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Fresno County, California

Comprehensive Economic Development Strategy 2025–2030



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Contents

- Overview 1
 - About the CEDS 1
 - Summary 4
- Strategic Action Plan 5
 - Objective 1. Business Growth 5
 - Objective 2. Workforce Development 8
 - Objective 3. Infrastructure & Real Estate 10
 - Objective 4. Quality of Place 12
- Evaluation Framework 14
- Summary Background 15
 - Planning Context 15
 - Regional Overview 16
 - SWOT Analysis 30
- 2025 Community Vision Survey 32
- Appendix A. Case Studies 34
- Appendix B. Long Descriptions 36

Overview

Fresno County, California, (the County) is entering a period of transformation, with the potential to drive growth and innovation across the Central Valley. As a key economic hub, the County plays a vital role in feeding the nation, facilitating trade, and developing new industries. With a strong foundation and a commitment to progress, Fresno County is poised to attract investment, create jobs, and build a more resilient economy. By fostering collaboration among its 15 cities and unincorporated communities, the County can ensure a prosperous future for businesses and residents.

As one of the nation's top agricultural producers, Fresno County supports a robust food processing and distribution supply chain. Its strategic location along major highways and rail corridors enhances its trade and logistics role. Educational institutions, such as Fresno State University, Fresno Pacific University, and local community colleges, are preparing the workforce with the skills needed for innovation and economic development. Additionally, the County's natural resources and outdoor recreation assets attract visitors nationwide.

However, Fresno County faces challenges, including economic disparities, workforce skill gaps, and infrastructure limitations that must be addressed for sustainable growth. The region must also navigate water resource issues, climate change impacts, and shifting industry demands to remain competitive.

At the same time, Fresno County is well-positioned to capitalize on opportunities in emerging industries, further diversifying its economy. Investments in renewable energy, advanced manufacturing, and agribusiness innovation can foster job creation and sustainable development. With continued focus on infrastructure improvements, workforce training, and strategic partnerships, the County can enhance its economic resilience and inclusivity.

The 2025–2030 Comprehensive Economic Development Strategy (CEDS) will guide this vision, directing investment, building resilience, and enabling access to federal and state funding for high-impact projects. This integrated CEDS emphasizes collaboration and accountability, engaging local governments, businesses, educational institutions, and residents in shaping Fresno County's economic future. By aligning priorities and fostering cooperation, the County is well-positioned to leverage its strengths and seize emerging opportunities for sustained success.

About the CEDS

The 2025 CEDS aims to create an integrated digital strategy for Fresno County, its cities, and its unincorporated communities. While the planning process considered the City of Fresno's economic gravitas and its influence on the region, this CEDS does not include strategies that directly address the city's challenges and opportunities. These strategies and related discussions are presented in the [City of Fresno 2024–2029 Comprehensive Economic Development Strategy](#) and were taken into account in the preparation of this document. The updated CEDS replaces Fresno County's 2016 strategy, providing a holistic framework for addressing regional priorities and opportunities and enabling efficient resource allocation toward shared goals. It is intended to enhance the region's economic capacity and resilience, improve coordination, and determine eligibility for federal funding opportunities.

The CEDS is a living document that should be updated regularly as economic conditions in Fresno County evolve. Designed to be carried forward by multiple organizations and partnerships, full implementation of the CEDS will rely on collaboration across a broad network, including economic development groups, local governments, workforce agencies, and industry stakeholders.

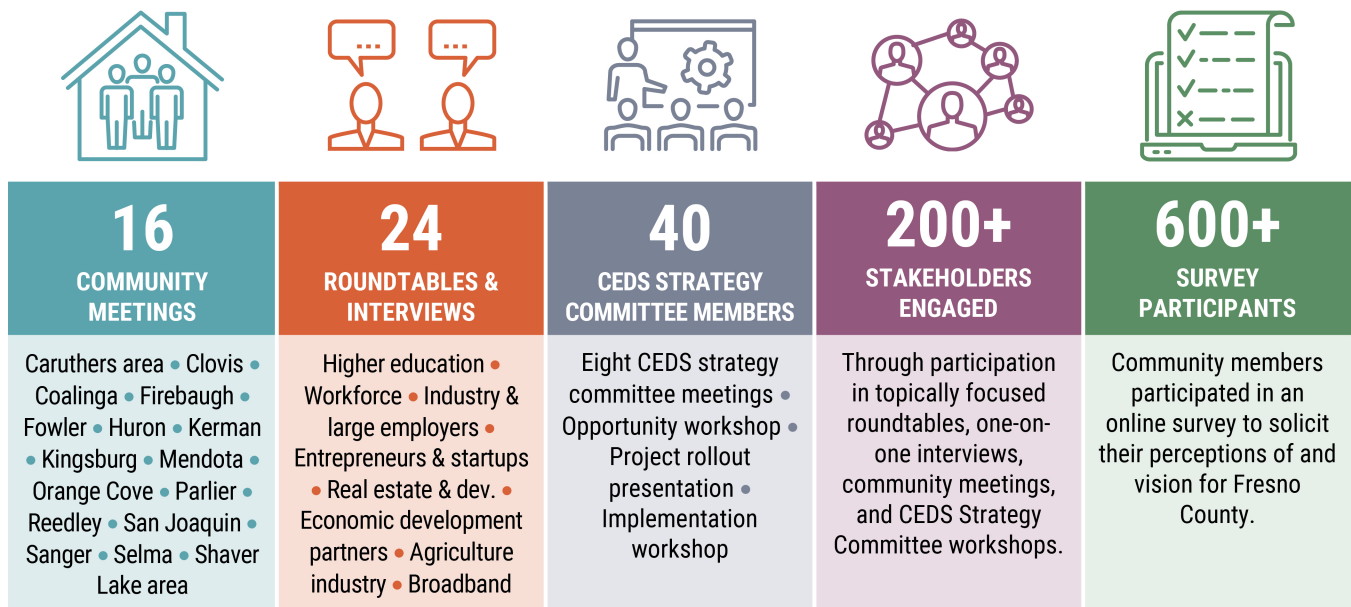
Planning Approach

The CEDS was prepared over the course of an 11-month engagement facilitated by Austin-based TIP Strategies (TIP) using the firm’s three-phase planning model: discovery, opportunity, and implementation. Guidance was provided throughout the planning process by the 40-member CEDS Strategy Committee comprised of representatives from diverse public and private sector interests.

DISCOVERY. The project’s initial phase included a review of regional initiatives and planning documents, extensive data collection and analysis, and a robust stakeholder engagement process to identify Fresno County’s priorities, assets, and challenges. Outreach efforts, outlined in Figure 1, engaged more than 200 stakeholders from nonprofit organizations, public agencies, and private businesses through roundtables, community meetings, and one-on-one interviews. Additionally, community members provided input through an online survey, which received over 600 responses. (See the 2025 Community Vision Survey section, beginning on page 32.)

Findings from the discovery phase were synthesized into a strengths, weaknesses, opportunities, and threats (SWOT) analysis, which directly informed the strategies and actions outlined in the Strategic Action Plan section. A summary of the SWOT analysis can be found in Figure 17 (page 31). TIP’s comprehensive quantitative analysis was delivered as an interactive data visualization, allowing for future exploration of the information by the County and its partners. More information on the data analysis is provided as part of the Planning Context section (beginning on page 15).

Figure 1. Stakeholder Engagement Overview



[See Appendix B for full description of Figure 1.](#)

OPPORTUNITY. During the opportunity phase, the consulting team continued to refine its initial findings through additional data analyses focused on target sectors and workforce needs, further stakeholder engagement, and a case study review. The consulting team also facilitated a virtual community workshop to gather feedback on the draft plan framework and solicit input on the prioritization of strategies. This work culminated in an opportunity workshop held with the CEDS Strategy Committee to formalize the vision statement, guiding principles, and objectives that comprise the CEDS strategic framework.

IMPLEMENTATION. The final phase of the planning process focused on co-creating prioritized strategies, building consensus with partners, and ensuring the plan’s shared execution. As part of this phase, the consulting team also provided a matrix to guide the CEDS implementation by assigning responsible parties, identifying partners, and establishing timelines, along with an interactive dashboard for tracking performance. Using these tools, the CEDS Strategy Committee and its partners should meet regularly to monitor progress and adjust the CEDS as necessary.

Strategic Framework

The resulting strategic framework guided the preparation of the Strategic Action Plan. The framework components are described in this section and illustrated in Figure 2 (page 4).

VISION. The vision statement serves as the foundation of the CEDS, providing a unifying direction for Fresno County’s economic future. It establishes a shared aspiration that guides decision-making and aligns regional priorities and resources toward common goals. Developed through collaboration with community leaders and stakeholders, this vision reflects the collective priorities of Fresno County.

*Fresno County is a place where **opportunity** is accessible to all, **prosperity** is shared, and a **diversified economy** supports **resilient, thriving communities**.*

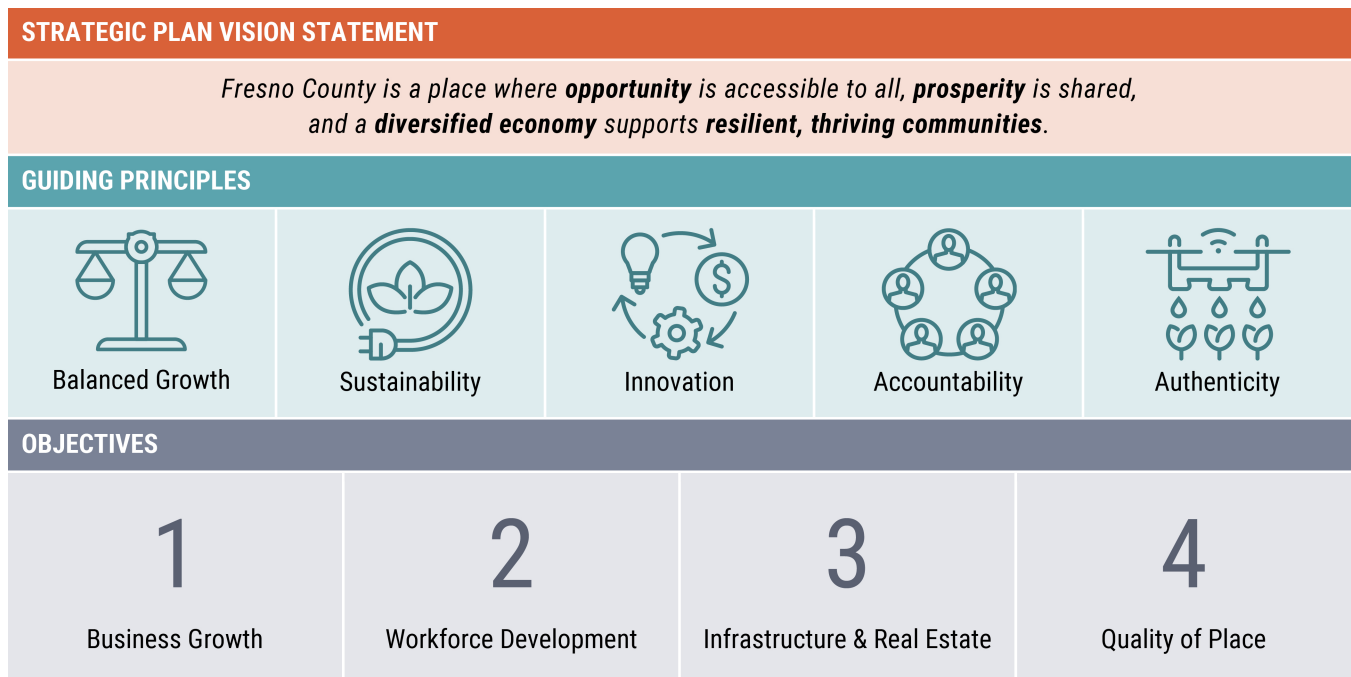
GUIDING PRINCIPLES. The CEDS Strategy Committee established five guiding principles that build on the CEDS vision and reflect the values held by regional stakeholders. These concepts are integrated throughout the strategies and action items.

- **Balanced Growth.** Fresno County promotes access to jobs and growth, ensuring that opportunities and benefits are accessible to all residents.
- **Sustainability.** Fresno County is committed to building an economy that is resilient and responsive to community needs, balancing economic, environmental, and social considerations for long-term prosperity.
- **Innovation.** Fresno County drives job creation and business growth through a data-informed approach, fostering a dynamic and competitive regional economy.
- **Accountability.** Fresno County fosters transparency, attainability, and integrity, encouraging trust and measurable progress within the community.
- **Authenticity.** Fresno County honors its agricultural legacy, diverse culture, and rich history, preserving its identity for future generations.

OBJECTIVES. The vision and guiding principles informed the selection of four objectives that would have the greatest impact on Fresno County’s competitive position and align with the stated priorities. Each of these objectives is supported by a series of strategies and actions that comprise the Strategic Action Plan.

1. **Business Growth.** Foster a competitive business environment that supports the expansion of existing industries, attracts new investment, and drives innovation to create a resilient and diversified economy.
2. **Workforce Development.** Build a skilled and adaptable workforce to drive Fresno County’s economic growth and competitiveness.
3. **Infrastructure & Real Estate.** Develop and enhance the real estate and infrastructure assets needed to support business growth and strengthen the regional economy.
4. **Quality of Place.** Elevate the region’s quality of place by creating vibrant, sustainable communities that attract talent and visitors and support local businesses.

Figure 2. Strategic Framework



Summary

Fresno County is primed for significant economic growth, fueled by its strategic central location, expanding industries, growing workforce, and relative affordability. The County's rising prominence within California and beyond is further amplified by its selection for transformative projects. Shaped through extensive engagement with business leaders, workforce organizations, local governments, and community stakeholders, the 2025–2030 CEDS reflects a unified vision for Fresno County's economic future. The plan highlights opportunities to enhance competitiveness, support the workforce, and foster a resilient and diverse economy. By aligning efforts across public and private sectors, Fresno County can take full advantage of its assets to drive sustainable growth while fostering business expansion and opening new pathways to prosperity. The successful implementation of this strategy will require collaboration, adaptability, and a lasting commitment to economic progress, ensuring that Fresno County not only meets the challenges of today but also builds a stronger, more dynamic economy for the future.

Strategic Action Plan

The 2025–2030 Comprehensive Economic Development Strategy provides Fresno County with a framework to align, coordinate, and implement economic development efforts across the region over the next five years. The Strategic Action Plan translates this vision into specific, measurable strategies aimed at fostering regional economic growth and resilience. Developed through extensive engagement with business leaders, workforce organizations, local governments, and community stakeholders, the plan outlines a clear path to an economic future where opportunity is accessible, prosperity is shared, and balanced growth informs decision-making.

By leveraging the County’s strengths and addressing challenges, the Action Plan prioritizes initiatives in the critical areas of business growth, workforce development, real estate and infrastructure investment, and quality of life improvements. These recommended actions aim to strengthen Fresno County’s economic foundation, attract and retain high-value industries, support entrepreneurship, and enhance the region’s overall competitiveness. With a focus on collaboration, accountability, and impact, this plan will serve as a dynamic tool to guide policy, investment, and resource allocation, ensuring Fresno County’s continued success as a thriving economic hub.

Objective 1. Business Growth

Foster a competitive business environment that supports the expansion of existing industries, attracts new investment, and drives innovation to create a resilient and diversified economy.

- 1.1. **BUSINESS DEVELOPMENT.** Advance business growth, retention, and expansion efforts throughout Fresno County by strengthening industry support, attracting investment, and fostering a competitive economic environment.
 - 1.1.1. Increase the number of annual existing business visits, with an emphasis on businesses in the region’s target and emerging industry clusters—including existing strengths in Agriculture & Food Processing, Healthcare, Heavy Manufacturing, Renewable Energy, and Transportation & Logistics, and evolving opportunities like agriculture technology (agtech).
 - 1.1.2. Connect businesses with tools and resources needed to thrive, including, but not limited to, legal assistance, grant programs, capital providers, and tax and accounting services.
 - 1.1.3. Support businesses in reaching new markets through trade missions and export assistance.
 - 1.1.4. Focus on building strong industry clusters and supply chains, beginning with those that cross over multiple sectors, such as agtech and water innovation.
 - 1.1.5. Explore the development of a countywide revolving loan fund to support existing businesses.
 - 1.1.6. Identify business opportunities that utilize the Central Valley’s biomass and agricultural waste to support renewable energy and value-added products and technologies.
- 1.2. **BUSINESS RECRUITMENT.** Recruit new companies to Fresno County that offer high-quality jobs and are invested in the future of the region.
 - 1.2.1. Deepen relationships with site consultants, real estate brokers, and developers across the country, specifically those who specialize in Fresno County’s target and emerging industry clusters.

- 1.2.2. Leverage the region’s existing business leaders for recruitment leads, especially for suppliers and customers located outside California.
 - Invite local businesses leaders to attend business development trips and site selector visits to offer a firsthand experience of doing business in Fresno County.
 - 1.2.3. Respond to business recruitment and retention leads with creative incentives that demonstrate the community is committed to long-term partnerships with local businesses.
 - 1.2.4. Advocate for new state and federal policies that expand business incentives, such as refundable or transferable tax credits, to enhance competitiveness and attract high-quality job creators.
- 1.3. **CBA**s. Where required, or desired by the County of Fresno, utilize community benefit agreements (CBAs) to support economic development projects while ensuring workforce, environmental, and community benefits align with county priorities.
- 1.3.1. Develop standardized criteria for CBAs based on community priorities, such as workforce development, local hiring, environmental sustainability, and infrastructure improvements. Ensure criteria are adaptable to different project types and community needs.
 - 1.3.2. Consider a County-led framework for CBAs that includes a menu of eligible projects and investments aligned with county priorities, the *Fresno County General Plan*, and state program requirements. Apply the framework where CBAs are required by policy or where the County determines a CBA is appropriate as part of project mitigation or community investment.
 - 1.3.3. Facilitate collaboration between businesses, government agencies, workforce organizations, and community representatives to define mutual benefits. Engage stakeholders early in the development process through roundtables, workshops, or through other public engagement tools to identify policies and promote transparency.
 - 1.3.4. Where applicable, incorporate CBAs into the development review process to formalize commitments that reflect shared community and business goals.
 - 1.3.5. Develop metrics and a tracking and reporting system to ensure compliance with agreed-upon CBA terms and implement accountability measures to support successful implementation.
- 1.4. **SMALL BUSINESS**. Support the growth and success of Fresno County’s small businesses by improving access to resources, strengthening local networks, and fostering a business-friendly environment.
- 1.4.1. Connect businesses with the technical assistance they need to grow and expand. Provide mobile services and on-site support to ensure businesses can access resources conveniently and efficiently.
 - 1.4.2. Support business owners with tools to cross-train employees in critical business operations and offer continuity planning to build resilience.
 - 1.4.3. Leverage Future of Food Innovation (F3) programs such as the SIEMBRA Food Fund and Hecho en Fresno to support small businesses in the food sector.
 - 1.4.4. Provide support to small and emerging businesses seeking procurement contracts with public agencies.
 - Consider procurement audits to understand potential roadblocks to contracting.
- 1.5. **ENTREPRENEURSHIP & STARTUPS**. Develop a strong entrepreneurial support ecosystem to ensure startups can grow and thrive in Fresno County.
- 1.5.1. Create and maintain an asset map of the entrepreneurial and innovation resources available to businesses located in Fresno County. This effort should include resources at the local, regional, state, and national level.

- Use the asset map to identify gaps or weaknesses in service areas that could be strengthened.
- 1.5.2.** Strengthen local capital access networks that connect entrepreneurs with diverse funding sources to help startups scale.
- 1.5.3.** Explore new opportunities to create or advocate for incentives, grants, and subsidies that can reduce the financial burden on new businesses.
- 1.5.4.** Prepare entrepreneurs to be investment-ready through customized and targeted training.
- Offer training and workshops on creating compelling business plans, financial modeling, and investor pitching.
 - Provide one-on-one coaching and mentorship to help startups refine their value propositions and growth strategies.
- 1.5.5.** Increase collaboration between higher education and the private sector to spur tech transfer and commercialization to encourage startups, especially in cross-sector industries such as agtech.
- 1.6. COORDINATION & COLLABORATION.** Develop strategic partnerships among businesses, educational institutions, and economic development organizations to align resources and drive economic growth.
- 1.6.1.** Continue to convene regional economic development professionals consistently to understand regional challenges, build on opportunities, and collaborate on new initiatives.
- Ensure meetings are engaging and purpose-driven, with a focus on advancing the CEDS, sharing best practices, and providing updates on economic development activities.
 - Convene meetings in different Fresno County communities to build awareness of regional assets.
- 1.6.2.** Attend relevant industry events in coordination with existing businesses and economic development partners to increase knowledge of trends and opportunities, as well as identify new business recruitment prospects.
- 1.6.3.** Coordinate biennial best practices visits to a peer or aspirational market to gain insights on addressing challenges and enhancing the County's competitive advantage. As the event establishes itself, consider transitioning to an annual format.
- 1.6.4.** Create an ambassadors program comprised of public and private sector leaders who are well versed in regional economic development. Ambassadors should attend regional economic development events regularly and be able to articulate the economic development vision for the region.
- Leverage ambassadors for meetings with business recruitment prospects, best practices trips, and familiarization tours.
- 1.6.5.** Develop a public engagement plan¹ to ensure a structured approach to involve community members, stakeholders, and residents in the planning, development, and implementation of economic development initiatives.
- 1.6.6.** Seek and pursue new funding streams to sustain and strengthen economic development initiatives.
- Tools such as [GrantStation](#) can be used to identify public and private funding opportunities.

¹ Examples of public engagement plans include the [Denver Regional Council of Governments 2025 Public Engagement Plan](#), the [Pierce County Public Engagement and Communication Plan](#) (prepared specifically for a housing development), and the [Michigan Area Council of Governments Public Engagement Plan](#).

- 1.6.7. Form a futures council comprised of diverse business leaders committed to the long-term success of Fresno County.
 - Conduct biannual roundtables with the council to understand the most pressing business needs and use this information to inform legislative priorities.
 - Task the council in year two with identifying and leading transformative projects in Fresno County.

Objective 2. Workforce Development

Build a skilled and adaptable workforce to drive Fresno County's economic growth and competitiveness.

- 2.1. **CAREER DEVELOPMENT.** Provide ongoing training and opportunities for workers to advance into high-quality and living-wage jobs.
 - 2.1.1. Prioritize implementation of US Economic Development Administration–funded workforce initiatives, including Good Jobs 4 Central Valley and F3 AgTEC, to support high-quality training and job placement. Leverage complementary efforts, such as High Road Training Partnerships, to expand impact and align regional talent pipelines with industry demand.
 - 2.1.2. Increase opportunities to showcase the breadth of career pathways and industries in Fresno County through career fairs, career days, and interactive digital tools that help individuals explore and envision future career opportunities.
 - 2.1.3. Develop clear, structured career pathways to guide individuals from entry-level to advanced roles. Begin with charting pathways in the County's target industry sectors before expanding to other industries.
 - 2.1.4. Expand on-the-job training and provide incumbent workers with opportunities to advance their skillsets.
 - 2.1.5. Expand access to high-quality workforce programs by extending successful metro-area initiatives into rural communities, thereby reducing transportation barriers and ensuring broader regional participation.
- 2.2. **WORKFORCE PIPELINE.** Develop a robust workforce pipeline by fostering partnerships between education, industry, and community organizations to equip the future workforce with the skills to thrive in a dynamic economy.
 - 2.2.1. Bolster youth career exposure programs for K–12 students by partnering with schools and local organizations to provide hands-on experiences that introduce them to potential career opportunities in Fresno County. Ensure that materials and events are also available and open to guardians.
 - 2.2.2. Expand and develop in-demand career and technical education programs in response to market demand, ensuring that students acquire the skills necessary for high-growth industries.
 - 2.2.3. Motivate businesses to invest in structured internship and apprenticeship programs, fostering a skilled workforce and creating pathways for young professionals to enter the industry.
 - 2.2.4. Develop targeted initiatives aimed at opportunity youth—defined as young adults between the ages of 16 and 24 who are not in school or in the workforce—offering career development support and access to training that helps them overcome barriers and achieve employment success.
- 2.3. **WORKFORCE SUPPORT.** Enhance workforce stability and productivity by addressing barriers to employment and ensuring access to essential resources for local talent. These efforts are complemented by the New

Employment Opportunities (NEO) program—a collaborative, subsidized employment initiative between the Fresno County Department of Social Services and Fresno County Economic Development Corporation—which connects residents facing barriers to employment with paid work experience and skill-building opportunities.

- 2.3.1. Increase the availability of affordable and accessible childcare options to support working parents and ensure they can maintain stable employment while meeting family needs.
 - Launch a childcare needs assessment and feasibility study to better understand needs and demands in Fresno County.
 - Ensure public, private, and nonprofit partners are included in outreach and discussions to understand the needs of employers.
 - Explore public-private partnership models to increase the number of childcare facilities in the County.
 - 2.3.2. Promote mental health awareness and work-life balance by encouraging businesses to offer flexible schedules and create supportive environments that prioritize employee well-being.
 - Coordinate with the Fresno County Department of Public Health, healthcare providers, and relevant nonprofits on programming and messaging.
 - 2.3.3. Expand access to fiscal and digital literacy training, especially for individuals who are considering entrepreneurship or expanding their business, by partnering with financial institutions, community organizations, and educational providers to offer workshops, mentorship programs, and accessible online resources.
- 2.4. TALENT ATTRACTION & RETENTION.** Develop a talent attraction campaign that emphasizes Fresno County’s unique opportunities and its commitment to creating an environment that supports long-term career growth.
- 2.4.1. Form a talent attraction and retention committee—comprised of members from the public, private, and nonprofit sectors—to guide the development and execution of talent-focused initiatives.
 - 2.4.2. Develop targeted marketing materials and digital campaigns that promote Fresno County’s competitive advantages—including success stories, career pathways, and lifestyle benefits—to attract skilled professionals and recent graduates.
 - Leverage the expertise of partners in the tourism marketing industry and human resources profession to develop materials.
 - 2.4.3. Partner with local employers to highlight job opportunities and career advancement potential, ensuring alignment with industry needs and economic development goals.
 - 2.4.4. Expand collaboration with postsecondary institutions—including universities, community colleges, and technical schools—to retain local graduates and connect them with in-demand careers.
 - 2.4.5. Establish relocation support services, including housing assistance and trailing spouse employment placement for critical occupations, to make Fresno County a more accessible and welcoming destination for new workers and their families.
- 2.5. COLLABORATION & COORDINATION.** Foster a collaborative ecosystem that brings together public, private, and nonprofit partners to align workforce development efforts, enhance industry-education connections, and ensure access to career opportunities across Fresno County.
- 2.5.1. Actively engage nontraditional partners, including community groups and local residents, to address workforce development needs in diverse and underserved populations.

- 2.5.2. Strengthen collaboration between postsecondary institutions and industry leaders to align educational curricula with the current and future needs of the local workforce.
 - Encourage cross-sector and cross-departmental collaboration, such as the ABE (Agriculture, Business, Engineering) program, to develop interdisciplinary training that equips students with diverse skill sets, fosters innovation, and ensures alignment with evolving industry needs.
- 2.5.3. Establish regional workforce advisory groups that include employers, educators, workforce development, and economic development partners to facilitate ongoing dialogue and responsiveness to labor market trends.

Objective 3. Infrastructure & Real Estate

Develop and enhance the real estate and infrastructure assets needed to support business growth and strengthen the regional economy.

- 3.1. **COMMERCIAL SITES.** Enhance the readiness and marketability of commercial sites by streamlining development processes, modernizing existing properties, and fostering mixed-use and flexible workspace solutions that support business attraction and expansion.
 - 3.1.1. Advance site planning and readiness efforts to ensure that commercial properties are development-ready, incorporating infrastructure improvements and streamlined permitting processes.
 - 3.1.2. Prioritize mixed-use developments that foster a vibrant business environment.
 - 3.1.3. Support the modernization of aging commercial buildings to improve their marketability and competitiveness.
 - 3.1.4. Expand coworking spaces, micro-offices, and makerspaces (such as Cultiva La Salud’s community kitchen) to provide flexible work environments and resources for entrepreneurs and small businesses.
- 3.2. **INDUSTRIAL SITES.** Expand industrial site availability and readiness through strategic inventory development, targeted infrastructure improvements, and the repurposing of underutilized properties to attract investment and support long-term economic growth. These efforts should be closely aligned with the *Fresno County General Plan*, which outlines long-term land use priorities and supports coordinated economic development across unincorporated areas.
 - 3.2.1. Develop a regional inventory of significant commercial and industrial sites, tiered by development readiness, to understand long-term supply and infrastructure needs.
 - Form a task force of public and private partners—including developers, engineers, and brokers—to assess barriers to site activation, infrastructure needs, and potential public-private solutions.
 - Document any zoning or permitting constraints that may impede site development.
 - 3.2.2. Repurpose vacant and underutilized properties, including those located in Opportunity Zones, to attract investment and maximize land use efficiency.
 - 3.2.3. Support the development of an intermodal facility to enhance freight movement, reduce transportation costs, and improve supply chain logistics for the agriculture and electronics distribution industries.
 - 3.2.4. Advocate for state and local reforms that streamline permitting, modernize the California Environmental Quality Act (CEQA) implementation, and evaluate the creation of flexible infrastructure cost-sharing tools to facilitate industrial development and job creation.

- 3.2.5. Advance planning for an inland port to strengthen regional logistics capacity and expand access to global trade networks that includes a Foreign Trade Zone designation.
 - 3.2.6. Inventory and assess underutilized airfields and rural airstrips for their potential to support modern aviation users—including electric vertical takeoff and landing (eVTOL) aircraft, autonomous systems, precision agriculture, and advanced logistics—leveraging the region’s aerial assets and proximity to expansive agricultural land.
 - 3.2.7. Explore the use of tax increment financing (TIF) or similar district-based financing tools to support infrastructure improvements and site readiness for priority industrial developments, with a focus on catalyzing investment in underutilized or strategic locations.
- 3.3. UTILITIES.** Develop resilient infrastructure systems that ensure reliable and sustainable water, electric, and broadband services to support economic and community growth.
- 3.3.1. Enhance water resource management through conservation strategies, infrastructure upgrades, and innovative reuse initiatives.
 - 3.3.2. Encourage investments to upgrade the region’s electric infrastructure to improve reliability, integrate renewable energy sources, and accommodate future demand.
 - 3.3.3. Explore behind-the-meter options with alternative energy providers, including utility-grade solar installations and other renewable energy solutions. Prioritize technologies and business models that promote local value capture, such as hydrogen production facilities or data centers co-located with solar assets, to drive job creation, increased tax revenue, and technological advancement in the local economy.
 - 3.3.4. Ensure balanced deployment of broadband infrastructure to bridge the digital divide, support business growth, and enhance workforce development opportunities through a coordinated approach.
 - Implement and build on Fresno Coalition for Digital Inclusion (FCDI) broadband initiatives and strategies, revisiting and updating actions as needed.
 - 3.3.5. Advocate for strategic enhancements to the Pacific Gas and Electric Company (PG&E) Economic Development Rate program—including expanded eligibility for qualified family-owned retail businesses, increased rate discounts, and the inclusion of natural gas schedules alongside electric rates—to better support small business growth and competitiveness.
 - 3.3.6. Identify opportunities to integrate renewable hydrogen production into the region’s agricultural processing, cold storage, and goods movement sectors, supporting decarbonization and attracting new investments in sustainable logistics.
- 3.4. CONNECTIVITY.** Improve regional mobility and economic access by expanding public transit, enhancing highway and rail infrastructure, and supporting the growth of Fresno Yosemite International Airport as a transportation hub.
- 3.4.1. Leverage high-speed rail investments to improve regional and statewide mobility, reduce congestion, and support economic development.
 - 3.4.2. Support investment in public transit networks within the County to expand access to employment centers, services, and educational institutions.
 - Improve transit accessibility across the region by expanding public transportation options, ensuring workers can commute reliably to and from their job.

- 3.4.3. Invest in interstate and highway improvements, including existing county-wide roadway improvements, to strengthen regional connectivity, support freight movement, and improve traffic flow.
- 3.4.4. Ensure regional coordination on infrastructure projects that cross jurisdictional lines or those that have the potential to extend beyond a specific jurisdiction. Coordination efforts should include alignment with the City of Fresno, as well as neighboring counties.
- 3.4.5. Support the Fresno Yosemite International Airport’s expansion project ([FATforward](#)), which will increase passenger and cargo capacity and strengthen global connections.

Objective 4. Quality of Place

Elevate the region’s quality of place by creating vibrant, resilient communities that attract talent and visitors and support local businesses.

- 4.1. **HOUSING.** Support affordable, diverse, and sustainable housing development in Fresno County to support workforce growth, attract new residents, and drive long-term economic vitality.
 - 4.1.1. Expand and diversify the housing stock by leveraging financial tools, zoning adjustments, and public-private partnerships to support the development of attainable housing options that meet the needs of a growing workforce.
 - 4.1.2. Encourage housing development near commercial centers to improve access to jobs, reduce transportation challenges, and align residential growth with employment hubs.
 - 4.1.3. Strengthen pathways to homeownership by promoting financial literacy programs, supporting down payment assistance initiatives, and encouraging diverse housing options that accommodate first-time and moderate-income buyers.
- 4.2. **DOWNTOWNS.** Strengthen the vitality and development of downtowns, central business districts, and Main Streets across Fresno County.
 - 4.2.1. Support in-fill and transit-oriented development to maximize land use efficiency, enhance walkability, and strengthen commercial corridors.
 - 4.2.2. Enhance storefronts through beautification programs that improve aesthetics, attract customers, and support local businesses.
 - Identify public and private funding streams to finance revitalization efforts.
 - 4.2.3. Attract amenities to downtowns and commercial corridors that serve businesses and visitors, strengthening economic activity and vibrancy.
 - 4.2.4. Implement [Complete Streets](#) initiatives to improve accessibility, safety, and multimodal transportation options.
- 4.3. **COMMUNITY IDENTITY.** Preserve and promote the authenticity of the community by supporting local culture, historic assets, and unique public spaces that strengthen identity and sense of place.
 - 4.3.1. Activate public spaces by supporting events, placemaking efforts, and infrastructure improvements that foster community engagement.
 - 4.3.2. Increase awareness of regional tourism assets that also enhance the quality of place for businesses and residents.

- 4.3.3. Amplify the region’s agritourism industry to include events and venues—such as farmers’ markets, wineries, and farm-to-table initiatives—that highlight local food systems and support rural economies.
- 4.3.4. Develop a coordinated regional marketing narrative that unifies messaging and strengthens external perceptions of the region.
- 4.3.5. Evaluate the possible creation of a transient occupancy tax (TOT) countywide to generate additional revenue for economic development initiatives, infrastructure improvements, and community services.
 - This assessment should include an analysis of the fiscal impact, potential revenue generation, and competitive positioning relative to neighboring counties. Engage stakeholders, including local governments, lodging operators, and business leaders, to understand potential benefits and challenges. Additionally, explore options for structuring the TOT to support targeted investments, such as workforce housing, tourism infrastructure, and business development programs.

4.4. GREENSPACE. Integrate greenspaces into current and future developments to enhance recreation, connect popular destinations, and support sustainable development through parks, trails, and non-motorized corridors.

- 4.4.1. Expand parks and micro greenspaces to provide accessible recreation and environmental benefits in urban and commercial areas.
 - Use tools like ParkServe² to identify areas where the development of parks and connected trail systems could increase access for residents.
 - Leverage tools such as the National Recreation and Park Association’s [Green Infrastructure in Parks](#) guide, which outlines best practices for utilizing trees, native plants, bioswales, and other sustainable infrastructure in greenspaces.
- 4.4.2. Connect areas of interest by extending trail systems to improve mobility and enhance outdoor recreation opportunities.
- 4.4.3. Leverage regional outdoor recreation assets—including Sequoia, Kings Canyon, and Yosemite National Parks—to support economic development and environmental stewardship.
- 4.4.4. Develop non-motorized corridors that improve connectivity and encourage alternative transportation options.

² ParkServe® is a free mapping platform developed by the Trust for Public Lands, which can be used to inform park planning, including statistics on the population living within a 10-minute walk.

Evaluation Framework

Tracking progress on the implementation of the CEDS is essential to ensuring its success. Fresno County's evaluation framework includes both broad indicators of regional economic health and targeted metrics that align with the specific objectives outlined in this plan. Community indicator metrics, or baseline CEDS performance metrics, will use publicly available national and state data sources, enabling Fresno County to measure progress over time and benchmark against peer and aspirational regions. These baseline indicators, outlined in Figure 3, will help assess the County's economic competitiveness and identify areas for improvement. Where possible, all data will be disaggregated by factors such as industry, geography, and demographic characteristics to ensure a comprehensive understanding of economic trends.

Beyond these broad indicators, strategic action metrics will be identified and refined throughout the CEDS implementation process. Figure 4 provides initial examples, but as strategies and actions are executed, additional metrics will be incorporated to reflect emerging priorities and opportunities. Given the five-year scope of this plan, not all metrics will be tracked from the outset, and some may require additional resources to measure effectively. This flexible approach allows for adjustments based on evolving economic conditions and the availability of data.

This evaluation framework will support transparent reporting on Fresno County's economic development progress and provide a tool for assessing whether strategies are delivering the intended outcomes. The Fresno County Economic Development Corporation will maintain an online CEDS dashboard to track key metrics, share updates on implementation, and provide information on upcoming Strategy Committee meetings.

Figure 3. Baseline CEDS Performance Metrics

Indicators of general community health and progress

TOPIC	EXAMPLES
Demographics	Population trends, age structure, gender, ethnic and racial diversity
Socioeconomics	Per capita income, median household income, poverty rate, educational attainment
Housing	Home values, mortgage/rent burden, mortgage equity, homeownership by race, new housing construction
Workforce	Civilian labor force, unemployment rate, median wage, commuting patterns
Industry	Job growth (all industries), target industries (location quotient, ³ firm growth, employment), new business establishments
Other	Air travel trends, lodging data/visitor spending, air/water quality

Figure 4. Strategic Action Metrics

Indicators of progress on CEDS implementation

CEDS OBJECTIVES	SAMPLE METRICS
Objective 1: Business Growth	Create a framework for CBAs and track the number of CBAs executed
Objective 2: Workforce Development	Track the number of career awareness events in the County
Objective 3: Infrastructure & Real Estate	Develop a site inventory framework and criteria
Objective 4: Quality of Place	Track progress toward Complete Streets initiatives

Source(s): TIP Strategies, Inc., both figures this page.

³ Location quotients (LQs) measure local employment concentration in a given industry relative to the nation. LQs greater than 1.00 indicate the region has a higher concentration of the industry than the nation. LQs equal or near to 1.00 indicate a concentration of industry employment in the region that is similar to the nation. LQs less than 1.00 indicate the region has a lower concentration of the industry than the nation.

Summary Background

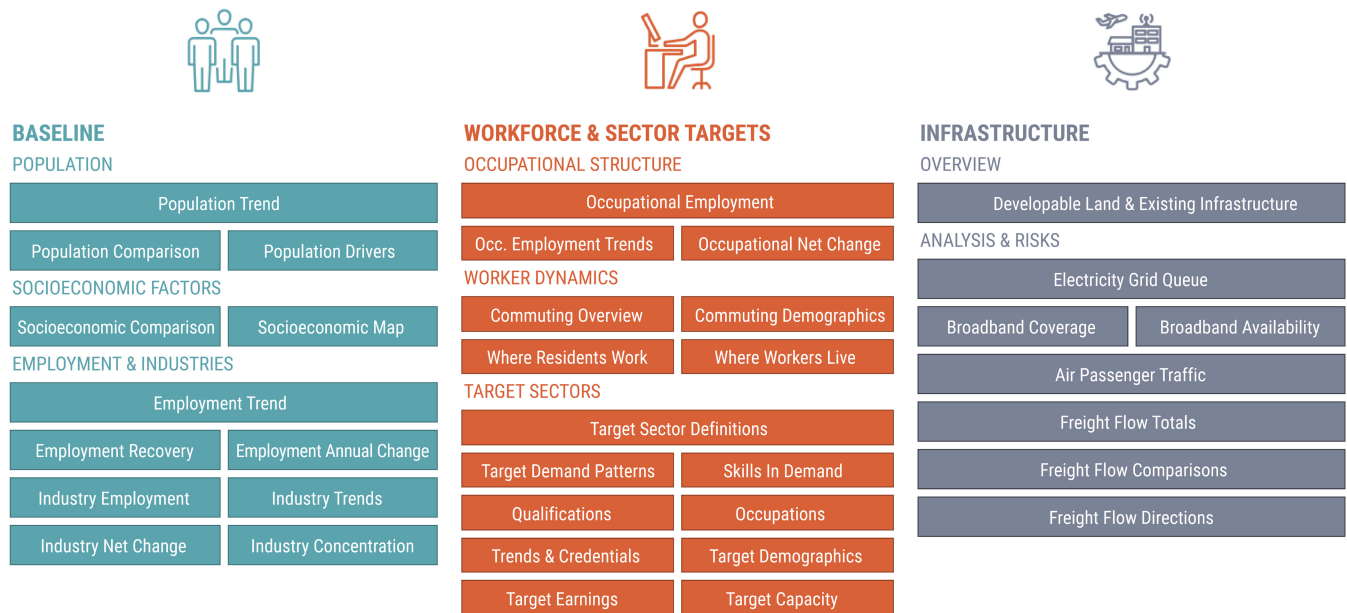
This section offers an overview of Fresno County’s economic situation, including its population, industry clusters, and cultural and physical assets. The narrative is based on insights gleaned from the consulting team’s quantitative and qualitative work carried out as part of the preparation of the CEDS. It concludes with a summary of the SWOT analysis that emerged from this process.

Planning Context

To build a foundation for the engagement, TIP conducted a strategic analysis of Fresno County’s competitive position. This extensive quantitative analysis included comparisons to the state of California and the US, along with a selection of peer communities within and outside of California. Initial data collection began in June 2024, during TIP’s discovery phase, and the analytical work continued into the final phase of the engagement.

The *Fresno County CEDS Strategic Analysis* was delivered as an interactive data visualization which can be accessed [online](#). Key findings from this analysis, including visualizations of the data in the CEDS Strategic Analysis (the menu of which is shown in Figure 5), can be found throughout the Regional Overview section.

Figure 5. Menu of the Interactive Deliverable



See Appendix B for full description of Figure 5.

Source(s): TIP Strategies, Inc.

Findings from the quantitative analysis were validated and refined through a robust stakeholder engagement process, illustrated in Figure 1 (page 2). The CEDS Strategy Committee played a central role in ensuring broad and diverse participation by identifying individuals and organizations who could provide valuable insights into the challenges and opportunities shaping the CEDS. The cornerstone of this effort was a series of roundtable discussions designed to gather input from a diverse group of regional leaders and industry experts. These group sessions were organized around existing and emerging industries, broader economic issues, and programmatic priorities. The roundtable discussions were supplemented with one-on-one interviews to capture perspectives that may not have emerged in a larger setting. Furthermore, community meetings were held in each of the 15 incorporated cities within the planning region, along with additional sessions in rural areas to capture perspectives from stakeholders in unincorporated Fresno County. Over 200 individuals were engaged through roundtables, meetings, workshops, and interviews.

A public survey allowed community members to contribute feedback at their convenience, helping shape the CEDS without the constraints of scheduled meetings. More than 600 responses were collected through a community vision survey, reflecting input from a wide cross-section of the population. A targeted digital outreach campaign helped expand participation, particularly through social media. Survey data was analyzed across different demographic and geographic groups, with the findings informing the development of the CEDS vision statement. Additional details about the 2025 Community Vision Survey are provided on page 32.

In addition to the visioning survey, the Fresno County Economic Development Corporation, in partnership with *The Business Journal*, hosted a virtual community workshop, where members of the public were invited to provide feedback on the draft CEDS framework. Participants were given the opportunity to review the draft SWOT analysis and identify priorities for the CEDS. The workshop concluded with a question-and-answer session, as well as information on next steps, including how to review and submit feedback on the draft CEDS during the 30-day public comment period.

Regional Overview

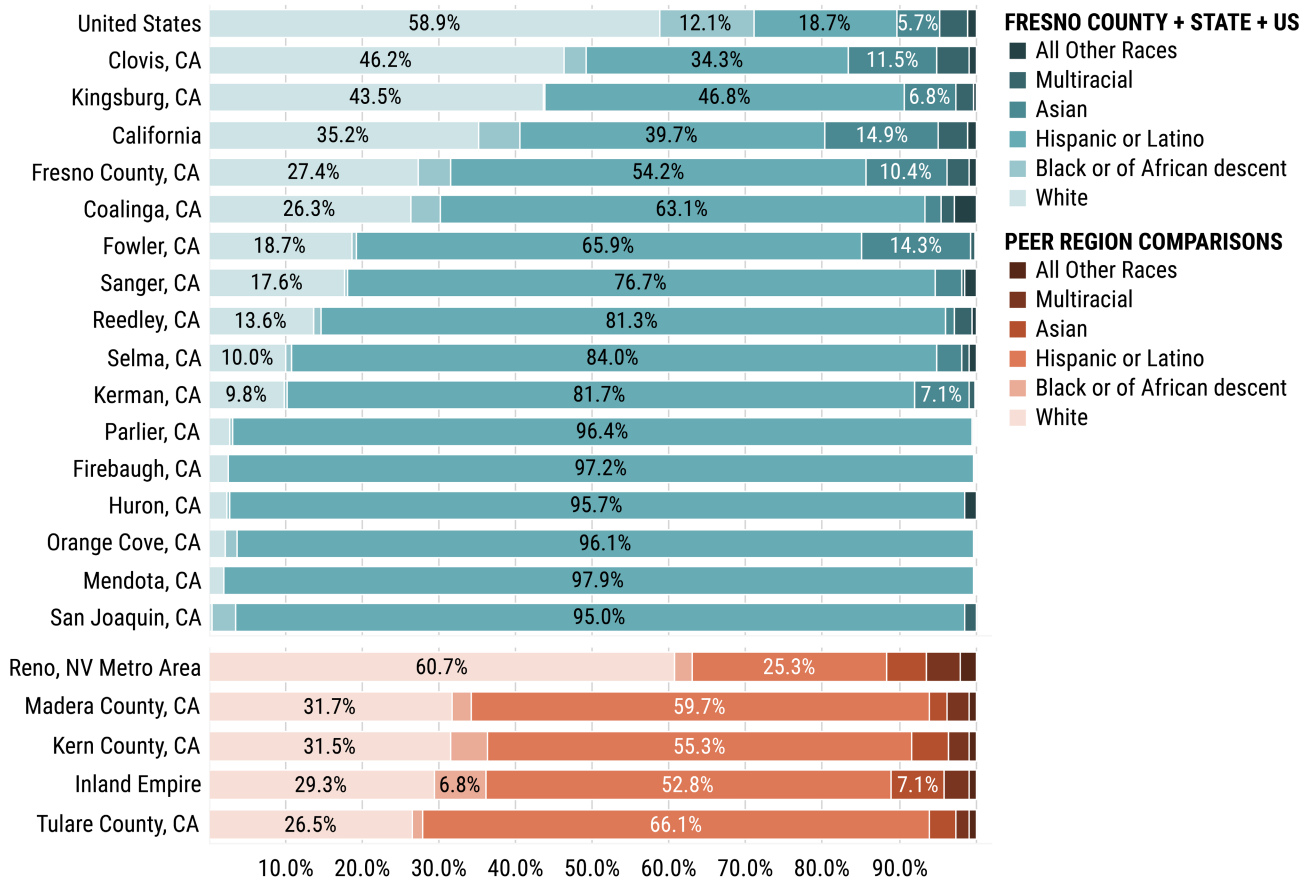
Understanding Fresno County's characteristics, cultural assets, infrastructure systems, and economic conditions is an essential component of the CEDS planning process. This section draws on the data analysis and outreach efforts to examine characteristics that are relevant to the County's economic development efforts and that influence its past trends, future opportunities, and potential challenges. Findings from this overview are reflected in the SWOT analysis and are integrated in the Strategic Action Plan.

Demographic and Socioeconomic Characteristics

The total population of Fresno County has risen steadily over the past three decades, with the County adding nearly 345,000 new residents since 1990—a more than 50 percent increase in population. However, the pace of this growth has gradually slowed, with a notable change in upward trajectory after the 2020 US Census. Natural change remains a large component of Fresno County's population growth despite a declining fertility rate nationwide. At the same time, international migration, historically a major driver of local population change, has similarly waned, reflecting a long-term national pattern. Domestic net migration can be the most volatile component of population change, with shifting push and pull factors translating into prolonged periods of population increase or decrease. Fresno County's spikes in domestic out migration since 1990 largely reflect statewide trends, with California beginning to see declining population numbers at the state level in recent years.

More than one-half of Fresno County’s residents are Hispanic or Latino. In several of the County’s municipalities, this figure is over 95 percent. More than one-quarter of County residents are non-Hispanic White, while the remaining population represents a mix of backgrounds including Asian, Black or of African descent, Multiracial, and others (Figure 6, page 17). Just under one-half of the County’s residents speak a language other than English at home, primarily Spanish. In several municipalities, Spanish is spoken at home by more than 80 percent of residents. The County is relatively young, with most residents under the age of 35. Three out of every ten residents are under the age of 20.

Figure 6. Race & Ethnicity Comparisons, 2022



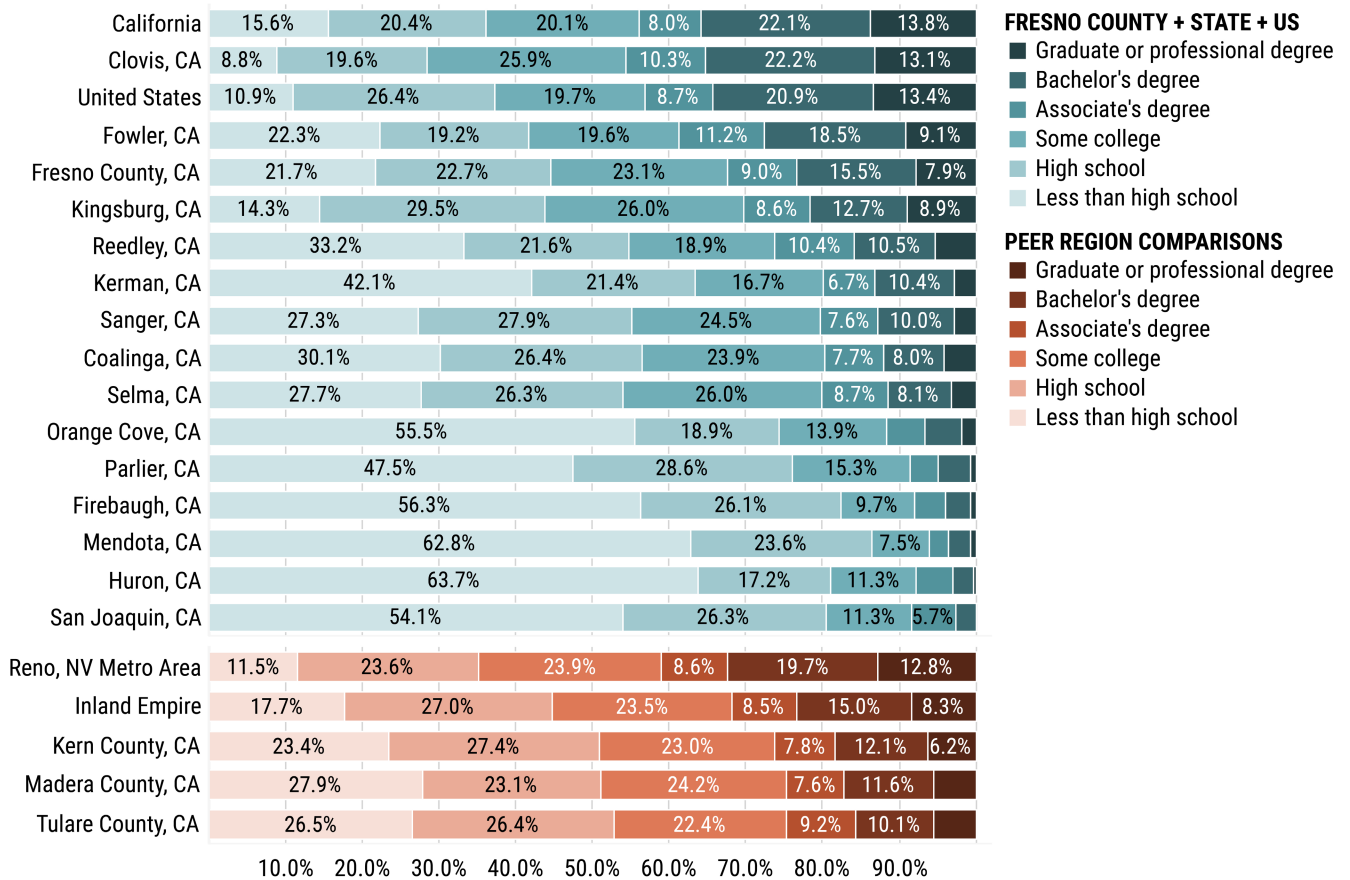
[See Appendix B for full description of Figure 6.](#)

Source(s): 2022 American Community Survey (ACS) 5-year sample; TIP Strategies, Inc.

Note(s): The US Census Bureau categorizes Hispanic or Latino as an ethnic group rather than a race. The Hispanic or Latino group includes all races; the remaining racial groups exclude Hispanics or Latinos. All other races includes Native Americans, Alaska Natives, Pacific Islanders, multi-racial persons, and all other racial or ethnic identities not specified. These data are based on self-identification and reflect a social definition of race/ethnicity. The Riverside–San Bernardino–Ontario MSA is informally referred to as the Inland Empire.

While more than one-third of US residents over the age of 25 have a bachelor’s degree or higher, less than one-quarter of Fresno County’s residents have completed a four-year degree. Around one in ten US residents have an education below the high school level; this figure is doubled for Fresno County. In several of the County’s cities, most residents do not possess a high school diploma or equivalent (Figure 7, page 18). Continuing to develop the local workforce through enhanced career pathways and upskilling opportunities for students and existing workers will help connect residents to higher-wage opportunities and support Fresno County’s ability to capitalize on emerging opportunities in local industries with strong growth potential.

Figure 7. Educational Attainment, 2022



See Appendix B for full description of Figure 7.

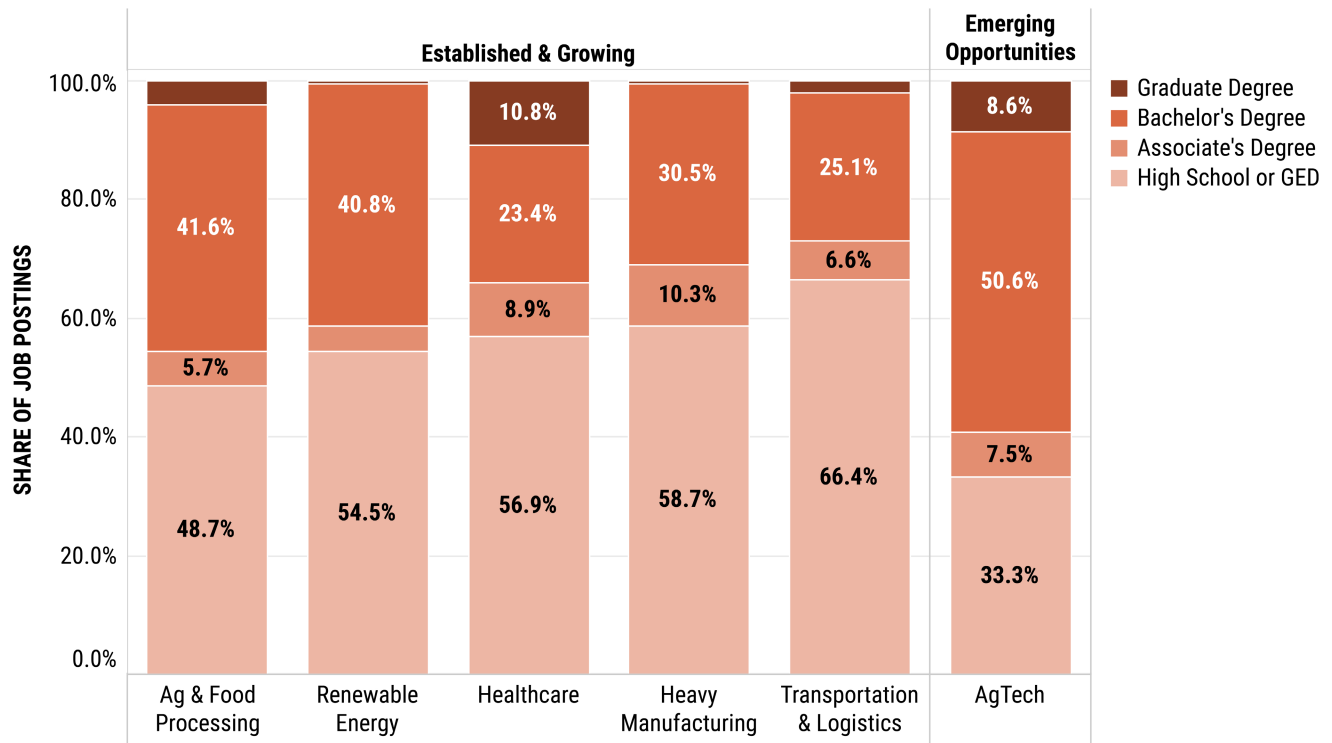
Source(s): 2022 American Community Survey (ACS) 5-year sample; TIP Strategies, Inc.

Note(s): Educational attainment only measured for population 25 and older. High school includes equivalency. Some college indicates no degree was received. Graduate degree includes professional degrees and doctoral programs. The Riverside–San Bernardino–Ontario MSA is informally referred to as the Inland Empire.

In support of these objectives, TIP conducted an analysis of two years of job postings in target industries. Five of Fresno County’s six targets represent established industry clusters that already have a presence in the local economy, including Agriculture & Food Processing, Healthcare, Heavy Manufacturing, Renewable Energy, and Transportation & Logistics. The remaining target industry, AgTech, represents an emerging cross-sector field that can allow Fresno County to leverage both its strong agricultural economy and innovation spurred by the County’s universities and its local entrepreneurs. This emerging sector was defined by local, regional, and national employers that most exemplify growth opportunities.

Many top target industry occupations do not require a bachelor’s degree and represent potential jobs for much of the County’s workforce. In fact, there are multiple top 10 occupations for each target industry that typically require neither a college degree nor any related work experience (Figure 8, page 19). By supporting growth in these industry sectors, fostering both local business development and firm attraction, the County can diversify its industrial strengths while providing residents with career pathways into expanding fields. This approach can both encourage a countywide culture of innovation and connect residents to higher-wage opportunities.

Figure 8. Target Industry Qualifications, Minimum Education Requested
 Based on an analysis of two years of job postings, October 2022–September 2024



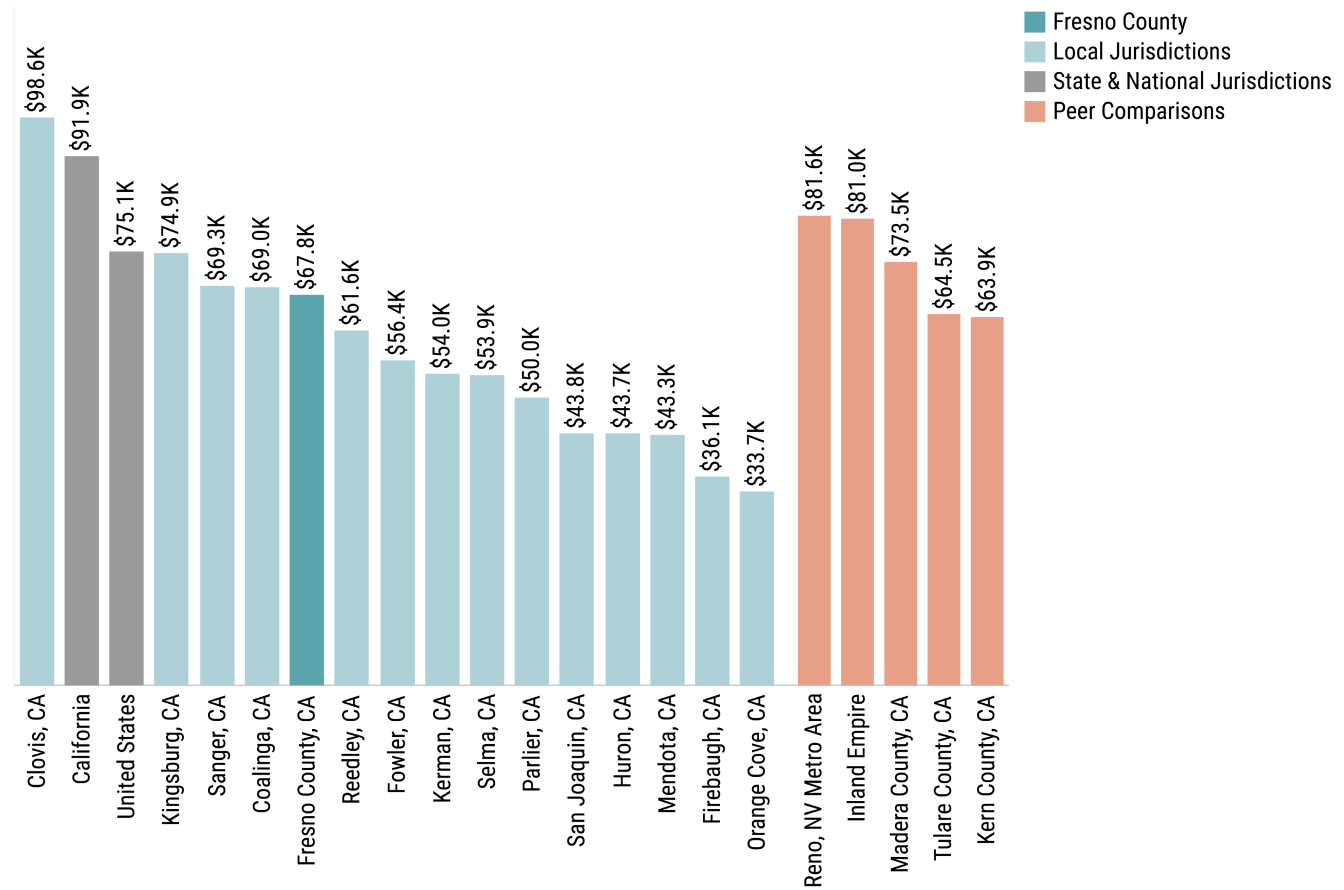
[See Appendix B for full description of Figure 8.](#)

Source(s): US Bureau of Labor Statistics (BLS); Lightcast 2024.2–QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Note(s): Job postings include non-staffing, unique, newly posted job postings for full-time, part-time, and flexible positions, excluding internships, in Fresno County, California, or the US between October 2022-September 2024.

California’s median household income sits well above the national median (and that of 45 other US states), but Fresno County’s median income is well below both the state and national figures. Clovis is the only city within Fresno County with a median household income above the national figure (Figure 9, page 20). The County also demonstrates a poverty rate that is higher than that of both the state and the nation; nearly one in five residents live below the poverty line. As the County pursues target industry business expansion and retention, and the cultivation of entrepreneurial and workforce development opportunities, it can raise the income of its residents by equipping workers for higher-wage opportunities. Additionally, pursuing diversified housing options, strengthening utility infrastructure, and connecting residents to employment and recreation opportunities through expanded active transportation and transit options will enable the County to provide better long-term support for its low-income residents.

Figure 9. Median Household Income, 2022
In thousands



[See Appendix B for full description of Figure 9.](#)

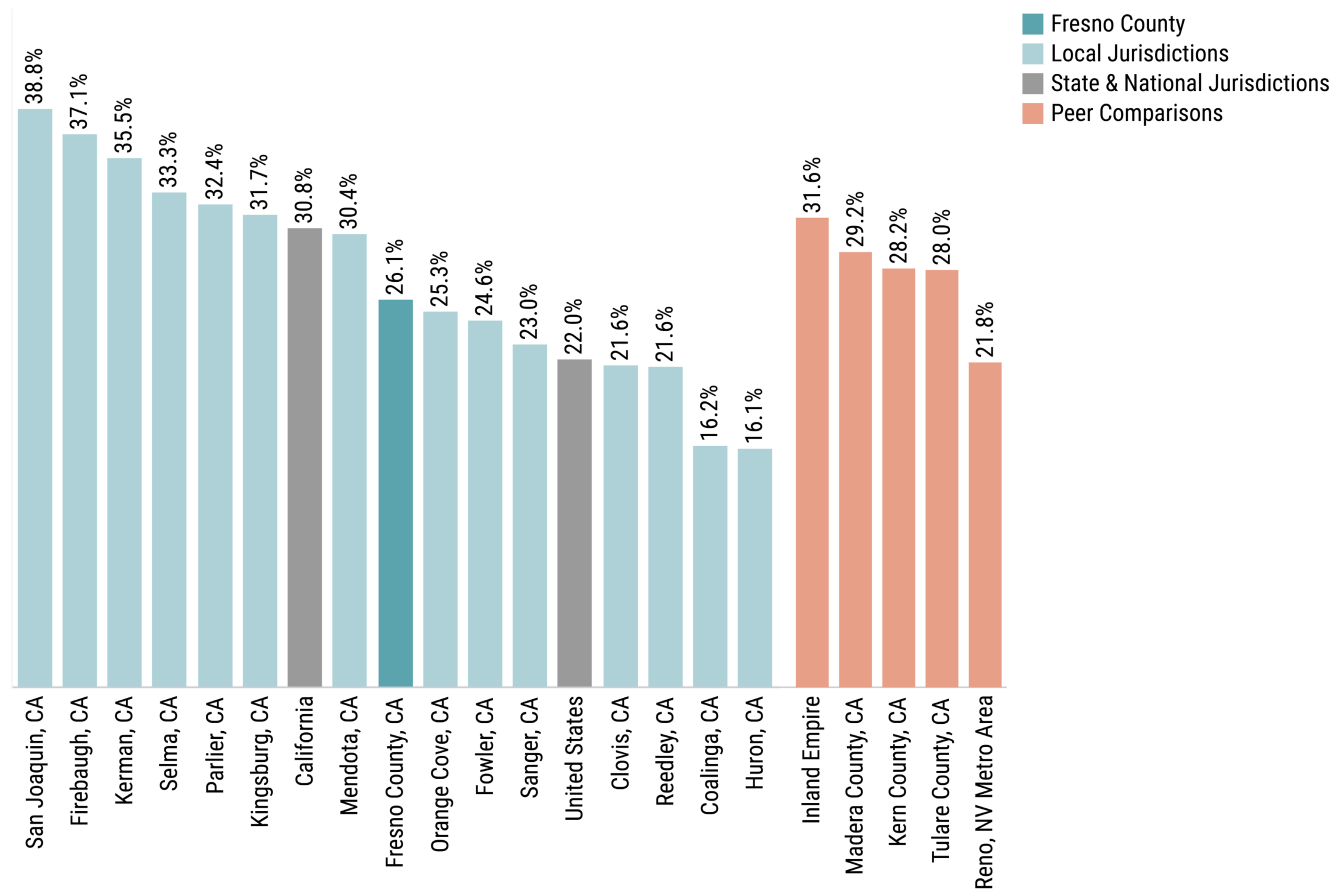
Source(s): 2022 American Community Survey (ACS) 5-year sample; TIP Strategies, Inc.

Note(s): The Riverside–San Bernardino–Ontario MSA is informally referred to as the Inland Empire.

The median value of owned homes within Fresno County (\$338,200) falls well below the statewide figure (nearly \$659,300). More than 40 percent of the County’s owned homes are valued below \$300,000. This figure climbs as high as 90 percent for two municipalities, Parlier and Mendota. These relatively low home values make housing more affordable within the County than statewide; however, homeownership remains unaffordable for many residents due to low household income. More than one-quarter of residents are housing-cost burdened, meaning these homeowners spend 30 percent or more of their income on housing costs (Figure 10, page 21). For those who rent, countywide housing costs (with a median monthly rent of just over \$1,200) are again more affordable than statewide (nearly \$1,900). Renters occupy more than four in ten housing units countywide. Multifamily properties represent just one-quarter of the County’s housing units, suggesting a high share of rented single family properties. As with homeowners, many renters in the County are housing-cost burdened; 54.4 percent of renters spend more than 30 percent of their income on housing costs, a figure that is identical to the statewide rate.

Figure 10. Housing-Cost Burdened Owners, 2022

Share of households spending 30 percent or more of income on housing costs



[See Appendix B for full description of Figure 10.](#)

Source(s): 2022 American Community Survey (ACS) 5-year sample; TIP Strategies, Inc.

Note(s): Only includes households where housing cost and household income can both be determined. The Riverside–San Bernardino–Ontario MSA is informally referred to as the Inland Empire.

Environment, Geography, and Climate

Centrally located in the San Joaquin Valley, Fresno County is in close proximity to major metropolitan areas. Just three hours from Los Angeles and San Francisco, five from Reno, and six from Las Vegas, it is the gateway to some of the West Coast’s most densely populated urban areas.

The County’s approximately 6,000 square miles make it the sixth largest in California.⁴ Its topography is varied, with elevation ranging to 14,000 feet in the Sierra Nevada to 100 feet in the valley floor. The result is a wide range of climates that lend themselves well to a variety of industries.

The climate in Fresno County is primarily mediterranean, with hot, dry summers, and cool winters. The average temperature ranges from the 40s°F in the winter to the high 80s°F in the summer. The valley receives about 10 inches of rain per year on average, conditions that make it ideal for agriculture⁵.

⁴ [US Census Bureau, Quick Facts.](#)

⁵ [National Oceanic and Atmospheric Administration, Monthly Climate Normals \(1991-2020\), Fresno Area, CA.](#)

Fresno County temperatures have caused the region to have an elevated risk of drought and wildfires. The region is particularly vulnerable to wildfires, as demonstrated by the 2020 Creek Fire, which burned over 379,000 acres and caused more than \$500 million in damages across Fresno and Madera Counties. The fire disrupted businesses, displaced communities, and severely damaged County-owned infrastructure, including roads and bridges, highlighting the ongoing threat that climate poses to the region's economy and public assets.

Cultural Assets

Throughout the year, Fresno County comes alive with a variety of events and festivals that celebrate its unique identity. Signature events include the Blossom Trail, which highlights the County's agricultural heritage with scenic tours of blooming orchards, and the Rogue Festival, a grassroots arts festival that showcases independent performers and creators. The Clovis Rodeo and the Parlier Roundup Festival are long-standing traditions that blend the area's Western roots with modern entertainment, while the Big Fresno Fair offers a mix of agricultural exhibitions, live music, and family-friendly activities, drawing over 600,000 attendees from across the Central Valley and beyond. The Reedley Fiesta brings the community together with a vibrant mix of parades, cultural performances, and local vendors, reflecting the city's rich history and spirit. Every December, the Kingsburg Santa Lucia Celebration honors Swedish heritage with festive traditions, music, and the iconic candlelit procession, adding to the region's diverse cultural calendar. The year concludes with the Hmong New Year Festival, the Central Valley's largest celebration of Hmong culture, featuring traditional music, dance, cuisine, and ceremonial displays.

Fresno County boasts a vibrant arts scene, supported by organizations such as the Valley Performing Arts Council, Fresno Grand Opera, and the Fresno Philharmonic Orchestra. The city of Fresno serves as a cultural hub, drawing visitors from across the region with its rich artistic offerings and major venues, including the Fresno Convention & Entertainment Center, Save Mart Center, Saroyan Theatre, Tower Theatre, and Warnors Theatre. These spaces host a wide range of live performances, large-scale events, and community gatherings, enriching the County's dynamic cultural landscape. While many performing arts venues are concentrated within the city limits of Fresno, smaller communities also contribute to the region's artistic vitality. Intimate venues such as the Clovis Veterans Memorial District Auditorium, the Selma Arts Center, and the Reedley Opera House provide spaces for local repertory companies, while organizations like the Sunshine Theatre in Coalinga and the Sanger High School Apache Theatre adapt multipurpose spaces at schools and community centers to bring performances to their communities. This diverse network of venues and organizations ensures that residents across Fresno County have access to cultural experiences that celebrate local talent and creativity.

In addition to performing arts, Fresno County is home to several museums that highlight its diverse cultural and historical heritage. The Fresno Art Museum showcases contemporary and modern art, while the Fresno Discovery Center offers interactive, science-based exhibits for young learners. The Fresno County Historical Museum preserves the region's past, and the African American Historical & Cultural Museum honors the contributions of African Americans. Arte Américas, the largest Latino cultural center in the Central Valley, celebrates Latino art, music, and history, fostering cultural appreciation. Beyond the city of Fresno, local museums such as the Clovis Museum, the Historic Kingsburg Depot, and the Reedley City Museum offer insights into the unique histories of their respective communities.

Fresno County's varied topography makes it a prime destination for outdoor enthusiasts. The County is home to Sequoia National Park and Kings Canyon National Park, which attract hundreds of thousands of visitors each year. Additionally, Yosemite National Park is just a short drive away, making Fresno County an ideal base for travelers exploring the region. The County offers year-round activities, including hiking, cycling, skiing, and water sports, while China Peak Mountain Resort offers winter recreation such as skiing and snowboarding. Mountain biking trails wind through the Sierra National Forest, catering to riders of all skill levels. New investments in local parks, such as the splash pad at Heritage Park in Parlier, enhance recreational opportunities with playgrounds, picnic areas, and sports

fields. Trails like the Clovis Dry Creek Trail, the San Joaquin River Trail, and the Lewis S. Eaton Trail provide scenic routes for walking, jogging, and cycling, promoting outdoor activity and community well-being. The Kings River and San Joaquin River provide excellent settings for kayaking and canoeing, allowing enthusiasts to explore the region's natural beauty. Inland lakes such as Shaver Lake and Hume Lake are popular destinations for non-motorized boating, swimming, and fishing, offering serene environments for various water activities.

Infrastructure Systems

Fresno County's central location in the San Joaquin Valley (the southern half of the Central Valley) positions it as a main connector between major metropolitan areas along the California coast and in Nevada. The County is traversed by two primary transportation corridors: Interstate 5, which runs along the western portion of the County and serves as a major north-south artery linking Los Angeles and San Francisco, and State Route 99, which passes through the city of Fresno and connects the County to Sacramento. These highways are critical trade corridors, reinforcing Fresno County's role as a logistics hub. Other important routes include State Route 41, which connects the coast to Yosemite National Park, and State Route 180, which runs east-west from Mendota to Kings Canyon National Park.

Fresno Yosemite International Airport serves as an indispensable transportation asset for residents, businesses, and tourists. While passenger traffic fluctuates seasonally—peaking in the summer and during the holiday months—the airport continues to expand its services and infrastructure.

The County is also served by two major freight rail lines, Union Pacific and Burlington Northern Santa Fe (BNSF). Passenger rail is currently provided by Amtrak, which operates a station in the city of Fresno. The development of the California High-Speed Rail (HSR) network is expected to further enhance regional connectivity. Downtown Fresno has been designated as a primary location in the project's first phase, with a station set to open in the city, followed by a station in Bakersfield.

Fresno County plays a vital role in California's energy and water infrastructure. The County's extensive network of canals, reservoirs, and recharge basins is essential for water storage and distribution. Yet, much of this infrastructure requires upgrades to meet evolving water supply challenges.

The Sustainable Groundwater Management Act (SGMA) introduced a framework for water management, requiring the formation of Groundwater Sustainability Agencies (GSAs). These agencies are responsible for developing Groundwater Sustainability Plans (GSPs) to restore and maintain balanced groundwater levels. While the SGMA aims to create long-term water stability, compliance can be complex and resource-intensive for local governments and stakeholders.

To address groundwater depletion, agencies within Fresno County have initiated several large-scale recharge projects. These include the and the Elkhorn Groundwater Recharge Basins, which enhance the region's ability to replenish aquifers, and the planned Upper Kings Groundwater Resiliency Project, which will expand groundwater storage and management efforts. While these initiatives outline a path forward, securing funding for water projects remains a top priority.

Innovative solutions will be necessary to address ongoing water challenges. Institutions such as Fresno State's Water, Energy and Technology (WET) Center are at the forefront of research and development in sustainable water management practices.

In recent years, Fresno County has emerged as a major contributor to California's renewable energy sector, particularly through the development of large-scale solar farms. Despite the County's increased energy production, residents and businesses continue to face high electricity costs.

Delays in interconnecting new solar projects to the power grid pose significant challenges. The interconnection application process can be protracted, sometimes extending up to seven years, leading to a backlog of projects awaiting approval. These interconnection challenges not only hinder the timely deployment of renewable energy projects but also affect the establishment of new industrial facilities and businesses in the County. Efforts to streamline the interconnection process are crucial for maximizing the benefits of Fresno County's renewable energy initiatives and supporting economic development in the region.

While Fresno County has made progress in expanding broadband access, challenges persist, particularly in rural and unincorporated areas. In some areas, internet speeds remain low, rendering broadband effectively inaccessible. A lack of competition among providers also drives up costs, making service unaffordable for many households. Additionally, barriers such as limited access to digital devices and low digital literacy rates further compound disparities.

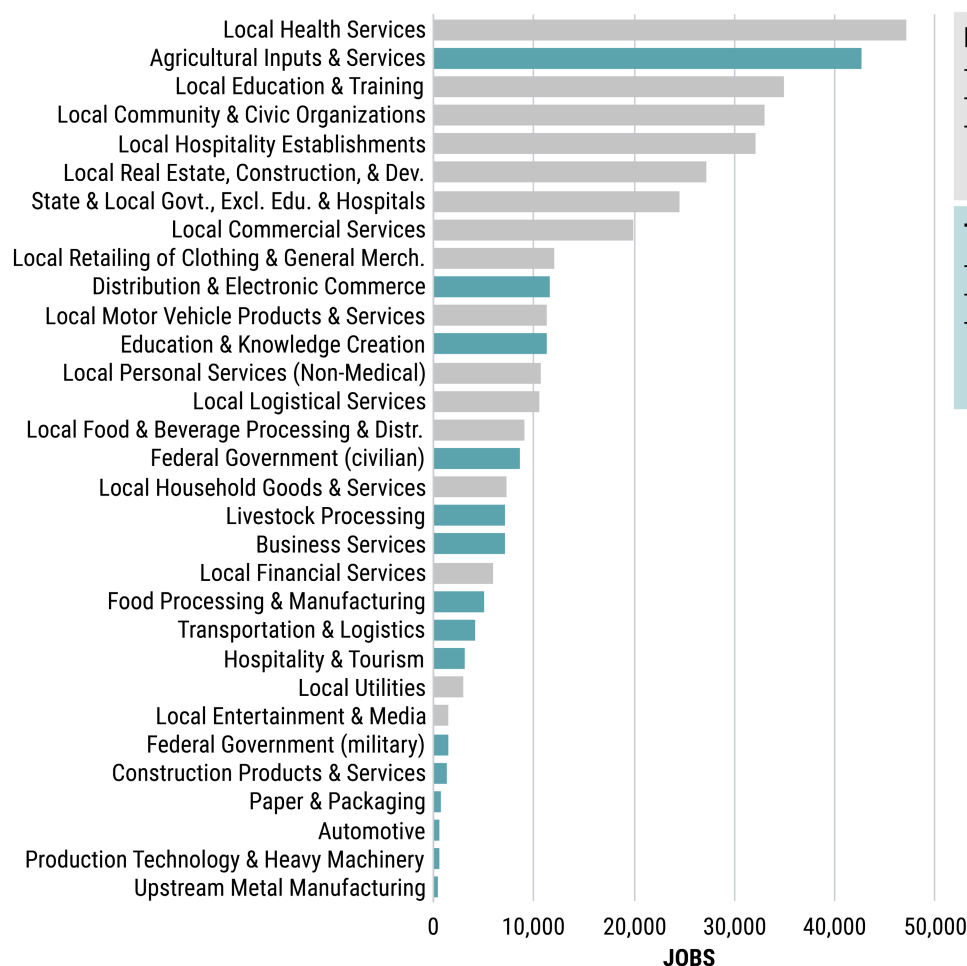
The FCDI and other regional plans include broadband expansion plans to address these issues, with an estimated \$320 million investment needed to improve connectivity across the County. Efforts to close the digital divide will be critical in ensuring that all residents and businesses can fully participate in the modern economy.

Industry Clusters

As with communities across the country, major employers in Fresno County include hospitals, primary and secondary schools, restaurants, social services, and retailers. The need for these essential amenities within the community has grown as the County's population has increased. Local Health Services is Fresno County's largest sector by employment, representing more than 11 percent of all jobs countywide (Figure 11, page 25). This sector has grown steadily from 30,000 to more than 50,000 jobs since 2001. Another local cluster, Local Community & Civic Organizations, the County's fourth largest cluster by employment, has seen a rapid increase in jobs. Since its employment growth began in earnest around 2012, this cluster has added more than 25,000 jobs.

Figure 11. EDA Industry Clusters, Job Count

Fresno County, California, employment by industry cluster, 2023



LOCAL CLUSTERS

- Primarily serve local markets
- Present in virtually every market
- Location is not dependent upon competitive advantage

TRADED CLUSTERS

- Serve outside markets
- Free to choose where they locate
- Tend to be highly concentrated in few regions that have specific advantages

[See Appendix B for full description of Figure 11.](#)

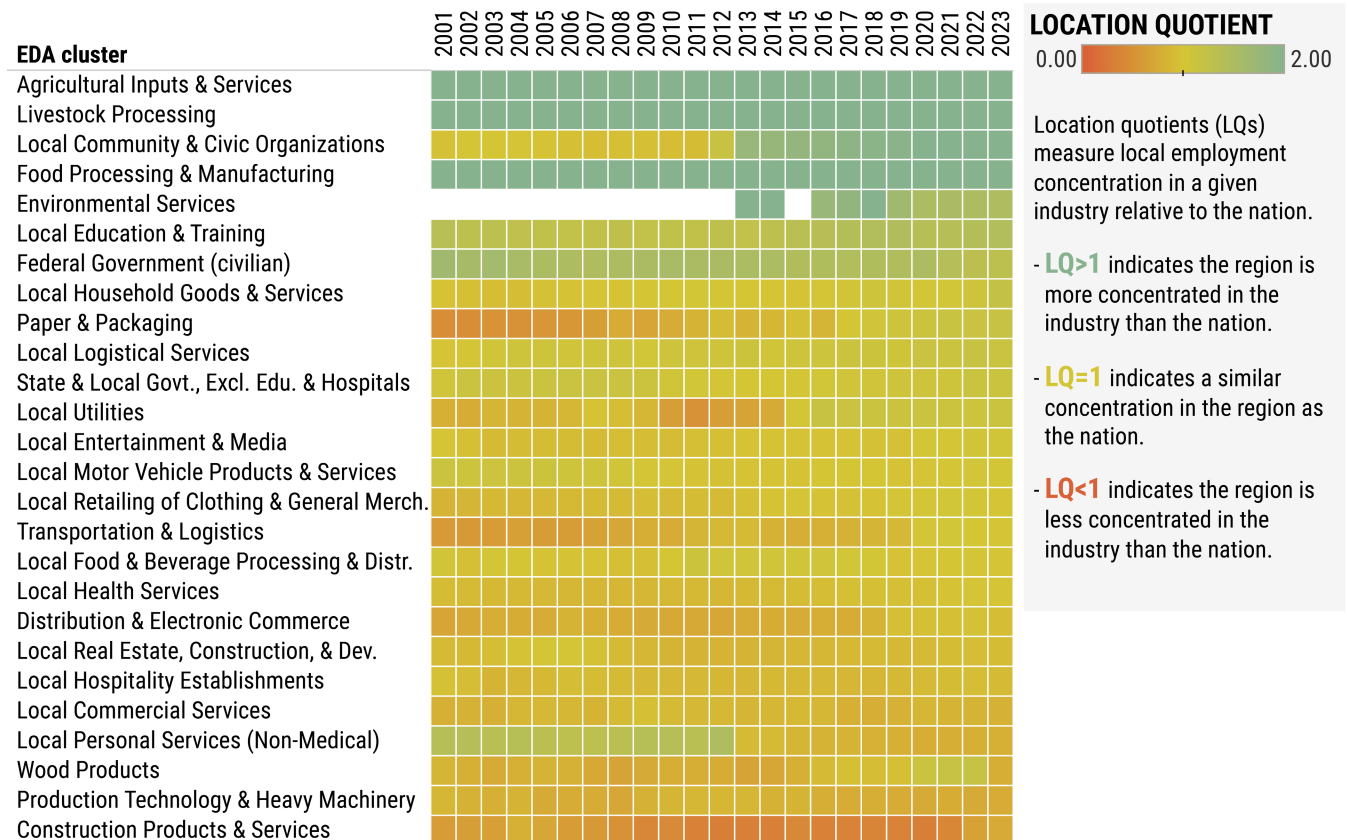
Source(s): US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.

Note(s): Cities are approximated by aggregated ZIP Code-level data. Only includes clusters with at least 500 jobs in Fresno County, California, in 2023.

Serving external rather than local markets, traded sectors represent unique competitive advantages held by the regions in which they are located. Productive farmland, multiple higher learning institutions, and highway and rail infrastructure represent some of the assets that support Fresno County’s traded clusters. The largest traded sector by employment, Agricultural Inputs & Services, represents more than 9 percent of all jobs countywide. The County has a higher concentration in this industry cluster than any other by a wide margin. With a location quotient (LQ) of 8.50, this industry represents a share of the County’s total jobs that is 8.5 times larger than the industry’s share of total jobs nationwide. Agriculture is a crucial component of the regional economy, with Livestock Processing and Food Processing & Manufacturing representing two of the County’s next three highest concentration clusters, with LQs of 4.88 and 2.03, respectively (Figure 12, page 26). Despite this strength, local agricultural employment has decreased in recent years. Among industry clusters with more than 500 jobs in the County, Agricultural Inputs & Services saw the largest negative job change from 2019 to 2023. Pursuit of growth in target sectors like Heavy Manufacturing and Transportation & Logistics, as well as continued innovation in the Agriculture and AgTech sectors, will allow the County to diversify its traded strengths.

Figure 12. EDA Industry Clusters, Concentrations

Location quotients for selected industry clusters in Fresno County, California, 2001–2023



LOCATION QUOTIENT
0.00 2.00

Location quotients (LQs) measure local employment concentration in a given industry relative to the nation.

- **LQ>1** indicates the region is more concentrated in the industry than the nation.
- **LQ=1** indicates a similar concentration in the region as the nation.
- **LQ<1** indicates the region is less concentrated in the industry than the nation.

See Appendix B for full description of Figure 12.

Source(s): US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.

Note(s): Includes industries with at least 500 jobs. Blank squares indicate the total number of jobs in that industry and year fell below the minimum.

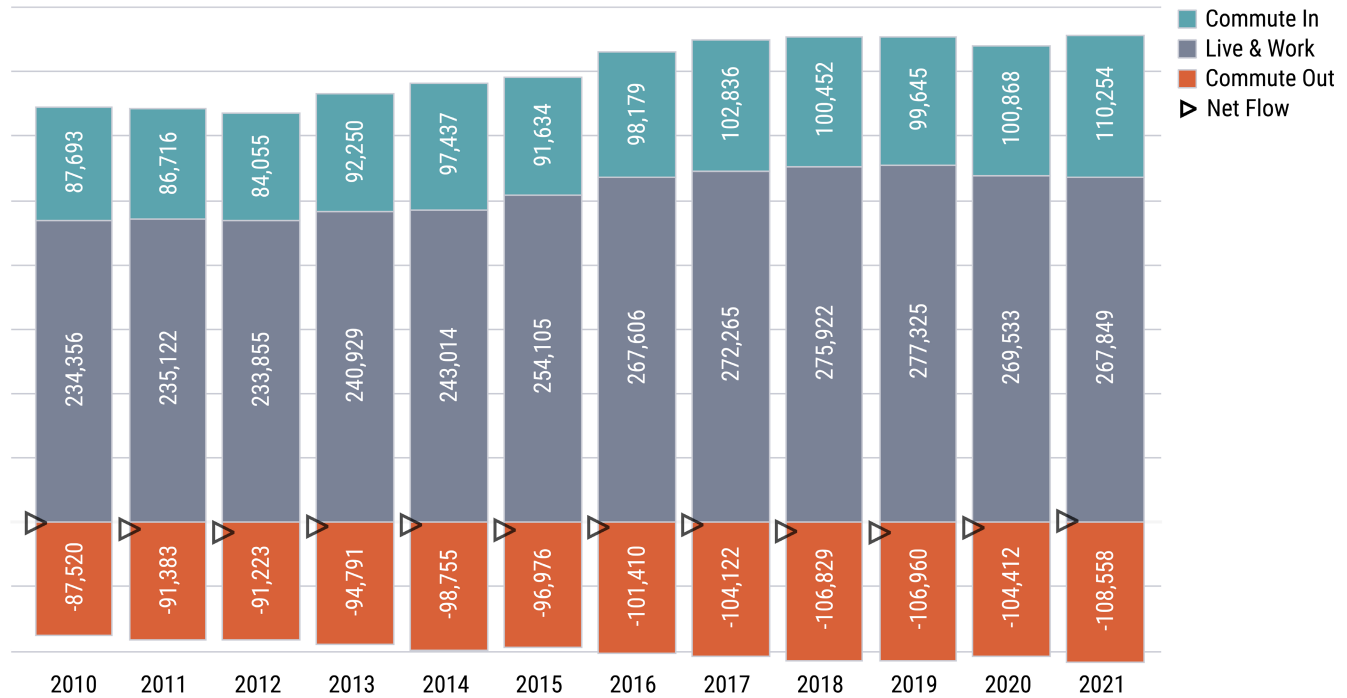
Distribution & Electronic Commerce and Transportation & Logistics both represent growing traded sectors for the County, with both doubling their local employment numbers from 2001 to 2023. The presence of multiple Class I rail lines and an interstate highway have allowed the County to serve as somewhat of a freight leader in commodities like Other Agricultural Products, Printed Products, and Fertilizers. In 2022, 60.24 million tons of freight across all commodities were transported to or from Fresno and Madera Counties.

While Fresno County’s labor force participation rate is comparable to that of California, the County’s unemployment rate (8.6 percent) is higher than that of the state (6.4 percent). This figure is notably higher for some of the County’s lower-income cities, reaching as high as 18.9 percent for San Joaquin.

Most working residents also live within the County (71.2 percent). While there is some fluctuation year-to-year, the County typically has slightly more workers who commute out than commute in, with many of these outward commuters working in the nearby cities of Visalia or Madera (Figure 13, page 27). Likewise, most workers who commute into the County reside in these two cities. Still, the vast majority of those who work in Fresno County reside in the city of Fresno (41.1 percent), Clovis (10.8 percent) or elsewhere within the County. Notably, the Agriculture, Forestry, Fishing & Hunting industry sector represents the largest net inflow of workers for a single industry sector.

Figure 13. Commuting Patterns, Trends

Flow of workers and residents through Fresno County, California, 2001–2021



See Appendix B for full description of Figure 13.

Source(s): US Census Bureau Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc.

Note(s): Goods-producing sectors include agriculture, mining, oil and gas extraction, construction, and manufacturing. Trade, transport, and utilities sector includes retail and wholesale trade, transportation, warehousing, and utilities. All other sectors are aggregated. Only includes residents and workers in California.

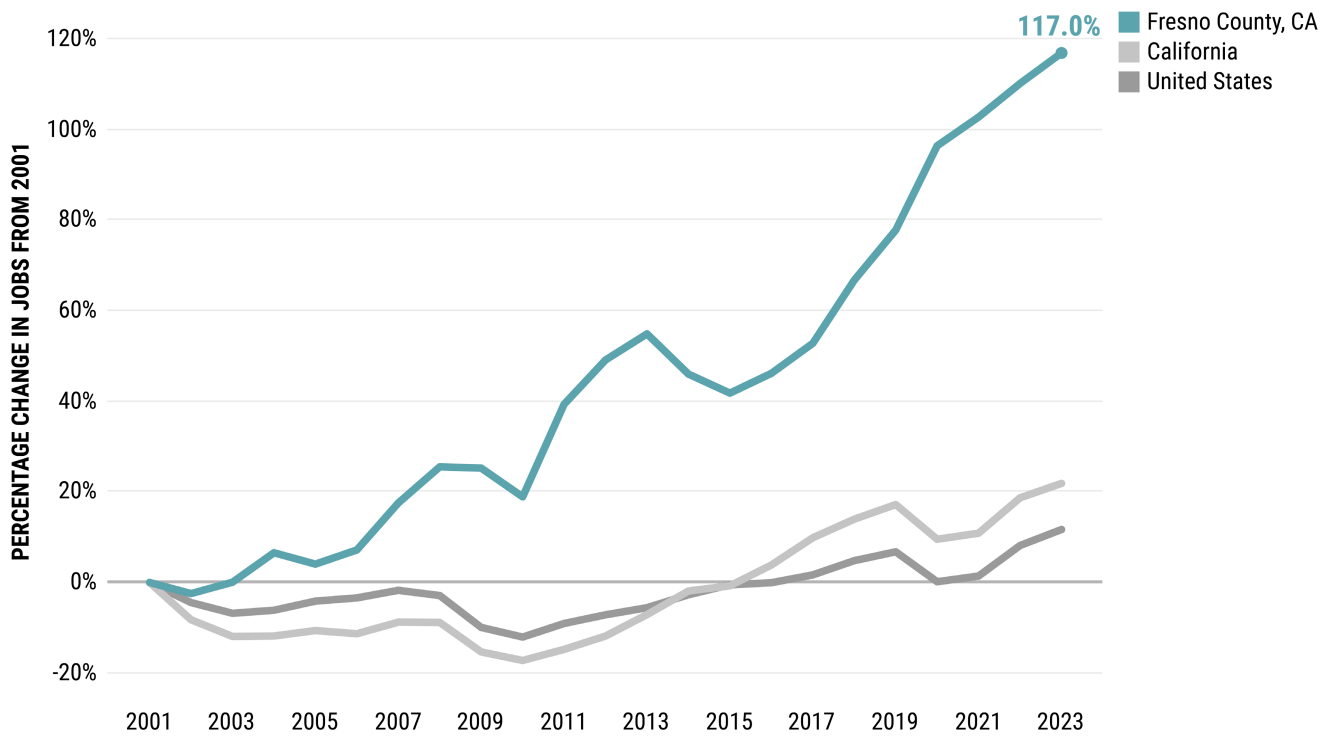
Relationship to State and Regional Economies

Fresno County’s housing market is relatively inexpensive when compared to that of the state, with the median home price for California nearly double that of the County. However, a low median household income and high share of residents living in poverty ensure housing remains unaffordable for many of the County’s residents, an issue that faces much of the state. Fresno County’s status as a lower-income market within California also manifests itself in the high share of residents receiving SNAP benefits (nearly double that of the state), the low share of residents with private insurance, and the relatively high unemployment rates exhibited by the County and many of its municipalities.

As noted previously, Fresno County’s employment in its largest traded sector, Agricultural Inputs & Services, has begun to decline, with a prolonged year-over-year job decrease beginning in the mid-2010s. Over the same period, the statewide industry has continued to grow, with California only seeing significant decline in the first half of the current decade. By contrast, growth in Fresno County’s other traded sector strengths exceeded that of California by wide margins. Distribution & Electronic Commerce grew more than three times as much locally as at the state level since 2001, while Transportation & Logistics grew more than five times as much over the same period (Figure 14, page 28). Other traded sectors in which Fresno County’s growth has eclipsed that of California include Livestock Processing and Paper & Packaging.

Figure 14. EDA Industry Clusters, Long-Term Change

Comparative change for Transportation & Logistics since 2001



[See Appendix B for full description of Figure 14.](#)

Source(s): US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.

Note(s): Cities are approximated by aggregated ZIP Code-level data. Includes industry clusters with at least 500 jobs in Fresno County, California, in 2023.

Fresno County enjoys strong transportation infrastructure, with major roadways connecting the County to California’s large metro areas. Its position along this major goods corridor has bolstered the County’s employment in industry sectors related to transportation and distribution and has made it an important regional freight hub. Of the 29.75 million tons of freight that departed Fresno and Madera Counties in 2022, 62 percent of these goods were destined for elsewhere in California (Figure 15, page 29). The County’s agricultural niche, made evident by its high employment concentration in traded agricultural industry sectors, defines its role in the broader California economy.

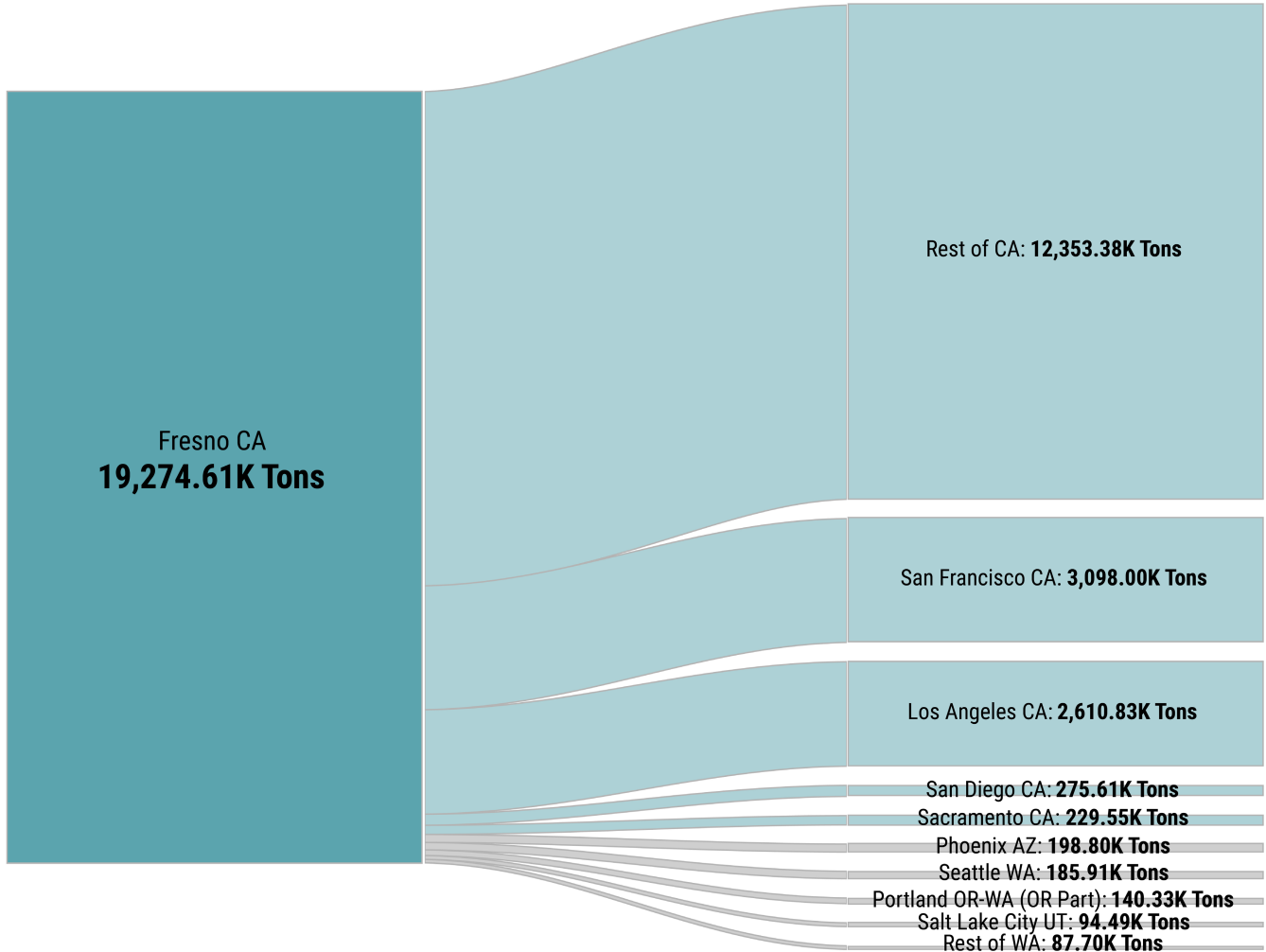
The presence of Yosemite National Park also represents an asset for the County, with Fresno Yosemite International Airport serving as the park’s gateway commercial airport. High-capacity utilization for flights to other California markets, major cities in the western United States, and international flights to central Mexico have allowed airport traffic numbers to continue to climb, with pre-pandemic passenger highs exceeded as early as May 2021.

Figure 15. Freight Flows, Fresno Region, 2022
Commodities transported to or from Fresno

DEPARTING

ARRIVING

Top 10 locations by Tons



[See Appendix B for full description of Figure 15.](#)

Source(s): US Department of Transportation, Bureau of Transportation Statistics (BTS), Federal Highway Administration (FHWA), Freight Analysis Framework (2017-FAF5); The Flerlage Twins, Equal-Width Sankey; TIP Strategies, Inc.

Note(s): The Fresno region includes the following counties in California: Fresno, Madera. Only goods with an origin or destination in the Fresno region are included. Intra-regional freight movements (i.e., goods in transit within the Fresno region) are excluded.

SWOT Analysis

During the discovery phase of the project, the consulting team gathered qualitative input from stakeholders in Fresno County concerning issues affecting local economic development. In addition, TIP conducted quantitative data analyses to understand the County's competitive position in the region. The results of these efforts formed the basis of the strengths, weaknesses, opportunities, and threats (SWOT) analysis.

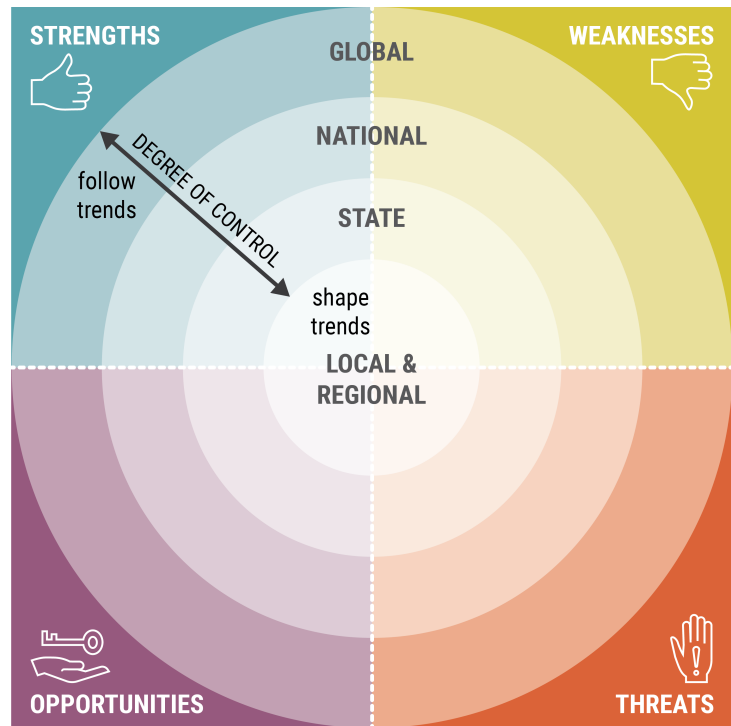
As part of the analysis, the consulting team considered the County's degree of control, an approach that is illustrated in Figure 16. While it is important to be mindful of the impact of external factors and trends and respond where possible, this method ensures that resources are focused on maximizing strengths and opportunities the County and its cities can realistically influence.

Findings from this work directly shaped the CEDS objectives and the associated strategies and action items. Building on the SWOT analysis allows the CEDS to better connect the dots between these essential questions: Where does Fresno County stand now? Where does it want to go? How will it get there? The CEDS strategic framework demonstrates these connections by building on the County's strengths, such as its strong agricultural history, while addressing immediate and long-term challenges, including job losses in the agricultural sector. This approach highlights the need to leverage opportunities, such as investing in innovation, to drive economic diversification.

The four components of a SWOT analysis, which is summarized in Figure 17 (page 31) can be defined as follows.

- **Strengths:** Assets and resources that can be built on to grow, strengthen, and diversify the local/regional economy.
- **Weaknesses:** Liabilities and barriers to economic development that could limit economic growth potential.
- **Opportunities:** Competitive advantages and positive trends that hold significant potential for the attraction of new businesses, investments, and skilled workers.
- **Threats:** Unfavorable factors and trends (often external) that could negatively affect the local/regional economy.

Figure 16. SWOT Approach Diagram



[See Appendix B for full description of Figure 16.](#)

Source(s): TIP Strategies, Inc.

Figure 17. Summary of SWOT Analysis for Fresno County, California

	Internal High Degree of Control (Local, Regional, State)	External Low Degree of Control (National, Global)
Strengths	<ul style="list-style-type: none"> • High-quality K–12 education systems • Robust agriculture cluster • Strong distribution & logistics (D&L) sector • Urban and rural lifestyles • Success in securing major grants (demonstrated partnerships) • Renewable energy developments • Diverse population • Network of higher education assets (serves local population) • Collaborative cross-sector initiatives (Fresno State’s ABE, F3, Good Jobs Challenge, etc.) • High-quality healthcare providers 	<ul style="list-style-type: none"> • National parks and forests • Geographic location • Visibility/profile of California
Weaknesses	<ul style="list-style-type: none"> • High percentage of low-wage jobs • Lack of access to high-quality and affordable childcare • Infrastructure lags site development (especially electricity & utilities) • Lack of resilient infrastructure (i.e., lack of groundwater recharge, water quality systems) • Low supply of housing • Educational attainment varies across the County (skills gap) • Lack of intermodal facility for ag D&L 	<ul style="list-style-type: none"> • Long permitting processes • Water scarcity • Escalating utility costs • Rising insurance costs
Opportunities	<ul style="list-style-type: none"> • Innovation assets (agtech, healthcare, Fresno State/WET Center) • Economic diversification, foreign direct investment • Fresno Yosemite International Airport growth • Inland port • Career exposure • D&L industry expansion (hub) • Outdoor recreation (assets and innovation) • Quality of place initiatives (downtown/main streets revitalization, parks, etc.) • Workforce development (upskilling) • Enhanced countywide coordination and collaboration • Intra-county transportation improvements • Talent attraction and retention • Agri-tourism (Food Trail, Blossom Trail, wine industry, etc.) • Broadband infrastructure 	<ul style="list-style-type: none"> • National investments/policies toward reshoring • Manufacturing investments • Infrastructure funding (including high speed rail) • California statewide energy plan
Threats	<ul style="list-style-type: none"> • Water quality • Loss of agriculture jobs • Aging infrastructure, investments not keeping pace with growth • Fallow land • Shortage of training staff (e.g., nurses can make more in a clinical setting than teaching) • Talent out migration 	<ul style="list-style-type: none"> • Extreme or unprecedented weather patterns • Trade policy • Regulations and policies • Water availability • Automation impacts on labor (especially in ag and D&L) • Consolidation of family farms into global conglomerates • Federal funding programs and opportunities

See [Appendix B](#) for full description of Figure 17.

Source(s): TIP Strategies, Inc.

2025 Community Vision Survey

As part of the CEDS planning process, TIP Strategies conducted an online survey of residents' vision for Fresno County, California. The 2025 Community Vision Survey was open for a two-week period between January 13, 2025, and January 24, 2025, and drew 628 respondents. The survey instrument opened with basic questions about respondent location and demographics. The remainder of the survey included seven questions directed at respondent perceptions of and vision for the County. All responses were confidential. Question-by-question results were provided as an interactive data visualization, and survey findings were used to guide the direction of the strategic plan.

Nearly all respondents (95.9 percent) were located in a Fresno County ZIP Code. Generation X (258 of 628 respondents) were the dominant age group in the survey, followed by Millennials (250), Baby Boomers (68), Gen Z (46), and 6 pre-Boomers. More than two-thirds of all respondents were women. The survey was not designed to be a scientific sample, though the pool of respondents was large enough and stratified enough to provide convincing strategic feedback. As a result, the survey yielded valuable and relevant input from residents in the County.

Affordability and quality of life are primary concerns.

Throughout the survey, respondents noted the unaffordability of living in Fresno County. Cost of living was rated as the County's greatest relative weakness, with a score of 2.3 out of 5.0. When asked about their vision for the County's next 10 years, respondents selected "affordable" more than any other answer by a wide margin, representing 9.5 percent of all responses. This need for affordability manifests itself in the importance placed on the development of affordable housing options. As a CEDS focus area, residential development scored an above-average 3.4 out of 5.0. Likewise, the option "increases housing" represented 6.7 percent of responses regarding ways in which the County can better support its residents. Beyond reducing the cost of living, respondents placed high importance on broader quality of life concerns, with "community development" (4.0) and "outdoor recreation" (3.8) representing high economic development priorities. Visions of a "growing," "community-centric," "safe," and "healthy" County characterize how respondents imagine the County's future. While "quality of place" ranked as a relative weakness for the community (2.7), placemaking investments scored as the second-lowest economic development priority (3.0).

Industrial and community diversity are viewed as assets.

Diversity is seen as a clear community asset, representing both the most commonly selected word associated with the County (16.8 percent of all responses) and its greatest strength (3.8 out of 5.0). While respondents celebrate the County's demographic diversity, they also indicated a need to pursue economic diversity by attracting target industry employers to the region. "Diversified" garnered 5.2 percent of responses for respondents' vision for the County's future, while "industry specialties" was selected as one of the County's lowest regional strengths (2.7). Respondents point to California's largest markets with diverse economies—Sacramento, San Diego, Los Angeles, and San Francisco—as examples of aspirational communities. To better support existing residents, respondents indicated a need for the County to attract businesses (7.4 percent) and create jobs (10.7 percent), setting business recruitment as a moderately high priority (3.7 out of 5.0).

Workforce development is perceived as having the highest potential impact.

In addition to attracting target industry businesses to diversify the local economy, respondents also noted the importance of retaining existing businesses and providing opportunities to connect residents with higher-wage jobs. Workforce development scored as having the highest potential impact of all focus areas in the County's

CEDS process (3.5 out of 5.0). It also ranked as the third-highest priority economic development planning effort (4.0). Respondents indicated a need to develop a local workforce and small businesses while retaining existing talent. As the County's educational opportunities (3.2) and talent (2.9) are seen as average strengths, responses like "develops local workforce," "invests in public education," and "provides skills-training" represent ways in which the County can better support its residents. Removing barriers to work like limited childcare (3.8) and transit (3.9) were also given high priority. Additionally, business retention, the fourth-highest economic development priority (4.0), can be supported by upskilling the local workforce.

Infrastructure and natural resources should be among the highest priorities.

Among several high-scoring economic development planning efforts, "water systems" was selected as the County's highest priority with a score of 4.1 out of 5.0. Open-ended comments indicated a high emphasis on stewarding the County's natural resources, while future vision words like "sustainable," "stable," and "thriving" suggest a community with reliable access to clean air and water. More broadly, "infrastructure systems" scored as another high priority (3.9), with respondents citing a need for the County to better support its residents by strengthening its infrastructure (6.2 percent of responses), providing critical aid for public health and resilience. The CEDS process was perceived as relatively impactful as far as infrastructure development (3.4). Respondents expressed that the County must be prudent in how it balances a largely agriculture-oriented economy with the threats of climate uncertainty and water scarcity.

Appendix A. Case Studies

The following best practices and use cases illustrate how other regions have addressed complex economic development challenges. While not intended as direct recommendations for Fresno County, they offer insights that can help inform the implementation of the CEDS.

Banfield Pet Hospital Corporate Headquarters

In 2014, Mars, Incorporated announced it would be relocating the corporate headquarters of Banfield Pet Hospital from Portland, Oregon, to Vancouver, Washington, despite the Evergreen State's lack of competitive state-level incentives. Although the state was only able to offer \$200,000 in incentives for the [\\$75 million project](#), which was projected to employ over 600 high-wage workers, the city of Vancouver was able to waive a portion of the local impact and development fees. However, the two [incentives](#) with the most impact were the city's willingness to turn one-half acre of land adjacent to the campus into a public dog park that could be utilized by Banfield's employees, as employees regularly bring their dogs to work. Banfield worked with the city's Parks, Recreation & Cultural Services to ensure the design would be beneficial for the community as well. Banfield's senior manager for the development was quoted as seeing the dog park as the "[jewel](#) of the campus." The second was the city's offer to rename a non-arterial street adjacent to their new campus.

Excelsior Jobs Program

Launched in July 2010 as a successor to the Empire Zones initiative, the [Excelsior Jobs Program](#) offers targeted, performance-based tax credits across strategic industries—such as high-tech, life sciences, manufacturing, and agriculture—to encourage business expansion and relocation in New York. Participants earn refundable credits for new job creation (up to 6.85 percent of wages) and qualified investments, with enhanced benefits for green and CHIPS projects. Central to its mission is a stringent accountability framework that ensures participating companies follow through on their commitments, including maintaining clear benchmarks for employment and investment, before they can claim benefits.

Best Practices Visits

A best practices trip allows leaders from the public, business, and education sectors to explore how other communities address economic and policy challenges. By visiting cities that have successfully implemented strategies in areas such as business retention, land use, and transportation, participants gain firsthand insights into effective regional planning and economic development. These trips also serve as a platform for collaboration, enabling leaders to exchange ideas, build networks, and apply lessons learned to their own communities.

Examples

[Denver leaders visit Vancouver, British Columbia](#)

[Greater Portland, Inc. Annual Best Practices Trip](#)

[Atlanta leaders visit Montreal, Quebec](#)

Futures Committee (Fort Collins, Colorado)

The Fort Collins, Colorado, Futures Committee is a city-staffed committee comprised of city councilmembers. The committee was formed in 2011 for the purpose of developing a long-term vision for the future of Fort Collins. The Futures Committee meets monthly, and meetings are open to the public. Background information, including organizational documents and meeting agendas (past and future), can be found on the city's [website](#).

JAXUSA Earn Up

[Earn Up](#) is a multi-faceted workforce development initiative serving the seven-county region of Northeast Florida. Funded by JAXUSA Partnership, the region's economic development organization, Earn Up is a collaborative of partners focused on moving residents "from classroom to career." One of the initiative's core components is the use of career pathways that allow Northeast Florida residents to build careers in the region's target sectors and supporting industries. Through the program, Earn Up looks at occupations, annual demand, and wages. It then maps out career paths based on education and training requirements, with options ranging from high school completion through advanced degrees, all of which are available from career and technical education programs, community colleges, and universities in Northeast Florida. Earn Up's Career Pathways Campaign was named a Gold Winner in Talent Development Programs by the International Economic Development Council as part of its 2022 Excellence in Economic Development Awards. In addition to career pathways tools, Earn Up has resources for connecting students, adult learners, and veterans to internship and apprenticeship opportunities.

Manufacturers Alliance Study

In 2023, the national Manufacturers Alliance conducted a member survey to explore the impact of workplace flexibility on employee satisfaction and operational efficiency in the manufacturing sector. The [study](#) found that companies adopting creative scheduling solutions, such as alternative shift structures and remote work options, experienced improved employee morale, higher retention rates, and sustained productivity. As manufacturers face ongoing labor shortages and increasing demands for efficiency, flexibility has emerged as a leading strategy for maintaining a stable and engaged workforce. One US-based manufacturing company applied this principle by implementing a four-day workweek, allowing employees to enjoy extended weekends while ensuring operational efficiency. This adjustment required strategic changes, including optimizing production schedules and cross-training employees. Despite initial concerns, the results were overwhelmingly positive: overtime costs decreased, retention improved, and new talent was attracted by the flexible work arrangement. Employees reported feeling more engaged and energized, demonstrating that innovative scheduling can lead to a happier, more productive workforce.

Colorado Center of Excellence for Advanced Technology Aerial Firefighting

Established by the Colorado Legislature in 2014, the Colorado [Center of Excellence for Advanced Technology Aerial Firefighting](#) (CoE) was created to research and enhance technologies supporting wildland fire operations. While its name highlights aerial firefighting, the CoE's work extends beyond aviation to encompass a broad range of wildfire response strategies. Recognizing that effective wildland firefighting requires a coordinated effort involving multiple resources, the CoE's research and initiatives reflect this integrated approach. In addition to its focus on wildland fire, many of the CoE's projects have applications beyond firefighting. Its work supports response efforts for structural fires, hazardous materials incidents, and vehicle fires, as well as broader emergency operations such as law enforcement and disaster response. Through its research and technology development, the CoE plays a key role in improving emergency management and public safety across multiple disciplines.

Appendix B. Long Descriptions

This section provides more detailed descriptions of complex graphics and figures presented in this document. It is intended to supplement alternative text as part of an effort to make the content more accessible for individuals using assistive technology.

Figure 1. Stakeholder Engagement Overview

This graphic illustrates outreach activities that engaged more than 200 stakeholders via community meetings, roundtables & interviews, and CEDS strategy committee participation, as well as more than 600 individuals via an online survey.

CATEGORY OF ENGAGEMENT	DESCRIPTION
Community Meetings	16 meetings conducted in the following locations: Caruthers area, Clovis, Coalinga, Firebaugh, Fowler, Huron, Kerman, Kingsburg, Mendota, Orange Cove, Parlier, Reedley, San Joaquin, Sanger, Selma, and Shaver Lake area.
Roundtables & Interviews	24 sessions held with representatives from higher education, workforce, industry & large employers, entrepreneurs & startups, real estate & development, economic development partners, agriculture industry, and broadband
CEDS Strategy Committee	40 members engaged in 8 separate committee meetings, along with an opportunity workshop, project rollout, and implementation workshop.
Online Survey	More than 600 community members participated in an online survey to solicit their perceptions of and vision for Fresno County.

Return to Figure 1, page 2.

Figure 5. Menu of the Interactive Deliverable

This image shows the menu structure of the interactive Tableau visualization, which was delivered separately. The menu lists several data elements that were analyzed as part of the CEDS planning process organized under three broad sections. The baseline analysis looked at population, socioeconomic, and employment and industry data. The second section considered occupational structure, worker dynamics, and target sectors. The third and final aspect of the analysis provided an overview of developing land and existing infrastructure, along with relevant factors such as electricity, broadband access, air passenger traffic, and freight flows.

Return to Figure 5, page 15.

Figure 6. Race & Ethnicity Comparisons, 2022

This stacked bar chart shows race and ethnicity by percentage of population. It has two sections. The first compares Fresno County, California, to 14 of its cities, the entire state of California, and the United States. Fresno County is near the top of the chart when sorted for residents who are non-Hispanic White, falling below the state and nation. Many of the County's cities demonstrate a large majority Hispanic or Latino population. The second part of the chart shows the same information in peer communities with similarities to Fresno County, illustrating comparable demographics to Fresno County.

Fresno County cities in this chart are Clovis, Fowler, Kingsburg, Reedley, Kerman, Sanger, Coalinga, Selma, Orange Cove, Parlier, Firebaugh, Mendota, Huron, and San Joaquin in California. Peer communities listed are Kern County, California; Madera County, California; Tulare County, California; the Inland Empire (the Riverside–San Bernadino California metro area); and the Reno, Nevada, metro area.

Return to Figure 6, page 17.

Figure 7. Educational Attainment, 2022

This stacked bar chart shows educational attainment by percentage of population. It has two sections. The first compares Fresno County, California, to 14 of its cities, the entire state of California, and the United States. Fresno County is near the top of the chart when sorted for residents with a bachelor’s degree or higher. However, the County falls below the rate of bachelor’s and advanced degrees shown for both California and the nation. The second part of the chart shows the same information in peer communities with similarities to Fresno County.

Fresno County cities in this chart are Clovis, Fowler, Kingsburg, Reedley, Kerman, Sanger, Coalinga, Selma, Orange Cove, Parlier, Firebaugh, Mendota, Huron, and San Joaquin in California. Peer communities listed are Kern County, California; Madera County, California; Tulare County, California; the Inland Empire (the Riverside–San Bernadino California metro area); and the Reno, Nevada, metro area.

Return to Figure 7, page 18.

Figure 8. Target Industry Qualifications, Minimum Education Requested

This stacked bar chart shows the typical minimum education level requested across six target industries by share of job postings. Target industries classified as “Established & Growing” include Agriculture & Food Processing; Renewable Energy; Healthcare; Heavy Manufacturing; and Transportation & Logistics, with jobs in each of these industries most commonly requiring a high school-level education at minimum. The remaining target industry, AgTech, is classified under “Emerging Opportunities,” and jobs in this industry most commonly require a bachelor’s-level education at minimum.

Return to Figure 8, page 19.

Figure 9. Median Household Income, 2022

This bar chart shows median household income. It has two sections. The first compares Fresno County, California, to 14 of its cities, the entire state of California, and the United States. Fresno County is in the upper half of this section, falling above many of its cities but notably below the nation, state, and city of Clovis. The second part of the chart shows the same information in peer communities with similarities to Fresno County, illustrating a median income comparable to Fresno County and its higher-income cities.

Fresno County cities in this chart are Clovis, Fowler, Kingsburg, Reedley, Kerman, Sanger, Coalinga, Selma, Orange Cove, Parlier, Firebaugh, Mendota, Huron, and San Joaquin in California. Peer communities listed are Kern County, California; Madera County, California; Tulare County, California; the Inland Empire (the Riverside–San Bernadino California metro area); and the Reno, Nevada, metro area.

Return to Figure 9, page 20.

Figure 10. Housing-Cost Burdened Owners, 2022

This bar chart shows the share of housing-cost burdened homeowners defined here as the share of households spending 30 percent or more of income on housing costs. It has two sections. The first compares Fresno County, California, to 14 of its cities, the entire state of California, and the United States. With just over one quarter of all owners cost-burdened, Fresno County falls directly in the middle of this section, above the national figure, but below the state figure. The second part of the chart shows the same information in peer communities with similarities to Fresno County, with the rate of cost-burdened owners exceeding that of Fresno County in all peers but the Reno, Nevada, metro area.

Fresno County cities in this chart are Clovis, Fowler, Kingsburg, Reedley, Kerman, Sanger, Coalinga, Selma, Orange Cove, Parlier, Firebaugh, Mendota, Huron, and San Joaquin in California. Peer communities listed are Kern County,

California; Madera County, California; Tulare County, California; the Inland Empire (the Riverside–San Bernadino California metro area); and the Reno, Nevada, metro area.

Return to Figure 10, page 21.

Figure 11. EDA Industry Clusters, Job Count

This bar chart shows Fresno County’s employment by industry cluster, with 31 different clusters identified as either local or traded by their color. Local Health Services sits atop the chart as the largest industry cluster with over 45,000 jobs, followed closely by the traded Agricultural Inputs & Services cluster. Large, local industry clusters represent most of the chart’s upper half. Of the chart’s 15 largest clusters, 12 are local. Traded clusters characterize the lower half of the chart, with the more specialized traded clusters representing smaller employment numbers within the County.

Local and traded clusters are defined as part of the figure. Local clusters are characterized as those that primarily serve local markets, are present in most communities, and do not rely on competitive advantages to locate to a community. By contrast, traded clusters serve external markets and are highly concentrated in regions offering specific advantages.

Return to Figure 11, page 25.

Figure 12. EDA Industry Clusters, Concentrations

This figure shows an array of grid cells where each row represents an industry cluster, and each column represents a single year from 2001 through 2023. Each cell is shaded on a red-yellow-green color gradient, with red representing a location quotient value of 0, yellow representing a value of 1, and green representing a value of 2. Industries are sorted by their location quotient value in 2023, so that high concentration industries like Agricultural Inputs & Services and Livestock Processing sit atop the chart. Changes in concentration over time can be observed by following the color gradient of each row from 2001 through 2023, with some industries remaining relatively stable over time and others experiencing major changes in location quotient.

Return to Figure 12, page 26.

Figure 13. Commuting Patterns, Trends

This stacked bar chart shows commuting patterns in Fresno County for the period of 2010 through 2021. A segment of each bar chart illustrates each of the three types of commuters: inward commuting workers, residents who work within the County, and outward commuting residents. All three commuter types can be observed to have grown relatively evenly over time, with the number of residents who live and work in Fresno County peaking in 2019. An arrow representing the number of inward commuters minus the number of outward commuters for each year consistently indicates a net flow of close to zero workers.

Return to Figure 13, page 27.

Figure 14. EDA Industry Clusters, Long-Term Change

This line chart shows the percent change in jobs for the Transportation & Logistics industry since 2001 for Fresno County, the state of California, and the United States. Neither California nor the United States demonstrate industry employment greater than their 2001 figure until 2016, and both suffer a prolonged slowdown beginning in 2007. Fresno County demonstrates growth as early as 2003, and despite multiple periods of decreasing industry jobs, the County demonstrates significantly higher comparative growth than the state and nation. By 2023, Fresno County’s comparative industry growth has reached nearly 120 percent, while California’s has just eclipsed 20 percent, and the nation’s just 10 percent.

Return to Figure 14, page 28.

Figure 15. Freight Flows, Fresno Region, 2022

This Sankey diagram illustrates the distribution of commodities to each of the top 10 destinations by weight for freight departing the Fresno metropolitan statistical area. On the left, a block is labeled “Fresno CA” with a value of over 19,000 tons. This represents the portion of all freight departing Fresno and Madera Counties in 2022 destined for a top 10 location. Proportionally thick lines are drawn to 10 proportionally sized boxes on the right, each with a place and value label. The largest is labeled “Rest of CA,” followed by two smaller boxes labeled “San Francisco CA” and “Los Angeles CA,” and two yet smaller boxes labeled “San Diego CA” and “Sacramento CA.” Five other, smaller boxes represent Fresno’s remaining top 10 freight destinations, which are out of state.

Return to Figure 15, page 29.

Figure 16. SWOT Approach Diagram

The graphic shows four concentric circles overlaying one another and divided into four quadrants. The largest circle is labeled “Global.” Situated within this circle and growing increasingly smaller are three circles labeled “National,” “State,” and “Local and Regional.” The quadrants reflect the components of the SWOT described in the narrative: strengths (upper left), weaknesses (upper right), opportunities (lower left), and threats (lower right). An arrow cuts across the circles to illustrate the degree of control Fresno County has over these factors moving from “follow trends” at the global level to “shape trends” at the local and regional level.

Return to Figure 16, page 30.

Figure 17. Summary of SWOT Analysis for Fresno County, California

The table summarizes the strengths, weakness, opportunities, and threats, prepared as part of the CEDS planning process. Each element has been broken out into four separate tables—Figure 17A through Figure 17D—each with two columns. The first column of each table lists local, regional, and state factors over which Fresno County has a relatively high degree of control. The second column lists national and global factors over which Fresno County has little or no control.

Figure 17A. Summary of Strengths

High Degree of Control (Local, Regional, State)	Low Degree of Control (National, Global)
<ul style="list-style-type: none"> • High-quality K–12 education systems • Robust agriculture cluster • Strong distribution & logistics (D&L) sector • Urban and rural lifestyles • Success in securing major grants (demonstrated partnerships) • Renewable energy developments • Diverse population • Network of higher education assets (serves local population) • Collaborative cross-sector initiatives (Fresno State’s ABE, F3, Good Jobs Challenge, etc.) • High-quality healthcare providers 	<ul style="list-style-type: none"> • National parks and forests • Geographic location • Visibility/profile of California

Figure 17B. Summary of Weaknesses

High Degree of Control (Local, Regional, State)	Low Degree of Control (National, Global)
<ul style="list-style-type: none"> • High percentage of low-wage jobs • Lack of access to high-quality and affordable childcare • Infrastructure lags site development (especially electricity & utilities) • Lack of resilient infrastructure (i.e., lack of groundwater recharge, water quality systems) • Low supply of housing • Educational attainment varies across the County (skills gap) • Lack of intermodal facility for ag D&L 	<ul style="list-style-type: none"> • Long permitting processes • Water scarcity • Escalating utility costs • Rising insurance costs

Figure 17C. Summary of Opportunities

High Degree of Control (Local, Regional, State)	Low Degree of Control (National, Global)
<ul style="list-style-type: none"> • Innovation assets (agtech, healthcare, Fresno State/WET center) • Economic diversification, foreign direct investment • Fresno Yosemite International Airport growth • Inland port • Career exposure • D&L industry expansion (hub) • Outdoor recreation (assets and innovation) • Quality of place initiatives (downtown/main streets revitalization, parks, etc.) • Workforce development (upskilling) • Enhanced countywide coordination and collaboration • Intra-county transportation improvements • Talent attraction and retention • Agri-tourism (Food Trail, Blossom Trail, wine industry, etc.) • Broadband infrastructure 	<ul style="list-style-type: none"> • National investments/policies toward reshoring • Manufacturing investments • Infrastructure funding (including high speed rail) • California statewide energy plan

Figure 17D. Summary of Threats

High Degree of Control (Local, Regional, State)	Low Degree of Control (National, Global)
<ul style="list-style-type: none"> • Water quality • Loss of agriculture jobs • Aging infrastructure, investments not keeping pace with growth • Fallow land • Shortage of training staff (e.g., nurses can make more in a clinical setting than teaching) • Talent out migration 	<ul style="list-style-type: none"> • Extreme or unprecedented weather patterns • Trade policy • Regulations and policies • Water availability • Automation impacts on labor (especially in ag and D&L) • Consolidation of family farms into global conglomerates • Federal funding programs and opportunities

Return to Figure 17, page 31.



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