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Consulate-General
Los Angeles



WORLD TRADE CENTER®
LOS ANGELES

United Kingdom Foreign Direct Investment in California

IN PARTNERSHIP WITH THE BRITISH
CONSULATE GENERAL IN LOS ANGELES





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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.

California Overview

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

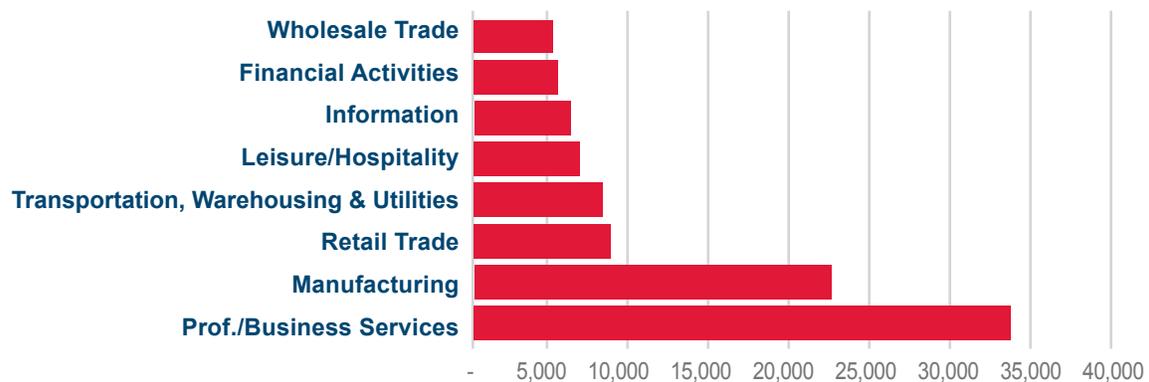
FOE FIRMS

2,380

ESTIMATED WAGES (\$ MILLIONS)

\$8,888

UK FOE JOBS BY SECTOR

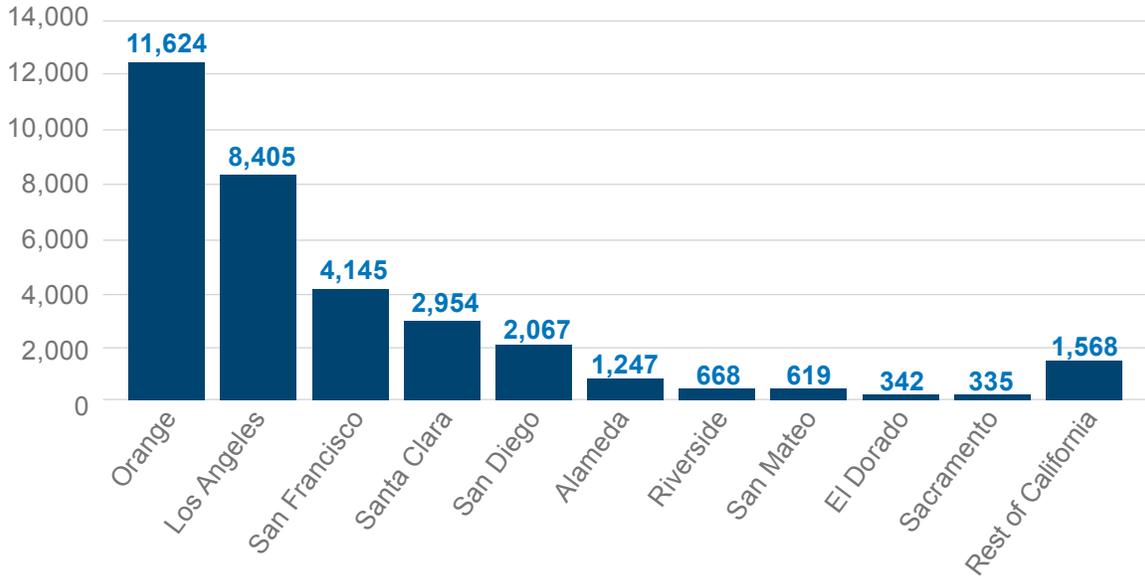


UK FOEs BY CALIFORNIA REGION

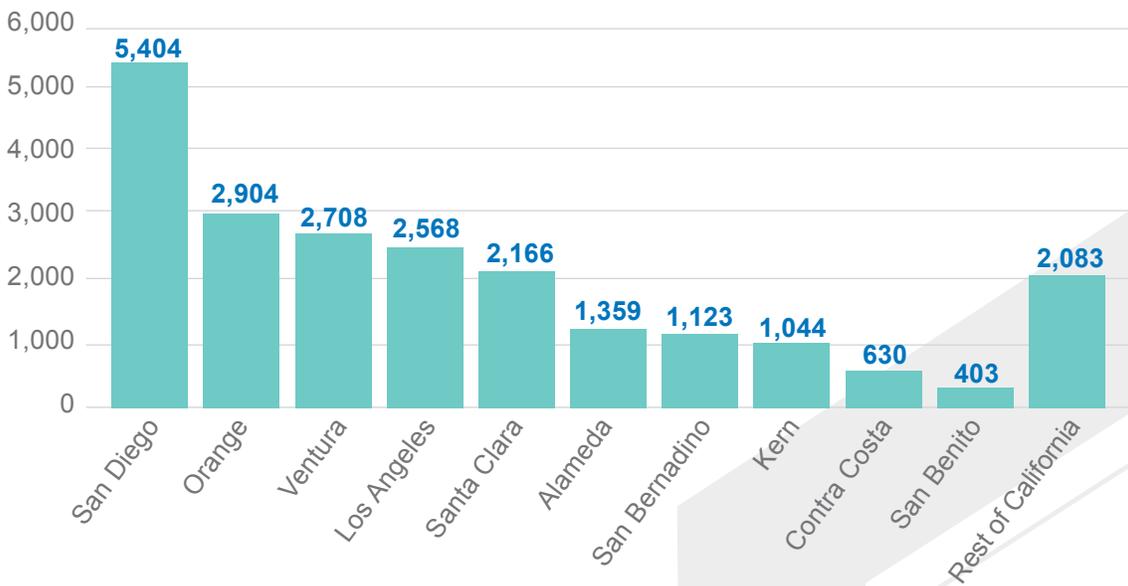
County	Jobs	% of All FOE Jobs	Firms	Est. Wages (\$Millions)
Bay Area	28,105	28.0%	830	2,692.9
Southern California	67,069	66.9%	1,321	5,743.1
Greater California	5,057	5.0%	229	451.9
TOTAL	100,231	100%	2,380	8,888.0



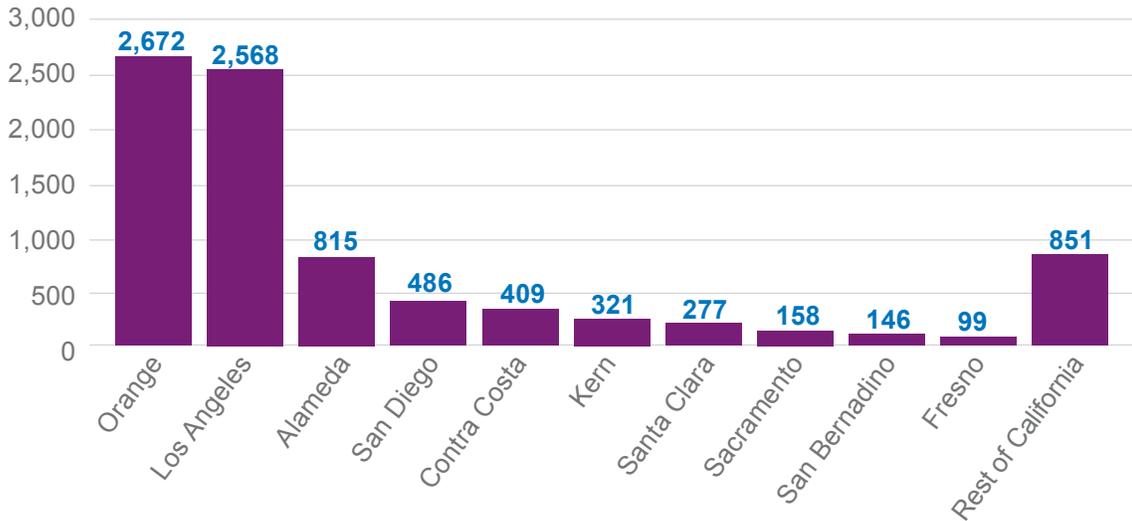
TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Professional and Business Services, UK



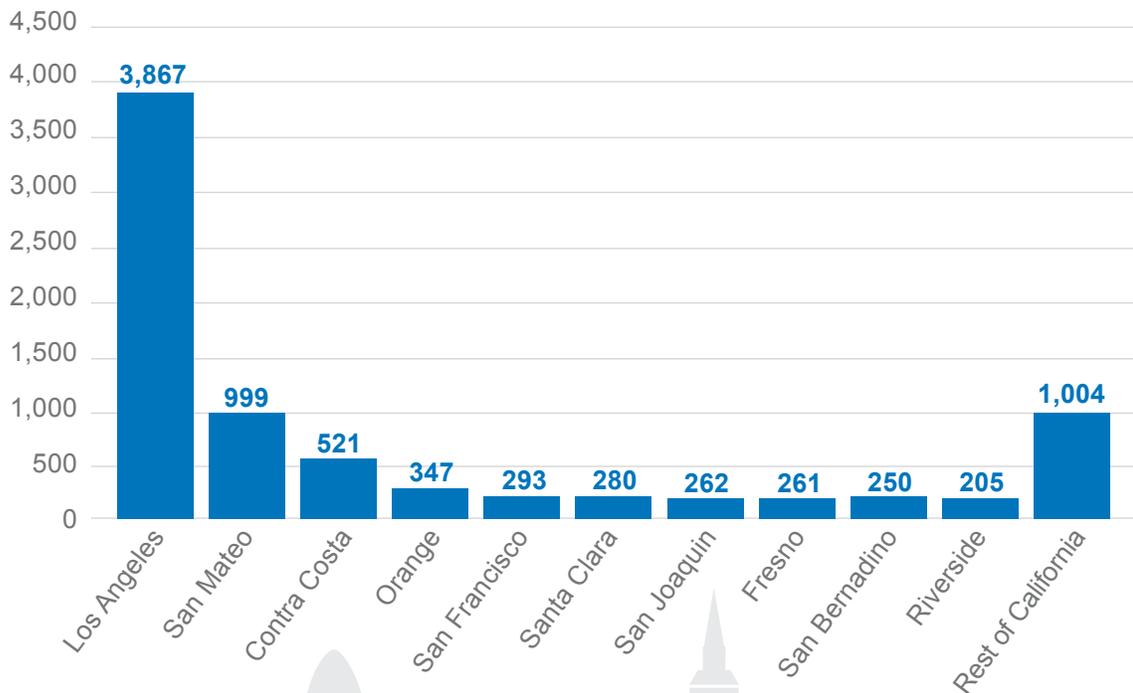
TOP 10 COUNTIES FOR FDI EMPLOYMENT IN Manufacturing, UK



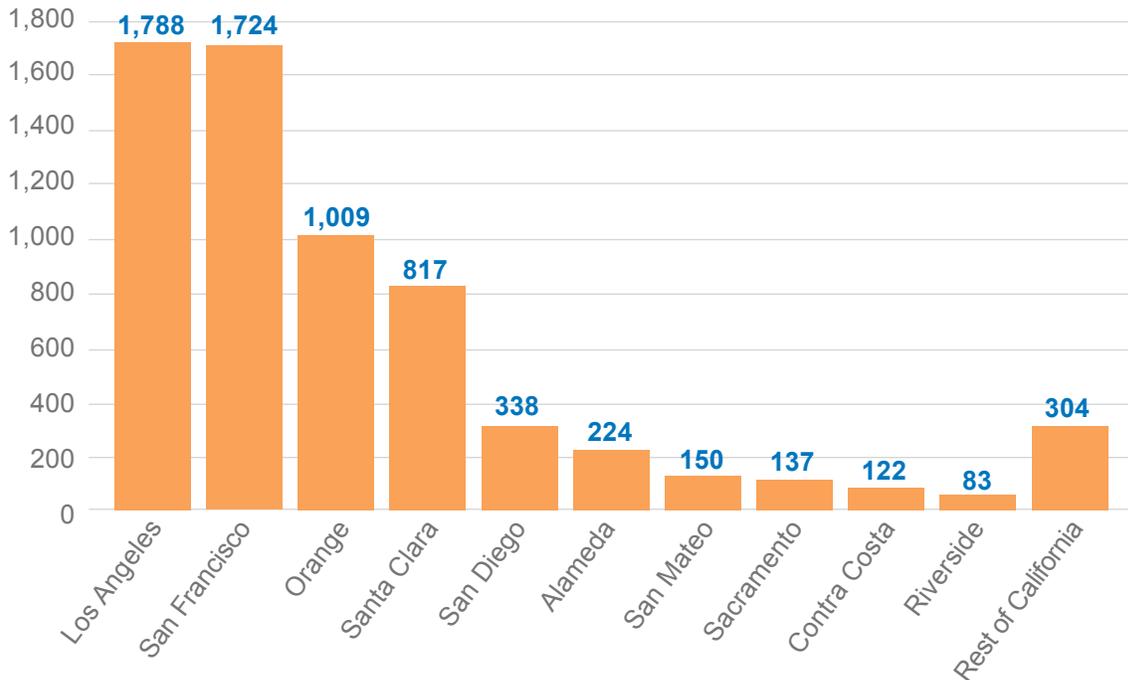
TOP 10 COUNTIES FOR FOE EMPLOYMENT IN Retail Trade, UK



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



TOP 10 COUNTIES FOR FOEs IN Leisure and Hospitality, UK



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

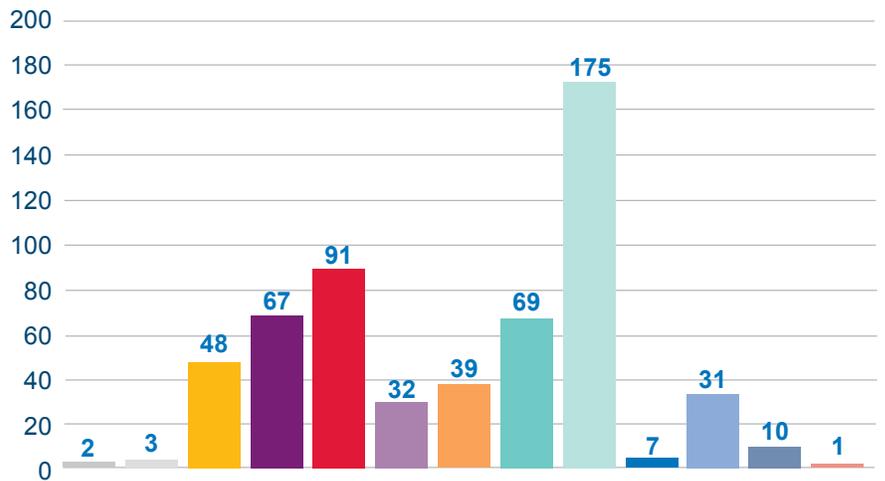
Credit Bureaus	8,680
Other Gasoline Stations	4,940
Hotels (except Casino Hotels) and Motels	3,750
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	2,860
School and Employee Bus Transportation	2,750

Los Angeles County OVERVIEW

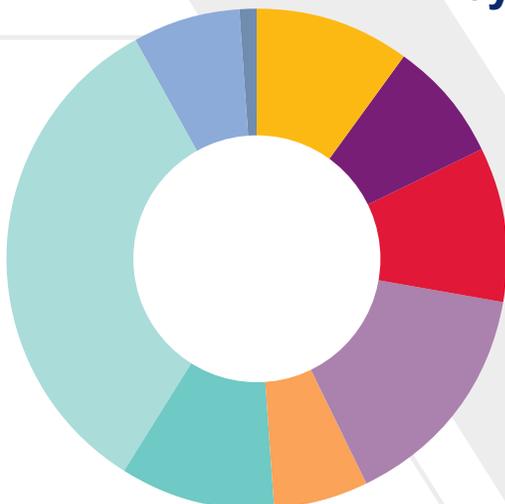
Los Angeles County is the top destination for foreign investment from the United Kingdom, with 25,615 jobs supported across 575 firms, with an estimated \$2.3 billion in labor income earned. Los Angeles County holds over a quarter of the total jobs supported by UK FDI, with the highest concentrations 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.

UK FOEs IN LA 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



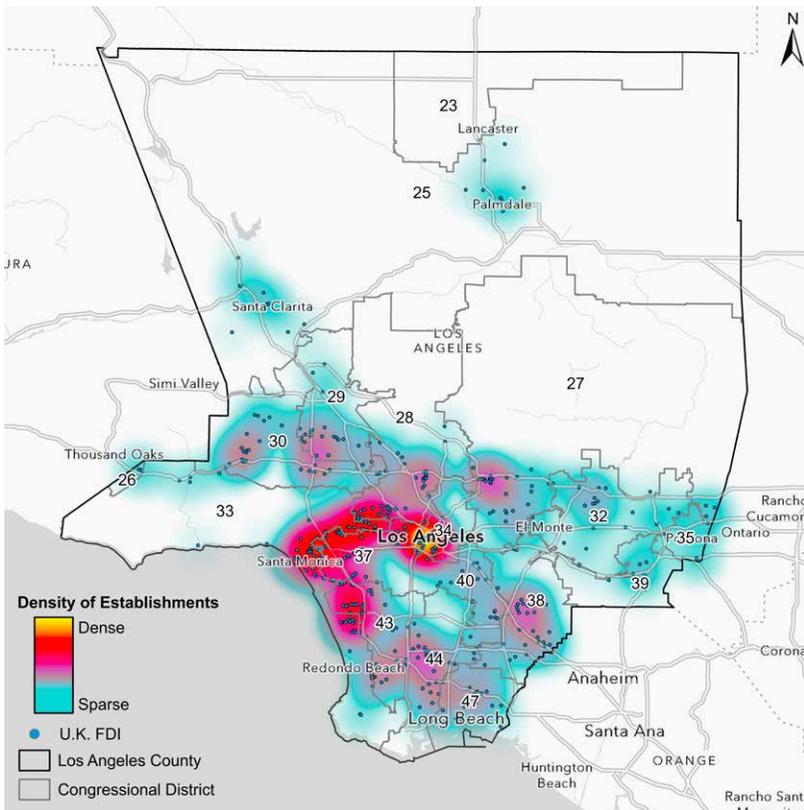
UK FOE EMPLOYMENT IN LA COUNTY by Industry



- 0% - Natural Resources
- 0% - Construction
- 10% - Manufacturing
- 8% - Wholesale Trade
- 10% - Retail Trade
- 15% - Transportation, Warehousing and Utilities
- 6% - Information
- 10% - Financial Activities
- 33% - Professional and Business Services
- 0% - Education and Healthcare
- 7% - Leisure and Hospitality
- 1% - Other (Personal Services)
- 0% - Government

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

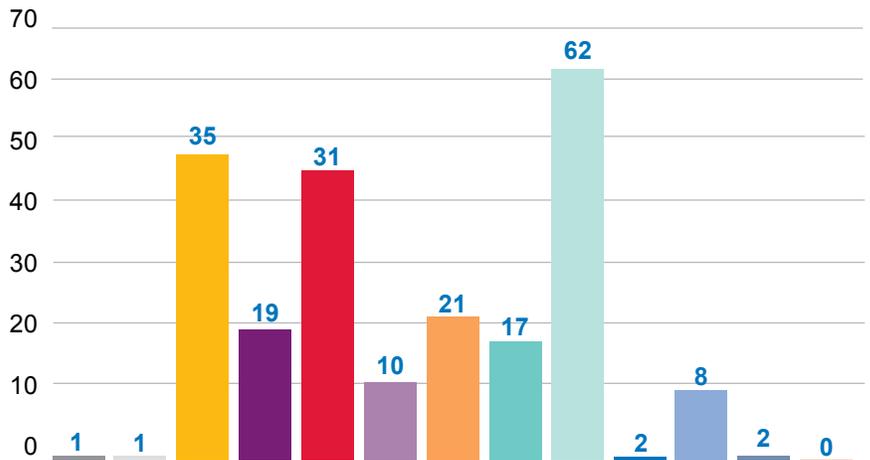
This density map shows the concentration of UK FOEs in Los Angeles County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. We can see that the most dense clusters of FOEs in the county reside in downtown Los Angeles 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

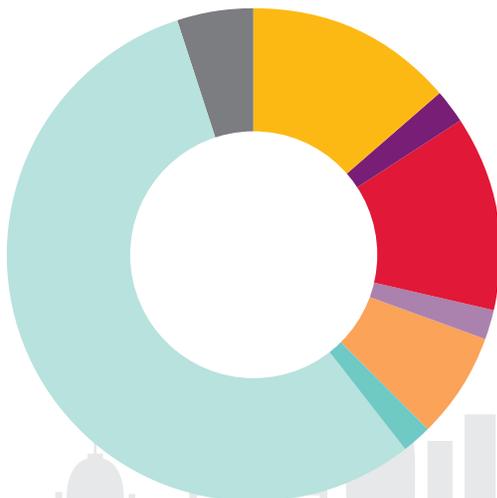
In total, foreign direct investment from the United Kingdom is responsible for 20,860 jobs across 209 firms in Orange County, making it the second-largest location for investment. Orange County joins Los Angeles County as the only two locations where FOE employment numbers in the tens of thousands, with 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

- 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



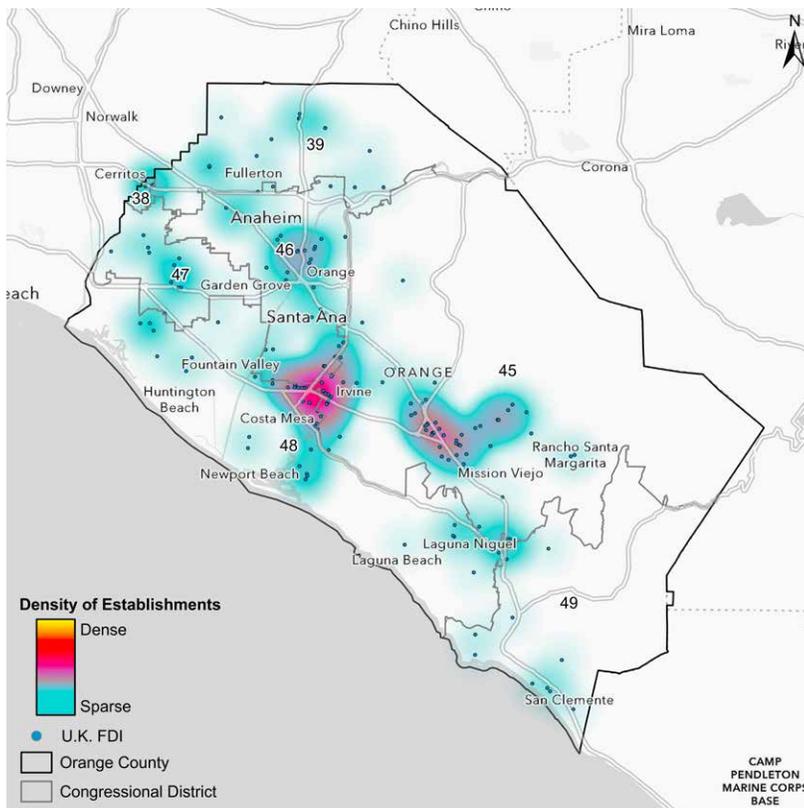
UK FOE EMPLOYMENT IN ORANGE COUNTY by Industry



- 0% - Natural Resources
- 0% - Construction
- 14% - Manufacturing
- 2% - Wholesale Trade
- 13% - Retail Trade
- 2% - Transportation, Warehousing and Utilities
- 7% - Information
- 2% - Financial Activities
- 56% - Professional and Business Services
- 0% - Education and Healthcare
- 5% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government

TOP 10 UK EMPLOYERS IN ORANGE COUNTY

Experian Corporation	4,553
Experian Information Solutions, Inc.	3,920
Atlantic Richfield Company Inc.....	2,200
Deloitte Consulting LLP.....	800
Compass Group Usa, Inc.	767
Deloitte & Touche LLP.....	700
Smiths Detection Inc.....	609
Sage Software Holdings, Inc.....	400
Edwards Theatres Circuit, Inc.....	366
Control Components Inc.	365



UK Foreign Direct Investment Locations within Orange County

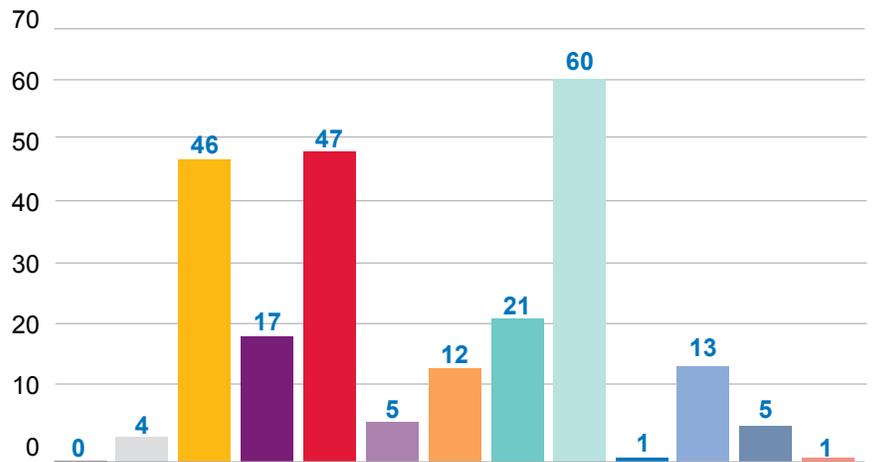
This density map shows the concentration of UK FOEs in Orange County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The densest cluster of foreign firms is around the major city of Irvine, a hub for business and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

San Diego County OVERVIEW

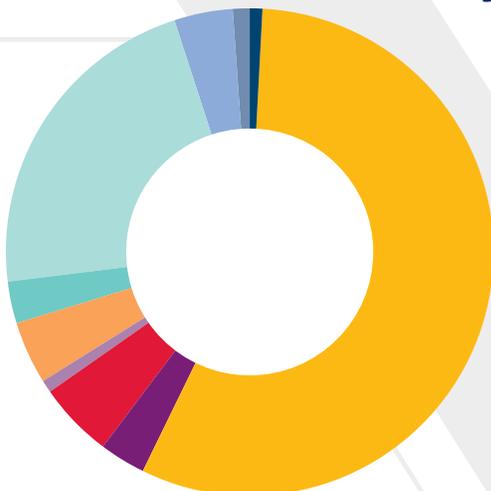
San Diego County accounts for the third largest share of employment supported by foreign direct investment from the United Kingdom, with 9,440 employees across 232 firms. The strength of FOE employment in San Diego County lies in manufacturing, with over 5,400 workers participating in everything from 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

- 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



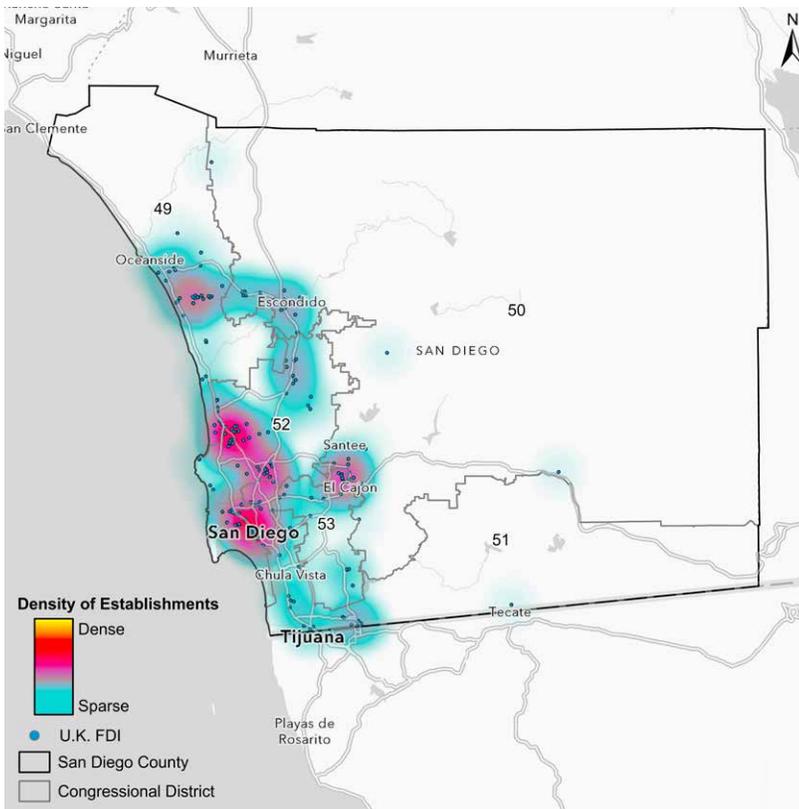
UK FOE EMPLOYMENT IN SAN DIEGO COUNTY by Industry



- 0 - Natural Resources
- 1% - Construction
- 57% - Manufacturing
- 3% - Wholesale Trade
- 5% - Retail Trade
- 1% - Transportation, Warehousing and Utilities
- 4% - Information
- 3% - Financial Activities
- 22% - Professional and Business Services
- 0% - Education and Healthcare
- 4% - Leisure and Hospitality
- 1% - Other (Personal Services)
- 0% - Government

TOP 10 UK EMPLOYERS IN SAN DIEGO COUNTY

BAE Systems San Diego Ship Repair Inc.....	1,278
Senior Operations LLC.....	739
GKN Aerospace Chem-Tronics Inc.....	667
G4s Secure Solutions (usa) Inc.....	255
Six Continents Hotels, Inc.....	252
Steico Industries, Inc.....	230
Broan-Nutone LLC.....	227
R. J. Reynolds Tobacco Company.....	226
BAE Systems Information and Electronic.....	222
Systems Integration Inc.	
Crydom, Inc.....	216



UK Foreign Direct Investment Locations within San Diego County

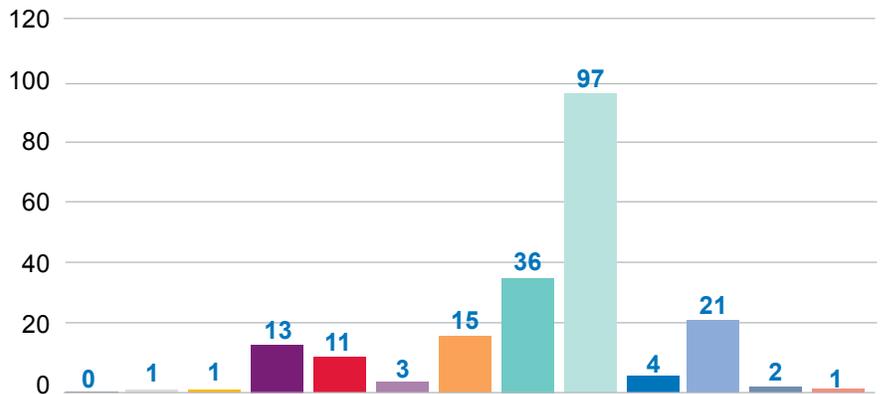
This density map shows the concentration of UK FOEs in San Diego County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. As expected, the density of establishments is greatest in the city of San Diego, where there 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

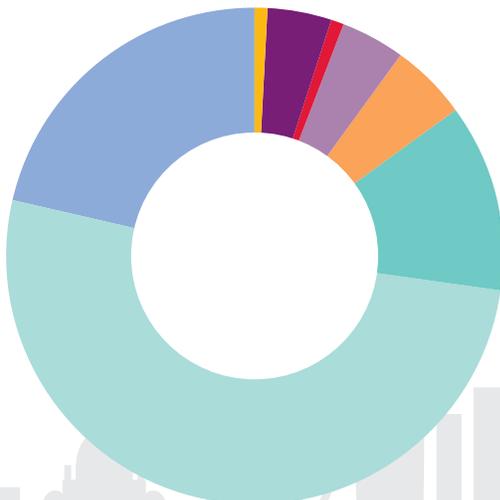
The first county not located within the Southern California region, San Francisco County is the strength of the Bay Area when it comes to FDI from the United Kingdom, with 8,080 employees and 205 firms. San Francisco County is similar to Orange County in that the majority of FOE employment comes from 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

- 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



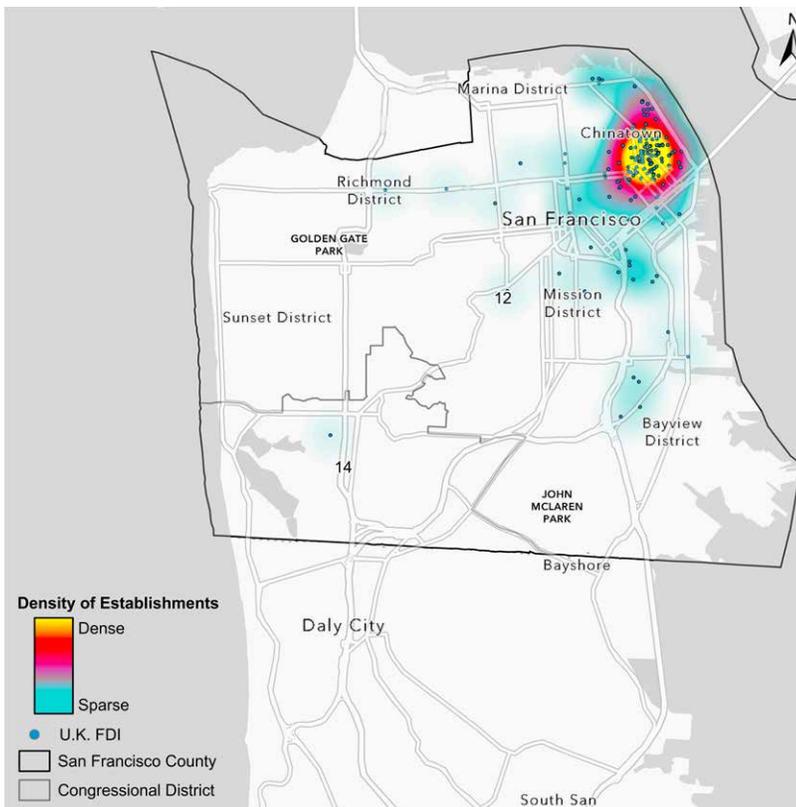
UK FOE EMPLOYMENT IN SAN FRANCISCO COUNTY by Industry



- 0% - Natural Resources
- 0% - Construction
- 1% - Manufacturing
- 4% - Wholesale Trade
- 1% - Retail Trade
- 4% - Transportation, Warehousing and Utilities
- 5% - Information
- 12% - Financial Activities
- 51% - Professional and Business Services
- 0% - Education and Healthcare
- 21% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government

TOP 10 UK EMPLOYERS IN SAN FRANCISCO COUNTY

Six Continents Hotels, Inc.....	683
Kimpton Hotel & Restaurant Group LLC	489
Akqa, Inc.	400
Deloitte & Touche LLP.....	354
AON Consulting, Inc.....	321
Post Street Renaissance Partners,.....	300
A California Limited Partnership	
Deloitte Tax LLP.....	294
First Student, Inc.....	285
Arctouch LLC.....	200
Arup North America Limited	200



UK Foreign Direct Investment Locations within San Francisco County

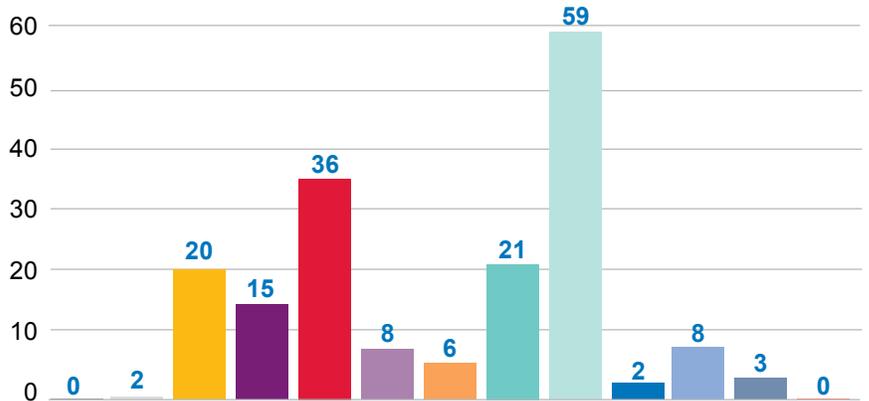
This density map shows the concentration of UK FOEs in San Francisco County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. There is an extremely dense cluster of firms in the Financial District of San Francisco, 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

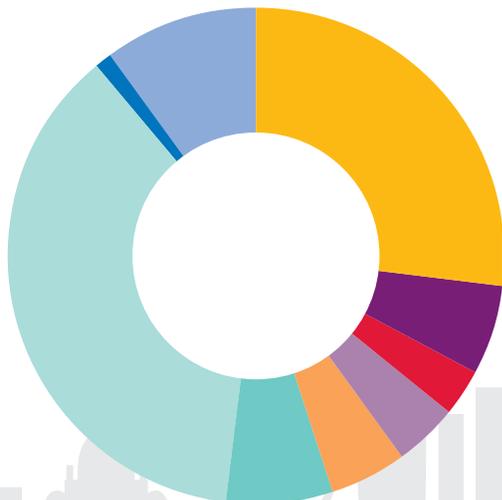
Santa Clara County is the fifth most invested in region by firms from the United Kingdom. In total, its 180 firms support 7,940 employees. As would be expected, professional and business services is the most prominent sector in this county with nearly 3,000 jobs supported; Santa Clara County is a nexus 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

- 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



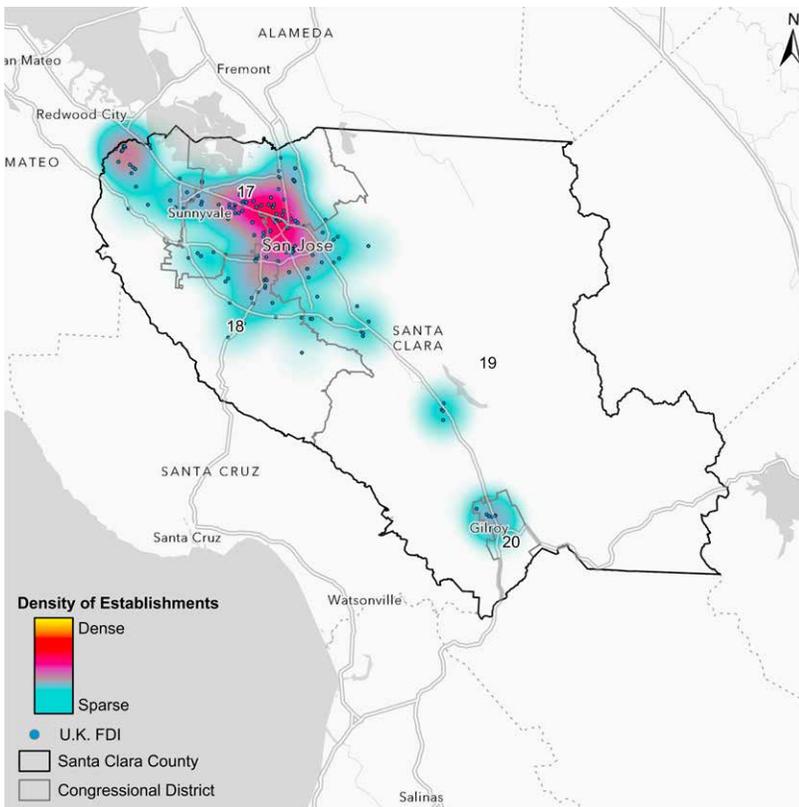
UK FOE EMPLOYMENT IN SANTA CLARA COUNTY by Industry



- 0% - Natural Resources
- 0% - Construction
- 27% - Manufacturing
- 6% - Wholesale Trade
- 3% - Retail Trade
- 4% - Transportation, Warehousing and Utilities
- 5% - Information
- 7% - Financial Activities
- 37% - Professional and Business Services
- 1% - Education and Healthcare
- 10% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government

TOP 10 UK EMPLOYERS IN SANTA CLARA COUNTY

BAE Systems Land & Armaments L.P.....	1,000
Mobica US Inc.....	900
Compass Group Usa, Inc.....	702
Deloitte & Touche LLP.....	450
Sperasoft, Inc.	375
Cobham Advanced Electronic Solutions Inc.....	316
Entco, LLC	296
Deloitte Tax LLP.....	294
Medimmune, LLC	275
Dialog Semiconductor, Inc.....	263



UK Foreign Direct Investment Locations within Santa Clara County

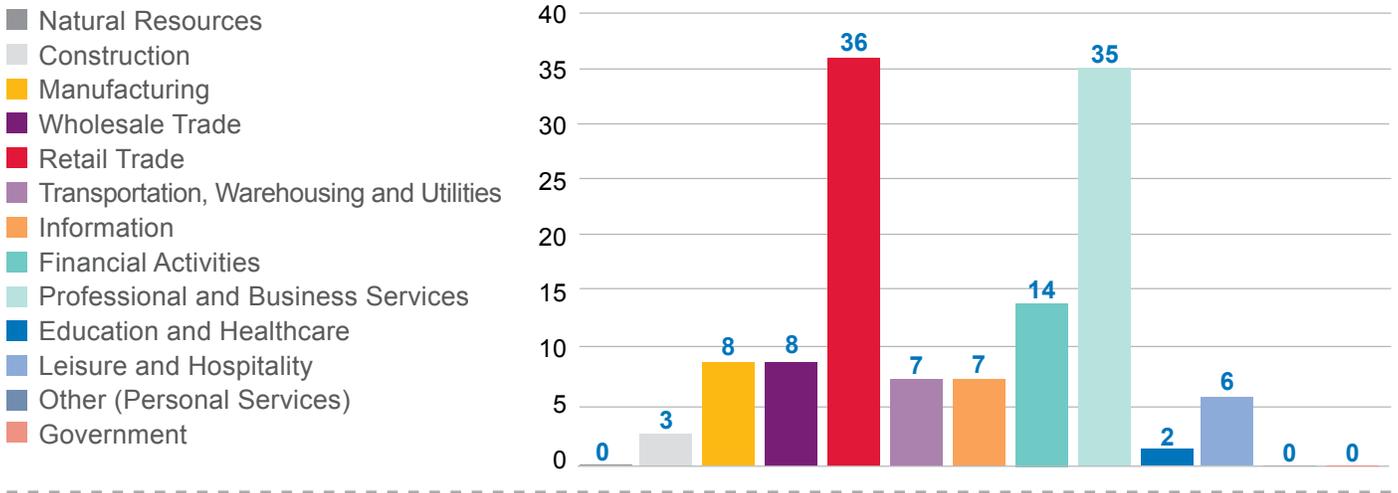
This density map shows the concentration of UK FOEs in Santa Clara County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The densest cluster of establishments is centered around the city of San Jose, the largest 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

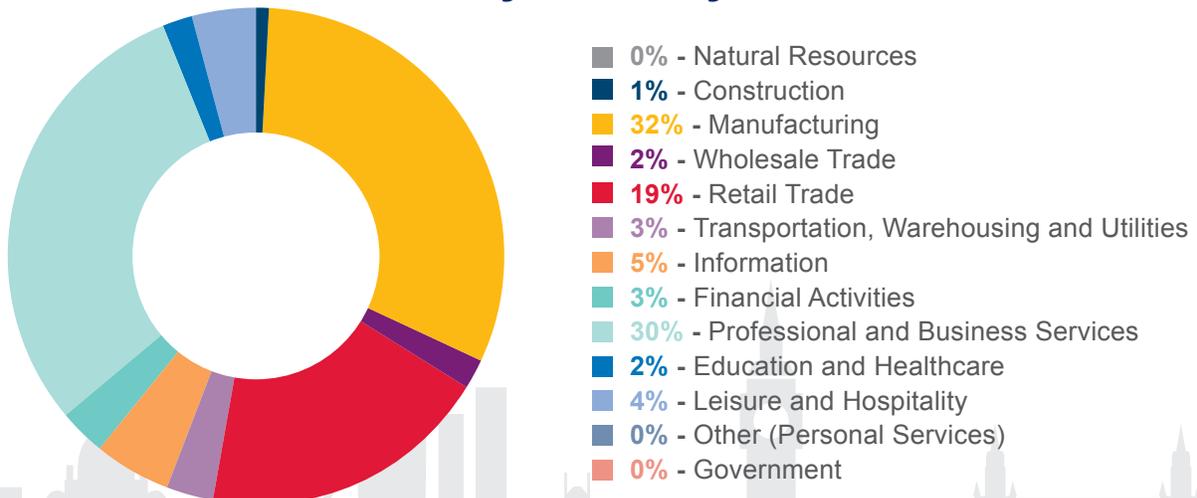


Alameda County, located to the east of San Francisco County and northeast of Santa Clara County, is the seventh most populous county in the state and sixth largest in terms of foreign investment from UK firms. The county has an interesting mix of foreign involvement: 35 firms in professional and business 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.

UK FOEs IN ALAMEDA COUNTY by Industry

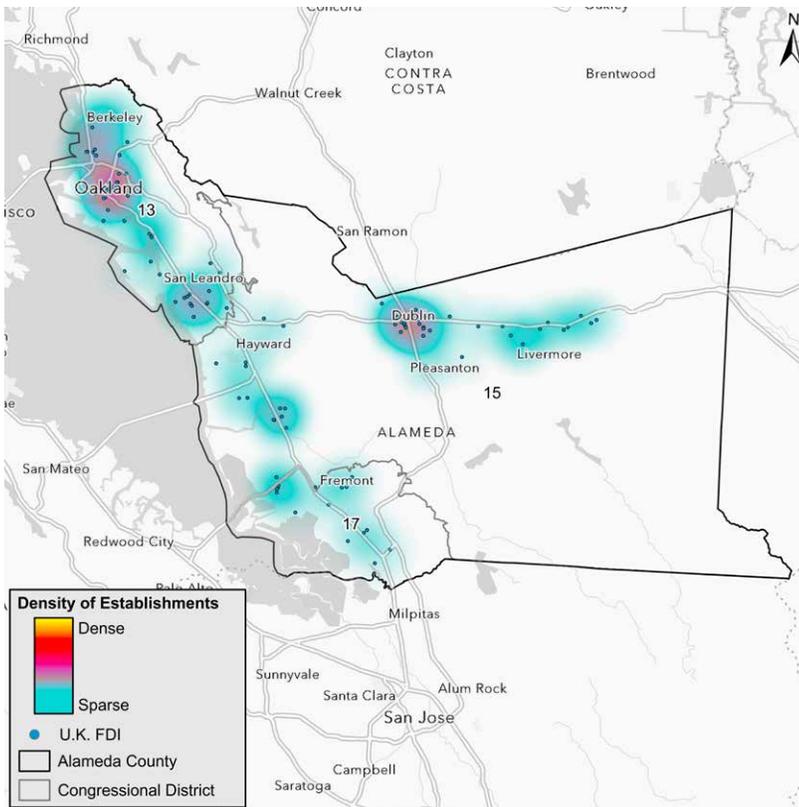


UK FOE EMPLOYMENT IN ALAMEDA COUNTY by Industry



TOP 10 UK EMPLOYERS IN ALAMEDA COUNTY

Smiths Detection Inc.....	1,009
Rolls-Royce Corporation.....	500
Deloitte & Touche LLP.....	244
Morgan Advanced Ceramics, Inc.....	175
Synarc Inc.....	153
Wood Environment & Infrastructure Solutions, Inc.	150
Telecom Technology Services Incorporated	130
Compass Group Usa, Inc.....	102
Saba Software, Inc.....	100
Exponential Interactive, Inc.....	90



UK Foreign Direct Investment Locations within Alameda County

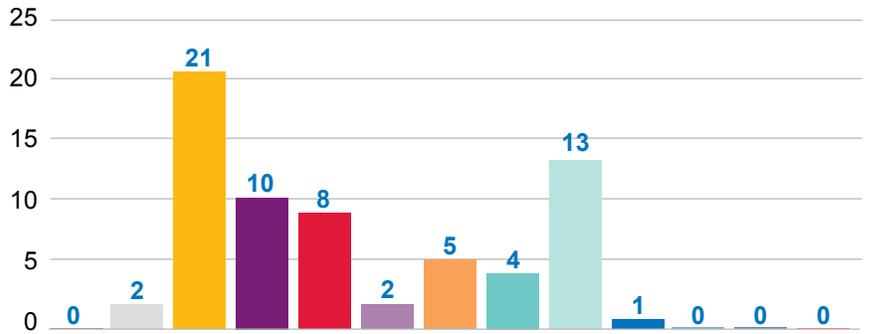
This density map shows the concentration of UK FOEs in Alameda County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. Firms are concentrated in clusters along the two major freeways that run through the region, the 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

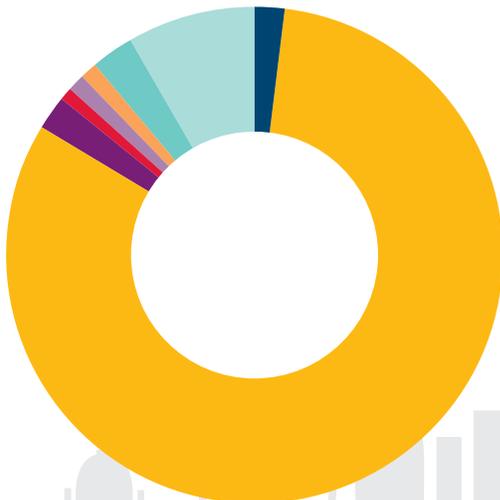
Ventura County is located to the northwest of Los Angeles County along the Pacific Coast, and supports 3,330 employees within 66 foreign-owned enterprises from the United Kingdom. The story of foreign direct investment in Ventura County is a short one, as manufacturing accounts for 81 percent of this 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.

UK FOEs IN VENTURA 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



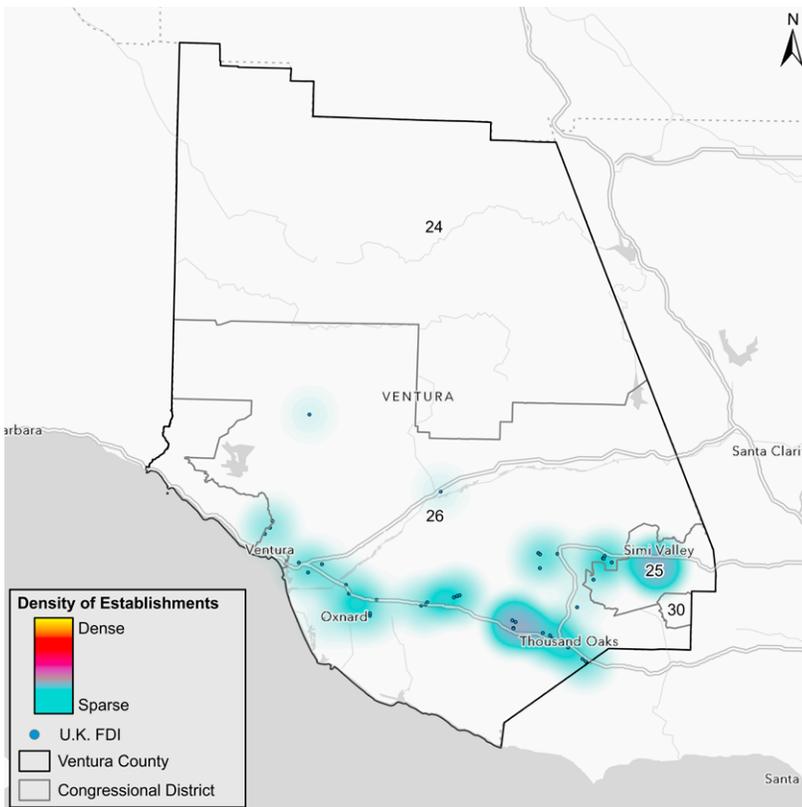
UK FOE EMPLOYMENT IN VENTURA COUNTY by Industry



- 0% - Natural Resources
- 2% - Construction
- 81% - Manufacturing
- 2% - Wholesale Trade
- 1% - Retail Trade
- 1% - Transportation, Warehousing and Utilities
- 1% - Information
- 3% - Financial Activities
- 8% - Professional and Business Services
- 0% - Education and Healthcare
- 0% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government

TOP 10 UK EMPLOYERS IN VENTURA COUNTY

Kavlico Corporation	1,390
Meggitt Safety Systems, Inc.....	457
Meggitt-Usa, Inc.....	169
Carros Sensors & Systems Company, LLC	125
G4s Secure Solutions (usa) Inc.	119
Cool-Pak, LLC.....	85
Sani-Tech West, Inc.....	82
Gooch and Housego (california) LLC	80
Keller North America, Inc.....	75
Ipayment, Inc.....	71



UK Foreign Direct Investment Locations within Ventura County

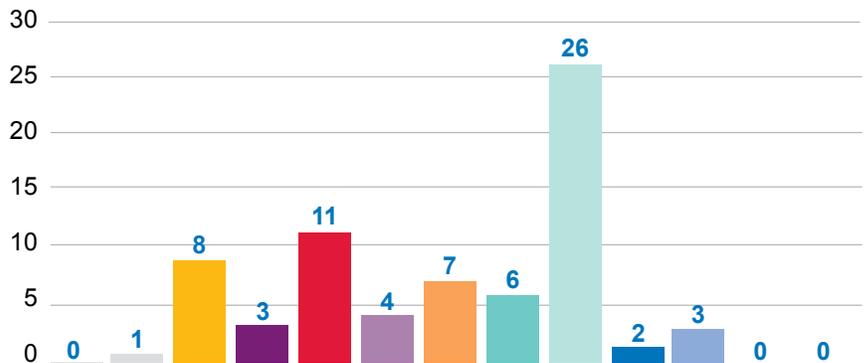
This density map shows the concentration of UK FOEs in Ventura County, as well as providing the individual locations of firms, where each point represents a foreign-owned enterprise from the United Kingdom. The cities along the 110 freeway enjoy the highest density of firms from the United Kingdom, including 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

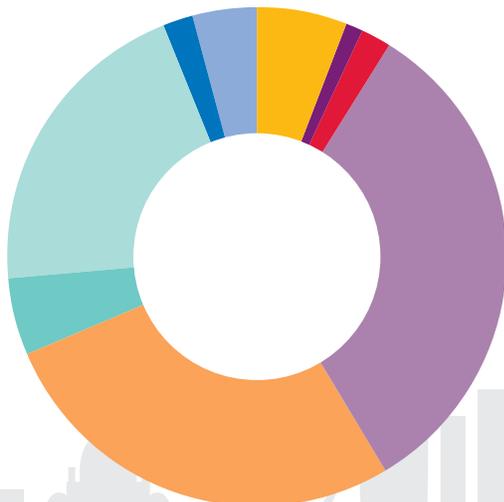
San Mateo County, another key component of the Bay Area region, is home to 71 foreign-owned enterprises from the United Kingdom with 3,100 jobs. San Mateo differs from its counterparts on this list as its heaviest employment concentrations are in transportation, warehousing and utilities with 1,000 workers 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

- 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



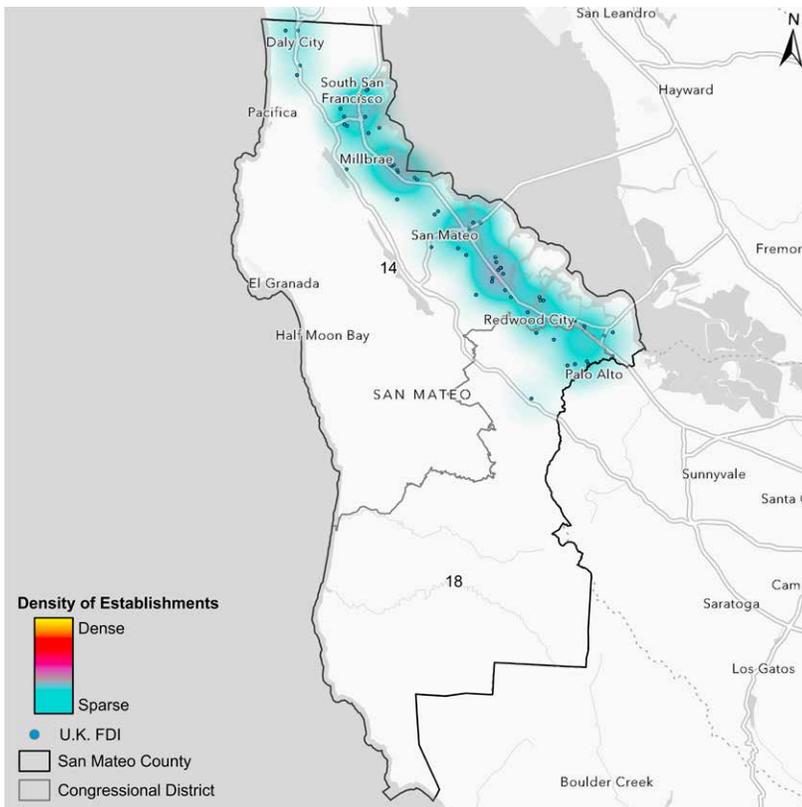
UK FOE EMPLOYMENT IN SAN MATEO COUNTY by Industry



- 0% - Natural Resources
- 0% - Construction
- 6% - Manufacturing
- 1% - Wholesale Trade
- 2% - Retail Trade
- 32% - Transportation, Warehousing and Utilities
- 27% - Information
- 5% - Financial Activities
- 20% - Professional and Business Services
- 2% - Education and Healthcare
- 4% - Leisure and Hospitality
- 0% - Other (Personal Services)
- 0% - Government

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
Enlighten, 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.

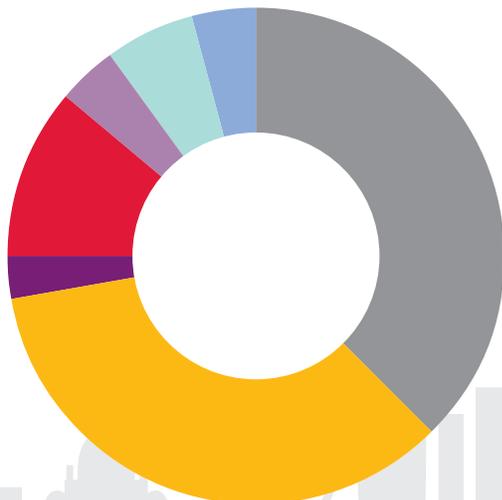
Kern County OVERVIEW

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.

UK FOEs IN KERN COUNTY by Industry

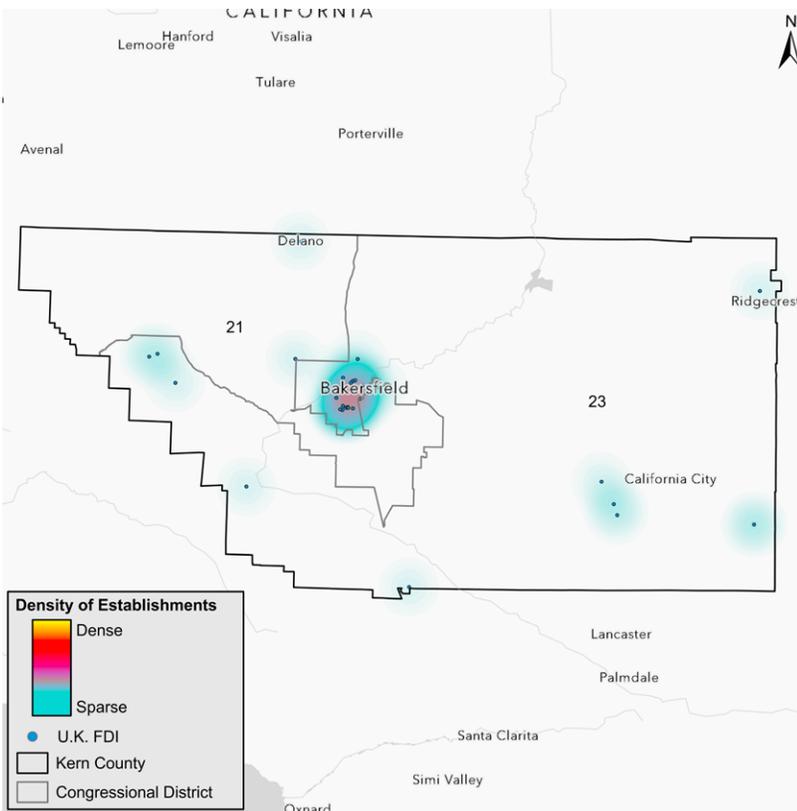


UK FOE EMPLOYMENT IN KERN COUNTY by Industry



TOP 10 UK EMPLOYERS IN KERN COUNTY

U.S. Borax Inc.....	900
Aera Energy Services Company	800
Aera Energy LLC.....	416
Rio Tinto Minerals Inc.	150
G4s Secure Solutions (usa) Inc.....	125
Six Continents Hotels, Inc.....	122
Seaboard International Inc.....	97
United States Cold Storage, Inc.....	96
Hunting Energy Services, Inc.....	76
Ferguson Enterprises, LLC	71



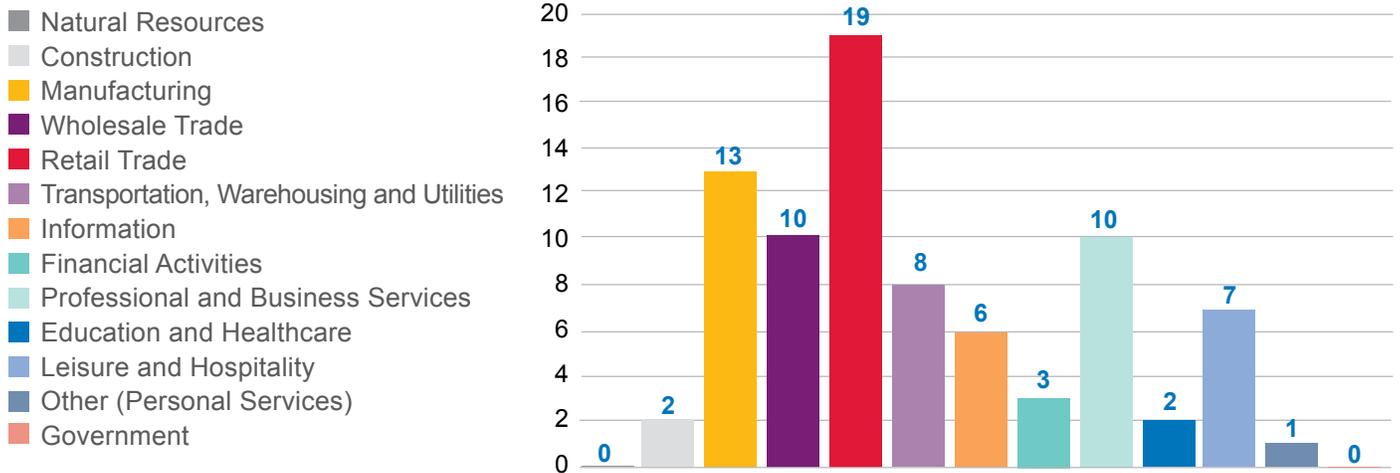
UK Foreign Direct Investment Locations within Kern County

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.

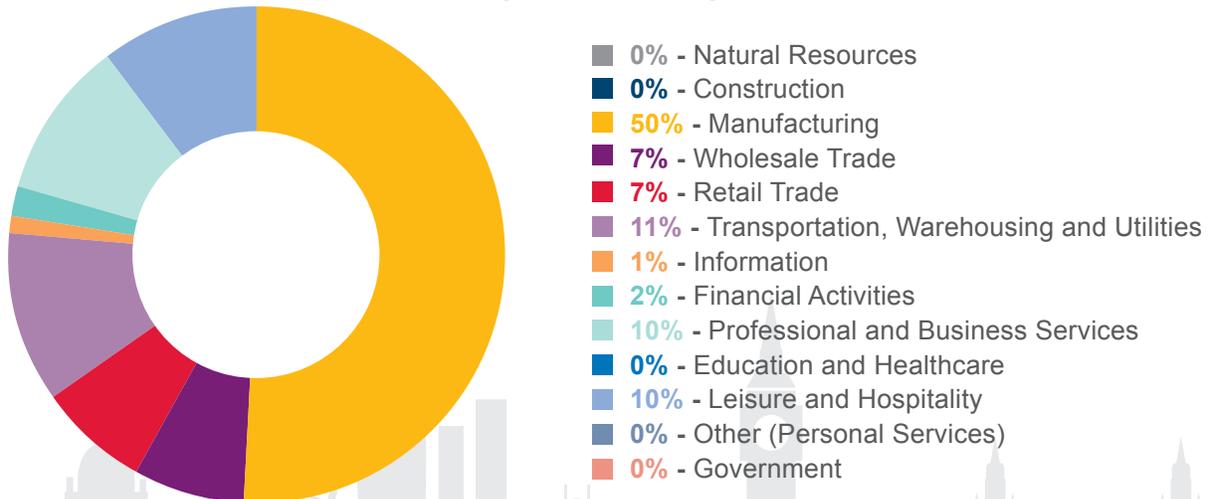
San Bernardino OVERVIEW

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

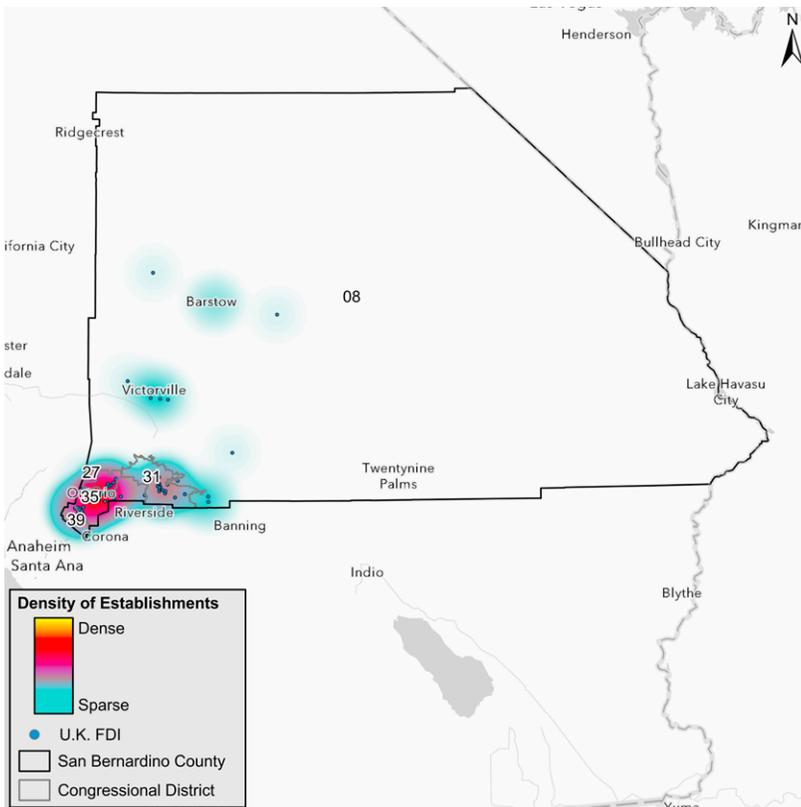


UK FOE EMPLOYMENT IN SAN BERNARDINO COUNTY by Industry



TOP 10 UK EMPLOYERS IN SAN BERNADINO COUNTY

Jacuzzi Products Co.....	620
Amcor Rigid Packaging Usa, LLC.....	175
First Student, Inc.	140
Six Continents Hotels, Inc.....	128
Bon Appetit Management Co.....	120
Jacuzzi Inc.....	110
Jacuzzi Brands LLC.....	101
Bunzl Retail Services, LLC.....	87
Menzies Aviation (texas), Inc.....	63
Sundance Spas, Inc.....	60



UK Foreign Direct Investment Locations within San Bernadino County

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 EMPLOYERS

in the Rest of California

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 CONTRA COSTA COUNTY (#11)

First Student, Inc.	333
BP West Coast Products LLC	310
Seatel, Inc.	150

TOP 3 EMPLOYERS IN RIVERSIDE COUNTY (#12)

G4s Secure Solutions (usa) Inc.....	300
Luxfer Inc.	286
First Student, Inc.	184

TOP 3 EMPLOYERS IN FRESNO COUNTY (#13)

Morrison Management Specialists, Inc.	200
Trillium Pumps Usa, Inc.	130
Greyhound Lines, Inc.	121

TOP 3 EMPLOYERS IN SACRAMENTO COUNTY (#14)

Lexisnexis Courtlink, Inc.	160
Ferguson Enterprises, LLC	99
Regal Cinemas, Inc.	97

TOP 3 EMPLOYERS IN YOLO COUNTY (#15)

Schilling Robotics, LLC	221
Pgp International, Inc.	180
Regal Cinemas, Inc.	45

TOP 3 EMPLOYERS IN NAPA COUNTY (#16)

Diageo North America Inc.....	180
Amcor Flexibles LLC.....	135
Codorniu Napa, Inc.	89

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 BUTTE COUNTY (#17)

Build.com, Inc.	380
Morrison Management Specialists, Inc.	97
Ferguson Enterprises, LLC.....	26

TOP 3 EMPLOYERS IN PLACER COUNTY (#22)

Morgan Advanced Ceramics, Inc.	167
Regal Cinemas, Inc.	38
The Finish Line Inc.....	18

TOP 3 EMPLOYERS IN SAN JOAQUIN COUNTY (#18)

First Student, Inc.	200
Greyhound Lines, Inc.	50
Bunzl Usa, Inc.	45

TOP 3 EMPLOYERS IN SONOMA COUNTY (#23)

Diageo North America Inc.	65
Gefen, LLC.....	42
Stardust.com.....	25

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 MARIN COUNTY (#24)

Cushman & Wakefield, Inc.	61
Bon Appetit Management Co.	40
Humanconcepts, LLC.....	40

TOP 3 EMPLOYERS IN EL DORADO COUNTY (#20)

Amdocs, Inc.	336
Regal Cinemas, Inc.	49
Ferguson Enterprises, LLC.....	13

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

Bilateral 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.

Top 10 Exports Commodities by NAICS Category

NAICS Category	2018	2019	2020	YTD(SEP) 2021
334) Computer and Electronic Products	\$1,637,302,000	\$1,317,109,000	\$1,121,423,000	\$819,682,000
325) Chemicals	\$454,211,000	\$453,882,000	\$596,772,000	\$594,696,000
336) Transportation Equipment	\$659,554,000	\$774,892,000	\$1,136,740,000	\$266,948,000
339) Miscellaneous Manufactured Commodities	\$359,345,000	\$412,511,000	\$305,268,000	\$219,162,000
333) Machinery, Except Electrical	\$309,437,000	\$287,560,000	\$237,839,000	\$212,776,000
930) Used or Second-Hand Merchandise	\$380,403,000	\$580,820,000	\$393,616,000	\$209,547,000
312) Beverages & Tobacco Products	\$214,293,000	\$227,561,000	\$234,072,000	\$148,428,000
335) Electrical Equipment, Appliances and Components	\$236,238,000	\$227,662,000	\$173,775,000	\$146,809,000
332) Fabricated Metal Products; NESOI	\$238,775,000	\$237,580,000	\$154,714,000	\$141,591,000
111) Agricultural Products	\$191,153,000	\$201,650,000	\$195,589,000	\$140,530,000
TOTAL	\$4,680,711,000	\$4,721,227,000	\$4,549,808,000	\$2,900,169,000

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

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





United Kingdom Foreign Direct Investment in California

IN PARTNERSHIP WITH THE BRITISH
CONSULATE GENERAL IN LOS ANGELES

