



**ECONOMIC &
WORKFORCE
DEVELOPMENT**
through the
CALIFORNIA
COMMUNITY
COLLEGES

**BUSINESS AND WORKFORCE
PERFORMANCE IMPROVEMENT INITIATIVE**



**GIS Employer Report
Los Angeles, Orange, Riverside,
and San Bernardino Counties**

Food Manufacturing



Center of Excellence

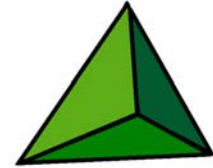
San Bernardino Community College District

June 2007



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GIS Employer Analysis for Centers for International Trade Development (CITD)

Food Manufacturing

June 2007

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THE BUSINESS AND WORKFORCE PERFORMANCE IMPROVEMENT INITIATIVE IS FUNDED IN PART BY THE CHANCELLOR'S OFFICE, CALIFORNIA COMMUNITY COLLEGES, ECONOMIC AND WORKFORCE DEVELOPMENT PROGRAM. THE TOTAL GRANT AMOUNT (GRANT NUMBER 06-305-013 FOR \$205,000) REPRESENTS COMPENSATION FOR MULTIPLE DOCUMENTS OR WRITTEN REPORTS THROUGH THE CENTERS OF EXCELLENCE.

OUR MISSION IS TO STRENGTHEN CALIFORNIA'S WORKFORCE AND ADVANCE ECONOMIC GROWTH THROUGH EDUCATION, TRAINING AND JOB DEVELOPMENT.

FOOD MANUFACTURING EMPLOYERS REPRESENTS 8.36% OF CALIFORNIA'S MANUFACTURING INDUSTRY. 2,408 EMPLOYERS (46.05% OF THE STATES' TOTAL) ARE LOCATED IN LOS ANGELES, ORANGE, RIVERSIDE AND SAN BERNARDINO COUNTIES.

– Source: InfoUSA data

Scope of Report

This GIS Employer Analysis provides an overview of the Food Manufacturing composition and distribution within California as defined by the North American Industry Classification System (NAICS) 311. The statistics and employer counts herein include the following industry sub-sectors:

311111	Dog and Cat Food Manufacturing
311119	Other Animal Food Manufacturing
311211	Flour Milling
311212	Rice Milling
311213	Malt Manufacturing
311221	Wet Corn Milling
311222	Soybean Processing
311223	Other Oilseed Processing
311225	Fats and Oils Refining and Blending
311230	Breakfast Cereal Manufacturing
311311	Sugarcane Mills
311312	Cane Sugar Refining
311313	Beet Sugar Manufacturing
311320	Chocolate and Confectionery Manufacturing from Cacao Beans
311330	Confectionery Manufacturing from Purchased Chocolate
311340	Non-chocolate Confectionery Manufacturing
311411	Frozen Fruit, Juice, and Vegetable Manufacturing
311412	Frozen Specialty Food Manufacturing
311421	Fruit and Vegetable Canning
311422	Specialty Canning
311423	Dried and Dehydrated Food Manufacturing
311511	Fluid Milk Manufacturing
311512	Creamery Butter Manufacturing
311513	Cheese Manufacturing
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing
311520	Ice Cream and Frozen Dessert Manufacturing
311611	Animal (except Poultry) Slaughtering
311612	Meat Processed from Carcasses
311613	Rendering and Meat Byproduct Processing
311615	Poultry Processing
311711	Seafood Canning
311712	Fresh and Frozen Seafood Processing
311811	Retail Bakeries
311812	Commercial Bakeries

311813	Frozen Cakes, Pies, and Other Pastries Manufacturing
311821	Cookie and Cracker Manufacturing
311822	Flour Mixes and Dough Manufacturing from Purchased Flour
311823	Dry Pasta Manufacturing
311830	Tortilla Manufacturing
311911	Roasted Nuts and Peanut Butter Manufacturing
311919	Other Snack Food Manufacturing
311920	Coffee and Tea Manufacturing
311930	Flavoring Syrup and Concentrate Manufacturing
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing
311942	Spice and Extract Manufacturing
311991	Perishable Prepared Food Manufacturing
311999	All Other Miscellaneous Food Manufacturing

The scope of this report covers a four-county area including Los Angeles, Orange, Riverside and San Bernardino Counties unless otherwise cited. All data comes from secondary sources. No primary research (interviews or surveys) was conducted nor was any industry validation performed to compile the data herein.

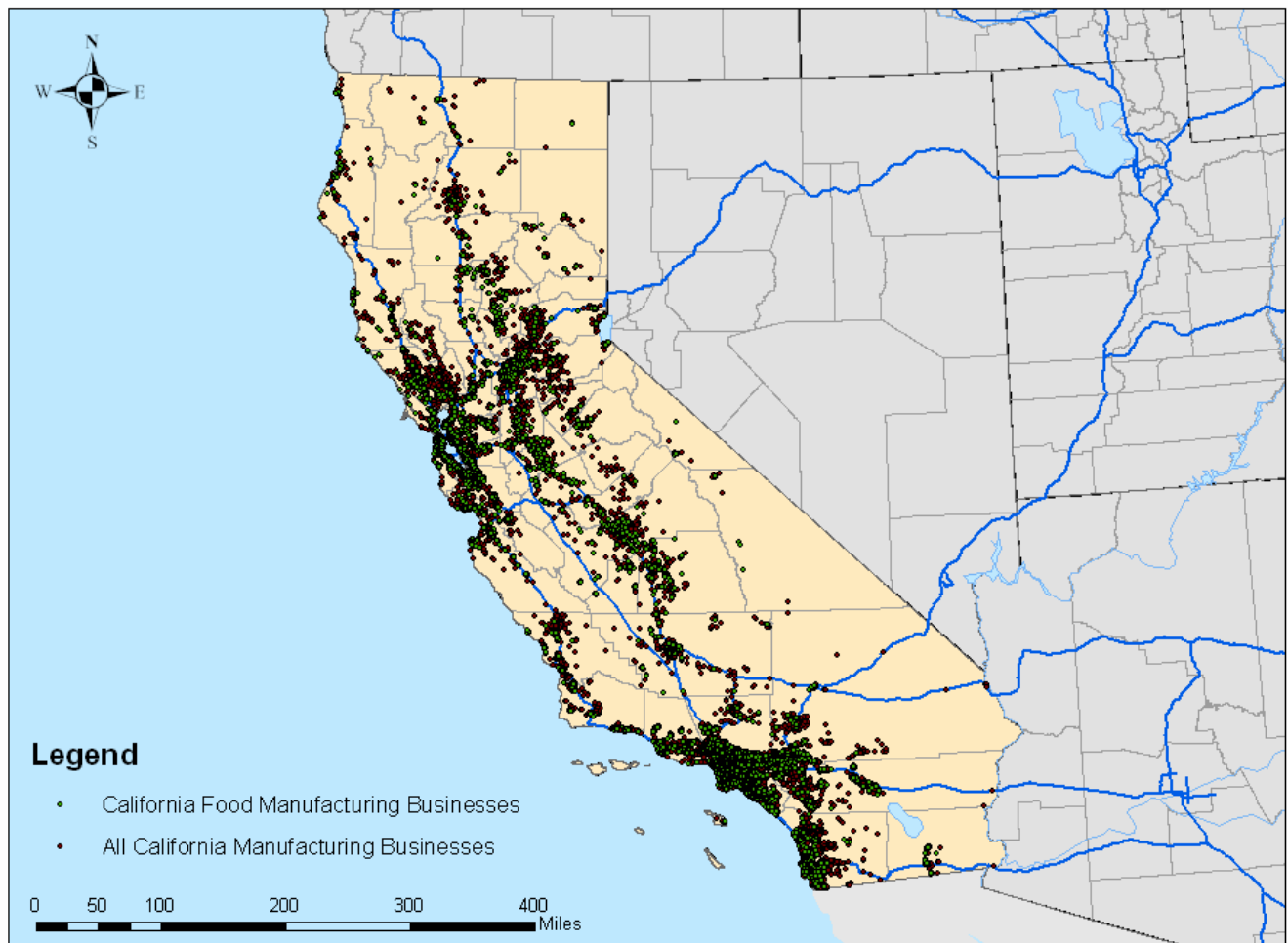
This report was requested of the Centers of Excellence by the Centers for International Trade Development's Agricultural HUBs for the purpose of informing their statewide marketing and promotional efforts.

California Manufacturing Employers

According to InfoUSA data, there were 62,530 manufacturing businesses within the State of California in 2006. These employers included all sub sectors of manufacturing (NAICS 31-33).

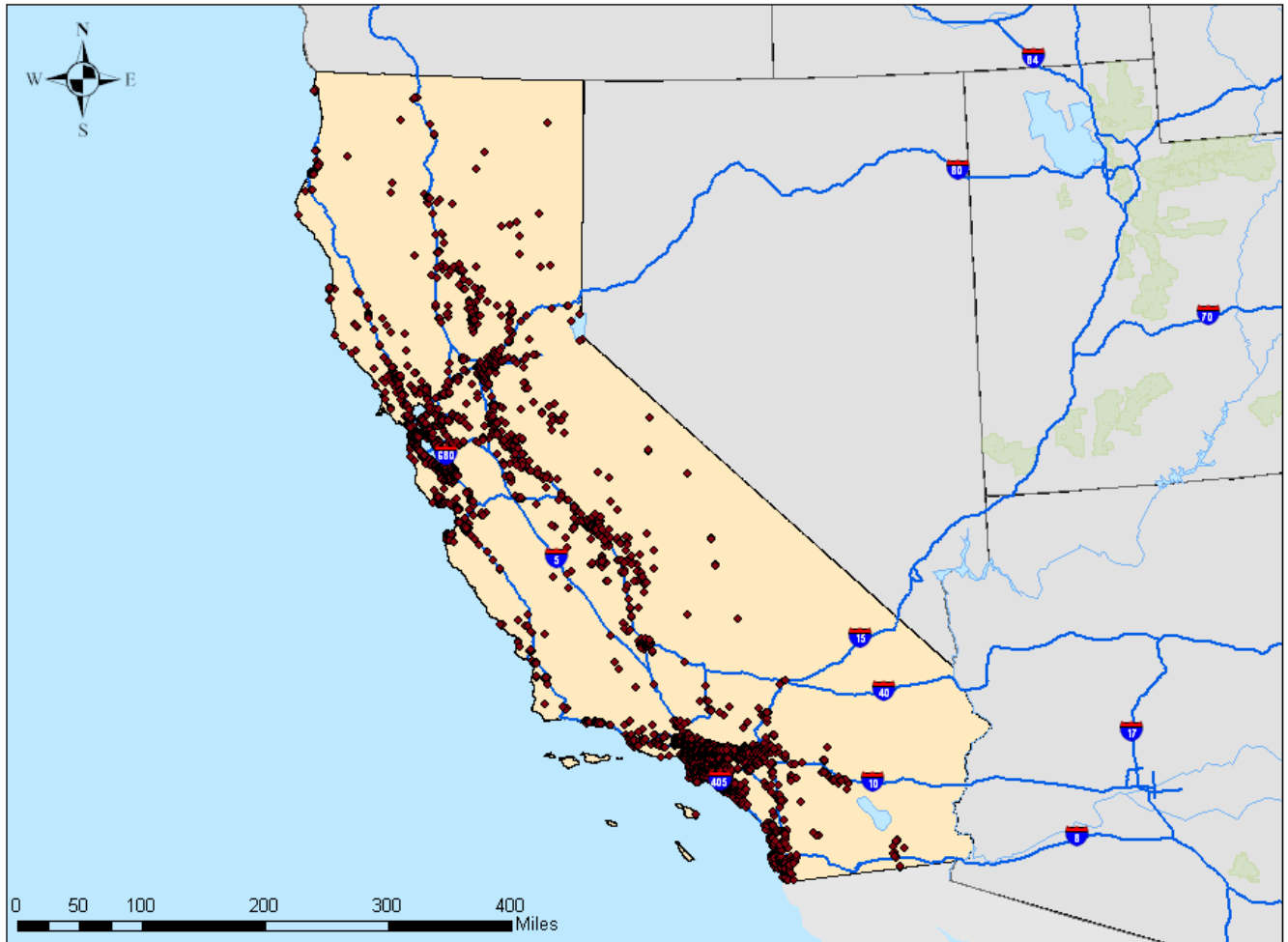
The green dots in the map below illustrate the 5,229 Food Manufacturing employers throughout the state (identified by NAICS 311). These businesses comprise 8.36% of the state's Manufacturing industry.

All 2006 Manufacturing vs. Food Manufacturing Businesses in California



When isolating the Food Manufacturing employers within California, we see concentrations of employers in Los Angeles, San Diego, the Bay area, and along CA State Route 99.

California Food Manufacturing Businesses (NAICS 311) in 2006

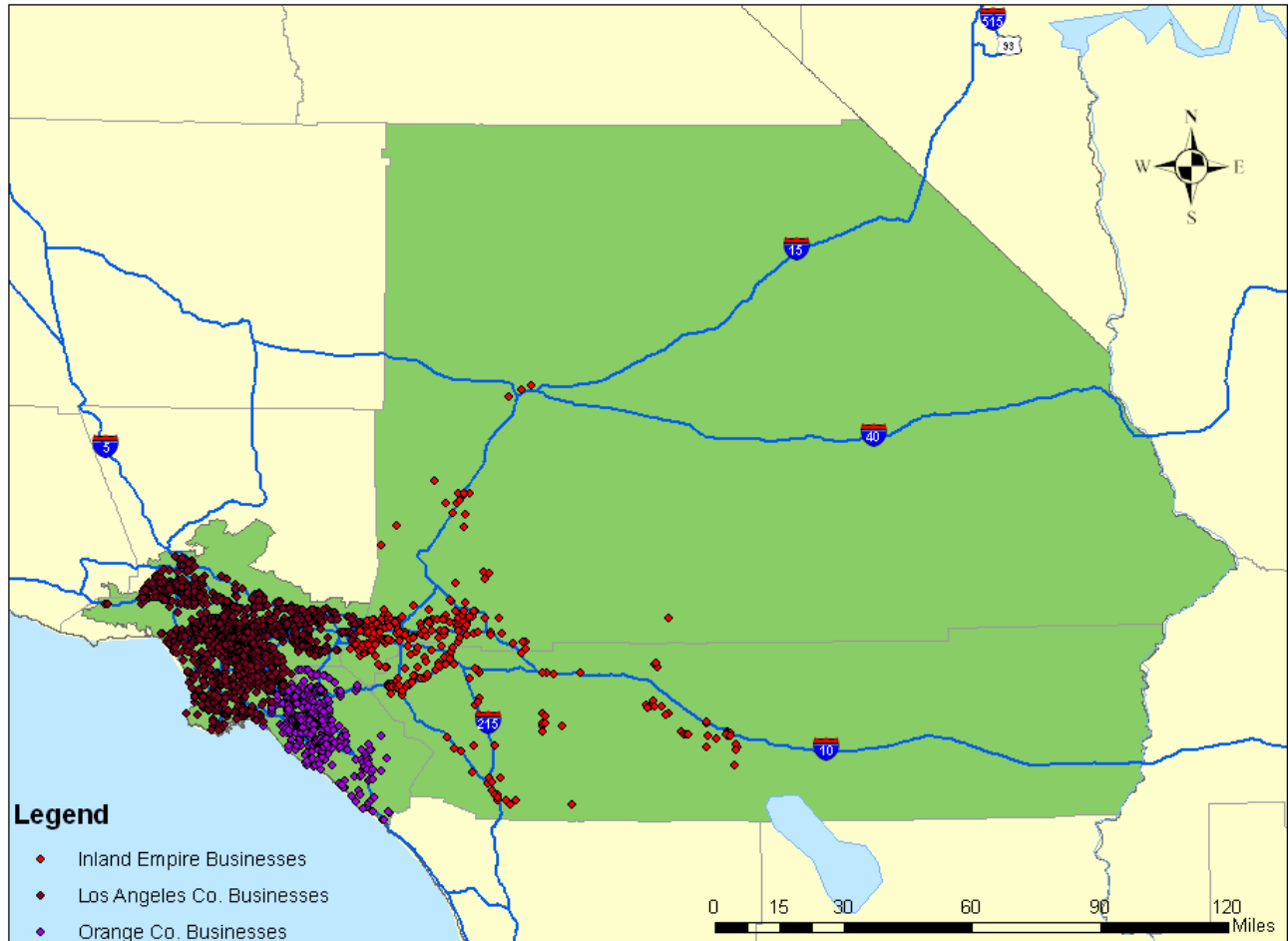


IE/LA/O Food Manufactures

The four-county area including Los Angeles, Orange, Riverside and San Bernardino Counties is home to 2,408 food manufacturing employers – representing 46.05% of the state’s total food manufacturing businesses. The largest concentration of employers within these selected counties is found in Los Angeles County (which is home to 31.8% of the state’s food manufacturers).

<u>Geographical Region</u>	<u>Employers</u>
Inland Empire Food Manufacturing Businesses	319
Los Angeles County Food Manufacturing Businesses	1,667
Orange County Manufacturing Businesses	422
Total	2,408

LA, Orange, & Inland Empire Food Manufacturing Businesses (NAICS 311) in 2006



Distribution among Food Manufactures

The four-county area including Los Angeles, Orange, Riverside and San Bernardino Counties is home to 2,408 food manufacturing employers within 47 different sub-sectors (10 of which are not represented within this region). By far, Retail Bakeries represent the largest share of food manufactures (31.5%) in this four-county area.

The employee counts for each sub-sector are:

No. of Employers	NAICS	Sub-sector
1648	311811	Retail Bakeries
209	311999	All Other Miscellaneous Food Manufacturing
65	311611	Animal (except Poultry) Slaughtering
62	311812	Commercial Bakeries
39	311330	Confectionery Manufacturing from Purchased Chocolate
34	311823	Dry Pasta Manufacturing
29	311421	Fruit and Vegetable Canning
27	311520	Ice Cream and Frozen Dessert Manufacturing
27	311612	Meat Processed from Carcasses
25	311942	Spice and Extract Manufacturing
21	311712	Fresh and Frozen Seafood Processing
21	311920	Coffee and Tea Manufacturing
18	311211	Flour Milling
15	311225	Fats and Oils Refining and Blending
15	311412	Frozen Specialty Food Manufacturing
15	311919	Other Snack Food Manufacturing
15	311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing
13	311821	Cookie and Cracker Manufacturing
12	311119	Other Animal Food Manufacturing
11	311320	Chocolate and Confectionery Manufacturing from Cacao Beans
11	311613	Rendering and Meat Byproduct Processing
10	311411	Frozen Fruit, Juice, and Vegetable Manufacturing
9	311111	Dog and Cat Food Manufacturing
8	311711	Seafood Canning
7	311513	Cheese Manufacturing
7	311615	Poultry Processing
7	311930	Flavoring Syrup and Concentrate Manufacturing
5	311511	Fluid Milk Manufacturing
4	311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing
4	311813	Frozen Cakes, Pies, and Other Pastries Manufacturing
3	311423	Dried and Dehydrated Food Manufacturing
3	311991	Perishable Prepared Food Manufacturing
2	311311	Sugarcane Mills
2	311422	Specialty Canning

2	311512	Creamery Butter Manufacturing
1	311822	Flour Mixes and Dough Manufacturing from Purchased Flour
1	311911	Roasted Nuts and Peanut Butter Manufacturing
0	311212	Rice Milling
0	311213	Malt Manufacturing
0	311221	Wet Corn Milling
0	311222	Soybean Processing
0	311223	Other Oilseed Processing
0	311230	Breakfast Cereal Manufacturing
0	311312	Cane Sugar Refining
0	311313	Beet Sugar Manufacturing
0	311340	Non-chocolate Confectionery Manufacturing
0	311830	Tortilla Manufacturing

Employer Analysis

An Excel Spreadsheet with available employer data (for the 2,408 regional employers) was sent electronically under separate cover. This database included:

- Name
- NAICS code (3,6 and 8 digit level)
- SIC Code
- 2005 Sales figures
- Number of Employees
- Address, City , State and Zip

While this data (purchased through InfoUSA) is very reliable and validated annually, employer data is all self-reported by the individual companies and there are some duplicates if the company has a secondary corporation, multiple locations, etc. This data is current as of July 2006.

APPENDIX A: How to Utilize this Report

About Us - Description of BWPI

The Business and Workforce Performance Improvement (BWPI) initiative is focused on building the capacity of the colleges in the area of economic and workforce development to enhance their ability to deliver education and training services to businesses and workers in high growth industries, new technologies, and other clusters of opportunities.

The Centers of Excellence (COE) within BWPI provide information regarding workforce trends, increasing awareness and visibility about the colleges economic and workforce development programs and services, and building partnerships with business and industry.

The difference this will make to the colleges is that it will position them as THE workforce partners of choice to business and industry and ensure that college programs are current and responsive. This will contribute to the overall economic vitality of the communities in which they serve.

How to Use This Local Analysis

The Centers of Excellence within the Business and Workforce Performance Improvement Initiative of the California Community College Economic and Workforce Development Network have undertaken Regional and College-Specific analyses to provide targeted and valuable information to community colleges on high growth industries and occupations.

This report is intended to assist the decision-making process of California Community College administrators and planners in addressing local and regional workforce needs and emerging job opportunities in the workplace as they relate to college programs. The information contained in this report can be used to guide program offerings, strengthen grant applications, and support other economic and workforce development efforts.

This report is designed to provide current industry data that will:

- Define potential strategic opportunities relative to an industry's emerging trends and workforce needs;
- Inform strategic marketing, promotion, and partnership efforts
- Influence and inform local college program planning and resource development; and
- Promote a future-oriented and market responsive way of thinking among stakeholders.

Important Disclaimer:

All representations included in this regional product/study have been produced from a secondary review of publicly and/or privately available data and/or research reports. Efforts have been made to qualify and validate the accuracy of the data and the reported findings. The purpose of this Report is to assist the California Community Colleges to respond to emerging market needs for workforce performance improvement. However, neither the Business and Workforce Performance Improvement Centers of Excellence, COE host college/district nor the California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges or their representatives based upon this study including components or recommendations.