County Department of Ag.
*Includes turkey, chickens, ducks, geese, gamebirds & eggs

SGMA Sustainable Groundwater Management Act

- **PASSED BY GOVERNOR BROWN IN 2014**, EFFECTIVE JANUARY 1, 2015
 - SB 1168, SB1319, AND AB 1739
- **GSA (Groundwater Sustainability Agency)** FORMED BY JULY 1, 2017
 - 19 GSAS IN FRESNO COUNTY
- **GSP (Groundwater Sustainability Plan)** SUBMITTED BY JANUARY 31, 2020
 - GSPS EVALUATED EVERY 5 YEARS UNTIL 2040
 - "SUSTAINABILITY" BY 2040 AND BEYOND

2019 FORECAST



**THERE WILL BE
TREMENDOUS
GROWTH
IN SPECIALTY
MARKETS**

LIKE HEMP,
PISTACHIO,
AND ORGANICS



**FARMS WITH
ONE SOURCE
OF WATER
WILL CONTINUE TO
DECREASE IN VALUE**



**PISTACHIO AND ALMOND
PRICES WILL
HOLD STABLE**



**2018 ALMOND CROP
HIT A RECORD OF
2.27 MILLION LBS
AND EXPECTED
TO EXCEED
3 BILLION LBS
BY 2023**

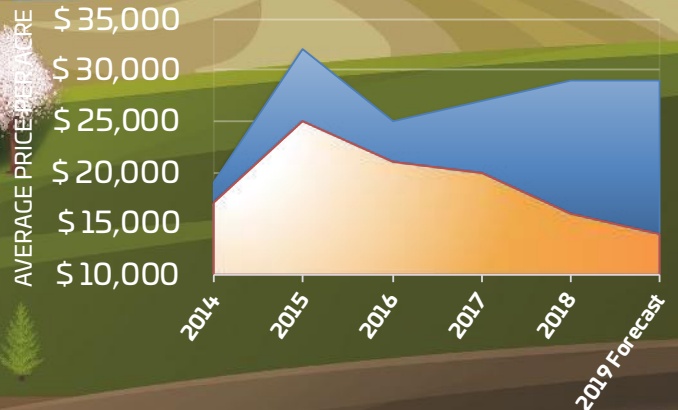
**PISTACHIO
TREES**

START PRODUCING
AFTER 6 YEARS
AND DON'T HIT FULL
MATURITY UNTIL THEIR
10TH YEAR

FRESNO IRRIGATION DISTRICT VS. GROUNDWATER ONLY

(Good soils and open land)

■ FID & Groundwater ■ Groundwater ONLY



**FRESNO COUNTY
COMMERCIALLY
GROWS OVER 350
DIFFERENT CROPS**



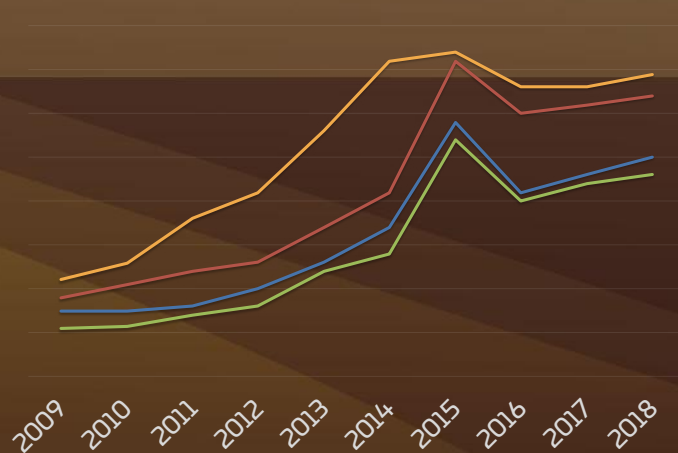
LAND VALUES

IN A GOOD IRRIGATION
DISTRICT WITH SUFFICIENT
GROUNDWATER
ARE FLAT

PRICE PER ACRE
\$45,000
\$40,000
\$35,000
\$30,000
\$25,000
\$20,000
\$15,000
\$10,000
\$5,000

FARM LAND VALUES

(avg. price with good soil, water, and crop production history)



**36% OF
IRRIGATED
FARMLAND
IN THE CENTRAL VALLEY
IS IN DANGER
OF RETIRING
DUE TO SGMA**



— thompson (raisin) grapes
— almonds
— cropland
— pistachio



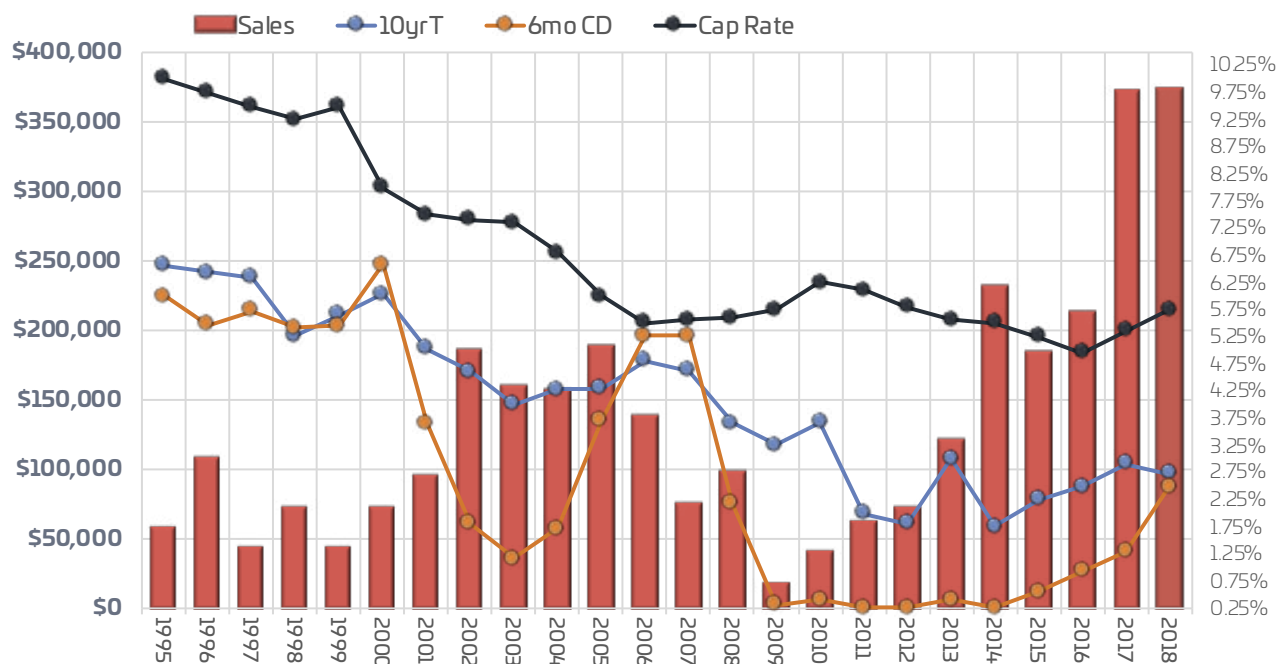
ROBIN KANE
Senior Vice President
THE MOGHAREBI GROUP



Robin C. Kane is dedicated to the multifamily sector, investing his time in managing transactions or analyzing local market conditions for both local and national owners, investors, and lenders. He and his team have been the dominant brokers in the Central Valley, second only to The Mogharebi Group (TMG). By joining TMG, together, the market share is more than double the rest of the field combined! Prior to joining TMG, Robin was Senior Director with Berkadia Real Estate Advisors, a national sales and lending firm. For over 35 years, he has sold close to \$2 Billion in sales representing over 10,000 Units. In addition, he has closed close to \$200 Million in Office and Retail for several HNW clients.

FRESNO MSA APARTMENT SALES 1995-2018

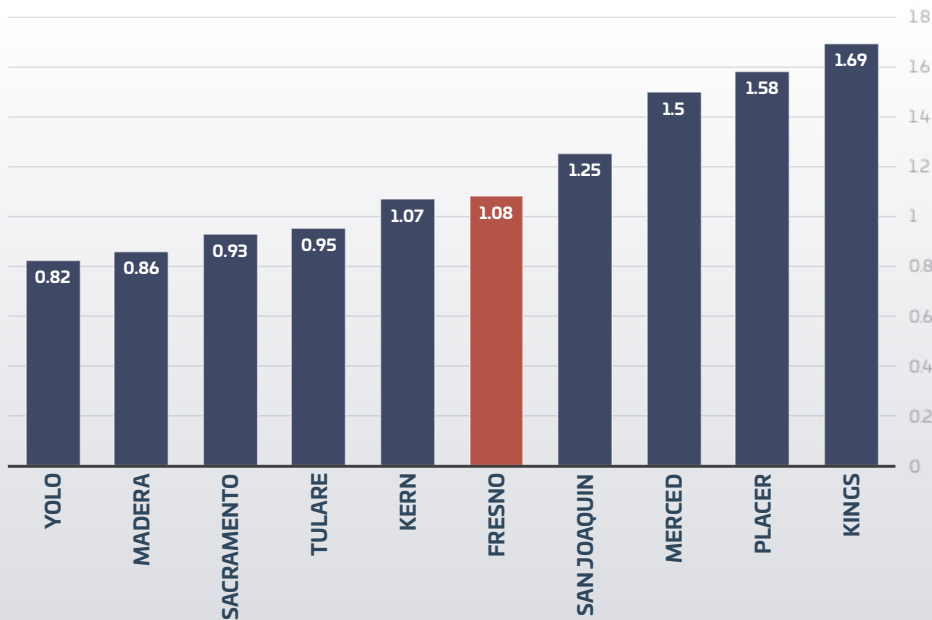
(W/ 10Y, 6MO CD & CAP RATES*)



* Cap Rates: Western US Major Markets

Source: Axiometrics, YardiMatrix, Federal Reserve

POPULATION GROWTH RATE



2019 FORECAST



THE EXODUS OF
**COASTAL
RESIDENTS
TO FRESNO**
WILL BE THE FUEL
FOR GROWTH
FOR YEARS TO COME



THE RISE IN
INTEREST RATES
WILL BE GOOD NEWS FOR
APARTMENT OWNERS



**NEW MF
CONSTRUCTION**
WILL PULL RENTS UP
FOR THE ENTIRE
MARKET WHICH WILL
JUMPSTART **MAJOR
RENOVATIONS**
OF EXISTING UNITS

CLOSE TO
**2,400
UNITS**
IN THE
DEVELOPMENT
PIPELINE

11 OF THE TOP 20
RENT GROWTH
MARKETS ARE
**IN THE
CENTRAL
VALLEY**

HIGHEST
IN OVER
**30
YEARS!**

2018 FRESNO MSA
APARTMENT SALES
**EXCEED 2017
RECORD BREAKING
YEAR WITH
\$373M+**





RACHAEL ORLANDO

RETAIL CALIFORNIA

Rachael Orlando is a Commercial Real Estate agent with Retail California. Along with providing in-depth market knowledge and insight for her clients, Rachael works closely with many landlords and city officials throughout the Central Valley. Rachael has been responsible for the placement and strategic rollout for many regional and national retailers from the Central Valley to the Bay Area. Through her experience of constructing and operating her own business, she has extensive knowledge of business startup, including lease negotiation, tenant improvements, and business management.



@ Rachael Orlando



@ Rachael Orlando



@thegirl_onthebike



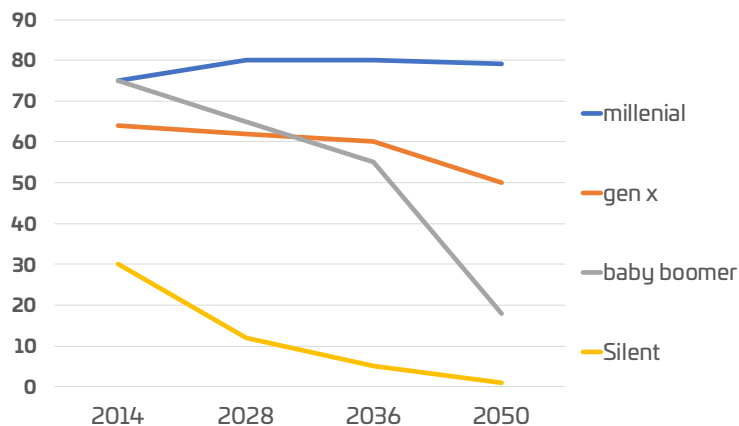
team-orlando.com



rachaelorlando.com

YEAR	Quarter	Vacancy Rate	Market Rent/SF
2021	Q4	6.4%	\$15.34
	Q3	6.3%	\$15.35
	Q2	6.2%	\$15.36
	Q1	6.1%	\$15.38
2020	Q4	6.0%	\$15.41
	Q3	5.9%	\$15.45
	Q2	5.9%	\$15.47
	Q1	5.8%	\$15.46
2019	Q4	5.8%	\$15.45
	Q3	5.8%	\$15.43
	Q2	5.8%	\$15.40
	Q1	5.6%	\$15.37
	QTD	5.7%	\$15.36
2018	Q4	5.8%	\$15.34
	Q3	5.2%	\$15.26
	Q2	5.9%	\$15.24
	Q1	6.3%	\$15.17

Population projection by US Generation



2019
FORECAST

“In this changing market, there is one thing that doesn't;
**THE WORK YOU PUT IN TODAY
WILL COMPOUND INTO TOMORROW.**

If you are waiting for the deal to show up
or the opportunities to come,
check in to your yesterdays, and you'll realize
WE MUST LOOK BACK TO GET TO THE FUTURE.”

► RACHAEL



SMALL IS THE NEW BLACK

RETAILERS WILL
CONTINUE
TO DOWNSIZE



THERE WILL BE
MORE REPURPOSING
OF RETAIL SPACE FOR
“BEST USES”
AS VACANCY RATES
AND MARKET RENTS
COME TOGETHER IN 2020



BY 2020

CONSUMERS WILL
NO LONGER
BE TALKING ABOUT
THE DICHOTOMY OF
BRICK AND MORTAR
BETWEEN ONLINE -
AND BEGIN REFERRING
TO IT ONCE AGAIN AS
SIMPLY, RETAIL

INDUSTRY STATISTICS

92%

OF CONSUMERS SHOP
at discount retailers

850

ONLINE ONLY RETAILERS
will open brick and
mortar stores in the
next 5 years

>2%

OF CONSUMERS
purchase their
groceries online

IN 2019
MILLENNIALS
over take
THE LARGEST
GENERATION

14,000

PROJECTED NUMBER OF
FRANCHISE BUSINESSES
to have opened in 2018

SOARING ABOVE

CENTRAL CALIFORNIA

LASTING | SUPPORT

For 50 years, our professionals have offered superior market knowledge and unparalleled service to owners, buyers, tenants and investors seeking opportunities in retail, office, industrial, multifamily, land and investment real estate. Serving the Central Valley, Kern County and the Central California Coast, we're ready to assist you and find solutions to your unique needs.

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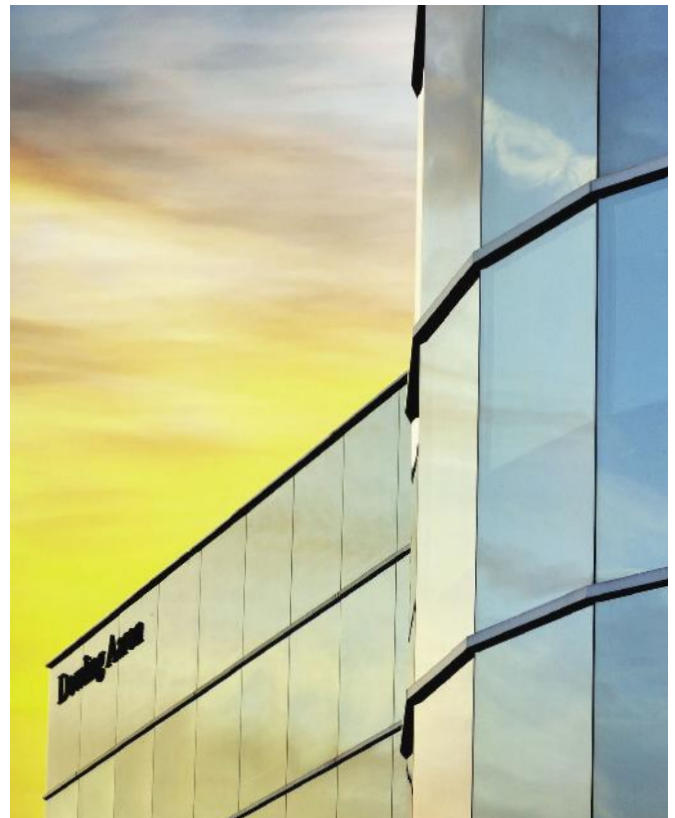
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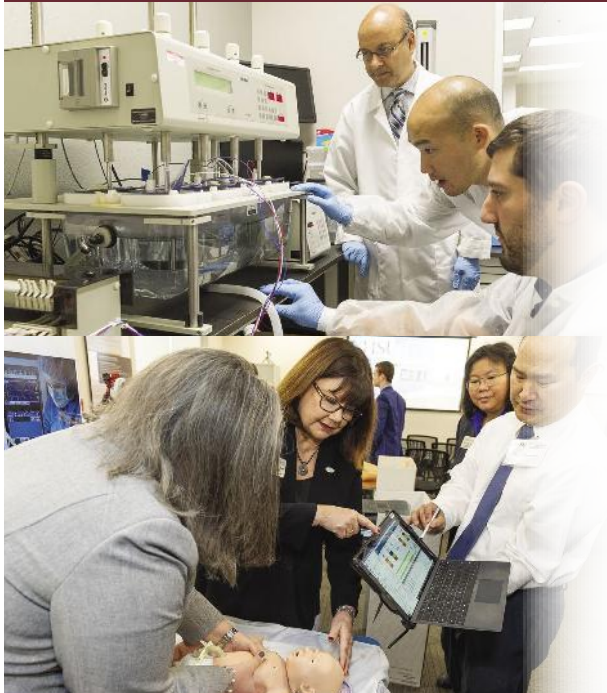
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BRANDON LAMONICA

FORTUNE ASSOCIATES
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Brandon Lamonica has been with Fortune Associates Commercial Real Estate since 2001 and has more than 17 years of market experience involving; exclusive landlord representation, tenant representation, disposition and acquisition of commercial real estate, including commercial land and investment properties. Mr. Lamonica has successfully leased over 900,000 square feet of commercial property and handled the sale of more than \$154,000,000 of commercial property within the Central Valley. Mr. Lamonica has developed a reputation throughout the industry as a hardworking and successful broker, who works diligently on behalf of his clients. Mr. Lamonica is a graduate of California State University at Fresno with a Bachelor of Science Degree in Business Administration. Mr. Lamonica has strong ties to the Central Valley and has been part of the community for more than 38 years. Mr. Lamonica is also a proud father/husband to his wife Sandra and his two beautiful children, Ella and Gavin.

FRESNO OFFICE MARKET

Survey 4th Quarter 2018

Area	TotalSF	VacantSF	Vacant%
NWFresno	3,350,235	307,444	9.18%
NEFresno	1,670,541	205,264	12.29%
WestShaw	2,090,654	244,866	11.71%
EastShaw	1,523,523	217,681	14.29%
MidCentral	1,754,254	341,816	19.48%
Airport	1,807,380	187,977	10.40%
Downtown	3,704,317	475,053	12.82%
Clovis	1,411,777	140,891	9.98%
Woodward	3,915,070	423,465	10.82%
TOTALS	21,227,751	2,544,457	11.99%



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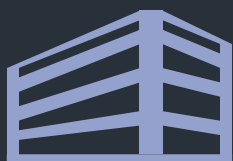
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2019
FORCAST

INDUSTRY STATISTICS

OFFICE MARKET
VACANCY RATEREDUCED BY **.5%** IN 2018HISTORICALLY
LOW UNEMPLOYMENTAT BELOW **4.0%**
HAS
AIDED
GROWTHWOODWARD PARK
SUBMARKET VACANCYDECREASED BY **1.1%** IN 2018CONSUMER
SPENDING GROWTHTO HELP SERVICE
ORIENTED COMPANIESOVER
140,000 SF
OF NEW CONSTRUCTION

BROKE GROUND IN 2018

**MEDICAL SECTOR CONTINES
TO HAVE STRONG GROWTH
AND EXPANSION****INCREASE IN
PROPERTY VALUES
AND LEASE RATES****COST OF
CONSTRUCTION
CONTINUE TO RISE**

BUSINESS PROFILE

UNIVERSAL MEDITECH, INC.

FRESNO, CA

Universal Meditech, Inc. (UMI) is a developer and manufacturer of state-of-the-art In Vitro Diagnostic (IVD) medical devices such as pregnancy tests, ovulation tests, drug of abuse tests, tumor tests, infectious disease tests, blood glucose tests, and many more. UMI located their initial operations in Tulare County with additional plans to secure a permanent U.S. headquarters in California. The EDC made contact with the company in February 2017 when they were looking for a permanent U.S. headquarters for their facility.

Citing low cost rents, availability of a diverse workforce, hiring incentives, utility rate reductions, and a business-friendly environment, UMI ultimately made the decision to locate their California headquarters in a 60,000 square foot facility at North Pointe Business Park in south Fresno.

The EDC assisted UMI throughout the process, helping them secure incentives to lower their operating costs, such as PG&E's Economic Development Rate, the Manufacturing and Research and Development Sales Tax Exemption, and the New Employment Opportunities (NEO) program. UMI is now a part of the EDC's New Employment Opportunities program, providing sustainable job opportunities to Fresno County's hardest-to-serve population, and it has recently applied for the California Competes Tax Credit, a statewide incentive to companies with job creating projects. Increasing demand for rapid, non-invasive, medical procedures has allowed In Vitro Diagnostics to evolve into a major segment of the healthcare industry. The growing global prevalence of infectious and chronic diseases such as cancer, tuberculosis, diabetes, and cardiovascular disease is expected to drive IVD market demand over the next several years. UMI is leveraging this growing demand to establish a research and development lab and a manufacturing plant to develop and produce new IVD products. To produce high-quality, low-cost products which can be sold worldwide, UMI is focused on high-tech development combined with high-value, labor intensive jobs. The EDC is honored to have partnered with UMI in making Fresno County their home and is looking forward to supporting their future growth.



"The EDC has provided us with guidance and HR resources as well as worked with us in terms of the NEO program, which has helped us save a lot of time and working capital on employee hiring. The EDC has also informed us about other incentives available for business, such as California Compete Tax Credit and referred us to proper departments and personnel for further assistance."

► Zhaoyan Wang
CEO, UNIVERSAL MEDITECH



FRESNO COUNTY ECONOMIC PROFILE

TOP 5 PROJECTED GROWTH OCCUPATIONS

FRESNO MSA (2014-2024)

Rank	SOC Code	Occupational Title	Total Employment Growth (10 yr)	Median Annual Wage
1	47-2181	Roofers	43.2%	\$47,903
2	27-3091	Interpreters and Translators	40.6%	\$49,243
3	29-2041	Emergency Medical Technicians and Paramedics	39.6%	\$32,971
4	31-1011	Home Health Aides	38.6%	\$20,588
5	47-2051	Cement Masons and Concrete Finishers	38.4%	\$34,872

Source: California Employment Development Department, Employment Projections by Industry and Occupation, February 2019

TOP 5 PROJECTED GROWTH INDUSTRIES

FRESNO MSA (2014 - 2024)

Rank	Industry	Total Employment Growth (10 yr)	Total Projected Employment (2024)
1	Construction	33.3%	18,000
2	Educational Services, Health Care, and Social Assistance	24.1%	70,600
3	Leisure and Hospitality	22.9%	37,600
4	Professional and Business Services	17.7%	36,600
5	Transportation, Warehousing, and Utilities	16.8%	68,200

BUSINESS INCENTIVES

HIRING INCENTIVES:

EDC New Employment Opportunities (NEO) Program:

Wage reimbursement available to qualified employers hiring qualifying Fresno County residents.

➤ Weeks 1-13 = 100% Reimbursement

➤ Weeks 14-26 = 75% Reimbursement

*Extensions available for up to a full year of partial reimbursement.

ADDITIONAL HIRING INCENTIVES:

New Employment Credit (NEC):

California hiring credit available to qualified employers hiring qualifying employees. Employees must be located within a Designated Geographic Area. Credit is 35% of wages paid between 150%-350% of minimum wage.

Work Opportunity Tax Credit (WOTC):

Federal tax credit available for hiring qualifying individuals from certain target groups. Maximum tax credit ranges from \$1200 to \$9600 per qualifying hire.

Employment Training Panel (ETP):

State reimbursement program for costs of customized training of new or existing employees. Upgrade employee skills by creating customized training program through approved training agencies.

LOCAL INCENTIVES:

PG&E Economic Development Rate:

Available throughout Fresno County, the program is designed for businesses that are considering locating within California and have out-of-state options; local businesses that are considering relocating to other states; or businesses at risk of closing their existing operations entirely.

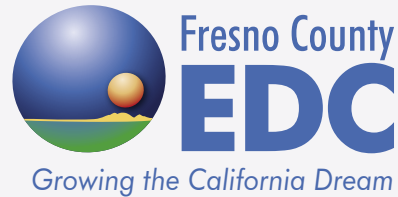
➤ Qualifying companies in Fresno County may receive up to a 25% reduction for 5 years on their monthly electricity costs.

Fresno County Fee Deferral Program:

County of Fresno incentive available to qualifying job producing projects. Projects may defer 75% the County's Plan Review/ Building fees, with a maximum of \$50,000 deferment per project.

➤ Fees repaid 25% annually for three years. Project must create at least 20 jobs either directly or indirectly.

**See each individual City page for City Incentives*



STATE INCENTIVES:

California Competes Tax Credit:

State income tax negotiated between the state and businesses that want to grow or relocate in California. Credit amount depends on several factors, including, but not limited to: job creation, economic impact, amount of investment in California by business.

➤ During 2017, Fresno County businesses have been awarded over \$9.5 million in state tax credits

Manufacturing Equipment Sales & Use Tax Exemption:

California sales and use tax exemption on manufacturing and related equipment. Also applies to leased equipment and for materials needed to construct a new manufacturing facility.

➤ Eliminates 3.9375% of California sales tax portion
➤ Immediate benefit—no state tax paid at time of purchase



SPOTLIGHT

FEDERAL INCENTIVES:

Opportunity Zones:

Available at the Federal level originating from Tax Cuts and Jobs Act of 2017. Opportunity Zones are designed to incentivize capital investments in low-income communities nationwide.

- A temporary deferral; of inclusion in taxable income for capital gains reinvested into an Opportunity Fund.
- Long term investment; the basis is increased by 10% if the investment in the Opportunity Fund is held by the taxpayer for at least 5 years and by additional 5% if held for at least 7 years, thereby excluding up to 15% of the original gain from taxation.
- Permanent Exclusion; of taxable income from sale or exchange of an investment inside an Opportunity Zone for investments held up to at least 10 years.

Foreign Trade Zone (FTZ):

Fresno County is part of FTZ No. 226. The FTZ Program is a federal program used to help encourage value added activity at U.S facilities in competition with foreign alternatives by allowing delayed or reduced duty payments on foreign merchandise as well as other savings.

- Duty deferral
- Duty elimination
- Inverted tariff relief
- Ad valorem tax exemption
- No time constraints on storage

HUBZone (Historically Underutilized Business Zone):

Federal program that helps small businesses in designated cities gain preferential access to federal procurement opportunities.

New Market Tax Credits (NMTC):

The NMTC is a federal financing program created to spur new or increased commercial or industrial investments in economically distressed areas. Businesses can receive capital to fund projects, business expansion, or debt refinancing.

- Project must have a community benefit (i.e. job creation of skilled workforce or employ those from under-served communities).
- NMTC can fund 20%-23% of a proposed project.
- Ideal for projects seeking between \$1 million to \$9 million of additional capital.

CAEATFA Sales & Use Tax Exemption:

A FULL California sales tax & use tax exemption program administered by the California Alternative Energy & Advanced Transportation Financing Authority (CAEATFA) available to projects in qualifying manufacturing industries. Qualifying projects include:

- Advanced Manufacturing
- Manufacturers of alternative source products
- Manufacturers of advanced transportation products

Recycling Market Development Zone (RMDZ):

Incentive available to businesses throughout Fresno County that use recycled or recovered materials as raw materials in their manufacturing processes or reduce the creation of solid waste. Benefits include:

- Low interest micro-loan program (up to \$2 million)
- Development and permitting assistance
- Waiver or reduction of development/permit fees

Research and Development (R&D) Credit:

Available at the State and Federal level, the R&D Credit provides a tax credit on a portion of expenses incurred by businesses for qualified research.



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HIGH-SPEED RAIL



HSR mobilized its 2000th construction worker in May 2018. Now, over 2,500 workers have been dispatched, 1,200 of those are in Fresno County.



Alert-O-Lite owner, Debbie Hunsaker (left) poses with EDC President and CEO, Lee Ann Eager (right) during the company's grand opening of its new location.



The San Joaquin River Viaduct will carry HSR trains over existing freight lines and across the river into Madera County.

HIGH-SPEED RAIL BUSINESS SUPPORT PROGRAM

The Fresno County EDC HSR Business Support Program is one of the largest job retention efforts in our region. There are over 300 businesses and property owners impacted along the alignment representing thousands of jobs. Our team works diligently to retain those jobs in Fresno County by offering a variety of business services including site search and selection, acquisition assistance, business and financial planning, and permitting and entitlement assistance with the City and County of Fresno.

HIGH-SPEED RAIL AND THE EDC

We have accomplished a great deal in 2018 and the early part of 2019 as some of our oldest local businesses successfully relocated, but it has also been a time of reflection as EDC's role in the project nears its end. Looking back, our team has assisted over 396 businesses and property owners directly within the alignment or footprint of the railway's future facilities, and we have assisted numerous other businesses with indirect impacts such as construction and road closures. We have fielded thousands of calls about the project and connected hundreds of brokers, agencies, civic leaders, planners, and contractors in order to find viable solutions to often complex problems. We have supported, and been supported by, our closest partners—the City and County of Fresno and the High-Speed Rail Authority, as well as many other local leaders and agencies.

We continue to serve a handful of businesses still in the process of relocating or reconfiguring, and we keep a “finger on the pulse” of those business which have already moved.

As construction progresses, EDC looks forward to maximizing the impact of one day being connected to the state's largest economies by high-speed rail; we are confident that an HSR heavy maintenance facility in Fresno County will become reality; and we are inspired, with our residents and businesses always in mind, to help shape the future of Fresno County in a responsible and purposeful manner.



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- Have access to job retention services to help reduce turnover

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COUNTY of FRESNO



DEPARTMENT OF PUBLIC WORKS AND PLANNING:
DEVELOPMENT SERVICES AND CAPITAL PROJECTS DIVISION

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FRESNO COUNTY'S RAPID RESPONSE AND BUILDING PLAN CHECK/PERMIT FEE DEFERRAL PROGRAMS

DO I QUALIFY?

To participate in either or both of these programs, participation must be pre-approved, specifically:

- Construction of a new business or expansion of an existing business must result in the creation of at least 20 new full-time jobs
- The job creation identified must be realized within two years after building occupancy is granted

ARE THERE OTHER REQUIREMENTS I SHOULD BE AWARE OF?

Yes, in order to participate in the building Plan Check/Permit Fee Deferral Program, please see the program provisions/requirements that are listed below:

- The maximum amount of the deferral is \$50,000 per project;
- A fee deferral payment agreement must be executed between the applicant/property owner and the County; and
- The terms of the applicant/property owner fee deferral payment agreement must include the deferral provision that in the event fees are unpaid, a lien against the property recorded for the delinquent amount until the fees are paid.

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CITY of CLOVIS

FUTURE DEVELOPMENT IN THE SIERRA GATEWAY DISTRICT

Two business parks have key infrastructure completed, winning awards because of dedicated efforts from the City of Clovis.

DRY CREEK INDUSTRIAL PARK

(Minnewawa and Herndon Avenue near Freeway 168)

This is a prime location for industrial developments with a range of footprints perfect for those needing easy access to main thoroughfares.

CLOVIS RESEARCH AND TECHNOLOGY PARK

(Temperance and Alluvial Avenue near Freeway 168)

This park is the future home of the California Health Sciences University's (CHSU) post-graduate medical school campus. It is uniquely situated to serve the medical industry, professional services, and advanced manufacturing businesses.

INDUSTRY ADVANTAGE

Healthcare: The healthcare industry cluster is an area of strength in Clovis. The high demand for healthcare and opportunity for mutually beneficial healthcare services in the Sierra Gateway District make it a prime location for expanded operations. Industry education from CHSU, CSU Fresno, and Clovis Community College ensures that an appropriately trained workforce is readily available.

Research and Technology: Developing a campus of compatible businesses to foster growth and the transfer of knowledge is the primary motivation behind the Clovis R&T Park. This area is already home to several technology-based companies, such as Precision Plastics, Cisco, APPL, Inc., and CargoBay, which can foster growth of micro and startup businesses and the new medical school—California Health Sciences University.

Retail: New retail opportunities, adjacent to freeway access and main transportation channels, will support the growth of community and industry in the northeast part of the metro area. Businesses locating here will be helped greatly by new residential developments in both Fresno and Clovis.



OLD TOWN CLOVIS:

A HUB OF CENTRAL VALLEY CULTURE

Old Town Clovis at Centennial Plaza has had a dramatic facelift with two new three-story commercial buildings flanking outdoor community space. Included in this development are brand new contemporary shops, eateries, and professional offices. In addition to being in a growth area, Old Town is host to over 75 free events annually that make Clovis a uniquely entertaining destination. The recently adopted plan for the beloved Old Town is facilitated by many planned projects such as the new Fresno County Library, Clovis Senior Center, and Transit Hub. These projects reinforce Old Town as the heart and soul of Clovis for residents, businesses, and visitors.

The City of Clovis is a forward-thinking community with a population of nearly 114,000, an increase of 50% since 2000. It is the third fastest growing of cities with population over 100,000 in California. Its thoughtful development has created a welcoming and advantageous environment for new and established businesses.

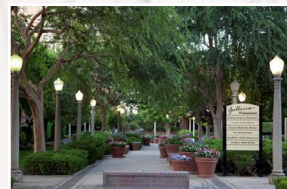
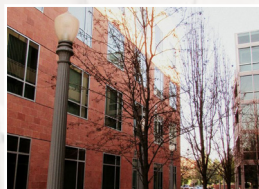




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- Tax related to Nurseries is \$2 per square foot canopy

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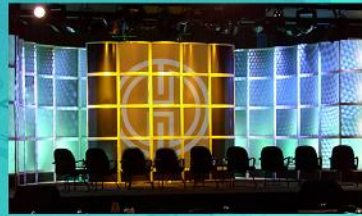
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- 16 million gallons of water storage capacity
- Class 3 ISO Rating
- 2 million gallon per day wastewater capacity and poised for future growth
- City-owned and operated natural gas utility

BUSINESS INCENTIVE PROGRAMS:

- Rural City Revolving Loan Fund
- New Employment Credit
- California Competes Credit
- Manufacturing Equipment Sales/Use Tax Exemption
- Research & Development Tax Credit
- New Market Tax Credit
- Recycling Market Development Zone
- Coalinga Revolving Loan Fund

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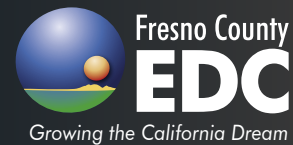
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CITY of FIREBAUGH

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- 800 acres of available industrial land
- 50 acres for available commercial land
- New development projects may qualify for a reduction in city development impact fees
- HUBZone (*Historically Underutilized Business Zone*)

ESTABLISHED BUSINESSES:

- **TomaTek:** One of the Valley's biggest tomato processing plants
- **Red Rooster:** A ripening, cold storage, and shipping facility for agricultural based products
- **Wonderful Orchards:** The world's largest grower of almonds, pistachios, and pomegranates
- **Horizon Nut:** Pistachio grower and manufacturer group who make up 70% of California pistachios
- **Olam International:** A global market leader in spices and vegetable ingredients

RETAIL GROWTH:

- **Dollar General** Store opened February 3, 2018
- **Burger King** to open in 2019

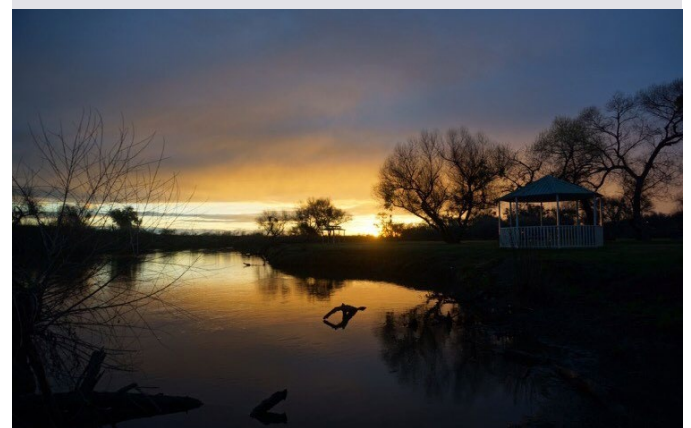
WEST HILLS COMMUNITY COLLEGE PLANNED EXPANSION:

- 48,000 square foot, \$44.1 million building
- Will include a Fresno County Library
- Construction starts in late 2019

The City of Firebaugh is best known for its agriculture and is home to some of agriculture's key businesses. With a business-friendly local government and expanding businesses, Firebaugh is set to flourish. The new general plan outlines Firebaugh's economic growth through new and sustainable commercial and industrial development.



The city is serviced by the dedicated Business Development Department who assist businesses with development, expansion, and relocation of commercial or industrial business within the city. Come see and be a part of the change happening in Firebaugh!





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CITY of FOWLER



WHY CHOOSE FOWLER?

- Promotes a business-friendly environment
- 5 miles south of the Clovis-Fresno Metro area
- Highway 99 adjacent
- Ready to work labor force
- Local hiring incentives
- Recycling Market Development Zone
- Foreign Trade Zone

SMALL TOWN CHARM



The City of Fowler is a progressive community with small town charm that delivers smart solutions and facilitates economic development. The city is dedicated to supporting the business community and aiding in their growth and advancement. Fowler is an ideal location for new business. It is centrally located, with rail access adjacent to HWY 99, Manning Avenue,

and Golden State Boulevard, just five miles south of Fresno. Land is readily available for business expansion opportunities in the large industrial corridor.

CURRENTLY UNDER CONSTRUCTION

OPENING IN EARLY SPRING 2019

- Adventist/Valley Children's Fowler Medical Plaza
 - Partnership between Adventist Health & Valley Children's Hospital
 - 16-Acre state-of-the-art medical plaza
- Maxco Packaging expansion
 - 300,000 square feet near Manning Avenue & Golden State Blvd

INDUSTRIAL SITES

- Highway 99 Frontage
- Lot sizes are 13.24 Acres total, ranging in size from .79 acres to 2.28 acres
- Build to Suit



CITY of FRESNO



BUSINESSES BOTH BIG AND SMALL MEAN JOBS FOR FRESNO!

The recent location of new businesses and expansion of established businesses in the City of Fresno has resulted in an increase in jobs for residents and a much needed decrease in the unemployment rate.

Large e-commerce and fulfillment centers such as Amazon, Ulta Beauty, and Gap, along with smaller businesses such as Universal Meditech, Inc. and Osso Good Bone Broth Company, who have relocated from the Bay Area and elsewhere in California, have brought an influx of nearly 4,000 jobs with plenty of talented workforce still available. These new companies are spurring even more interest in the area.

The high-quality workforce, along with potential incentives from the City of Fresno and other federal and state programs such as the Opportunity Zones and New Markets Tax Credit, make Fresno the ideal place to do business in California.



TESTIMONIALS FROM BUSINESS LEADERS:

Regarding the relocation of the Osso Good Bone Broth Company Production Facility to Fresno from the Bay Area...

"In the short amount of time we have been in Fresno, we've been able to expand our business tenfold while obtaining USDA inspection. We have met and hired some of the most generous and hardworking people in Fresno, and we certainly couldn't imagine being located anywhere else."

► Meredith Cochran
Owner, Co-Founder and Chief Executive Officer
THE OSSO GOOD BONE BROTH COMPANY

Regarding the relocation of the Universal Meditech, Inc. headquarters to Fresno from the South Valley...

"We are extremely grateful for the City of Fresno and Fresno County EDC's commitment to keep growing companies, like us, in California."

► Candace Liu
Chief Operating Officer
UNIVERSAL MEDITECH, INC.

Regarding the selection of Fresno as the home of Ulta Beauty's West Coast distribution center...

"We are so grateful for the community support we have received since the day we decided to call Fresno home to our newest distribution center. We could not be more proud of the team we have built."

► Nikkea Lee
Manager Network Expansion
ULTA BEAUTY





CITY OF KERMAN



DEVELOPMENTS

The City of Kerman continues to experience growth & development.

- **RESIDENTIAL GROWTH** boomed this year with a 30-acre development with 141 Single Family Homes. The northeast corner of Whitesbridge (180) and Siskiyou Avenues will also include a commercial lot and multi-family housing pending annexation which is currently waiting for the Sphere of Influence and General Plan approval.
- **COMMERCIAL GROWTH** also continues this year with the grand opening of The Den Smokehouse and Brewery Restaurant in the downtown area along with the completion of Store Max Storage Units' second expansion. There are also several other projects in the works:
 - ◆ Commercial processing plant on Church and Madera Avenue
 - ◆ A new motel will begin construction pending grading plans
 - ◆ Mac's Equipment, Inc. will begin multi-phase construction with a 20,000 square foot building on West Commerce Way in Phase I and two smaller 4,500 square foot buildings in Phase II
 - ◆ Jack in the Box begins construction with recent PG&E & Caltrans approval
 - ◆ Energy efficiency continues to be a top priority for the City, with 120 energy saving projects approved or finished with 40 more in plan check.

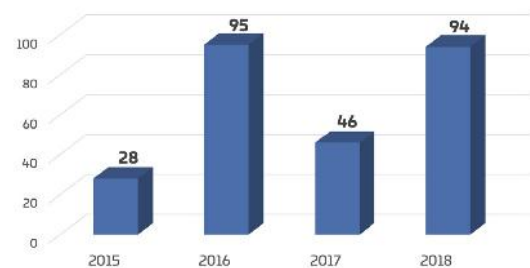
COMMUNITY COMES FIRST

Located just 16 miles west of Fresno in the heart of California's San Joaquin Valley, Kerman is a growing city with a small-town flavor. The expansion of the Sphere of Influence boundary has begun, and the City of Kerman and the City Council have planned, financed, and developed the necessary support infrastructure to properly support this growth.

A recent survey indicated that Kerman has one of the lowest crime rates of incorporated cities in Fresno County. Also, in addition to an extensive parks system (over 47 acres of developed parks), the City of Kerman offers a wide variety of youth and senior citizen recreational activities, programs, and transit services.

With great emphasis on quality of life and a maintained focus on Service, Safety, and Community, the City of Kerman is a place where Community Comes First and a shining example of how Fresno County is "Growing the California Dream".

BUILDING PERMITS ISSUED





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CITY OF KINGSBURG

OFFERING ENTICING INCENTIVES

Kingsburg's highway access, low crime rate, skilled workforce, and business-friendly City Council all add to the desirability of this Central Valley city.

Kingsburg offers several incentive packages to entice developers:

- Streamlined 21-day administrative approval process for permitting
- 50% rebate of the city's portion of real estate property taxes for three years
- 50% rebate of the city's portion of sales tax for three years
- Additional reduction or elimination of city development impact fees for qualifying developments
- 25% reduction in the city's Capital Facilities Fees

Highway Commercial Opportunities:

Highway 99 averages 60,000 vehicles per day, and prime highway commercial space has recently become available for sale at the main entrance to the city. There are various size parcels perfect for fast food chains, hotels, and national retailers.

Kingsburg Business Park:

Easy highway access and visibility make the Kingsburg Business Park an ideal place to expand or relocate businesses. The park has 40 acres of shovel-ready parcels with varied zoning. The website kingsburgbusinesspark.com is a one-stop reference showing parcels that are available, infrastructure, zoning, and who to contact. The Kingsburg Business Park is home to Safe Food Alliance's 20,000 sq. ft. laboratory and research center with two additional businesses in construction.



WAL KOMMEN!

Kingsburg was the ONLY city in California in the Small Business Revolution, Season Two. IT WAS ONE OF THE TOP 5 U.S. FINALISTS.

SUCCESSES

COMMERCIAL

- \$33.6 million in new commercial capital investment
- Opening of 25 new businesses in the last 12 months
- Creation of 588 jobs over a 24 month period

RESIDENTIAL

Residential growth has significantly accelerated with approximately 500 single-family homes in various stages of development within city limits.

MEETING THE DEMANDS OF BUSINESSES LARGE AND SMALL



CITY OF ORANGE COVE



COME GROW WITH US

The City of Orange Cove is an agricultural community located along the eastern foothills of the Sierra Nevada Mountains. East of State Route 99, Orange Cove lies 3 miles southeast of Fresno and is approximately a 4-hour drive to Los Angeles and the San Francisco Bay Area. The city proudly offers hundreds of acres of year-round harvested citrus fruits, including many varieties of oranges and lemons, with major packing operations surrounding the community. The city offers a large labor force to meet the needs of any commercial or industrial business.



- Total Population = 9,567
- Total Households = 2,177
- New Construction Spaces Available from 1,000 to 30,000 SF
- HUB Zone Area
- Ground Lease or Build to Suit
- Free Standing Pads Available
- Below Market Rents



ORANGE COVE CARES ABOUT YOUR SUCCESS

With exceptional customer service experience, the City of Orange Cove has quickly become successful in attracting new businesses. The city is currently assisting interested developers to identify specific properties suitable for their desired development. For existing businesses, entrepreneurs, small businesses, new retail, or investors, the City of Orange Cove, with the help of our local partners, will assist with business development plans, financing, marketing, and other economic development strategies and incentives.

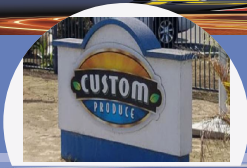
INCENTIVES

The City of Orange Cove supports and promotes local businesses and may provide permit fee reductions, deferrals of impact fees, and incentives for local hires on a per project basis.

AVAILABLE LAND

The City of Orange Cove has a total of 44 acres designated for industrial development: 14.4 acres with infrastructure in place to expedite the construction of new facilities and 25 acres of available commercial property.





CITY OF PARLIER



AN ECONOMY ON THE RISE

HOUSING OPPORTUNITIES

Parlier was awarded 2 million dollars from the State Department of Housing & Community Development for the Federal Community Development Block Grant (CDBG). This grant was funded, and is continuing to fund, many major programs with most of the money aimed at making it easier for Parlier's residents, and future residents, to purchase a home or repair their current home.

HERITAGE PARK

A new regional park including a state-of-the-art soccer field, open market area, and splash pad for water play will be open to the public in April 2019. After a seven-year journey from the inception of the initial community planning committee to completion, Heritage Park in the heart of downtown will be a treasure to be enjoyed by families in the city.

PRIORITY ON PUBLIC SAFETY

With great support of the residents, the City of Parlier doubled the sworn police force from 9 in 2016 to 18 in 2018, along with significant updates to vehicles and equipment. In addition, the City is working strategically to take local control of dispatch services and planning for an independent fire and emergency medical services to minimize call times and maximize public safety.

NEW DEVELOPMENTS

The City of Parlier is on the move, with approved plans in motion for construction of residential homes, commercial restaurants, housing authority projects, and new manufacturing facilities. In addition to the presence of major anchor employers such as Maxco and Sun-West, Parlier's regional industrial park includes new headquarters for the Consolidated Mosquito Abatement District and facilities for manufacturers such as Custom Produce, Diamond Weld, and leading-edge cannabis producers such as Genezen-Zensana.

Parlier is ideally situated on the Manning business corridor at the center of the Selma-Sanger-Reedley triangle in Eastern Fresno County, only 30 minutes from the County seat in Fresno, California. As part of a metropolitan area of over 1 million people, halfway between the San Francisco Bay Area (199 miles) and Los Angeles (210 miles), the City of Parlier offers excellent business site infrastructure and services for enterprises of every size serving a wide range of markets.

With traffic counts approaching nearly 24,000 cars per day along Manning Avenue, Parlier offers excellent transportation access to the Sierra foothill communities, Eastern Fresno County, and northern Tulare and Kings Counties, as well as connection to the state freeway network through routes CA-180 and CA-99.



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*Fall 2018 Nielsen TSA Ratings



CITY of REEDLEY



ENVIRONMENTAL STEWARDSHIP & DEVELOPMENT

Reedley is committed to bringing strategic growth and sustainable infrastructure projects to the area. As the home of the first in the nation, SSTe All Electric A School Bus system, and the placement of the first in the western hemisphere, all-electric aircraft at Reedley Municipal Airport, Reedley is at the forefront of environmental stewardship. The city has many other projects that support its environmental stewardship:

- Central Valley Transportation Center provides energy-conscious fueling stations
- Efficiency lighting systems in all city facilities generates renewable energy
- Solar Energy permit mitigation meets legislative state changes
- Sports Park Master Plan includes passive service draining strategies through vegetative bioswales
- 30-year utility master plan includes utility systems and a Water Conservation Program
- Air Quality Improvement Program: includes bike trails, biking community, and conservation landscape options
- Established leadership is committed to ICLEI's 5 milestones for climate mitigation
- Commercial and service growth created along Reed and Manning (UHC, River Walk II)
- Growing industrial activity includes Sun Pacific expansion, Turbo Spas relocation to Reedley, multiple mini storage sites approved
- 300 housing units approved in 2018 and 300 anticipated in 2019



GOVERNING BODY AND STAFF

- Committed to sustaining economic policies conducive to innovation and growth
- Recipient of GFOA's Distinguished Budget Presentation Award meeting the highest principles of government budgeting
- Rail Spur lines in industrial areas
- Mixed-Use Development Ordinance creating opportunities through policy
- Permit Efficiency makes Reedley a Community Building Leader

DEVELOPMENT IMPACT FEE INCENTIVE PROGRAM

- 25% reduction on development impact fees for qualified projects located within Reedley's Civic Center boundary
- 80% of development impact fees deferred for qualifying projects; Fees may be deferred until issuance of a certificate of occupancy by the city or for a maximum of two years, whichever comes first; 20% of development impact fees paid at the issuance of the building permit
- Development Impact Fee Incentives available for qualified businesses to promote 90% downtown occupancy

FOCUS ON SAFETY

- One of the lowest crime rates in the Central Valley
- Community Policing Program

EDUCATED WORKFORCE

- Access to an excellent, work-ready workforce from Reedley College
 - Reedley College is now offering an electric aviation program

BUILDING THE FUTURE

The City of Reedley meets the unique challenges of building a city by promoting development entitlement timelines and processes, resulting in consistent standards for doing business

The city has a supportive governing body driven by a desire to create an educated, well-structured, and successful business environment in a safe community

Reedley is looking to the future by making environmentally conscious decisions, expediting regulatory processes, and preparing for emerging trends in businesses and housing

CITY OF SAN JOAQUIN



PROVIDING SAFE PARKS AND RECREATIONAL FACILITIES

The City of San Joaquin continues its focus on quality of life, families, and future economic opportunities. Strategically located 35 miles west of Fresno near I-5, with access to SR-33, SR-180, SR-145, SR-41, and SR-99, San Joaquin, with its beautiful agricultural landscapes, is the vibrant cornerstone of Fresno County. Residents and businesses enjoy the small-town camaraderie found in the beautiful city of San Joaquin.



"THE CITY OF SAN JOAQUIN ENVISIONS A BRIGHT FUTURE FOR ECONOMIC OPPORTUNITY, FAMILY LIFE, AND CIVIC DEVELOPMENT"

► Elizabeth Nunez, City Manager



CITYWIDE GROWTH

- The city's current general plan upholds community design standards for new construction and a regeneration of downtown
- City wide infrastructure improvements have been made to compliment city growth

2019 PROJECTS

- Infrastructure improvements to the sewer system - January 2019
- Additional infrastructure improvements during 2019 will include: replacing water lines, implementing a filtration treatment system, developing a new well, and constructing a 750,000-gallon water storage tank

EMPHASIS ON QUALITY OF LIFE

The Peter Rusconi Park has an intermediate skate park, basketball court, and a picnic area with oversized barbecue pits that can accommodate any size gathering.





CITY OF SANGER

KINGS RIVER TECHNOLOGY PARK DEVELOPMENT

- 42 acres available
- Custom created parcels
- Zoned heavy industrial
- Rail available
- Shovel ready and infrastructure in place
- Close proximity to California SR-180
- New Comcast high-speed internet fiber & coax services



SANGER BUSINESS HIGHLIGHTS

UNITED HEALTHCARE BRINGS MEDICAL CARE TO SANGER:

- More than 15,000 SF
- 10 dental operatories
- 21 medical exam rooms
- 3 optometry exam rooms

INITIATIVE FOODS, LLC. EXPANSION INCLUDES:

- Initiative Foods, LLC a state-of-the-art baby food manufacturing 28,500 square foot site, coming Spring 2019
- Third largest baby food manufacturer in the world plans to continue growth in the City of Sanger and to provide new products for customers with new advanced manufacturing jobs

COMING IN 2019/2020

- City annexation to align with CA-180
- 254 acres of commercial property
- Depths at 500 and 1,200 feet from Academy

EXPANDING & LOOKING FORWARD

SANGER FOCUSES ON BUSINESS AND COMMUNITY SUCCESS!

BUSINESS INCENTIVES

The City of Sanger continues to work with new businesses who are interested in locating to the local area, creating opportunities for businesses to work with the city staff and the City Council to develop customized incentive programs. While standardized incentive programs are not available, staff works one-on-one with each business to develop a program that best suits their needs. For example, incentives may include multi-year deferral of impact fees or fee credits for newly created jobs filled by Sanger residents.

RESIDENTIAL DEVELOPMENT

The city has sold more than 700 homes since 2016, spurring the demand for new residential construction. D.R. Horton Homes is starting development of a 195-lot subdivision on the city's east border in 2019.



Sanger is located just minutes east of Clovis-Fresno Metropolitan area on CA-180. In 2015, the city was presented with the statewide Award of Excellence in city/business relations by the League of California Cities.

CITY of SELMA



A PRIME LOCATION FOR BUSINESS AND LIVING

From its large retail corridors along State Highway 99, industrial parks, and pedestrian friendly downtown, the City of Selma is poised for continued growth, and business development is one of its top priorities. Residential, commercial, and industrial projects are underway in Selma, the largest city in southern Fresno County. It is centrally located to serve the tri-county regions of Fresno, Tulare and Kings counties. Within a 15-minute drive, approximately 153,817 people can come to shop in Selma. Conveniently located along California State Routes 99 and 43, Selma is a prime location for business and living. San Francisco, Los Angeles, and the Central Coast are each only approximately 200 miles from Selma.

EXCELLENT QUALITY OF LIFE

Kings Canyon, Sequoia, and Yosemite National Parks are only 70 miles away.

Selma is centrally located along the Golden State Corridor (old Highway 99) between the cities of Fowler and Kingsburg. This 13.5 mile stretch is part of a master plan to include landscaping along with walking and biking trails between the three cities.

The Selma Arts Center plays a vital role in bringing performing arts to the region with eight productions each season in addition to other events.

A new high school stadium is slated for 2019 and will further Selma Unified School District's commitment as a Triple AAA District of Excellence focusing on Academic Achievement, Arts, and Athletics.

Healthcare options continue to grow in Selma. Adventist Medical Center plans to complete a \$13 million expansion and upgrade project in 2019. United Health Centers is opening a Selma Center in 2019. Kaiser Permanente has medical offices in Selma as well.



BUSINESS INCENTIVES

The City of Selma is committed to your project and responsive to your development needs. Working with our partners, we encourage development with a variety of incentives such as workforce development programs, special utility rates, and financing options.

THRIVING BUSINESSES

COMMERCIAL/INDUSTRIAL

- Harris Ranch Beef
- Poindexter Nut Company
- Quinn Company
- Alta Lift
- Basalite Concrete Products
- Fahrney Automotive
- Selma Auto Mall
- Walmart
- Home Depot
- Boot Barn

A LOOK TO THE FUTURE

DEVELOPMENT OPPORTUNITIES

- Selma Grove, retail/commercial
60 acres available
- Selma Crossing, retail/commercial
288 acres available
- Golden State Industrial Park
33 acres available
- Amberwood Project, residential
248 households in Phase I underway,
with a total build out of 2,558 households
- Vineyard Estates, residential
61 households in Phase 2 under construction



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LEE ANN EAGER

PRESIDENT/ CEO
(559) 476-2513
leager@fresnoedc.com



PAUL THORN

CONTROLLER
(559) 476-2512
pthorn@fresnoedc.com

EDC STAFF



ANDREA REYES

VICE PRESIDENT
BUSINESS DEVELOPMENT
(559) 476-2506
areyes@fresnoedc.com



WILL OLIVER

DIRECTOR OF
BUSINESS SERVICES
(559) 476-2518
woliver@fresnoedc.com



JOSE N. MORA

CLIENT SERVICES
MANAGER
(559) 476-2516
jmora@fresnoedc.com



CLAY GILPIN

HIGH-SPEED RAIL
COORDINATOR
(559) 476-2517
cgilpin@fresnoedc.com



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(559) 724-9362
jlukens@fresnoedc.com



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ECONOMIC DEVELOPMENT
COORDINATOR
(559) 724-9361
ttosta@fresnoedc.com



AMANDA BOSLAND

RETAIL BUSINESS
DEVELOPMENT SPECIALIST
(559) 233-2564
abosland@fresnoedc.com



JUAN CARRANZA

ECONOMIC DEVELOPMENT
ANALYST
(559) 476-2503
jcarranza@fresnoedc.com



MIGUEL HERRERA

RETENTION
SPECIALIST
(559) 233-2568
mherrera@fresnoedc.com



JOSH HOWELL

DATA
ADMINISTRATOR
(559) 476-2520
jhowell@fresnoedc.com



MANDI JOHAL

WORKFORCE COORDINATOR
(559) 476-2510
mjohal@fresnoedc.com



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OFFICE MANAGER/
RECEPTIONIST
(559) 476-2500
mlara@fresnoedc.com



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ASSISTANT
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LAVELL TYLER

ECONOMIC DEVELOPMENT
SPECIALIST
(559) 476-2508
ltyler@fresnoedc.com



NICHOLAS VINCENT

RESEARCH
ANALYST
(559) 476-2505
nvincent@fresnoedc.com

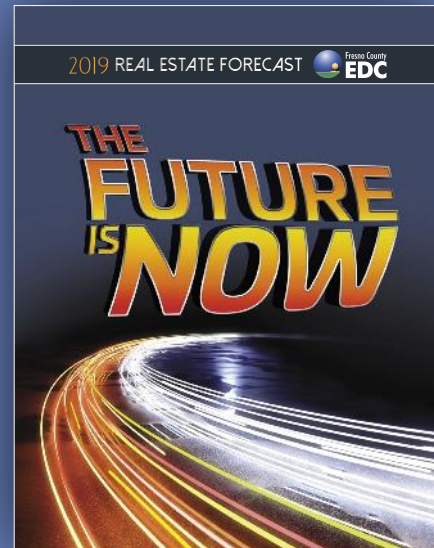


CURTIS WILLIAMSON

ECONOMIC DEVELOPMENT
SPECIALIST
(559) 476-2502
cwilliamson@fresnoedc.com

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ANDREA REYES
Vice President
Business Development

PAUL THORN
Controller

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Kellie Reed, Central Valley General Manager
kreed@tangraminteriors.com | 559.275.7070

Central Valley Showroom
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