



Retail Market Overview

Prepared by:



May 2020

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REPORT OVERVIEW

This report is intended to highlight a summary of market indicators necessary for retail success within varying trade areas in Coalinga, CA. Demographic statistics, graphs, and map visuals are presented to detail consumer presence throughout the market.

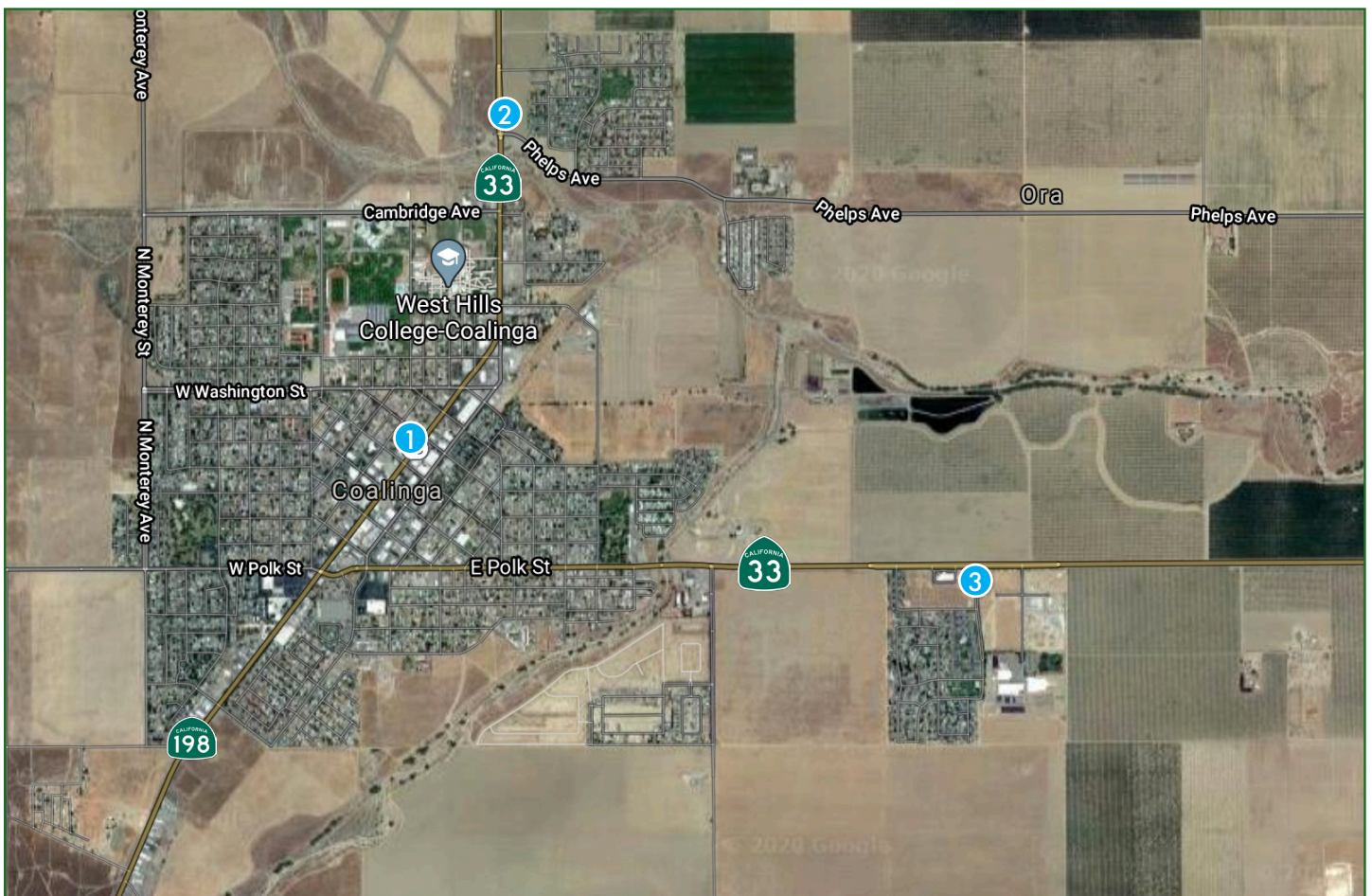
Additionally, providing insight beyond demographics, this report includes figures of psychographic tendencies. Every U.S. household is classified into one of 67 distinct segments. These segments describe the household's lifestyle and spending habits.

At the end of each trade area report is a retail gap analysis. The analysis examines the quantitative aspect of the trade area's retail opportunities.

The trade area maps are centered on the following commercially zoned locations:

1. Elm Ave. & 5th Ave.
2. Elm Ave. & Phelps Ave.
3. Jayne Ave. Parcel

Aerial Map





City Overview



Nestled in the Pleasant Valley, Coalinga is the largest city in western Fresno County and is also known as, "The Sunny Side of the Valley". The city is located 10 miles west of Interstate 5 and 60 miles southwest of Fresno. Coalinga is the retail hub of surrounding towns with a trade area population of over 40,000.

Internationally known oil and gas companies that employ hundreds of workers in the nearby oil fields have allowed residents to prosper and earn higher than average household incomes. Discovered in the late 19th century, it is now the eighth-largest oil field in California.

Coalinga hosts multiple annual events that draw a large number of tourists and contribute to the local community. The largest of these events is the Wham-O-Bass Balloon Rally that occurs each November. The event is the longest consecutively running hot air balloon festival in the world. Over 40 balloons can be seen flying over the city throughout the event weekend. One of Coalinga's longest running traditions is the Annual Horned Toad Derby that began in 1935. The event is held every Memorial Day weekend and includes a carnival, parade, Horned Toad Races and many fun family festivities.

In 2016 the Coalinga City Council was one of the first cities in Fresno County to pass an ordinance allowing for the cultivation, manufacturing and distribution of cannabis. Coalinga is the only city in Fresno County that has licensing and regulatory frameworks for both adult use and medical cannabis.

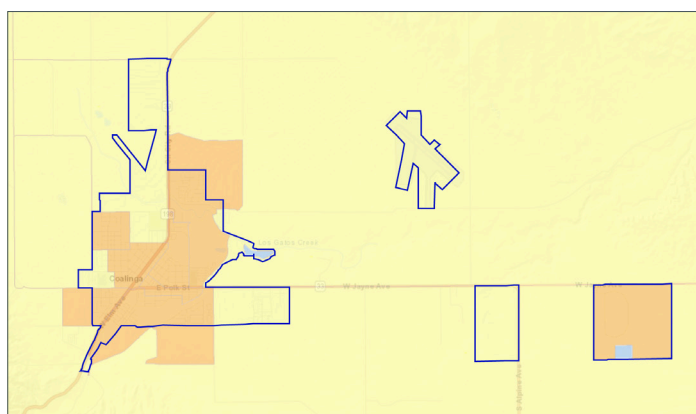
Coalinga is the also home of West Hills College with a student population of 7,207. West Hills College continues to experience significant growth, providing college-level course work in a variety of disciplines. West Hills College also partners with Fresno State University through cooperative programs that allow West Hills students to complete university courses.

CITY DATA - DEMOGRAPHICS & WORKFORCE

	City of Coalinga	Projected Growth by 2024
Population	18,267	2.05%
Median Household Income	\$55,808	\$71,827
Average Age	34.9	35.1
Number of Households	3,967	2.80%
Daytime Population	6,237	3.7%

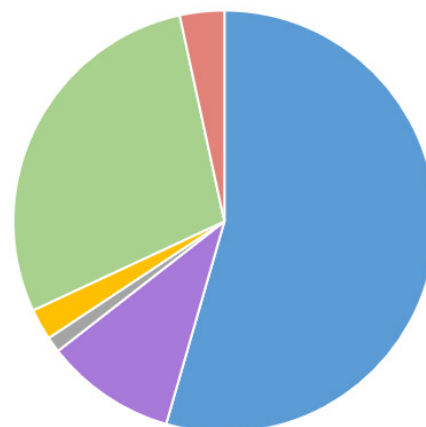
Coalinga Labor Force		
In labor force	5,856	48.5%
Employed	5,464	93.3%
Unemployed	392	6.7%
Not in labor force	6,218	51.5%

Coalinga Population Density



- 0 - 1,229 people per sq mi
- 1,230 - 2,103 people per sq mi

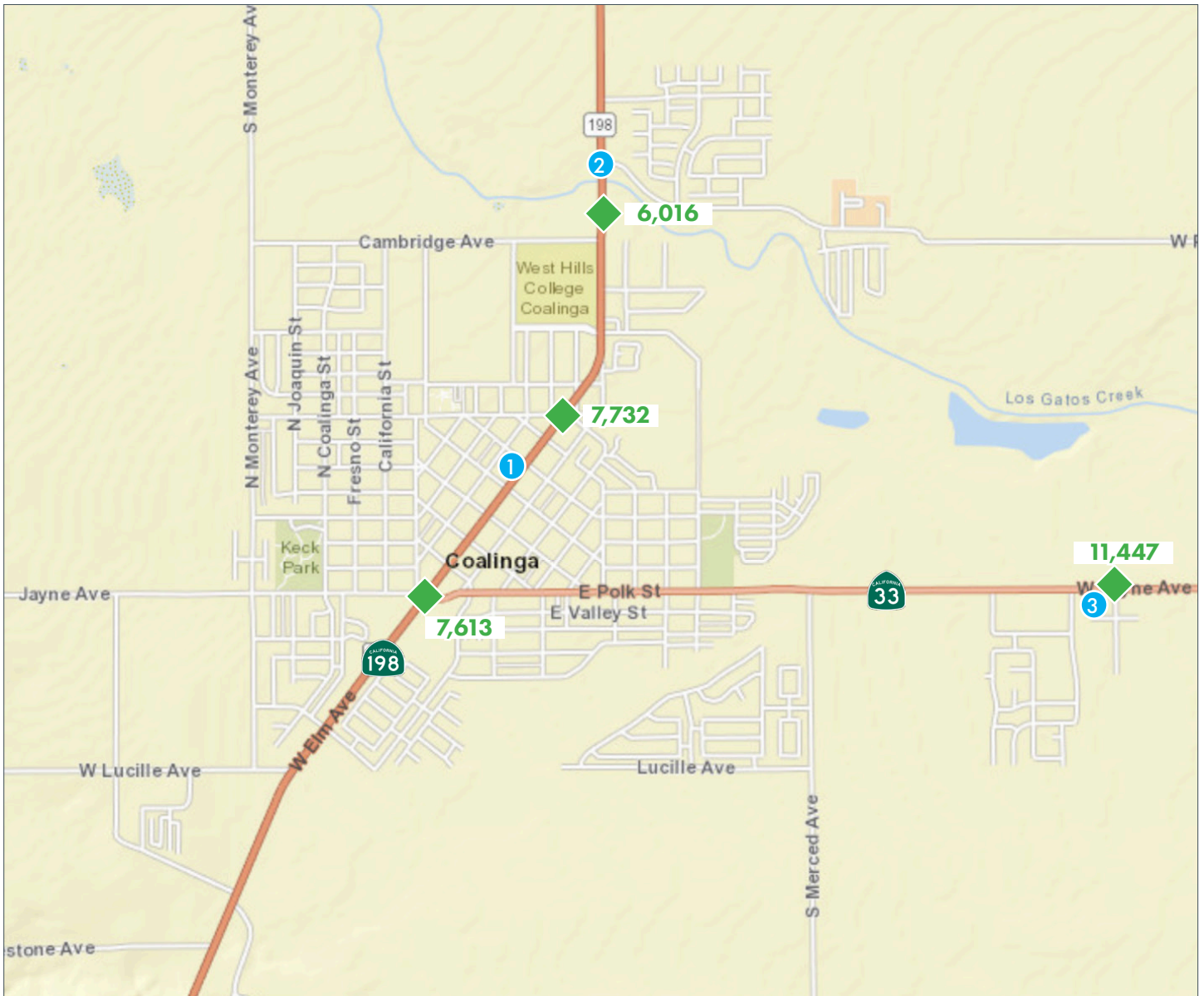
Race/Ethnicity Breakdown



- White - 54.4%
- Two or More - 3.4%
- Other - 28.5%
- American Indian - 1.2%
- Black - 10.0%
- Asian - 2.4%

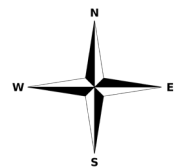
Hispanic Origin Total 58.9%

CITY DATA - TRAFFIC COUNTS



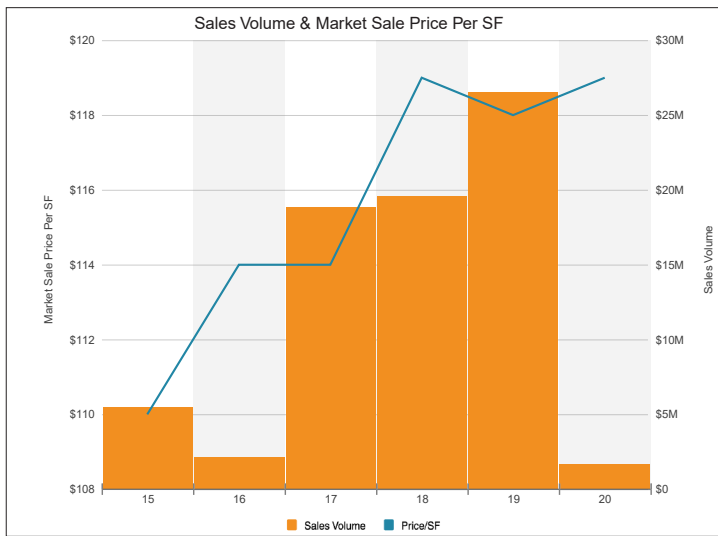
- 1 Proposed Retail Site: Elm Ave. & 5th Ave.
- 2 Proposed Retail Site: Elm Ave. & Phelps Ave.
- 3 Proposed Retail Site: Jayne Ave. Parcel

◆ Average Daily Traffic Volume

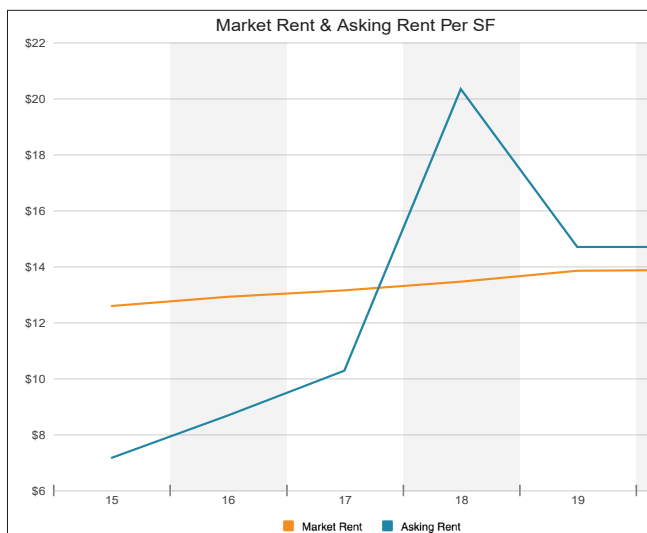


RETAIL REAL ESTATE DATA

Year	Total Inventory SF	Available SF	Vacant SF	Vacancy Rate
2019	737,889	131,263	130,013	17.6%
2018	737,889	133,830	133,830	18.1%
2017	737,889	161,545	158,143	21.4%
2016	762,045	41,910	19,298	2.5%
2015	762,045	52,841	23,912	3.1%



Year	Sales Volume	Price per SF
2019	\$26,517,500	\$118
2018	\$19,556,300	\$119
2017	\$18,815,500	\$114
2016	\$2,119,500	\$114
2015	\$5,456,500	\$110



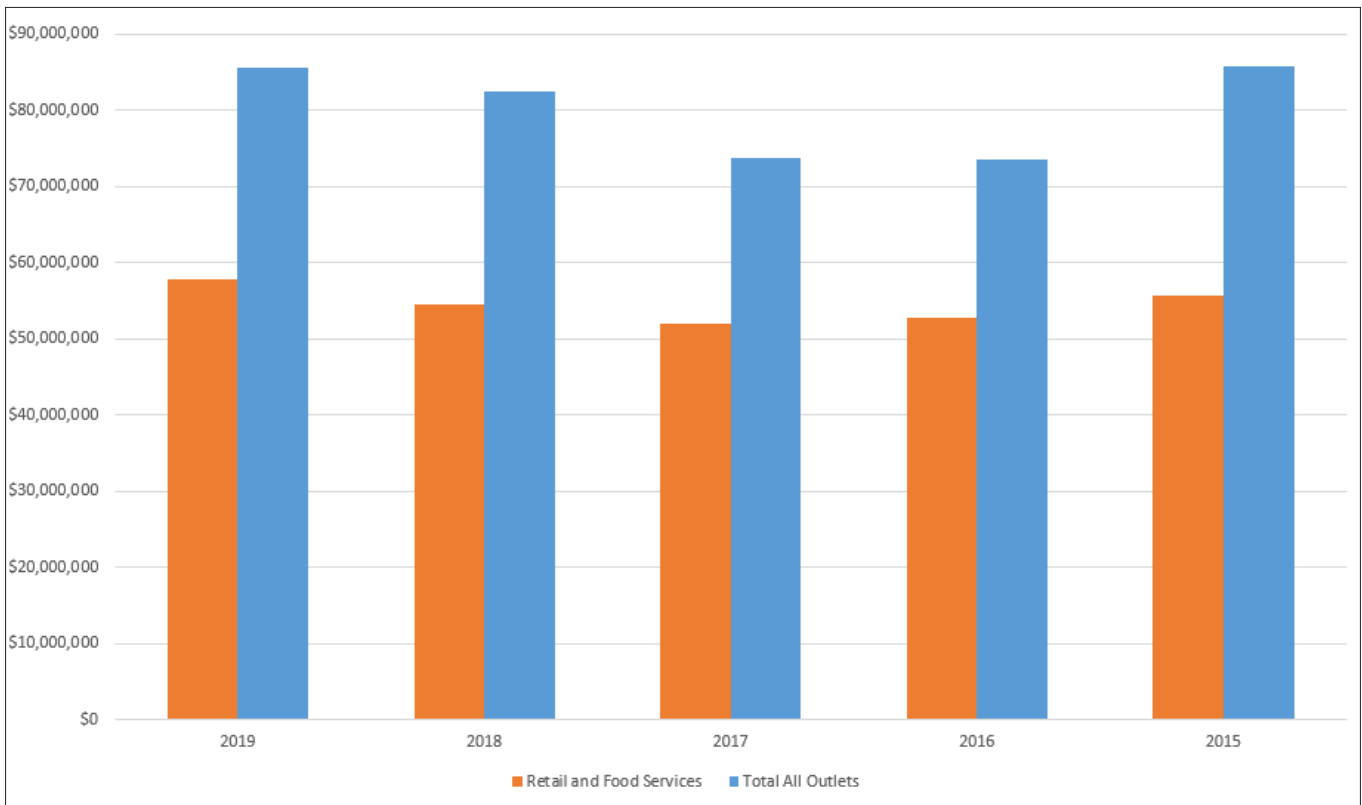
Year	Market Rent/SF	Asking Rent/SF
2019	\$13.85	\$14.70
2018	\$13.46	\$20.34
2017	\$13.15	\$10.28
2016	\$12.92	\$8.68
2015	\$12.59	\$7.16

RETAIL & FOOD SERVICES TRENDS

Retail and Food Services sales have consistently accounted for over 65% of the City of Coalinga’s total taxable transactions between 2015 and 2019. From 2015 to 2017 there was a \$3.8 million decline in Retail and Food Services revenue. This trend reversed in 2018 and increased from \$55.7 million in 2015 to \$57.9 million in 2019, representing 3.8% growth over 5 years.

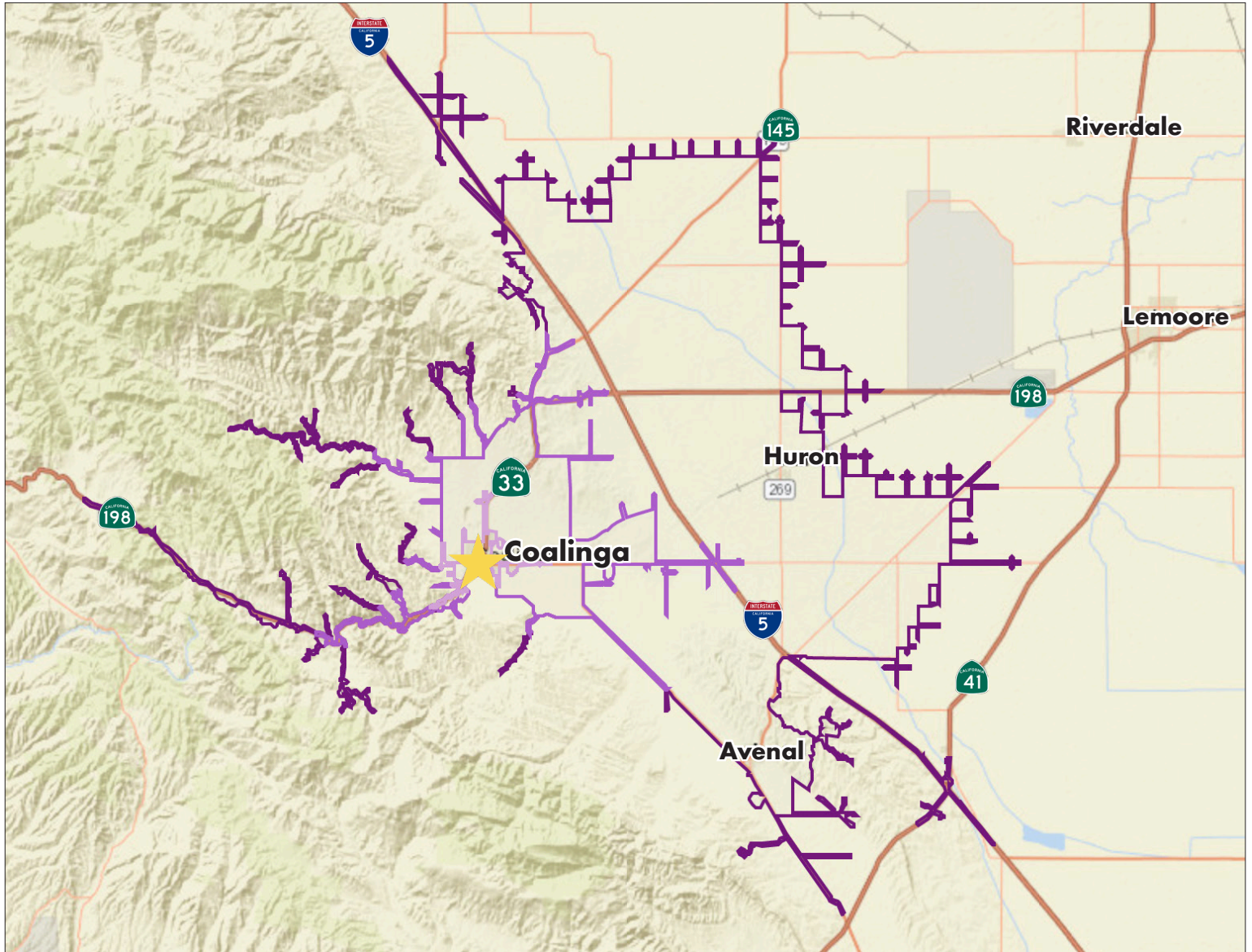
Year	Coalinga Retail & Food Services Sales	Percentage Total Taxable Sales	Coalinga Total Taxable Transactions
2019	\$57,902,896	67.7%	\$85,539,387
2018	\$54,464,556	66.0%	\$82,454,836
2017	\$51,917,344	70.5%	\$73,678,247
2016	\$52,695,426	71.6%	\$73,558,837
2015	\$55,777,914	65.0%	\$85,761,392

Retail & Food Services Sales vs Total Taxable Sales



TRADE AREA ANALYSIS

Elm Ave. & 5th Ave.

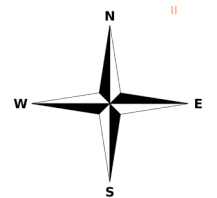


□ 15 Minute Drive-Time

□ 20 Minute Drive-Time

□ 25 Minute Drive-Time

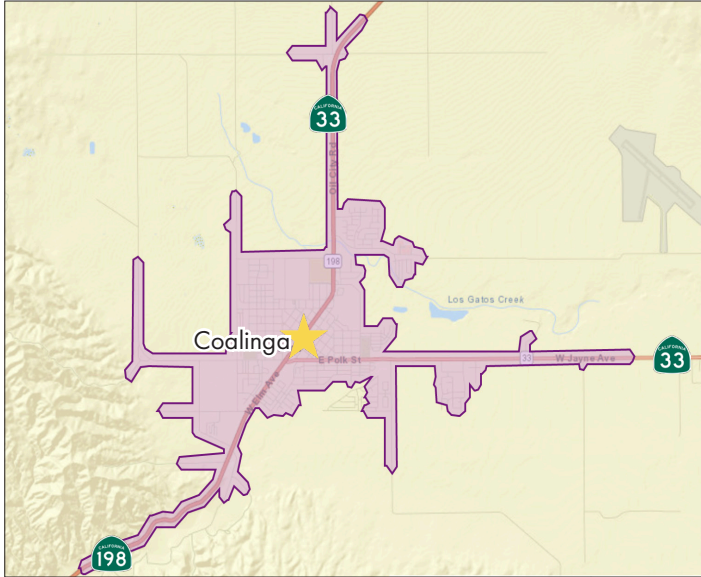
★ Proposed Retail Location



TRADE AREA DETAILS

Elm Ave. & 5th Ave.

5 Minute Drive-Time



Population

11,785

Projected Growth ('19 - '24)

3.0%

Daytime Population

9,203

Households

3,836

Average Income

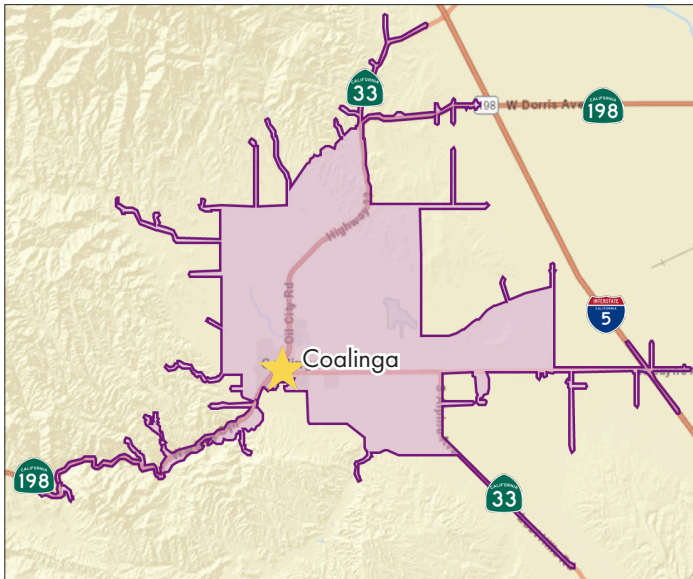
\$76,839

Top Tapestry Segments:

- 11C - Metro Fusion: 25.1%
- 7C - American Dreamers: 24.0%
- 4C - Middleburg: 16.3%

Source: Esri, 2019

15 Minute Drive-Time



Population

17,813

Projected Growth ('19 - '24)

2.1%

Daytime Population

11,198

Households

4,093

Average Income

\$77,973

Top Tapestry Segments:

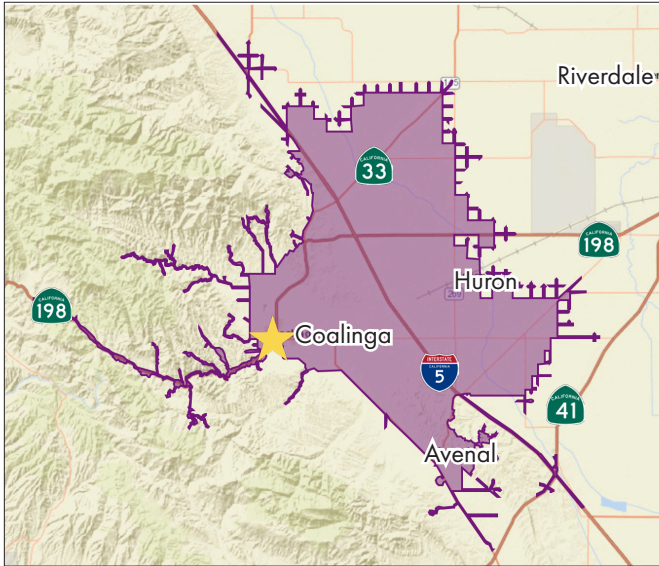
- 11C - Metro Fusion: 23.5%
- 7C - American Dreamers: 22.8%
- 4C - Middleburg: 19.1%

Source: Esri, 2019

TRADE AREA DETAILS

Elm Ave. & 5th Ave.

30 Minute Drive-Time



Source: Esri, 2019

Population

41,304

Projected Growth ('19 - '24)

2.05%

Daytime Population

29,369

Households

8,391

Average Income

\$61,805

Top Tapestry Segments:

7E - Valley Growers: 53.7%

11C - Metro Fusion: 11.5%

7C - American Dreamers: 11.1%

Tapestry Segments

7E - Valley Growers: This is a small, but distinctive market, located almost entirely in the West (primarily California and Washington). These neighborhoods are home to young, Hispanic families with children, and frequently, multiple generations living in single-family homes. This market is all about spending time with family and home, and following the Hispanic heritage.

11C - Metro Fusion: This is a young, diverse market. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children and the majority of residents live in midsize apartment buildings. Metro Fusion is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives.

7C - American Dreamers: Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing—farther out of the city, where housing is more affordable. The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home.

4C - Middleburg: Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers, who are thrifty but willing to carry some debt and are already investing in their futures. Middleburg residents are likely to be savvy mobile device users who prefer to buy U.S. made products and travel in the US. This market is younger but growing in size and assets.

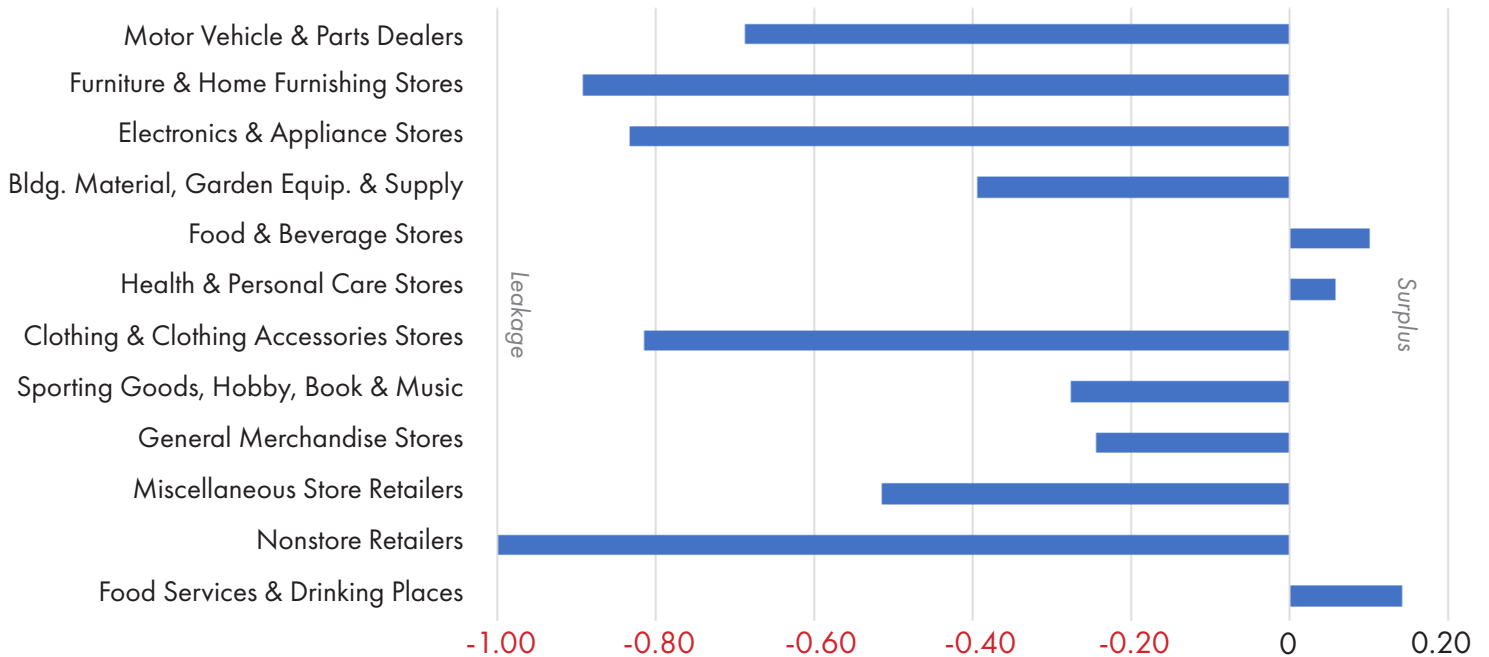
ELM AVE. & 5TH AVE. RETAIL GAP ANALYSIS

Interpreting Retail Gap Index

0 = Equilibrium. Supply and sales are in balance.

-0.2 = Potential exceeds supply by 20%. I.e. **retail leakage** exists.

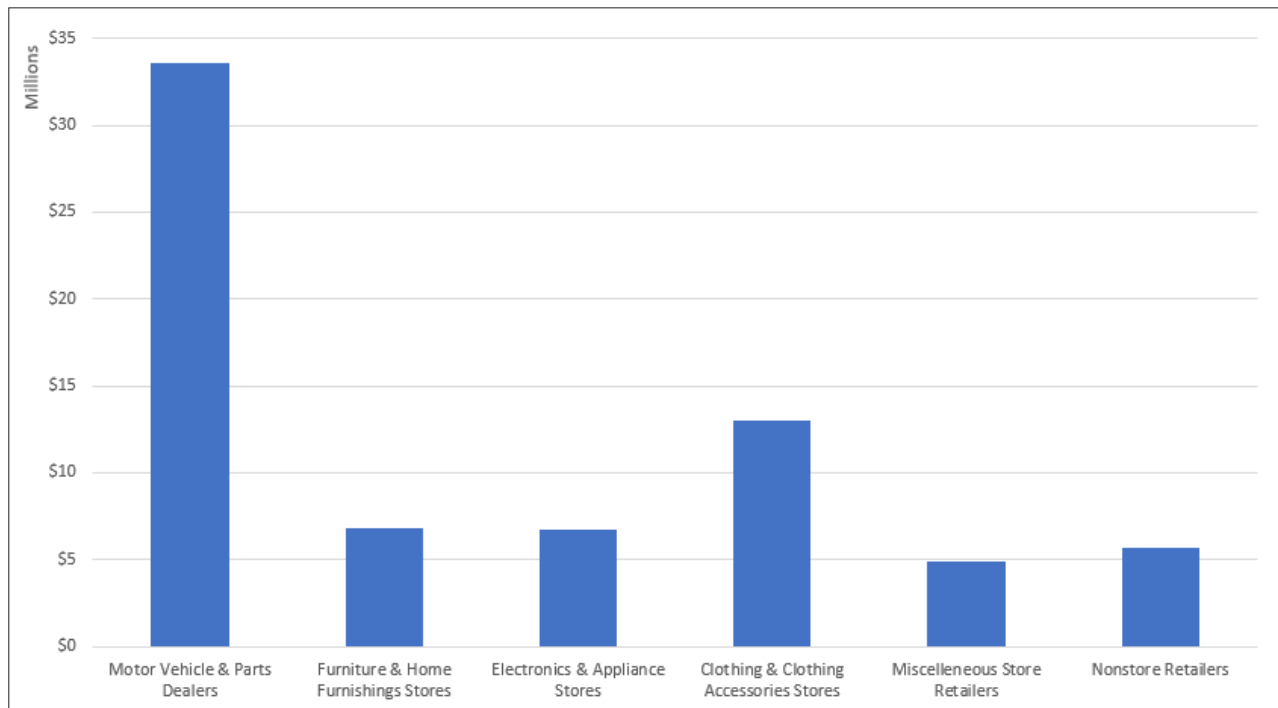
0.2 = Supply exceeds potential by 20%. I.e. retail surplus exists.



Store Type	Potential	Supply	Leakage/Surplus
Motor Vehicle & Parts Dealers	\$41,225,078	\$7,631,210	-0.69
Furniture & Home Furnishings Stores	\$7,199,420	\$405,404	-0.89
Electronics & Appliance Stores	\$7,345,497	\$665,310	-0.83
Building Materials, Garden Equipment & Supply Stores	\$11,054,256	\$4,795,568	-0.39
Food & Beverage Stores	\$33,077,038	\$40,511,568	0.10
Health & Personal Care Stores	\$13,562,822	\$15,257,207	0.06
Clothing & Clothing Accessories Stores	\$14,467,821	\$1,475,195	-0.81
Sporting Goods, Hobby, Book & Music Stores	\$6,481,006	\$3,683,561	-0.28
General Merchandise Stores	\$34,130,625	\$20,720,903	-0.24
Miscellaneous Store Retailers	\$7,266,718	\$2,334,159	-0.51
Nonstore Retailers	\$5,687,705	\$0	-1.00
Food Services & Drinking Places	\$21,722,482	\$28,911,069	0.14
Total	\$203,220,468	\$126,391,154	-0.23

INDUSTRY GROWTH POTENTIAL

Elm Ave. & 5th Ave. currently has 6 industries with the potential for growth, where the demand exceeds supply. They are as follows; (i) **Nonstore Retailers** with a leakage-surplus factor of 100% and excess demand of \$5.7 million; (ii) **Furniture & Home Furnishings Stores** with a leakage-surplus factor of 89.3% and excess demand of \$6.8 million; (iii) **Electronics & Appliance Stores** with a leakage-surplus factor of 83.4% and excess demand of \$6.7 million; (iv) **Clothing & Clothing Accessory Stores** with a leakage-surplus factor 81.5% and an excess demand of \$12.9 million; (v) **Motor Vehicle & Parts Dealers** with a leakage-surplus factor of 68.8% and excess demand of \$33.6 million; and (vi) **Miscellaneous Store Retailers** with a leakage-surplus factor of 51.4% and excess demand of \$4.9 million.



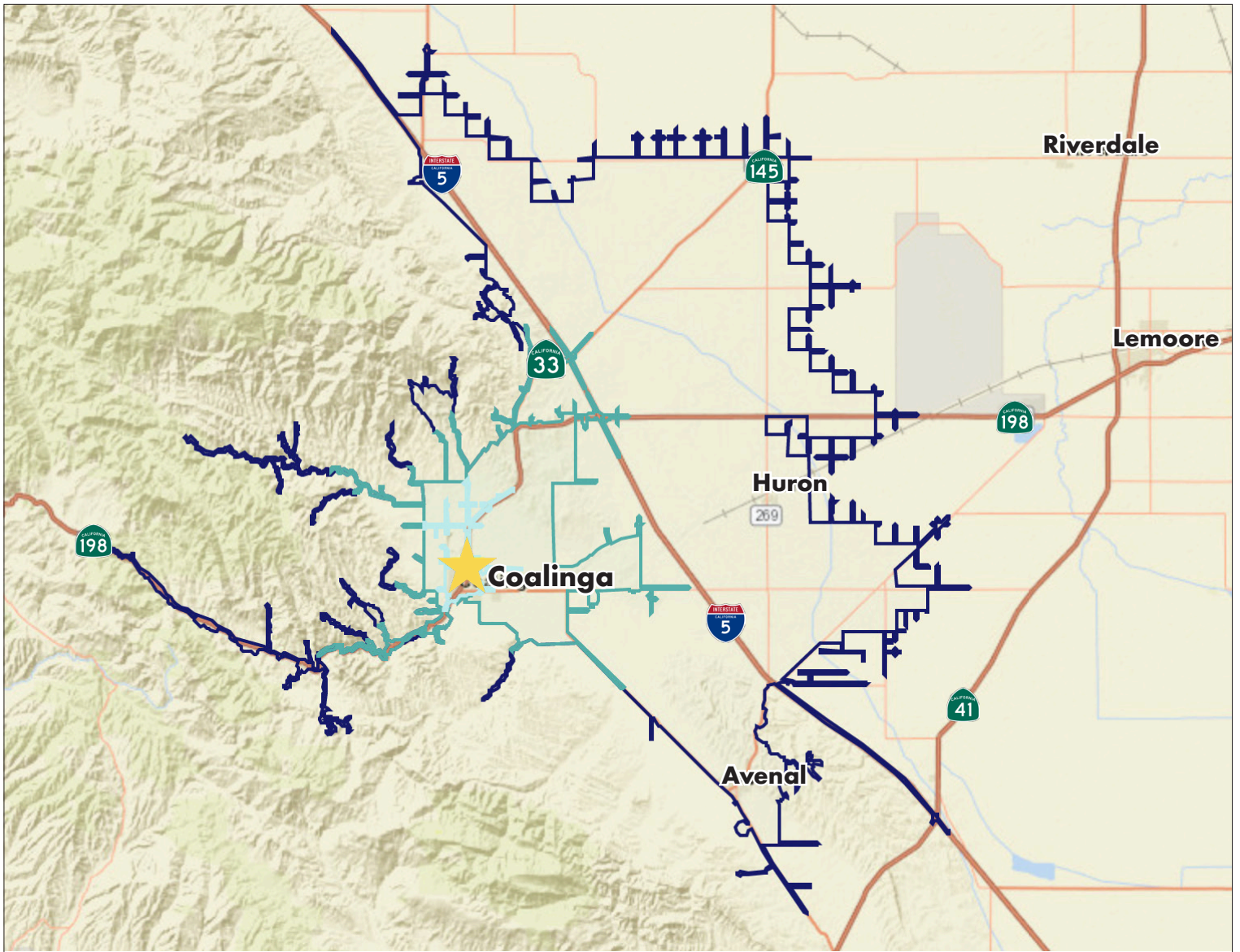
Source: Esri, 2019

INDUSTRY DECLINE POTENTIAL

Elm Ave. & 5th Ave. has only 1 industry with excess supply or a shortage of demand. The industry with the potential to stagnate or decline in both employment and business density is as follows; (i) **Gasoline Stations** with a leakage-surplus factor of -59.1% and an excess supply of \$54.2 million.

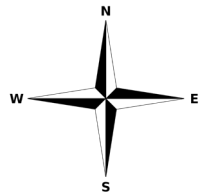
TRADE AREA ANALYSIS

Elm Ave. & Phelps Ave.



- 15 Minute Drive-Time
- 20 Minute Drive-Time
- 25 Minute Drive-Time

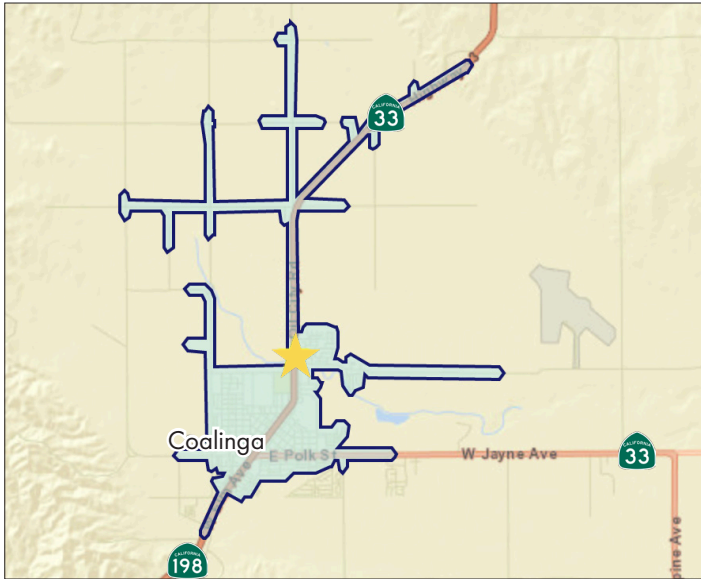
★ Proposed Retail Location



TRADE AREA DETAILS

Elm Ave. & Phelps Ave.

5 Minute Drive-Time



Population

10,758

Projected Growth ('19 - '24)

3.1%

Daytime Population

8,562

Households

3,497

Average Income

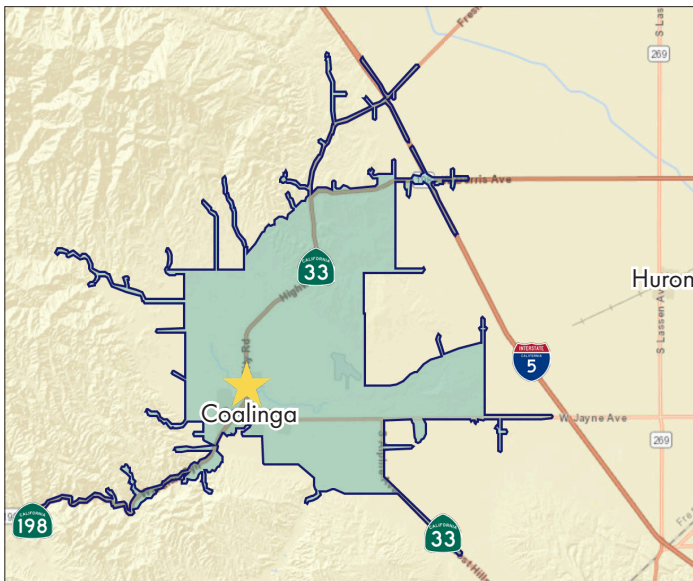
\$73,360

Top Tapestry Segments:

- 11C - Metro Fusion: 27.5%
- 7C - American Dreamers: 25.0%
- 8E - Front Porches: 12.8%

Source: Esri, 2019

15 Minute Drive-Time



Population

17,861

Projected Growth ('19 - '24)

2.1%

Daytime Population

11,232

Households

4,105

Average Income

\$77,919

Top Tapestry Segments:

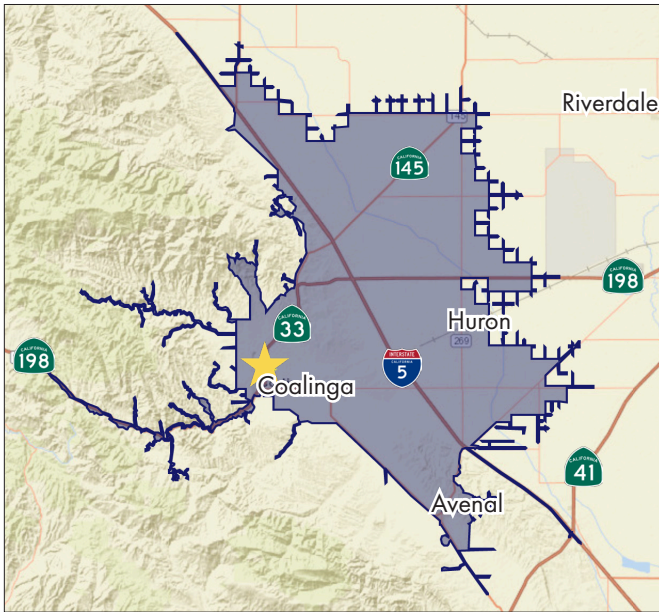
- 11C - Metro Fusion: 23.4%
- 7C - American Dreamers: 22.7%
- 4C - Middleburg: 19.1%

Source: Esri, 2019

TRADE AREA DETAILS

Elm Ave. & Phelps Ave.

30 Minute Drive-Time



Population

41,796

Projected Growth ('19 - '24)

2.05%

Daytime Population

29,623

Households

8,475

Average Income

\$60,932

Top Tapestry Segments:

7E - Valley Growers: 54.2%

11C - Metro Fusion: 11.3%

7C - American Dreamers: 11.0%

Source: Esri, 2019

Tapestry Segments

7E - Valley Growers: This is a small, but distinctive market, located almost entirely in the West (primarily California and Washington). These neighborhoods are home to young, Hispanic families with children, and frequently, multiple generations living in single-family homes. This market is all about spending time with family and home, and following the Hispanic heritage.

11C - Metro Fusion: This is a young, diverse market. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children and the majority of residents live in midsize apartment buildings. Metro Fusion is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives.

7C - American Dreamers: Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing—farther out of the city, where housing is more affordable. The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home.

4C - Middleburg: Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers, who are thrifty but willing to carry some debt and are already investing in their futures. Middleburg residents are likely to be savvy mobile device users who prefer to buy U.S. made products and travel in the US. This market is younger but growing in size and assets.

8E – Front Porches: Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Households tend to own just one vehicle but used only when needed. This market is composed of a blue-collar work force with a strong labor force participation rate. They seek adventure and strive to have fun.

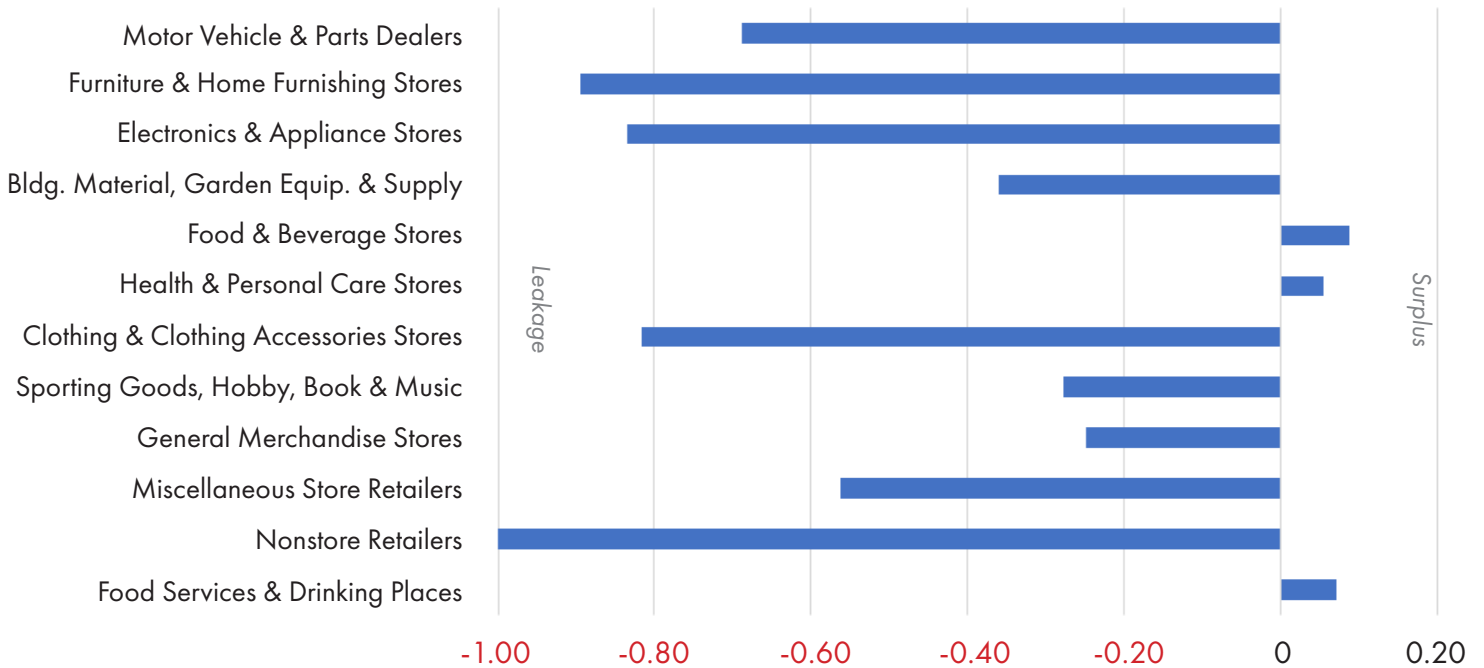
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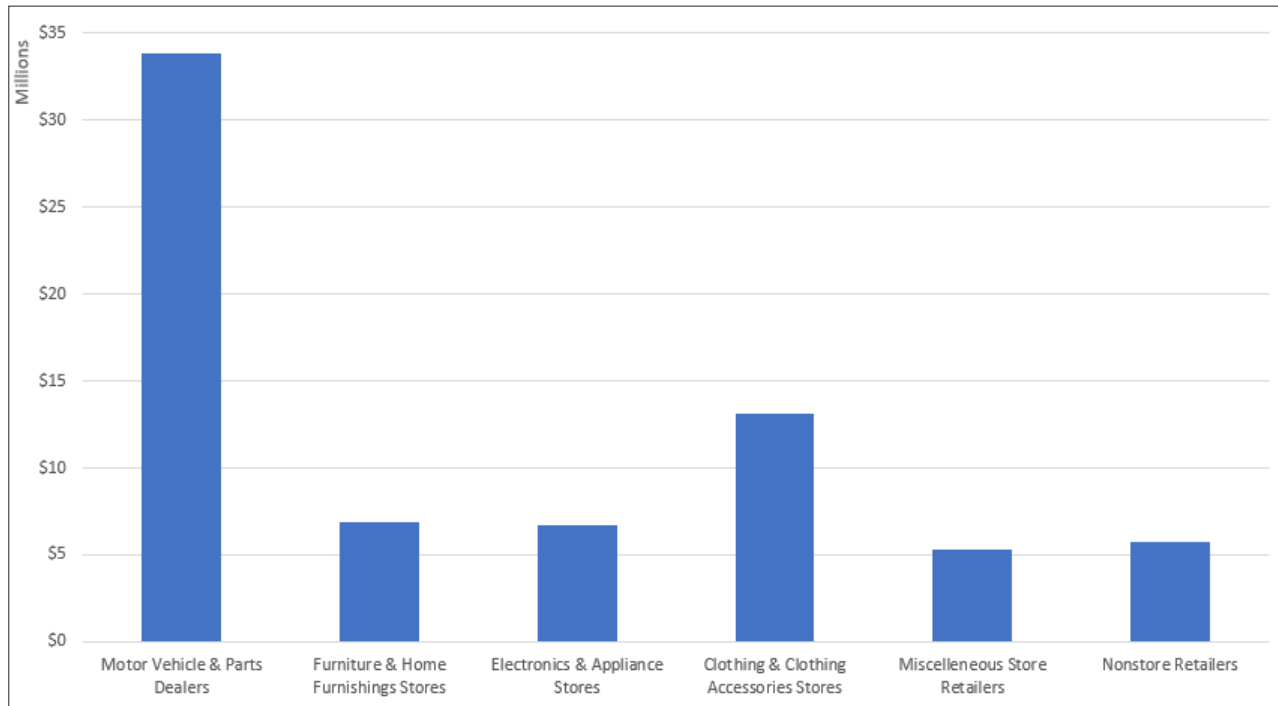
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Store Type	Potential	Supply	Leakage/Surplus
Motor Vehicle & Parts Dealers	\$41,508,415	\$7,688,054	-0.69
Furniture & Home Furnishings Stores	\$7,249,289	\$405,404	-0.89
Electronics & Appliance Stores	\$7,399,195	\$665,310	-0.84
Building Materials, Garden Equipment & Supply Stores	\$11,126,481	\$5,240,161	-0.36
Food & Beverage Stores	\$33,319,059	\$39,697,250	0.09
Health & Personal Care Stores	\$13,658,514	\$15,257,207	0.06
Clothing & Clothing Accessories Stores	\$14,576,661	1,475,195	-0.82
Sporting Goods, Hobby, Book & Music Stores	\$6,529,601	\$3,683,561	-0.28
General Merchandise Stores	\$34,381,201	\$20,677,789	-0.25
Miscellaneous Store Retailers	\$7,317,232	\$2,043,541	-0.56
Nonstore Retailers	\$5,728,787	\$0	-1.00
Food Services & Drinking Places	\$21,879,849	\$25,232,077	0.07
Total	\$204,674,284	\$122,065,549	-0.25

INDUSTRY GROWTH POTENTIAL

Elm Ave. & W Phelps Ave. currently has 6 industries with the potential for growth, where the demand exceeds supply. They are as follows; (i) **Nonstore Retailers** with a leakage-surplus factor of 100% and excess demand of \$5.7 million; (ii) **Furniture & Home Furnishings Stores** with a leakage-surplus factor of 89.4% and excess demand of \$6.8 million; (iii) **Electronics & Appliance Stores** with a leakage-surplus factor of 83.5% and excess demand of \$6.7 million; (iv) **Clothing & Clothing Accessory Stores** with a leakage-surplus factor 81.6% and an excess demand of \$13.1 million; (v) **Motor Vehicle & Parts Dealers** with a leakage-surplus factor of 68.7% and excess demand of \$33.8 million; and (vi) **Miscellaneous Store Retailers** with a leakage-surplus factor of 56.3% and excess demand of \$5.3 million.



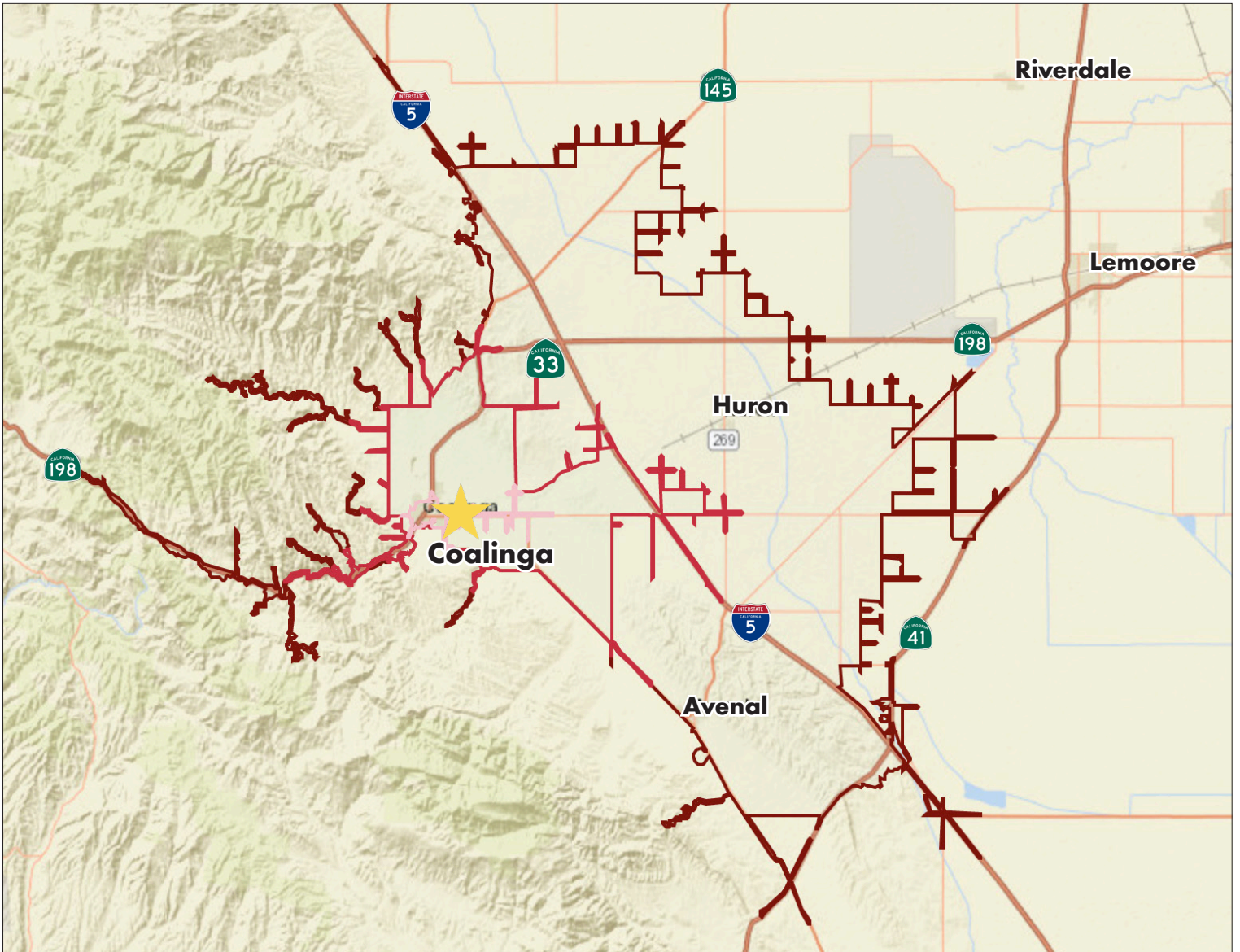
Source: Esri, 2019




INDUSTRY DECLINE POTENTIAL

Elm Ave. & W Phelps Ave. has only 1 industry with excess supply or a shortage of demand. The industry with the potential to stagnate or decline in both employment and business density is as follows; (i) **Gasoline Stations** with a leakage-surplus factor of -47.4% and an excess supply of \$34 million.

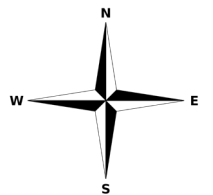
TRADE AREA ANALYSIS

Jayne Ave. Parcel - West of Best Western



-  15 Minute Drive-Time
-  20 Minute Drive-Time
-  25 Minute Drive-Time

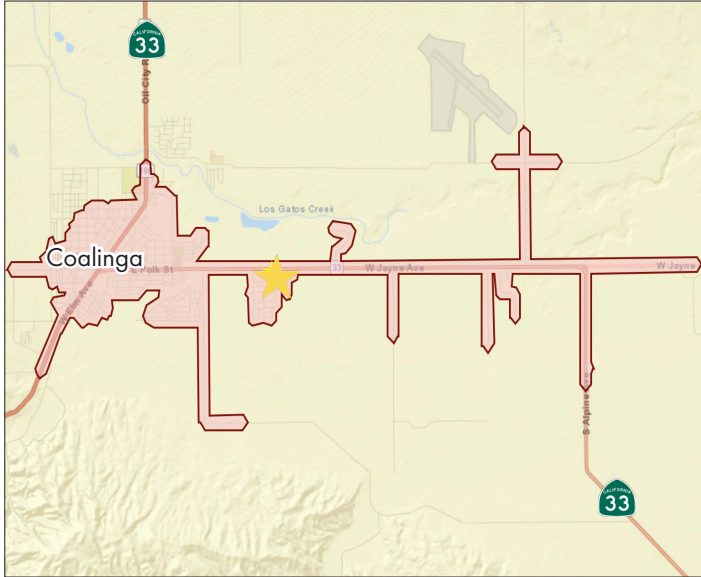
 Proposed Retail Location



TRADE AREA DETAILS

Jayne Ave. Parcel - West of Best Western

5 Minute Drive-Time



Population

8,701

Projected Growth ('19 - '24)

3.2%

Daytime Population

7,164

Households

2,933

Average Income

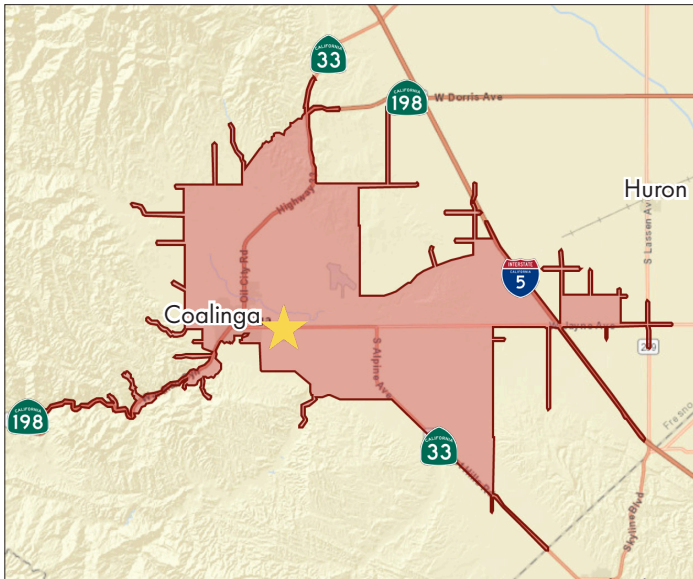
\$72,050

Top Tapestry Segments:

- 7C - American Dreamers: 31.8%
- 11C - Metro Fusion: 31.8%
- 8E - Front Proches: 15.3%

Source: Esri, 2019

15 Minute Drive-Time



Population

18,770

Projected Growth ('19 - '24)

2.0%

Daytime Population

14,132

Households

4,097

Average Income

\$77,987

Top Tapestry Segments:

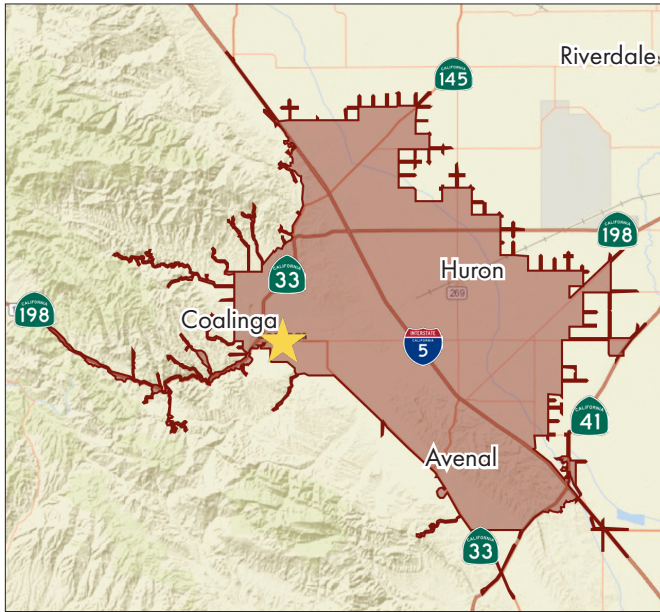
- 11C - Metro Fusion: 23.5%
- 7C - American Dreamers: 22.8%
- 4C - Middleburg: 19.2%

Source: Esri, 2019

TRADE AREA DETAILS

Jayne Ave. Parcel - West of Best Western

30 Minute Drive-Time



Population

42,538

Projected Growth ('19 - '24)

2.05%

Daytime Population

30,055

Households

8,706

Average Income

\$60,841

Top Tapestry Segments:

7E - Valley Growers: 55.4%

11C - Metro Fusion: 11.0%

7C - American Dreamers: 10.7%

Source: Esri, 2019

Tapestry Segments

7E - Valley Growers: This is a small, but distinctive market, located almost entirely in the West (primarily California and Washington). These neighborhoods are home to young, Hispanic families with children, and frequently, multiple generations living in single-family homes. This market is all about spending time with family and home, and following the Hispanic heritage.

11C - Metro Fusion: This is a young, diverse market. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children and the majority of residents live in midsize apartment buildings. Metro Fusion is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives.

7C - American Dreamers: Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing—farther out of the city, where housing is more affordable. The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home.

4C - Middleburg: Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers, who are thrifty but willing to carry some debt and are already investing in their futures. Middleburg residents are likely to be savvy mobile device users who prefer to buy U.S. made products and travel in the US. This market is younger but growing in size and assets.

8E - Front Porches: Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Households tend to own just one vehicle but used only when needed. This market is composed of a blue-collar work force with a strong labor force participation rate. They seek adventure and strive to have fun.

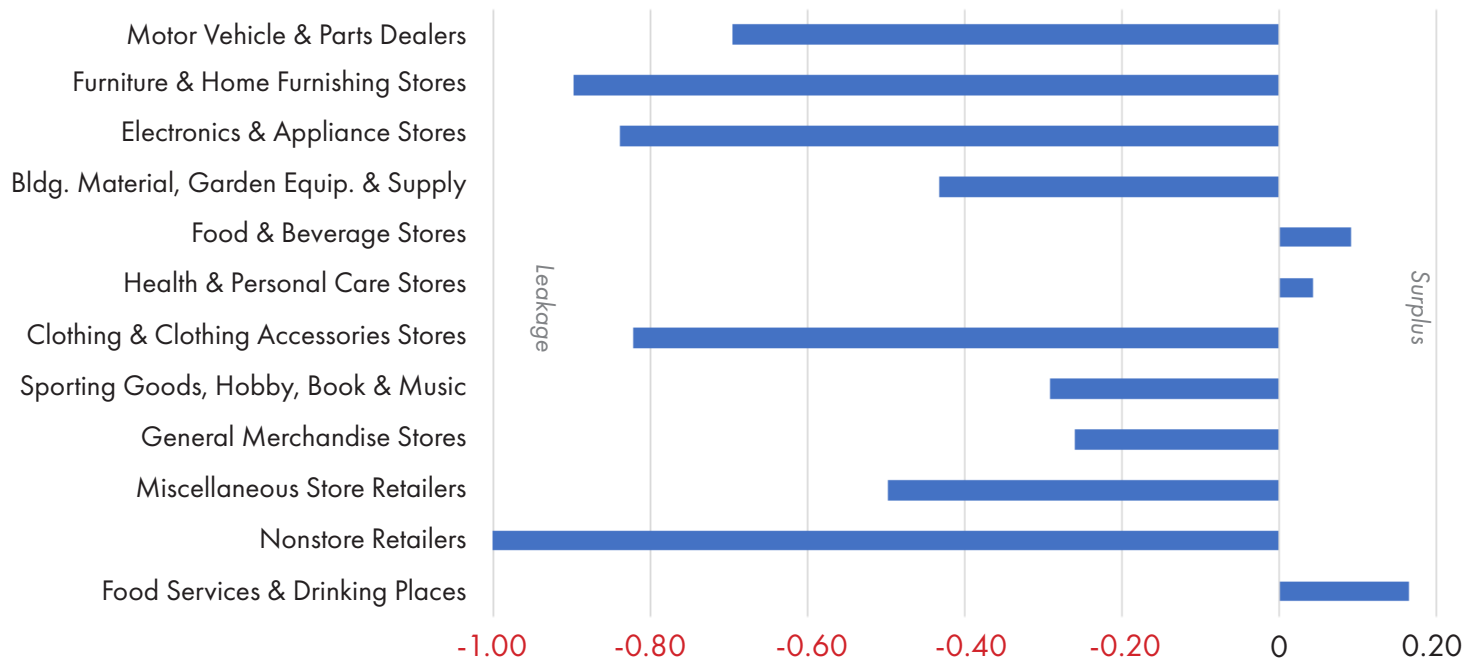
JAYNE AVE. PARCEL RETAIL GAP ANALYSIS

Interpreting Retail Gap Index

0 = Equilibrium. Supply and sales are in balance.

-0.2 = Potential exceeds supply by 20%. I.e. **retail leakage** exists.

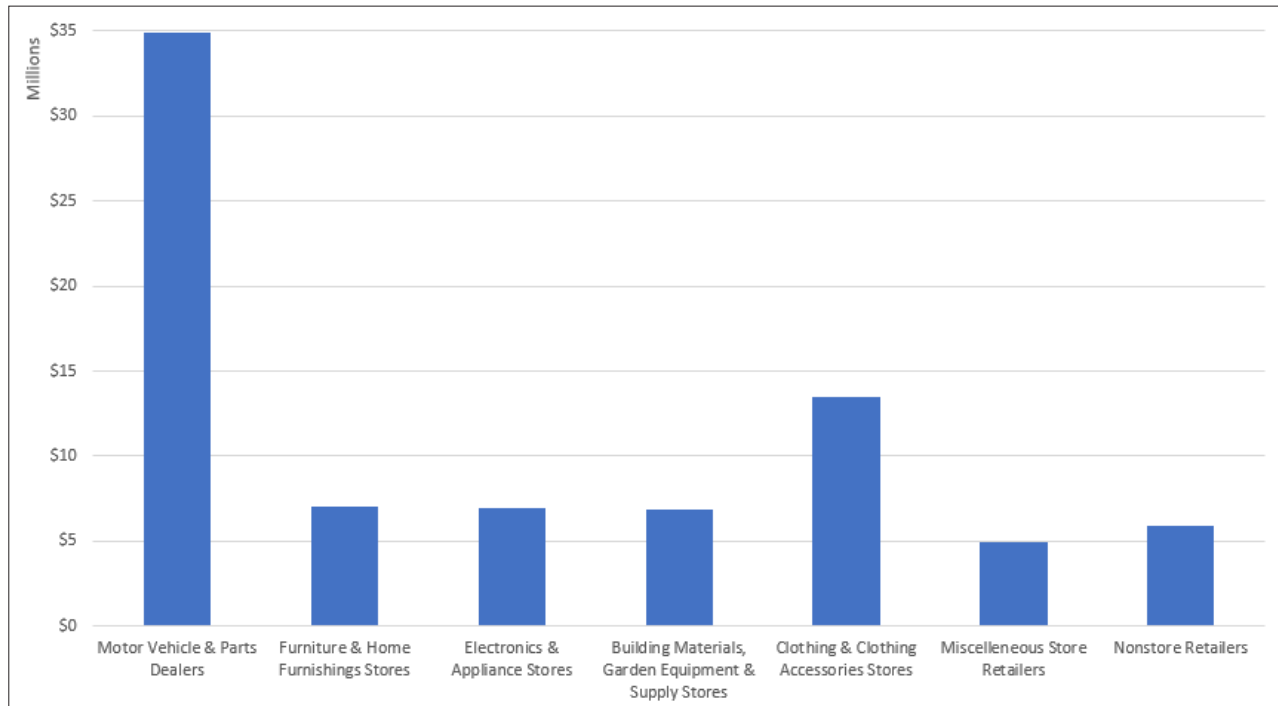
0.2 = Supply exceeds potential by 20%. I.e. retail surplus exists.



Store Type	Potential	Supply	Leakage/Surplus
Motor Vehicle & Parts Dealers	\$42,497,116	\$7,618,372	-0.70
Furniture & Home Furnishings Stores	\$7,423,304	\$405,404	-0.90
Electronics & Appliance Stores	\$7,586,579	\$665,310	-0.84
Building Materials, Garden Equipment & Supply Stores	\$11,378,509	\$4,520,673	-0.43
Food & Beverage Stores	\$34,163,606	\$41,150,134	0.09
Health & Personal Care Stores	\$13,992,436	\$15,257,207	0.04
Clothing & Clothing Accessories Stores	\$14,956,457	1,475,195	-0.82
Sporting Goods, Hobby, Book & Music Stores	\$6,699,172	\$3,683,561	-0.29
General Merchandise Stores	\$35,255,591	\$20,754,375	-0.26
Miscellaneous Store Retailers	\$7,493,499	\$2,521,970	-0.50
Nonstore Retailers	\$5,872,144	\$0	-1.00
Food Services & Drinking Places	\$22,428,979	\$31,358,103	0.17
Total	\$209,747,392	\$129,410,304	-0.24

INDUSTRY GROWTH POTENTIAL

The Jayne Avenue parcel west of Best Western currently has 7 industries with the potential for growth, where the demand exceeds supply. They are as follows; (i) **Nonstore Retailers** with a leakage-surplus factor of 100% and excess demand of \$5.9 million; (ii) **Furniture & Home Furnishings Stores** with a leakage-surplus factor of 89.6% and excess demand of \$7 million; (iii) **Electronics & Appliance Stores** with a leakage-surplus factor of 83.9% and excess demand of \$6.9 million; (iv) **Clothing & Clothing Accessory Stores** with a leakage-surplus factor 82% and an excess demand of \$13.5 million; (v) **Motor Vehicle & Parts Dealers** with a leakage-surplus factor of 69.6% and excess demand of \$34.5 million; (vi) **Miscellaneous Store Retailers** with a leakage-surplus factor of 49.6% and excess demand of \$4.9 million; and (vii) **Building Materials, Garden Equipment & Supply Stores** with a leakage-surplus factor of 43.1% and excess demand of \$6.9 million.

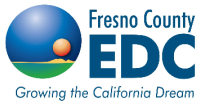


Source: Esri, 2019

INDUSTRY DECLINE POTENTIAL

The parcel west of Best Western has only 1 industry with excess supply or a shortage of demand. The industry with the potential to stagnate or decline in both employment and business density is as follows; (i) **Gasoline Stations** with a leakage-surplus factor of -63.4% and an excess supply of \$67 million.

APPENDIX - ELM AVE. & 5TH AVE. LEAKAGE



Retail MarketPlace Profile

Study #1 - SWC Elm Ave & 5th St
 W Elm Ave & N 5th St, Coalinga, California, 93210
 Drive Time: 30 minute radius

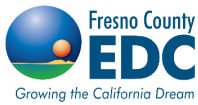
Prepared by Fresno County EDC
 Latitude: 36.13974
 Longitude: -120.36030

Summary Demographics						
2019 Population						41,304
2019 Households						8,391
2019 Median Disposable Income						\$36,768
2019 Per Capita Income						\$13,179
2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$221,946,005	\$199,326,708	\$22,619,297	5.4	164
Total Retail Trade	44-45	\$200,223,522	\$170,415,639	\$29,807,883	8.0	103
Total Food & Drink	722	\$21,722,482	\$28,911,069	-\$7,188,587	-14.2	61
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$41,225,078	\$7,631,210	\$33,593,868	68.8	12
Automobile Dealers	4411	\$32,657,571	\$1,320,200	\$31,337,371	92.2	2
Other Motor Vehicle Dealers	4412	\$4,964,113	\$0	\$4,964,113	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$3,603,394	\$6,311,010	-\$2,707,616	-27.3	10
Furniture & Home Furnishings Stores	442	\$7,199,420	\$405,404	\$6,794,016	89.3	1
Furniture Stores	4421	\$3,795,068	\$405,404	\$3,389,664	80.7	1
Home Furnishings Stores	4422	\$3,404,352	\$0	\$3,404,352	100.0	0
Electronics & Appliance Stores	443	\$7,345,497	\$665,310	\$6,680,187	83.4	1
Bldg Materials, Garden Equip. & Supply Stores	444	\$11,054,256	\$4,795,568	\$6,258,688	39.5	8
Bldg Material & Supplies Dealers	4441	\$10,370,935	\$3,569,093	\$6,801,842	48.8	7
Lawn & Garden Equip & Supply Stores	4442	\$683,321	\$1,226,475	-\$543,154	-28.4	1
Food & Beverage Stores	445	\$33,077,038	\$40,511,568	-\$7,434,530	-10.1	26
Grocery Stores	4451	\$28,375,912	\$36,177,420	-\$7,801,508	-12.1	21
Specialty Food Stores	4452	\$2,367,955	\$560,815	\$1,807,140	61.7	3
Beer, Wine & Liquor Stores	4453	\$2,333,170	\$3,773,333	-\$1,440,163	-23.6	2
Health & Personal Care Stores	446,4461	\$13,562,822	\$15,257,207	-\$1,694,385	-5.9	6
Gasoline Stations	447,4471	\$18,725,537	\$72,935,555	-\$54,210,018	-59.1	19
Clothing & Clothing Accessories Stores	448	\$14,467,821	\$1,475,195	\$12,992,626	81.5	4
Clothing Stores	4481	\$10,420,633	\$1,095,989	\$9,324,644	81.0	3
Shoe Stores	4482	\$1,851,358	\$379,206	\$1,472,152	66.0	1
Jewelry, Luggage & Leather Goods Stores	4483	\$2,195,830	\$0	\$2,195,830	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$6,481,006	\$3,683,561	\$2,797,445	27.5	3
Sporting Goods/Hobby/Musical Instr Stores	4511	\$5,601,505	\$3,412,506	\$2,188,999	24.3	2
Book, Periodical & Music Stores	4512	\$879,501	\$271,055	\$608,446	52.9	1
General Merchandise Stores	452	\$34,130,625	\$20,720,903	\$13,409,722	24.4	11
Department Stores Excluding Leased Depts.	4521	\$20,352,881	\$13,208,438	\$7,144,443	21.3	2
Other General Merchandise Stores	4529	\$13,777,744	\$7,512,465	\$6,265,279	29.4	9
Miscellaneous Store Retailers	453	\$7,266,718	\$2,334,159	\$4,932,559	51.4	12
Florists	4531	\$280,395	\$355,274	-\$74,879	-11.8	3
Office Supplies, Stationery & Gift Stores	4532	\$1,684,885	\$474,985	\$1,209,900	56.0	2
Used Merchandise Stores	4533	\$777,385	\$737,762	\$39,623	2.6	4
Other Miscellaneous Store Retailers	4539	\$4,524,052	\$766,137	\$3,757,915	71.0	3
Nonstore Retailers	454	\$5,687,705	\$0	\$5,687,705	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$5,068,605	\$0	\$5,068,605	100.0	0
Vending Machine Operators	4542	\$92,750	\$0	\$92,750	100.0	0
Direct Selling Establishments	4543	\$526,349	\$0	\$526,349	100.0	0
Food Services & Drinking Places	722	\$21,722,482	\$28,911,069	-\$7,188,587	-14.2	61
Special Food Services	7223	\$418,919	\$0	\$418,919	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$445,017	\$219,672	\$225,345	33.9	1
Restaurants/Other Eating Places	7225	\$20,858,547	\$28,691,397	-\$7,832,850	-15.8	60

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

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APPENDIX - ELM AVE. & PHELPS AVE. LEAKAGE



Retail MarketPlace Profile

Study #2 - Elm Ave & Phelps
 E Elm Ave & W Phelps Ave, Coalinga, California, 93210
 Drive Time: 30 minute radius

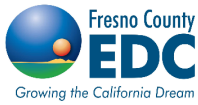
Prepared by Fresno County EDC
 Latitude: 36.15418
 Longitude: -120.35445

Summary Demographics						
2019 Population						41,790
2019 Households						8,473
2019 Median Disposable Income						\$36,690
2019 Per Capita Income						\$13,150
2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$223,537,647	\$174,990,568	\$48,547,079	12.2	154
Total Retail Trade	44-45	\$201,657,798	\$149,758,491	\$51,899,307	14.8	98
Total Food & Drink	722	\$21,879,849	\$25,232,077	-\$3,352,228	-7.1	56
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$41,508,415	\$7,688,054	\$33,820,361	68.7	11
Automobile Dealers	4411	\$32,880,773	\$1,320,200	\$31,560,573	92.3	2
Other Motor Vehicle Dealers	4412	\$4,998,174	\$0	\$4,998,174	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$3,629,468	\$6,367,854	-\$2,738,386	-27.4	9
Furniture & Home Furnishings Stores	442	\$7,249,289	\$405,404	\$6,843,885	89.4	1
Furniture Stores	4421	\$3,821,162	\$405,404	\$3,415,758	80.8	1
Home Furnishings Stores	4422	\$3,428,127	\$0	\$3,428,127	100.0	0
Electronics & Appliance Stores	443	\$7,399,195	\$665,310	\$6,733,885	83.5	1
Bldg Materials, Garden Equip. & Supply Stores	444	\$11,126,481	\$5,240,161	\$5,886,320	36.0	9
Bldg Material & Supplies Dealers	4441	\$10,439,180	\$3,551,466	\$6,887,714	49.2	7
Lawn & Garden Equip & Supply Stores	4442	\$687,301	\$1,688,695	-\$1,001,394	-42.1	2
Food & Beverage Stores	445	\$33,319,059	\$39,697,250	-\$6,378,191	-8.7	25
Grocery Stores	4451	\$28,583,964	\$35,034,666	-\$6,450,702	-10.1	20
Specialty Food Stores	4452	\$2,385,441	\$560,815	\$1,824,626	61.9	3
Beer, Wine & Liquor Stores	4453	\$2,349,653	\$4,101,768	-\$1,752,115	-27.2	3
Health & Personal Care Stores	446,4461	\$13,658,514	\$15,257,207	-\$1,598,693	-5.5	6
Gasoline Stations	447,4471	\$18,863,364	\$52,925,020	-\$34,061,656	-47.4	15
Clothing & Clothing Accessories Stores	448	\$14,576,661	\$1,475,195	\$13,101,466	81.6	4
Clothing Stores	4481	\$10,499,268	\$1,095,989	\$9,403,279	81.1	3
Shoe Stores	4482	\$1,865,295	\$379,206	\$1,486,089	66.2	1
Jewelry, Luggage & Leather Goods Stores	4483	\$2,212,098	\$0	\$2,212,098	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$6,529,601	\$3,683,561	\$2,846,040	27.9	3
Sporting Goods/Hobby/Musical Instr Stores	4511	\$5,643,616	\$3,412,506	\$2,231,110	24.6	2
Book, Periodical & Music Stores	4512	\$885,985	\$271,055	\$614,930	53.1	1
General Merchandise Stores	452	\$34,381,201	\$20,677,789	\$13,703,412	24.9	10
Department Stores Excluding Leased Depts.	4521	\$20,503,693	\$13,198,796	\$7,304,897	21.7	2
Other General Merchandise Stores	4529	\$13,877,507	\$7,478,993	\$6,398,514	30.0	9
Miscellaneous Store Retailers	453	\$7,317,232	\$2,043,541	\$5,273,691	56.3	12
Florists	4531	\$282,040	\$347,742	-\$65,702	-10.4	3
Office Supplies, Stationery & Gift Stores	4532	\$1,696,881	\$193,268	\$1,503,613	79.5	2
Used Merchandise Stores	4533	\$782,957	\$729,969	\$52,988	3.5	4
Other Miscellaneous Store Retailers	4539	\$4,555,354	\$772,563	\$3,782,791	71.0	3
Nonstore Retailers	454	\$5,728,787	\$0	\$5,728,787	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$5,105,773	\$0	\$5,105,773	100.0	0
Vending Machine Operators	4542	\$93,435	\$0	\$93,435	100.0	0
Direct Selling Establishments	4543	\$529,579	\$0	\$529,579	100.0	0
Food Services & Drinking Places	722	\$21,879,849	\$25,232,077	-\$3,352,228	-7.1	56
Special Food Services	7223	\$421,695	\$0	\$421,695	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$448,154	\$219,672	\$228,482	34.2	1
Restaurants/Other Eating Places	7225	\$21,010,000	\$25,012,405	-\$4,002,405	-8.7	55

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

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APPENDIX - JAYNE AVE. PARCEL LEAKAGE



Retail MarketPlace Profile

Study #3 - Parcel W of Best Western
 288-498 Juniper Ridge Blvd, Coalinga, California, 93210
 Drive Time: 30 minute radius

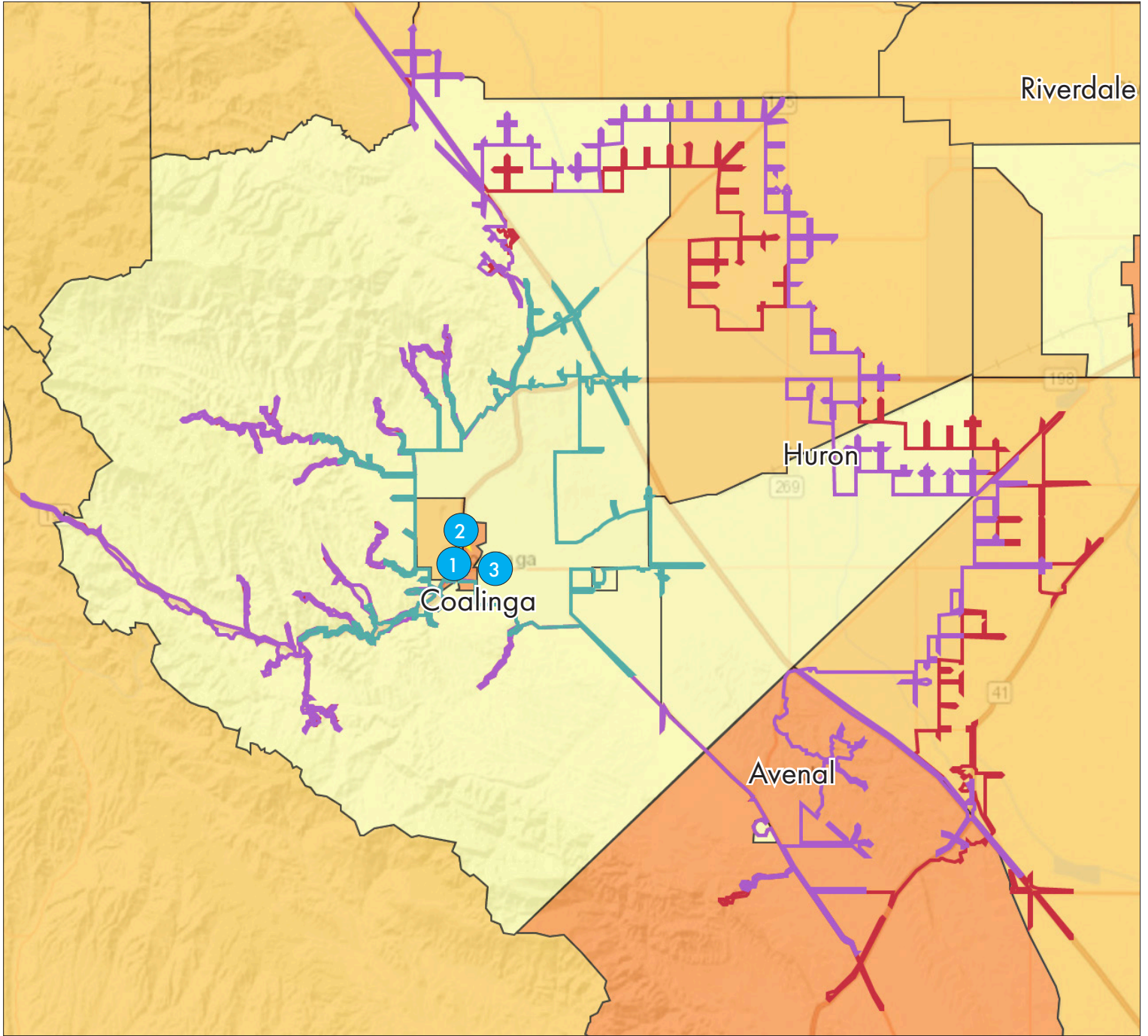
Prepared by Fresno County EDC
 Latitude: 36.13605
 Longitude: -120.33081

Summary Demographics						
2019 Population						42,583
2019 Households						8,706
2019 Median Disposable Income						\$36,741
2019 Per Capita Income						\$13,205
2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$229,091,707	\$215,851,806	\$13,239,901	3.0	170
Total Retail Trade	44-45	\$206,662,728	\$184,493,703	\$22,169,025	5.7	106
Total Food & Drink	722	\$22,428,979	\$31,358,103	-\$8,929,124	-16.6	64
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$42,497,116	\$7,618,372	\$34,878,744	69.6	12
Automobile Dealers	4411	\$33,659,641	\$1,320,200	\$32,339,441	92.5	2
Other Motor Vehicle Dealers	4412	\$5,117,025	\$0	\$5,117,025	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$3,720,450	\$6,298,172	-\$2,577,722	-25.7	10
Furniture & Home Furnishings Stores	442	\$7,423,304	\$405,404	\$7,017,900	89.6	1
Furniture Stores	4421	\$3,912,215	\$405,404	\$3,506,811	81.2	1
Home Furnishings Stores	4422	\$3,511,089	\$0	\$3,511,089	100.0	0
Electronics & Appliance Stores	443	\$7,586,579	\$665,310	\$6,921,269	83.9	1
Bldg Materials, Garden Equip. & Supply Stores	444	\$11,378,509	\$4,520,673	\$6,857,836	43.1	8
Bldg Material & Supplies Dealers	4441	\$10,677,319	\$3,569,093	\$7,108,226	49.9	7
Lawn & Garden Equip & Supply Stores	4442	\$701,190	\$951,580	-\$250,390	-15.1	1
Food & Beverage Stores	445	\$34,163,606	\$41,150,134	-\$6,986,528	-9.3	27
Grocery Stores	4451	\$29,309,973	\$36,996,626	-\$7,686,653	-11.6	22
Specialty Food Stores	4452	\$2,446,461	\$560,815	\$1,885,646	62.7	3
Beer, Wine & Liquor Stores	4453	\$2,407,172	\$3,592,694	-\$1,185,522	-19.8	2
Health & Personal Care Stores	446,4461	\$13,992,436	\$15,257,207	-\$1,264,771	-4.3	6
Gasoline Stations	447,4471	\$19,344,314	\$86,441,502	-\$67,097,188	-63.4	21
Clothing & Clothing Accessories Stores	448	\$14,956,457	\$1,475,195	\$13,481,262	82.0	4
Clothing Stores	4481	\$10,773,667	\$1,095,989	\$9,677,678	81.5	3
Shoe Stores	4482	\$1,913,930	\$379,206	\$1,534,724	66.9	1
Jewelry, Luggage & Leather Goods Stores	4483	\$2,268,861	\$0	\$2,268,861	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$6,699,172	\$3,683,561	\$3,015,611	29.0	3
Sporting Goods/Hobby/Musical Instr Stores	4511	\$5,790,562	\$3,412,506	\$2,378,056	25.8	2
Book, Periodical & Music Stores	4512	\$908,610	\$271,055	\$637,555	54.0	1
General Merchandise Stores	452	\$35,255,591	\$20,754,375	\$14,501,216	25.9	11
Department Stores Excluding Leased Depts.	4521	\$21,029,956	\$13,208,438	\$7,821,518	22.8	2
Other General Merchandise Stores	4529	\$14,225,635	\$6,754,937	\$6,799,698	30.7	9
Miscellaneous Store Retailers	453	\$7,493,499	\$2,521,970	\$4,971,529	49.6	13
Florists	4531	\$287,780	\$355,274	-\$67,494	-10.5	3
Office Supplies, Stationery & Gift Stores	4532	\$1,738,740	\$662,797	\$1,075,943	44.8	3
Used Merchandise Stores	4533	\$802,398	\$737,762	\$64,636	4.2	4
Other Miscellaneous Store Retailers	4539	\$4,664,581	\$766,137	\$3,898,444	71.8	3
Nonstore Retailers	454	\$5,872,144	\$0	\$5,872,144	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$5,235,469	\$0	\$5,235,469	100.0	0
Vending Machine Operators	4542	\$95,823	\$0	\$95,823	100.0	0
Direct Selling Establishments	4543	\$540,852	\$0	\$540,852	100.0	0
Food Services & Drinking Places	722	\$22,428,979	\$31,358,103	-\$8,929,124	-16.6	64
Special Food Services	7223	\$431,381	\$0	\$431,381	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$459,100	\$219,672	\$239,428	35.3	1
Restaurants/Other Eating Places	7225	\$21,538,498	\$31,138,431	-\$9,599,933	-18.2	63

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Source: Esri and Infogroup. Esri 2019 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

APPENDIX - HOUSING DENSITY



1 Proposed Retail Site: Elm Ave & 5th Ave

2 Proposed Retail Site: Elm Ave & Phelps Ave

3 Proposed Retail Site: Jayne Ave Parcel

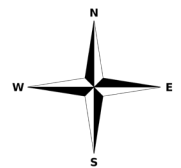
0-1,229 units

1,230-2,103 units

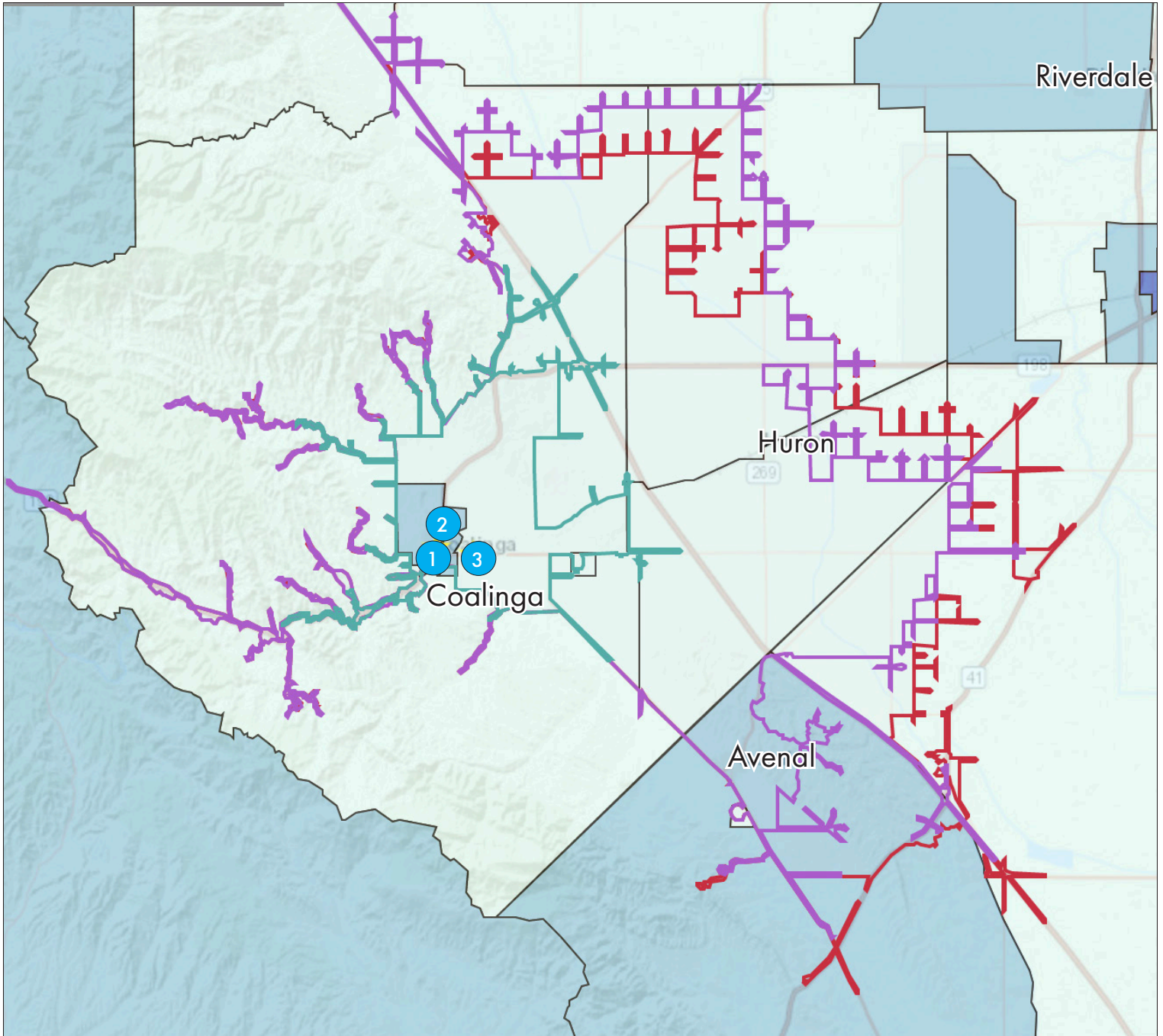
2,104-3,343 units

— Elm Ave. & 5th Ave. Trade Area — Elm Ave. & Phelps Ave. Trade Area

— Jayne Ave. Parcel Trade Area

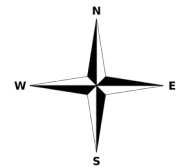


APPENDIX - RETAIL SALES POTENTIAL



- 1 Proposed Retail Site: Elm Ave & 5th Ave
- 2 Proposed Retail Site: Elm Ave & Phelps Ave
- 3 Proposed Retail Site: Jayne Ave Parcel

- \$0m - \$39.6m
- \$39.7m - \$75.7m
- \$75.8m - \$149.4m



- Elm Ave. & 5th Ave. Trade Area
- Elm Ave. & Phelps Ave. Trade Area
- Jayne Ave. Parcel Trade Area

Source: Esri, 2019



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About the Fresno County Economic Development Corporation

The Fresno County Economic Development Corporation is a private non-profit organization established to market Fresno County as the premier location for business prosperity. We facilitate site selection for new businesses, and assist in the retention and expansion of local businesses within Fresno County.

To learn more, visit www.fresnoedc.com