

## Top 25 Businesses in Alphabetical Order:

- AB California Acquisition
- CA Superstores Chrysler Jeep
- Chevron Service Stations
- Costco Wholesale
- Cummins West
- ESD Company
- F.H. Dailey Chevrolet
- Ghirardelli Chocolate Company
- Home Depot
- Macy's Department Store
- Marina Square Auto Center
- Nike Factory Store
- Nordstrom Rack
- Peterson Tractor
- Peterson Trucks
- Safeway Stores
- San Leandro Honda
- Shell Service Stations
- SSMB Pacific Holding Company
- Target Stores
- The Ford Store
- Union 76 Service Stations
- Walmart Stores
- Western States Oil
- White Cap Industries

## 3rd Quarter 2012 in Review

Several payment anomalies inflated the City's cash receipts this quarter as a few major businesses made current and back payments. Once adjusting for payment anomalies, the City grew by 2.4% or \$11,145,700 in taxable sales. Roughly one third of the growth came from use tax associated with retooling in production facilities. Other strong growth came from auto sales, fuel-related sales, apparel stores and retail building materials.

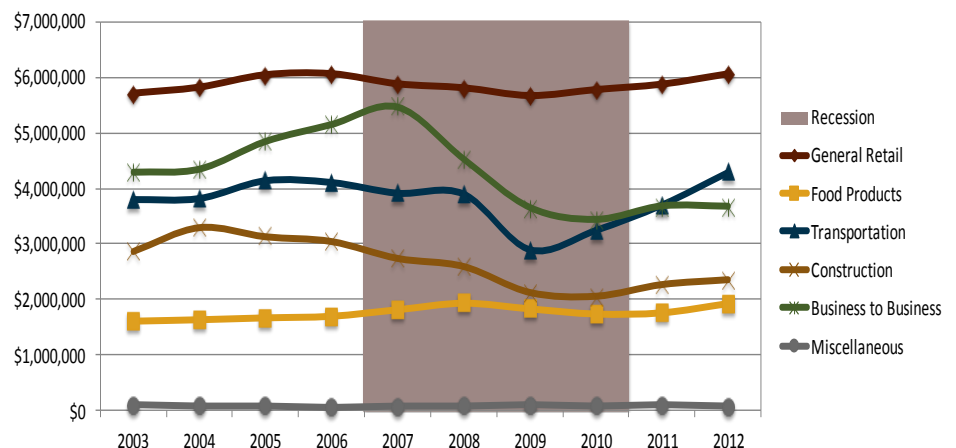
While the Business to Business category experienced the most decline from the same period last year, most of the declines are due to larger-than-usual payments a year ago compared to normal payments this quarter.

Cash Receipts	Quarter	FY to Date	Calendar Year
San Leandro	7.2%	5.5%	6.9%
San Leandro 1/4% Measure	9.2%	13.9%	-
Alameda Countywide	6.8%	9.5%	8.9%
S.F. Bay Area	7.2%	7.3%	8.0%
Statewide	8.1%	7.4%	8.0%

## Sales Tax Before, During and After the Recession

This historical look at sales tax by economic category depicts the impact of the recession on the City. Food Products and General Retail weathered the hard times better than the other categories while Business to Business experienced the most severe decline.

### Sales Tax in 3rd Quarter of Each Year



## Regional Expectations

### Employment

While employment on the Peninsula has attracted some workers from the City others are starting to find work close to home. By the end of 2013 the unemployment rate in the region should drop below 8%, which will further stabilize the economy in the City.

### Housing

Contractors are pulling more building permits and returning to finish jobs started before the recession. Not only did permits for single-family

homes increase by 21.6% in the first three quarters of 2012 regionally compared to 2011, but permits for multi-family permits also increased by 19.0%. The resulting housing-affordability advantage in the region versus other areas in the S.F. Bay Area will continue to grow incomes and jobs.

The median single-family existing home price in the region has increased by 14% since last year and nearly 38% since the price bottom in 2009. The median single-family home price is expected to reach

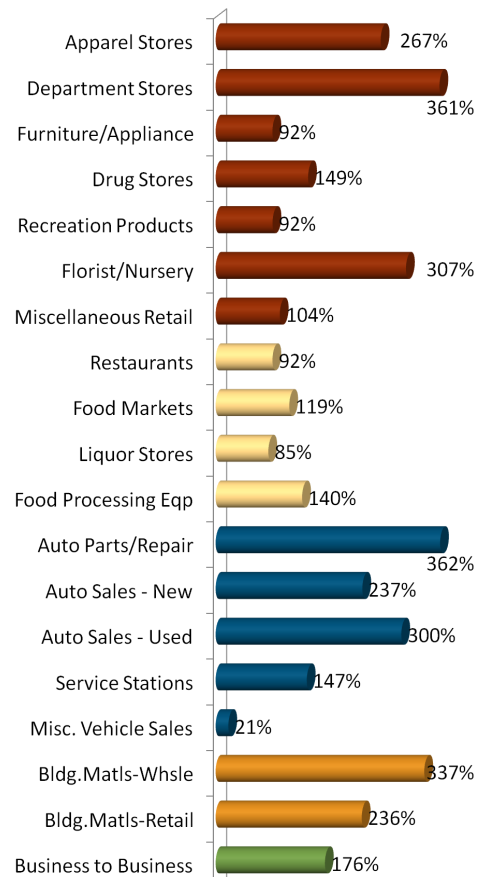
\$400,000 by the middle of 2015. Quarterly home sales will reach between 6,500 to 7,000 by the middle of 2014.

### Taxable Sales

The region will see close to 9% growth during the first part of 2013 followed by projected moderate growth of 4% to 6% in the following years.

## San Leandro Sales Tax Capture Analysis

>100 = Capture; <100 = Leakage



## Sales Tax from Major Categories and Segments

	Quarter-Over-Quarter			Year-Over-Year		
	Jul - Sept 2011 to Jul - Sept 2012			Oct - Sept 2011 to Oct - Sept 2012		
	City of San Leandro	S.F. Bay Area	Statewide	City of San Leandro	S.F. Bay Area	Statewide
<b>Total</b>	<b>2.4%</b>	<b>6.6%</b>	<b>5.7%</b>	<b>5.8%</b>	<b>7.4%</b>	<b>6.8%</b>
General Retail	4.7%	4.7%	4.1%	3.2%	4.7%	4.5%
Food Products	16.4%	6.8%	5.8%	9.2%	7.5%	7.0%
Transportation	7.3%	11.6%	8.2%	14.2%	10.6%	10.4%
Construction	2.3%	6.0%	7.2%	3.9%	9.4%	7.7%
Business To Business	-11.8%	4.5%	4.6%	1.2%	6.9%	5.8%
Department Stores	4.8%	6.2%	5.2%	2.0%	4.4%	4.3%
Auto Sales - New	6.7%	24.6%	20.2%	13.6%	16.9%	17.8%
Bldg.Matls-Whsle	-6.2%	9.4%	13.0%	-1.5%	13.7%	11.9%
Apparel Stores	12.5%	9.0%	7.5%	10.4%	9.0%	8.1%
Service Stations	-0.4%	3.2%	0.4%	10.7%	7.4%	6.0%
Heavy Industry	-13.7%	5.3%	6.2%	-8.7%	13.0%	12.4%
Restaurants	6.5%	6.6%	5.0%	7.6%	7.6%	6.8%
Bldg.Matls-Retail	14.7%	2.9%	1.7%	12.2%	5.7%	4.1%
Auto Parts/Repair	34.3%	1.6%	3.4%	43.4%	4.0%	6.2%
Light Industry	-14.7%	6.6%	2.7%	0.8%	4.7%	2.3%
Miscellaneous Retail	13.0%	0.4%	1.8%	7.7%	1.2%	1.9%
Food Markets	43.2%	6.8%	8.0%	15.3%	6.6%	7.8%
Electronic Equipment	-44.2%	-2.2%	5.2%	0.0%	-1.9%	1.5%
Office Equipment	2.5%	-2.9%	-1.0%	7.9%	2.3%	1.9%