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Introduction

Since its creation, the World Trade Center Los Angeles (WTCLA) has been a prominent source of reporting on the impacts of foreign direct investment (FDI) in the state of California, providing important data and analysis for counties across the state. Foreign direct investment comprises a critical component of the California economy, and there are few countries as integral to this system as the United Kingdom. According to our 2021 report, the UK has remained the second-largest supporter of foreign investment in California by firms and jobs supported, surpassed only by Japan. In the 33-county region that we have defined as Greater California, the United Kingdom is yet again the foremost contributor to foreign direct investment, and it is among the top three investors in the Bay Area and Southern California regions as well.

As reported in the WTCLA 2020 Foreign Direct Investment in California report, UK FDI supports 111,430 jobs in the state of California across 2,433 establishments, which paid $9.4 billion to Californian workers. Two-thirds of these jobs were located in the ten-county Southern California region, with a further twenty-eight percent of jobs located in the Bay Area. Foreign-owned enterprises (FOEs) from the United Kingdom have the highest employment concentration in two particular industry sectors: professional and business services and manufacturing, with over 33,000 and 22,000 jobs respectively. Other key sectors for the United Kingdom include retail trade, transportation, warehousing and utilities, and leisure and hospitality.

Since our last report, trade and investment in the state of California has been challenged, as the COVID-19 pandemic and its economic stresses have taken their toll for the past year and a half. Overall, the number of workers in California employed by FOEs fell from 730,648 to 703,187 and the number of foreign-owned enterprises decreased from 18,718 to 18,451 between the 2020 and 2021 reports. Although the United Kingdom remains the second-largest investor nation by both employment and number of firms in the state, it was not immune to the effects of the pandemic. Employment by UK FOEs declined by about 10 percent year-over-year, compared to a 3.7 percent decrease across all FOE employment in California. The value of bilateral trade in goods between these two sources, valued at $11.5 billion in 2019, dropped to just $8.7 billion in 2020.

However, it is likely that as the recovery process continues, more business opportunities will become available and more jobs will return, as the strength of the relationship between the United Kingdom and California remains strong. Businesses from the United Kingdom play a significant role across a wide range of industries in California, from companies like Deloitte, HSBC and Experian in the business and information space to Princess Cruise Lines and Six Continents Hotels in the tourism and hospitality sectors. In this report, the WTCLA has once again partnered with the Consulate General of the United Kingdom in Los Angeles to illustrate the economic ties between California and the United Kingdom 2021. The report includes an updated look at the industry sectors occupied most prominently by UK foreign-owned enterprises, county-level business and geographic analysis for the locations with the highest level of investment and a rundown of major businesses from the United Kingdom that operate in California counties.
There are 2,380 foreign-owned enterprises from the United Kingdom located in the Golden State, residing in 45 different counties.

Over 1,300 of these firms are located in the Southern California region, accounting for 66.9 percent of UK FOE employment. Another 830 firms operate within the fifteen-county Bay Area region and command a further 28 percent of employment. Over 200 enterprises have located in Greater California and account for over 5,000 FOE jobs; while this region represents the smallest proportion of firms and jobs supported, the United Kingdom is the greatest investor of any foreign country in Greater California.

REGIONAL BREAKDOWN
This year’s report continues the practices established in the previous report on foreign direct investment from the United Kingdom, by breaking the counties of California into three major regions. The breakdown of these regions is illustrated in the map above.
Foreign-owned enterprises and their employment by industry and geography.

**UNITED KINGDOM**
FOREIGN-OWNED ENTERPRISES (FOEs)

| FOE JOBS | 100,231 | FOE FIRMS | 2,380 | ESTIMATED WAGES ($ MILLIONS) | $8,888 |

**UK FOE JOBS BY SECTOR**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale Trade</td>
<td></td>
</tr>
<tr>
<td>Financial Activities</td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td></td>
</tr>
<tr>
<td>Leisure/Hospitality</td>
<td></td>
</tr>
<tr>
<td>Transportation, Warehousing &amp; Utilities</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
</tr>
<tr>
<td>Prof./Business Services</td>
<td></td>
</tr>
</tbody>
</table>

**UK FOE Jobs by California Region**

<table>
<thead>
<tr>
<th>County</th>
<th>Jobs</th>
<th>% of All FOE Jobs</th>
<th>Firms</th>
<th>Est. Wages ($Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay Area</td>
<td>28,105</td>
<td>28.0%</td>
<td>830</td>
<td>2,692.9</td>
</tr>
<tr>
<td>Southern California</td>
<td>67,069</td>
<td>66.9%</td>
<td>1,321</td>
<td>5,743.1</td>
</tr>
<tr>
<td>Greater California</td>
<td>5,057</td>
<td>5.0%</td>
<td>229</td>
<td>451.9</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>100,231</td>
<td>100%</td>
<td>2,380</td>
<td>8,888.0</td>
</tr>
</tbody>
</table>
TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Professional and Business Services, UK

- Orange: 11,624
- Los Angeles: 8,405
- San Francisco: 4,145
- Santa Clara: 2,954
- San Diego: 2,067
- Alameda: 1,247
- Riverside: 668
- San Mateo: 619
- El Dorado: 342
- Sacramento: 335
- Rest of California: 1,568

TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Manufacturing, UK

- San Diego: 5,404
- Orange: 2,904
- Ventura: 2,708
- Los Angeles: 2,568
- Santa Clara: 2,166
- Alameda: 1,359
- San Bernadino: 1,123
- Kern: 1,044
- Contra Costa: 630
- San Benito: 403
- Rest of California: 2,083
TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Retail Trade, UK

Top 10 Counties:

- Los Angeles: 2,672
- San Diego: 2,568
- Alameda: 815
- Contra Costa: 486
- Kern: 409
- Santa Clara: 321
- Sacramento: 277
- San Bernardino: 158
- Rest of California: 146
- Fresno: 99

TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Transportation, Warehousing and Utilities, UK

Top 10 Counties:

- Los Angeles: 3,867
- San Mateo: 999
- Contra Costa: 521
- Orange: 347
- San Francisco: 293
- Santa Clara: 280
- San Joaquin: 262
- Fresno: 261
- San Bernadino: 250
- Riverside: 205
- Rest of California: 1,004
TOP 10 COUNTIES FOR FOEs IN Leisure and Hospitality, UK

<table>
<thead>
<tr>
<th>County</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>1,788</td>
</tr>
<tr>
<td>San Francisco</td>
<td>1,724</td>
</tr>
<tr>
<td>Orange</td>
<td>1,009</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>817</td>
</tr>
<tr>
<td>San Diego</td>
<td>338</td>
</tr>
<tr>
<td>Alameda</td>
<td>224</td>
</tr>
<tr>
<td>San Mateo</td>
<td>150</td>
</tr>
<tr>
<td>Sacramento</td>
<td>137</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>122</td>
</tr>
<tr>
<td>Riverside</td>
<td>83</td>
</tr>
<tr>
<td>Rest of California</td>
<td>304</td>
</tr>
</tbody>
</table>

TOP SUB-INDUSTRIES FOR INVESTMENT

Below the top-level industries are smaller subindustries into which individual businesses are classified based on their function. The top five subindustries for investment from UK foreign-owned enterprises are as shown in the following exhibit.

CREDIT BUREAUS comprises establishments primarily engaged in compiling information, such as credit and employment histories, and providing the information to financial institutions, retailers, and others who have a need to evaluate the creditworthiness of individuals and businesses. In California, the largest such firm from the United Kingdom is Experian Information Solutions.

OTHER GASOLINE STATIONS comprises establishments known as gasoline stations (except those with convenience stores) primarily engaged in retailing automotive fuels or retailing these fuels in combination with activities, such as providing repair services, selling automotive oils, replacement parts, and accessories or providing food services. This includes major corporations such as British Petroleum which has a significant footprint in the Golden State.

HOTELS (EXCEPT CASINO HOTELS) AND MOTELS comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels, and motels. The establishments in this industry may offer food and beverage services, recreational services, conference rooms, convention services, laundry services, parking, and other services. The most prominent UK firm located in California from this subindustry is Six Continents Hotels.

TOP 5 SUB-INDUSTRIES FOR INVESTMENT by Employment

<table>
<thead>
<tr>
<th>Industry</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Bureaus</td>
<td>8,680</td>
</tr>
<tr>
<td>Other Gasoline Stations</td>
<td>4,940</td>
</tr>
<tr>
<td>Hotels (except Casino Hotels) and Motels</td>
<td>3,750</td>
</tr>
<tr>
<td>Search, Detection, Navigation, Guidance</td>
<td>2,860</td>
</tr>
<tr>
<td>Aeronautical, and Nautical System and Instrument Manufacturing</td>
<td>2,750</td>
</tr>
<tr>
<td>School and Employee Bus Transportation</td>
<td>2,750</td>
</tr>
</tbody>
</table>
Los Angeles County is the top destination for foreign investment from the United Kingdom, with 25,615 jobs supported across 575 firms, with an estimated $2.3 billion in labor income earned. Los Angeles County holds over a quarter of the total jobs supported by UK FDI, with the highest concentrations of employment in professional and business services, transportation, warehousing and utilities, retail trade and manufacturing. As the home of major import and export hubs such as the Ports of Los Angeles and Long Beach and Los Angeles International Airport, it is understandable that this county maintains a major presence from UK FOEs. A full breakdown of employment is given in the following charts.
TOP 10 UK EMPLOYERS IN LOS ANGELES COUNTY

Princess Cruise Lines, Ltd. ............................................. 3,128
HSBC Finance Corporation ........................................ 1,245
Deloitte & Touche LLP .................................................. 1,000
BP West Coast Products LLC ....................................... 620
Infonet Services Corporation .................................... 600
Essense ........................................................................ 582
BP America Inc ............................................................. 500
The Nielsen Company US LLC .................................. 480
Durham School Services, L. P. .................................... 453
Six Continents Hotels, Inc ........................................... 447

UK Foreign Direct Investment Locations within Los Angeles County

This density map shows the concentration of UK FOEs in Los Angeles County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. We can see that the most dense clusters of FOEs in the county reside in downtown Los Angeles and the beachfronts from Santa Monica towards Marina Del Rey and Manhattan Beach, where there is heavy activity in professional and business services.
Orange County
OVERVIEW

In total, foreign direct investment from the United Kingdom is responsible for 20,860 jobs across 209 firms in Orange County, making it the second-largest location for investment. Orange County joins Los Angeles County as the only two locations where FOE employment numbers in the tens of thousands, with all other counties falling far behind. UK firms are invested heavily in professional and business services here, with 56 percent of employment in this sector. Manufacturing and retail trade also command notable shares of employment and overall firm count, with all other industries combined only supporting 17 percent of FOE employment in Orange County.

UK FOEs IN ORANGE COUNTY
by Industry

UK FOE EMPLOYMENT IN ORANGE COUNTY
by Industry
This density map shows the concentration of UK FOEs in Orange County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The densest cluster of foreign firms is around the major city of Irvine, a hub for business and professional services in Orange County. There are also smaller concentrations around other cities such as Anaheim, Orange, Santa Ana and Mission Viejo.

### TOP 10 UK EMPLOYERS IN ORANGE COUNTY

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experian Corporation</td>
<td>4,553</td>
</tr>
<tr>
<td>Experian Information Solutions, Inc.</td>
<td>3,920</td>
</tr>
<tr>
<td>Atlantic Richfield Company Inc.</td>
<td>2,200</td>
</tr>
<tr>
<td>Deloitte Consulting LLP</td>
<td>800</td>
</tr>
<tr>
<td>Compass Group Usa, Inc.</td>
<td>767</td>
</tr>
<tr>
<td>Deloitte &amp; Touche LLP</td>
<td>700</td>
</tr>
<tr>
<td>Smiths Detection Inc.</td>
<td>609</td>
</tr>
<tr>
<td>Sage Software Holdings, Inc.</td>
<td>400</td>
</tr>
<tr>
<td>Edwards Theatres Circuit, Inc.</td>
<td>366</td>
</tr>
<tr>
<td>Control Components Inc.</td>
<td>365</td>
</tr>
</tbody>
</table>
San Diego County
OVERVIEW

San Diego County accounts for the third largest share of employment supported by foreign direct investment from the United Kingdom, with 9,440 employees across 232 firms. The strength of FOE employment in San Diego County lies in manufacturing, with over 5,400 workers participating in everything from medical equipment manufacturing to aerospace and defense. While the greatest number of firms are present in the professional and business services industry, this only accounts for 22 percent of overall employment. Meanwhile, all other sectors in San Diego have notably low shares of foreign firms and employment.

UK FOEs IN SAN DIEGO COUNTY
by Industry

UK FOE EMPLOYMENT IN SAN DIEGO COUNTY
by Industry
This density map shows the concentration of UK FOEs in San Diego County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. As expected, the density of establishments is greatest in the city of San Diego, where there is a major cluster of enterprises from the United Kingdom. A secondary concentration is located north in the Torrey Pines and Carmel Valley area, with a third slightly northeast around the cities of Santee and El Cajon.
San Francisco County
OVERVIEW

he first county not located within the Southern California region, San Francisco County is the strength of the Bay Area when it comes to FDI from the United Kingdom, with 8,080 employees and 205 firms. San Francisco County is similar to Orange County in that the majority of FOE employment comes from the professional and business services sector, with its 97 firms employing 51 percent of workers. This speaks to the lasting image of San Francisco’s strength in California when it comes to financial and business activities. The leisure and hospitality is second largest by employment figures, with over 1,700 workers supported by firms from the UK. Trade and manufacturing, which had been key sources of employment in the three largest counties, are much less of an emphasis in San Francisco County.

UK FOEs IN SAN FRANCISCO COUNTY
by Industry

UK FOE EMPLOYMENT IN SAN FRANCISCO COUNTY
by Industry
This density map shows the concentration of UK FOEs in San Francisco County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. There is an extremely dense cluster of firms in the Financial District of San Francisco, which is to be expected given that half of FOE employment in this county resides in professional and business services. There are other sparser clusters of firms located around the city as well, but the vast majority of investment is concentrated in this northeast corner of the city.
Santa Clara County

OVERVIEW

Santa Clara County is the fifth most invested in region by firms from the United Kingdom. In total, its 180 firms support 7,940 employees. As would be expected, professional and business services is the most prominent sector in this county with nearly 3,000 jobs supported; Santa Clara County is a nexus for this sector due to the importance of Silicon Valley and nearby schools like Stanford University. However, foreign firms also have a strong base in manufacturing here, with 20 firms supporting over 2,000 workers. These two sectors combine for roughly 64 percent of total FOE employment.

UK FOEs IN SANTA CLARA COUNTY

by Industry

UK FOE EMPLOYMENT IN SANTA CLARA COUNTY

by Industry
This density map shows the concentration of UK FOEs in Santa Clara County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The densest cluster of establishments is centered around the city of San Jose, the largest hub for business and finance in the region. A smaller concentration is located in the northwest corner of the county around Palo Alto, home to Silicon Valley and a wide range of the world’s most prominent corporations.
Alameda County
OVERVIEW

Alameda County, located to the east of San Francisco County and northeast of Santa Clara County, is the seventh most populous county in the state and sixth largest in terms of foreign investment from UK firms. The county has an interesting mix of foreign involvement: 35 firms in professional and business services contributing roughly 1,250 jobs, eight manufacturing firms that support over 1,300 workers (the highest proportion of employment by sector in the county) and 36 retail trade firms with slightly over 800 workers. After these three sectors, UK FOEs have a relatively small footprint in Alameda County. In total, Alameda supports about 4,190 workers across 126 firms from the United Kingdom.
This density map shows the concentration of UK FOEs in Alameda County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. Firms are concentrated in clusters along the two major freeways that run through the region, the 880 running north to south and the 580 traveling to the eastern side of the county. The largest city of Oakland has the greatest density of firms, with smaller concentrations around San Leandro and Dublin.
Ventura County
OVERVIEW

Ventura County is located to the northwest of Los Angeles County along the Pacific Coast, and supports 3,330 employees within 66 foreign-owned enterprises from the United Kingdom. The story of foreign direct investment in Ventura County is a short one, as manufacturing accounts for 81 percent of this employment and nearly a third of the firms. Most of these workers are involved in computer and electronic manufacturing or machinery manufacturing, which are both among California’s top exports to the United Kingdom. Of the remaining workers, the greatest proportion lies in the professional and business services sector with about eight percent of employment.
This density map shows the concentration of UK FOEs in Ventura County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The cities along the 110 freeway enjoy the highest density of firms from the United Kingdom, including locations like Thousand Oaks, Ventura and Oxnard. The remainder of the county is taken up by Los Padres National Forest in the north, where there are no establishments of any kind.
San Mateo County

OVERVIEW

San Mateo County, another key component of the Bay Area region, is home to 71 foreign-owned enterprises from the United Kingdom with 3,100 jobs. San Mateo differs from its counterparts on this list as its heaviest employment concentrations are in transportation, warehousing and utilities with 1,000 workers and information with 850 workers. In contrast to the other major counties, professional and business services has only the third most employees supported by UK FDI and manufacturing plays a minor role. When combined with the strengths of San Francisco, Santa Clara and Alameda counties however, San Mateo contributes some new faces to the diverse group of industries that UK FOEs do business in across the Bay Area region.

UK FOEs IN SAN MATEO COUNTY

by Industry

UK FOE EMPLOYMENT IN SAN MATEO COUNTY

by Industry
TOP 10 UK EMPLOYERS IN SAN MATEO COUNTY

Aeroground, Inc. ................................................................. 800
Genesys Telecommunications Laboratories, Inc. ........ 450
Sage Software, Inc. .......................................................... 245
Isheriff, Inc. .......................................................................... 235
Vindicia, Inc. ........................................................................ 135
Bon Appetit Management Co. ........................................... 120
First Student, Inc. ............................................................. 83
Ensignen, Inc. ................................................................. 79
Signature Flight Support Corporation ............................... 76
Barclays Capital Inc. .......................................................... 70

UK Foreign Direct Investment Locations within San Mateo County

This density map shows the concentration of UK FOEs in San Mateo County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The firms are densest in the cities along the coast, where major freeways provide easy transit from San Francisco to San Jose and everywhere in between. In particular, we can see locations in Redwood City, San Mateo, South San Francisco and Palo Alto. The southern reaches of the county, which are reserved for state parks and natural preserves, have no investment locations.
Kern County
OVERVIEW

Kern County is located in the northernmost reaches of the Southern California region, and makes up a large proportion of the agricultural base of the Golden State. As a result, Kern’s highest proportion of employment from UK FOEs comes from the natural resources sector, which includes farming and agriculture; overall six firms in this sector employ over 1,100 workers. Kern County’s other strength is in manufacturing, where six firms from the United Kingdom support a further 1,000 employees. Other smaller concentrations of employees are present in retail trade, professional and business services and leisure and hospitality. In total, firms from the United Kingdom have 32 locations in Kern County with 3,030 total workers supported.
This density map shows the concentration of UK FOEs in Kern County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The population of Kern County is quite dispersed, and as a result there is only one major concentration of UK FOEs, located in the city of Bakersfield. Aside from a few individual locations throughout the county, there are no other dense areas for investment.
rounding out the top ten counties for UK investment is San Bernardino County, located to the east of Los Angeles County. San Bernardino has 81 firms from the United Kingdom with 2,230 employees. 50 percent of employment lies in the manufacturing sector, while the three sectors of transportation, warehousing and utilities, professional and business services and leisure and hospitality comprise another 31 percent.

UK FOEs IN SAN BERNARDINO COUNTY by Industry

- Natural Resources
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation, Warehousing and Utilities
- Information
- Financial Activities
- Professional and Business Services
- Education and Healthcare
- Leisure and Hospitality
- Other (Personal Services)
- Government

UK FOE EMPLOYMENT IN SAN BERNARDINO COUNTY by Industry

- 0% - Natural Resources
- 0% - Construction
- 50% - Manufacturing
- 7% - Wholesale Trade
- 7% - Retail Trade
- 11% - Transportation, Warehousing and Utilities
- 1% - Information
- 2% - Financial Activities
- 10% - Professional and Business Services
- 0% - Education and Healthcare
- 10% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government
This density map shows the concentration of UK FOEs in San Bernardino County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. There are dense clusters of UK FOEs in the southwest corner of the county, which borders the greater Los Angeles metropolitan area, but there is scarce investment anywhere else across the 20,000 square miles of the county.

TOP 10 UK EMPLOYERS IN SAN BERNADINO COUNTY

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jacuzzi Products Co.</td>
<td>620</td>
</tr>
<tr>
<td>Amcor Rigid Packaging USA, LLC</td>
<td>175</td>
</tr>
<tr>
<td>First Student, Inc.</td>
<td>140</td>
</tr>
<tr>
<td>Six Continents Hotels, Inc.</td>
<td>128</td>
</tr>
<tr>
<td>Bon Appetit Management Co.</td>
<td>120</td>
</tr>
<tr>
<td>Jacuzzi Inc.</td>
<td>110</td>
</tr>
<tr>
<td>Jacuzzi Brands LLC</td>
<td>101</td>
</tr>
<tr>
<td>Bunzl Retail Services, LLC</td>
<td>87</td>
</tr>
<tr>
<td>Menzies Aviation (texas), Inc.</td>
<td>63</td>
</tr>
<tr>
<td>Sundance Spas, Inc.</td>
<td>60</td>
</tr>
</tbody>
</table>
The United Kingdom has foreign-owned enterprises supporting workers in 45 California counties. For the top ten counties, a detailed analysis of industries and employers appears in the previous section of this report. For the 11th through 25th ranked counties by FOE employment, the top three employers in each county from the United Kingdom are listed in this section to provide a brief insight into the presence of foreign direct investment in these locations.
TOP 3 EMPLOYERS IN NAPA COUNTY (#16)
Diageo North America Inc. ........................................ 180
Amcor Flexibles LLC ........................................... 135
Codorniu Napa, Inc. .............................................. 89

TOP 3 EMPLOYERS IN BUTTE COUNTY (#17)
Build.com, Inc. .................................................. 380
Morrison Management Specialists, Inc. ...................... 97
Ferguson Enterprises, LLC .................................... 26

TOP 3 EMPLOYERS IN SAN JOAQUIN COUNTY (#18)
First Student, Inc. .............................................. 200
Greyhound Lines, Inc. .......................................... 50
Bunzl Usa, Inc. .................................................. 45

TOP 3 EMPLOYERS IN SANTA BARBARA COUNTY (#19)
Six Continents Hotels, Inc ..................................... 65
Edwards Theatres Circuit, Inc. .................................. 62
Oxford Instruments Asylum Research Inc. .................. 55

TOP 3 EMPLOYERS IN EL DORADO COUNTY (#20)
Amdocs, Inc. ..................................................... 336
Regal Cinemas, Inc. ............................................. 49
Ferguson Enterprises, LLC .................................... 13

TOP 3 EMPLOYERS IN SAN BENITO COUNTY (#21)
Mc Electronics, LLC ........................................... 399
Ferguson Enterprises, LLC .................................... 8
BAE Systems Land & Armaments L.P. ....................... 4

TOP 3 EMPLOYERS IN SANTA CRUZ COUNTY (#25)
Oxford Instruments X-Ray Technology, Inc. .............. 69
Cushman & Wakefield, Inc. ................................... 55
Regal Cinemas, Inc. ............................................. 30
BILATERAL GOODS TRADE

Between California and the United Kingdom

ilateral goods movement between the United Kingdom and California is an important factor in the state economy, contributing billions of dollars in value annually. Although the pandemic has depressed trade volumes in 2020 and 2021, from 2016 to 2019 the value of bilateral trade between these two sources reached at or above $10 billion each year. It should be noted that while the bilateral trade of goods is an important measure, the trade in services between the United Kingdom and California represents an even larger volume. It was estimated that in 2019, the total value of California services exports to the UK more than tripled the value of California goods exports to the country.

When compared to global trade volumes of goods in and out of California, the pandemic had a much greater effect on imports from the United Kingdom than it did on imports overall; import levels into the Golden State remained rather consistent in 2020, despite the significant decreases from the UK. Meanwhile, exports from California to the United Kingdom remained rather stable throughout 2020, as export volumes to the rest of the world fell off to a greater degree. The historical stability of trade to
and from the Golden State and the United Kingdom suggests that trade volumes will again attain their previous measures over the next few years as the economic effects of the pandemic subside.

As of September 2021, the top industry for exports from California to the United Kingdom was computer and electronic products, with a trade value of over $800 million through three quarters of the year; this export has consistently brought in over $1 billion annually for California. Meanwhile, transportation equipment, which had been the top export industry a year prior and grew by 74 percent in value from 2018 to 2020, has experienced a dramatic decline this year with just $266 million in trade value at the end of the third quarter – compared to nearly $800 million through the third quarter of 2020. Chemicals, miscellaneous manufactured commodities and machinery (except electrical) round out the top five exports to the United Kingdom. This year, the top ten exports from California have contributed $2.9 billion in trade value through September 2021, down roughly 8 percent from the previous year.

<table>
<thead>
<tr>
<th>NAICS Category</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>YTD(SEP) 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>334) Computer and Electronic Products</td>
<td>$1,637,302,000</td>
<td>$1,317,109,000</td>
<td>$1,121,423,000</td>
<td>$819,682,000</td>
</tr>
<tr>
<td>325) Chemicals</td>
<td>$454,211,000</td>
<td>$453,882,000</td>
<td>$596,772,000</td>
<td>$594,696,000</td>
</tr>
<tr>
<td>336) Transportation Equipment</td>
<td>$659,554,000</td>
<td>$774,892,000</td>
<td>$1,136,740,000</td>
<td>$266,948,000</td>
</tr>
<tr>
<td>339) Miscellaneous Manufactured Commodities</td>
<td>$359,345,000</td>
<td>$412,511,000</td>
<td>$305,268,000</td>
<td>$219,162,000</td>
</tr>
<tr>
<td>333) Machinery, Except Electrical</td>
<td>$309,437,000</td>
<td>$287,560,000</td>
<td>$237,839,000</td>
<td>$212,776,000</td>
</tr>
<tr>
<td>930) Used or Second-Hand Merchandise</td>
<td>$380,403,000</td>
<td>$580,820,000</td>
<td>$393,616,000</td>
<td>$209,547,000</td>
</tr>
<tr>
<td>312) Beverages &amp; Tobacco Products</td>
<td>$214,293,000</td>
<td>$227,561,000</td>
<td>$234,072,000</td>
<td>$148,428,000</td>
</tr>
<tr>
<td>335) Electrical Equipment, Appliances and Components</td>
<td>$236,238,000</td>
<td>$227,662,000</td>
<td>$173,775,000</td>
<td>$146,809,000</td>
</tr>
<tr>
<td>332) Fabricated Metal Products; NESOI</td>
<td>$238,775,000</td>
<td>$237,580,000</td>
<td>$154,714,000</td>
<td>$141,591,000</td>
</tr>
<tr>
<td>111) Agricultural Products</td>
<td>$191,153,000</td>
<td>$201,650,000</td>
<td>$195,589,000</td>
<td>$140,530,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$4,680,711,000</strong></td>
<td><strong>$4,721,227,000</strong></td>
<td><strong>$4,549,808,000</strong></td>
<td><strong>$2,900,169,000</strong></td>
</tr>
</tbody>
</table>
In terms of goods imports from the United Kingdom to California, the top industry remains transportation equipment. Similarly to exports, the trade volume of this industry fell rapidly in 2020, and the trade value through three quarters of 2021 is lower than it had been in the prior year, at just $812 million compared to $1.1 billion. Computer and electronic products and machinery (except electrical) are the other two import industries in the top three; both experienced drops in trade value due to the pandemic but are outpacing their performance of the prior year through three quarters of 2021. Chemicals and miscellaneous manufactured commodities actually performed better in 2020 and 2019, and this growth in trade value has continued into 2021. The top five industries for export and import are exactly the same between the United Kingdom and California, and the strength of this relationship will be extremely beneficial as trade volumes recover over time.

### Top 10 Imports Commodities by NAICS Category

<table>
<thead>
<tr>
<th>NAICS Category</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>YTD(SEP) 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>336) Transportation Equipment</td>
<td>$2,800,566,000</td>
<td>$3,187,365,000</td>
<td>$1,392,575,000</td>
<td>$812,176,000</td>
</tr>
<tr>
<td>334) Computer and Electronic Products</td>
<td>$488,900,000</td>
<td>$473,096,000</td>
<td>$404,094,000</td>
<td>$339,508,000</td>
</tr>
<tr>
<td>333) Machinery, Except Electrical</td>
<td>$339,899,000</td>
<td>$357,641,000</td>
<td>$335,689,000</td>
<td>$269,913,000</td>
</tr>
<tr>
<td>325) Chemicals</td>
<td>$220,886,000</td>
<td>$239,210,000</td>
<td>$258,452,000</td>
<td>$215,916,000</td>
</tr>
<tr>
<td>339) Misc. Manufactured Commodities</td>
<td>$125,474,000</td>
<td>$131,071,000</td>
<td>$174,257,000</td>
<td>$202,973,000</td>
</tr>
<tr>
<td>980) Goods RET to CA (Exp); US Goods RET &amp; REIMPS (IMP)</td>
<td>$303,150,000</td>
<td>$386,661,000</td>
<td>$230,102,000</td>
<td>$158,841,000</td>
</tr>
<tr>
<td>335) Electrical Equip.; Appliances &amp; Components</td>
<td>$225,355,000</td>
<td>$251,380,000</td>
<td>$192,747,000</td>
<td>$146,648,000</td>
</tr>
<tr>
<td>930) Used or Second-Hand Merchandise</td>
<td>$220,496,000</td>
<td>$400,299,000</td>
<td>$125,721,000</td>
<td>$137,728,000</td>
</tr>
<tr>
<td>312) Beverages &amp; Tobacco Products</td>
<td>$303,708,000</td>
<td>$277,507,000</td>
<td>$173,521,000</td>
<td>$106,505,000</td>
</tr>
<tr>
<td>324) Petroleum &amp; Coal Products</td>
<td>$27,660,000</td>
<td>$156,315,000</td>
<td>$43,146,000</td>
<td>$78,371,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$5,056,094,000</strong></td>
<td><strong>$5,860,545,000</strong></td>
<td><strong>$3,330,304,000</strong></td>
<td><strong>$2,468,579,000</strong></td>
</tr>
</tbody>
</table>
United Kingdom Foreign Direct Investment in California

IN PARTNERSHIP WITH THE BRITISH CONSULATE GENERAL IN LOS ANGELES