



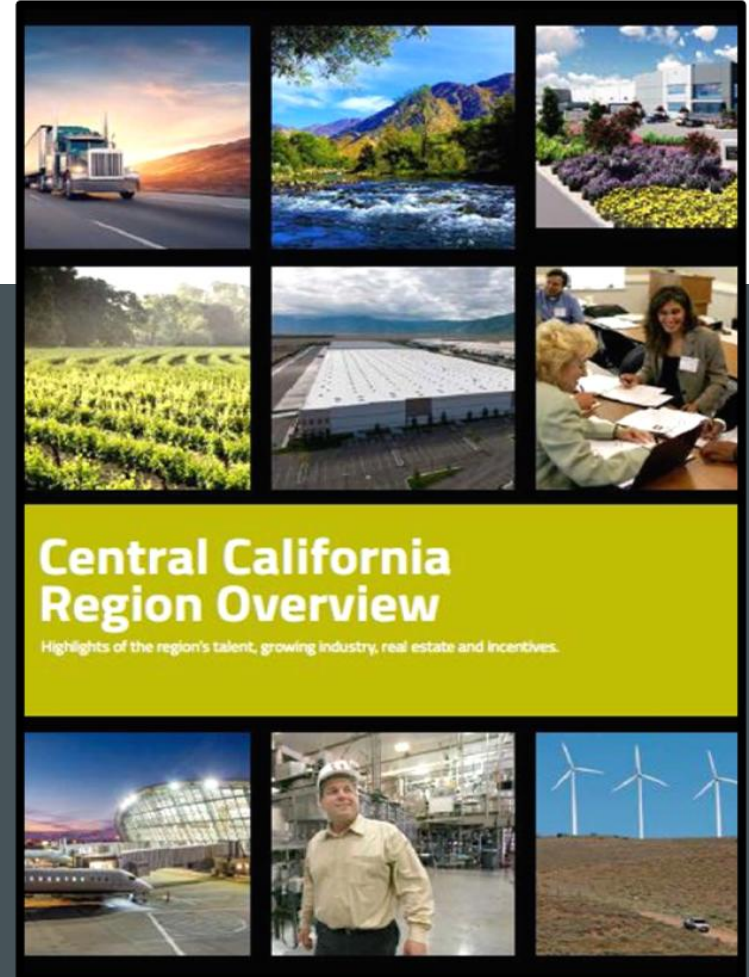
CENTRAL CALIFORNIA MARKET UPDATE

3RD QUARTER 2025

California Central Valley EDC
Jennifer Faughn
jfaughn@centralcalifornia.org
www.centralcalifornia.org

Where Industry Meets Opportunity

COUNTIES OF: KERN, TULARE, KINGS, FRESNO, MADERA AND MERCED

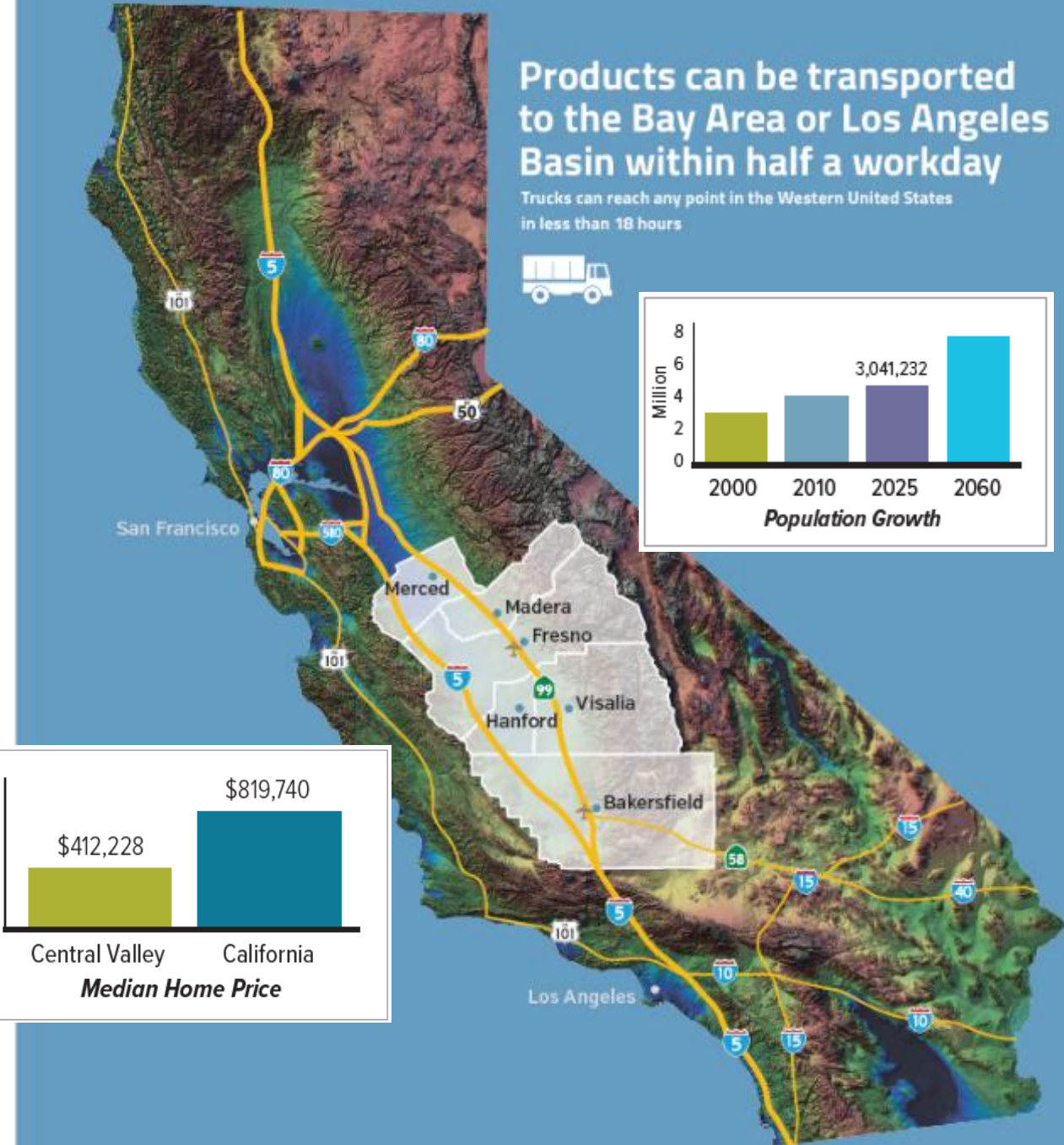
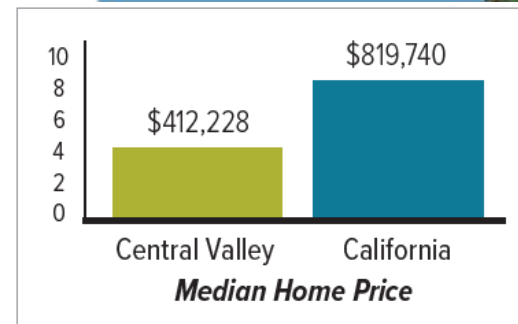
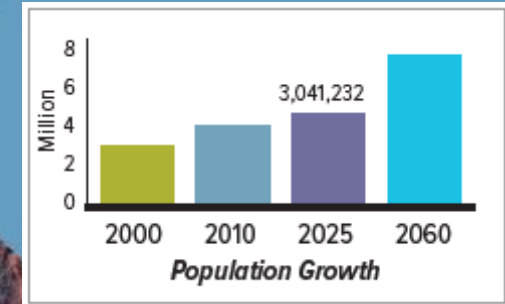


CENTRAL CALIFORNIA

- One Region...One Contact
- Home to 3 million people
- Center of 4th largest World Economy (40 million people)
- Dual Rail Lines and Traffic Corridors
- 4 Deep Water Ports nearby
- 3 Metro Passenger Airports
- 4 Public Universities, 14 Community Colleges/Focus on CTE
- Central Valley's percentage growth (32%) continues to outpace the state (17%), nearly double the states percentage since 2000.
- Lower Cost Region 30-50%
- UNEMPLOYMENT Annual Average
8.3% Central CA, 5.3% State CA

Products can be transported to the Bay Area or Los Angeles Basin within half a workday

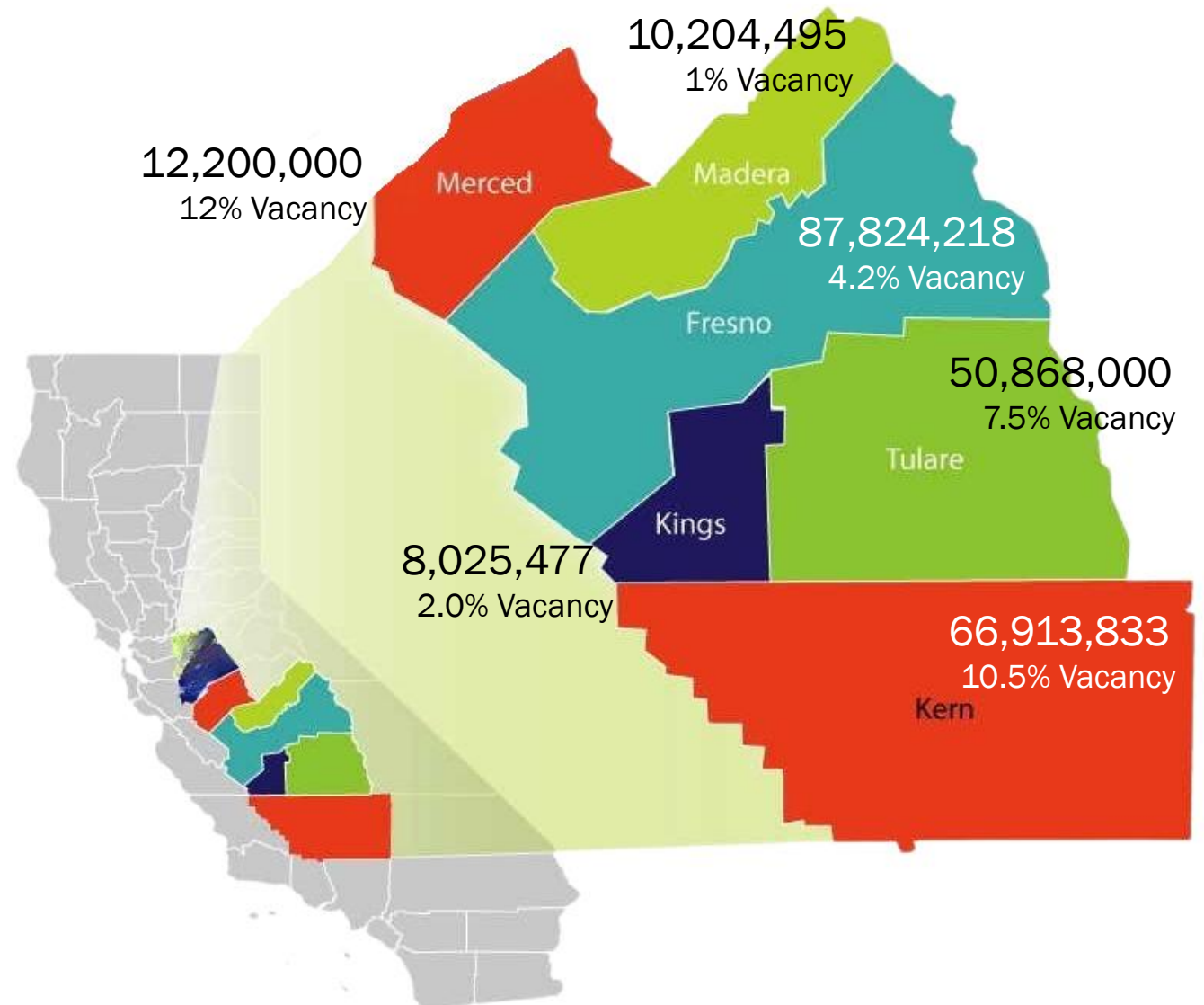
Trucks can reach any point in the Western United States in less than 18 hours





INDUSTRIAL MARKET INDICATORS

- 236 M TOTAL SF
- \$0.71 Ave NNN Asking (Range .58-.81)
- 6.2 % Vacancy Rate
- San Joaquin Valley has added 70 M sf in the past 5 years
- Counties now converting/adding industrial Land



KERN COUNTY

Melinda Brown, Vice President,
Kern Economic Development

Kern County's Cities

Arvin, Bakersfield, California
City, Delano, Maricopa,
McFarland, Ridgecrest,
Shafter, Taft, Tehachapi,
Wasco

• Bakersfield

Kern County

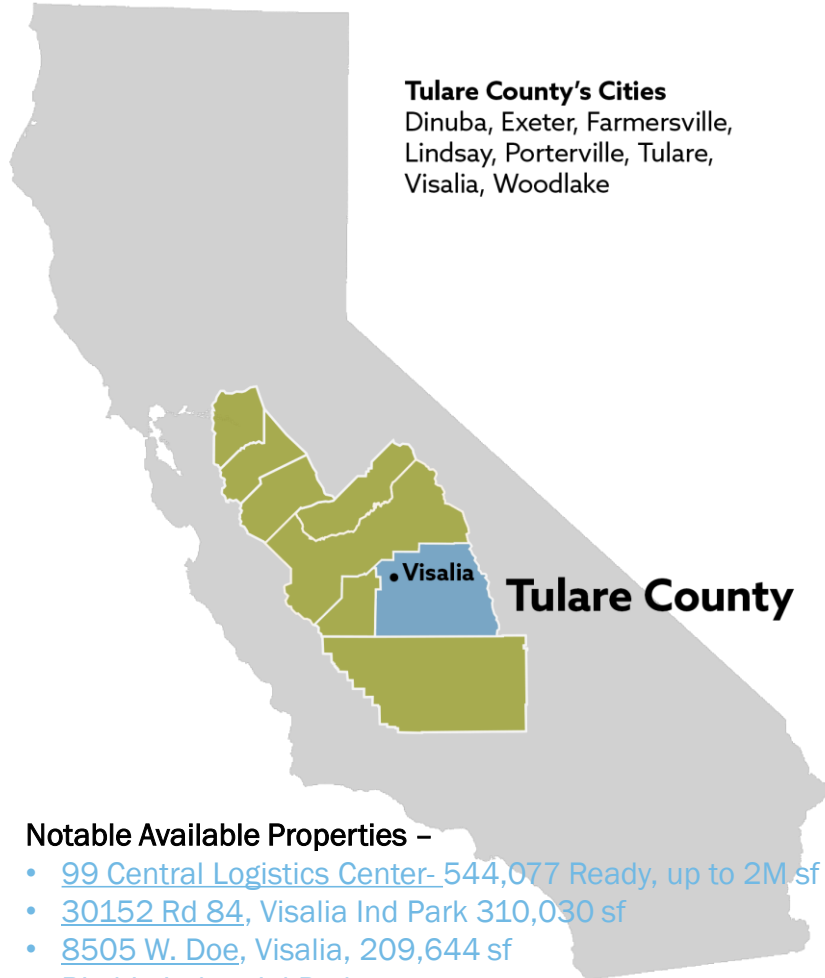
Notable Available Properties –

- [1700 Schuster Rd, Delano, CA](#) 1,213,366 sf with Rail
- [58 Logistics Center, Bakersfield, CA](#) BTS up to 2,251,000
- [5104 Express Ave, Shafter, CA](#) 1,088,047 sf
- [34598 7th Standard, Bakersfield, CA](#) 175,875 sf on 132 Ac



TULARE COUNTY

Shawna Bryant, Tulare County EDC



Notable Available Properties –

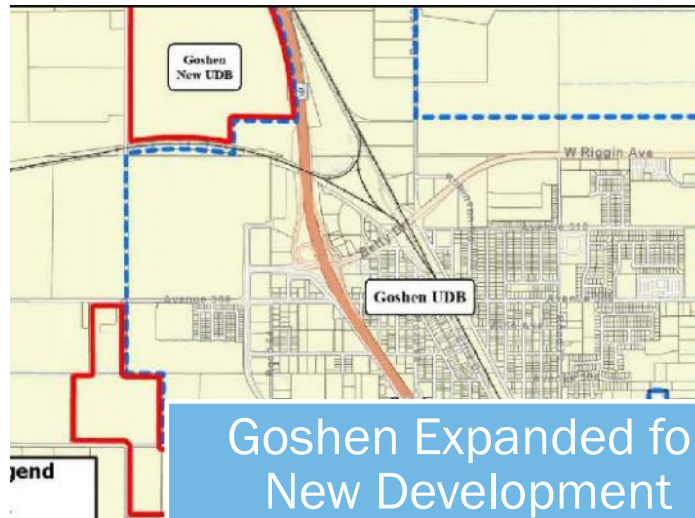
- [99 Central Logistics Center](#)- 544,077 Ready, up to 2M.sf
- [30152 Rd 84](#), Visalia Ind Park 310,030 sf
- [8505 W. Doe](#), Visalia, 209,644 sf
- [Ritchie Industrial Park](#)
- [2918 Pratt St.](#), Tulare, CA 250,000 to 1M sf Spec



Cap Rock- New Spec
4001 N Plaza Dr. Visalia
1,201,726 sf



99 Central Logistics
Center, Tulare- New Spec
544,077 sf



Goshen Expanded for
New Development
718 Acres Converted

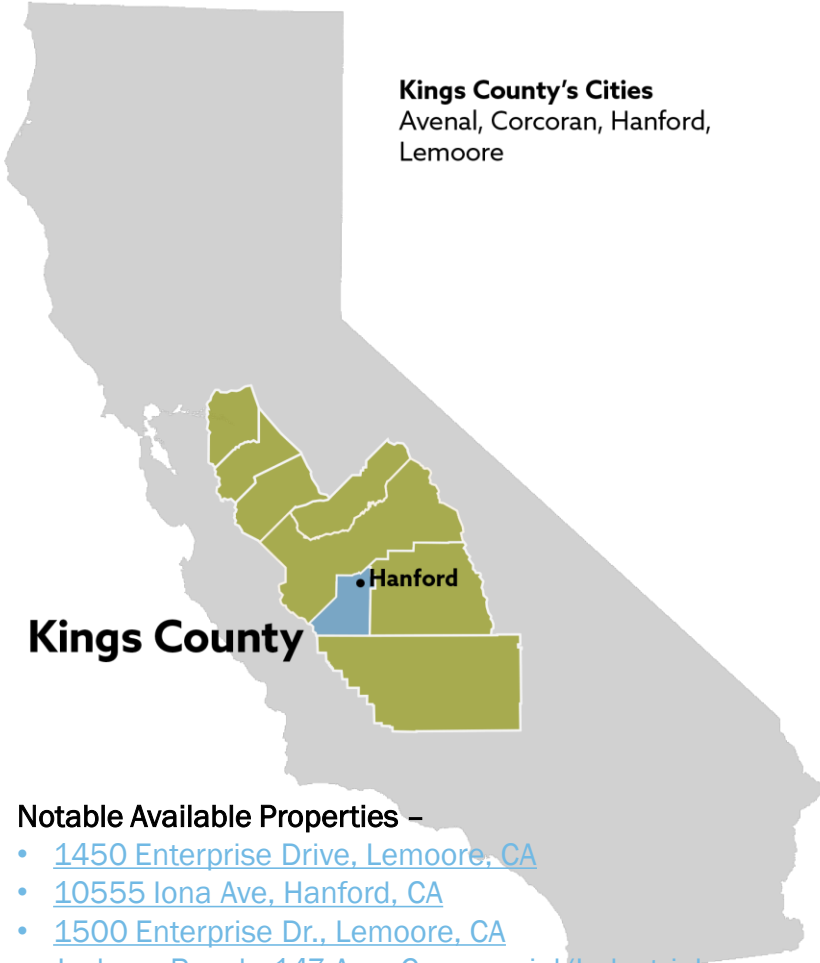


\$52 million Highway 99
new interchange (near
International Agri-Center)

KINGS COUNTY

Fabio Ianni, Economic Development
Manager, Kings County EDC

Kings County's Cities
Avenal, Corcoran, Hanford,
Lemoore



Kings County

Notable Available Properties –

- [1450 Enterprise Drive, Lemoore, CA](#)
- [10555 Iona Ave, Hanford, CA](#)
- [1500 Enterprise Dr., Lemoore, CA](#)
- [Jackson Ranch- 147 Acre Commercial/Industrial](#)
- [Hanford Industrial Land- 15.62 Ac](#)
- [10652 Jackson, Hanford, CA](#)



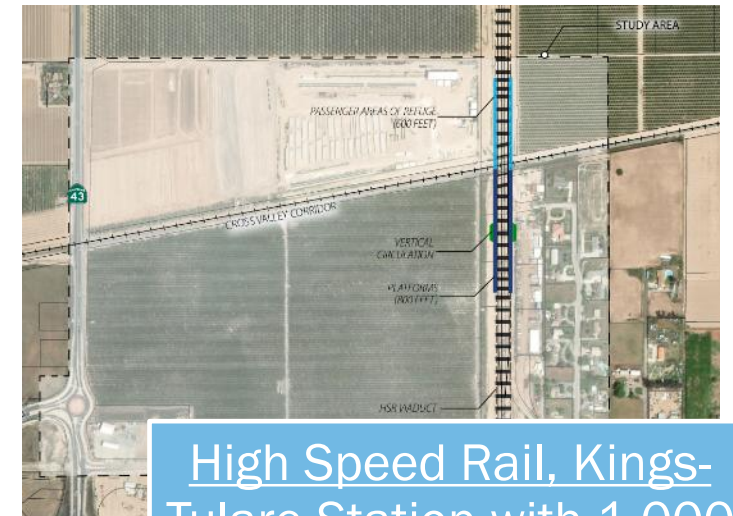
Jackson Ranch, I-5
147 Ac



Former Del Monte Facility
1,319,937 sf, 125 Ac



Marquez Brothers –
Cheese production new
plant expansion



High Speed Rail, Kings-
Tulare Station with 1,000
Ac. Industrial/Commercial

FRESNO COUNTY

Will Oliver, CEO, Fresno County EDC



Fresno County's Cities

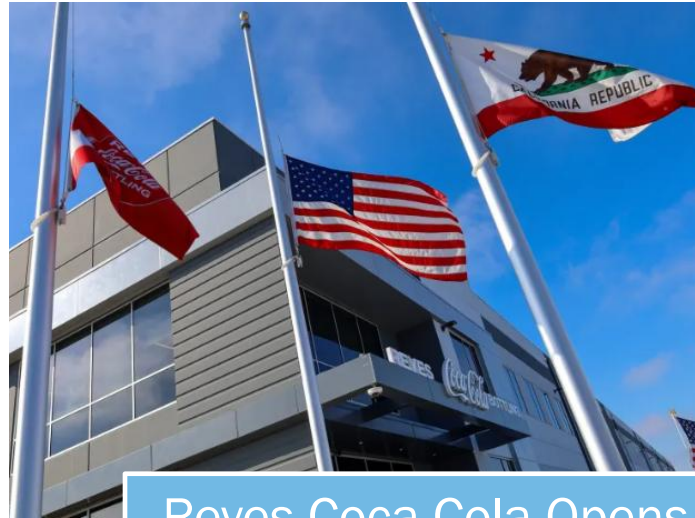
Clovis, Coalinga, Firebaugh,
Fowler, Fresno, Huron,
Kerman, Kingsburg,
Mendota, Orange Cove,
Parlier, Reedley, San Joaquin,
Sanger, Selma

Fresno County

• Fresno

Notable Available Properties –

- [South Fresno Logistics Center - 4723 S. Peach Avenue Fresno, CA - 648,000sf](#)
- [Scannell Business Park - 2740 W. Neilsen Avenue Fresno, CA - approximately 1MM sf, speculative industrial development](#)
- [Fancher Creek Business Park](#)
- [2842 N. Business Park Avenue Fresno, CA](#)
- [Kingsburg Business Park:](#)
- [9225 S. Milton Ave. Parlier, CA - 20,400sf. Office, warehouse, lab space.](#)
- [39400 Clarkson Drive, Kingsburg, CA](#)



Reyes Coca Cola Opens
new 205,000 sf BTS

TEXAS MANUFACTURER EXPANDS INTO FRESNO WITH \$5.3M PURCHASE



Turnkey Industries from TX
buys 41K sf Mfg. facility



Scannell Properties-
broke ground 833,000 sf



First Chapter
in CA

Dive into a Challenging
Advanced Manufacturing Career

MADERA COUNTY

Kristina Gallagher, Executive Director,
Madera County EDC

Madera County's Cities
Chowchilla, Madera



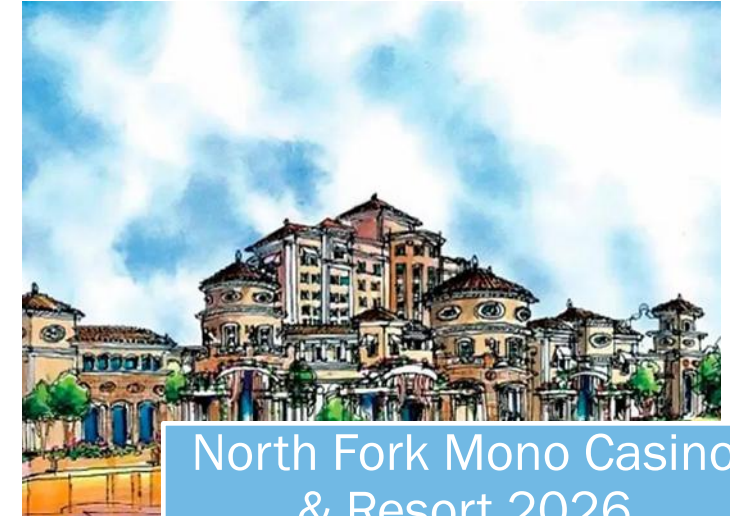
Auto Zone Distribution
Chowchilla 560,000 sf



2901 Falcon Dr. 17,000
sf on 2.4 Ac



Calbee opened R&D
Facility in Madera



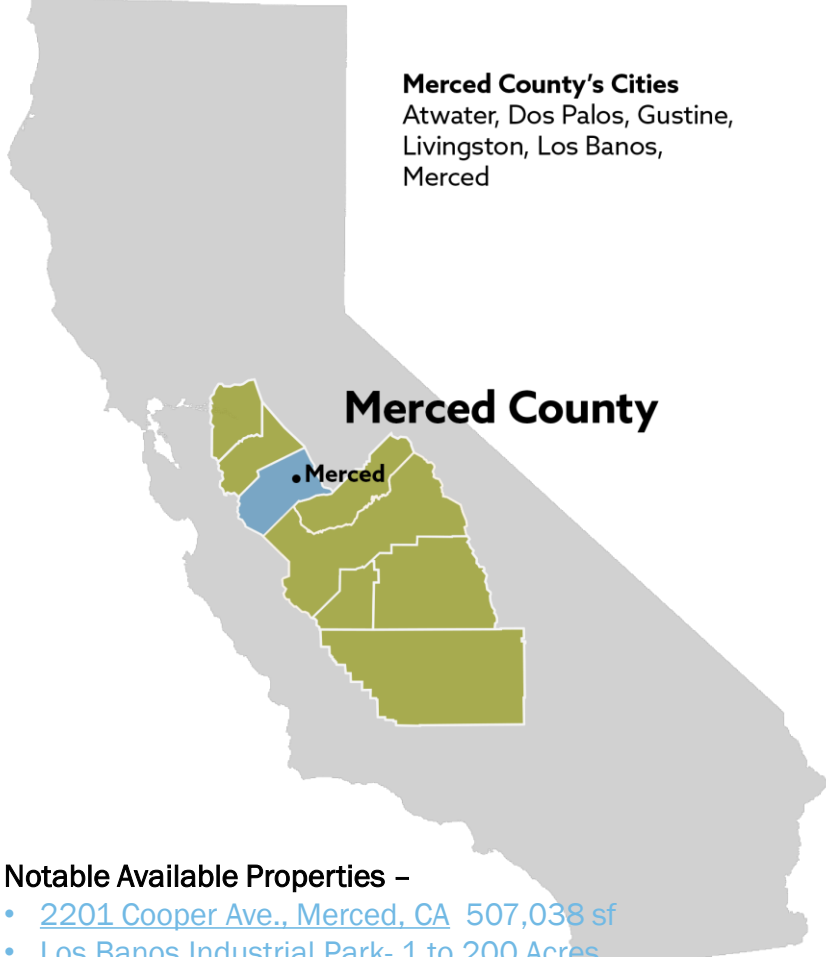
North Fork Mono Casino
& Resort 2026
Completion

Notable Available Properties –

- [1960 Independence Dr, Madera, CA](#) 50,274 sf
- [2901 Falcon Dr, Madera, CA](#) 17,000 sf
- [Freedom Industrial Park Madera, CA](#) 1 to 33 Ac for Dev.

MERCED COUNTY

Tamra Spade, Deputy Director, Economic Development, Merced County



Merced County's Cities
Atwater, Dos Palos, Gustine,
Livingston, Los Banos,
Merced

Notable Available Properties –

- [2201 Cooper Ave., Merced, CA](#) 507,038 sf
- [Los Banos Industrial Park](#)- 1 to 200 Acres
- [2050 Wardrobe Ave, Merced, CA](#) 60,000 sf
- [2901 Apron Ave, Atwater, CA](#) 76,110 sf



2201 Cooper Ave
507,038 sf Heavy
Power/Rail



Invest \$300M in Merced,
bringing 1,000 Jobs



Los Banos Industrial Park
1 to 200 Acres Available



Castle Rail District-
transload and Inland Port

STATE AND LOCAL INCENTIVES



State of California



[California Competes Tax Credit](#)



[California Opportunity Zones](#)



[Employee Training Panel](#)



[Work Opportunity Tax Credit & Fidelity Bonding Program](#)



[R & D Tax Credit](#)



[Manufacturing Partial Sales and Use Tax Exemption](#)



[Sales & Use Tax Exclusion - CAEATFA STE](#)



[Utilities Savings-EDR](#)

Central Valley City and County Incentives

- Workforce Assistance: Screening, Training, CTE, Upskilling
- Incentives are often done on a case-by-case basis based on the needs of the client for a specific site.
- Some communities have Incentive Policies that can be found on our web site: [County Profiles – Central California](#)

CENTRAL CALIFORNIA

WHERE COST COUNTS—AND CAPABILITY LEADS.

The California Central Valley is redefining what it means to be a cost-competitive region—where the value equation extends far beyond the bottom line. Here, affordability meets advanced capability, creating a location where companies don't have to choose between cost savings and long-term performance.

Resilience Diversified industries—agribusiness, logistics, manufacturing, and energy—create a region built to endure and adapt with strong local collaboration.

Talent A skilled workforce trained in robotics, automation, and smart manufacturing through CTE programs and local colleges ensures operational excellence.

Speed to Market Central location with fast access to major ports—Oakland, Stockton, LA/Long Beach—means quicker delivery, lower drayage costs.

Long-Term Viability Ample land, cost stability, and infrastructure investment ensure companies can grow sustainably and scale for decades in California's Central Valley.

Cost Advantage Offers significant savings on land, labor and logistics without sacrificing capability. Friendly cities and streamlined permitting pave the way.