



# Target Industry Cluster Analysis

**Green Hills Heritage Highway Region, Missouri**

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Target Industry Cluster

# 01 overview

**Green Hills Heritage  
Highway, MO**

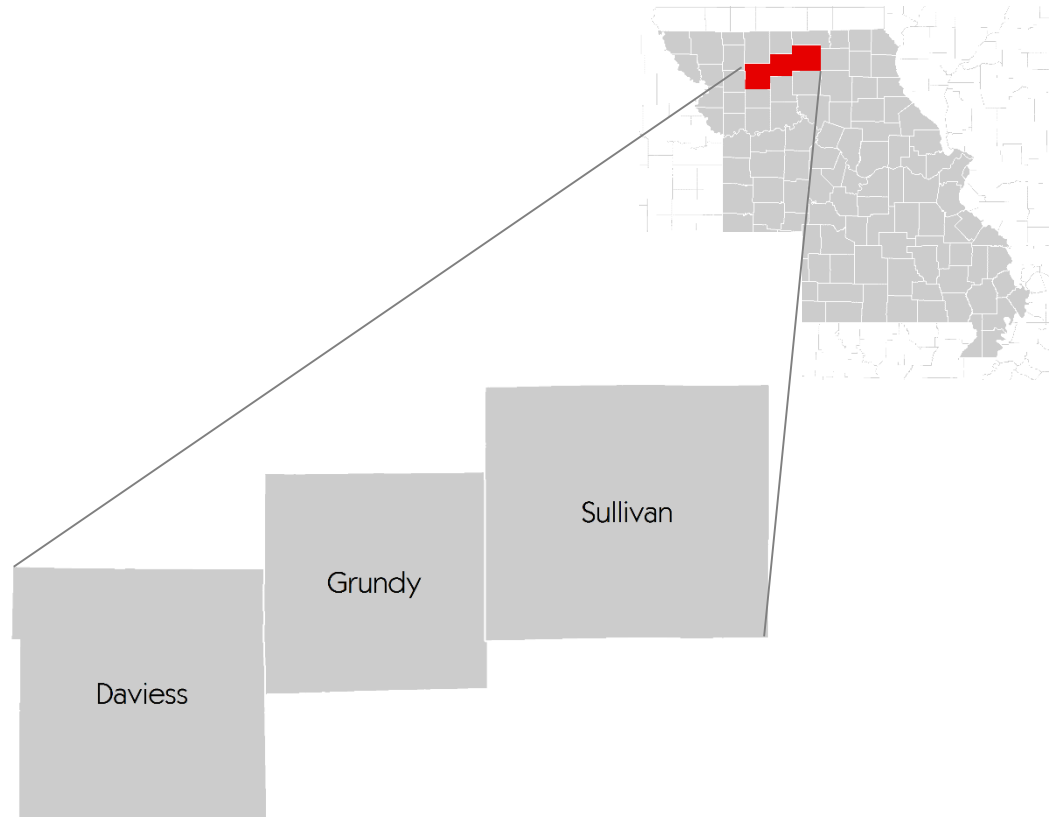
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## Overview

# Green Hills Heritage Highway, Region

The Green Hills region is comprised of three Missouri counties.

- Daviess
- Grundy
- Sullivan



# 02 Industry cluster analysis

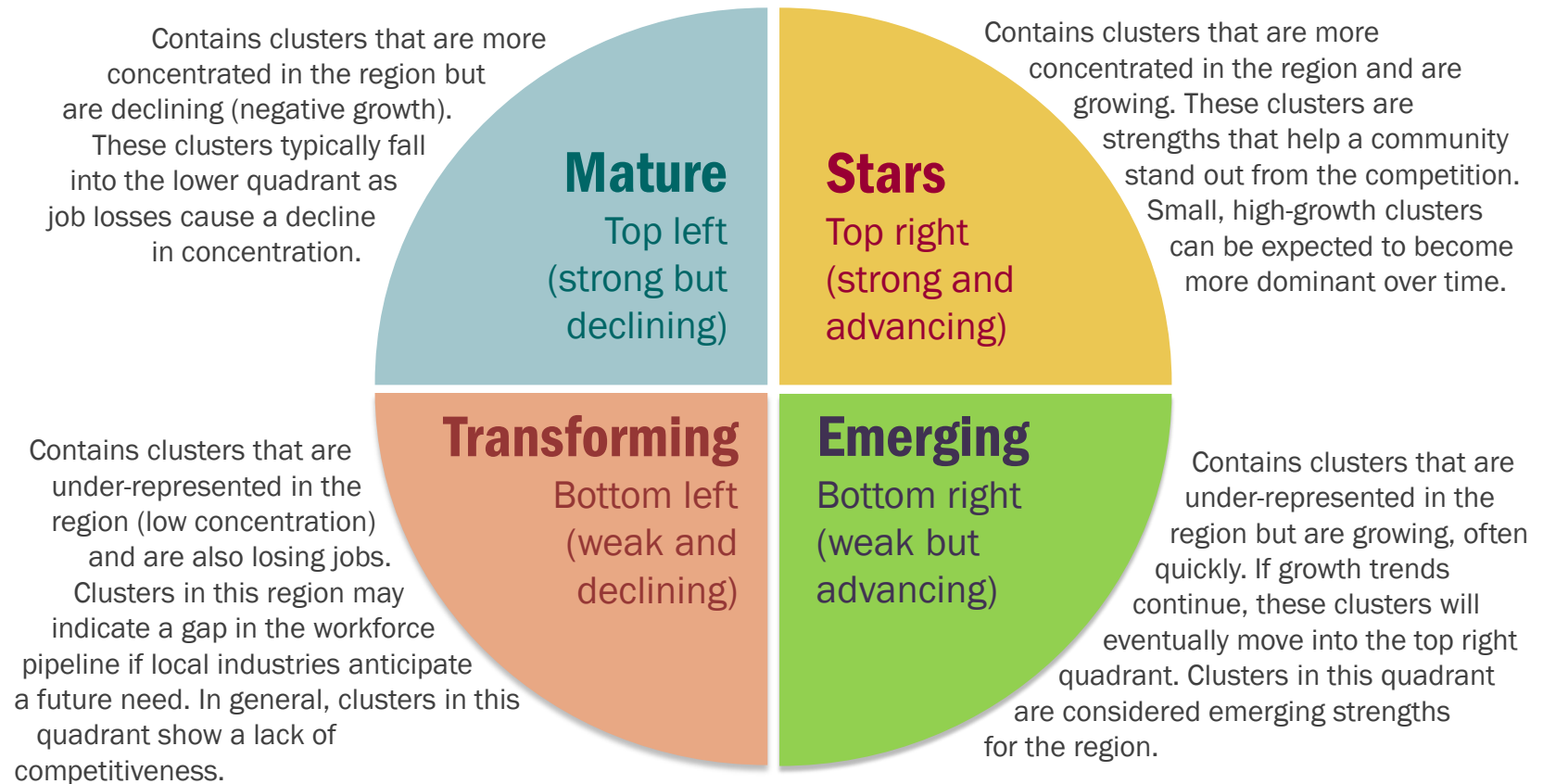
Green Hills Heritage  
Highway, MO

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## Industry cluster analysis

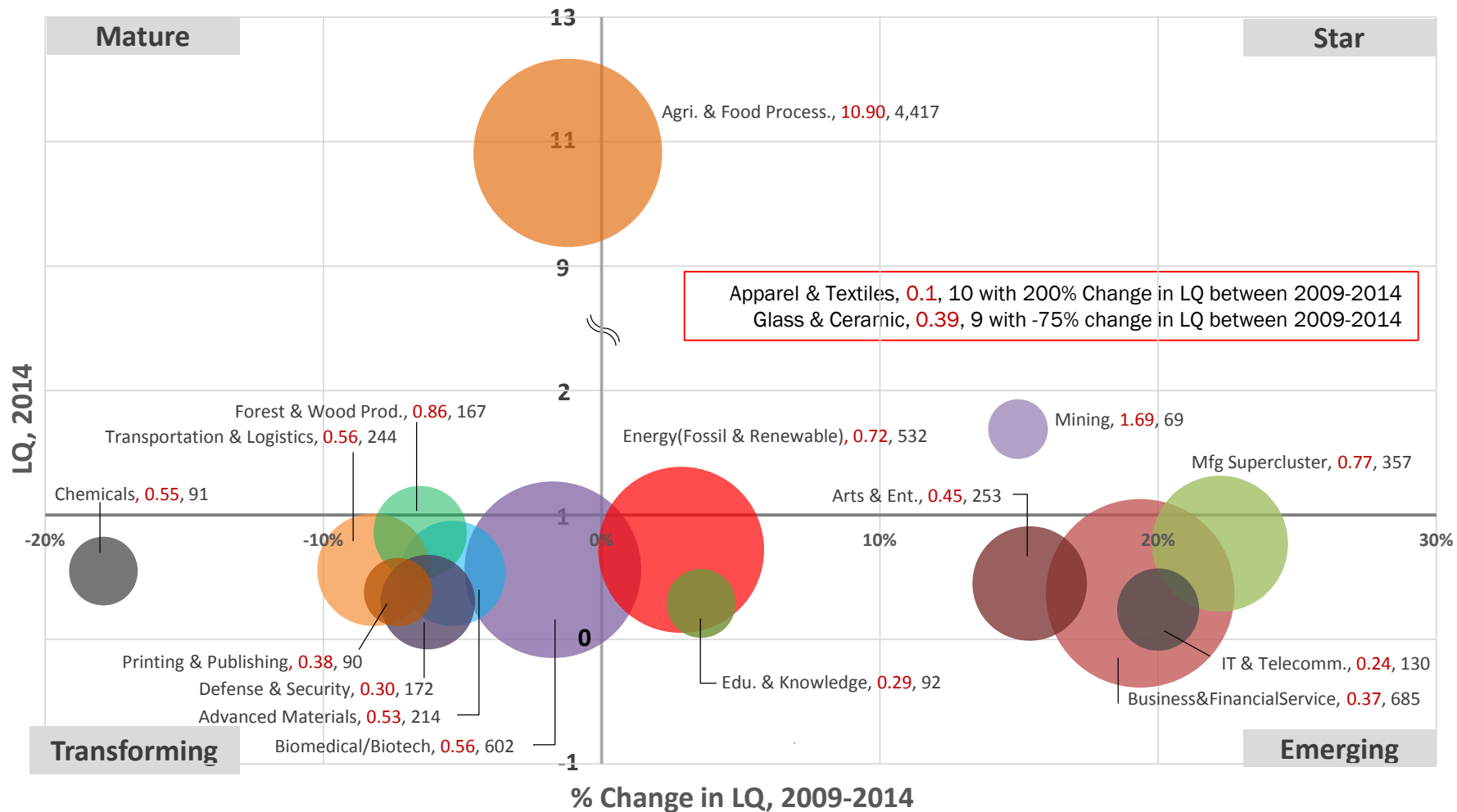
# How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



## Industry cluster analysis

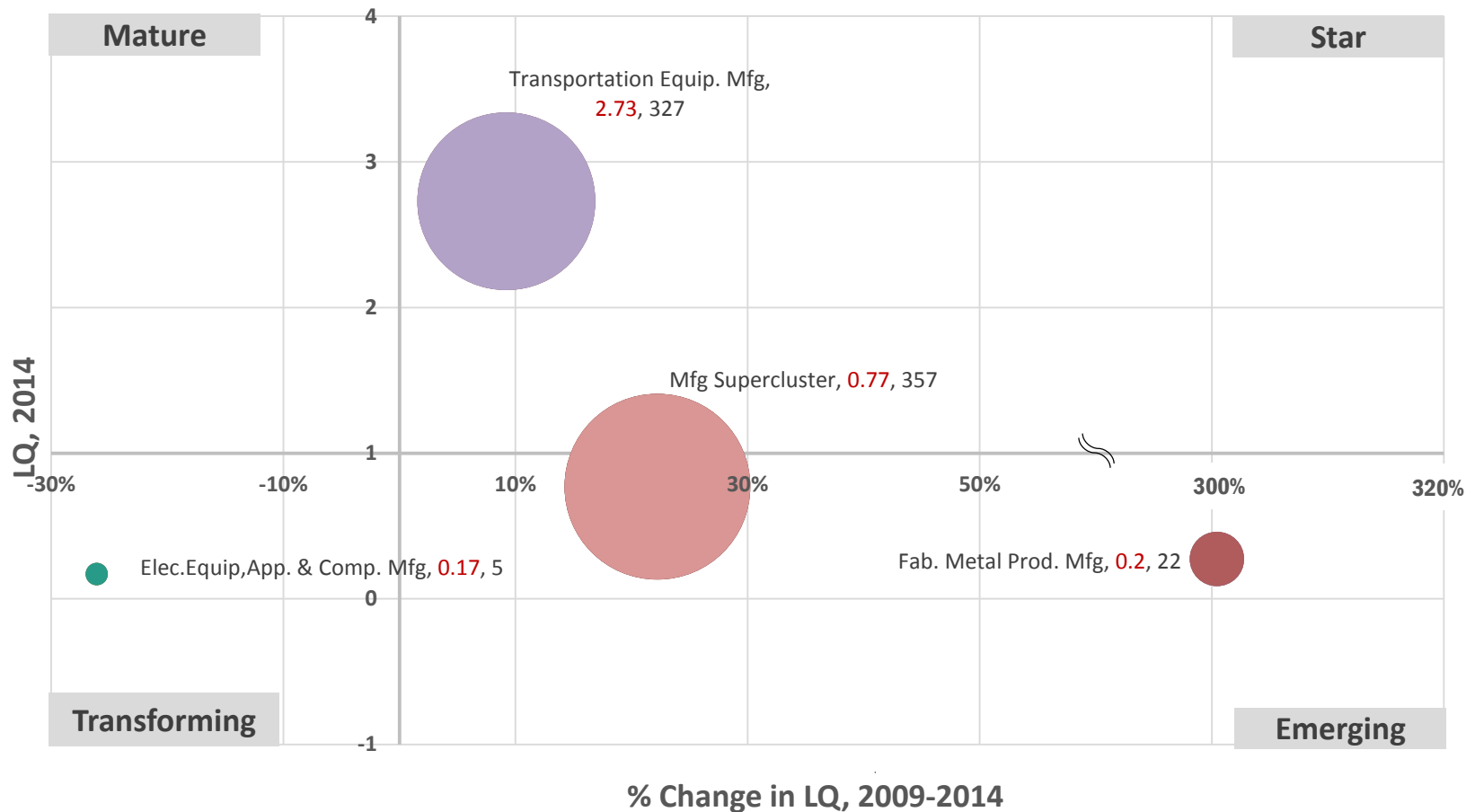
# Cluster bubble chart, 2009-2014



### section 02

## Industry cluster analysis

# Manufacturing sub-cluster, 2009-2014



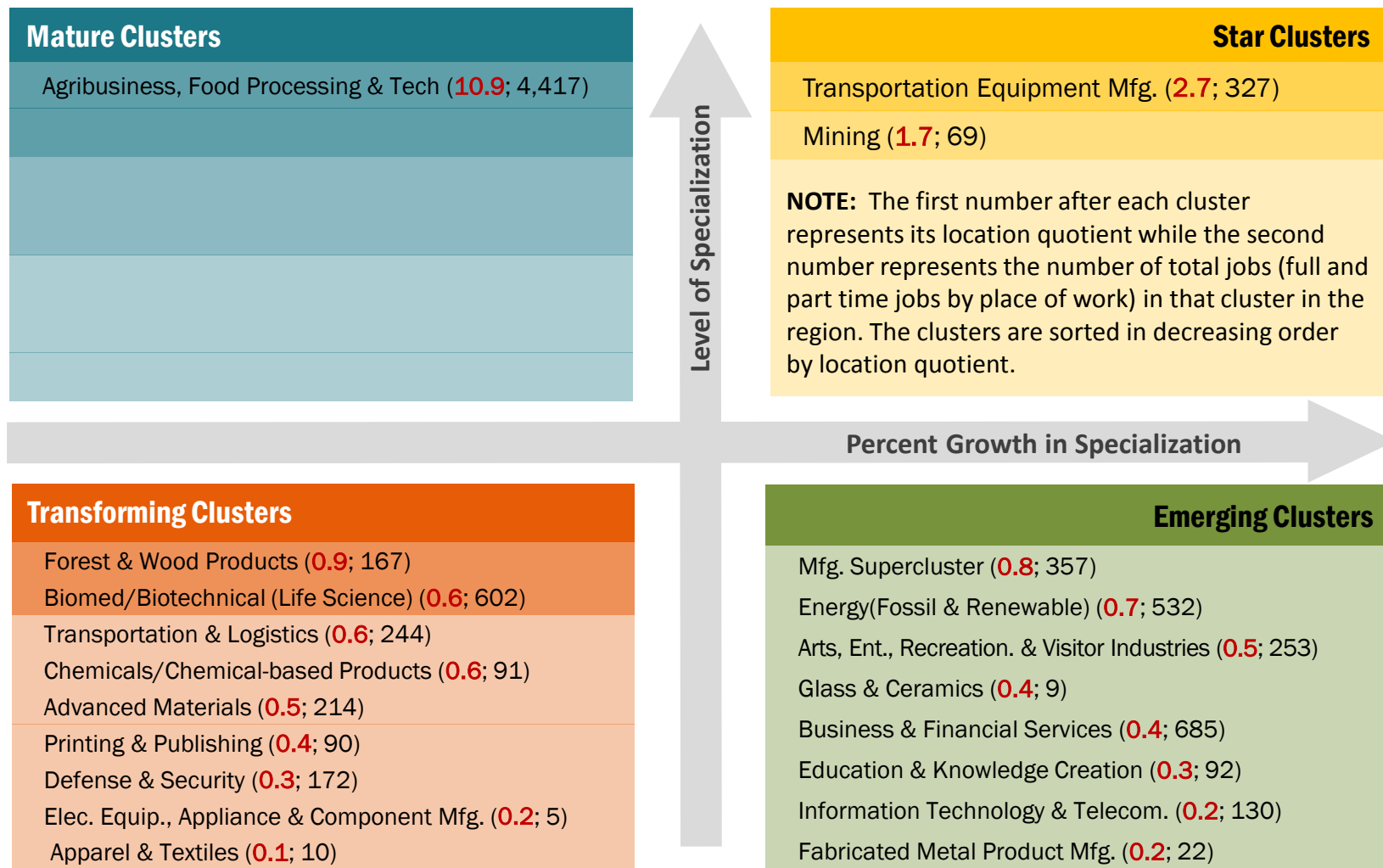
Note 1: Label includes cluster name, LQ 2014, and Employment 2014;

Note 2: Computer & Electronic Product Mfg.; Machinery Mfg.; and Primary Metal Mfg. subclusters do not exist in this region.

## section 02



## Industry cluster analysis



Note: Computer & Electronic Product does not exist; Electrical Equipment & Appliances and Primary Metal Mfg. have too few jobs.

## Industry cluster analysis

# Bubble chart interpretation

### Mature Industries

Only one industry cluster in the Green Hills Region is in the Maturing stage: Agribusiness, Food Processing and Technology Manufacturing. This industry cluster is fairly concentrated (LQ = 10.9), but its growth is trending downward. It is worth noting, however, that the Green Hills Region may find it worthwhile to invest in efforts to shore up the concentration of this industry.

### Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Green Hills Region these are Forest & Wood Products, Biomedical/Biotechnical (Life Science), Transportation & Logistics, Chemicals/Chemical-based Products, Advanced Materials, Printing & Publishing, Defense & Security, Electric Equipment, Appliance & Component Manufacturing, and Apparel & Textiles. Any amount of growth in these industries would require relatively large investments.

### Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The most highly concentrated of the Star industry clusters in the Green Hills Region is Transportation Equipment Manufacturing. Its location quotient is 2.77, indicating that the cluster is nearly 3 times more concentrated in the region compared to the U.S. This cluster is followed by Mining that has fairly high LQ of 1.7 as well.

### Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are eight Emerging clusters in the Green Hills Region: Manufacturing Supercluster, Energy (Fossil & Renewable); Arts, Entertainment, Recreational & Visitor Industries; Glass & Ceramics, Business & Financial Services, Education & Knowledge Creation, Information Technology & Telecommunications, Fabricated Metal Product Manufacturing.

# 03 Target Industry cluster

**Agribusiness, Food Processing  
And Technology**

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**Arts, Entertainment,  
Recreation And Visitor  
Industries Cluster**

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**Education And Knowledge  
Creation Cluster**

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**Transportation Equipment  
Manufacturing Cluster**

## Shift-Share Analysis by Top Industry Sectors: Green Hills Heritage Highway, MO

### Agribusiness, Food Processing And Technology Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Animal Production	1,490	105	-134	↑ 141
Crop Production	1,070	85	-76	-53
Animal (except Poultry) Slaughtering	1,036	81	-138	↑ 22
Meat Processed from Carcasses	447	28	-18	↑ 64
Livestock Merchant Wholesalers	63	5	-6	↑ 2
All Other Miscellaneous Food Manufacturing	51	4	2	-1
Farm Labor Contractors and Crew Leaders	47	3	3	-1
Grain and Field Bean Merchant Wholesalers	39	4	1	-19
Other Animal Food Manufacturing	36	2	-2	↑ 13
Farm and Garden Machinery and Equipment Merchant Wholesalers	35	2	0	↑ 7
Soil Preparation, Planting, and Cultivating	29	17	28	-236
Farm Supplies Merchant Wholesalers	21	0	0	↑ 18
Postharvest Crop Activities (except Cotton Ginning)	16	1	0	↑ 3

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient data (<10 jobs) for Crop Harvesting, Primarily by Machine and Other Snack Food Manufacturing. Local input is needed to ascertain number of jobs in these industries.

#### section 03

## Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

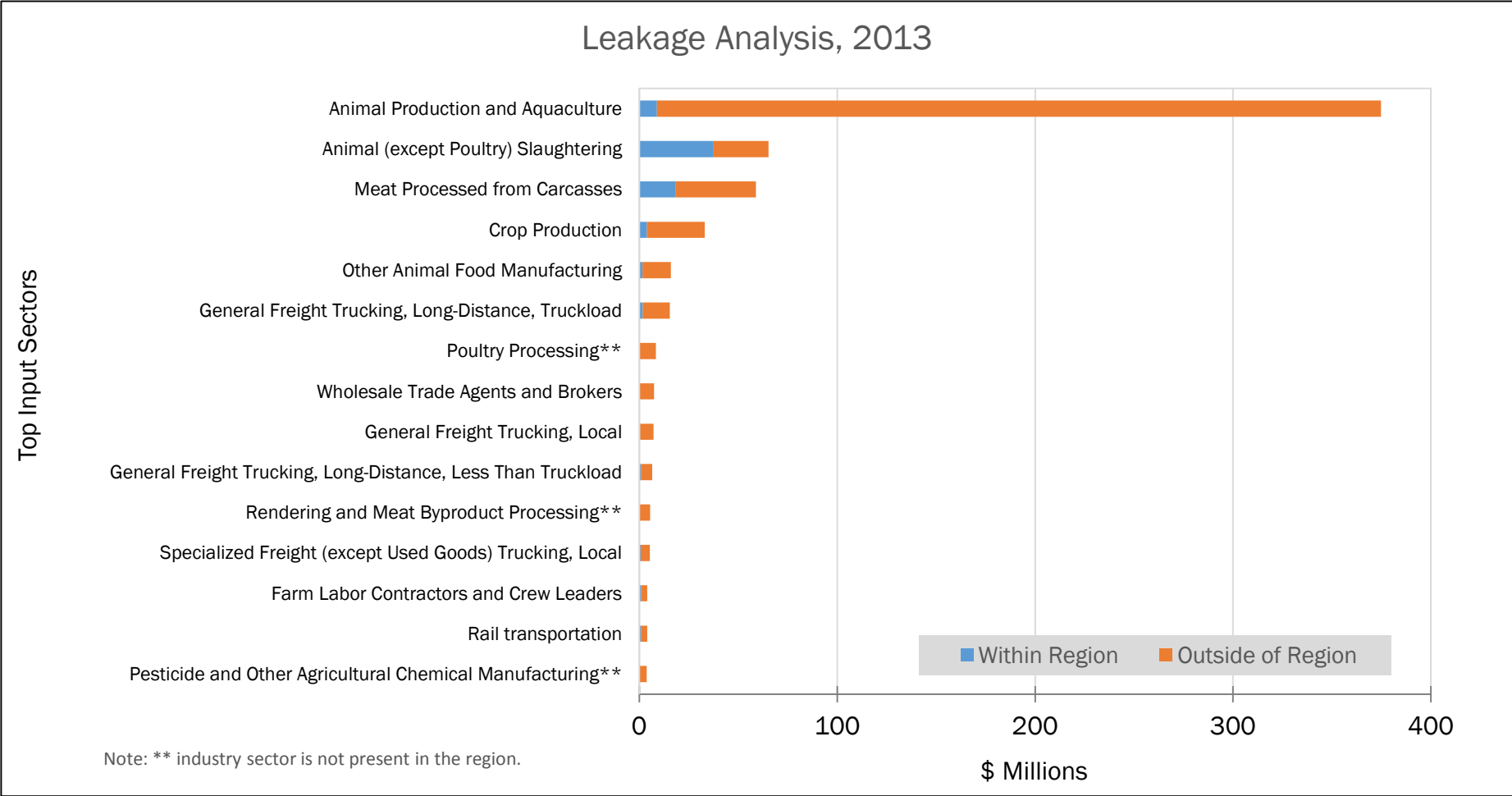
### Agribusiness, Food Processing And Technology Cluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Animal Production and Aquaculture	\$374.75	2%	98%
Animal (except Poultry) Slaughtering	\$65.26	58%	42%
Meat Processed from Carcasses	\$58.84	31%	69%
Crop Production	\$33.01	12%	88%
Other Animal Food Manufacturing	\$15.94	10%	90%
General Freight Trucking, Long-Distance, Truckload	\$15.32	11%	89%
Poultry Processing **	\$8.30	0%	100%
Wholesale Trade Agents and Brokers	\$7.37	2%	98%
General Freight Trucking, Local	\$7.11	6%	94%
General Freight Trucking, Long-Distance, Less Than Truckload	\$6.49	12%	88%
Rendering and Meat Byproduct Processing **	\$5.48	0%	100%
Specialized Freight (except Used Goods) Trucking, Local	\$5.29	12%	88%
Farm Labor Contractors and Crew Leaders	\$4.02	24%	76%
Rail Transportation	\$3.92	22%	78%
Pesticide and Other Agricultural Chemical Manufacturing**	\$3.75	0%	100%

Note: \*\* industry sector is not present in the region.

# Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

## Agribusiness, Food Processing And Technology Cluster



**section 03**

## Top Occupations: Green Hills Heritage Highway, MO

### Agribusiness, Food Processing And Technology Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,372	4%	\$10	High school diploma or equivalent
Meat, Poultry, and Fish Cutters and Trimmers	440	5%	\$15	Less than high school
Slaughterers and Meat Packers	188	-3%	\$14	Less than high school
Food Processing Workers, All Other	125	7%	\$13	Less than high school
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	98	-55%	\$8	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	87	0%	\$11	Less than high school
Packaging and Filling Machine Operators and Tenders	80	-1%	\$16	High school diploma or equivalent
Food Batchmakers	64	7%	\$15	High school diploma or equivalent
Maintenance and Repair Workers, General	44	0%	\$15	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	37	3%	\$23	Postsecondary non-degree award
Farmworkers, Farm, Ranch, and Aquacultural Animals	36	-12%	\$12	Less than high school
Packers and Packers, Hand	32	-18%	\$10	Less than high school
Heavy and Tractor-Trailer Truck Drivers	30	-9%	\$15	Postsecondary non-degree award
Butchers and Meat Cutters	29	0%	\$12	Less than high school
Helpers--Production Workers	29	-9%	\$13	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

#### section 03

## Shift-Share Analysis by Top Industry Sectors: Green Hills Heritage Highway, MO

### Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Hotels (except Casino Hotels) and Motels	58	4	0	↑ 7
Racetracks	31	2	-1	↑ 8
Independent Artists, Writers, and Performers	25	2	1	-7
Bed-and-Breakfast Inns	23	0	0	↑ 19
Other Spectator Sports	19	0	0	↑ 13
Radio Stations	18	2	-1	-3
Golf Courses and Country Clubs	17	2	-1	-11
All Other Amusement and Recreation Industries	13	1	1	↑ 4

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient data (<10 jobs) for Sports Teams and Clubs; Fitness and Recreational Sports Centers; Travel Agencies; Sound Recording Studios; Bowling Centers; Marinas; and Scenic and Sightseeing Transportation, Land, etc. Local input is needed to ascertain number of jobs in these industries.



## Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

### Arts, Entertainment, Recreation And Visitor Industries Cluster

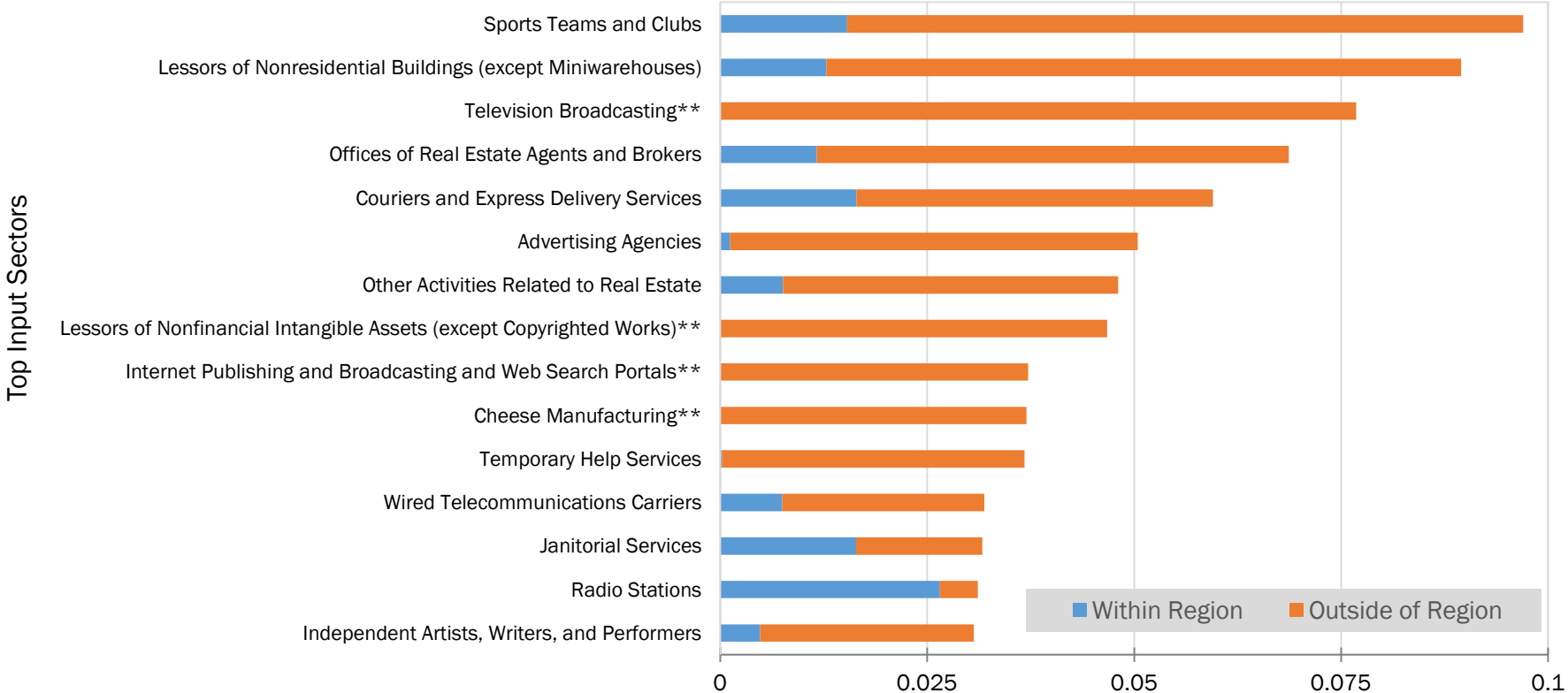
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Sports Teams and Clubs *	\$0.10	16%	84%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.09	14%	86%
Television Broadcasting **	\$0.08	0%	100%
Offices of Real Estate Agents and Brokers	\$0.07	17%	83%
Couriers and Express Delivery Services *	\$0.06	28%	72%
Advertising Agencies *	\$0.05	2%	98%
Other Activities Related to Real Estate	\$0.05	16%	84%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.05	0%	100%
Internet Publishing and Broadcasting and Web Search Portals **	\$0.04	0%	100%
Cheese Manufacturing **	\$0.04	0%	100%
Temporary Help Services*	\$0.04	1%	99%
Wired Telecommunication Carriers	\$0.03	23%	77%
Janitorial Services	\$0.03	52%	48%
Radio Stations	\$0.03	85%	15%
Independent Artists, Writers, and Performers	\$0.03	16%	84%

Note: \*industry sector has less than 10 jobs as calculated by EMSI; \*\* industry sector is not present in the region.

# Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

## Arts, Entertainment, Recreation And Visitor Industries Cluster

Leakage Analysis, 2013



Note: \*\* industry sector is not present in the region.

\$ Millions

section 03

## Top Occupations: Green Hills Heritage Highway, MO

### Arts, Entertainment, Recreation And Visitor Industries Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Maids and Housekeeping Cleaners	20	43%	\$8	Less than high school
Lodging Managers	18	0%	\$11	High school diploma or equivalent
Hotel, Motel, and Resort Desk Clerks	17	55%	\$8	High school diploma or equivalent
Musicians and Singers	15	36%	\$14	High school diploma or equivalent
Writers and Authors	11	22%	\$13	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient data (<10 jobs) for Cooks, Institution and Cafeteria; Cooks, Restaurant; Cooks, Short Order; Food Preparation Workers; First-Line Supervisors of Food Preparation and Serving Workers; Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers; Sound Engineering Technicians; Photographers; Massage Therapists; and Security Guards.

## Shift-Share Analysis by Top Industry Sectors: Green Hills Heritage Highway, MO

### Education And Knowledge Creation Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Newspaper Publishers	52	4	-16	↑ 5
All Other Miscellaneous Schools and Instruction	11	0	0	↑ 10

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient data (<10 jobs) for Cosmetology and Barber Schools; Apprenticeship Training; Other Technical and Trade Schools; Sports and Recreation Instruction; Educational Support Services; Exam Preparation and Tutoring; Fine Arts Schools; Professional and Management Development Training; Computer Training; and Colleges, Universities, and Professional Schools.

## Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

### Education And Knowledge Creation Cluster

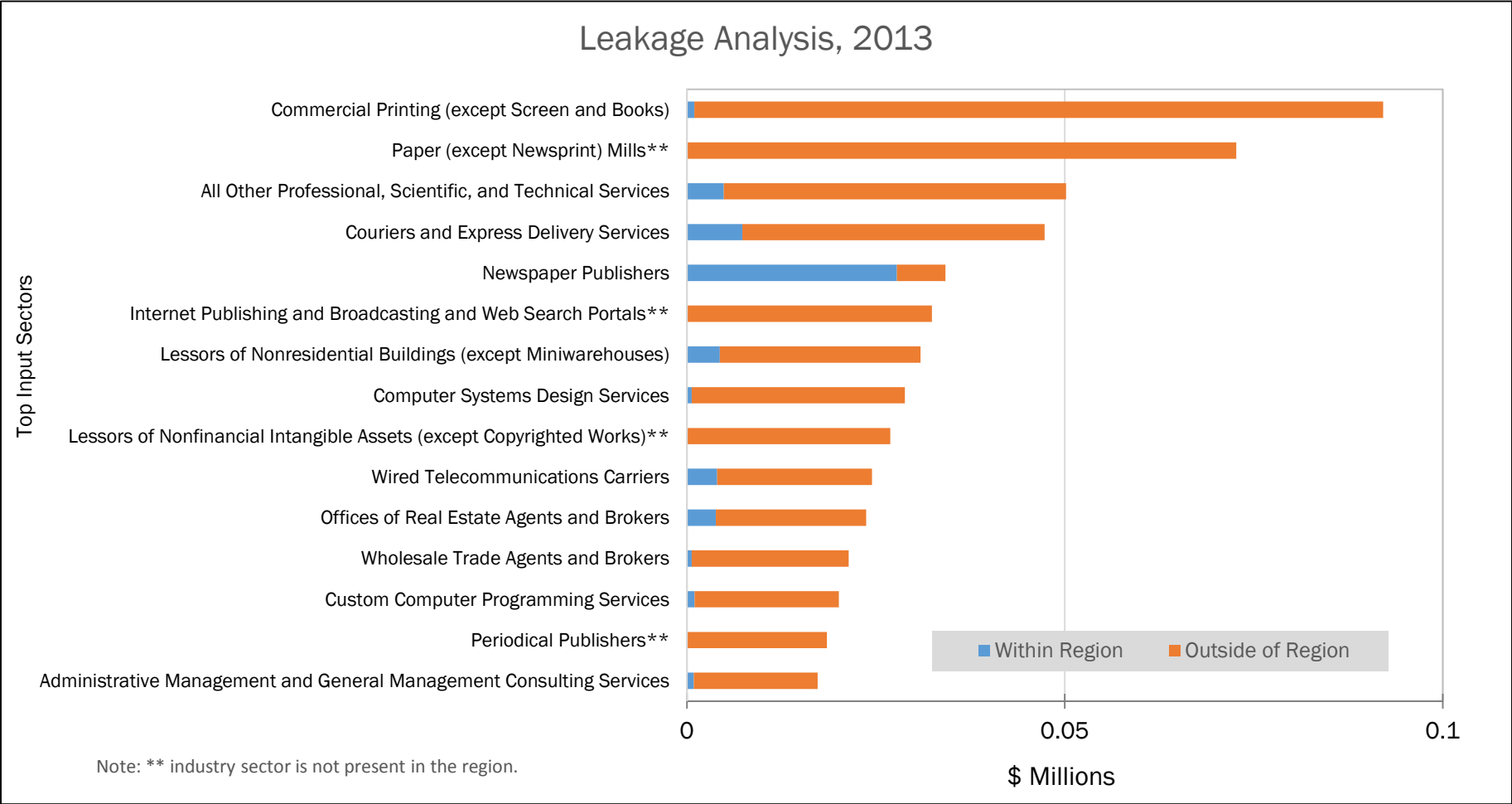
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Commercial Printing (except Screen and Books) *	\$0.09	1%	99%
Paper (except Newsprint) Mills **	\$0.07	0%	100%
All Other Professional, Scientific, and Technical Services	\$0.05	10%	90%
Couriers and Express Delivery Services *	\$0.05	16%	84%
Newspaper Publishers	\$0.03	81%	19%
Internet Publishing and Broadcasting and Web Search Portals **	\$0.03	0%	100%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.03	14%	86%
Computer Systems Design Services *	\$0.03	2%	98%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.03	0%	100%
Wired Telecommunications Carriers	\$0.02	16%	84%
Offices of Real Estate Agents and Brokers	\$0.02	16%	84%
Wholesale Trade Agents and Brokers	\$0.02	3%	97%
Custom Computer Programming Services	\$0.02	5%	95%
Periodical Publishers**	\$0.02	0%	100%
Administrative Management and General Management Consulting Services	\$0.02	5%	95%

Note: \*industry sector has less than 10 jobs as calculated by EMSI; \*\* industry sector is not present in the region.

#### section 03

# Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

## Education And Knowledge Creation Cluster



## Top Occupations: Green Hills Heritage Highway, MO

### Education And Knowledge Creation Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Self-Enrichment Education Teachers	14	56%	\$14	High school diploma or equivalent
Teachers and Instructors, All Other	12	71%	\$19	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient data (<10 jobs) for Billing and Posting Clerks; Bookkeeping, Accounting, and Auditing Clerks; Editors; First-Line Supervisors of Production and Operating Workers; Printing Press Operators; Writers and Authors; Reporters and Correspondents; First-Line Supervisors of Office and Administrative Support Workers; Maintenance and Repair Workers, General; Coaches and Scouts; Light Truck or Delivery Services Drivers; Door-to-Door Sales Workers, News and Street Vendors, and Related Workers; and Driver/Sales Workers.

## Shift-Share Analysis by Top Industry Sectors: Green Hills Heritage Highway, MO

### Transportation Equipment Manufacturing Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Motor Vehicle Metal Stamping	196	9	38	↑ 33
Other Motor Vehicle Parts Manufacturing	122	11	31	-66

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient data (<10 jobs) for Travel Trailer and Camper Manufacturing. The other sectors, such as, Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing; Guided Missile and Space Vehicle Manufacturing; Other Aircraft Parts and Auxiliary Equipment Manufacturing; Aircraft Engine and Engine Parts Manufacturing; Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing; Ship Building and Repairing; Military Armored Vehicle, Tank, and Tank Component Manufacturing; All Other Transportation Equipment Manufacturing; Motorcycle, Bicycle, and Parts Manufacturing; Boat Building; Aircraft Manufacturing; and Railroad Rolling Stock Manufacturing, are not present in the region.



## Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

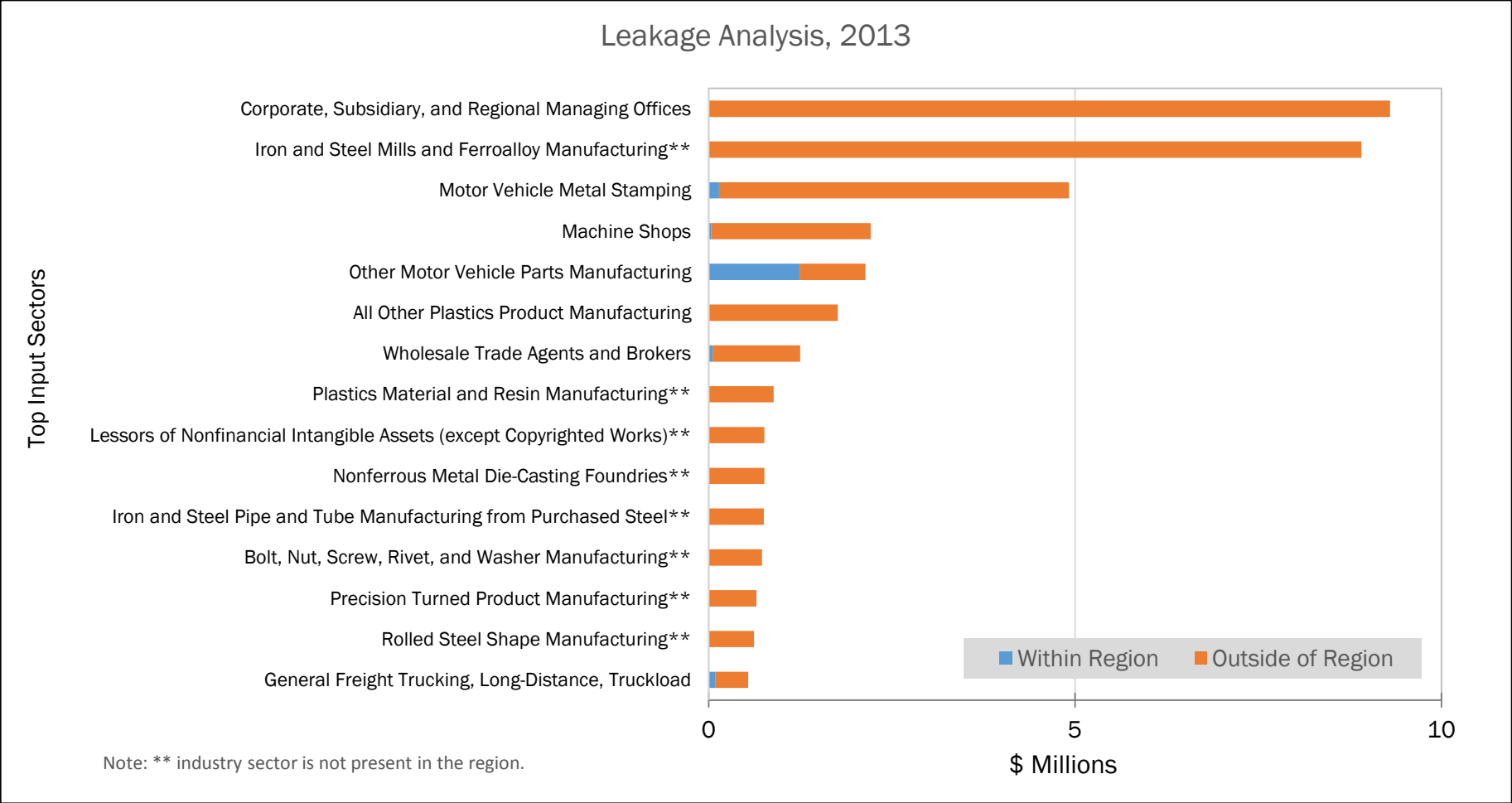
### Transportation Equipment Manufacturing Cluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$9.30	0%	100%
Iron and Steel Mills and Ferroalloy Manufacturing **	\$8.91	0%	100%
Motor Vehicle Metal Stamping	\$4.92	3%	97%
Machine Shops *	\$2.21	1%	99%
Other Motor Vehicle Parts Manufacturing	\$2.14	58%	42%
All Other Plastics Product Manufacturing *	\$1.76	1%	99%
Wholesale Trade Agents and Brokers	\$1.25	5%	95%
Plastics Material and Resin Manufacturing**	\$0.89	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.76	0%	100%
Nonferrous Metal Die-Casting Foundries **	\$0.76	0%	100%
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel **	\$0.76	0%	100%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing **	\$0.73	0%	100%
Precision Turned Product Manufacturing **	\$0.65	0%	100%
Rolled Steel Shape Manufacturing **	\$0.62	0%	100%
General Freight Trucking, Long-Distance, Truckload	\$0.54	18%	82%

Note: \*industry sector has less than 10 jobs as calculated by EMSI; \*\* industry sector is not present in the region.

# Top 15 Inputs by Dollars: Green Hills Heritage Highway, MO

## Transportation Equipment Manufacturing Cluster



## Top Occupations: Green Hills Heritage Highway, MO

### Transportation Equipment Manufacturing Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Team Assemblers	36	9%	\$13	High school diploma or equivalent
Machinists	20	33%	\$16	High school diploma or equivalent
Assemblers and Fabricators, All Other	15	36%	\$12	High school diploma or equivalent
Tool and Die Makers	14	40%	\$20	High school diploma or equivalent
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	13	18%	\$16	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	13	30%	\$23	Postsecondary non-degree award
Laborers and Freight, Stock, and Material Movers, Hand	10	25%	\$11	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient data (<10 jobs) for Stationary Engineers and Boiler Operators; Shipping, Receiving, and Traffic Clerks; Production, Planning, and Expediting Clerks; Mechanical Engineering Technicians; Stock Clerks and Order Fillers; Electrical and Electronics Engineering Technicians; Industrial Engineering Technicians; and Upholsterers.

# Report Contributors

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