

value added by manufacture, with a ratio of 55 percent. The San Francisco marketing area attracted 29 percent of the new capital invested in manufacturing for the State in 1978; 62 percent of this total was spent in the San Jose area.

The San Francisco area cannot command the same degree of industrial strength as the Los Angeles area; however, most industries represented in the Los Angeles area are also represented in the San Francisco area albeit to a lesser degree. When interviewing companies in San Francisco, we concentrated primarily on those industries which are stronger in the San Francisco area than in the Los Angeles area. Consequently, we interviewed representative companies from the following industries:-

Food processing--preserved fruits and vegetables; cookies and crackers; the candy and ice cream industries; and, the wine and brandy industry. Industrials--the electronics and office equipment industries, consisting of the computer and office machine industry, and those industries that are related to or use semi-conductors.

The San Joaquin Marketing Area:

The San Joaquin marketing area, which includes Sacramento, Stockton, Modesto, Fresno, and Bakersfield, is not classified as a standard consolidated statistical area by the Bureau of the Census. (For the purpose of this report, we have constructed a composite of the area). The San Joaquin area is generally considered to be one of the State's leading industrial areas--we feel that the area should be considered in