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# San Joaquin County Demographic and Employment Forecast

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*Prepared for:*



**SAN JOAQUIN**  
COUNCIL OF GOVERNMENTS  
CALIFORNIA

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## Purpose

San Joaquin Council of Governments (SJCOG) requires a long-range demographic and employment forecast to support the development of its Regional Transportation Plan (RTP), and Sustainable Communities Strategy (SCS). SJCOG updates these forecasts at approximately five-year intervals with the most recent update occurring in 2021. Cities and other agencies within the County also use the forecast to inform their own local planning efforts such as general plans and municipal service reviews. The forecast focuses on three areas: population, households, and employment. Population forecasts are broken down by age, race and ethnicity, and this detailed population forecast is used to generate the household projection.

At the county level, detailed population and employment forecasts are generated using REMI (Regional Economic Models, Inc.), a widely used regional modeling software model which captures the complex interdependence of demographic and economic factors. The county-level population forecasts are broken down by age, race, and ethnicity, and the employment forecasts are made at the industry level. The first section focuses on the county-level forecasts, including descriptions of the models used and forecasting assumptions. The second section details the results for sub-county areas and explains the process and adjustments used to allocate the county-level forecast to local areas.

## Section One: County Forecast

The economic and demographic forecasts were created using REMI. The REMI model is an econometric regional forecasting model. One of the strongest features of the REMI model is its integrated dynamic feedback between economic and demographic variables. For this forecasting exercise, the key feedback relationship is between local employment conditions and the migration of households in and out of the region. The REMI model is used by many metropolitan planning organizations for this purpose, most notably the Bay Area's Metropolitan Transportation Commission and Association of Bay Area Governments (MTC-ABAG), so using the REMI model aligns SJCOG's forecasting approach with other agencies in the region.

The REMI model uses historical data from several government sources to estimate economic and demographic forecast predictions at national and regional levels.<sup>1</sup> The model first makes projections at the national level and subsequently uses the national results to produce regional forecasts. REMI PI+ provides a default forecast, based on the current national and regional data available to conduct robust and dynamic regression estimators. While REMI provides an initial baseline forecast, another strength of the model is the ability of users to update and adjust the forecast and see the effect of alternative future scenarios. As described below, we incorporate

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<sup>1</sup> REMI is primarily based on data released by key federal statistical agencies, the Bureau of Economic Analysis (BEA), Bureau of Labor Statistics (BLS), and the U.S. Census Bureau (Census). For a detailed description of all the historical data used in the REMI model, see "REMI PI+ v3.2 Major Economic Data Sources." [https://www.remi.com/wp-content/uploads/2024/08/Model-Overview-v3\\_2.pdf](https://www.remi.com/wp-content/uploads/2024/08/Model-Overview-v3_2.pdf).

several sources of recent data and make additional adjustments based on knowledge of the local economy to capture trends and future developments.

The forecast presented in this report utilizes REMI PI+ v3.2.0, which was released in May 2024. It is a 27-region, 70-industry model of the U.S. and California economy in which San Joaquin County is defined as a unique region in California. The historical data is current through 2022, the latest year for which Bureau of Economic Analysis (BEA) personal income and other key economic data is available, and the model forecast period runs from 2025 to 2050. The REMI model allows for users to update and benchmark the model to 2023 and 2024 data when available, as well as to customize the forecast to include known future events and user judgement about local conditions.

The rest of this section is organized as follows. First, a review of the baseline REMI forecast results is presented to establish the model's initial predictions. Next, a list of updates and adjustments made to the model to more accurately project San Joaquin County demographic and employment profile into the future are detailed. The sections that follow present and discuss the results of the updated population forecast, and then use the population forecast to generate a projection of households and housing needs to accommodate the household growth. The last part of this section presents the updated employment by industry forecast for the county.

### 1.1 – REMI Baseline Forecast

The REMI model is delivered with an initial forecast for San Joaquin County based on the model's analysis of historical data through 2022 and an assumed long-range U.S. macroeconomic forecast. This is sometimes referred to as the “out of the box” or default REMI forecast, but we use the term REMI baseline forecast in this report. Examining the results of the baseline forecast gives a point of comparison for adjustments and allows us to understand some of the important drivers in the REMI model for San Joaquin County before we add updated data and the impact of some significant projects and plans expected in the near future.

As shown in Figure 1, the baseline forecast for San Joaquin County in the REMI model shows consistent employment growth throughout the forecast horizon. Annual growth of 0.6% predominates between 2025 and 2050. The REMI model's optimism stems from San Joaquin County's heavy dependence on industries, such as transportation and warehousing, that recently experienced significant employment growth. In the REMI model, migration of households in and out of counties is highly sensitive to local job opportunities. Thus, over time, the model also predicts employment growth in San Joaquin will also lead to an increase in these economic migrants to San Joaquin County, resulting in higher population growth.

Figure 1 – REMI Baseline Employment Forecast for San Joaquin County

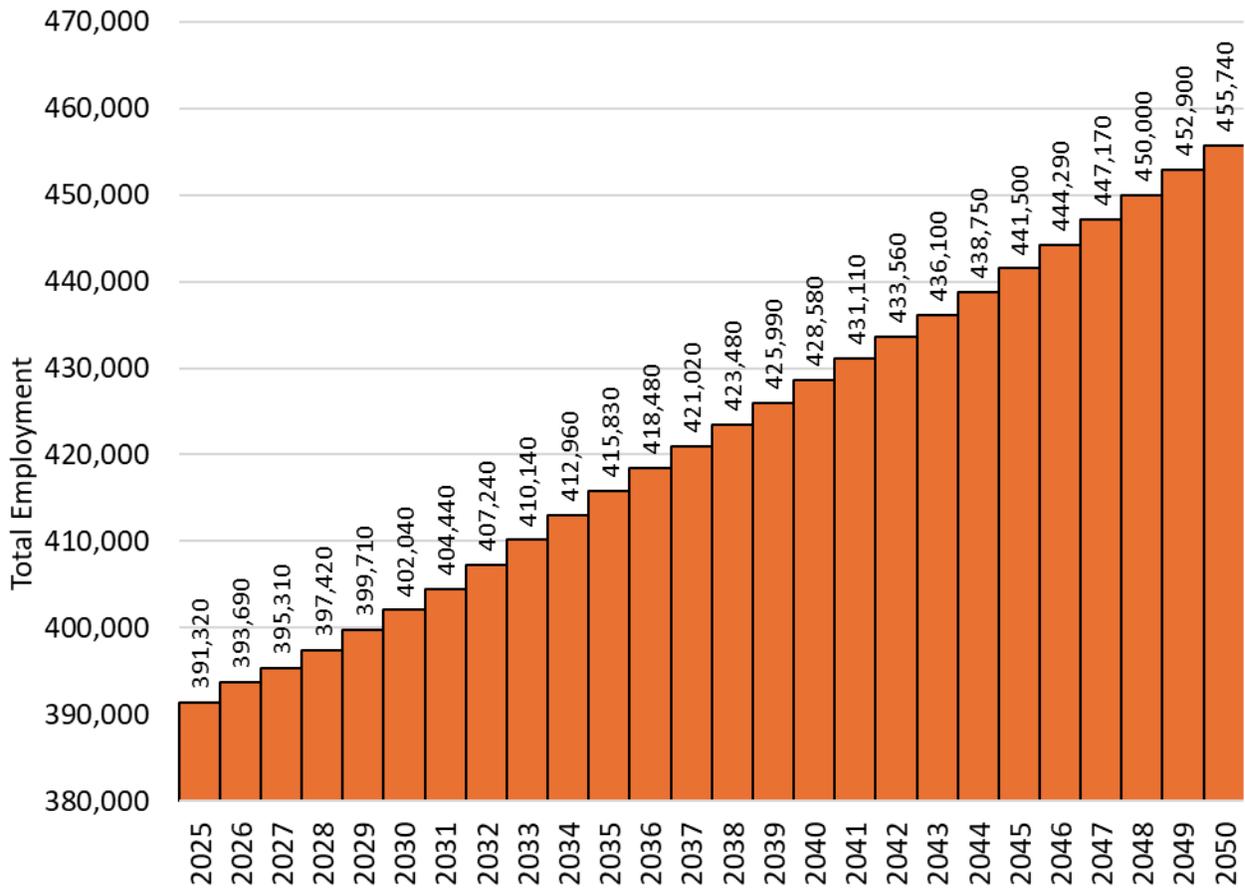
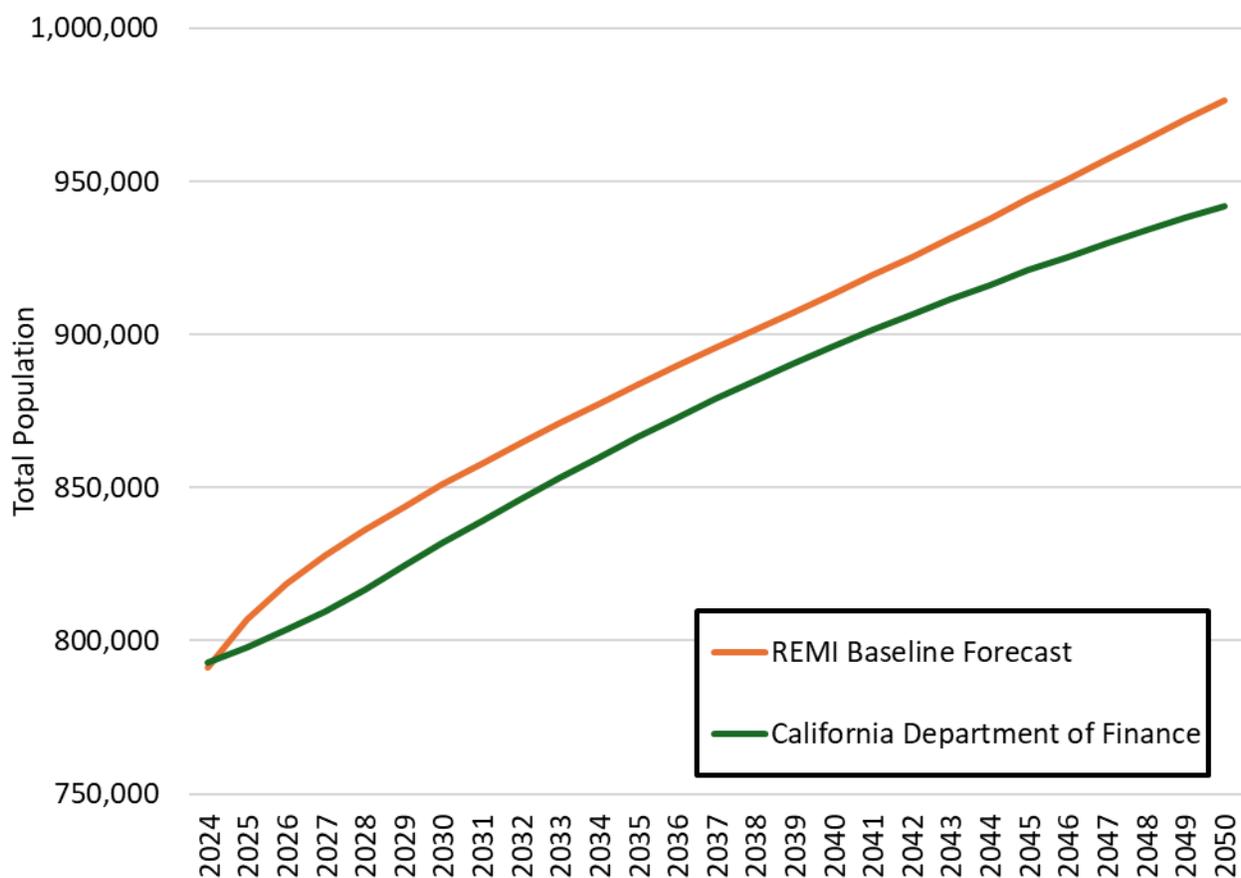


Figure 2 shows the REMI baseline population forecast for San Joaquin County, and to provide perspective it also shows the latest population forecast from the California Department of Finance (DOF).<sup>2</sup> Following the pattern seen in the REMI baseline employment forecast, the REMI baseline population forecast shows relatively robust population growth throughout the forecast horizon. As a result, San Joaquin County’s population growth is projected to be higher than the DOF forecast. In the following sections, we explain how we update the population forecast to incorporate the most recent data and assumptions about the longer-term employment dynamic. Again, as we update employment forecasts, those impacts carry through to the population forecast through changes in migration. Another source of updates to the baseline population forecast comes from adjustments in “amenity value,” which affects the county’s population by reflecting its comparative inter-regional attractiveness that results in more economic migrants entering the region annually. In the next section, we describe a series of adjustments that we have made to REMI model based on more current data, local experience, and knowledge of upcoming development plans.

<sup>2</sup> The California DOF forecast shown here was released in March 2024, known as Vintage 2023.

Figure 2 – REMI Baseline and CA DOF Population Forecasts 2024-2050



### 1.2 – Updates and Adjustments to the REMI Baseline Model

To generate the final county-wide forecast, a series of data updates and adjustments, identified below, were made to the REMI baseline model. After the data adjustments described below were made, the REMI model was employed to generate a new solution to account for all the linkages and feedback effects among the variables within the model. The first adjustments were updates to employment and population data to reflect the latest available local data. Finally, we made some adjustments to account for the county’s amenity value as a result of inter-regional and broader remote work considerations.

This section describes a series of updates and adjustments made to the REMI baseline model. These fall into four general categories: COVID-19 adjustments to the macroeconomic forecast, updating 2019 employment data to match recent data releases, local employment forecast to account for the pandemic-induced recession that began in March 2020, and adjustments to account for several large projects under development in San Joaquin County.

### *Employment Data Update*

Data from the Bureau of Labor Statistics (BLS) was used to update employment levels for each industry to their 2023 annual value. REMI uses the Bureau of Economic Analysis (BEA) definition of employment, which includes both employees and the self-employed (i.e., 1099), whereas BLS data sources focus on payroll (i.e., W-2) jobs only. Thus, the BLS data could not be directly entered into REMI, but we adjusted the percent change in employment between 2022 and 2023 for each industry in REMI to match the percent change in industry employment from the BLS data. We utilized Quarterly Census of Employment and Wages (QCEW) data to make the 2023 update a highly accurate data set based on tax filings.

### *Population Data Update*

Like many areas in California, San Joaquin County has experienced a slowing of population growth in recent years. According to BEA's county population estimates, annual average population growth (2020-2023) was 0.9% in the 2020s. That contrasts with annual average population growth of 1.3% in the 2010s, 2.1% in the 2000s, and 1.7% in the 1990s. The U.S. Census Bureau's midyear population estimates serve as the basis for the BEA estimates. However, the BEA has produced intercensal annual county population statistics for 2010 to 2019, aligned with the Census Bureau's decennial counts from 2010 and 2020. The BEA developed these intercensal statistics because the necessary data was not available when the Census Bureau released county population figures for 2020 to 2023, which are derived from the 2020 decennial counts. To generate these intercensal figures, BEA employed a modified version of the Census Bureau's Das Gupta method,<sup>3</sup> adjusted to account for the extra day in a leap year. Thus, using this BEA data to update San Joaquin County's 2022 and 2023 population estimates led to a reduction in the county's population growth compared to the Baseline Model.

### *Amenity Value Adjustment*

Even though moderated by recent updated employment and population data, strong pre-pandemic job and population growth rates result in San Joaquin County having an unrealistically enhanced level of attractiveness and investment potential that results in enhanced effects on economic migration to the region. In the REMI model, these influences are reflected through a variable called amenity value. Therefore, we adjusted the county's amenity value to account for this recency bias. This reduction slows migration to more realistic contemporary levels and smooths out the path of migration over time – reducing it in the medium-term but paralleling longer-term dynamics as shown previously in Figure 2.

## 1.3 – Updated Population Forecast

After making the adjustments described in section 1.2, the REMI model was re-run to generate an updated forecast. Figure 3 shows this REMI Adjusted Forecast compared to the REMI Baseline Forecast and the California Department of Finance (DOF) forecast for San Joaquin

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<sup>3</sup> For details on the U.S. Census Bureau Das Gupta estimation method, see <https://www2.census.gov/programs-surveys/popest/technical-documentation/methodology/intercensal/2000-2010-intercensal-estimates-methodology.pdf>.

County released in 2024.<sup>4</sup> The updated forecast (REMI Adjusted) is slightly lower than the REMI Baseline by the late 2020s, but over time tracks closer to the DOF forecast than the REMI Baseline. As discussed in the previous section, the moderate reduction in population growth is due to our adjustments to the regional amenity variable as well as updates to population and employment values. In the long-run, the adjustments we have made result in projected county-wide total population levels between the REMI Baseline and the CA DOF forecasts.

Figure 3 – Population Forecast Comparison: CA DOF, REMI Adjusted & Baseline Model

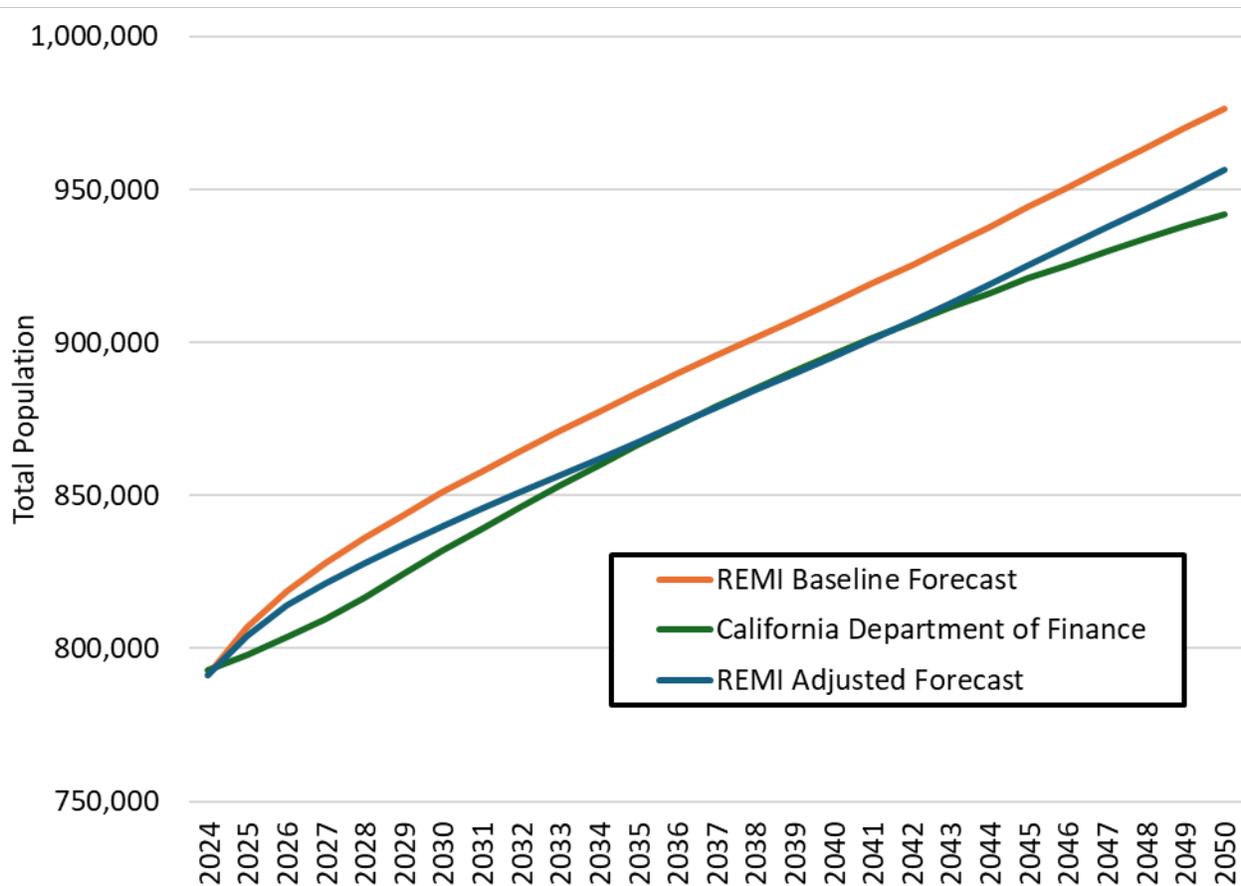


Table 1 shows the detailed total of San Joaquin County population in the updated forecast for each year through 2050. The forecast shows the remaining years of the 2020s will be peak years for San Joaquin County population growth with total county population growth of about 8,500 per year, around 1.1% annually. This is a slight increase over the 0.9% annual average population growth experienced from 2020 to 2023. After 2029, population growth is forecast to slowly decline to 0.7% annually by where it will remain for the rest of the forecast. San Joaquin County’s population is projected to exceed 950,000 in 2049.

<sup>4</sup> California Department of Finance Vintage 2023 population forecast, Table P-2A, released March 8, 2024. Available at <https://www.dof.ca.gov/forecasting/demographics/Projections/>.

Table 1 – San Joaquin County Population, Updated Forecast.

Year	Total Population	Annual Change	Annual % Change
2025	804,252	13,074	1.7%
2026	813,954	9,702	1.2%
2027	821,035	7,082	0.9%
2028	827,671	6,635	0.8%
2029	833,916	6,245	0.8%
2030	839,888	5,972	0.7%
2031	845,607	5,720	0.7%
2032	851,279	5,671	0.7%
2033	856,786	5,508	0.6%
2034	862,143	5,356	0.6%
2035	867,518	5,375	0.6%
2036	873,226	5,709	0.7%
2037	878,799	5,573	0.6%
2038	884,301	5,502	0.6%
2039	889,854	5,553	0.6%
2040	895,516	5,662	0.6%
2041	901,263	5,747	0.6%
2042	907,063	5,800	0.6%
2043	912,975	5,912	0.7%
2044	919,039	6,065	0.7%
2045	925,241	6,201	0.7%
2046	931,509	6,269	0.7%
2047	937,611	6,101	0.7%
2048	943,774	6,163	0.7%
2049	950,019	6,245	0.7%
2050	956,344	6,325	0.7%

Tables 2 and 3 break down the updated population forecast by race, ethnicity and age. Table 2 illustrates that the Hispanic population exceeds half of total San Joaquin County population by 2050, and is projected to grow faster than any other racial or ethnic group from about 350,000 in 2025 to 480,000 by 2050. The White Non-Hispanic population is projected to slowly decline from 211,000 in 2025 to about 180,000 in 2050. The Black Non-Hispanic population is projected to grow slowly from 56,000 in 2025 to 62,000 in 2050, while the Other Non-Hispanic<sup>5</sup> category will grow from about 185,000 in 2025 to nearly 232,000 in 2050.

Table 3 shows how San Joaquin County’s population will grow older over time. The 65+ age range increases by 65% between 2025 and 2050, from 115,000 in 2025 to 191,000 in 2050. In

<sup>5</sup> The REMI model has only 4 groups for race and ethnicity. The Other category is primarily Asian but includes all non-Hispanic individuals who are not identified as Black or White.

contrast, the under 25 population is projected to decline by 4% between 2025 and 2050, from 282,000 in 2025 to 272,000 in 2050. Within that population, the young adult population (15 to 24 years of age) will contract from 120,000 in 2025 to 108,000 in 2050, a 10% decline. The working age population (25 to 64 years of age) will grow from 407,000 in 2025 to 494,000 in 2050.

Table 2 – San Joaquin County Population Forecast - Race Breakdown

	Hispanic	White-non-Hispanic	Black-non-Hispanic	Other-non-Hispanic	All Races
<b>2025</b>	353,232	210,530	55,684	184,806	<b>804,252</b>
<b>2030</b>	380,324	206,636	57,275	195,653	<b>839,888</b>
<b>2035</b>	405,107	200,140	58,312	203,959	<b>867,518</b>
<b>2040</b>	430,551	193,162	59,296	212,508	<b>895,516</b>
<b>2045</b>	456,465	186,467	60,378	221,930	<b>925,241</b>
<b>2050</b>	482,322	180,406	61,598	232,019	<b>956,344</b>
<b>Change 2025-2050</b>	<b>129,090</b>	<b>-30,125</b>	<b>5,914</b>	<b>47,212</b>	<b>152,092</b>
<b>% Change 2025-2050</b>	<b>37%</b>	<b>-14%</b>	<b>11%</b>	<b>26%</b>	<b>19%</b>

Table 3 – San Joaquin County Population Forecast – Age Breakdown

	Ages 0-14	Ages 15-24	Ages 25-64	Ages 65+	All Ages
<b>2025</b>	162,283	119,949	406,565	115,456	<b>804,252</b>
<b>2030</b>	155,971	121,471	427,006	135,439	<b>839,888</b>
<b>2035</b>	153,517	114,508	447,810	151,683	<b>867,518</b>
<b>2040</b>	156,152	107,554	467,457	164,353	<b>895,516</b>
<b>2045</b>	160,165	105,605	483,085	176,386	<b>925,241</b>
<b>2050</b>	163,447	108,322	493,611	190,963	<b>956,344</b>
<b>Change 2025-2050</b>	<b>1,164</b>	<b>-11,627</b>	<b>87,046</b>	<b>75,507</b>	<b>152,092</b>
<b>% Change 2025-2050</b>	<b>1%</b>	<b>-10%</b>	<b>21%</b>	<b>65%</b>	<b>19%</b>

#### 1.4 – Updated Household Forecast

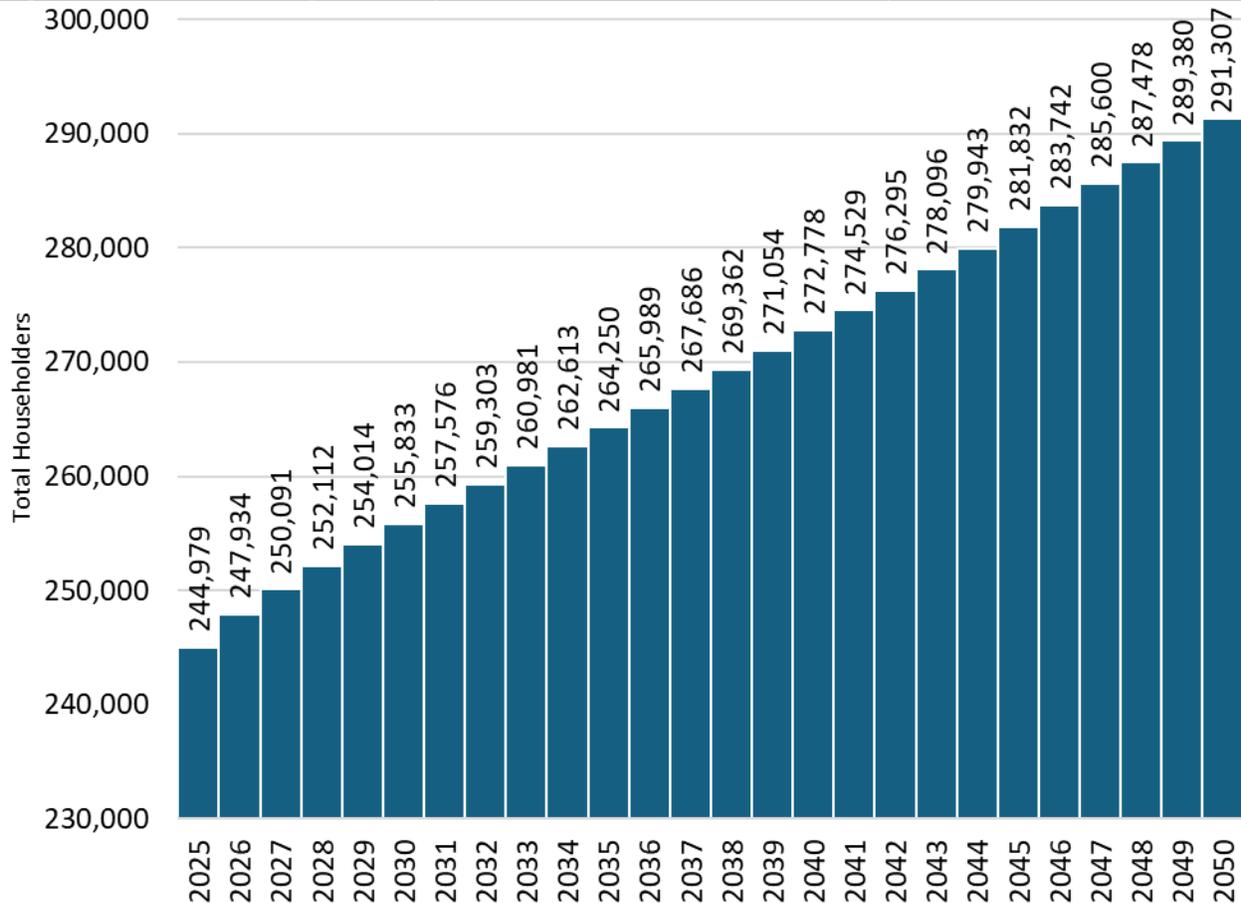
The Household forecast uses the population projections from the Adjusted REMI Model to calculate the number of householders in San Joaquin County. It is important to note that there is a distinction between a household and householder, though their numerical values are equivalent. The term householder refers to the person, or one of the people, in whose name the home is owned, being bought, or rented. Whereas a household consists of all the people who occupy a housing unit as their usual place of residence. Following standard practice, we forecast the number of households by projecting the number of householders.

The number of householders is estimated using the U.S. Census Bureau’s American Community Survey, 5-Year Estimates, to obtain the householders demographic characteristics: race, age cohorts, and sex. Using this data, we calculate the probability that an individual of a particular sex, race and age is likely to be a householder, and the corresponding probabilities are applied to

the demographic population estimates in the updated population forecast described in the previous section. The householder probabilities were estimated using the average values from the 2022 five-year Census ACS data. This data is available as far back as the 2006-2010 ACS, and the trend towards lower rates of household formation, particularly among the 25-34-year age group, is clear. Thus, by only using the most recent data for householder rates, we are assuming the trend seen in the more recent data, with lower levels of household formation among young adults, will continue into the future. The householder estimates are equivalent to the number of occupied housing units (or households).

Figure 4 shows the household forecast for San Joaquin County. Overall, households grow at a similar rate as population with slight differences as the demographic composition of the population changes over time. The County is estimated to have about 245,000 households in 2025, which grows to over 290,000 households by 2050.

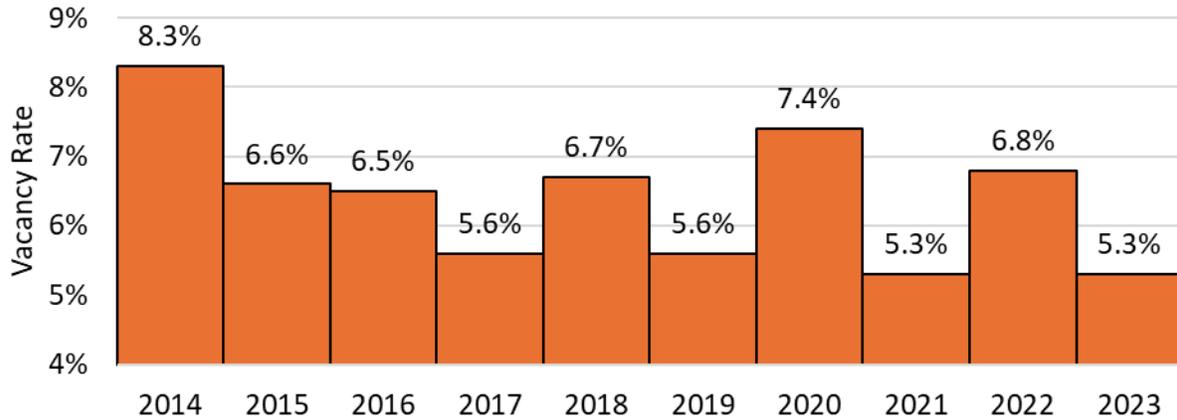
Figure 4 – CBPR San Joaquin County Householder Forecast – based on Adjusted Forecast



The household forecast is closely related to San Joaquin County’s total housing need, defined as the number of housing units required to house the County’s projected households. Over a decade ago, following the construction boom driven by the housing bubble and during the height of the foreclosure crisis, San Joaquin County faced an oversupply of housing units and historically high vacancy rates. Those excess housing units have largely been absorbed by the market and the county-wide vacancy rate has subsequently declined. This is illustrated by Figure 5 which shows

the vacancy rate for San Joaquin County housing units based on One-Year Census American Community Survey from 2014 to 2024. Housing unit vacancies were over 8% in 2014 but has declined in subsequent years as the growth in new households has exceeded construction of new housing units and in 2023 the vacancy rate was down to 5.3%.

Figure 5 – San Joaquin County Housing Vacancy Rate



The need for future housing production in the County can be derived from the household forecast. Planners often use a 5% vacancy rate for the amount of vacancy that a typical housing market without many second homes requires to accommodate turnover and renovation of existing units. Tourist areas and some urban centers will often have higher vacancy rates, because they are popular locations for second homes that have only occasional use. That is not the case for San Joaquin County, so we estimate future housing needs at the level of new units required to accommodate projected households and maintain a 5% market vacancy rate. As described in the previous paragraph, San Joaquin County is currently near a 5% vacancy rate. Thus, our estimate of future housing need does not account for any excess housing that the market needs to absorb, or any catch-up production if the market is currently in shortage. We simply add a 5% margin to the number of projected new households in each year to estimate the annual housing need at the County level.

Figures 6 shows the estimated annual housing need for San Joaquin County, and Figure 7 shows the cumulative amount of housing units needed from 2025 forward to 2050. Housing needs are greatest in the immediate future with over 4,000 units needed in 2025. The annual housing need declines to about 1,700 units by 2033 and remains in a range between 1,700 and 2,000 units through the rest of the forecast to 2050. The cumulative housing need forecast provides another useful perspective. As shown in Figure 7, we estimate San Joaquin County needs about 27,000 units over the next decade. Recent housing production trends suggest that San Joaquin County is unlikely to produce 4,000 units needed at the beginning of the forecast. The forecast of cumulative needs provides a way to track if San Joaquin County is keeping up with its goals over time.

Figure 6 – San Joaquin County Annual Housing Needs Forecast

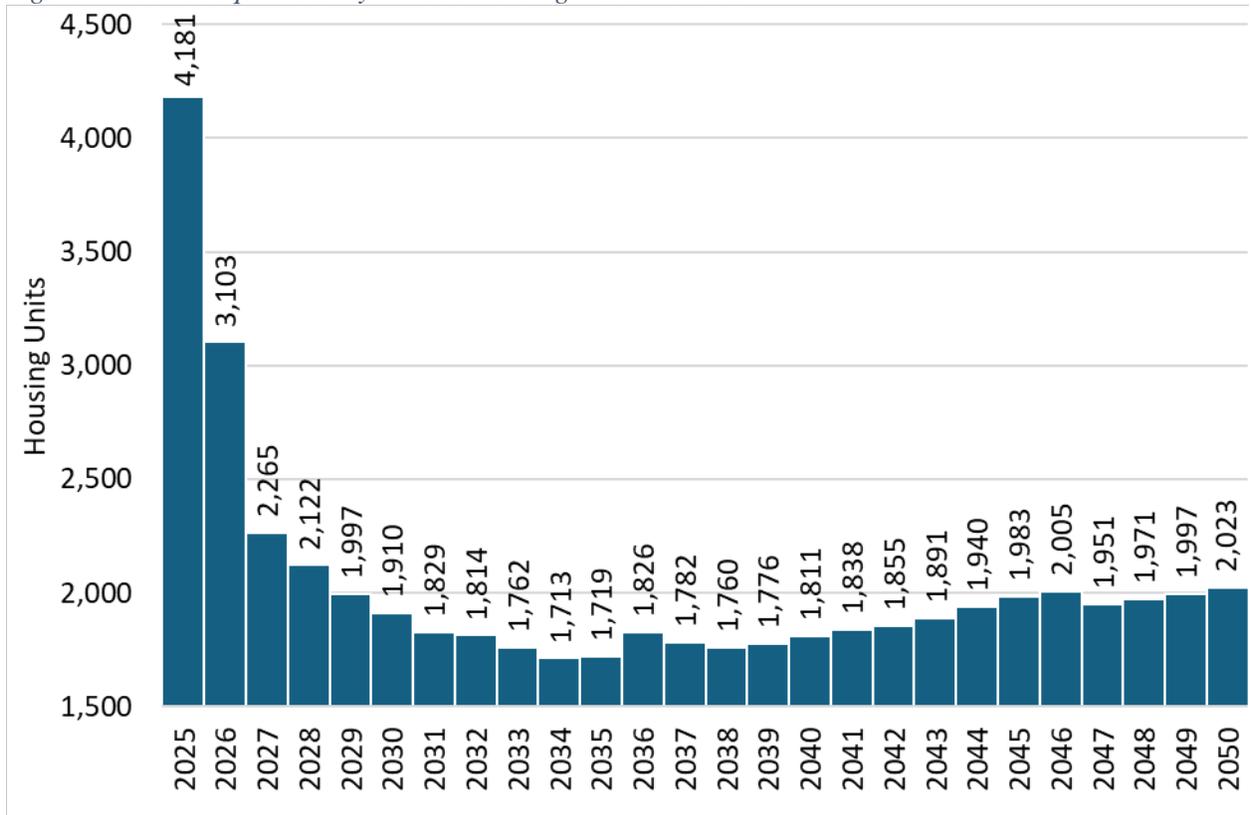
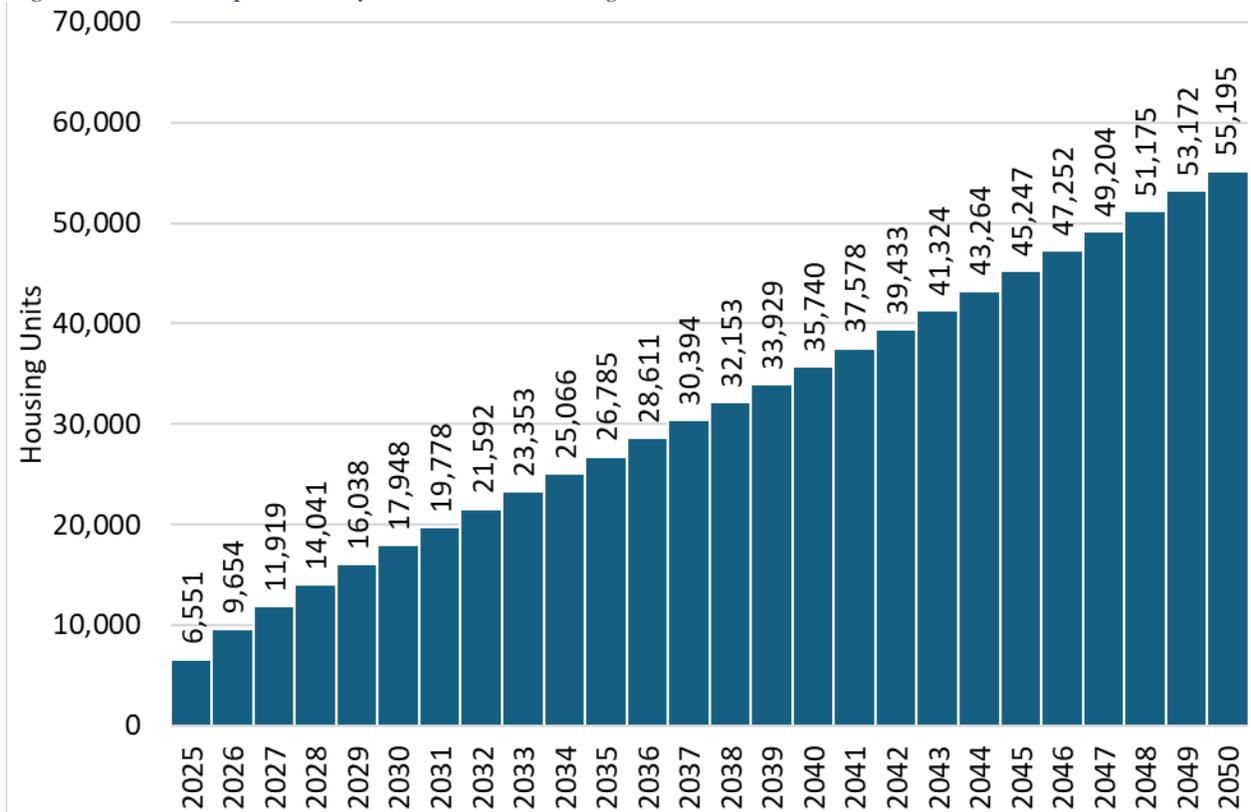


Figure 7 – San Joaquin County Cumulative Housing Needs Forecast



### 1.5 – Updated Employment Forecast

Figure 8 shows the Adjusted Forecast for employment in San Joaquin County. Compared to the REMI Baseline Model, this forecast is slightly more pessimistic regarding the county’s future employment growth with annual projected employment lower by between 3,960 and 4,970. Despite this, total employment levels are forecast to grow by 0.7% through the first half of the 2030s and throughout the rest of the forecast horizon average about 0.6% annually.

Figure 8 – San Joaquin County Updated Employment Forecast

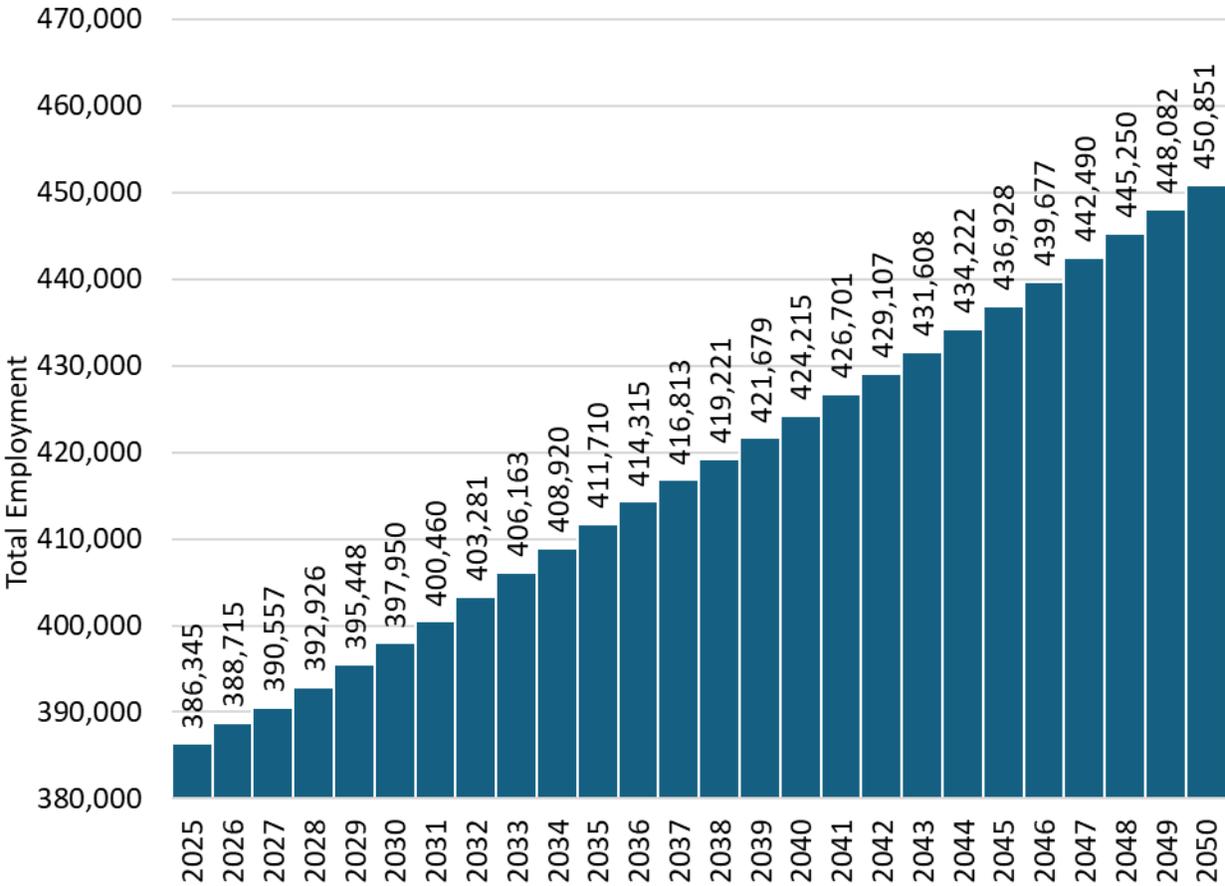


Table 4 shows the employment forecast by industry. Recent growth in Transportation and Warehousing is projected to continue with a further 20,000 jobs between 2025 and 2050. Despite this increase of 32.5%, our adjusted employment forecast is well below the 69.2% increase the sector experienced between 2015 and 2020 when the e-commerce boom led by Amazon increased employment from 26,000 to 44,000 jobs. Healthcare is another industry with significant employment growth in the forecast, adding about 14,000 jobs over the next 25 years. Most other industries are projecting very modest growth, including Construction with employment expected to increase by about 4,800 jobs over the next 25 years.

Table 4 – Adjusted Forecast: Employment by Industry 2015-2050

Industry	2025	2030	2035	2040	2045	2050	Change 2025-2050	% Change 2025-2050
Agriculture	17,558	17,417	17,370	17,371	17,302	17,229	-329	-1.9%
Mining	204	203	202	197	193	189	-15	-7.2%
Utilities	1,772	1,776	1,801	1,829	1,855	1,884	113	6.4%
Construction	17,591	19,066	20,600	21,373	21,954	22,422	4,831	27.5%
Manufacturing	24,368	24,159	24,266	24,598	24,986	25,444	1,075	4.4%
Wholesale trade	14,166	14,091	13,957	13,824	13,694	13,586	-580	-4.1%
Retail trade	34,293	33,974	33,601	32,884	32,135	31,454	-2,839	-8.3%
Transportation and warehousing	62,863	66,474	70,505	74,407	78,573	83,290	20,427	32.5%
Information	1,819	1,802	1,791	1,772	1,753	1,737	-82	-4.5%
Finance and insurance	13,734	14,225	14,779	15,337	15,876	16,437	2,703	19.7%
Real estate and rental and leasing	17,800	18,491	19,311	20,129	20,955	21,835	4,036	22.7%
Professional Services	13,313	13,880	14,363	14,657	14,885	15,103	1,789	13.4%
Management of companies & enterprises	2,331	2,450	2,573	2,697	2,819	2,949	618	26.5%
Business Services	21,580	22,123	22,813	23,471	24,142	24,880	3,300	15.3%
Educational services; private	6,883	7,083	7,302	7,504	7,702	7,926	1,042	15.1%
Health care and social assistance	41,180	43,839	46,813	49,506	52,281	55,232	14,052	34.1%
Arts, entertainment, and recreation	4,709	4,868	5,119	5,359	5,585	5,795	1,086	23.1%
Accommodation and food services	24,730	25,369	26,297	27,372	28,537	29,834	5,104	20.6%
Other services	20,208	20,733	21,597	22,417	23,293	24,221	4,013	19.9%
Government	45,244	45,927	46,650	47,512	48,408	49,406	4,162	9.2%
<b>Total</b>	<b>386,345</b>	<b>397,950</b>	<b>411,710</b>	<b>424,215</b>	<b>436,928</b>	<b>450,851</b>	<b>64,506</b>	<b>16.7%</b>

## Section Two: Local Area Forecast

In this section, the county-level forecast for population, householders and employment is presented for the local geographies of cities and unincorporated areas. The REMI Adjusted forecasts in Section One are presented at the county level and this is the smallest geography available for the REMI model. Therefore, we break down the county-level forecast to local areas using trend growth in available local data, with adjustments for consideration of local market factors and plans after consultation with local officials. More details on this process and the results are in the sub-sections that follow.

In Section 2.1, the definitions for the local and sub-county areas are presented. Section 2.2 describes the data and methodology used to break out the county-level forecast into the local areas. Section 2.3 describes the results for population, householders, and employment. Detailed tables of employment by industry for each of the local areas are included in Appendix A.

### 2.1 – Geography

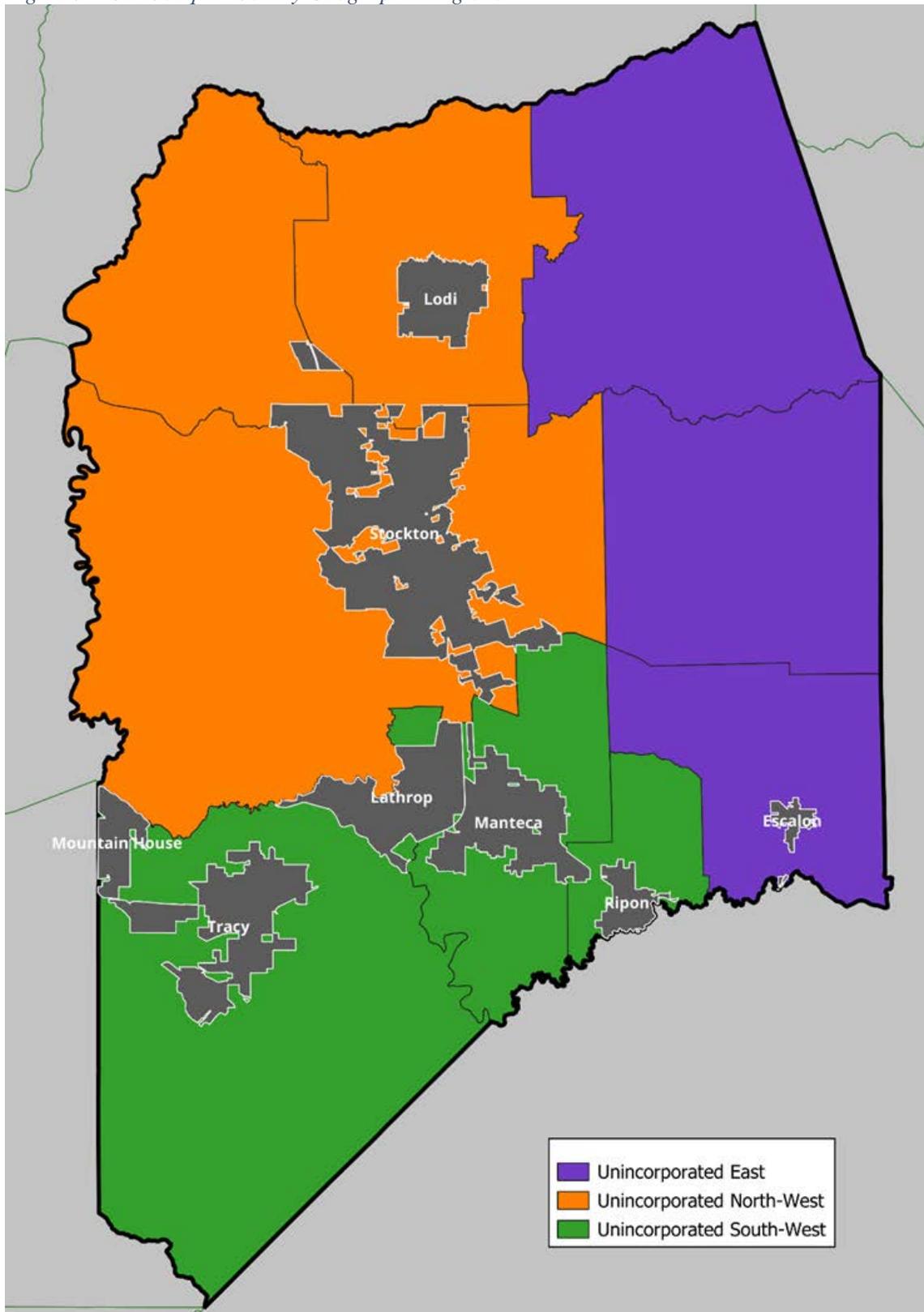
The forecast was broken down into 11 local areas, including the eight incorporated cities in San Joaquin County: Escalon, Lathrop, Lodi, Manteca, Mountain House,<sup>6</sup> Ripon, Stockton and Tracy. For the other four local areas, the unincorporated area of San Joaquin County was broken down into three sub-areas using U.S. Census County Subdivisions (CCDs). Given the available data and geography of San Joaquin County, this approach was determined to be best of the feasible options for forecasting unincorporated areas.

The U.S. Census Bureau (Census) breaks the entire county into nine CCDs. As shown in Figure 9, we aggregated these into three regions: East, Northwest, and Southwest. The East region consists of the Escalon, Linden-Farmington, and Lockeford CCDs; the Northwest region consists of the Lodi, Stockton, and Thornton CCDs; and the Southwest region consists of the Manteca, Ripon, and Tracy CCDs. To create data for the unincorporated area within these three regions, we subtracted the data values for incorporated cities from the County Subdivision totals in each of the three regions. This results in the three unincorporated zones illustrated in Figure 9: Unincorporated East, Unincorporated Northwest, and Unincorporated Southwest. In addition to representing different regional characteristics, this specific configuration was necessary to avoid data problems that arise when the boundaries of incorporated cities overlap the boundaries of the CCDs, a significant problem for the City of Lathrop because it includes portions of both the Manteca and Tracy CCDs both of which are consolidated into the Unincorporated Southwest region.

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<sup>6</sup> Owing to the recent incorporation of Mountain House on July 1, 2024, historic data for the jurisdiction is not available. Therefore, the Mountain House Census Designated Place (CDP) was used throughout the sub-county forecasting process as a proxy for the city.

Figure 9 – San Joaquin County Geographic Regions



## 2.2 – Local Area Forecast Data and Methodology

Forecasts for the local areas followed a two-step process. In the first step, we gathered the best available local level data on population, households, and employment and used a trend analysis to forecast each local area’s share of the County total in future years. This generated an initial forecast for each variable that was shared with local jurisdictions. In the second step, we consulted with local officials for feedback on the initial forecasts and discussed recent developments, future plans, and local market trends.

### *Local Area Population and Households: Methodology for initial forecast*

The county-level population forecasts described in Section One above, along with population data from the 2010 and 2020 Decennial Census, were utilized to create the local projections.<sup>7</sup> The local forecast used this Census data to estimate growth rate for each area. The 2010 to 2020 growth rate was then multiplied by the 2023 population at the county level to distribute each area’s share of growth. In a final step, we ensured the sum of all local area populations equals the total county population. This was done by subtracting the sum of all local areas from the county forecast population, with any remainder redistributed to localities based on their share of county population in that year.

The household forecast was estimated using the county-level forecast as well as data from the Census. The Census data used was the population in households (Table DP02), total households (Table S1101), and the average household size (Table DP02) from the 2018-2022 ACS. As the entire population does not live in a home, we took the percent of people living in a home for each area and applied this percent to the projected population in the area. This estimate of the number of people living in a home for each area was divided by the average household size. The difference between local area totals and the county forecast was calculated, with any remainder distributed to local areas based on their share of the county total in that year.

### *Local Area Employment: Methodology for initial forecast*

The employment forecast was calculated by using Census Longitudinal Origin-Destination Employment Statistics (LODES) employment data. The employment forecasts were calculated for each geographic area within San Joaquin County by taking the annual growth rates from 2013 to 2021 (most current year available) LODES data. The average growth rate from 2013 to 2018 for each industry was calculated for each area but, due to volatility in the local data, we restricted the observations to exclude years with abnormally high and low rates by including only growth rates that are within one standard deviation of the unrestricted 2013 to 2021 growth average in each area. This process then used the county-level employment by industry forecast (presented in Section One above) to obtain the local forecast. This was done by taking the annual change in county-level employment by industry, applying the local restricted average growth rates by industry for all local areas, and then multiplying the individual rates by the sum of the annual change in employment by industry at the county level and the previous year's employment numbers.

$$Employment_{ijt+1} = Employment_{ijt} + \overline{Restricted\ Growth\ Share_{ij}} / Employment_{ijt} - Employment_{ijt-1}$$

Where:

$$Employment_{ijt} = \text{Employment in Geography}(j), \text{ for Industry } (i), \text{ at Year } (t)$$

$$Employment_{jt} = \text{Employment in San Joaquin County } (I) \text{ for Industry } (j) \text{ at Year } (t)$$

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<sup>7</sup> Data from the 2010 Decennial Census is taken from Summary File 1, Table P1 while data from the 2020 Decennial Census is taken from Demographic Profile, Table DP1.

$$\overline{\text{Restricted Growth Share}} = \frac{1}{k} \sum_{k=2050}^{2023} (\text{Employment Growth Rate}_{ij}) \text{ if Annual Growth Rate}_t \pm \text{SD}_{ij} \text{ of Unrestricted Growth Share}$$

Where: t = 2023-2050.

Due to rounding, the local areas do not sum to the county totals. To account for this, the sum of the local area's employment by industry was subtracted from the county-level figure and any remainders are distributed to local areas proportionally based on their industry share for that particular year.

#### *Local Area Feedback Meetings and Forecast Adjustments*

After the initial step of data gathering and generation of the initial forecast was completed, the preliminary results were distributed to local planning officials, and they were consulted in the second step to obtain local agency feedback and additional information on recent developments, future plans, and local market trends. The forecast was presented in a series of nine meetings beginning October 28th and concluding November 15<sup>th</sup>. These meetings occurred with key staff from all eight of the county's incorporated cities and San Joaquin County for the unincorporated portions.

On the topic of the geographic pattern of employment growth, there was general agreement around the county-wide adjustments made to the model and the distribution of employment activity across the county. In terms of the geography of population growth, there was also general agreement around the initial sub-county allocations. However, based on the conversations with the jurisdictions, additional attention to acreage available for residential development and growth dynamics were highlighted as an important consideration. Given the model's focus on previous rates, differences between the available acreage for future development and the initial sub-county population forecasts were reviewed as well as recent population estimates from the CA DOF.

*Table 5 – Local Area Population Adjustments*

City	Initial 2025-2050 Population Growth Rate	Adjusted 2025-2050 Population Growth Rate
Escalon City	16.5%	16.5%
Lathrop City	27.3%	90.9%
Lodi City	17.0%	17.0%
Manteca City	20.8%	20.8%
Mountain House CDP	40.9%	62.0%
Ripon City	18.1%	18.1%
Stockton City	17.7%	8.8%
Tracy City	18.2%	18.2%
Unincorporated East	15.7%	12.4%
Unincorporated Northwest	16.5%	13.1%
Unincorporated Southwest	17.6%	14.2%
(Sub-Total Unincorporated)	16.6%	13.2%
County Total	18.9%	18.9%

This review resulted in an upward adjustment in the growth rates of the cities of Lathrop and Mountain House as well as a reduction in the City of Stockton’s growth rate. Given the county-level forecast functioning as the control for the sub-county entities, meaning the sum of the sub-county jurisdictions must equal the county total, the Unincorporated regions were given proportional reductions in their population growth. Table 6 summarizes the impact of these adjustments on the 2025 to 2050 population growth rates.

### 2.3 – Local Area Population Forecasts

Tables 6 to 12 summarize the results of the local forecasts by area. The appendix provides further details of the local employment forecast by industry.

As shown in Tables 6 and 7, Lathrop and Stockton together are projected to gain about 25,000 new residents over the next decade, and a total of nearly 63,000 new residents between 2025 and 2050. The southwestern portion of the county is forecast to remain a strong source of population growth with Lathrop, Mountain House, Manteca, and Tracy leading the county’s growth rates.

*Table 6 – Local Area Population Forecast*

<b>Location</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>
<b>Escalon City</b>	7,354	7,641	7,863	8,086	8,321	8,567
<b>Lathrop City</b>	37,881	44,766	51,652	58,537	65,423	72,308
<b>Lodi City</b>	67,476	70,184	72,271	74,377	76,601	78,918
<b>Manteca City</b>	92,541	97,026	100,511	104,048	107,808	111,748
<b>Mountain House CDP</b>	31,014	34,862	38,710	42,558	46,406	50,255
<b>Ripon City</b>	15,989	16,672	17,200	17,733	18,297	18,886
<b>Stockton City</b>	322,085	327,784	333,484	339,184	344,884	350,584
<b>Tracy City</b>	98,133	102,331	105,576	108,856	112,327	115,950
<b>Unincorporated East</b>	22,099	23,206	23,448	23,731	24,203	24,829
<b>Unincorporated Northwest</b>	84,293	88,650	89,678	90,870	92,793	95,306
<b>Unincorporated Southwest</b>	25,389	26,765	27,126	27,538	28,175	28,994
<i>(Sub-Total Unincorporated)</i>	<i><u>131,781</u></i>	<i><u>138,621</u></i>	<i><u>140,251</u></i>	<i><u>142,138</u></i>	<i><u>145,172</u></i>	<i><u>149,129</u></i>
<b>Total San Joaquin County</b>	<b><u>804,252</u></b>	<b><u>839,888</u></b>	<b><u>867,518</u></b>	<b><u>895,516</u></b>	<b><u>925,241</u></b>	<b><u>956,344</u></b>

Table 7 – Projected Population Change for San Joaquin County Local Areas

Location	2025-35 change	2025-35 % change	2025-50 change	2025-50 % change
Escalon City	509	6.9%	1,213	16.5%
Lathrop City	13,771	36.4%	34,428	90.9%
Lodi City	4,795	7.1%	11,442	17.0%
Manteca City	7,970	8.6%	19,207	20.8%
Mountain House CDP	7,696	24.8%	19,241	62.0%
Ripon City	1,211	7.6%	2,898	18.1%
Stockton City	11,400	3.5%	28,500	8.8%
Tracy City	7,443	7.6%	17,816	18.2%
Unincorporated East	1,349	6.1%	2,730	12.4%
Unincorporated Northwest	5,385	6.4%	11,013	13.1%
Unincorporated Southwest	1,737	6.8%	3,605	14.2%
<i>(Sub-Total Unincorporated)</i>	<u>8,471</u>	<u>6.4%</u>	<u>17,348</u>	<u>13.2%</u>
<b>Total San Joaquin County</b>	<b><u>63,266</u></b>	<b><u>7.9%</u></b>	<b><u>152,092</u></b>	<b><u>18.9%</u></b>

Tables 8 and 9 project the growth in households by local area. As expected, household growth parallels the findings for population growth with relatively minor difference with population dynamics because of demographic differences in the local areas. Lathrop and Stockton together are projected to add over 7,000 households over the next decade and 17,600 households through 2050. The southwest of the county is again projected to have the highest growth rates, with Lathrop, Mountain House, Manteca and Tracy experiencing the fastest rates of growth.

Table 8 – Local Area Householder Forecast

Location	2025	2030	2035	2040	2045	2050
Escalon City	2,557	2,657	2,735	2,814	2,897	2,983
Lathrop City	9,776	11,557	13,337	15,120	16,903	18,686
Lodi City	23,880	24,846	25,591	26,344	27,139	27,967
Manteca City	29,117	30,537	31,642	32,763	33,957	35,208
Mountain House CDP	8,229	9,253	10,277	11,301	12,327	13,352
Ripon City	5,379	5,610	5,789	5,971	6,162	6,363
Stockton City	96,692	98,435	100,172	101,908	103,648	105,390
Tracy City	28,682	29,918	30,875	31,842	32,866	33,935
Unincorporated East	7,605	8,032	8,173	8,327	8,542	8,808
Unincorporated Northwest	26,228	27,740	28,262	28,828	29,610	30,569
Unincorporated Southwest	6,835	7,247	7,397	7,559	7,779	8,047
<i>(Sub-Total Unincorporated)</i>	<u>40,668</u>	<u>43,019</u>	<u>43,831</u>	<u>44,714</u>	<u>45,932</u>	<u>47,424</u>
<b>Total San Joaquin County</b>	<b><u>244,979</u></b>	<b><u>255,833</u></b>	<b><u>264,250</u></b>	<b><u>272,778</u></b>	<b><u>281,832</u></b>	<b><u>291,307</u></b>

Table 9 – Projected Householder Change for San Joaquin County Local Areas

Location	2025-35 change	2025-35 % change	2025-50 change	2025-50 % change
Escalon City	178	7.0%	426	16.7%
Lathrop City	3,561	36.4%	8,910	91.1%
Lodi City	1,711	7.2%	4,087	17.1%
Manteca City	2,525	8.7%	6,091	20.9%
Mountain House CDP	2,048	24.9%	5,123	62.3%
Ripon City	410	7.6%	984	18.3%
Stockton City	3,480	3.6%	8,698	9.0%
Tracy City	2,193	7.6%	5,253	18.3%
Unincorporated East	568	7.5%	1,203	15.8%
Unincorporated Northwest	2,034	7.8%	4,341	16.6%
Unincorporated Southwest	562	8.2%	1,212	17.7%
<i>(Sub-Total Unincorporated)</i>	<u>3,163</u>	<u>7.8%</u>	<u>6,756</u>	<u>16.6%</u>
<b>Total San Joaquin County</b>	<b><u>19,271</u></b>	<b><u>7.9%</u></b>	<b><u>46,328</u></b>	<b><u>18.9%</u></b>

Tables 10 and 11 summarize projected employment growth. In the next decade the rate of employment growth is projected to exceed that of population and households. While slowing from recent rates, transportation and warehousing will contribute to Tracy having the highest employment growth rate. Stockton will add the most jobs in total with growth slightly above the county-wide rate. Together Stockton and Tracy will account for over three-fifths of job growth across the 2025-2050 forecast horizon.

Table 10 – San Joaquin County Employment Forecast – City Breakdown

Location	2025	2030	2035	2040	2045	2050
Escalon City	2,653	2,652	2,677	2,689	2,705	2,731
Lathrop City	16,045	16,649	17,356	18,030	18,714	19,437
Lodi City	35,247	36,163	37,263	38,221	39,168	40,183
Manteca City	26,372	27,363	28,611	29,791	31,045	32,478
Mountain House CDP	857	888	922	949	975	1,004
Ripon City	6,375	6,557	6,773	6,919	7,056	7,204
Stockton City	165,940	170,324	175,359	179,768	184,146	188,836
Tracy City	58,014	60,947	64,375	67,706	71,271	75,310
Unincorporated East	10,380	10,410	10,492	10,559	10,600	10,646
Unincorporated Northwest	37,757	38,638	39,760	40,732	41,671	42,655
Unincorporated Southwest	26,706	27,359	28,122	28,851	29,579	30,369
<i>(Sub-Total Unincorporated)</i>	<u>74,843</u>	<u>76,407</u>	<u>78,375</u>	<u>80,142</u>	<u>81,849</u>	<u>83,670</u>
<b>Total San Joaquin County</b>	<b><u>386,345</u></b>	<b><u>397,950</u></b>	<b><u>411,710</u></b>	<b><u>424,215</u></b>	<b><u>436,928</u></b>	<b><u>450,851</u></b>

Table 11 – Projected Employment Change for San Joaquin County Local Areas

Location	2025-35 change	2025-35 % change	2025-50 change	2025-50 % change
Escalon City	24	0.9%	77	2.9%
Lathrop City	1,311	8.2%	3,392	21.1%
Lodi City	2,016	5.7%	4,936	14.0%
Manteca City	2,239	8.5%	6,106	23.2%
Mountain House CDP	65	7.6%	146	17.1%
Ripon City	398	6.2%	829	13.0%
Stockton City	9,419	5.7%	22,896	13.8%
Tracy City	6,361	11.0%	17,296	29.8%
Unincorporated East	112	1.1%	266	2.6%
Unincorporated Northwest	2,004	5.3%	4,898	13.0%
Unincorporated Southwest	1,417	5.3%	3,663	13.7%
<i>(Sub-Total Unincorporated)</i>	<u>3,533</u>	<u>4.7%</u>	<u>8,828</u>	<u>11.8%</u>
<b>Total San Joaquin County</b>	<b><u>25,365</u></b>	<b><u>6.6%</u></b>	<b><u>64,506</u></b>	<b><u>16.7%</u></b>

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Table 12 – City Level Employment by Industry – Escalon

<b>Industry</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>
<b>Agriculture</b>	31	30	30	30	29	29
<b>Mining</b>	6	6	6	6	6	6
<b>Utilities</b>	0	0	0	0	0	0
<b>Construction</b>	198	218	240	251	259	266
<b>Manufacturing</b>	672	669	671	676	682	689
<b>Wholesale trade</b>	38	38	37	36	36	35
<b>Retail trade</b>	384	366	346	308	273	243
<b>Transportation and warehousing</b>	107	113	120	126	133	140
<b>Information</b>	4	4	4	4	4	4
<b>Finance and insurance</b>	93	97	101	104	108	112
<b>Real estate and rental and leasing</b>	52	54	57	60	62	65
<b>Professional, scientific, and technical services</b>	112	77	58	49	43	38
<b>Management of companies and enterprises</b>	13	13	14	15	16	17
<b>Business Support and Waste Management Services</b>	62	62	62	61	61	60
<b>Educational services; private</b>	96	99	101	103	106	108
<b>Health care and social assistance</b>	178	187	198	207	217	227
<b>Arts, entertainment, and recreation</b>	0	0	0	0	0	0
<b>Accommodation and food services</b>	231	236	244	254	264	275
<b>Other services (except public administration)</b>	132	134	138	141	145	148
<b>Government</b>	243	247	251	256	262	268
<b>Total</b>	2,653	2,652	2,677	2,689	2,705	2,731

Table 13 – City Level Employment by Industry – Lathrop

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	6	6	6	6	6	6
<b>Mining</b>	1	1	1	1	1	1
<b>Utilities</b>	1	1	1	1	1	2
<b>Construction</b>	1,266	1,366	1,470	1,521	1,560	1,591
<b>Manufacturing</b>	2,554	2,530	2,542	2,579	2,623	2,674
<b>Wholesale trade</b>	1,363	1,364	1,364	1,364	1,364	1,363
<b>Retail trade</b>	756	794	841	938	1,052	1,170
<b>Transportation and warehousing</b>	5,838	6,110	6,408	6,688	6,981	7,304
<b>Information</b>	0	0	0	0	0	0
<b>Finance and insurance</b>	171	179	188	198	207	217
<b>Real estate and rental and leasing</b>	256	268	282	296	310	325
<b>Professional, scientific, and technical services</b>	409	517	626	704	770	837
<b>Management of companies and enterprises</b>	0	0	0	0	0	0
<b>Business Support and Waste Management Services</b>	1,472	1,506	1,544	1,575	1,600	1,620
<b>Educational services; private</b>	108	109	109	110	111	112
<b>Health care and social assistance</b>	291	311	333	353	373	395
<b>Arts, entertainment, and recreation</b>	47	49	52	56	58	61
<b>Accommodation and food services</b>	601	614	633	655	679	705
<b>Other services (except public administration)</b>	425	438	461	482	505	529
<b>Government</b>	479	486	494	503	513	523
<b>Total</b>	16,045	16,649	17,356	18,030	18,714	19,437

Table 14 – City Level Employment by Industry – Lodi

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	1,302	1,299	1,298	1,298	1,296	1,294
<b>Mining</b>	1	1	1	1	1	1
<b>Utilities</b>	3	3	3	3	3	3
<b>Construction</b>	2,146	2,330	2,522	2,619	2,691	2,750
<b>Manufacturing</b>	2,831	2,809	2,820	2,854	2,894	2,941
<b>Wholesale trade</b>	533	520	498	477	457	440
<b>Retail trade</b>	4,613	4,564	4,507	4,396	4,276	4,163
<b>Transportation and warehousing</b>	1,618	1,672	1,731	1,785	1,840	1,901
<b>Information</b>	111	109	109	107	106	104
<b>Finance and insurance</b>	4,430	4,574	4,736	4,899	5,055	5,217
<b>Real estate and rental and leasing</b>	2,106	2,203	2,319	2,436	2,555	2,683
<b>Professional, scientific, and technical services</b>	1,255	1,246	1,235	1,227	1,220	1,213
<b>Management of companies and enterprises</b>	595	628	662	697	731	768
<b>Business Support and Waste Management Services</b>	1,145	1,198	1,262	1,321	1,376	1,431
<b>Educational services; private</b>	810	833	859	883	906	932
<b>Health care and social assistance</b>	4,028	4,272	4,544	4,789	5,040	5,306
<b>Arts, entertainment, and recreation</b>	357	372	396	418	440	460
<b>Accommodation and food services</b>	2,993	3,063	3,166	3,284	3,411	3,553
<b>Other services (except public administration)</b>	2,211	2,265	2,353	2,437	2,527	2,621
<b>Government</b>	2,161	2,200	2,242	2,291	2,343	2,401
<b>Total</b>	35,247	36,163	37,263	38,221	39,168	40,183

Table 15 – City Level Employment by Industry – Manteca

<b>Industry</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>
<b>Agriculture</b>	340	338	337	337	336	335
<b>Mining</b>	0	0	0	0	0	0
<b>Utilities</b>	0	0	0	0	0	0
<b>Construction</b>	1,522	1,652	1,789	1,858	1,910	1,951
<b>Manufacturing</b>	481	477	479	486	494	504
<b>Wholesale trade</b>	1,125	1,115	1,098	1,080	1,063	1,049
<b>Retail trade</b>	4,795	4,770	4,741	4,682	4,617	4,552
<b>Transportation and warehousing</b>	1,921	1,993	2,070	2,142	2,217	2,298
<b>Information</b>	128	127	126	124	123	121
<b>Finance and insurance</b>	844	877	913	950	986	1,023
<b>Real estate and rental and leasing</b>	1,348	1,411	1,486	1,562	1,639	1,721
<b>Professional, scientific, and technical services</b>	773	796	814	823	830	836
<b>Management of companies and enterprises</b>	50	53	55	58	61	64
<b>Business Support and Waste Management Services</b>	1,429	1,696	2,081	2,510	3,010	3,635
<b>Educational services; private</b>	707	731	758	782	807	834
<b>Health care and social assistance</b>	3,616	3,846	4,103	4,336	4,575	4,829
<b>Arts, entertainment, and recreation</b>	614	636	671	704	736	765
<b>Accommodation and food services</b>	3,171	3,265	3,401	3,559	3,732	3,925
<b>Other services (except public administration)</b>	1,839	1,891	1,977	2,058	2,146	2,238
<b>Government</b>	1,668	1,690	1,712	1,739	1,767	1,797
<b>Total</b>	26,372	27,363	28,611	29,791	31,045	32,478

Table 16 – City Level Employment by Industry – Mountain House

Industry	2025	2030	2035	2040	2045	2050
Agriculture	0	0	0	0	0	0
Mining	0	0	0	0	0	0
Utilities	0	0	0	0	0	0
Construction	56	62	68	72	74	76
Manufacturing	8	8	8	8	9	9
Wholesale trade	5	5	5	4	4	4
Retail trade	28	27	26	24	22	20
Transportation and warehousing	112	107	103	99	95	91
Information	2	2	2	2	2	2
Finance and insurance	9	9	10	10	10	11
Real estate and rental and leasing	86	92	100	108	116	125
Professional, scientific, and technical services	119	126	133	137	140	142
Management of companies and enterprises	0	0	0	0	0	0
Business Support and Waste Management Services	85	84	83	81	79	77
Educational services; private	157	163	169	175	181	188
Health care and social assistance	112	120	129	137	146	155
Arts, entertainment, and recreation	28	29	32	33	35	37
Accommodation and food services	30	31	34	36	39	43
Other services (except public administration)	21	21	22	23	24	25
Government	0	0	0	0	0	0
<b>Total</b>	<b>857</b>	<b>888</b>	<b>922</b>	<b>949</b>	<b>975</b>	<b>1,004</b>

Table 17 – City Level Employment by Industry – Ripon

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	118	116	116	116	115	115
<b>Mining</b>	0	0	0	0	0	0
<b>Utilities</b>	0	0	0	0	0	0
<b>Construction</b>	858	935	1,015	1,056	1,087	1,112
<b>Manufacturing</b>	827	818	822	837	854	875
<b>Wholesale trade</b>	192	194	197	200	203	206
<b>Retail trade</b>	718	692	663	609	556	510
<b>Transportation and warehousing</b>	609	632	655	677	700	725
<b>Information</b>	1	1	1	1	1	1
<b>Finance and insurance</b>	194	200	207	214	221	228
<b>Real estate and rental and leasing</b>	221	228	236	244	252	260
<b>Professional, scientific, and technical services</b>	334	379	420	446	467	487
<b>Management of companies and enterprises</b>	0	0	0	0	0	0
<b>Business Support and Waste Management Services</b>	110	103	95	88	81	74
<b>Educational services; private</b>	145	148	150	152	154	157
<b>Health care and social assistance</b>	390	416	445	471	499	527
<b>Arts, entertainment, and recreation</b>	222	231	244	257	270	281
<b>Accommodation and food services</b>	584	596	614	635	657	681
<b>Other services (except public administration)</b>	441	451	468	483	500	518
<b>Government</b>	412	418	424	432	439	447
<b>Total</b>	6,375	6,557	6,773	6,919	7,056	7,204

Table 18 – City Level Employment by Industry – Stockton

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	1,804	1,784	1,777	1,777	1,767	1,757
<b>Mining</b>	8	8	8	8	8	8
<b>Utilities</b>	1,479	1,482	1,502	1,523	1,543	1,565
<b>Construction</b>	4,843	5,231	5,634	5,836	5,987	6,109
<b>Manufacturing</b>	6,266	6,212	6,239	6,324	6,423	6,540
<b>Wholesale trade</b>	5,711	5,689	5,648	5,607	5,566	5,532
<b>Retail trade</b>	15,195	14,989	14,747	14,277	13,780	13,320
<b>Transportation and warehousing</b>	12,041	12,472	12,935	13,365	13,807	14,289
<b>Information</b>	979	970	964	954	944	936
<b>Finance and insurance</b>	6,440	6,677	6,945	7,216	7,477	7,749
<b>Real estate and rental and leasing</b>	9,890	10,242	10,660	11,074	11,491	11,933
<b>Professional, scientific, and technical services</b>	6,554	6,902	7,182	7,346	7,468	7,581
<b>Management of companies and enterprises</b>	1,541	1,617	1,695	1,773	1,850	1,931
<b>Business Support and Waste Management Services</b>	10,801	10,870	10,924	10,934	10,902	10,821
<b>Educational services; private</b>	3,321	3,424	3,536	3,639	3,741	3,856
<b>Health care and social assistance</b>	26,648	28,354	30,259	31,983	33,756	35,640
<b>Arts, entertainment, and recreation</b>	2,312	2,387	2,504	2,615	2,720	2,817
<b>Accommodation and food services</b>	10,519	10,799	11,204	11,675	12,185	12,753
<b>Other services (except public administration)</b>	8,332	8,533	8,862	9,173	9,505	9,855
<b>Government</b>	31,255	31,682	32,133	32,670	33,226	33,844
<b>Total</b>	165,940	170,324	175,359	179,768	184,146	188,836

Table 19 – City Level Employment by Industry – Tracy

<b>Industry</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>
<b>Agriculture</b>	246	244	244	244	243	242
<b>Mining</b>	0	0	0	0	0	0
<b>Utilities</b>	5	5	5	5	5	5
<b>Construction</b>	1,440	1,558	1,680	1,742	1,788	1,825
<b>Manufacturing</b>	3,204	3,174	3,190	3,238	3,294	3,361
<b>Wholesale trade</b>	1,548	1,548	1,548	1,547	1,546	1,545
<b>Retail trade</b>	5,122	5,107	5,089	5,050	5,006	4,960
<b>Transportation and warehousing</b>	27,018	29,342	31,986	34,597	37,435	40,701
<b>Information</b>	140	139	138	136	135	134
<b>Finance and insurance</b>	1,007	1,046	1,090	1,134	1,176	1,221
<b>Real estate and rental and leasing</b>	1,548	1,603	1,668	1,733	1,798	1,867
<b>Professional, scientific, and technical services</b>	2,254	2,300	2,332	2,348	2,359	2,368
<b>Management of companies and enterprises</b>	52	54	55	56	58	59
<b>Business Support and Waste Management Services</b>	1,351	1,308	1,252	1,199	1,143	1,082
<b>Educational services; private</b>	652	672	695	716	737	760
<b>Health care and social assistance</b>	2,970	3,158	3,368	3,558	3,754	3,961
<b>Arts, entertainment, and recreation</b>	488	500	518	536	552	567
<b>Accommodation and food services</b>	3,738	3,830	3,962	4,114	4,279	4,463
<b>Other services (except public administration)</b>	2,873	2,971	3,132	3,288	3,456	3,635
<b>Government</b>	2,356	2,389	2,423	2,464	2,507	2,554
<b>Total</b>	58,014	60,947	64,375	67,706	71,271	75,310

Table 20 – Unincorporated Northwest

<b>Industry</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>
<b>Agriculture</b>	5,227	5,194	5,183	5,184	5,167	5,150
<b>Mining</b>	46	46	46	44	42	41
<b>Utilities</b>	92	92	95	97	100	102
<b>Construction</b>	3,382	3,662	3,954	4,100	4,210	4,299
<b>Manufacturing</b>	3,641	3,611	3,626	3,673	3,729	3,794
<b>Wholesale trade</b>	2,244	2,230	2,207	2,183	2,159	2,140
<b>Retail trade</b>	1,867	1,854	1,837	1,805	1,770	1,736
<b>Transportation and warehousing</b>	5,683	5,829	5,984	6,125	6,268	6,421
<b>Information</b>	379	376	374	370	367	364
<b>Finance and insurance</b>	352	364	376	389	401	414
<b>Real estate and rental and leasing</b>	1,793	1,869	1,958	2,048	2,139	2,236
<b>Professional, scientific, and technical services</b>	609	601	593	587	582	578
<b>Management of companies and enterprises</b>	16	17	18	19	20	21
<b>Business Support and Waste Management Services</b>	3,730	3,943	4,210	4,457	4,698	4,948
<b>Educational services; private</b>	661	674	688	700	712	726
<b>Health care and social assistance</b>	1,288	1,359	1,439	1,510	1,583	1,659
<b>Arts, entertainment, and recreation</b>	512	531	561	590	617	642
<b>Accommodation and food services</b>	2,272	2,332	2,420	2,522	2,633	2,756
<b>Other services (except public administration)</b>	3,115	3,189	3,311	3,426	3,548	3,677
<b>Government</b>	849	865	882	903	924	948
<b>Total</b>	<b>37,757</b>	<b>38,638</b>	<b>39,760</b>	<b>40,732</b>	<b>41,671</b>	<b>42,655</b>

Table 21 – Unincorporated Northwest

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	2,881	2,850	2,839	2,839	2,824	2,807
<b>Mining</b>	135	134	134	132	129	127
<b>Utilities</b>	159	159	162	165	168	171
<b>Construction</b>	1,223	1,339	1,461	1,524	1,571	1,608
<b>Manufacturing</b>	3,098	3,072	3,085	3,126	3,174	3,230
<b>Wholesale trade</b>	956	942	917	893	869	850
<b>Retail trade</b>	358	366	375	393	414	433
<b>Transportation and warehousing</b>	7,672	7,951	8,252	8,531	8,818	9,131
<b>Information</b>	30	30	30	29	29	28
<b>Finance and insurance</b>	50	53	57	60	64	68
<b>Real estate and rental and leasing</b>	333	346	362	378	394	411
<b>Professional, scientific, and technical services</b>	639	687	728	752	771	788
<b>Management of companies and enterprises</b>	28	30	33	35	38	41
<b>Business Support and Waste Management Services</b>	1,155	1,118	1,071	1,025	978	926
<b>Educational services; private</b>	140	143	147	151	154	158
<b>Health care and social assistance</b>	1,434	1,575	1,738	1,890	2,051	2,227
<b>Arts, entertainment, and recreation</b>	86	89	93	97	100	104
<b>Accommodation and food services</b>	278	282	287	294	300	308
<b>Other services (except public administration)</b>	497	513	539	564	590	619
<b>Government</b>	5,553	5,679	5,813	5,974	6,143	6,333
<b>Total</b>	26,706	27,359	28,122	28,851	29,579	30,369

Table 22 – Unincorporated East

Industry	2025	2030	2035	2040	2045	2050
<b>Agriculture</b>	5,603	5,556	5,541	5,541	5,518	5,494
<b>Mining</b>	6	6	6	6	6	6
<b>Utilities</b>	32	32	33	34	35	36
<b>Construction</b>	657	712	768	796	817	834
<b>Manufacturing</b>	787	779	783	796	810	828
<b>Wholesale trade</b>	450	446	440	433	427	421
<b>Retail trade</b>	458	445	429	401	372	346
<b>Transportation and warehousing</b>	245	253	262	271	279	289
<b>Information</b>	46	45	45	44	44	44
<b>Finance and insurance</b>	143	149	156	163	170	177
<b>Real estate and rental and leasing</b>	167	174	183	191	199	209
<b>Professional, scientific, and technical services</b>	255	249	243	239	237	234
<b>Management of companies and enterprises</b>	36	39	41	43	45	47
<b>Business Support and Waste Management Services</b>	240	235	228	221	214	206
<b>Educational services; private</b>	86	88	90	91	93	94
<b>Health care and social assistance</b>	225	240	257	272	288	304
<b>Arts, entertainment, and recreation</b>	42	45	48	52	56	59
<b>Accommodation and food services</b>	313	320	331	343	357	371
<b>Other services (except public administration)</b>	322	327	334	341	349	356
<b>Government</b>	266	270	274	279	285	290
<b>Total</b>	10,380	10,410	10,492	10,559	10,600	10,646



## TECHNICAL MEMORANDUM

To: The San Joaquin Council of Governments

From: The Center for Business and Policy Research at the University of the Pacific

Date: 11.10.2025

RE: Conversion of Employment Estimates used for the 2026 RTP/SCS

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The forthcoming 2026 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) must consider future population growth and housing needs, as well as economic, environmental, and public health goals. The demographic, housing, and economic estimates used for the 2026 RTP/SCS are derived from the report titled *San Joaquin County Demographic and Employment Forecast* (February 24, 2025).

While that report uses the same forecasting methodology used for the 2020 forecast, it measures employment using the broader U.S. Bureau of Economic Analysis (BEA) definition rather than the narrower U. S. Bureau of Labor Statistics Quarterly Census of Employment and Wages (BLS-QCEW) definition. Forecast series prior to 2020 relied on BLS-QCEW definitions. For that reason, both the 2020 and 2025 forecasts were converted to be consistent with prior forecasts series for use in the 2022 and 2026 Regional Transportation Plan (RTP) technical modeling. This ensures that modeling metrics reported in the RTP are consistent from plan to plan over time.

This technical memorandum describes the process used to convert employment data from the February 24, 2025 forecast to align with BLS-QCEW definitions and present revised employment tables to facilitate comparison with the 2022 and prior year RTP/SCS employment estimates.

### Conversion Methodology

The *San Joaquin County Demographic and Employment Forecast* (February 24, 2025) is based on estimates using the REMI PI+ model. The REMI model is built upon and forecasts according to the BEA definition of employment. This broader measure includes wage and salary employees, self-employed workers, military personnel, and private household workers (such as housekeepers, cooks, and gardeners).

By contrast, the BLS-QCEW definition covers only wage and salary employees whose employers are required to pay state unemployment insurance (UI) taxes. It therefore excludes self-employed individuals and other worker categories included under the BEA definition.

During the most recent decade for which comparable data are available (2013–2022), total employment measured using the BLS-QCEW definition averaged approximately 26 percent lower than the broader BEA measure. Consequently, it is necessary to convert the BEA-based employment estimates produced by the REMI model to align with the narrower BLS-QCEW definition for consistency with prior RTP/SCS analyses.

The conversion process involved two main steps:

- 1) Establishing a common benchmark year, and
- 2) Converting BEA-based employment data to BLS-QCEW-consistent values.

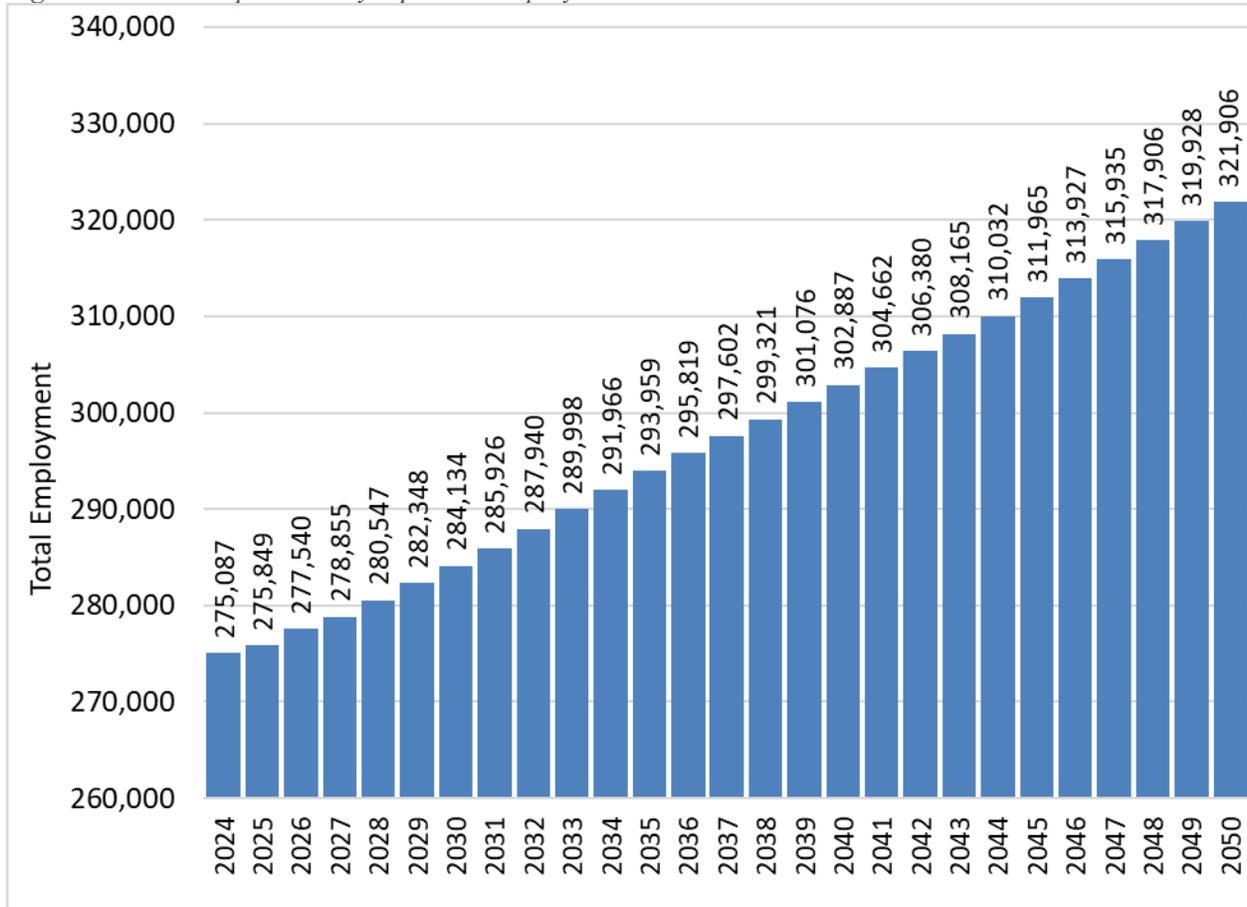
Because 2022 is the most recent year for which local BEA employment data are available, 2020 was selected as the benchmark year to minimize the effects of any backward data revisions. Once 2020 countywide employment totals were established, the BEA-based data were compared with BLS-QCEW data to determine the relative relationship between the two definitions. Each city and industry was then assigned a share of total employment that preserved the internal structure of the BEA data while ensuring that totals matched the BLS-QCEW countywide figures.

This proportional relationship was applied to all subsequent forecast years, maintaining the growth trajectories of the BEA series while anchoring total employment to the BLS-QCEW-adjusted base year.

The updated forecast tables presented below therefore represent BLS-QCEW-based estimates corresponding to the tables from the *San Joaquin County Demographic and Employment Forecast* of February 24, 2025.

**Section One: County Forecast**

*Figure 8 – San Joaquin County Updated Employment Forecast*



*Table 4 – Adjusted Forecast: Employment by Industry 2025-2050*

<b>Industry</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>	<b>2050</b>	<b>Change 2025-2050</b>	<b>% Change 2025-2050</b>
Agriculture	12,682	12,581	12,546	12,543	12,491	12,436	-246	-1.9%
Construction	12,560	13,613	14,708	15,260	15,675	16,009	3,449	27.5%
Financial Activities	24,179	25,108	26,177	27,248	28,310	29,432	5,252	21.7%
Government	32,304	32,792	33,308	33,923	34,563	35,276	2,972	9.2%
Healthcare and Education	34,317	36,358	38,638	40,705	42,828	45,094	10,778	31.4%
Information	1,299	1,287	1,279	1,265	1,252	1,240	-59	-4.5%
Leisure and Hospitality	21,019	21,589	22,431	23,370	24,363	25,439	4,420	21.0%
Manufacturing	17,399	17,249	17,326	17,563	17,840	18,167	768	4.4%
Other Services	14,428	14,803	15,420	16,006	16,631	17,294	2,865	19.9%
Professional and Business Services	24,913	25,706	26,543	27,223	27,865	28,548	3,634	14.6%
Retail Trade	24,485	24,257	23,991	23,479	22,944	22,458	-2,027	-8.3%
Transportation, Warehousing, Utilities	46,149	48,730	51,626	54,432	57,425	60,814	14,665	31.8%
Wholesale	10,114	10,061	9,965	9,870	9,777	9,700	-414	-4.1%
<b>Total</b>	<b>275,849</b>	<b>284,134</b>	<b>293,959</b>	<b>302,887</b>	<b>311,965</b>	<b>321,906</b>	<b>46,058</b>	<b>16.7%</b>

## Section Two: Local Area Forecast

Tables 10 and 11 summarize projected employment growth.

*Table 10 – San Joaquin County Employment Forecast – City Breakdown*

Location	2025	2030	2035	2040	2045	2050
Escalon City	1,894	1,894	1,911	1,920	1,931	1,950
Lathrop City	11,456	11,887	12,392	12,873	13,362	13,878
Lodi City	25,166	25,820	26,606	27,290	27,966	28,690
Manteca City	18,829	19,537	20,428	21,271	22,166	23,189
Mountain House CDP	612	634	658	678	696	717
Ripon City	4,552	4,682	4,836	4,940	5,038	5,144
Stockton City	118,480	121,610	125,205	128,353	131,479	134,828
Tracy City	41,422	43,516	45,963	48,342	50,887	53,771
<i>Total Unincorporated</i>	<u>53,437</u>	<u>54,554</u>	<u>55,959</u>	<u>57,221</u>	<u>58,440</u>	<u>59,740</u>
<b>Total San Joaquin County</b>	<b><u>275,849</u></b>	<b><u>284,134</u></b>	<b><u>293,959</u></b>	<b><u>302,887</u></b>	<b><u>311,965</u></b>	<b><u>321,906</u></b>

*Table 11 – Projected Employment Change for San Joaquin County Local Areas*

Location	2025-35 change	2025-35 % change	2025-50 change	2025-50 % change
Escalon City	17	0.9%	56	2.9%
Lathrop City	936	8.2%	2,422	21.1%
Lodi City	1,439	5.7%	3,524	14.0%
Manteca City	1,599	8.5%	4,360	23.2%
Mountain House CDP	46	7.6%	105	17.1%
Ripon City	284	6.2%	592	13.0%
Stockton City	6,725	5.7%	16,348	13.8%
Tracy City	4,542	11.0%	12,349	29.8%
<i>Total Unincorporated</i>	<u>2,522</u>	<u>4.7%</u>	<u>6,302</u>	<u>11.8%</u>
<b>Total San Joaquin County</b>	<b><u>18,110</u></b>	<b><u>6.6%</u></b>	<b><u>46,058</u></b>	<b><u>16.7%</u></b>