

Regional Economic Analysis Profile

San Joaquin Valley Economic Sub-Market
Fresno, Kern, Kings, Madera, and Tulare Counties

April 2015



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SUMMARY OF THE SAN JOAQUIN VALLEY ECONOMIC SUB-MARKET INDUSTRY CLUSTERS

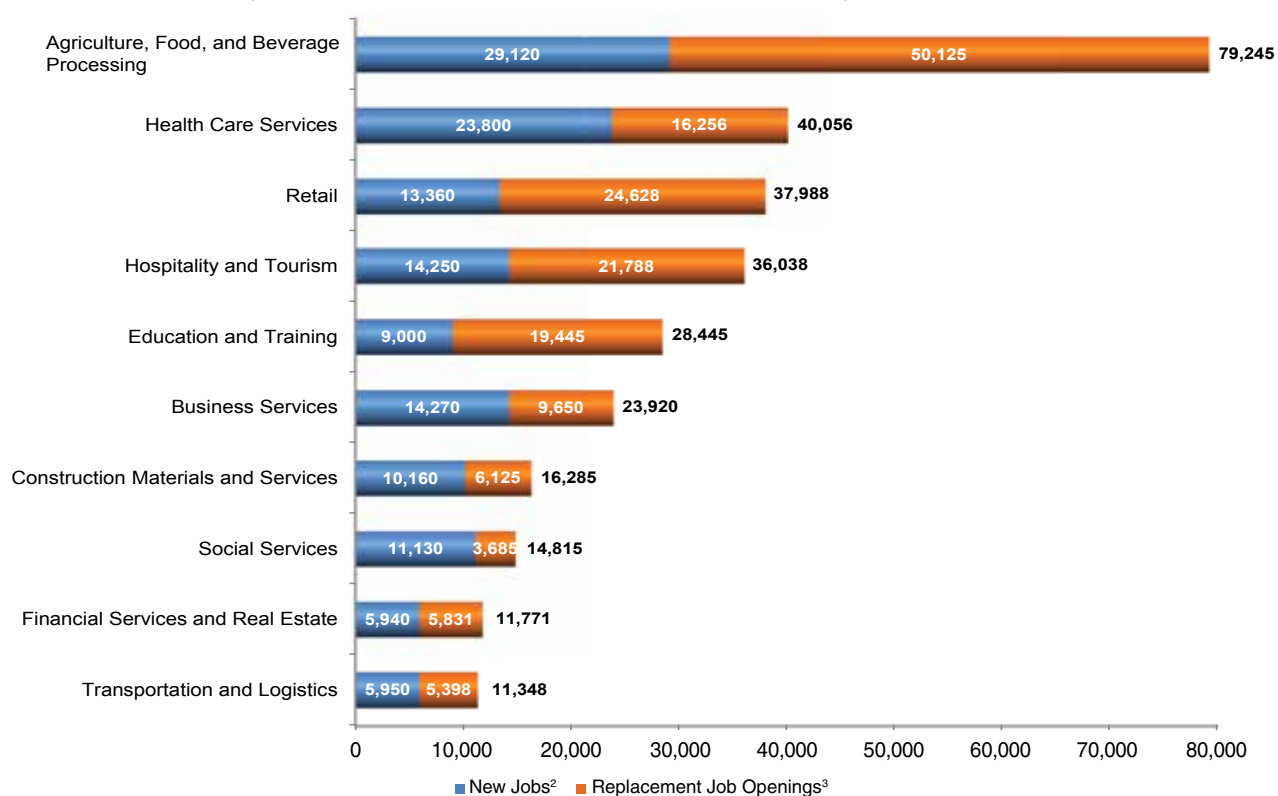
What is an Industry Cluster?

Industry clusters are groups of associated industries in an economic market that stimulate the creation of new businesses and job opportunities in a particular field. The application of workforce and economic development resources toward the continual development of industry clusters will help stimulate economic growth and boost the number of employment opportunities for the labor force.

Purpose of this Report

The purpose of this report is to help align the state's workforce institutions and programs around the needs of economic sub-market industry clusters. This report focuses on the future employment demand of economic sub-market industry clusters and features them as primary investment opportunities for the California workforce development system. The goal of this report is to account for industry clusters with the largest number of projected total job openings¹ and help the California workforce development system prepare the state's workforce to compete for these future job opportunities.

Top 10 Industry Clusters in the San Joaquin Valley Economic Sub-Market**



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

¹ Total job openings are the sum of new jobs and replacement job openings.

² New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

³ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

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INDUSTRY CLUSTER DESCRIPTIONS

The following are descriptions of the San Joaquin Valley Economic Sub-Market's** top 10 industry clusters followed by a list of the top industries with the highest total projected job openings in the cluster.

The **Agriculture, Food, and Beverage Processing** industry cluster includes establishments primarily engaged in growing crops, raising animals, and manufacturing food and beverages, as well as support activities for crop and animal production. During 2013-2014,* this cluster employed nearly 196,000 people in the economic sub-market, accounting for 24.2 percent of the workforce. Top industries in this cluster include:

- Support Activities for Crop Production
- Fruit and Tree Nut Farming
- Cattle Ranching and Farming
- Other Food Manufacturing
- Fruit and Vegetable Preserving and Specialty Food Manufacturing

The **Health Care Services** industry cluster includes acute care and outpatient hospitals, nursing homes and rehabilitation centers, adult day care centers, and community service agencies for the elderly. It employed nearly 86,000 people in the economic sub-market during 2013-2014,* accounting for 10.6 percent of the workforce. Industries in this cluster may include both public and private employment. Top industries within this cluster include:

- General Medical and Surgical Hospitals
- Offices of Physicians
- Nursing Care Facilities (Skilled Nursing Facilities)
- Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
- Outpatient Care Centers

The **Retail** industry cluster includes grocery and department stores, dollar stores, retail pharmacies, and clothing specialty stores. During 2013-2014,* this cluster employed almost 83,000 workers, or about 10.2 percent of the economic sub-market's total employment. Industries projected to have the largest number of jobs (new and replacement) include:

- Grocery Stores
- Other General Merchandise Stores
- Department Stores
- Building Material and Supplies Dealers
- Gasoline Stations

The **Hospitality and Tourism** industry cluster includes interrelated industries such as eating establishments, hotels and motels, casinos, museums, and sightseeing transportation. During 2013-2014,* this cluster was comprised of more than 67,000 workers, or 8.3 percent of the economic sub-market's employment. Industries within this cluster with the most projected job openings include:

- Restaurants and Other Eating Places
- Traveler Accommodation
- Other Amusement and Recreation Industries
- Special Food Services
- Drinking Places (Alcoholic Beverages)

The **Education and Training** industry cluster is comprised of public and private elementary and high schools, community colleges, universities, and professional schools with programs such as dental, law, and medical. Other establishments include English as a Second Language (ESL) programs, test preparation and tutoring, or driving instruction. During 2013-2014,* this cluster employed nearly 84,000 people in the economic sub-market, accounting for 10.3 percent of the workforce. Top industries within this cluster include:

- Elementary and Secondary Schools
- Colleges, Universities, and Professional Schools
- Junior Colleges
- Other Schools and Instruction
- Technical and Trade Schools

The **Business Services** industry cluster is comprised of industries that include temporary help agencies, employer organizations, janitorial services, security systems services, and carpet cleaning establishments. This cluster employed more than 47,000 people during 2013-2014,* or 5.8 percent of the economic sub-market's workforce. Top industries in this cluster include:

- Employment Services
- Services to Buildings and Dwellings
- Management of Companies and Enterprises
- Investigation and Security Services
- Other Support Services

* Quarterly Census of Employment and Wages (QCEW), a federal-state cooperative program, for the period April 2013 through March 2014.

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INDUSTRY CLUSTER DESCRIPTIONS

The **Construction Materials and Services** industry cluster is comprised of builders of mechanical systems such as electrical, heating, and water; specialty trades outfits such as drywall, flooring, and painting contractors; residential and commercial builders; and contractors who complete foundation and framing work. During 2013-2014,* nearly 35,000 workers made up the cluster's employment, representing 4.3 percent of the economic sub-market's total workforce. Industries showing the highest projected job openings include:

- Building Equipment Contractors
- Building Finishing Contractors
- Foundation, Structure, and Building Exterior Contractors
- Residential Building Construction
- Nonresidential Building Construction

The **Social Services** industry cluster is comprised of establishments and agencies (public and private) that provide non-residential services for the welfare of children, adults, the elderly, and disabled. Examples include nonmedical in-home care programs, day care centers, and community food banks. In total, the cluster employed nearly 31,000 people and accounted for 3.8 percent of the economic sub-market's workforce in 2013-2014.* Industries include:

- Individual and Family Services
- Vocational Rehabilitation Services
- Child Day Care Services
- Community Food and Housing, and Emergency and Other Relief Services

The **Financial Services and Real Estate** industry cluster includes commercial banks, savings institutions, credit unions, credit card companies, insurance firms, and real estate appraisers or property management companies. During 2013-2014,* nearly 24,000 workers made up the cluster's employment, representing 2.9 percent of the economic sub-market's total workforce. Industries showing the highest projected job openings include:

- Depository Credit Intermediation
- Insurance Carriers
- Agencies, Brokerages, and Other Insurance Related Activities
- Lessors of Real Estate
- Activities Related to Real Estate

The **Transportation and Logistics** cluster is made up of interrelated industries such as refrigerated warehousing, self-storage facilities, freight transporting companies, and overnight delivery businesses. In 2013-2014,* almost 27,000 workers were employed in this cluster, making up 3.3 percent of the economic sub-market's workforce population. Industries showing the highest projected job openings include:

- Warehousing and Storage
- General Freight Trucking
- Specialized Freight Trucking
- Couriers and Express Delivery Services
- Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance

* Quarterly Census of Employment and Wages (QCEW), a federal-state cooperative program, for the period April 2013 through March 2014.

INDUSTRY CLUSTER DEFINITIONS

The following is a list of the North American Industry Classification System (NAICS) codes and corresponding industries that fall under each of the top 10 industry clusters in the San Joaquin Valley Economic Sub-Market.**

Agriculture, Food, and Beverage Processing

1111	Oilseed and Grain Farming
1112	Vegetable and Melon Farming
1113	Fruit and Tree Nut Farming
1114	Greenhouse, Nursery, and Floriculture Production
1119	Other Crop Farming
1121	Cattle Ranching and Farming
1122	Hog and Pig Farming
1123	Poultry and Egg Production
1124	Sheep and Goat Farming
1125	Aquaculture
1129	Other Animal Production
1151	Support Activities for Crop Production
1152	Support Activities for Animal Production
3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3261	Plastics Product Manufacturing

Health Care Services

6211	Offices of Physicians
6212	Offices of Dentists
6213	Offices of Other Health Practitioners
6214	Outpatient Care Centers
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6219	Other Ambulatory Health Care Services
6221	General Medical and Surgical Hospitals
6222	Psychiatric and Substance Abuse Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities (Skilled Nursing Facilities)
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
6239	Other Residential Care Facilities

Retail

4411	Automobile Dealers
4412	Other Motor Vehicle Dealers
4413	Automotive Parts, Accessories, and Tire Stores
4431	Electronics and Appliance Stores
4441	Building Material and Supplies Dealers
4451	Grocery Stores
4452	Specialty Food Stores
4453	Beer, Wine, and Liquor Stores
4461	Health and Personal Care Stores
4471	Gasoline Stations
4481	Clothing Stores
4482	Shoe Stores
4483	Jewelry, Luggage, and Leather Goods Stores
4511	Sporting Goods, Hobby, and Musical Instrument Stores
4521	Department Stores
4529	Other General Merchandise Stores
4532	Office Supplies, Stationery, and Gift Stores
4533	Used Merchandise Stores
4542	Vending Machine Operators

Hospitality and Tourism

4871	Scenic and Sightseeing Transportation, Land
4872	Scenic and Sightseeing Transportation, Water
4879	Scenic and Sightseeing Transportation, Other
5615	Travel Arrangement and Reservation Services
7121	Museums, Historical Sites, and Similar Institutions
7131	Amusement Parks and Arcades
7132	Gambling Industries
7139	Other Amusement and Recreation Industries
7211	Traveler Accommodation
7212	RV (Recreational Vehicle) Parks and Recreational Camps
7213	Rooming and Boarding Houses
7223	Special Food Services
7224	Drinking Places (Alcoholic Beverages)
7225	Restaurants and Other Eating Places

Education and Training

6111	Elementary and Secondary Schools
6112	Junior Colleges
6113	Colleges, Universities, and Professional Schools
6114	Business Schools and Computer and Management Training
6115	Technical and Trade Schools
6116	Other Schools and Instruction
6117	Educational Support Services

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INDUSTRY CLUSTER DEFINITIONS

Business Services

5511 Management of Companies and Enterprises
 5611 Office Administrative Services
 5612 Facilities Support Services
 5613 Employment Services
 5614 Business Support Services
 5616 Investigation and Security Services
 5617 Services to Buildings and Dwellings
 5619 Other Support Services
 5621 Waste Collection
 5622 Waste Treatment and Disposal
 5629 Remediation and Other Waste Management Services

Construction Materials and Services

2123 Nonmetallic Mineral Mining and Quarrying
 2213 Water, Sewage and Other Systems
 2361 Residential Building Construction
 2362 Nonresidential Building Construction
 2372 Land Subdivision
 2373 Highway, Street, and Bridge Construction
 2379 Other Heavy and Civil Engineering Construction
 2381 Foundation, Structure, and Building Exterior Contractors
 2382 Building Equipment Contractors
 2383 Building Finishing Contractors
 2389 Other Specialty Trade Contractors
 3211 Sawmills and Wood Preservation
 3271 Clay Product and Refractory Manufacturing
 3272 Glass and Glass Product Manufacturing
 3273 Cement and Concrete Product Manufacturing
 3274 Lime and Gypsum Product Manufacturing
 3279 Other Nonmetallic Mineral Product Manufacturing
 3339 Other General Purpose Machinery Manufacturing
 3351 Electric Lighting Equipment Manufacturing

Social Services

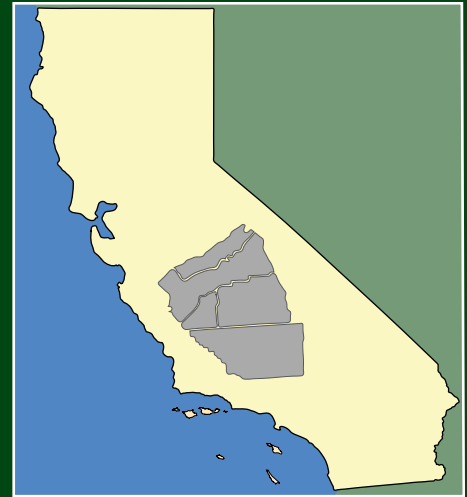
6241 Individual and Family Services
 6242 Community Food and Housing, and Emergency and Other Relief Services
 6243 Vocational Rehabilitation Services
 6244 Child Day Care Services

Financial Services and Real Estate

5211 Monetary Authorities-Central Bank
 5221 Depository Credit Intermediation
 5222 Nondepository Credit Intermediation
 5223 Activities Related to Credit Intermediation
 5231 Securities and Commodity Contracts Intermediation and Brokerage
 5232 Securities and Commodity Exchanges
 5239 Other Financial Investment Activities
 5241 Insurance Carriers
 5242 Agencies, Brokerages, and Other Insurance Related Activities
 5251 Insurance and Employee Benefit Funds
 5259 Other Investment Pools and Funds
 5311 Lessors of Real Estate
 5312 Offices of Real Estate Agents and Brokers
 5313 Activities Related to Real Estate

Transportation and Logistics

3365 Railroad Rolling Stock Manufacturing
 3366 Ship and Boat Building
 4811 Scheduled Air Transportation
 4812 Nonscheduled Air Transportation
 4821 Rail Transportation
 4831 Deep Sea, Coastal, and Great Lakes Water Transportation
 4832 Inland Water Transportation
 4841 General Freight Trucking
 4842 Specialized Freight Trucking
 4851 Urban Transit Systems
 4852 Interurban and Rural Bus Transportation
 4853 Taxi and Limousine Service
 4854 School and Employee Bus Transportation
 4855 Charter Bus Industry
 4859 Other Transit and Ground Passenger Transportation
 4881 Support Activities for Air Transportation
 4882 Support Activities for Rail Transportation
 4883 Support Activities for Water Transportation
 4884 Support Activities for Road Transportation
 4885 Freight Transportation Arrangement
 4889 Other Support Activities for Transportation
 4921 Couriers and Express Delivery Services
 4922 Local Messengers and Local Delivery
 4931 Warehousing and Storage
 5321 Automotive Equipment Rental and Leasing
 8113 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance



Occupational Analysis: Agriculture, Food, and Beverage Processing Cluster

San Joaquin Valley Economic Sub-Market
Fresno, Kern, Kings, Madera, and Tulare Counties

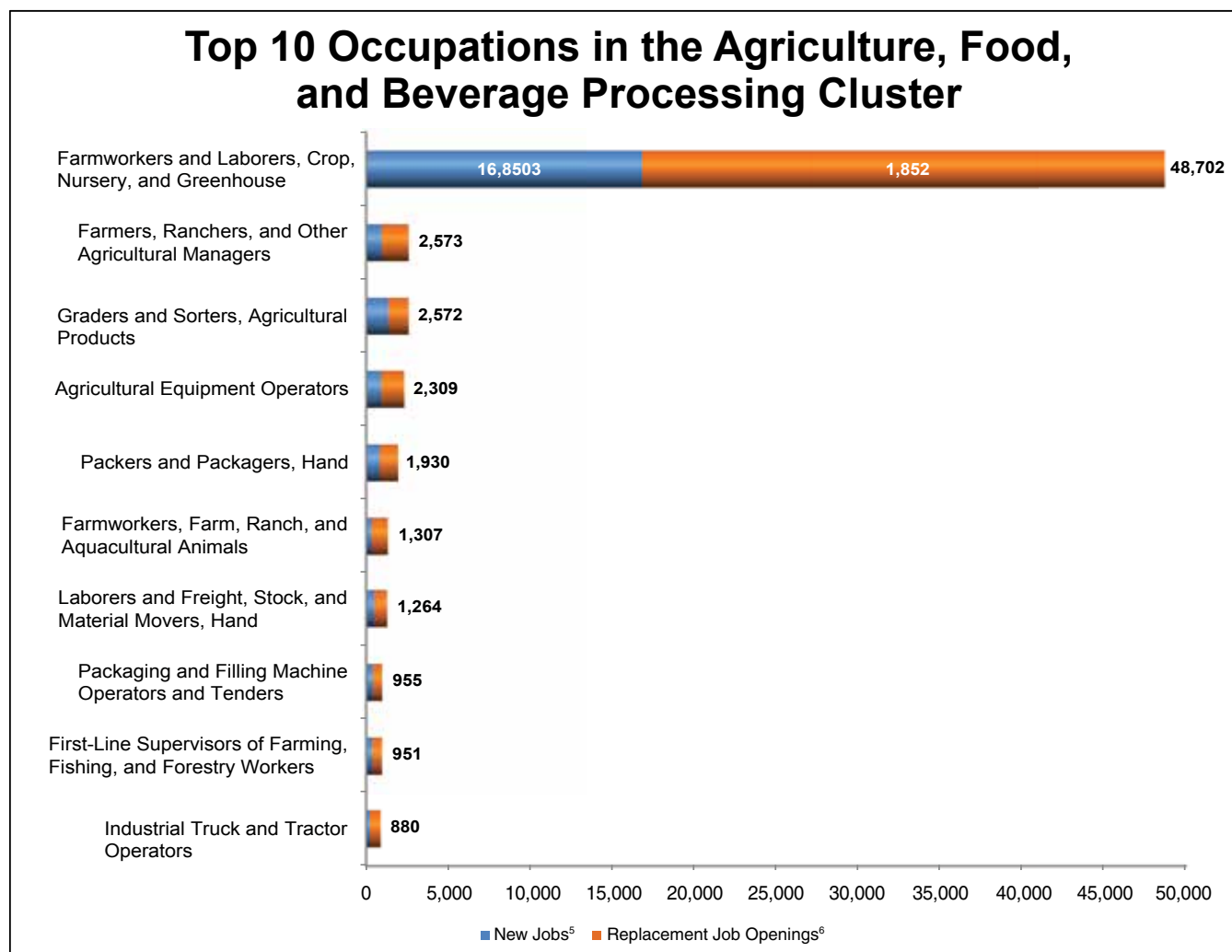
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What is the Agriculture, Food, and Beverage Processing Cluster?

The Agriculture, Food, and Beverage Processing cluster is comprised of 26 industries related to crop and animal farming as well as food and beverage manufacturing. The workers employed within this cluster span all skill levels and share skills and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Agriculture, Food, and Beverage Processing Cluster

The graph below identifies the top 10 occupations in the Agriculture, Food, and Beverage Processing cluster, based on the San Joaquin Valley Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent more than three-fourths of the 79,245 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, coordination, critical thinking, and monitoring.⁴



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

⁴ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

⁵ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

⁶ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

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Top 10 Occupations and Recent Job Demand in the Agriculture, Food, and Beverage Processing Cluster

The table below further profiles the San Joaquin Valley Economic Sub-Market's** top 10 occupations in the Agriculture, Food, and Beverage Processing cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ⁷ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ⁸	HWOL Job Ads ⁹ (120 days)
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	48,702	\$9.14	\$19,010	Less than high school	41
Farmers, Ranchers, and Other Agricultural Managers	2,573	\$43.23	\$89,913	High school diploma or equivalent	50
Graders and Sorters, Agricultural Products	2,572	\$9.15	\$19,030	Less than high school	7
Agricultural Equipment Operators	2,309	\$10.27	\$21,361	Less than high school	20
Packers and Packagers, Hand	1,930	\$9.47	\$19,693	Less than high school	48
Farmworkers, Farm, Ranch, and Aquacultural Animals	1,307	\$10.84	\$22,548	Less than high school	48
Laborers and Freight, Stock, and Material Movers, Hand	1,264	\$11.18	\$23,248	Less than high school	498
Packaging and Filling Machine Operators and Tenders	955	\$11.83	\$24,596	High school diploma or equivalent	42
First-Line Supervisors of Farming, Fishing, and Forestry Workers	951	\$15.29	\$31,796	High school diploma or equivalent	41
Industrial Truck and Tractor Operators	880	\$12.65	\$26,307	Less than high school	288

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 15, 2015.

⁷ Total job openings are the sum of new jobs and replacement job openings.

⁸ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

⁹ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

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Top Occupations for the Agriculture, Food, and Beverage Processing Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Agriculture, Food, and Beverage Processing cluster. The table includes the San Joaquin Valley Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ¹⁰ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
General and Operations Managers	300	\$42.65	\$88,719	283
Accountants and Auditors	231	\$29.93	\$62,261	649
Industrial Production Managers	177	\$40.51	\$84,262	68
Food Scientists and Technologists	120	\$26.13	\$54,358	15
Financial Managers	88	\$46.27	\$96,245	275
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Heavy and Tractor-Trailer Truck Drivers	534	\$18.25	\$37,956	3,612
First-Line Supervisors of Production and Operating Workers	321	\$26.55	\$55,238	691
Agricultural and Food Science Technicians	187	\$17.66	\$36,748	33
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	35	\$20.64	\$42,927	237
Electrical and Electronics Repairers, Commercial and Industrial Equipment	24	\$28.57	\$59,426	17
Requires a High School Diploma or Equivalent or Less				
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	48,702	\$9.14	\$19,010	41
Farmers, Ranchers, and Other Agricultural Managers	2,573	\$43.23	\$89,913	50
Graders and Sorters, Agricultural Products	2,572	\$9.15	\$19,030	7
Agricultural Equipment Operators	2,309	\$10.27	\$21,361	20
Packers and Packagers, Hand	1,930	\$9.47	\$19,693	48

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending April 15, 2015.

¹⁰ Total job openings are the sum of new jobs and replacement job openings.

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Skill Requirements in the Agriculture, Food, and Beverage Processing Cluster

The table below lists the 10 top skills required for top occupations in the Agriculture, Food, and Beverage Processing cluster, categorized by entry-level education requirements. Active listening and critical thinking are the most commonly shared skills, followed by speaking, monitoring, and reading comprehension. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills																			
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Equipment Maintenance	Installation	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Operation and Control	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Repairing	Science
Requires a Bachelor's Degree or Higher																				
General and Operations Managers	•	•		•	•						•		•				•			•
Accountants and Auditors ¹¹	•	•			•				•			•	•				•			•
Industrial Production Managers	•	•		•	•				•		•		•				•			•
Food Scientists and Technologists	•	•	•	•	•				•				•				•			•
Financial Managers ¹²	•	•			•					•			•			•	•			•
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Heavy and Tractor-Trailer Truck Drivers		•	•		•	•							•	•	•		•			•
First-Line Supervisors of Production and Operating Workers		•		•	•						•		•				•		•	•
Agricultural and Food Science Technicians ¹³	•	•	•		•							•	•				•		•	•
Heating, Air Conditioning, and Refrigeration Mechanics and Installers ¹⁴		•		•	•	•	•									•	•	•		•
Electrical and Electronics Repairers, Commercial and Industrial Equipment		•	•		•	•								•	•	•	•	•		•
Requires a High School Diploma or Equivalent or Less																				
Farmworkers and Laborers, Crop, Nursery, and Greenhouse ¹⁵		•		•	•	•		•			•		•	•	•		•			
Farmers, Ranchers, and Other Agricultural Managers ¹⁶		•			•		•				•		•				•		•	•
Graders and Sorters, Agricultural Products		•	•	•	•			•					•		•				•	
Agricultural Equipment Operators		•		•	•	•							•	•		•	•			•
Packers and Packagers, Hand		•		•	•			•				•				•	•		•	•

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹¹ Skills represent Accountants, a specialty occupation of Accountants and Auditors.

¹² Skills represent Financial Managers, Branch or Department, a specialty occupation of Financial Managers.

¹³ Skills represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

¹⁴ Skills represent Heating and Air Conditioning Mechanics and Installers, a specialty occupation of Heating, Air Conditioning, and Refrigeration Mechanics Installers.

¹⁵ Skills represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

¹⁶ Skills represent Nursery and Greenhouse Managers, a specialty occupation of Farmers, Ranchers and other Agricultural Managers.

Work Activities in the Agriculture, Food, and Beverage Processing Cluster

The table below lists the 10 top work activities required for top occupations in the Agriculture, Food, and Beverage Processing cluster, categorized by entry-level education requirements. The most common include organizing, planning, and prioritizing work; making decisions and solving problems; and establishing and maintaining interpersonal relationships.

Occupations	Work Activities																														
	Analyzing Data or Information	Coaching and Developing Others	Communicating with Persons Outside Organization	Communicating with Supervisors, Peers, or Subordinates	Controlling Machines and Processes	Coordinating the Work and Activities of Others	Documenting/Recording Information	Establishing and Maintaining Interpersonal Relationships	Evaluating Information to Determine Compliance with Standards	Getting Information	Guiding, Directing, and Motivating Subordinates	Handling and Moving Objects	Identifying Objects, Actions, and Events	Inspecting Equipment, Structures, or Material	Interacting With Computers	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Operating Vehicles, Mechanized Devices, or Equipment	Organizing, Planning, and Prioritizing Work	Performing Administrative Activities	Performing General Physical Activities	Processing Information	Provide Consultation and Advice to Others	Repairing and Maintaining Electronic Equipment	Repairing and Maintaining Mechanical Equipment	Resolving Conflicts and Negotiating with Others	Scheduling Work and Activities	Thinking Creatively	Training and Teaching Others	Updating and Using Relevant Knowledge
Requires a Bachelor's Degree or Higher																															
General and Operations Managers			●	●		●		●								●		●		●							●	●	●		
Accountants and Auditors ¹⁷	●			●				●	●	●						●				●	●		●								●
Industrial Production Managers				●		●		●			●					●	●	●		●							●	●			
Food Scientists and Technologists	●					●				●			●			●	●			●			●							●	●
Financial Managers ¹⁸		●		●		●		●			●				●	●				●								●			●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																															
Heavy and Tractor-Trailer Truck Drivers					●			●		●		●	●	●		●			●	●		●									
First-Line Supervisors of Production and Operating Workers		●		●	●	●		●			●	●											●				●	●			
Agricultural and Food Science Technicians ¹⁹										●		●	●			●	●			●		●	●							●	●
Heating, Air Conditioning, and Refrigeration Mechanics and Installers ²⁰	●					●						●		●		●				●		●			●	●					●
Electrical and Electronics Repairers, Commercial and Industrial Equipment				●			●	●				●				●	●			●					●	●					●
Requires a High School Diploma or Equivalent or Less																															
Farmworkers and Laborers, Crop, Nursery, and Greenhouse ²¹					●			●		●	●	●	●						●			●								●	●
Farmers, Ranchers, and Other Agricultural Managers ²²						●		●		●	●					●	●			●						●		●		●	●
Graders and Sorters, Agricultural Products				●	●	●		●		●		●		●						●		●									●
Agricultural Equipment Operators					●					●		●		●		●	●		●	●	●					●					
Packers and Packagers, Hand				●	●			●		●		●	●				●			●	●						●				

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

¹⁷ Work Activities represent Accountants, a specialty occupation of Accountants and Auditors.

¹⁸ Work Activities represent Financial Managers, Branch or Department, a specialty occupation of Financial Managers.

¹⁹ Work Activities represent Agricultural Technicians, a specialty occupation of Agricultural and Food Science Technicians.

²⁰ Work Activities represent Heating and Air Conditioning Mechanics and Installers, a specialty occupation of Heating, Air Conditioning, and Refrigeration Mechanics and Installers.

²¹ Work Activities represent Farmworkers and Laborers, Crop, a specialty occupation of Farmworkers and Laborers, Crop, Nursery, and Greenhouse.

²² Work Activities represent Nursery and Greenhouse Managers, a specialty occupation of Farmers, Ranchers and other Agricultural Managers.

Related Occupations for the Agriculture, Food, and Beverage Processing Cluster

The table below lists top occupations in the Agriculture, Food, and Beverage Processing cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Agriculture, Food, and Beverage Processing cluster occupations.

Agriculture, Food, and Beverage Processing Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
General and Operations Managers	<ul style="list-style-type: none"> Logistics Managers Administrative Services Managers Storage and Distribution Managers
Accountants and Auditors	<ul style="list-style-type: none"> Financial Analysts Compensation, Benefits, and Job Analysis Specialists Risk Management Specialists
Industrial Production Managers	<ul style="list-style-type: none"> Industrial Engineers General and Operations Managers Food Service Managers
Food Scientists and Technologists	<ul style="list-style-type: none"> Biochemical Engineers Validation Engineers Energy Engineers
Financial Managers	<ul style="list-style-type: none"> Sales Managers Human Resources Specialists Marketing Managers
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Heavy and Tractor-Trailer Truck Drivers	<ul style="list-style-type: none"> Light Truck or Delivery Services Drivers Excavating and Loading Machine and Dragline Operators Highway Maintenance Workers
First-Line Supervisors of Production and Operating Workers	<ul style="list-style-type: none"> First-Line Supervisors of Mechanics, Installers, and Repairers First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators
Agricultural and Food Science Technicians	<ul style="list-style-type: none"> Precision Agriculture Technicians Agricultural Inspectors Biological Technicians
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	<ul style="list-style-type: none"> Electricians Plumbers Pipe Fitters and Steamfitters
Electrical and Electronics Repairers, Commercial and Industrial Equipment	<ul style="list-style-type: none"> Mechanical Engineering Technicians Manufacturing Production Technicians Robotics Technicians
Requires a High School Diploma or Equivalent or Less	
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	<ul style="list-style-type: none"> Landscaping and Groundskeeping Workers Nursery Workers Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Farmers, Ranchers, and Other Agricultural Managers	<ul style="list-style-type: none"> First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators First-Line Supervisors of Aquacultural Workers
Graders and Sorters, Agricultural Products	<ul style="list-style-type: none"> Food Preparation Workers Dining Room and Cafeteria Attendants and Bartender Helpers Stock Clerks- Stockroom, Warehouse, or Storage Yard
Agricultural Equipment Operators	<ul style="list-style-type: none"> Helpers--Carpenters Pile-Driver Operators Refuse and Recyclable Material Collectors
Packers and Packagers, Hand	<ul style="list-style-type: none"> Cooks, Fast Food Shipping, Receiving, and Traffic Clerks Inspectors, Testers, Sorters, Samplers, and Weighers

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Agriculture, Food, and Beverage Processing Cluster

The following table lists the San Joaquin Valley Economic Sub-Market** employers in the Agriculture, Food, and Beverage Processing cluster who posted the most job advertisements during the 120-day period ending April 15, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day period.

Agriculture, Food, and Beverage Processing Cluster Employers	Recent Job Advertisements ²³ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Paramount Citrus	69	72	-3	-4.2%
Paramount Farms	51	4	47	1,175.0%
Constellation Brands Inc.	31	12	19	158.3%
PepsiCo	25	25	0	0.0%
Grimmway Farms	24	31	-7	-22.6%
Bimbo Bakeries	21	7	14	200.0%
Kraft	21	14	7	50.0%
Coca-Cola Refreshments	20	33	-13	-39.4%
Neil Jones Food Company	19	22	-3	-13.6%
Land O' Lakes	18	29	-11	-37.9%
Foster Farms	15	14	1	7.1%
Nestle	13	16	-3	-18.8%
Dr Pepper Snapple Group	12	15	-3	-20.0%
Wm. Bolthouse Farms, Inc.	11	17	-6	-35.3%
Del Monte	10	12	-2	-16.7%
The Neil Jones Food Co dba Toma-Tek	10	0	10	—
Advanced Drainage Systems, Inc.	10	2	8	400.0%
Rich Products Corporation	9	2	7	350.0%
Landmark Vineyards	9	0	9	—
Leprino Foods Company	9	5	4	80.0%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 15, 2015.

²³ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Instructional Programs for the Top Agriculture, Food, and Beverage Processing Cluster Occupations

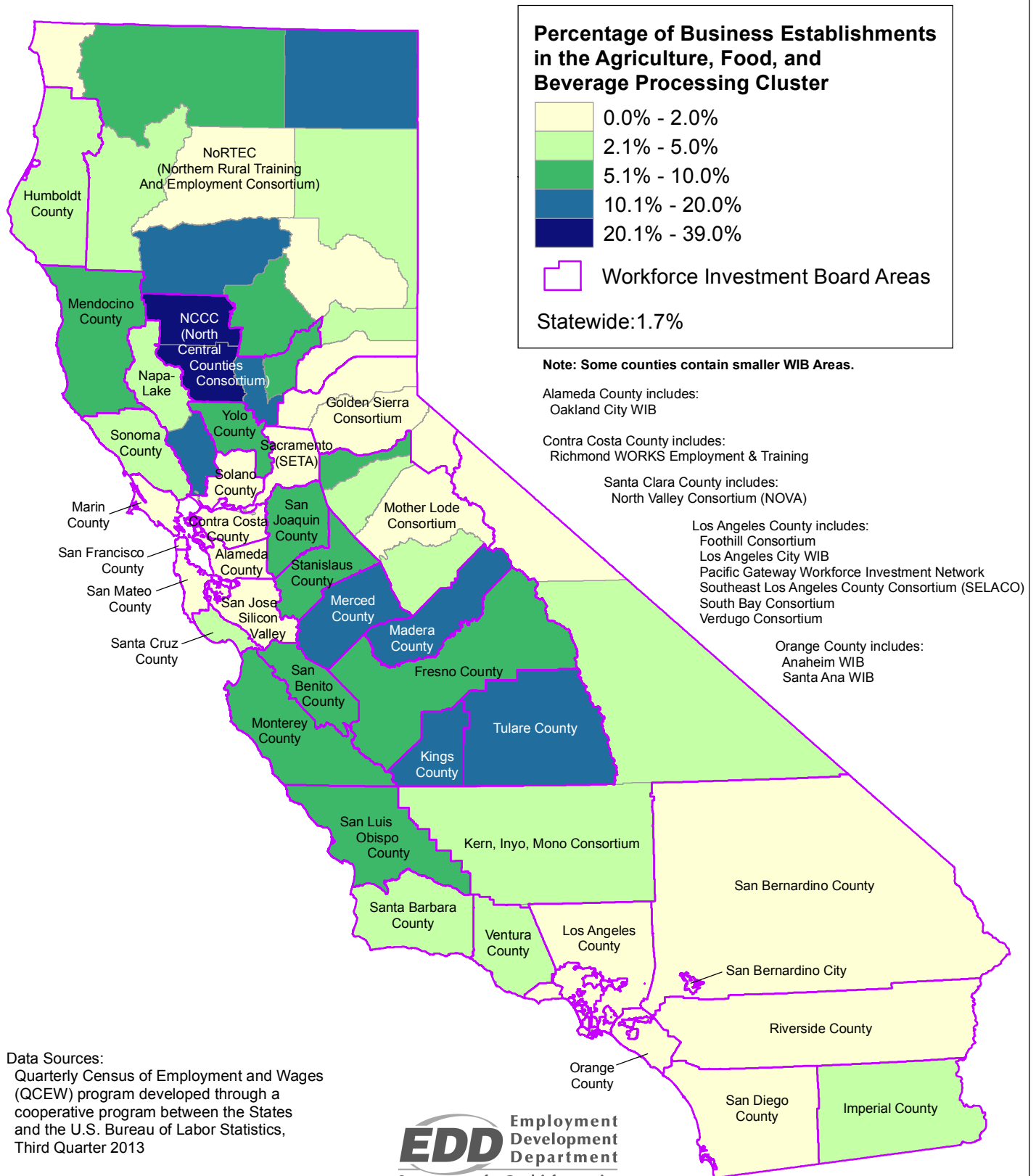
The table below provides examples of instructional programs related to some of the top occupations in the Agriculture, Food, and Beverage Processing cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Agriculture, Food, and Beverage Processing cluster. To view a more complete list of training programs, select the source links under the table below. The Taxonomy of Programs categorizes and describes instructional programs only for California Community Colleges.

Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Heavy and Tractor-Trailer Truck Drivers	49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	094750	Truck and Bus Driving
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A
Agricultural and Food Science Technicians	01.1002	Food Technology and Processing	011300	Food Processing and Related Technologies
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	15.0501	Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician	094600	Environmental Control Technology
	47.0201	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician		
Electrical and Electronics Repairers, Commercial and Industrial Equipment	47.0104	Computer Installation and Repair Technology/Technician	093410	Computer Electronics
	47.0105	Industrial Electronics Technology/Technician	093420	Industrial Electronics
Farmers, Ranchers, and Other Agricultural Managers	01.0101	Agricultural Business and Management, General	010230	Dairy Science
	01.0304	Crop Production	010400	Viticulture, Enology, and Wine Business
	01.0901	Animal Sciences, General	010900	Horticulture
Graders and Sorters, Agricultural Products	01.0105	Agricultural/Farm Supplies Retailing and Wholesaling	N/A	N/A

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](https://nces.ed.gov/ipeds/) at www.nces.ed.gov; [California Community Colleges TOP-to-CIP Crosswalk](http://www.cccco.edu) 7th Edition (2010), www.cccco.edu.

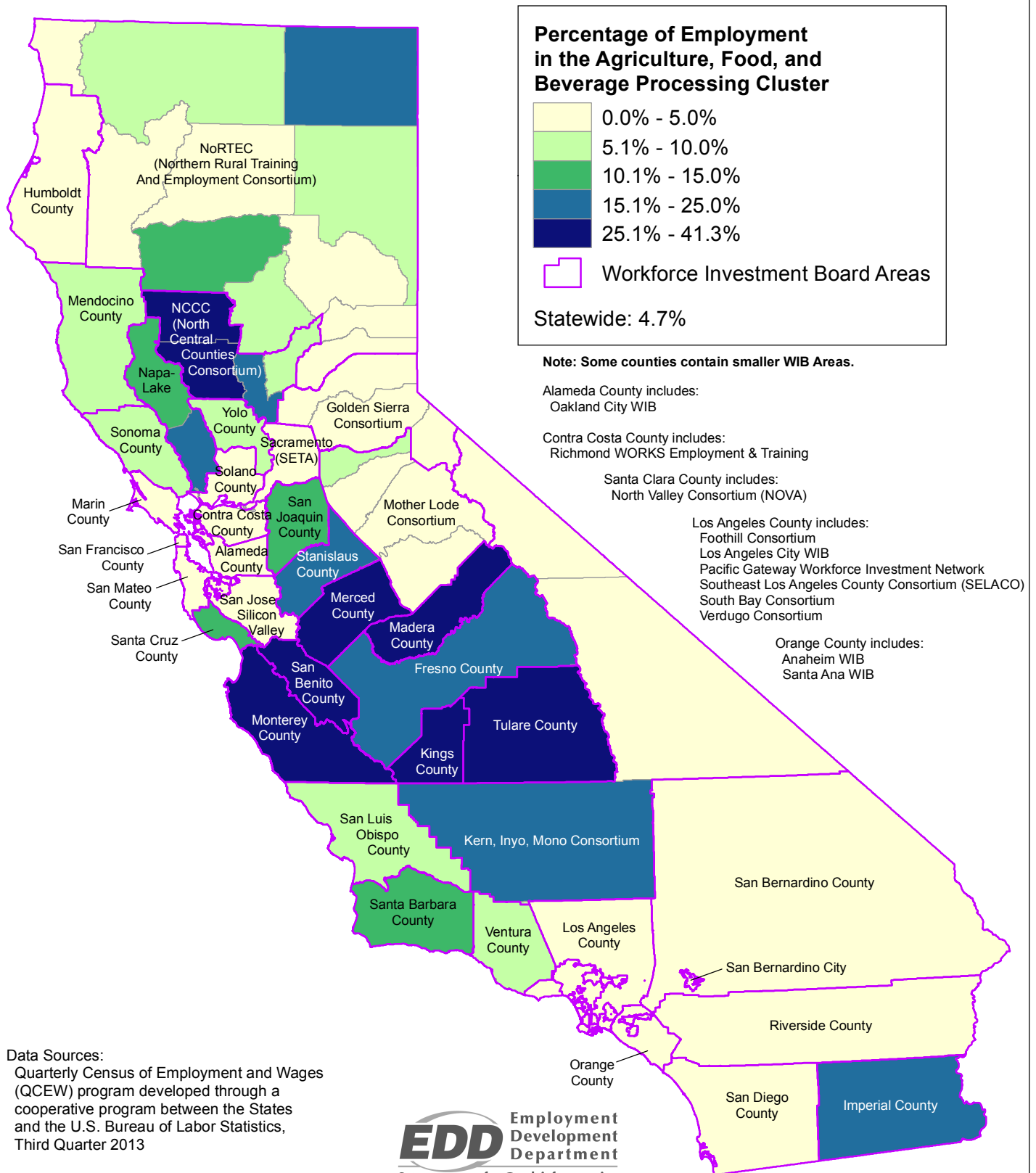
California Agriculture, Food, and Beverage Processing Cluster

Percentage of Total County Establishments, 2013



California Agriculture, Food, and Beverage Processing Cluster

Percentage of Total County Employment, 2013



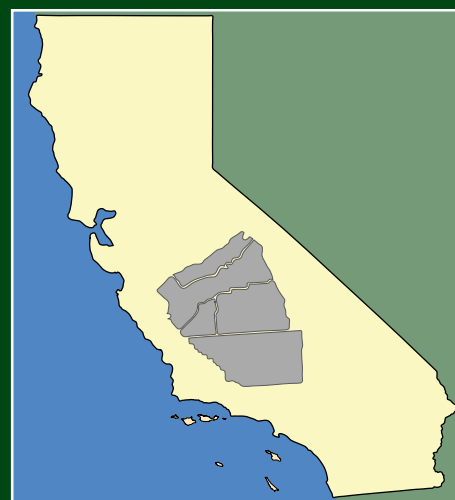
Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

Cartography by:
Labor Market Information Division
California Employment Development Department
<http://www.labormarketinfo.edd.ca.gov>
July 2014

EDD Employment Development Department
State of California

LaborMarketInfo

File T036



Occupational Analysis: Health Care Services Cluster

San Joaquin Valley Economic Sub-Market
Fresno, Kern, Kings, Madera, and Tulare Counties

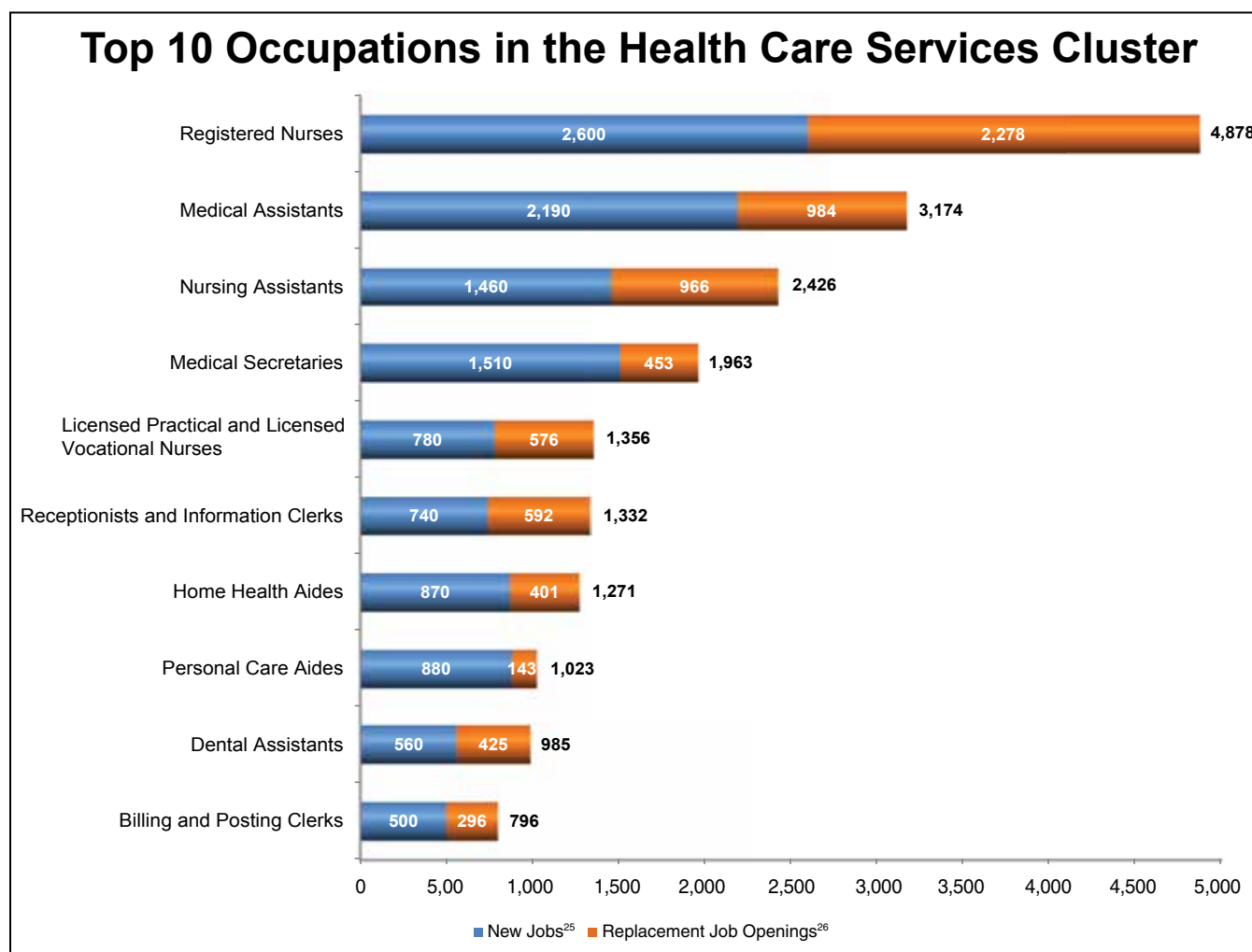
April 2015

What is the Health Care Services Cluster?

The Health Care Services cluster is comprised of 14 industries that include hospitals and doctors' offices, diagnostic laboratories, continuing care retirement communities, home health care services, and other activities related to health care. The workers employed within this cluster span all skill levels and share skills and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Health Care Services Cluster

The graph below identifies the top 10 occupations in the Health Care Services cluster, based on the San Joaquin Valley Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent nearly one-half of the 40,056 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, critical thinking, reading comprehension, social perceptiveness and speaking.²⁴



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

²⁴ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

²⁵ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

²⁶ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Top 10 Occupations and Recent Job Demand in the Health Care Services Cluster

The table below further profiles the San Joaquin Valley Economic Sub-Market's** top 10 occupations in the Health Care Services cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBS™ (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ²⁷ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ²⁸	HWOL Job Ads ²⁹ (120 days)
Registered Nurses	4,878	\$37.94	\$78,905	Associate's degree	3,304
Medical Assistants	3,174	\$13.54	\$28,151	Postsecondary non-degree award	458
Nursing Assistants	2,426	\$11.80	\$24,547	Postsecondary non-degree award	328
Medical Secretaries	1,963	\$16.53	\$34,383	High school diploma or equivalent	744
Licensed Practical and Licensed Vocational Nurses	1,356	\$23.56	\$49,003	Postsecondary non-degree award	591
Receptionists and Information Clerks	1,332	\$12.13	\$25,215	High school diploma or equivalent	1,344
Home Health Aides	1,271	\$10.25	\$21,319	Less than high school	255
Personal Care Aides	1,023	\$9.27	\$19,284	Less than high school	488
Dental Assistants	985	\$14.78	\$30,749	Postsecondary non-degree award	266
Billing and Posting Clerks	796	\$15.84	\$32,957	High school diploma or equivalent	165

Source: California Employment Development Department, Projections of Employment 2012-2022; Occupational Employment Statistics Wage Survey, updated to 4th Q, 2014; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 15, 2015.

²⁷ Total job openings are the sum of new jobs and replacement job openings.

²⁸ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

²⁹ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Top Occupations for the Health Care Services Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Health Care Services cluster. The table includes the San Joaquin Valley Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ³⁰ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
Medical and Health Services Managers	577	\$51.34	\$106,785	539
Family and General Practitioners	448	\$83.41	\$173,487	128
Nurse Practitioners	406	\$54.81	\$114,018	102
Physical Therapists	377	\$44.17	\$91,872	464
Physician Assistants	375	\$53.32	\$110,907	239
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Registered Nurses	4,878	\$37.94	\$78,905	3,304
Medical Assistants	3,174	\$13.54	\$28,151	458
Nursing Assistants	2,426	\$11.80	\$24,547	328
Licensed Practical and Licensed Vocational Nurses	1,356	\$23.56	\$49,003	591
Dental Assistants	985	\$14.78	\$30,749	266
Requires a High School Diploma or Equivalent or Less				
Medical Secretaries	1,963	\$16.53	\$34,383	744
Receptionists and Information Clerks	1,332	\$12.13	\$25,215	1,344
Home Health Aides	1,271	\$10.25	\$21,319	255
Personal Care Aides	1,023	\$9.27	\$19,284	488
Billing and Posting Clerks	796	\$15.84	\$32,957	165

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; *The Conference Board Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending April 15, 2015.

³⁰ Total job openings are the sum of new jobs and replacement job openings.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Skill Requirements in the Health Care Services Cluster

The table below lists the 10 top skills required for top occupations in the Health Care Services cluster, categorized by entry-level education requirements. Active listening and critical thinking are the most commonly shared skills, followed by reading comprehension, and social perceptiveness. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills														
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Instructing	Judgment and Decision Making	Learning Strategies	Mathematics	Monitoring	Operations Analysis	Reading Comprehension	Science	Service Orientation	Social Perceptiveness
Requires a Bachelor's Degree or Higher															
Medical and Health Services Managers		●		●	●		●			●	●	●			●
Family and General Practitioners	●	●	●		●		●					●	●		●
Nurse Practitioners	●	●			●	●	●			●		●	●		●
Physical Therapists		●		●	●		●			●		●		●	●
Physician Assistants	●	●		●	●					●		●		●	●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree															
Registered Nurses	●	●		●	●			●		●		●		●	●
Medical Assistants	●	●		●	●					●		●		●	●
Nursing Assistants	●	●		●	●					●		●		●	●
Licensed Practical and Licensed Vocational Nurses		●		●	●					●		●		●	●
Dental Assistants	●	●			●	●				●		●		●	●
Requires a High School Diploma or Equivalent or Less															
Medical Secretaries		●		●	●					●		●		●	●
Receptionists and Information Clerks		●	●	●	●							●		●	●
Home Health Aides	●	●		●	●			●		●		●		●	●
Personal Care Aides	●	●		●	●					●		●		●	●
Billing and Posting Clerks ³¹	●	●		●	●				●			●		●	●

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³¹ Skills represent Billing, Cost, and Rate Clerks, a specialty occupation of Billing and Posting Clerks.

Work Activities in the Health Care Services Cluster

The table below lists the 10 top work activities required for top occupations in the Health Care Services cluster, categorized by entry-level education requirements. The most common include establishing and maintaining interpersonal relationships; assisting and caring for others; and identifying objects, actions, and events.

Occupations	Work Activities																								
	Analyzing Data or Information	Assisting and Caring for Others	Coaching and Developing Others	Communicating with Persons Outside Organization	Communicating with Supervisors, Peers, or Subordinates	Coordinating the Work and Activities of Others	Documenting/Recording Information	Establishing and Maintaining Interpersonal Relationships	Evaluating Information to Determine Compliance with Standards	Getting Information	Guiding, Directing, and Motivating Subordinates	Handling and Moving Objects	Identifying Objects, Actions, and Events	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Organizing, Planning, and Prioritizing Work	Performing Administrative Activities	Performing for or Working Directly with the Public	Performing General Physical Activities	Processing Information	Provide Consultation and Advice to Others	Resolving Conflicts and Negotiating with Others	Thinking Creatively	Updating and Using Relevant Knowledge
Requires a Bachelor's Degree or Higher																									
Medical and Health Services Managers			●		●	●		●			●			●		●	●					●	●		
Family and General Practitioners	●	●					●	●		●			●	●	●						●				●
Nurse Practitioners		●					●	●		●			●	●	●		●		●						●
Physical Therapists		●					●	●				●	●	●	●				●				●	●	
Physician Assistants	●	●						●		●			●	●	●				●		●				●
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																									
Registered Nurses		●		●			●		●				●	●	●		●				●				●
Medical Assistants		●		●		●	●		●				●		●		●		●						●
Nursing Assistants		●		●			●		●			●	●	●	●		●				●				
Licensed Practical and Licensed Vocational Nurses		●		●		●	●					●	●	●	●		●								●
Dental Assistants		●					●	●	●			●	●	●	●		●								●
Requires a High School Diploma or Equivalent or Less																									
Medical Secretaries		●		●	●			●		●			●	●			●				●				●
Receptionists and Information Clerks		●				●	●		●				●		●			●	●		●				●
Home Health Aides		●		●		●	●					●	●		●		●				●				●
Personal Care Aides		●		●		●	●					●	●	●	●		●			●					
Billing and Posting Clerks ³²				●	●			●		●				●			●	●	●		●				

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³² Work Activities represent Billing, Cost, and Rate Clerks, a specialty occupation of Billing and Posting Clerks.

Related Occupations for the Health Care Services Cluster

The table below lists top occupations in the Health Care Services cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Health Care Services cluster occupations.

Health Care Services Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
Medical and Health Services Managers	<ul style="list-style-type: none"> • Management Analysts • Social and Community Service Managers • Human Resources Managers
Family and General Practitioners	<ul style="list-style-type: none"> • Physician Assistants • Hospitalists • Health Specialties Teachers, Postsecondary
Nurse Practitioners	<ul style="list-style-type: none"> • Clinical Nurse Specialists • Nurse Midwives • Naturopathic Physicians
Physical Therapists	<ul style="list-style-type: none"> • Health Specialties Teachers, Postsecondary • Nursing Instructors and Teachers, Postsecondary • Occupational Therapists
Physician Assistants	<ul style="list-style-type: none"> • Nurse Anesthetists • Nurse Midwives • Nurse Practitioners
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Registered Nurses	<ul style="list-style-type: none"> • Critical Care Nurses • Respiratory Therapists • Cardiovascular Technologists and Technicians
Medical Assistants	<ul style="list-style-type: none"> • Pharmacy Technicians • Social and Human Service Assistants • Speech-Language Pathology Assistants
Nursing Assistants	<ul style="list-style-type: none"> • N/A
Licensed Practical and Licensed Vocational Nurses	<ul style="list-style-type: none"> • Physical Therapist Assistants • Radiologic Technicians • Occupational Therapy Assistants
Dental Assistants	<ul style="list-style-type: none"> • Endoscopy Technicians • Surgical Technologists • Dental Hygienists
Requires a High School Diploma or Equivalent or Less	
Medical Secretaries	<ul style="list-style-type: none"> • Receptionists and Information Clerks • Medical Records and Health Information Technicians • Bill and Account Collectors
Receptionists and Information Clerks	<ul style="list-style-type: none"> • Office Clerks, General • Medical Records and Health Information Technicians • Customer Service Representatives
Home Health Aides	<ul style="list-style-type: none"> • Personal Care Aides • Physical Therapist Aides • Occupational Therapy Aides
Personal Care Aides	<ul style="list-style-type: none"> • Ambulance Drivers and Attendants, Except Emergency Medical Technicians • Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers • Childcare Workers
Billing and Posting Clerks	<ul style="list-style-type: none"> • Bookkeeping, Accounting, and Auditing Clerks • Executive Secretaries and Executive Administrative Assistants • Legal Secretaries

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Health Care Services Cluster

The following table lists the San Joaquin Valley Economic Sub-Market** employers in the Health Care Services cluster who posted the most job advertisements during the 120-day period ending April 15, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day period.

Health Care Services Cluster Employers	Recent Job Advertisements ³³ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Kern Medical Center	327	1	326	32,600.0%
Children's Hospital Central California	184	171	13	7.6%
Kaiser Permanente	166	50	116	232.0%
Dignity Health	154	435	-281	-64.6%
Kaweah Delta Medical Center	102	67	35	52.2%
Onward Healthcare	101	47	54	114.9%
San Joaquin Community Hospital	88	93	-5	-5.4%
Mercy Hospital	82	15	67	446.7%
Adventist HealthCare	73	52	21	40.4%
American Mobile Healthcare	58	60	-2	-3.3%
Brookdale Senior Living	54	42	12	28.6%
Golden Living	52	53	-1	-1.9%
Optimal Health Services	39	13	26	200.0%
Western Dental	35	22	13	59.1%
Central California Faculty Medical Group	32	34	-2	-5.9%
Delano Regional Medical Center	32	29	3	10.3%
Aureus Medical	29	0	29	—
Saint Agnes Medical Center	28	45	-17	-37.8%
Avalon Health Care, Inc.	28	21	7	33.3%
Clinica Sierra Vista	26	11	15	136.4%

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 15, 2015.

³³ Totals do not include employers with anonymous job advertisements.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Instructional Programs for the Top Health Care Services Cluster Occupations

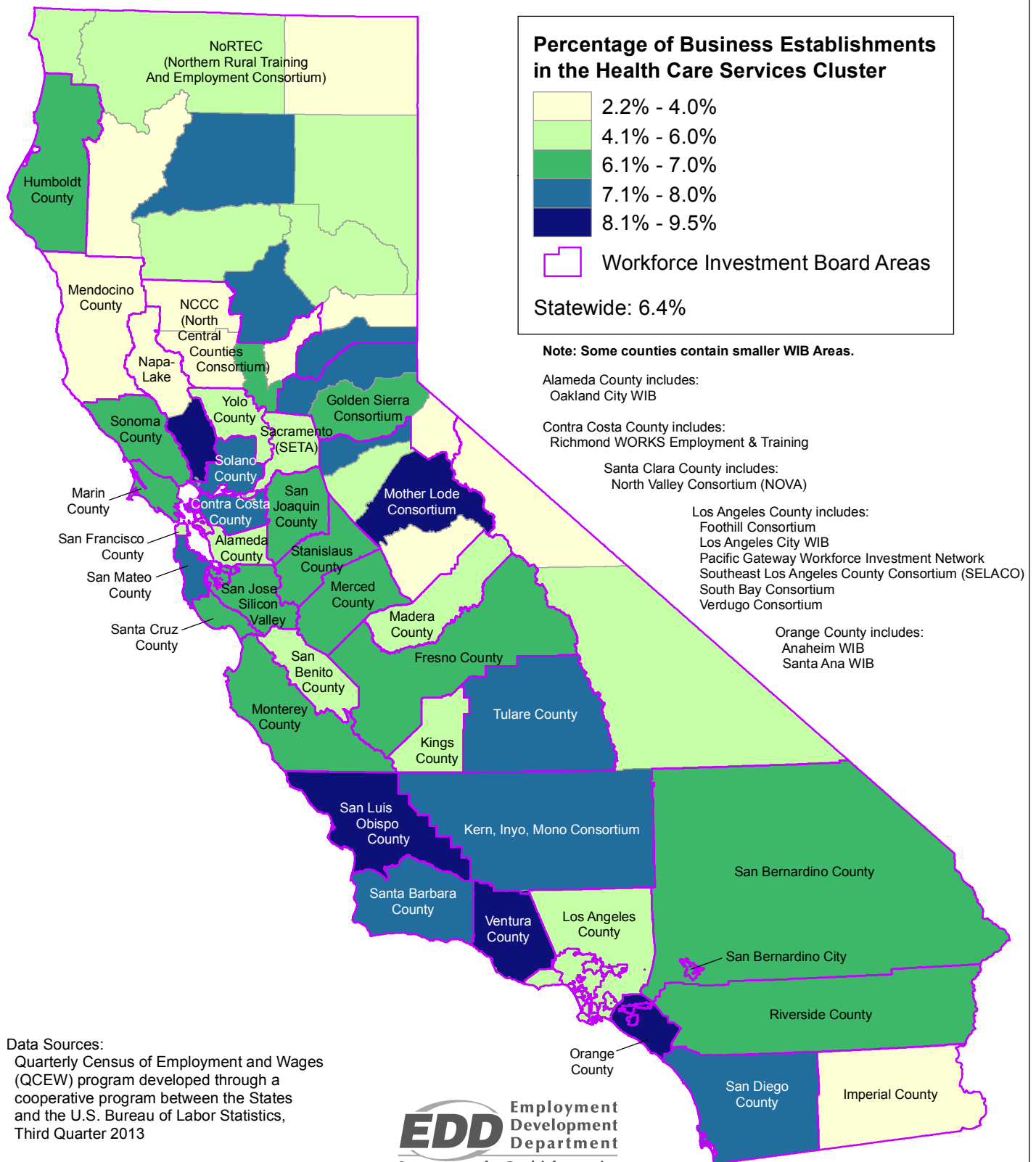
The table below provides examples of instructional programs related to some of the top occupations in the Health Care Services cluster, particularly those that require less than a bachelor's degree. These programs train individuals for occupations throughout many industries and are not limited to the Health Care Services cluster. To view a more complete list of training programs, select the source links under the table below. The Taxonomy of Programs categorizes and describes instructional programs only for California Community Colleges.

Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Registered Nurses	51.3801	Registered Nursing/Registered Nurse	123000	Nursing
	51.3811	Public Health/Community Nurse/ Nursing	123010	Registered Nursing
	51.3816	Emergency Room/Trauma Nursing		
Medical Assistants	51.0710	Medical Office Assistant/Specialist	051420	Medical Office Technology
	51.0713	Medical Insurance Coding Specialist/Coder	120810	Clinical Medical Assisting
	51.0809	Anesthesiologist Assistant	122310	Health Information Coding
Nursing Assistants	51.2601	Health Aide	123030	Certified Nurse Assistant
	51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide		
	51.3999	Practical Nursing, Vocational Nursing and Nursing Assistants, Other		
Licensed Practical and Licensed Vocational Nurses	51.3901	Licensed Practical/Vocational Nurse Training	123020	Licensed Vocational Nursing
	51.3999	Practical Nursing, Vocational Nursing and Nursing Assistants, Other		
Dental Assistants	51.0601	Dental Assisting/Assistant	124010	Dental Assistant
Medical Secretaries	51.0710	Medical Office Assistant/Specialist	051420	Medical Office Technology
	51.0714	Medical Insurance Specialist/ Medical Biller		
	51.0716	Medical Administrative/Executive Assistant and Medical Secretary		
Home Health Aides	51.2602	Home Health Aide/Home Attendant	123080	Home Health Aide
Personal Care Aides	51.2602	Home Health Aide/Home Attendant	123080	Home Health Aide

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](https://nces.ed.gov/ipeds/) at www.nces.ed.gov; [California Community Colleges TOP-to-CIP Crosswalk](http://www.cccco.edu) 7th Edition (2010), www.cccco.edu.

California Health Care Services Cluster

Percentage of Total County Establishments, 2013



Data Sources:
Quarterly Census of Employment and Wages (QCEW) program developed through a cooperative program between the States and the U.S. Bureau of Labor Statistics, Third Quarter 2013

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Labor Market Information Division
California Employment Development Department
<http://www.labormarketinfo.edd.ca.gov>
July 2014

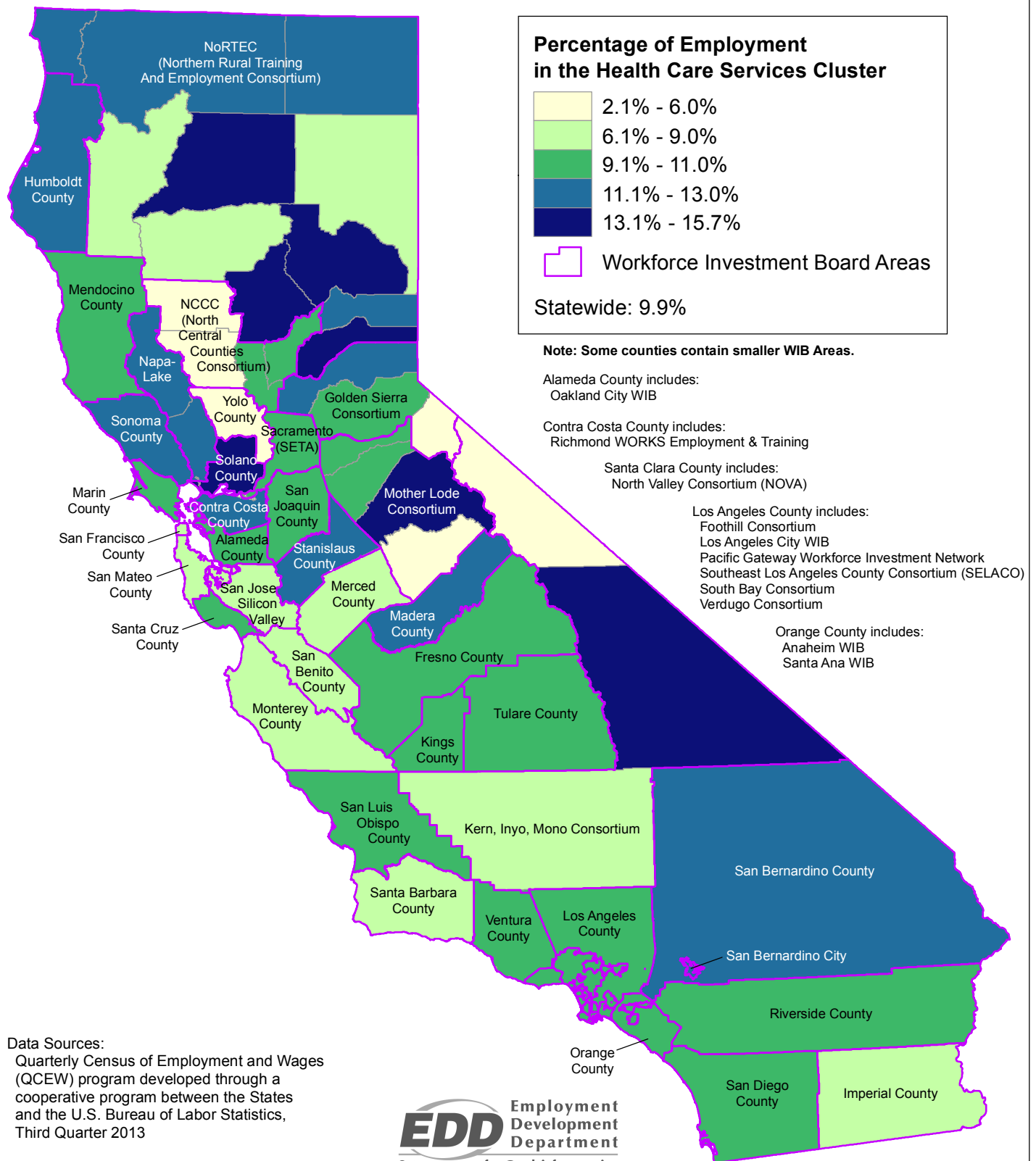
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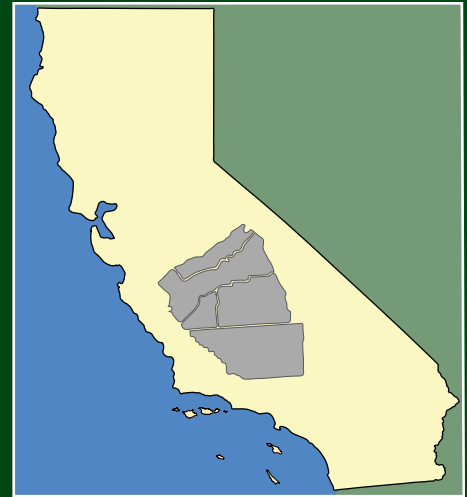
File T036

California Health Care Services Cluster

Percentage of Total County Employment, 2013



File T036



Occupational Analysis: Retail Cluster

San Joaquin Valley Economic Sub-Market
Fresno, Kern, Kings, Madera, and Tulare Counties

April 2015

What is the Retail Cluster?

The Retail cluster is composed of 19 industries involved in the sales of goods both familiar and esoteric, everything from groceries and automobiles to musical instruments and surfboards. The workers employed within this cluster span all skill levels and share skills and work activities both within the cluster and in many other industry clusters, suggesting the potential for skills transference and upward mobility with additional training.

Top 10 Occupations in the Retail Cluster

The graph below identifies the top 10 occupations in the Retail cluster, based on the San Joaquin Valley Economic Sub-Market's** new job growth plus replacement openings. In sum, these 10 occupations represent more than three-fourths of the 37,988 total job openings projected in this cluster between 2012 and 2022. Moreover, many share the same required skills such as active listening, critical thinking, reading comprehension, and speaking.³⁴



Source: California Employment Development Department, *Projections of Employment 2012-2022*. Industry and occupational employment projections for 2012-2022 in this report may not be directly comparable to the published 2012-2022 employment projections available online at www.labormarketinfo.edd.ca.gov.

³⁴ U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

³⁵ New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero.

³⁶ Replacement job openings estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.

** This Economic Sub-Market includes Fresno, Kern, Kings, Madera, and Tulare Counties.

Top 10 Occupations and Recent Job Demand in the Retail Cluster

The table below further profiles the San Joaquin Valley Economic Sub-Market's** top 10 occupations in the Retail cluster by listing the total job openings for 2012-2022, median hourly and annual wages, and entry-level education requirements. Also included are online job advertisements extracted from The Conference Board Help Wanted OnLine™ (HWOL) data series over a 120-day period. HWOL compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBSSM (www.caljobs.ca.gov), California's online job listing system.

Occupations	Total Job Openings ³⁷ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	Entry Level Education ³⁸	HWOL Job Ads ³⁹ (120 days)
Cashiers	10,693	\$9.73	\$20,248	Less than high school	338
Retail Salespersons	9,652	\$10.69	\$22,227	Less than high school	1,389
Stock Clerks and Order Fillers	3,114	\$10.87	\$22,624	Less than high school	520
First-Line Supervisors of Retail Sales Workers	2,489	\$18.30	\$38,055	High school diploma or equivalent	1,290
Combined Food Preparation and Serving Workers, Including Fast Food	1,078	\$9.25	\$19,243	Less than high school	488
Automotive Service Technicians and Mechanics	734	\$17.80	\$37,032	High school diploma or equivalent	405
Laborers and Freight, Stock,	689	\$11.18	\$23,248	Less than high school	498
Parts Salespersons	599	\$14.34	\$29,809	Less than high school	53
Pharmacy Technicians	477	\$17.73	\$36,869	High school diploma or equivalent	115
Packers and Packagers, Hand	474	\$9.47	\$19,693	Less than high school	48

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; The Conference Board Help Wanted OnLine™ (HWOL) Data Series, 120-day period ending April 15, 2015.

³⁷ Total job openings are the sum of new jobs and replacement job openings.

³⁸ U.S. Department of Labor, Bureau of Labor Statistics (BLS) 2012 education levels.

³⁹ Totals represent job advertisements from employers in all industries. One job opening may be represented in more than one job advertisement.

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Top Occupations for the Retail Cluster by Education Level

The table below identifies the occupations with the most total job openings, categorized by Bureau of Labor Statistics (BLS) 2012 entry-level education requirements, within the Retail cluster. The table includes the San Joaquin Valley Economic Sub-Market's** projected total job openings and median hourly and annual wages. In addition, recent totals of online job advertisements over 120-day period are included. Grouping occupations by education levels allows individuals to better gauge the potential for skills transference and upward mobility within the cluster.

Occupations	Total Job Openings ⁴⁰ (2012-2022)	Median Hourly Wage (2014)	Median Annual Wage (2014)	HWOL Job Ads (120 days)
Requires a Bachelor's Degree or Higher				
General and Operations Managers	401	\$42.65	\$88,719	283
Pharmacists	311	\$67.12	\$139,616	213
Sales Managers	209	\$40.97	\$85,207	342
Loan Officers	56	\$37.80	\$78,623	214
Accountants and Auditors	34	\$29.93	\$62,261	649
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree				
Heavy and Tractor-Trailer Truck Drivers	57	\$18.25	\$37,956	3,612
First-Line Supervisors of Production and Operating Workers	57	\$26.55	\$55,238	691
Computer, Automated Teller, and Office Machine Repairers	37	\$21.10	\$43,897	7
Hairdressers, Hairstylists, and Cosmetologists	26	\$10.33	\$21,466	253
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	25	\$20.64	\$42,927	237
Cashiers	10,693	\$9.73	\$20,248	338
Retail Salespersons	9,652	\$10.69	\$22,227	1,389
Stock Clerks and Order Fillers	3,114	\$10.87	\$22,624	520
First-Line Supervisors of Retail Sales Workers	2,489	\$18.30	\$38,055	1,290
Combined Food Preparation and Serving Workers, Including Fast Food	1,078	\$9.25	\$19,243	488

Source: California Employment Development Department, *Projections of Employment 2012-2022*; *Occupational Employment Statistics Wage Survey*, updated to 4th Q, 2014; The Conference Board *Help Wanted OnLine™ (HWOL) Data Series*, 120-day period ending April 15, 2015.

⁴⁰ Total job openings are the sum of new jobs and replacement job openings.

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Skill Requirements in the Retail Cluster

The table below lists the 10 top skills required for top occupations in the Retail cluster, categorized by entry-level education requirements. Critical thinking and speaking are the most commonly shared skills, followed by active listening and reading comprehension. The skills and work activities identified for each occupation are from the U.S. Department of Labor's Occupational Information Network (O*NET).

Occupations	Skills																			
	Active Learning	Active Listening	Complex Problem Solving	Coordination	Critical Thinking	Equipment Maintenance	Installation	Instructing	Judgment and Decision Making	Learning Strategies	Management of Personnel Resources	Mathematics	Monitoring	Negotiation	Operation and Control	Operation Monitoring	Persuasion	Quality Control Analysis	Reading Comprehension	Repairing
Requires a Bachelor's Degree or Higher																				
General and Operations Managers		●		●	●						●		●					●		
Pharmacists	●	●			●			●					●					●	●	●
Sales Managers				●	●				●		●		●				●			
Loan Officers	●	●	●		●				●			●						●		
Accountants and Auditors ⁴¹	●	●			●				●			●	●					●		
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Heavy and Tractor-Trailer Truck Drivers		●	●		●	●							●		●	●		●		
First-Line Supervisors of Production and Operating Workers		●		●	●						●		●					●	●	●
Computer, Automated Teller, and Office Machine Repairers	●	●			●								●		●	●		●	●	
Hairdressers, Hairstylists, and Cosmetologists	●	●			●			●		●			●				●		●	●
Heating, Air Conditioning, and Refrigeration Mechanics and Installers ⁴²		●		●	●	●	●										●	●	●	
Cashiers		●		●	●								●					●		●
Retail Salespersons		●			●								●	●			●	●	●	●
Stock Clerks and Order Fillers ⁴³	●	●	●	●	●								●				●		●	●
First-Line Supervisors of Retail Sales Workers					●			●			●		●	●			●	●		●
Combined Food Preparation and Serving Workers, Including Fast Food		●		●	●			●		●							●	●		●

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

⁴¹ Skills represent Accountants, a specialty occupation of Accountants and Auditors.

⁴² Skills represent Heating and Air Conditioning Mechanics and Installers, a specialty occupation of Heating, Air Conditioning, and Refrigeration Mechanics Installers.

⁴³ Skills represent Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Work Activities in the Retail Cluster

The table below lists the 10 top work activities required for top occupations in the Retail cluster, categorized by entry-level education requirements. The most common include establishing and maintaining interpersonal relationships; organizing, planning, and prioritizing work; communicating with supervisors, peers, or subordinates; and making decisions and solving problems.

Occupations	Work Activities																			
	Analyzing Data or Information	Assisting and Caring for Others	Coaching and Developing Others	Communicating with Persons Outside Organization	Communicating with Supervisors, Peers, or Subordinates	Controlling Machines and Processes	Coordinating the Work and Activities of Others	Establishing and Maintaining Interpersonal Relationships	Evaluating Information to Determine Compliance with Standards	Getting Information	Guiding, Directing, and Motivating Subordinates	Handling and Moving Objects	Identifying Objects, Actions, and Events	Inspecting Equipment, Structures, or Material	Interacting With Computers	Making Decisions and Solving Problems	Monitor Processes, Materials, or Surroundings	Monitoring and Controlling Resources	Operating Vehicles, Mechanized Devices, or Equipment	Organizing, Planning, and Prioritizing Work
Requires a Bachelor's Degree or Higher																				
General and Operations Managers																				
Pharmacists																				
Sales Managers																				
Loan Officers																				
Accountants and Auditors ⁴⁴																				
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree																				
Heavy and Tractor-Trailer Truck Drivers																				
First-Line Supervisors of Production and Operating Workers																				
Computer, Automated Teller, and Office Machine Repairers																				
Hairdressers, Hairstylists, and Cosmetologists																				
Heating, Air Conditioning, and Refrigeration Mechanics and Installers ⁴⁵																				
Requires a High School Diploma or Equivalent or Less																				
Cashiers																				
Retail Salespersons																				
Stock Clerks and Order Fillers ⁴⁶																				
First-Line Supervisors of Retail Sales Workers																				
Combined Food Preparation and Serving Workers, Including Fast Food																				

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

⁴⁴ Work Activities represent Accountants, a specialty occupation of Accountants and Auditors.

⁴⁵ Work Activities represent Heating and Air Conditioning Mechanics and Installers, a specialty occupation of Heating, Air Conditioning, and Refrigeration Mechanics Installers.

⁴⁶ Work Activities represent Stock Clerks, Sales Floor, a specialty occupation of Stock Clerks and Order Fillers.

Related Occupations for the Retail Cluster

The table below lists top occupations in the Retail cluster by entry-level education requirements and provides a sample of related occupations. These related occupations match many of the skills, education, and work experience needed for the top Retail cluster occupations.

Retail Occupations	Related Occupations
Requires a Bachelor's Degree or Higher	
General and Operations Managers	<ul style="list-style-type: none"> Purchasing Managers Logistics Managers Lodging Managers
Pharmacists	<ul style="list-style-type: none"> Health Specialties Teachers, Postsecondary Nursing Instructors and Teachers, Postsecondary Medical Scientists, Except Epidemiologists
Sales Managers	<ul style="list-style-type: none"> Financial Managers, Branch or Department Advertising and Promotions Managers Public Relations and Fundraising Managers
Loan Officers	<ul style="list-style-type: none"> Insurance Sales Agents Sales Agents, Financial Services Customs Brokers
Accountants and Auditors	<ul style="list-style-type: none"> Financial Analysts Personal Financial Advisors Risk Management Specialists
Requires Some College, Postsecondary Non-Degree Award, or Associate's Degree	
Heavy and Tractor-Trailer Truck Drivers	<ul style="list-style-type: none"> Light Truck or Delivery Services Drivers Pile-Driver Operators Paving, Surfacing, and Tamping Equipment Operators
First-Line Supervisors of Production and Operating Workers	<ul style="list-style-type: none"> First-Line Supervisors of Construction Trades and Extraction Workers First-Line Supervisors of Mechanics, Installers, and Repairers Non-Destructive Testing Specialists
Computer, Automated Teller, and Office Machine Repairers	<ul style="list-style-type: none"> Computer User Support Specialists Audio and Video Equipment Technicians Electronic Home Entertainment Equipment Installers and Repairers
Hairdressers, Hairstylists, and Cosmetologists	<ul style="list-style-type: none"> Skincare Specialists Dental Assistants Massage Therapists
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	<ul style="list-style-type: none"> Electricians Plumbers Maintenance and Repair Workers, General
Requires a High School Diploma or Equivalent or Less	
Cashiers	<ul style="list-style-type: none"> Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop Counter and Rental Clerks Stock Clerks, Sales Floor
Retail Salespersons	<ul style="list-style-type: none"> Hotel, Motel, and Resort Desk Clerks First-Line Supervisors of Retail Sales Workers Tellers
Stock Clerks and Order Fillers	<ul style="list-style-type: none"> Waiters and Waitresses Dining Room and Cafeteria Attendants and Bartender Helpers Food Servers, Nonrestaurant
First-Line Supervisors of Retail Sales Workers	<ul style="list-style-type: none"> First-Line Supervisors of Food Preparation and Serving Workers Bartenders Wholesale and Retail Buyers, Except Farm Products
Combined Food Preparation and Serving Workers, Including Fast Food	<ul style="list-style-type: none"> Cooks, Fast Food Counter Attendants, Cafeteria, Food Concession, and Coffee Shop Amusement and Recreation Attendants

Source: U.S. Department of Labor's [Occupational Information Network \(O*NET\)](http://www.onetonline.org) at www.onetonline.org.

Employer Demand for the Retail Cluster

The following table lists the San Joaquin Valley Economic Sub-Market** employers in the Retail cluster who posted the most job advertisements during the 120-day period ending April 15, 2015. The table also includes the number of job advertisements from the previous year's period, as well as the numerical change and year-over percent change in these postings for the same 120-day period.

Retail Cluster Employers	Recent Job Advertisements ⁴⁷ (120-day period)	Prior Year Job Advertisements (120-day period)	Numerical Change	Year-Over Percent Change (HWOL Job Advertisements)
Lowe's	149	141	8	5.7%
Macy's	134	56	78	139.3%
Home Depot	126	39	87	223.1%
Target Corporation	101	22	79	359.1%
Sears Holdings Corporation	87	242	-155	-64.0%
Dollar Tree Stores, Inc.	76	14	62	442.9%
Walmart	63	24	39	162.5%
Safeway Companies	49	2	47	2,350.0%
Love's Travel Stops	42	6	36	600.0%
Rite Aid	41	35	6	17.1%
Office Depot	40	14	26	185.7%
Lithia Motors, Inc.	37	3	34	1,133.3%
Toys"R"Us	37	59	-22	-37.3%
Car Max	34	21	13	61.9%
The Dollar General	33	87	-54	-62.1%
Dick's Sporting Goods, Inc.	28	40	-12	-30.0%
Harbor Freight Tools	23	3	20	666.7%
Pep Boys	22	8	14	175.0%
Nestle	20	28	-8	-28.6%
WinCo Foods	20	0	20	—

Source: The Conference Board Help Wanted OnLine™ (HWOL) Data Series: Period ending April 15, 2015.

⁴⁷ Totals do not include employers with anonymous job advertisements.

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Instructional Programs for the Top Retail Cluster Occupations

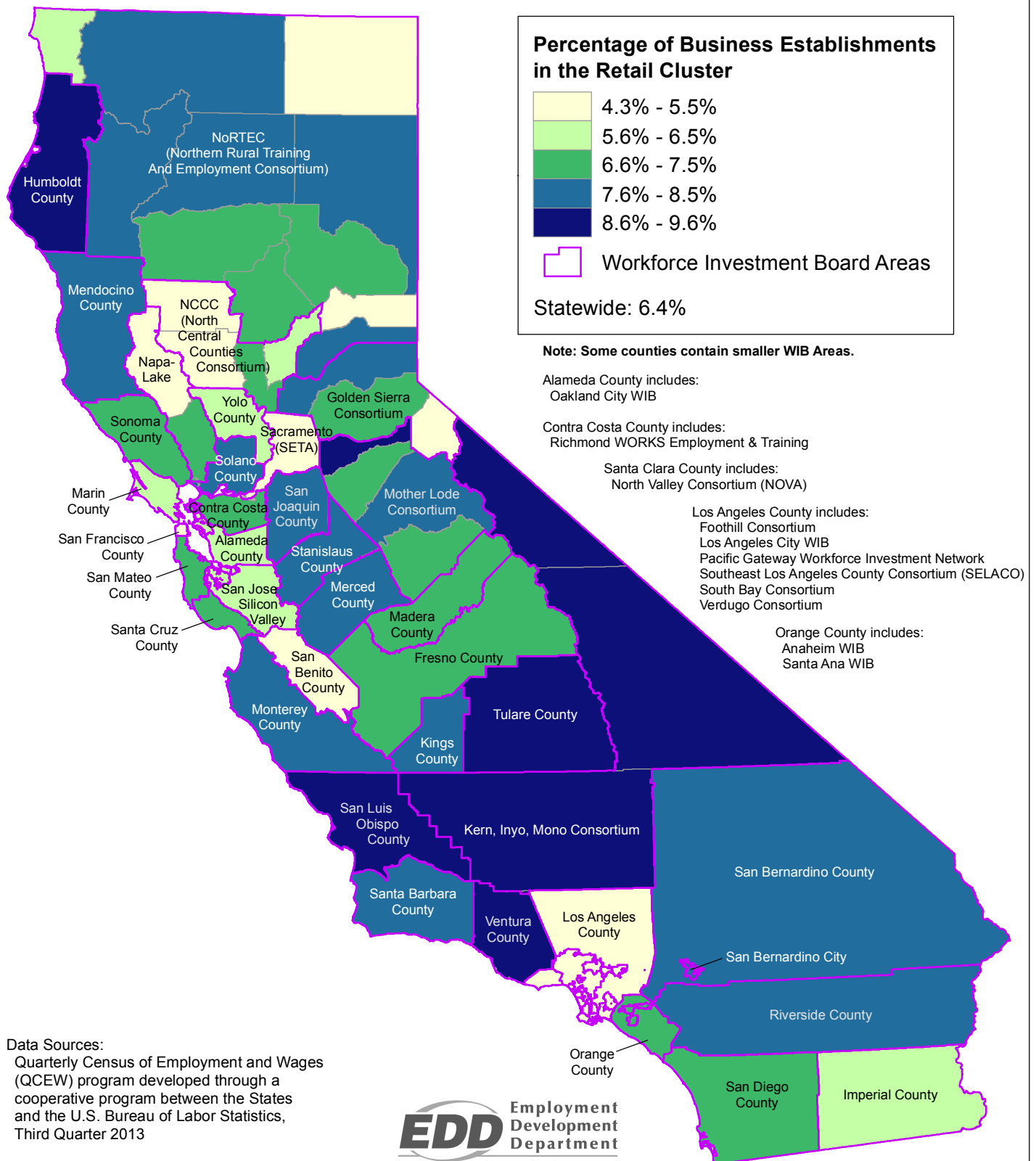
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Occupations	Classification of Instructional Program (CIP)		Taxonomy of Programs (TOP)	
	CIP Code	CIP Title	TOP Code	TOP Title
Heavy and Tractor-Trailer Truck Drivers	49.0205	Truck and Bus Driver/ Commercial Vehicle Operator and Instructor	094750	Truck and Bus Driving
First-Line Supervisors of Production and Operating Workers	52.0205	Operations Management and Supervision	N/A	N/A
Computer, Automated Teller, and Office Machine Repairers	47.0102 47.0104	Business Machine Repair Computer Installation and Repair Technology/Technician	093410	Computer Electronics
Hairdressers, Hairstylists, and Cosmetologists	12.0401	Cosmetology/Cosmetologist, General	300700	Cosmetology and Barbering
	12.0404	Electrolysis/Electrology and Electrolysis Technician		
	12.0406	Make-Up Artist/Specialist		
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	15.0501	Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician	094600	Environmental Control Technology
	47.0201	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician		
First-Line Supervisors of Retail Sales Workers	19.0203	Consumer Merchandising/Retailing	050650	Retail Store Operations and Management
	52.0208	Management E-Commerce/Electronic Commerce	050940	Sales and Salesmanship
	52.0212	Retail Management	050970	E-Commerce (business emphasis)

Source: U.S. Department of Education [Integrated Postsecondary Education Data System \(IPEDS\)](https://nces.ed.gov/ipeds/) at [www.nces.ed.gov](https://nces.ed.gov/); [California Community Colleges TOP-to-CIP Crosswalk](https://www.cccco.edu/) 7th Edition (2010), www.cccco.edu.

California Retail Cluster

Percentage of Total County Establishments, 2013



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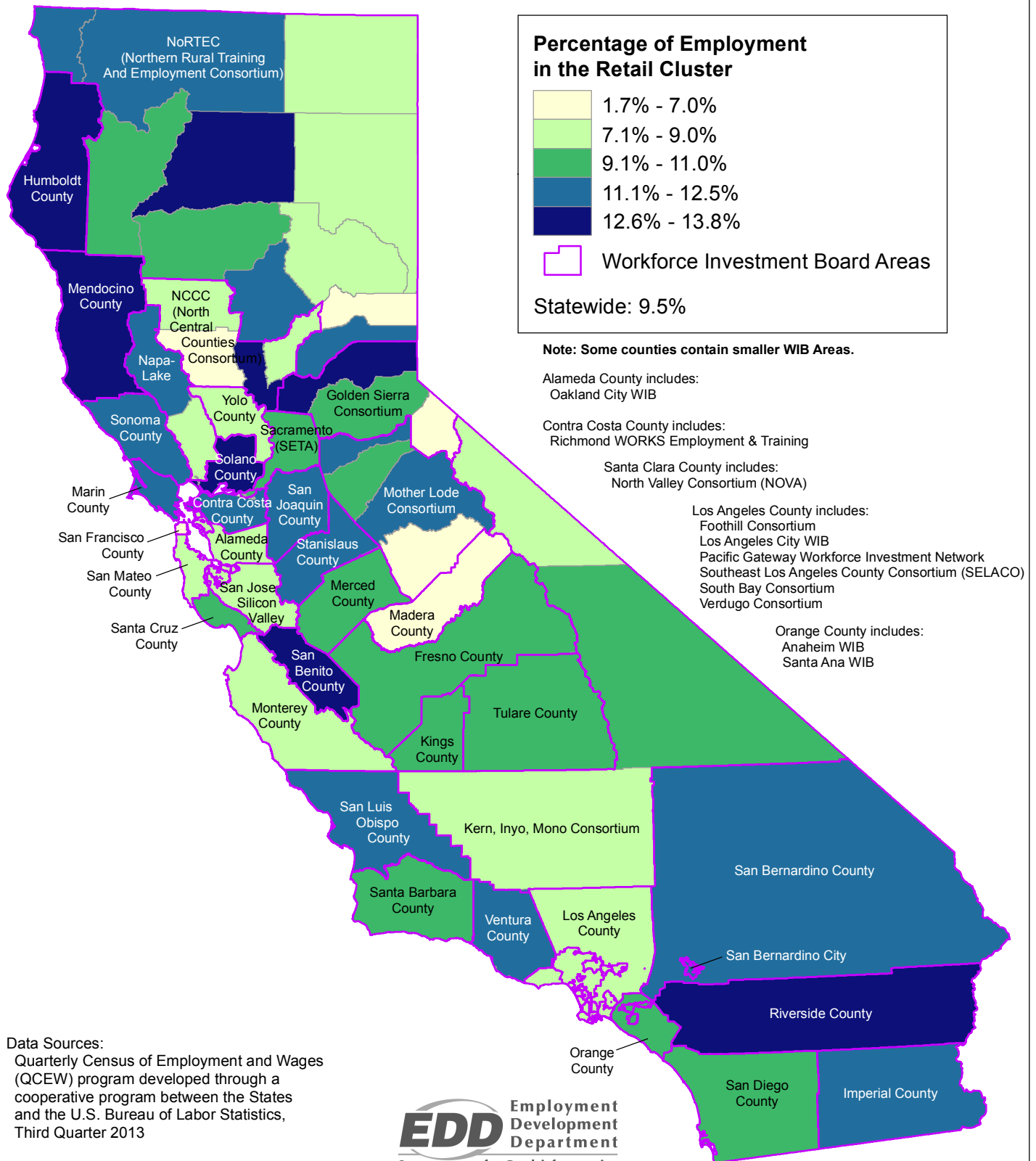
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File T036

California Retail Cluster

Percentage of Total County Employment, 2013



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