



WEST EL MONTE WAY Master Development Plan

Community Development Block Grant
09-PTAE-6307

Prepared for the
City of Dinuba

November, 2011



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1. INTRODUCTION

The City of Dinuba received a State of California Community Development Block Grant Program General Allocation Planning grant and a Technical Assistance grant (09-PTAE-6307) to prepare a conceptual development plan through a community-based outreach process. The City hired RRM Design Group to facilitate the community outreach and urban design components and Wahlstrom & Associates to develop an economic assessment of the plan area.

Located approximately halfway between Fresno and Visalia, this town of 21,000 people is a regional destination for those living in Reedley, Orange Cove, Kingsburg, Cutler and Orosi. West El Monte Way is the primary westerly approach to the city of Dinuba. It has developed in a piecemeal manner over the years without a clear vision for the corridor's physical image and character. The road has recently been widened to four lanes and has created an opportunity to master plan and guide development along the corridor by preparing this Master Development Plan. Further, the City has recognized that the Master Development Plan should be grounded in an understanding of the existing economic and market conditions to address the basic land use and parcelization issues, and to guide the future character and image of new development along the corridor.

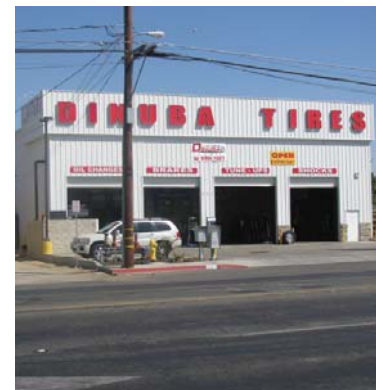
Wahlstrom & Associates (W&A) prepared the economic analysis that provided a foundation for the Master Development Plan and implementation efforts. The analysis identified the commercial retail businesses and other commercial uses that could be attracted to the study area. This provided guidance on the potential to build out the study area's undeveloped and underdeveloped properties.

2. PURPOSE

The purpose of this Master Development Plan is to provide guidance and vision for future development of private and City-owned vacant land along West El Monte Way. This is not a binding document, but rather a tool to help communicate the vision and a resource for decision making as development continues along West El Monte Way. City officials, staff and developers should use this tool for guiding the development of property along the corridor consistent with community's vision for this area.



Pedestrian sidewalk separated by landscaped parkway



Existing retail



Existing retail



LEGEND

City-Owned Parcels

Existing Conditions & Buildings

FIGURE 1 - Study Area



Vacant land within the study area. Holiday Inn Express located in the distance.

3. OVERVIEW OF EXISTING CONDITIONS

3.1 Project Setting

The project area is located within the city of Dinuba. The West El Monte Way Commercial Center Master Development Plan Study Area extends along both sides of West El Monte Way from Alta Avenue (Road 80) on the east to Road 70 on the west. Surrounding uses include light industrial, general commercial, community commercial, medium low residential, medium residential, medium high residential and high residential.

The City Redevelopment Agency owns several vacant parcels along the corridor which are the focus of this Master Development Plan. The City-owned parcels are identified in yellow on Figure 1.

The plan area boundary was adjusted to Road 72 on the west following the completion of the economic study by W&A and the Site Constraints and Opportunity Analysis. The land north and south of West El Monte Way between Road 72 and Road 70 is vacant and is not prime for development any time soon.



3.2 Existing Economic Conditions

The report prepared by W&A, dated April 22, 2011 and included herein by reference, informs Dinuba’s community leaders about the market opportunities to attract new commercial real estate investments and businesses to the West El Monte Way corridor. The report describes the city’s unmet demand for retail services and the specific retail businesses that could be attracted to Dinuba. The Master Development Plan’s proposed land uses, the total amount of space that can be supported and the size of parcels that should be developed are based on the information included in this report.

The key findings and results of W&A’s economic report are summarized below. The full report, attached as Appendix A, includes 12 data tables that describe Dinuba’s demographic characteristics, sales tax earnings, supply of commercial space, spending leakages and potential business attraction targets.

Demographics

- Retail establishments located along the West El Monte corridor serve a market area of 104,000 residents from Dinuba, Reedley, Orange Cove, Kingsburg, Cutler and Orosi.
- The market area demographics include a relatively large number of young people and Hispanics. The Dinuba market area household incomes are lower than the surrounding region.

Retail Sales Performance

- The opening of the Walmart Supercenter fueled Dinuba’s expansion of taxable retail sales.
- The recession caused a significant decline in sales tax receipts earned in Dinuba.

Built Commercial Space Along the West El Monte Corridor

- Nearly 550,000 sf of commercial space has been developed along the West El Monte Way corridor. Retail establishments, including the Walmart Supercenter, account for two-thirds of the occupied retail space along the corridor.



Dinuba's Built Commercial Space

- Dinuba has more than 1.2 million sf of built commercial space.
- Retail and food service establishments occupy nearly 1 million sf of the built space. The Walmart Supercenter and the Kmart on East El Monte Way account for 40% of Dinuba's retail space.
- Dinuba also has a 16% commercial vacancy rate with more than 200,000 sf of vacant space.

Sales Earned by Dinuba Area Retail Establishments

- Dinuba's retail and food service establishments earn approximately \$173 million in sales.
- The West El Monte corridor captures 54% of the city's total retail sales.
- The Walmart Supercenter is the corridor's anchor store and attracts customers from neighboring communities.

Spending Leakages

- Dinuba has done a great job of expanding retail sales by attracting the Walmart Supercenter and other new retailers to the West El Monte corridor. Nearly all spending leakages have been plugged, and only \$17.3 million of spending leakages remains available to be retained.

Total Available Spending

- The spending leakages to attract new stores are relatively small and insufficient, which means that future growth must rely on attracting more regional customers. However, the spending leakages combined with untapped regional spending leaves \$111.9 million of consumer spending available to be captured by retailers in Dinuba.



Retail Attraction Opportunities

- The available spending is sufficient to support the development of a new 200,000 to 250,000 sf shopping center along the West El Monte corridor.
- The shopping center could be anchored by another well-known national chain clothing store or department store such as Kohl's, Marshalls or Sears. A new hardware store could function as a second shopping center anchor tenant.
- Other types of stores that could be attracted to the corridor include furniture, building material, office supply, electronic, shoe, home furnishing, liquor, computer software, home appliance, book and jewelry stores, and pharmacies.

Retail Store Types that Dinuba Should Not Pursue

- Retail stores and store types that cannot realistically be attracted to the West El Monte corridor due to the market area's relatively small size and regional competition include Target, Costco, Home Depot, Lowe's, grocery stores and large format consumer electronic stores.

Business Attraction and Implementation Plan

The process of successfully attracting new commercial retailers to Dinuba is constrained by local government budget cuts, reduction in City staff and the State's threat to eliminate redevelopment agencies, which, if implemented, would cause another round of local government budget cuts. A list of recommendations that should guide the Master Development Plan implementation is provided in Section 8 herein.



CITY OF DINUBA GENERAL PLAN POLICIES STATEMENT



Adopted September 23, 2008



General Plan Policies Statement
document cover

4. RELATIONSHIP TO EXISTING PLANNING DOCUMENTS

4.1 Dinuba General Plan

The Master Development Plan is consistent with and furthers the goals, objectives, policies and standards of the Dinuba General Plan by providing a vision for development within the West El Monte Way study area.

4.2 City of Dinuba General Plan Policies Statement

The General Plan Policies Statement document is a consolidated version of the General Plan, containing only the goals, objectives, policies and standards. The Urban Boundary, Circulation and Land Use Elements include the most relevant information used in developing the Master Development Plan for West El Monte Way. This Master Development Plan will be used as a guide for the thoughtful implementation of the various goals, objectives, policies and standards found in the General Plan Policies Statement.



5. PUBLIC PARTICIPATION

This Master Development Plan is the result of a collaborative consensus building process involving Dinuba City staff, consultants and key project participants. Public involvement included two public workshops and one design collaboration meeting with City staff. These efforts helped to identify project issues, examined land use and circulation alternatives and assisted in the selection of the preferred conceptual design. This collaborative process resulted in the final West El Monte Way Conceptual Design that reflects the community's vision for West El Monte Way.

5.1 Workshop #1/City Council Hearing/EDC Meeting

The first series of public outreach meetings were held on August 9, 2011. The consultants met with the Economic Development Committee and the City Council in back-to-back public meetings. These meetings were conducted to update the participants on the status of the economic analysis, land use concept and Master Development Plan. RRM Design Group and W&A facilitated a presentation that included the project background and process, opportunities and constraints, an economic overview, a review of land use alternatives and concept, and a discussion of the next steps. The input received from the participants was used to refine the land use concept.

5.2 Workshop #2/City Council Hearing

After refining the land use concept, a second public meeting was conducted on September 27, 2011 during the regularly scheduled City Council hearing. At this public hearing, RRM Design Group and Wahlstrom and Associates facilitated a presentation that included a review of the background and process, opportunities and constraints, economic overview, development alternatives and the draft land use concept. The comments received from the public at the hearing have been incorporated into the Master Development Plan.



Commercial center with public art



Commercial center with proper articulation and use of building materials



Commercial building with emphasis on corner treatment

6. PROJECT OBJECTIVES

Commercial, office and residential development are essential components of the City of Dinuba’s economic development strategy for the study area. The following objectives establish the framework to implement that strategy:

6.1 Improve Dinuba’s Economy

- a. Provide a new employment center for commerce and residential uses compatible with existing development.
- b. Improve the jobs/housing balance in Dinuba by providing local job opportunities.
- c. Provide infrastructure and circulation improvements to support economic development.

6.2 Get the Retail Right

- a. Encourage uses that complement downtown businesses.
- b. Concentrate retailers to encourage and facilitate pedestrian storefront shopping.
- c. Encourage a mix of local and national tenants.
- d. Establish high-quality development that is consistent with the agrarian character of Dinuba and that will serve as a regional shopping destination.

6.3 Build a Variety of Buildings

- a. Define the character of West El Monte Way with a variety of building types, by their relationship to each other and how they define the street edge.
- b. Develop a commercial center that is noteworthy for technological innovation in building design with regard to lighting, heating and cooling, material reuse, stormwater storage, water conservation and energy reduction.



Commercial center with a quasi-public plaza and a variety of building forms

6.4 Make Great Spaces

- a. Provide great spaces that are open to the public to give access and identity to the various commercial and office centers along West El Monte Way.
- b. Provide outdoor spaces that contribute to Dinuba’s unique character, distinguishing West El Monte Way from other local and regional centers.

6.5 Create a Variety of Housing Choices

- a. Provide a range of housing types, including small lot single-family, duplexes, triplexes, rowhouses, mixed-use units and apartments in order to accommodate residents of varying income, age and lifestyle.
- b. Provide rental and ownership options to ensure long-term vitality.



Multi-family residential with central courtyard

6.6 Get The Parking Right

- a. Encourage compact, mixed-use style developments that allow drivers to park once in order to complete multiple daily tasks on foot.
- b. Incorporate residential uses into the Master Development Plan area in order to reduce the number of off-site parking spaces, since many of the residents can walk, rather than drive, to the retailers/offices to purchase everyday necessities, eat out or have coffee.



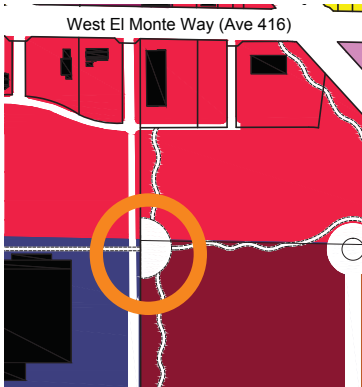
Commercial building with silo style corner building



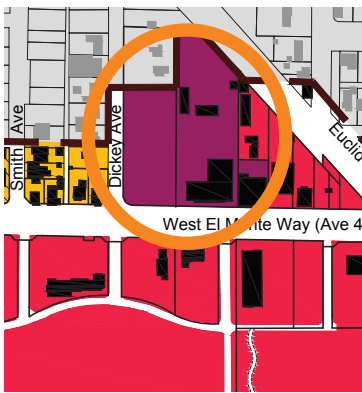
7. MASTER DEVELOPMENT PLAN

7.1 Land Use Plan

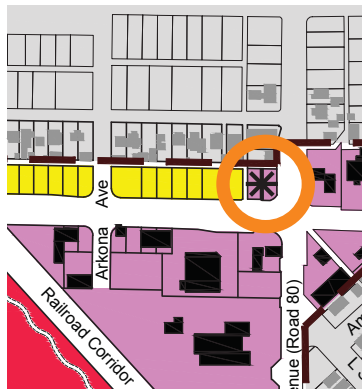
The focus of the Master Development Plan is to evaluate existing land uses (Figure 3), recommend land uses for City-owned vacant land and to maximize economic viability through incorporation of the information presented in the economic analysis. The land use concept found in Figure 2 is a reflection of the information gathered from the economic analysis and public input. Land uses within the Master Development Plan study area include commercial, office, residential, industrial and public facility. The distribution of land uses has been developed with the end-user in mind through the incorporation of public/private gathering spaces, pedestrian-oriented buildings, connectivity, mixed-use buildings, opportunities for public art and plazas.



Plaza feature proposed east of Walmart



Mixed-use land use area



Gateway treatment at intersection of West El Monte Way and Road 80

TABLE 1 - Proposed Land Use Distribution			
Land Use	Acres	Proposed Building Square Feet	Potential Units
Proposed Uses			
Commercial - General	30.7	334,323	-
Professional Office	4.6	50,094	-
Residential - Medium (8 to 15 du/ac)	1.4	-	11 to 21
Residential - High (15 to 24 du/ac)	6.6	-	99 to 158
Mixed-Use	4.5	49,005	67 to 108

Existing Uses			
Land Use	Acres	Proposed Building Square Feet	Potential Units
Commercial - Community	21.1	-	-
Commercial - General	97.5	-	-
Light Industrial	29	-	-
Residential - Medium	3.5	-	-
Residential - Medium-High	2.8	-	-
Residential - High	3.6	-	-
Semi-Public	0.2	-	-

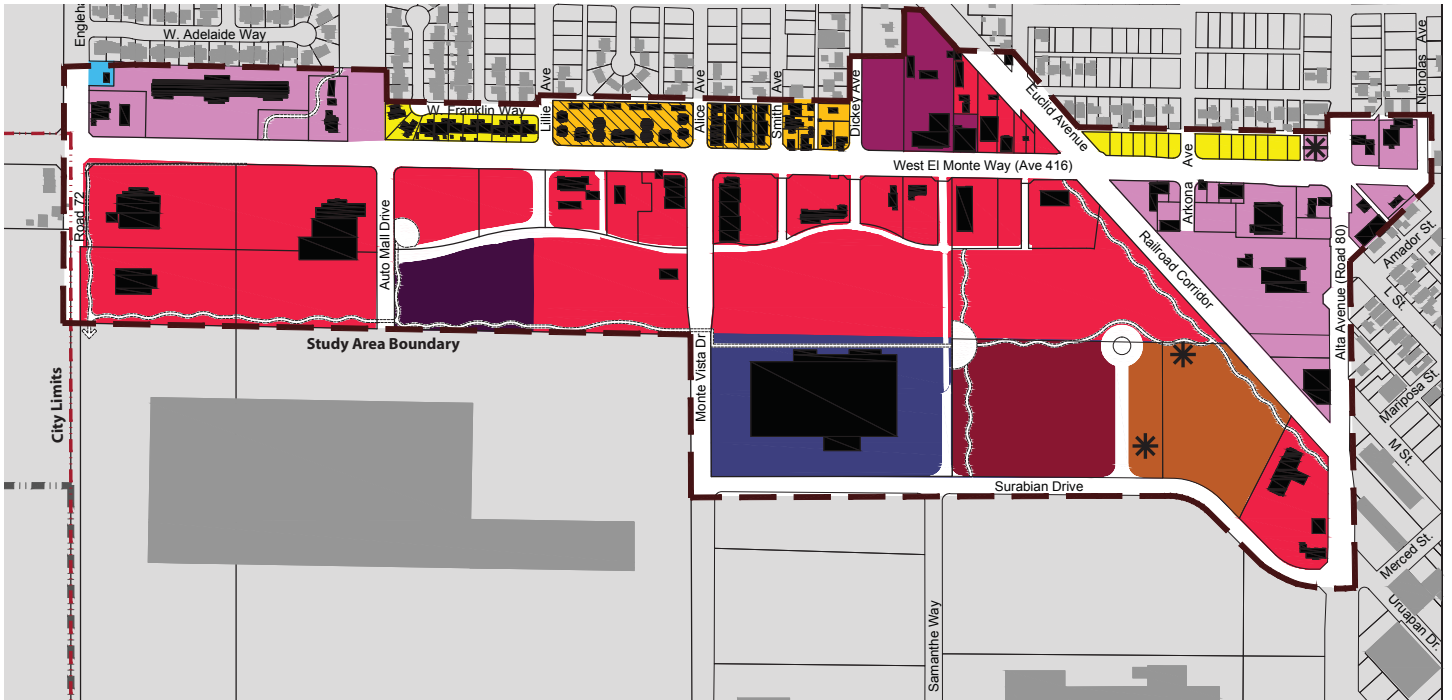


FIGURE 2 - Land Use Concept

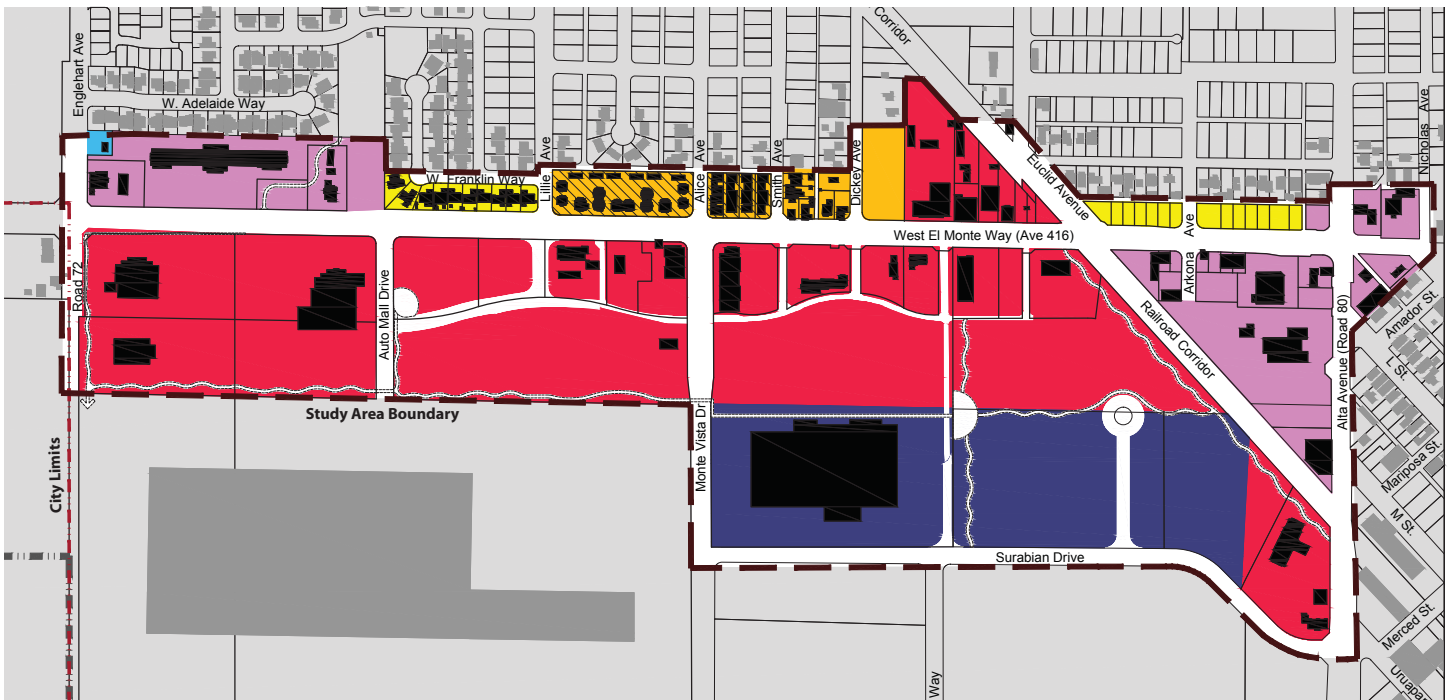


FIGURE 3 - Existing Land Use

LEGEND

 Commercial - Community (Existing Designation)	 Residential - Medium (Existing Designation)	 Light Industrial (Existing Designation)	 Commercial - General (Proposed Designation)	 Residential - High (Proposed Designation)
 Commercial - General (Existing Designation)	 Residential - Medium High (Existing Designation)	 Public/ Semi-Public (Existing Designation)	 Mixed Use (Proposed Designation)	 Park or Green Space (Proposed within Land Use)
 Residential - High (Existing Designation)			 Professional Office (Proposed Designation)	



FIGURE 4 - Commercial Land Use Concept

7.2 Commercial



Mixed-use structure with retail on the first floor and office above

Overview

The economic analysis states that up to 250,000 sf of gross leasable commercial space can be absorbed by the community. This translates into approximately 23 acres of land. The Master Development Plan includes 30 acres of commercial-general and 4.5 acres of mixed-use. This Master Development Plan is intended to be a 20-year vision for West El Monte Way, therefore a higher number of acres of commercial land have been planned for the corridor. To allow for more options within the market and to provide for increase in demand over time, resulting from community growth. Market conditions will determine if the excess commercial land is viable. The total commercial area in the plan area is being increased from 118 acres to 148 acres.



Commercial Center Concept

Design

Site development for new commercial should be designed with people in mind, rather than simply cars and parking. The smaller size of Dinuba and the location of the West El Monte Way commercial corridor lends itself to the creation of a welcoming place through careful placemaking as the commercial area develops. Commercial areas should not only provide for shopping and dining activities, they should also create a focal point by providing walkways, seating, plazas and other gathering spaces for pedestrians.

Where appropriate, it is envisioned that commercial buildings will be oriented toward the street for a pedestrian-friendly design. Pedestrian-scaled buildings with parking areas located away from West El Monte Way and out of view from the proposed residential units are a preferred design approach. Mixed-use structures with retail on the first floor and residential or office on the upper floors are encouraged throughout the corridor, but have only been designated on the parcels located east of Dickey Avenue. (See Figure 4).

Developers should refer to the City’s General Plan Urban Design Element for a comprehensive list of goals, objectives, policies and standards. The Urban Design Element includes a broad look at design on a community-wide level and provides specific design policies and standards for commercial development.




Commercial plaza with outdoor dining



Big box structures should use a variety of materials and colors to break up the facade



LEGEND

 Professional Office
(Proposed General Plan Designation)

Proposed Land Use:
Professional Office

FIGURE 5 - Office Land Use Concept

7.3 Office

Overview

Located east of Auto Mall Drive, 4.6 acres of professional office are included in the land use concept shown in Figure 4. This area can accommodate 50 sf and is intended to attract uses such as medical and dental offices, banks and other professional offices. Uses should be compatible with surrounding commercial uses.

Design

Buildings should be located around the perimeter of the site with parking located centrally or to the south. Office buildings should incorporate vertical tower elements to make the buildings more identifiable from West El Monte Way. A meandering path along the south and west of the office area has been proposed to encourage pedestrian mobility throughout the study area.



This office building reflects an agrarian-style character

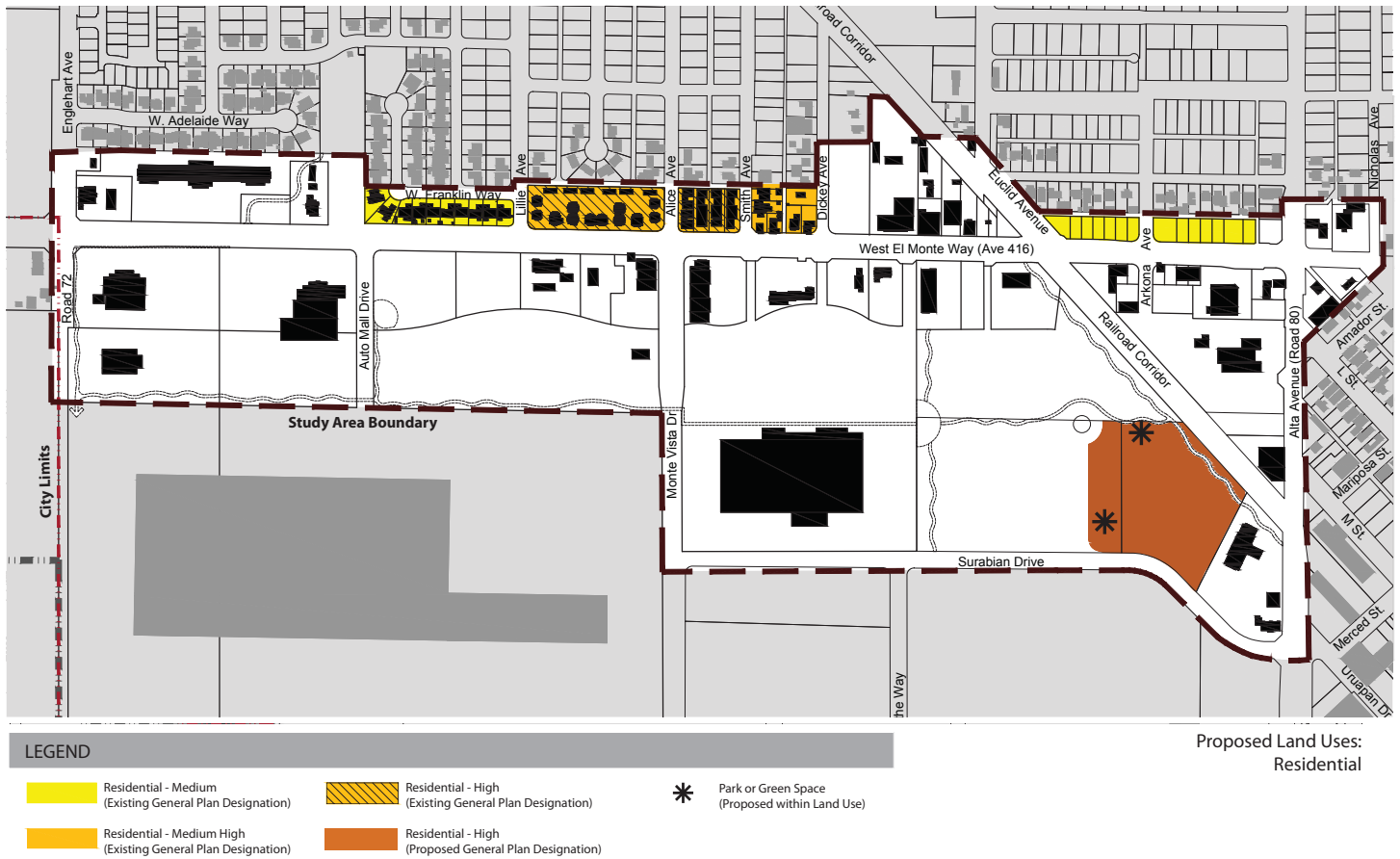


FIGURE 6 - Residential Land Use Concept

7.4 Residential

Overview

Three residential densities are proposed within the study area including residential-medium, residential-medium high, and residential-high (Figure 6). Existing residential units located between Dickey Avenue and Auto Mall Drive shall remain unaffected by the Master Development Plan until owners redevelop or remodel. Redevelopment and remodels are subject to the policies and standards found within the General Plan Policies Statement.

As West El Monte Way becomes an even greater destination for shopping, dining and everyday living, the incorporation of residential units into the study area will help to reduce the number of daily automobile trips by emphasizing pedestrian-friendly amenities such as wide sidewalks, landscaping and plazas. Residential units will support nearby businesses and will attract a variety of age and income demographics.

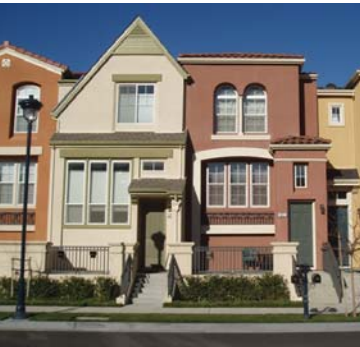
Up to 21 residential-medium and 158 residential-high units are possible within the study area.



Multi-family residential



Multi-family housing



Row housing with individually massed units



Small lot detached housing

Design

The design of residential units within the study area should include the policies and standards found in the General Plan Policies Statement. Of primary importance is for the design and architecture in order to be consistent with Dinuba’s character and for the design to be compatible with the surrounding commercial land uses. Additional design considerations are as follows:

Lot Layout and Site Planning

Multi-family residential development should be carefully designed to be compatible with adjacent commercial uses. Residential units should be designed to minimize fronting or backing onto commercial loading zones, parking areas or trash enclosures.

Buffers and Transitions

Most land uses can be compatible when adjacent uses are taken into consideration during the design process. The use of visual buffers, such as setbacks, landscaping, walls, berms, or a combination thereof, assist in creating a transition between land uses.

Building Form

The design of multi-family structures should encourage porches and articulated entries, and should have distinct architectural articulation.



LEGEND			
	Arterial Roadway (Existing)		Private Street (Existing)
	Collector Street (Existing)		Private Street (Proposed)
	Public Street (Existing)		Multi-Use Trail (Proposed)
	Public Sidewalk (Existing)		Public Sidewalk (Proposed)

FIGURE 7 - Circulation Concept

7.5 Circulation

Vehicular Circulation

Figure 7 illustrates the existing and proposed vehicular and pedestrian circulation network. The Master Development Plan study area is made up of arterials, collectors, public streets and private streets. West El Monte Way and Alta Avenue will continue to serve as the primary arterial access routes to the corridor. Other access roads include Surabian Drive, Monte Vista Drive, Auto Mall Drive, Road 72, Euclid Avenue, Dickey Avenue, Smith Avenue, Alice Avenue and Lillie Avenue. Other private access opportunities are available from Monte Vista Drive and West El Monte Way. Proposed access opportunities to private parcels are proposed from Surabian Drive and Auto Mall Drive. (See Figure 7.)

New developments should provide reciprocal vehicular access to existing developments to prevent unnecessary traffic on West El Monte Way.



West El Monte Way looking west



Illustration of potential mixed-use project on north side of West El Monte Blvd.



Opportunity to include a meandering sidewalk located away from the street edge

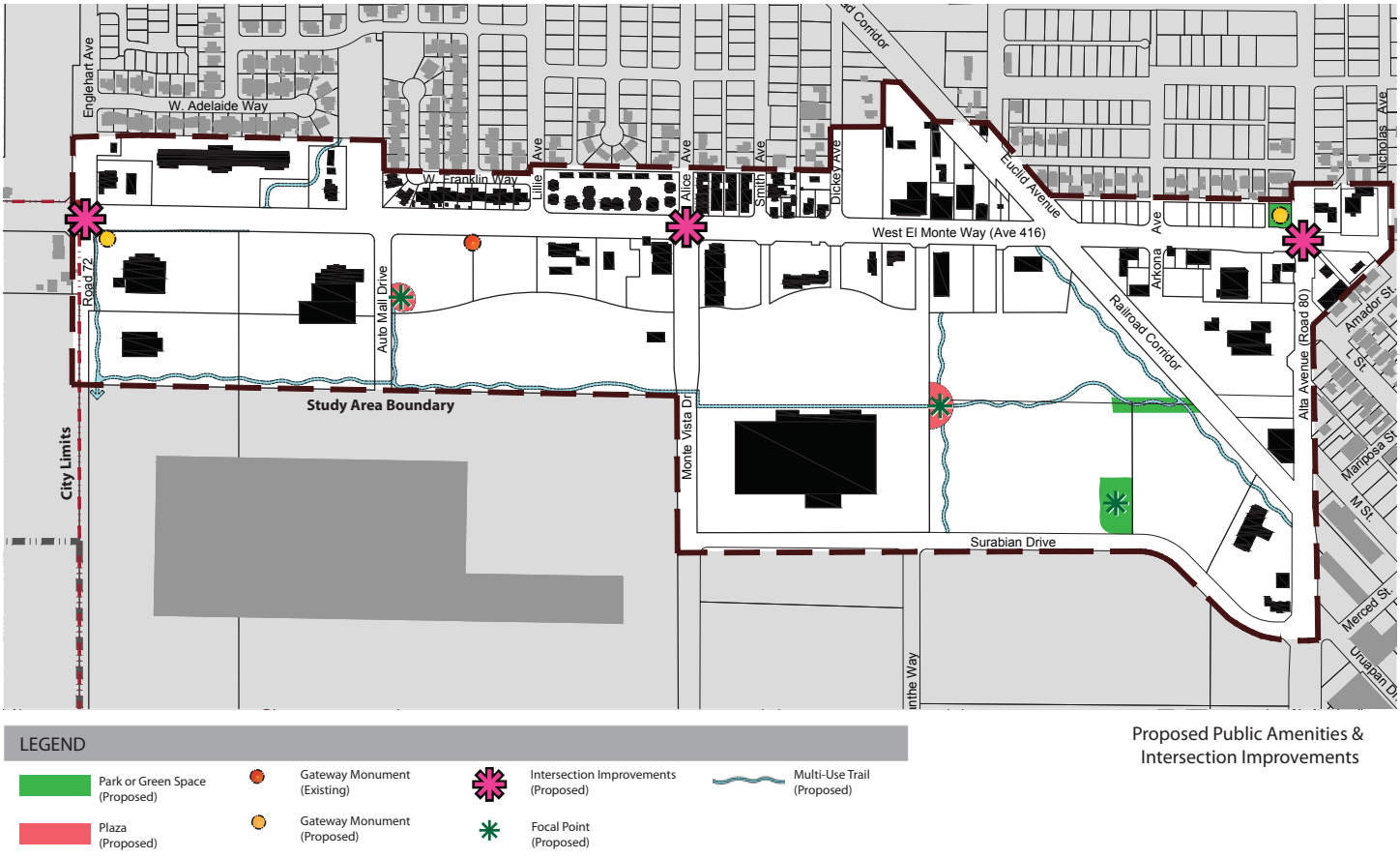


Sidewalks should not dead-end

Pedestrian Circulation

Another priority identified by process participants is the inclusion of pedestrian-friendly streets and retail centers that are linked by a series of private/public plazas and green spaces. The land use plan incorporates plazas/green spaces (and links them with sidewalks and walkways) and enhanced intersection improvements.

West El Monte Way is perceived as a difficult and unsafe street to cross for pedestrians who live on the north side of the street. Intersections enhanced with stamped and colored concrete or a similar application will give prominence to the crosswalk and will make drivers more aware of pedestrians. Incorporating bulbouts at side streets will reduce the crossing time for pedestrians and make them feel more secure. Other improvements include the provision of parkways separating the sidewalk from the street and street furnishings such as benches, lighting, transit shelters and trash cans, or even lit crosswalks with flashing lights.



Proposed Public Amenities & Intersection Improvements

FIGURE 8 - Public Realm Amenities Concept

7.6 Public Realm

The West El Monte Way public realm includes all exterior places, linkages and built form elements that are physically and/or visually accessible regardless of ownership. These elements can include, but are not limited to, streets, pedestrian ways, bikeways, plazas, gateways, parks, natural features and building interfaces. Figure 8 identifies the proposed public realm amenities within the study area.

Landscaping

Landscaping should continue to be provided along West El Monte Way to beautify the corridor and make it more pedestrian friendly. The recently planted palms have set the precedent for the corridor in terms of species, spacing and height. New landscaping along the corridor should mimic these improvements (see Figure 9). Private landscaping should include trees that provide shade for pedestrians and parked automobiles. Project entryways should be enhanced with ornamental trees, shrubs, grasses and annual flowers. Drought-tolerant species should be used whenever possible.



Public realm sidewalk and landscaping improvements



LEGEND

- ★ Palm Trees (Along West El Monte Way)
- Accent Trees (At Entries & Gateways)
- ⊙ Shade Trees (Along Pedestrian Corridors)

Proposed Landscaping

FIGURE 9 - Landscape Concept



Pedestrian amenities such as benches, trash cans and landscaping make walking more pleasant

Sidewalks and Walkways

A continuous network of pedestrian facilities that effectively links the various land uses within the Master Development Plan area should be provided.

Figure 7 diagrams existing and proposed sidewalks within the Master Development Plan area. Where possible, sidewalks should be separated from the street edge by a landscaped park strip. Separating sidewalks from the street edge gives pedestrians a sense of security when walking adjacent to busy streets such as West El Monte Way.

Pedestrian walkways may or may not be located adjacent to a street edge. Walkways should be at least six feet wide and include pedestrian amenities such as landscaping, street furnishings, lighting and enhanced paving materials. Figure 7 illustrates where proposed pedestrian walkways should be provided.



Plazas

One or more public or private plazas should be developed within the Master Development Plan area. Plazas are an essential component of a modern day commercial shopping center as they encourage social interaction and community pride. Plazas should be designed with a variety of functions in mind. Functions such as concerts, festivals, farmers markets and outdoor dining should be considered when planning a plaza.



Outdoor plazas should be designed to accommodate a number of different activities

Intersection Improvements

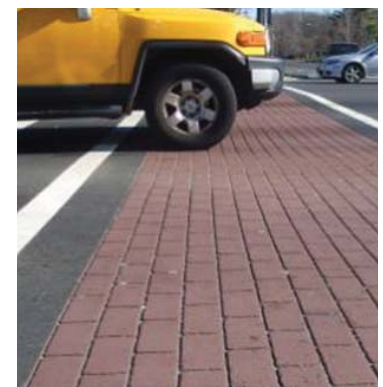
Three intersections have been identified for improvements: West El Monte Way with Alta Avenue, Monte Vista Drive, and Road 72. Many residents live north of the Master Development Plan area and are likely to frequent the stores, restaurants and offices as the area becomes more popular. Currently, West El Monte Way is a fast-moving, wide and intimidating road for pedestrians to cross. Improving the intersections with stamped and colored concrete or a similar application will give prominence to the crosswalk and will make drivers more aware of pedestrians. Other improvements that may make pedestrians feel comfortable include user-activated crossing lights, median islands, bulbouts at corners or “countdown” walk/“don’t walk” signals.

Gateways and Focal Points

One existing and one proposed city gateway can be found within the Master Development Plan area. The existing sign is located east of the intersection of West El Monte Way and Auto Mall Drive. This sign includes an electronic display used to announce important city events and advertising for local businesses. The proposed gateway monument is located within the northwest parcel of the intersection of Alta Avenue and West El Monte Way. This gateway should include a monument sign with the city name and logo. The gateway sign should be enhanced with landscaping, lighting, public art and/or a water feature. A matching gateway marker should also be used at Road 72 and West El Monte Way.



Concept of a vertical gateway element for the intersection of West El Monte Way and Road 80



Textured and/or colored surfaces at pedestrian crossings alert drivers to the presence of pedestrians



Existing city entry sign should be enhanced with landscaping



Centennial Park located adjacent to the study area

Parks

Figure 8 includes an area that is proposed for a park. The park has been proposed to serve new residential development and to buffer the residents from commercial uses. The park should include active and passive recreation elements that appeal to a wide variety of users and is supportive of the high-density residential use associated with it.

8. IMPLEMENTATION ACTIONS

1. Prepare a general plan amendment to update the study area’s land uses to reflect the land use recommendations found herein.
2. Incorporate the market area demographics and Dinuba’s shopping attractions into the City’s web site.
3. Upload the West El Monte Corridor Master Development Plan onto the City’s web site.
4. Distribute press releases about the Master Development Plan to the Visalia and Fresno newspapers and to local blogs that are publishing news about Dinuba.
5. Prepare and distribute a request for qualifications to attract real estate developers that can implement the West El Monte Corridor Master Development Plan.
6. Represent Dinuba at state and regional International Council of Shopping Centers (ICSC) events and at other meetings with retail business prospects.
7. Organize a “red team” of business leaders that can meet with new business prospects about Dinuba’s business climate; this would be an affordable alternative to full-time economic development staff.
8. Install public sidewalks and a multi-use trail to complete the connectivity for pedestrians as noted in Figures 7 and 8.



WEST EL MONTE CORRIDOR COMMERCIAL ATTRACTION OPPORTUNITIES

Prepared by
WAHLSTROM & ASSOCIATES

April 22, 2011

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SUMMARY OF FINDINGS AND REPORT ORGANIZATION

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- Dinuba has more than 1.2 million square feet of built commercial space.

- Retail and food service establishments occupy nearly one-million square feet of the built space. The Wal-Mart Supercenter and the K-mart on East El Monte Way accounts for 40 percent of Dinuba's retail space.
- Dinuba also has a 16 percent commercial vacancy rate with more than 200,000 square feet of vacant space.

Sales Earned by Dinuba Area Retail Establishments

- Dinuba's retail and food service establishments earn \$173 million of sales.
- The West El Monte Corridor captures 54 percent of the City total retail sales.
- Of course, the Wal-Mart Supercenter is the corridor's anchor store that attracts customers from neighboring communities.

Spending Leakages

Dinuba has done a great job of expanding retail sales by attracting the Wal-Mart Supercenter and other new retailers to the West El Monte Corridor. Nearly all spending leakages have been plugged, and only \$17.3 million of spending leakages remains available to be retained.

Total Available Spending

- The spending leakages are relatively small and insufficient to attract new stores, which means that future growth must rely on attracting more regional customers. However, the spending leakages combined with untapped regional spending leaves \$111.9 million of consumer spending available to be captured by retailers in Dinuba.

Retail Attraction Opportunities

- The available spending is sufficient to support the development of a new 200,00 to 250,000 square foot shopping center along the West El Monte Corridor.
- The shopping center could be anchored by a well-known national chain clothing store or department store such as Kohl's, Marshalls, or Sears. A new hardware store could function as a second shopping center anchor tenant.
- Other store types that could be attracted to the corridor include furniture, other building materials, office supplies, electronics, pharmacies, shoe stores, home furnishings, liquor, computer software, home appliances, books and jewelry.

Retail Store Types that Dinuba Should Not Pursue

Retail stores and store types that cannot realistically be attracted to the West El Monte Corridor due to the market area's relatively small size and regional competition include Target, Costco, Home Depot, Lowe's, grocery stores, and large format consumer electronic stores.

Business Attraction and Implementation Plan

The process of successfully attracting new commercial retailers to Dinuba is constrained by local government budget cuts, the elimination of the City's Economic Development staff, and the State's threat to eliminate Redevelopment Agencies—which if implemented would cause another round of local government budget cuts. A list of recommendations that should guide the master plan implementation is provided below.

- Incorporate the market area demographics and Dinuba's shopping attractions into the City's web site.
- Upload the West El Monte Corridor Master Plan onto the City's web site.
- Distribute press releases about the Master Plan to the Visalia and Fresno newspapers, and to local blogs that are publishing news about Dinuba.
- Prepare and distribute a request for qualifications to attract real estate developers that can implement the West El Monte Corridor Master Plan.
- Represent Dinuba at the State and regional ICSC events, and at other meetings with retail business prospects.
- Organize a "red team" of business leaders that can meet with new business prospects about Dinuba's business climate; this would be an affordable alternative to full time economic development staff.

ORGANIZATION OF REPORT

This report documents nearly six months of work on the West El Monte Corridor Master Plan, which functions as Dinuba's main entry way. The commercial market study report provides important input into the Master Plan by identifying the specific retail businesses that could be attracted to Dinuba, the total amount of new commercial space that can be developed along the corridor, and the phasing and implementation steps. Below is a brief explanation of each section of the report.

Section 1

Describes the population, household and income characteristics of Dinuba and the surrounding market area.

Section 2

Describes the retail sales tax trends in Dinuba and the region during the past decade.

Section 3

Describes the built commercial space characteristics in the City of Dinuba and along the West El Monte Corridor

Section 4

Estimates the retail sales that have been earned by store type in four quadrants of the City and the City total. Retail sales earnings along the West El Monte Corridor by store type are also estimated.

Section 5

Describes the total spending available to capture from spending leakages and the available regional spending.

Section 6

Identifies the type of retail businesses that could be attracted to the West El Monte Corridor, and the amount of new commercial retail space that could be developed.

Section 7

Recommends an approach to implement the Master Plan.

* * *

1. MARKET AREA DEMOGRAPHICS

The demographic trends and characteristics shape the amount of spending available to be captured in Dinuba, the types of stores that can be attracted, and the amount of commercial real estate that can be absorbed along the West El Monte Corridor (See Tables 1 through 4). The demographic factors that shape the market forces for new commercial space are described below:

- Dinuba is a small town with nearly 23,000 residents living within the Dinuba census tracts; this includes approximately 21,000 people that live within the City limits (Table 1).
- Dinuba's retail establishments attract customers from 104,000 people that live in Dinuba and the nearby communities of Orange Cove, Cutler-Orosi, Reedley, and Kingsburg.
- Dinuba has experienced a rapid population growth rate of 2.3 percent per year since 2000, which is double California's growth rate.
- Dinuba is a young community with 34 percent of its residents under the age of 18, and another 28 percent are young adults between the ages of 18 to 34—In comparison, less than half California's residents are under 35 years of age (Table 2).
- Dinuba's residents earn an average household income of \$50,900 per year, which is significantly lower than the \$62,200 average household incomes earned in Fresno and Tulare Counties; and Dinuba's household incomes are far behind California's average household income of \$80,400 (Table 3). This means that Dinuba has less spending per household available for retail products and food services.
- Dinuba's household incomes have slightly declined during the past decade, but the \$700 per year decline of household incomes is less severe than the \$1,300 decline of household incomes in California since 2000. This means that Dinuba has been hit less severely by the recession than the larger region and state.
- Incomes in the surrounding market area actually improved during the past decade, which leaves residents with more to spend for commercial products and services. However, household incomes certainly declined in the Dinuba market area following the 2008 financial crises, and the 2008–2009 recession. Between 2008 and 2009, statewide median

household incomes declined by 5.7 percent; local data is not yet available.¹

- Sixty-one percent of households within the Dinuba Census Tracts earn less than \$50,000 per year, compared to only 54 percent of residents in the two-county region. Conversely, only 9 percent of households within the Dinuba Census Tracts earn more than \$100,000 per year compared to 16 percent of households in the two-county region (Table 4). This means that a successful store mix in Dinuba would provide products and services that appeal to lower income residents.

* * *

¹ Franchise Tax Board data. Note that this report uses average household income rather than median household income data.

2. RETAIL SALES TAX TRENDS

Dinuba's retailers have experienced a reasonable amount of growth, largely due to the success of attracting the Wal-Mart Supercenter (Table 5).

- Fresno and Visalia dominate the retail market by capturing about half of the two county region's taxable retail sales.
- Dinuba retailers earned \$175.7 million of taxable sales in 2008, which is very close to the combined taxable sales earned in Reedley and Kingsburg. However, Dinuba retailers earn only a fraction of the taxable retail sales earned in Fresno and Visalia.
- Dinuba experienced an inflation adjusted 8.9 percent growth of taxable sales receipts between 2000 and 2006; this almost doubled the growth rates in Fresno and Visalia, and greatly exceeded the stagnant growth of sales in Reedley and Kingsburg. The opening of the Wal-Mart Supercenter fueled Dinuba's expansion of taxable retail sales.
- The recession has caused a significant decline in the sales tax receipts earned in Dinuba, Fresno, and Visalia. Dinuba's taxable sales declined by \$33 million between 2006 and 2008, which amounts to 5.5 percent of sales. Neighboring Kingsburg and Reedley experienced a smaller loss of sales since 2008.

* * *

3. BUILT COMMERCIAL SPACE



WEST EL MONTE CORRIDOR

Approximately 536,000 square feet of commercial space has been built along the West El Monte Corridor. Approximately 300,000 square feet of built space is occupied by retail stores. The Wal-Mart Supercenter accounts for two-thirds of the corridor's occupied retail space.²

Other types of built space along the corridor include 44,000 square feet of space occupied by food service establishments; 20,000 square feet occupied by personal service establishments; 20,000 square feet of office space; and the Holiday Inn Express and the Veteran's Memorial Building (68,000 square feet).

Approximately 87,000 square feet of commercial space is vacant along the corridor (See Table 6). The 60,000 square foot former Brett's Ford Dealer accounts for the other large vacancy along the West El Monte Corridor. However, the City indicates that the former car dealer building will be reoccupied by a mega-church.

CITYWIDE COMMERCIAL SPACE

Dinuba has more than 1.2 million square feet of built commercial space, with 34 percent of the total space located along the West El Monte corridor (Table 7). Some important characteristics of Dinuba's built space are described below.

- Dinuba's retail establishments occupy 914,000 square feet of commercial space (Table 8). This is a relatively small amount of space because if consolidated Dinuba's built retail space would fit within one of Fresno's regional shopping centers.
- Nearly 40 percent of Dinuba's retail space is occupied by the Wal-Mart Supercenter and the K-mart on East El Monte Way.

² A new 10,500 square foot Big 5 Sporting Goods store was opened after the data included in this report was collected. Thus, the new Big 5 is not included in the built space analysis.

Commercial Vacancies

Dinuba's desire to develop new commercial space along the West El Monte Corridor is counterbalanced by the need to absorb more than 200,000 square feet of vacant commercial retail space. Dinuba's 16 percent commercial vacancy rate is higher than Fresno's 11.7 percent commercial vacancy rate.³ More than half of the community's vacant space is concentrated in the El Monte shopping center located along the East El Monte Corridor. This once thriving shopping center is nearly dark. A Kmart remains as the anchor tenant, but the Save Mart grocery store closed, which left a very large vacant store in the middle of the center.



* * *

³ CB Richard Ellis. Fresno Retail Market View, 2010 2nd quarter

4. RETAIL SALES EARNINGS

Dinuba's retail and food service establishments earn \$173 million of sales, not including the sales earned by gas stations, car dealers, and wholesale establishments engaged in business-to-business transactions (i.e. Best Buy distribution center). Retailers located along the West El Monte Corridor earned \$93 million of sales, which amounts to 54 percent of the City total (See Table 9). The information below summarizes the sales performance among Dinuba's key retail sectors.

- The general merchandise and discount stores in Dinuba earn approximately \$100 million per year after adjusting for the sale of non-taxable items. The Wal-Mart Supercenter attracts customers from Dinuba and the surrounding market area. Sales earned by Wal-Mart, Kmart, and the smaller general merchandise stores accounts for 57 percent of Dinuba's retail sales.
- Food stores earn approximately \$45 million of sales. This includes \$36.4 million of sales earned by supermarkets and grocery stores, and \$7.5 million of sales earned by convenience stores. Food sales earned by the Wal-Mart Supercenter are not included in the food store sales.
- Food service establishments earn approximately \$34.4 million of sales. Sit-down restaurants earn \$22 million of sales, fast food establishments earn \$10 million of sales; small specialty stores earn the remaining amount of food service sales.
- The other stores that generate significant retail sales include the Auto Zone and Kragen (O'Reilly's) auto parts establishments; Rite Aid and Walgreen's drugstores; and Ace Hardware (formerly Dinuba Lumber).

* * *

5. SPENDING AVAILABLE TO BE CAPTURED

Dinuba retailers can capture available spending leakages as well as available spending from the surrounding region; this is described below.

Spending Leakages

Table 10 indicates that Dinuba residents spend only \$51.9 million at retail stores compared to \$173.5 million of sales captured by Dinuba retailers.⁴ A comparison of household spending and sales earned by area stores indicate that Dinuba has only \$17.3 million of spending leakages available to be retained. The spending leakages are relatively small and insufficient to attract new stores, which means that future growth must rely on attracting more regional customers.

Available Regional Spending

Table 11 estimates that the combined total of spending leakages and available regional spending offer \$111.9 million of available spending to be attracted to Dinuba. New retail prospects can capitalize on the Wal-Mart Supercenter magnet that attracts customers from the surrounding communities of Cutler-Orosi, Reedley, Orange Cove, and Kingsburg.⁵ Although Dinuba has become a regional shopping destination, area retailers still must compete with regional shopping centers and big box retailers in the nearby larger cities of Visalia and Fresno that are located within a 30- to 45-minute drive.

* * *

⁴ Spending estimates at retail stores do not include the spending by Dinuba area residents on automobiles, gasoline, and other personal services not listed in Table 10.

⁵ Spending estimates at retail stores do not include the spending by Dinuba area residents on automobiles, gasoline, and other personal services not listed in Table 11.

6. RETAIL BUSINESS ATTRACTION OPPORTUNITIES

The available spending is sufficient to support the development of a new shopping center of between 200,00 and 250,000 square feet near the Wal-Mart Supercenter. The shopping center could be anchored by a well-known national chain clothing store, or a department store such as Kohl's, Marshalls or Sears. A new hardware store could function as a second shopping center anchor tenant. The retail attraction prospects, and the amount of new retail space that could be developed along the West El Monte corridor are summarized in Table 12 and described below.

Apparel and Department Stores

\$27.7 million of spending at apparel or department stores is available to be captured in Dinuba. The available spending could support one or two stores and as much as 110,000 square feet of new retail space. New apparel stores such as Marshalls, Kohl's, Ross, or Burlington Coat Factory could anchor a new shopping center near the Wal-Mart Supercenter.



Hardware Store

The available spending of \$11.6 million can support between 30,000 and 40,000 square feet of new hardware store such as Orchard Supply Hardware. The Dinuba market area does not have sufficient spending available to attract a Lowe's or Home Depot, which earn an average of \$30 and 45 million per store.

Building Material Specialty Stores

Approximately \$5 million of spending is available to attract 15,000 to 20,000 square feet of building material specialty stores such as paint, tile, glass shops, and garden centers. The West El Monte corridor offers a good location for new building material specialty stores.

Furniture Store

Dinuba is not large enough to attract national chain furniture stores. However, sufficient spending is available to attract smaller furniture stores that already have a presence in Fresno or Visalia. In addition, the established downtown furniture stores may be recruited to relocate to the West El Monte Corridor.

Office Supplies

Available spending is insufficient to attract national chain stores such as Office Depot or Staples. However, \$2.9 million of household spending

may attract a 12,000 to 15,000 square foot office supply store along the West El Monte Corridor. Potential tenants could include regional chains or independent office supply establishments in Fresno or Visalia.

Radio, TV & Electronics

Available spending can support 10,000 to 15,000 square feet of new space for household, automobile, and other specialty electronics stores. Possible tenants include regional chains or independent electronics stores in Fresno or Visalia. Radio Shack is already established in Dinuba, and is unlikely to establish a second store along the West El Monte corridor.

Home Furnishings & Household Appliances

Available spending can support 5,000 to 10,000 square feet of new space for a regional chain or a locally owned home furnishings store. The Dinuba market area is not large enough to attract national chain stores such as Bed Bath & Beyond or Crate & Barrel, which require at least \$7 million of sales per store.

Liquor Store

Available spending can support 6,000 to 10,000 square feet of new liquor store space. A large format liquor store such as BevMo would be a natural regional attraction complementing the Wal-Mart Supercenter.

Other stores

The West El Monte corridor could also include smaller commercial spaces of 6,000 square feet or less. Potential tenants include computer & software stores, bookstores and jewelry stores.

RETAIL STORE TYPES THAT DINUBA SHOULD NOT PURSUE

Retail stores that cannot realistically be attracted to the West El Monte Corridor due to the lack of market size and insufficient demand are described below.

Target or Costco

The Dinuba market area is simply not large enough to support an additional big box general merchandise store that would directly compete with and take sales away from the established Wal-Mart Supercenter.

Home Depot or Lowe's

The Dinuba market area is not large enough to attract a Lowe's or Home Depot, which average \$30 to \$45 million of sales per store. The available

demand is only strong enough to support a smaller hardware store such as Orchard Supply or a locally owned hardware store.

Grocery Stores

The market demand for grocery stores in Dinuba is saturated, and any efforts to attract a new grocery store will take sales away, and may cause one or more of the established stores to close. The Wal-Mart Supercenter also attracts a significant amount of regional spending on food, and thus competes with grocery stores in the surrounding communities. Wal-Mart's success at capturing grocery store sales absorbs all available demand and reduces the opportunities to attract new grocery stores to Dinuba.

Consumer Electronics

The Best Buy regional distribution center handles Internet sales for the Western US, which generates a significant amount of sales tax revenue for the City. Apparently, it is the corporate policy of Best Buy to not open a retail store near a distribution center. Thus, a Best Buy store is not an option for Dinuba, and the demand is insufficient to attract other consumer electronic chain stores.

Shoe Stores

Payless shoes relocated from the El Monte Center to the Wal-Mart Center within the past couple years. Given the relatively soft demand, it is probably not viable to attract more shoe stores to locate along the West El Monte corridor.

* * *

7. BUSINESS ATTRACTION IMPLEMENTATION PLAN

The process of successfully attracting new commercial retailers to Dinuba is constrained by local government budget cuts, the elimination of the City's Economic Development staff, and the State's threat to eliminate Redevelopment Agencies—which if implemented would cause another round of local government budget cuts.

Therefore, it is unrealistic for Dinuba to invest staff time and resources on a pro-active effort to attract retailers to the corridor. Due to the lack of funding the City must rely on a network of community volunteers, contract consultants, and private investors to implement the Master Plan by attracting real estate investors and commercial businesses to the West El Monte Corridor. Recommendations on how the City can implement the master plan area are described below.

- Improve the City's website to describe the Dinuba market area demographics and the City's current role as a regional retail destination.
- Upload the West El Monte Corridor Master Plan onto the City's web site and encourage the Master Plan to be downloaded by community residents, retailers and potential investors.
- Distribute press releases about the Master Plan to the Visalia and Fresno newspapers. The Master Plan should also be distributed to local blogs that publish news about Dinuba.
- City staff or a contract consultant should prepare a Request For Qualifications to attract real estate developers to implement the West El Monte Corridor master plan.
- City staff or a contract consultant should represent Dinuba at the State and regional ICSC events, and at other meetings with retail business prospects. Dinuba City staff and/or contract consultants follow up with potential retail prospects and/or real estate investors after attending conferences and meetings.
- Organize a "red team" of business leaders that can meet with new business prospects about Dinuba's business climate. The "red team" concept is an affordable alternative to full time economic development staff.

BUSINESS ATTRACTION INCENTIVES

The Governor's proposal to eliminate Redevelopment Agencies is a big blow to the ability of local governments to offer financial incentives for

new retail business and commercial developers. At this moment, Redevelopment Agency funding cannot be used to enter into new public/private partnership agreements to provide incentives for new private investment. Consequently, the City will have to rely on land developers and retail business prospects to make the required improvements needed to implement the master plan.

* * *

APPENDIX: RETAIL SPENDING LEAKAGE TABLES

1. Population Growth Trends in the Dinuba Market Area
1990-2009
2. Population by Age in the Dinuba Market Area, 2009
3. Average Household Income Trends in the Dinuba Market
Area, 1990-2009
4. Household Income Distribution in the Dinuba Market Area
2009
5. Taxable Retail Sales Trends in the Dinuba Region
2000-2008
6. Supply of Commercial Space Along the Wet El Monte
Corridor, 2010
7. Summary of Built Commercial Space and Vacancies in
Dinuba's Commercial Areas, 2010
8. Inventory of Occupied Retail Space in Dinuba, 2010
9. Estimates of Sales Earned by Business Establishments in
Dinuba and the West El Monte Corridor, 2010
10. Dinuba Spending Leakages
11. Spending by Store Type Available to Capture Along the East
El Monte Corridor
12. West El Monte Corridor Retail Business Prospects

Table 1
Population Growth Trends
In the Dinuba Market Area
1990 - 2009

Geographic Area	1990	2000	Annual Growth Rate 1990-2000	2009	Annual Growth Rate 2000-2009
Dinuba Census Tracts (1)	14,568	18,667	2.5%	22,900	2.3%
Dinuba Market Area (2)	74,033	87,875	1.7%	104,200	1.9%
Tulare and Fresno Counties	979,411	1,167,428	1.8%	1,378,300	1.9%
California	29,760,021	33,871,648	1.3%	37,663,900	1.2%

Data Sources: Claritas and the US Census American Community Survey Estimates

Analysis: Wahlstrom & Associates

Notes: (1) Dinuba includes Tulare County Census Tracts 4.01, 4.02, 5.01, and 5.02

(2) Market Area includes the Dinuba Census Tracts, the Census Tracts surrounding Dinuba, Cutler-Orosi, Orange Cove, Kingsburg, and Reedley

**Table 2
Population By Age
In the Dinuba Market Area, 2009**

Population Estimates	Age < 18	Age 18-34	Age 35-54	Age 55-64	Age 65 +	Total
Dinuba Census Tracts (1)	7,700	6,400	5,200	1,700	1,900	22,900
Dinuba Market Area (2)	33,200	28,700	24,600	7,900	9,800	104,200
Tulare and Fresno Counties	417,800	364,800	336,700	122,500	136,500	1,378,300
California	9,586,600	9,222,500	10,700,500	3,900,500	4,253,800	37,663,900
Percent Distribution by Age Group						
Dinuba Census Tracts (2)	34%	28%	23%	7%	8%	
Dinuba Market Area	32%	28%	24%	8%	9%	
Tulare and Fresno Counties	30%	26%	24%	9%	10%	
California	25%	24%	28%	10%	11%	

Data Sources: US Census 2000, Claritas and the US Census American Community Survey Estimates for 2009

Analysis: Wahlstrom & Associates

Notes: (1) Dinuba includes Tulare County Census Tracts 4.01, 4.02, 5.01 and 5.02

(2) Market Area includes the Dinuba Census Tracts, the Census Tracts surrounding Dinuba, Cutler-Orosi, Orange Cove, Kingsburg, and Reedley

Table 3
Average Household Income Trends
In the Dinuba Market Area
1990 - 2009

	1990	2000	2009	Real Income Change 1990 - 2000	Real Income Change 2000 - 2009
Dinuba Census Tracts	\$45,900	\$51,600	\$50,900	\$5,700	-\$700
Dinuba Market Area	\$49,600	\$53,500	\$56,600	\$3,900	\$3,100
Tulare & Fresno Counties	\$56,200	\$59,600	\$62,200	\$3,400	\$2,600
California	\$75,900	\$81,700	\$80,400	\$5,800	-\$1,300

Data Sources: Claritas and the US Census American Community Survey

Analysis: Wahlstrom & Associates

Notes: (1) Dinuba includes Tulare County Census Tracts 4.01, 4.02, 5.01 and 5.02

(2) Market Area includes the Dinuba Census Tracts, the Census Tracts surrounding Dinuba, Cutler-Orosi, Orange Cove, Kingsburg, and Reedley

(3) Incomes are adjusted for inflation

Table 4
Household Income Distribution in the Dinuba Market Area
1990 - 2009

Number of Households in Each Income Bracket	< \$25k	\$25 to \$50K	\$50 to \$75K	\$75 to \$100K	\$100 to \$150K	> \$150K	Total Households
Dinuba Census Tracts (1)	1,730	1,820	1,320	490	360	170	5,890
Dinuba Market Area (2)	7,500	8,200	5,400	3,000	2,200	1,000	27,300
Tulare & Fresno Counties	111,500	116,900	77,100	47,800	40,200	25,700	419,200
Percent Total							
Dinuba Census Tracts (1)	30%	31%	22%	8%	6%	3%	
Dinuba Market Area (2)	27%	30%	20%	11%	8%	3%	
Tulare & Fresno Counties	26%	28%	18%	11%	10%	6%	

Data Sources: Claritas, US Census American Community Survey Estimates

Analysis: Wahlstrom & Associates

Notes: (1) Dinuba includes Tulare County Census Tracts 4.01, 4.02, 5.01, 5.02

(2) Market Area includes the Dinuba Census Tracts, the Census Tracts surrounding Dinuba, Cutler-Orosi, Orange Cove, Kingsburg, and Reedley

(3) Data rounded to the nearest 10 households for Dinuba and the nearest 100 households for the market area and two counties

Table 5
Taxable Sales Trends in the Dinuba Region, 2000 to 2008
(\$\$ Millions)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	Annual Growth Rates 2000 to 2006	Annual Growth Rates 2006 to 2008
Dinuba	\$124.4	\$129.4	\$135.2	\$144.1	\$152.8	\$187.4	\$208.0	\$204.9	\$175.7	8.9%	-5.5%
Kingsburg	\$59.5	\$55.5	\$52.6	\$56.6	\$57.2	\$60.0	\$62.4	\$63.9	\$63.6	0.8%	0.6%
Reedley	\$116.7	\$122.8	\$123.5	\$122.8	\$122.4	\$132.9	\$126.7	\$119.1	\$112.4	1.4%	-3.9%
Fresno (City)	\$4,566.3	\$4,679.8	\$4,958.1	\$5,249.3	\$5,587.3	\$5,943.3	\$6,003.7	\$5,686.5	\$4,932.0	4.7%	-6.3%
Visalia	\$1,252.5	\$1,257.0	\$1,313.3	\$1,356.7	\$1,477.9	\$1,603.5	\$1,619.4	\$1,562.7	\$1,385.6	4.4%	-5.1%
Tulare & Fresno Counties	\$10,008.6	\$10,408.5	\$11,055.5	\$11,932.2	\$13,145.6	\$14,605.6	\$15,521.7	\$15,162.9	\$13,739.4	7.6%	-4.0%
California	\$357,584.3	\$356,034.3	\$359,621.1	\$373,296.5	\$397,628.6	\$412,753.9	\$413,962.2	\$400,467.4	\$355,990.7	2.5%	-4.9%

Data Source: California State Board of Equalization

Analysis: Wahlstrom & Associates

Note: Data is adjusted for inflation and measured in \$2009

Table 6
Supply of Commercial Space Along the
West El Monte Way Corridor, 2010

<i>Occupied Retail Space</i>	Square Feet
Apparel	
Shoe Stores	5,400
General Merchandise Group	
General Merchandise	15,800
Warehouse Clubs & Superstores	200,200
Drug Stores	22,500
Specialty Retail Establishments	
Hobby, Toy & Game Stores	2,500
Smoke Shop	3,600
Food Stores & Restaurants	
Convenience Stores	16,300
Home Furnishings Group	
Radio, TV & other electronics	14,200
Building Materials	
Building Materials	4,500
Automotive Group	
Auto Parts	10,800
Tire Stores	4,100
Total Occupied Retail Commercial Space	299,900
<i>Food Services</i>	
Full Service Sit Down Restaurants	17,400
Pizza Delivery & Restaurants	6,100
Fast Food Restaurants & Take Out Sandwiches	15,700
Coffee Shops	2,700
Ice cream & frozen yogurt shops	1,600
Total Food Services	43,500
<i>Services</i>	
Fitness & Sports Centers	13,500
Hair, Nail & Skin Care Services & Tanning Salons	6,100
Total Personal Services	19,600
<i>Commercial Vacancies</i>	
Vacant Retail Space	27,100
Vacant Car Dealer	58,700
Vacant Commercial Retail Space	85,800
<i>Office Space</i>	
Business Office Space	6,444
Health Care Offices	8,550
Financial Services	4,500
Total Office and Financial Service Space	19,500
<i>Other Uses</i>	
Holiday Inn Express	25,000
Light Industrial	2,520
Veteran's Memorial Building	40,000
Total Other Uses	67,520
TOTAL BUILT SPACE	535,820

Data Source and Analysis: Wahlstrom & Associates Field Survey, October 2010

Table 7
Summary of Built Commercial Space in Dinuba's Commercial Areas

Type of Use	West El Monte Corridor (1)	North Alta Corridor (2)	East El Monte Corridor (3)	Downtown (4)	Total
Occupied Retail Space	299,900	151,600	333,100	129,700	914,300
Restaurants, Fast Food & Food Services	43,500	23,000	23,900	35,900	126,300
Vacant Commercial Retail	85,800	7,200	112,455	n/a	205,455
Sub Area Vacancy Rates	20%	4%	24%	n/a	16%
Total Built Commercial Space	429,200	181,800	469,455	165,600	1,246,055
Percent built space by subarea	34%	15%	38%	13%	

Source: Wahlstrom & Associates Field Survey, October 2010

Notes: Data does not measure outdoor space used by various commercial establishments
 Data was not collected on downtown's vacant commercial retail space
 Column (1) includes the Study Area between the City Limits and Alta Avenue
 Column (2) is the corridor along North Alta between El Monte and the City Limits
 Column (3) is the corridor along West El Monte between Alta and the City Limits
 Column (4) is the downtown corridor does not include office and 2nd floor space

**Table 8
Inventory of Occupied Retail Space in Dinuba, 2010**

Consumer Products	West El Monte Corridor (1)	North Alta Corridor (2)	East El Monte Corridor (3)	Downtown (4)	Total
Apparel					
Clothing Stores			10,200	19,800	30,000
Shoe Stores	5,400			3,780	9,180
Jewelry Stores			1,400	4,000	5,400
General Merchandise Group					
General Merchandise	15,800	18,000	158,400	4,500	196,700
Warehouse Clubs & Superstores	200,200				
Drug Stores	22,500	23,400	68,900		114,800
Specialty Retail Group					
Cosmetic & Beauty Stores		1,600			1,600
Sporting Goods				1,900	1,900
Hobby, Toy & Game Stores	2,500				2,500
Florists				1,400	1,400
Smoke Shop	3,600			13,400	17,000
Food Stores & Restaurants					
Supermarkets & Grocery Stores		94,500	72,000		166,500
Convenience Stores	16,300	5,400	6,000	23,200	50,900
Specialty Foods				1,800	1,800
Liquor Stores	0	4,860	4,000		8,900
Home Furnishings Group					
Furniture				26,300	26,300
Radio, TV & Other Electronics	14,200			900	15,100
Computer & Software Stores				4,100	4,100
Building Materials					
Building Materials	4,500	3,800		17,800	26,100
Automotive Group					
Auto Parts, Accessories	10,800		12,200	6,800	29,800
Tire Shops	4,100		0	0	4,100
Total Occupied Space for Consumer Product Sales	299,900	151,600	333,100	129,700	914,100

Source: Wahlstrom & Associates Field Survey, October 2010

Notes: Data does not measure outdoor space used by various commercial establishments
 Column (1) includes the Study Area between the City Limits and Alta Avenue
 Column (2) is the corridor along North Alta between El Monte and the City Limits
 Column (3) is the corridor along West El Monte between Alta and the City Limits
 Column (4) is the downtown corridor

Table 9
Estimates of Sales Earned by Business Establishments in Dinuba and the West El Monte Corridor,
2010

Store Category	Dinuba	West El Monte Corridor	Corridor % of City Total
Apparel			
Clothing Stores	\$703,000	\$0	0%
Shoe Stores	\$501,000	\$351,000	70%
Jewelry	\$366,000	\$0	0%
Luggage & Leather Goods Stores			
General Merchandise Group			
Discount Department Stores	\$17,003,000	\$0	0%
Warehouse Clubs & Supercenters	\$81,767,000	\$81,768,000	
Other General Merchandise	\$2,141,000	\$1,527,000	
Health & Personal Care Stores			
Drug Stores	\$6,182,000	\$1,939,000	31%
Cosmetic & Beauty Stores	\$134,000	\$0	0%
Sporting Goods, Hobby, Book & Music Stores			
Sporting goods	\$157,000	\$0	0%
Hobby, Toy & Game Stores	\$2,047,000	\$2,047,000	
Miscellaneous stores			
Gifts and Novelties	\$89,000	\$89,000	100%
Used Merchandise	\$570,000	\$0	0%
Pet supplies	\$419,000	\$0	0%
Smoke Shops	\$503,000	\$503,000	100%
Food Stores			
Supermarkets & Grocery Stores	\$36,413,000	\$0	0%
Meat Markets	\$342,000		
Convenience Stores	\$7,543,000	\$2,415,000	32%
Liquor Stores	\$1,149,000	\$0	0%
Home Furnishings Group			
Furniture	\$1,595,000	\$0	0%
Radio, TV & Other Electronics	\$1,146,000	\$1,094,000	95%
Computer & Software Stores	\$28,000		0%
Building Materials			
Other Building Materials	\$3,961,000	\$321,000	8%
Nurseries, Garden Centers & Florists	\$965,000	\$0	0%
Automotive Group			
Auto Parts and accessories	\$7,726,000	\$1,401,000	18%
Tire Shops	\$624,000	\$312,000	50%
Food Services & Drinking Places			
Full Service Restaurants	\$22,233,000	\$6,484,000	
Limited Services Restaurants & Cafeterias	\$10,037,000	\$4,575,000	
Ice cream & Frozen Yogurt	\$420,000	\$165,000	
Doughnut, Bagels & Bakery Shops	\$770,000	\$0	
Coffee Shops	\$280,000	\$280,000	
Other Snack Shops	\$270,000	\$0	
Drinking Places	\$423,000	\$0	
Totals	\$173,450,000	\$93,142,000	54%

Data Sources: State Board of Equalization, Dollars and Cents of Shopping Centers, Manta.com, Corporate 10K Reports, Wahlstrom & Associates, October 2010

Notes: Estimates based on retail space measurements and sales per square foot estimates benchmarked to published taxable sales data.

Data does not include sales earned by the Best Buy distribution center, which is not a retail business establishment. Data also does not include sales earned by the new Big 5 Sporting Goods store that opened after the built space data was collected

Table 10
Dinuba Spending Leakages
(\$\$ Thousand)

Store Category	Dinuba Spending (1)	Sales Captured from Households (2)	Dinuba Spending Leakages (3)
Apparel			
Clothing Stores	\$4,378	\$703	\$3,675
Shoe Stores	\$538	\$501	\$37
Jewelry	\$593	\$366	\$227
Luggage & Leather Goods Stores	\$38	\$0	\$38
General Merchandise Group			
Department Stores	\$4,251	\$0	\$4,251
Discount Stores & Warehouse Clubs	\$9,287	\$98,771	\$0
Variety Stores & Other General Merchandise	\$868	\$2,141	\$0
Health & Personal Care Stores			
Drug Stores	\$4,101	\$6,182	\$0
Cosmetic & Beauty Stores	\$209	\$135	\$75
Optical Goods Stores	\$163	\$0	\$163
Food Supplement Stores	\$98	\$0	\$98
All Other Health	\$178	\$0	\$178
Sporting Goods, Hobby, Book & Music Stores			
Sporting Goods	\$700	\$158	\$543
Hobby, Toy & Game Stores	\$317	\$2,037	\$0
Sewing, Needlework & Piece Goods	\$82	\$0	\$82
Musical Instruments & Supplies	\$114	\$0	\$114
Book Stores	\$341	\$0	\$341
Music Stores	\$72	\$0	\$72
Miscellaneous Stores			
Gift, Novelty & Souvenir Stores	\$328	\$90	\$239
Used Merchandise	\$190	\$574	\$0
Pet Supplies	\$232	\$422	\$0
Art Dealers	\$174	\$0	\$174
Tobacco Stores	\$144	\$506	\$0
Other	\$289	\$0	\$289
Food Stores			
Supermarkets & Grocery Stores	\$9,464	\$36,413	\$0
Convenience Stores	\$424	\$7,543	\$0
Meat Markets	\$116	\$342	\$0
Seafood Markets	\$37		\$37
Fruit & Vegetable Markets	\$68		\$68
Baked Goods	\$28		\$28
Candy, Ice Cream & Nuts	\$30		\$30
Other Specialty Foods	\$42		\$42
Liquor Stores	\$737	\$1,149	\$0

Table 10
Dinuba Spending Leakages
(\$\$ Thousand)

Store Category	Dinuba Spending (1)	Sales Captured from Households (2)	Dinuba Spending Leakages (3)
Home Furnishings			
Furniture	\$1,181	\$0	\$1,181
Home Furnishings	\$1,016	\$1,596	\$0
Office Supplies	\$792	\$0	\$792
Household Appliances	\$355	\$0	\$355
Consumer Electronics			
Radio, TV & Other Electronics	\$1,373	\$1,145	\$227
Computer & Software Stores	\$405	\$28	\$377
Camera & Photo Supplies	\$79	\$0	\$79
Building Materials			
Home Centers	\$2,737	\$0	\$2,737
Paint & Wallpaper Stores	\$204	\$0	\$204
Hardware Stores	\$409	\$0	\$409
Other Building Materials	\$2,372	\$3,961	\$0
Outdoor Power Equipment Stores	\$117	\$0	\$117
Nurseries, Garden Centers & Florists	\$751	\$965	\$0
Automotive Group			
Auto Parts	\$871	\$7,726	\$0
Tire Dealers	\$599	\$624	\$0
Totals	\$51,900	\$173,500	\$17,300

Data Sources: Bureau of Labor Statistics Household Spending Surveys, US Census of Retail Trade, Wahlstrom & Associates, Manta.com, and Corporate10K reports

Analysis: Wahlstrom & Associates

Notes:

Column (1) Measures Total Consumer Spending by Store Type Among Residents of Dinuba and the nearby census tracts

Column (2) Estimates Actual (Not Taxable) Sales Captured by Dinuba's Commercial Business Establishments. The estimates were benchmarked against the published taxable sales data

Column (3) Measures Net Spending Leakages by Store Type (Column 2 minus Column 1)

Table 11
Spending by Store Type Available to Capture Along the East El Monte Corridor
(\$\$ Thousand)

Store Category	Dinuba Spending Leakages (1)	Additional Available Spending from Nearby Communities (2)	Total Spending Available for Dinuba (3)
Apparel			
Clothing Stores	\$3,675	\$8,327	\$12,002
Shoe Stores	\$37	\$1,454	\$1,491
Jewelry	\$227	\$1,372	\$1,599
Luggage & Leather Goods Stores	\$38	\$102	\$140
General Merchandise Group			
Department Stores	\$4,251	\$11,484	\$15,735
Discount Stores & Warehouse Clubs	\$0	\$24,702	\$24,702
Variety Stores & Other General Merchandise	\$0	\$537	\$537
Health & Personal Care Stores			
Drug Stores	\$0	\$6,643	\$6,643
Cosmetic & Beauty Stores	\$75	\$565	\$640
Optical Goods Stores	\$163	\$441	\$604
Food Supplement Stores	\$98	\$266	\$364
All Other Health	\$178	\$482	\$660
Sporting Goods, Hobby, Book & Music Stores			
Sporting Goods	\$543	\$1,262	\$1,805
Hobby, Toy & Game Stores	\$0	\$857	\$857
Sewing, Needlework & Piece Goods	\$82	\$147	\$229
Musical Instruments & Supplies	\$114	\$308	\$422
Book Stores	\$341	\$920	\$1,261
Music Stores	\$72	\$194	\$266
Miscellaneous Stores			
Gift, Novelty & Souvenir Stores	\$239	\$591	\$830
Used Merchandise	\$0	\$343	\$343
Pet Supplies	\$0	\$418	\$418
Art Dealers	\$174	\$470	\$644
Tobacco Stores	\$0	\$415	\$415
Other	\$289	\$593	\$882
Food Stores			
Supermarkets & Grocery Stores	\$0	\$0	\$0
Convenience Stores	\$0	\$0	\$0
Meat Markets	\$0	\$149	\$149
Seafood Markets	\$37	\$99	\$136
Fruit & Vegetable Markets	\$68	\$185	\$253
Baked Goods	\$28	\$76	\$104
Candy, Ice Cream & Nuts	\$30	\$80	\$110
Other Specialty Foods	\$42	\$114	\$156
Liquor Stores	\$0	\$1,992	\$1,992

Table 11
Spending by Store Type Available to Capture Along the East El Monte Corridor
(\$\$ Thousand)

Store Category	Dinuba Spending Leakages (1)	Additional Available Spending from Nearby Communities (2)	Total Spending Available for Dinuba (3)
Home Furnishings			
Furniture	\$1,181	\$2,129	\$3,310
Home Furnishings	\$0	\$2,745	\$2,745
Office Supplies	\$792	\$2,139	\$2,931
Household Appliances	\$355	\$640	\$995
Consumer Electronics			
Radio, TV & Other Electronics	\$227	\$3,175	\$3,402
Computer & Software Stores	\$377	\$1,095	\$1,472
Camera & Photo Supplies	\$79	\$214	\$293
Building Materials			
Home Centers	\$2,737	\$7,394	\$10,131
Paint & Wallpaper Stores	\$204	\$551	\$755
Hardware Stores	\$409	\$1,104	\$1,513
Other Building Materials	\$0	\$3,353	\$3,354
Outdoor Power Equipment Stores	\$117	\$315	\$432
Nurseries, Garden Centers & Florists	\$0	\$1,063	\$1,063
Automotive Group			
Auto Parts	\$0	\$2,354	\$2,354
Tire Dealers	\$0	\$772	\$772
Totals	\$17,300	\$94,600	\$111,900

Data Sources: Bureau of Labor Statistics Household Spending Surveys, US Census of Retail Trade, Wahlstrom & Associates, Manta.com, and Corporate10K reports

Analysis: Wahlstrom & Associates

Notes

Column (1) Measures Net Spending Leakages by Store Type (See Table 10)

Column (2) Estimates the available spending that Dinuba could capture from residents of Cutler-Orosi, Reedley, Orange Cove, and Kingsburg, which factors in sales captured by businesses in the competitive market area.

Column (3) Summarizes Dinuba's spending leakages and the regional spending that could be captured by new businesses that locate along the East El Monte Corridor; assumes that Dinuba could capture 90% available spending from Cutler-Orosi, 60% from Orange Cove, and Reedley and 40% from Kingsburg

Table 12
West El Monte Corridor Retail Business Prospects

Store Type	Available Spending	Tenant Prospect	Maximum Supportable Store Size	Site Criteria
Apparel and/or Department Stores	\$27,700,000	Marshalls, Kohls, Ross, Burlington Coat Factory or other national chain stores	50,000 to 110,000 SF	Could support 1 or 2 stores depending on size and location criteria. Shopping center anchor stores or 8 acres of pads
Hardware Store	\$11,600,000	Orchard Supply or locally owned hardware. Available spending not sufficient to support Lowe's or Home Depot, which average between \$30 and 45 million per store.	30,000 to 40,000 SF	4 acre pad or shopping center tenant
Other Building Materials, Nurseries or Garden Centers*	\$5,000,000	Multiple locally owned businesses or national chain stores such as Kelly Moore Paints could be attracted	15,000 to 20,000 SF	1 acre pad or shopping center tenant
Furniture Stores	\$3,300,000	Locally owned stores or regional chains. Available spending not sufficient to support national chain stores, which average approximately \$10 million per store.	10,000 to 15,000 SF	1 acre pad or shopping center tenant
Office Supplies	\$2,900,000	Locally owned stores or regional chains. Available spending not sufficient to support national chain stores such as Office Depot or Staples, which average \$7 to \$10 million per store.	12,000 to 15,000 SF	1 acre pad or shopping center tenant
Radio, TV & Electronics	\$3,400,000	Locally owned stores or regional chains stores. Available spending not sufficient to support Best Buy, which average \$43 million per store.	10,000 to 15,000 SF	1 acre pad or shopping center tenant
Home Furnishings & Household Appliances	\$3,700,000	Locally owned stores or regional chains. Available spending not sufficient to support national chain stores, which require at least \$7 million per store.	5,000 to 10,000 SF	½ acre to 1 acre pad or shopping center tenant
Liquor Store	\$2,000,000	National or regional chain such as BevMo	6,000 to 10,000 SF	½ acre to 1 acre pad or shopping center tenant
Books, Jewelry, computer & software stores	\$4,400,000	Supporting tenants	15,000 SF	Potential Tenants needing less than 5,000 SF of space.

Source and Analysis: Wahlstrom & Associates