



Target Industry Cluster Analysis

Mount Rogers Region, Virginia

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01 overview

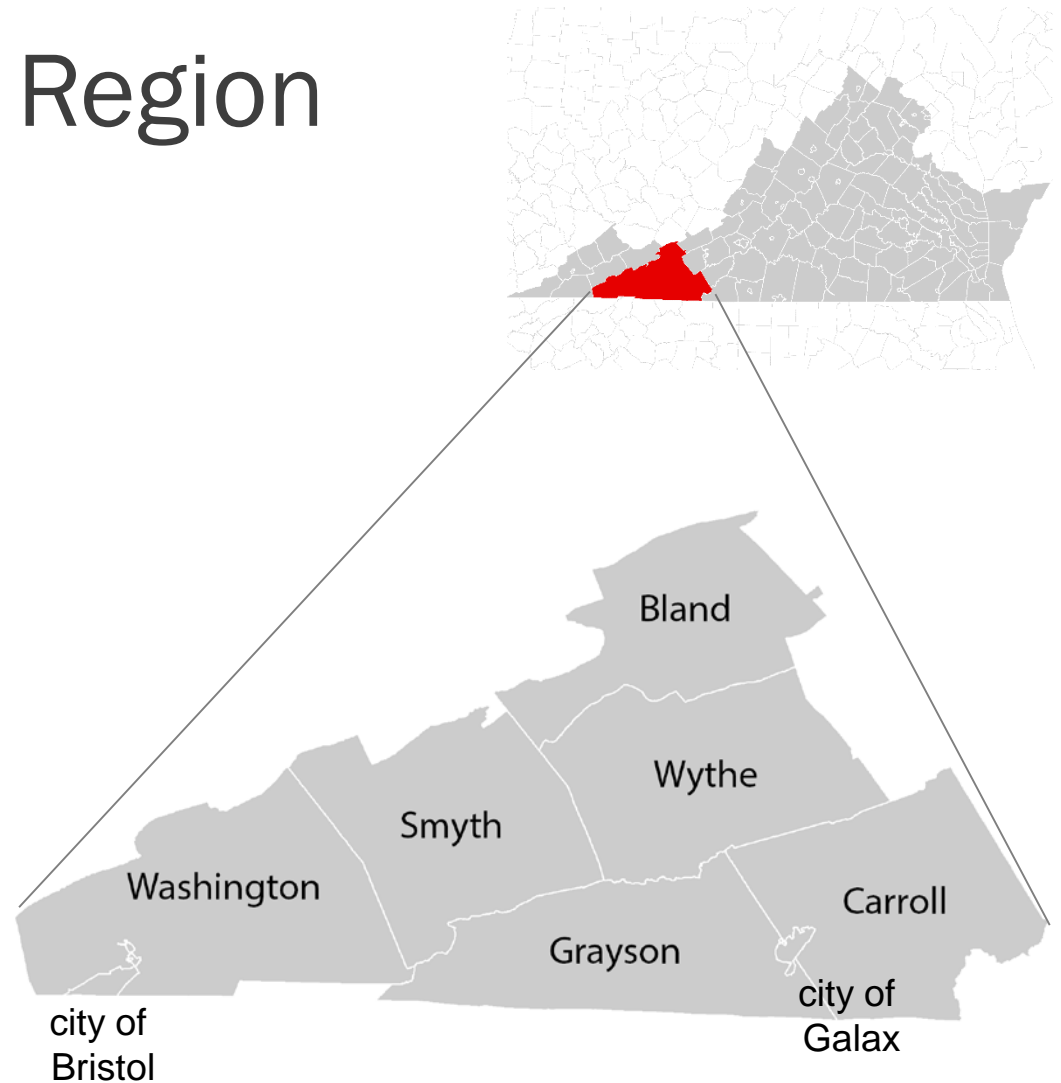
Mount Rogers Region, VA

Overview

Mount Rogers Region

The Mount Rogers Region is comprised of six Virginia counties and two cities. Interstate I-81 passes through the central part of the region.

- Bland
- Carroll
- Grayson
- Smyth
- Washington
- Wythe Counties
- city of Bristol
- city of Galax



02 target industry cluster

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

**Agribusiness, Food
Processing and Technology
Manufacturing Supercluster
Biomedical/Biotechnical**

Shift-Share Analysis by Top Industry Sectors: Mount Rogers Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	1,004	81	2	83	-63	-146
Independent Artists, Writers, and Performers	252	20	10	30	-10	-40
Golf Courses and Country Clubs	183	11	-5	6	34	↑ 28
Theater Companies and Dinner Theaters	177	12	13	25	15	-10
Fitness and Recreational Sports Centers	147	12	6	18	-9	-27
Sporting and Recreational Goods and Supplies Merchant Wholesalers	127	12	14	26	-37	-63
Television Broadcasting	90	12	-1	11	-69	-80
Other Spectator Sports	80	7	6	13	-14	-27
Radio Stations	74	5	-3	2	2	0
All Other Amusement and Recreation Industries	64	5	13	18	-6	-24
RV (Recreational Vehicle) Parks and Campgrounds	45	3	3	6	6	0
Sporting and Athletic Goods Manufacturing	44	11	-19	-8	-106	-98
Motion Picture Theaters (except Drive-Ins)	40	4	-9	-5	-10	-5
Museums	37	2	2	4	7	↑ 3
Bowling Centers	33	6	-8	-2	-46	-44

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Mount Rogers Region, VA

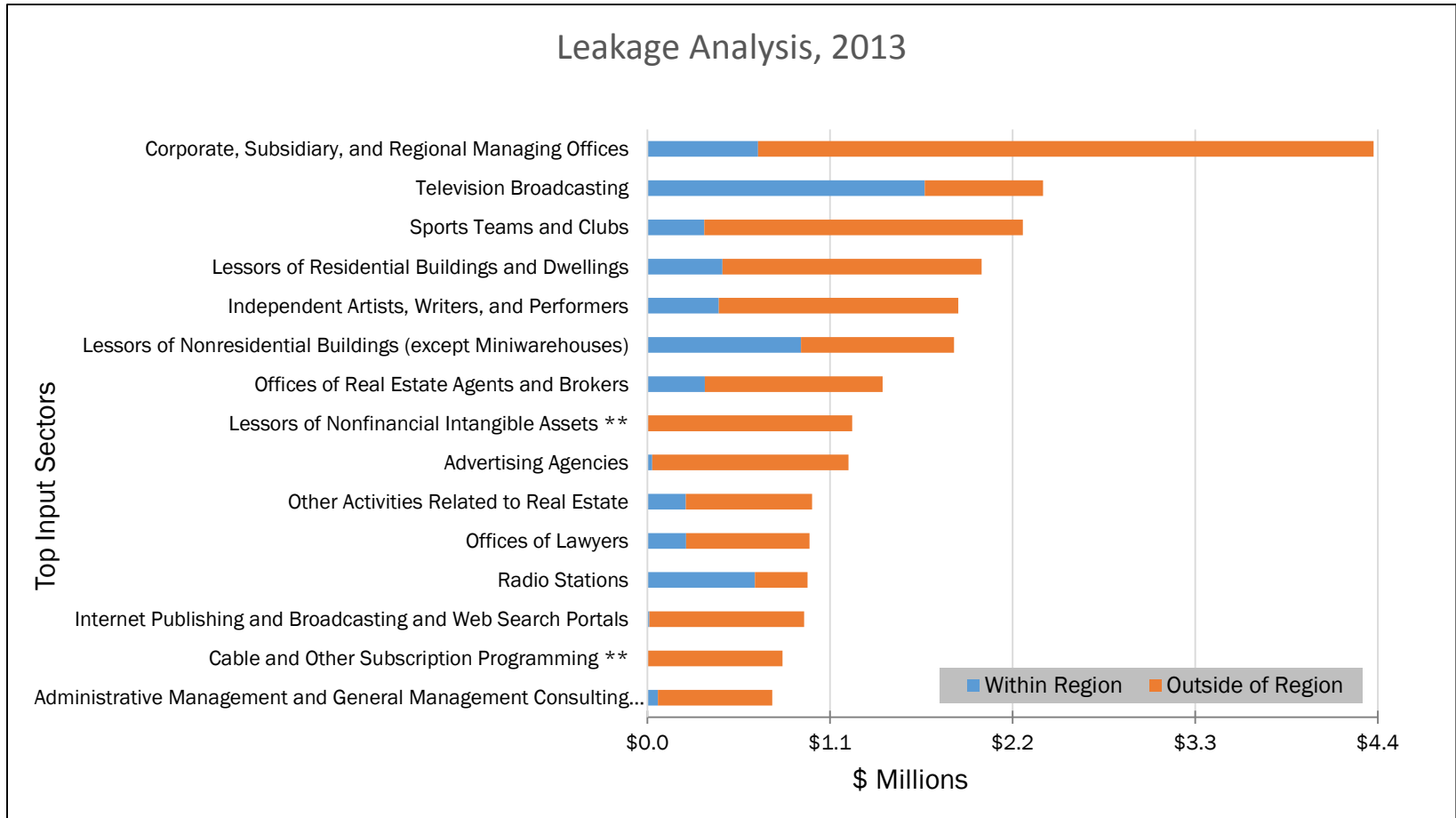
Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$4.38	15%	85%
Television Broadcasting	\$2.38	70%	30%
Sports Teams and Clubs	\$2.26	15%	85%
Lessors of Residential Buildings and Dwellings	\$2.01	22%	78%
Independent Artists, Writers, and Performers	\$1.87	23%	77%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$1.85	50%	50%
Offices of Real Estate Agents and Brokers	\$1.42	24%	76%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$1.23	0%	100%
Advertising Agencies *	\$1.21	2%	98%
Other Activities Related to Real Estate	\$0.99	23%	77%
Offices of Lawyers	\$0.98	24%	76%
Radio Stations	\$0.97	67%	33%
Internet Publishing and Broadcasting and Web Search Portals *	\$0.94	1%	99%
Cable and Other Subscription Programming **	\$0.81	0%	100%
Administrative Management and General Management Consulting Services	\$0.75	9%	91%

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: Mount Rogers Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster



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

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Top Occupations: Mount Rogers Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Maids and Housekeeping Cleaners	255	-6%	\$7.8	Less than high school
Hotel, Motel, and Resort Desk Clerks	182	-8%	\$8.2	High school diploma or equivalent
Musicians and Singers	97	0%	\$15.0	High school diploma or equivalent
Lodging Managers	96	-19%	\$11.2	High school diploma or equivalent
Maintenance and Repair Workers, General	88	-8%	\$15.3	High school diploma or equivalent
Waiters and Waitresses	78	-8%	\$8.6	Less than high school
Recreation Workers	78	32%	\$10.6	Bachelor's degree
Writers and Authors	71	-13%	\$13.6	Bachelor's degree
Landscaping and Groundskeeping Workers	70	-10%	\$9.3	Less than high school
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	45	-2%	\$9.1	Less than high school
Fitness Trainers and Aerobics Instructors	41	-5%	\$12.1	High school diploma or equivalent
Cashiers	38	-21%	\$8.7	Less than high school
Producers and Directors	38	-14%	\$17.9	Bachelor's degree
Cooks, Restaurant	37	-5%	\$9.0	Less than high school
Office Clerks, General	37	-18%	\$11.1	High school diploma or equivalent

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

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Shift-Share Analysis by Top Industry Sectors: Mount Rogers Region, VA

Agribusiness, Food Processing and Technology Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Animal Production	3,684	279	-356	-77	15	↑ 92
Crop Production	1,492	117	-105	12	-50	-62
Soft Drink Manufacturing	612	42	-51	-9	52	↑ 61
Other Snack Food Manufacturing	240	15	6	21	49	↑ 28
Farm Labor Contractors and Crew Leaders	111	7	6	13	14	↑ 1
Farm Supplies Merchant Wholesalers	93	8	0	8	-19	-27
Wineries	89	4	8	12	38	↑ 26
Farm and Garden Machinery and Equipment Merchant Wholesalers	67	5	0	5	0	-5
Perishable Prepared Food Manufacturing	35	0	0	0	34	↑ 34
Soil Preparation, Planting, and Cultivating	33	2	3	5	7	↑ 2
Other Farm Product Raw Material Merchant Wholesalers	29	1	0	1	8	↑ 7
Bottled Water Manufacturing	25	0	0	0	24	↑ 24
Livestock Merchant Wholesalers	24	1	-1	0	17	↑ 17
Nonchocolate Confectionery Manufacturing	19	3	1	4	-16	-20
Fruit and Vegetable Canning	17	0	0	0	17	↑ 17

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Mount Rogers Region, VA

Agribusiness, Food Processing and Technology Cluster

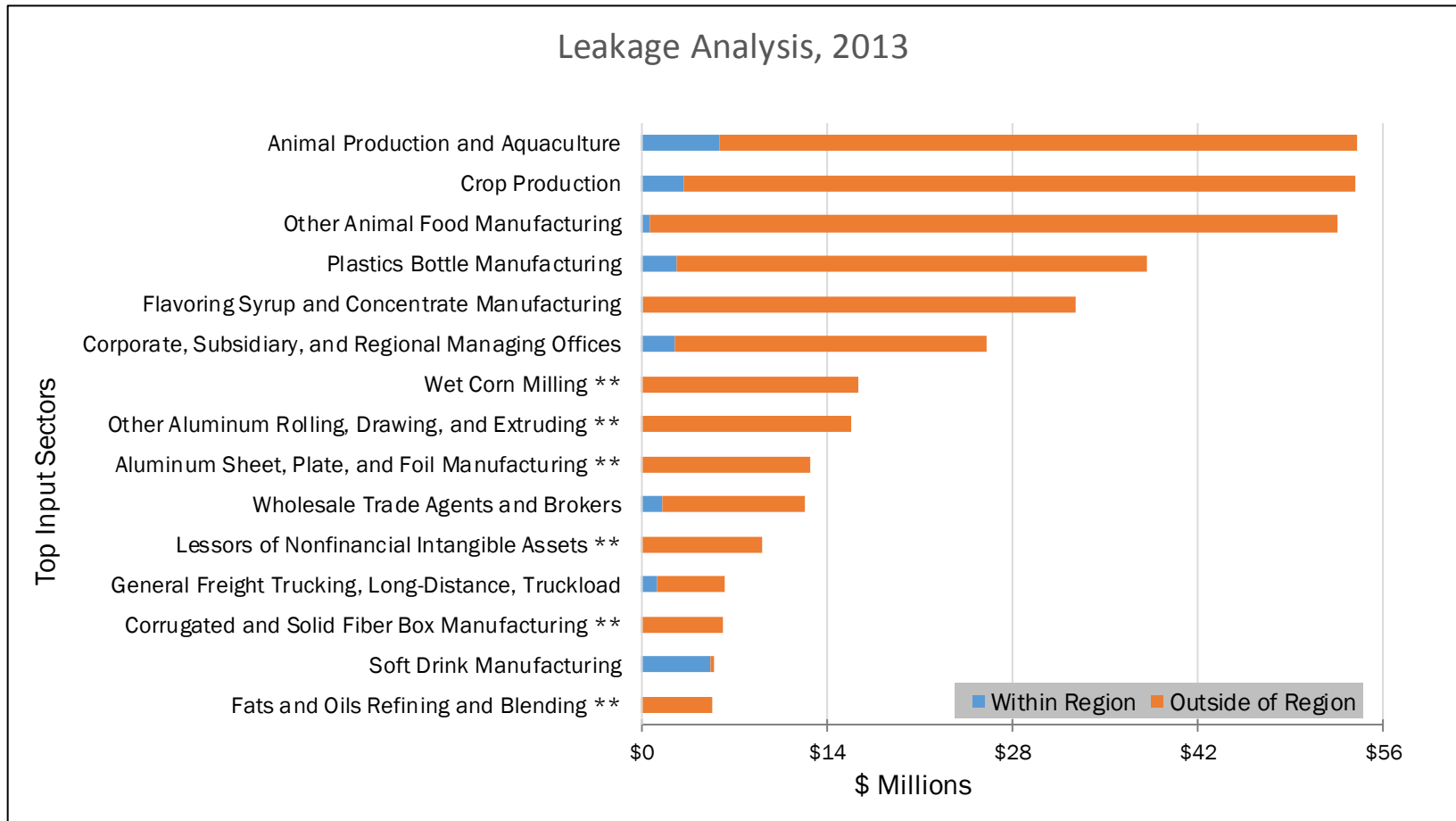
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Animal Production and Aquaculture	\$54.12	11%	89%
Crop Production	\$53.94	6%	94%
Other Animal Food Manufacturing *	\$52.63	1%	99%
Plastics Bottle Manufacturing	\$38.26	7%	93%
Flavoring Syrup and Concentrate Manufacturing *	\$32.77	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$26.09	10%	90%
Wet Corn Milling **	\$16.41	0%	100%
Other Aluminum Rolling, Drawing, and Extruding **	\$15.87	0%	100%
Aluminum Sheet, Plate, and Foil Manufacturing **	\$12.78	0%	100%
Wholesale Trade Agents and Brokers	\$12.31	13%	87%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$9.11	0%	100%
General Freight Trucking, Long-Distance, Truckload	\$6.25	19%	81%
Corrugated and Solid Fiber Box Manufacturing **	\$6.08	0%	100%
Soft Drink Manufacturing	\$5.52	94%	6%
Fats and Oils Refining and Blending **	\$5.41	0%	100%

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

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Top 15 Inputs by Dollars: Mount Rogers Region, VA

Agribusiness, Food Processing and Technology Cluster



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

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Top Occupations: Mount Rogers Region, VA

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	4,653	-1%	\$8.5	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	284	7%	\$8.6	Less than high school
Packaging and Filling Machine Operators and Tenders	118	11%	\$11.5	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	85	10%	\$20.9	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	62	17%	\$16.6	Postsecondary non-degree award
Demonstrators and Product Promoters	53	20%	\$19.7	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	53	18%	\$11.3	Less than high school
Bookkeeping, Accounting, and Auditing Clerks	51	-2%	\$13.5	High school diploma or equivalent
Industrial Machinery Mechanics	49	29%	\$17.6	High school diploma or equivalent
Driver/Sales Workers	49	17%	\$12.7	High school diploma or equivalent
Industrial Truck and Tractor Operators	49	26%	\$14.8	Less than high school
Animal Trainers	45	-18%	\$9.2	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	42	17%	\$22.3	Postsecondary non-degree award
Office Clerks, General	40	25%	\$11.1	High school diploma or equivalent
Managers, All Other	39	22%	\$18.0	High school diploma or equivalent

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

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Shift-Share Analysis by Top Industry Sectors: Mount Rogers Region, VA

Manufacturing Supercluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014	
		A	B	C=A+B	D	D-C	
Truck Trailer Manufacturing	1,678	58	451	509	914	↑	405
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	678	70	-76	-6	-244		-238
Other Aircraft Parts and Auxiliary Equipment Manufacturing	604	54	7	61	-101		-162
Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing	562	16	37	53	353	↑	300
Power, Distribution, and Specialty Transformer Manufacturing	538	58	-46	12	-232		-244
Plate Work Manufacturing	473	27	9	36	113	↑	77
Mining Machinery and Equipment Manufacturing	427	27	44	71	76	↑	5
Machine Shops	250	19	37	56	-3		-59
Switchgear and Switchboard Apparatus Manufacturing	249	20	-12	8	-21		-29
Travel Trailer and Camper Manufacturing	247	2	9	11	225	↑	214
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	238	5	19	24	169	↑	145
Overhead Traveling Crane, Hoist, and Monorail System Manufacturing	225	16	17	33	12		-21
Metal Can Manufacturing	187	21	-34	-13	-89		-76
Nonferrous Metal Die-Casting Foundries	171	11	34	45	21		-24
Cutting Tool and Machine Tool Accessory Manufacturing	164	19	49	68	-86		-154

Note: Upward arrow (↑) indicates regional competitiveness..

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Top 15 Inputs by Dollars: Mount Rogers Region, VA

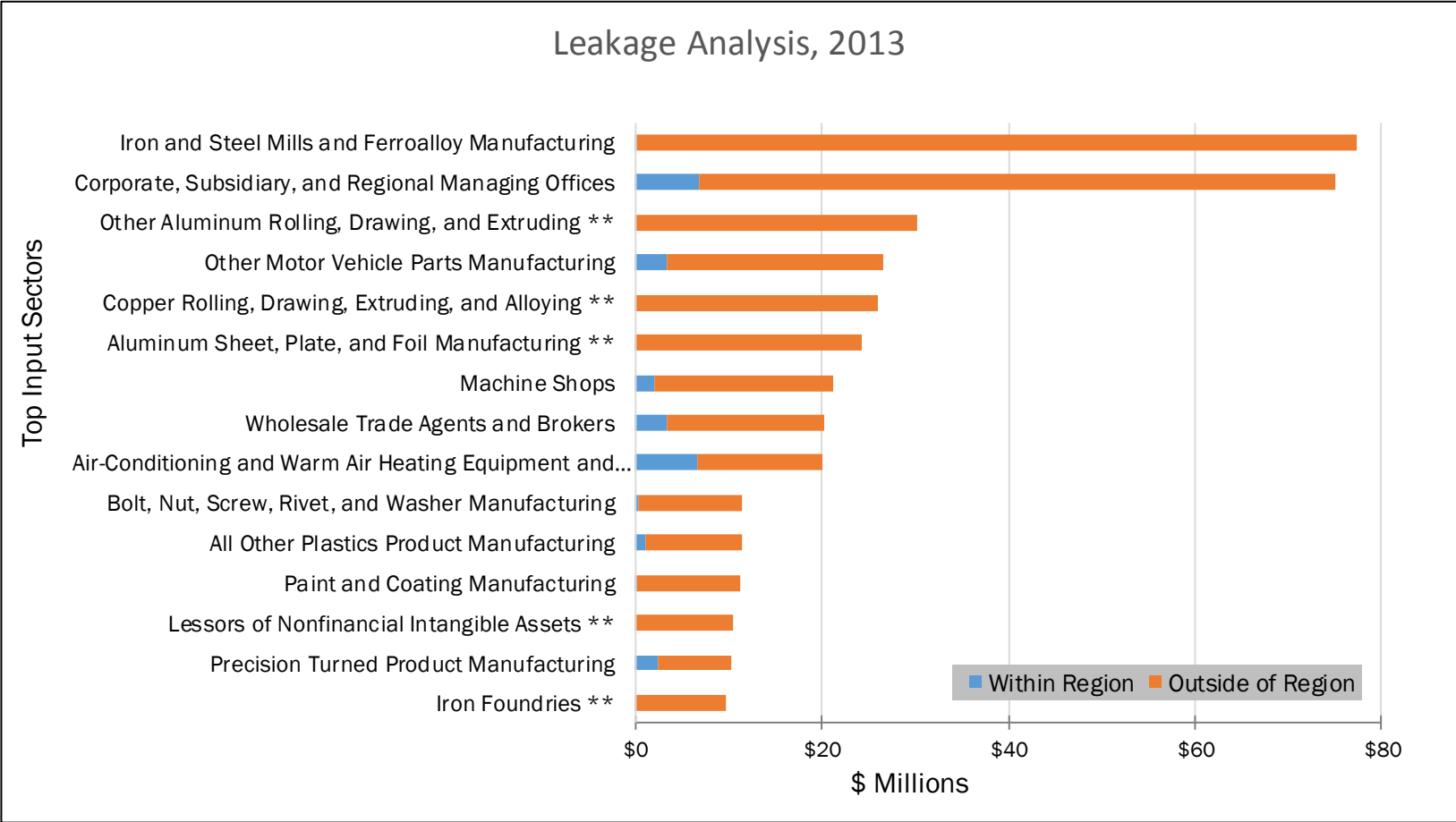
Manufacturing Supercluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Iron and Steel Mills and Ferroalloy Manufacturing	\$77.33	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$74.94	9%	91%
Other Aluminum Rolling, Drawing, and Extruding **	\$30.12	0%	100%
Other Motor Vehicle Parts Manufacturing	\$26.62	13%	87%
Copper Rolling, Drawing, Extruding, and Alloying **	\$26.00	0%	100%
Aluminum Sheet, Plate, and Foil Manufacturing **	\$24.26	0%	100%
Machine Shops	\$21.28	10%	90%
Wholesale Trade Agents and Brokers	\$20.24	17%	83%
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	\$20.11	33%	67%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing	\$11.44	3%	97%
All Other Plastics Product Manufacturing	\$11.41	10%	90%
Paint and Coating Manufacturing *	\$11.23	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$10.55	0%	100%
Precision Turned Product Manufacturing	\$10.25	23%	77%
Iron Foundries **	\$9.67	0%	100%

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: Mount Rogers Region, VA

Manufacturing Supercluster



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

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Source: EMSI Class of Worker 2014.4 (QCEW, non -QCEW, self-employed and extended proprietors).

Top Occupations: Mount Rogers Region, VA

Manufacturing Supercluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Team Assemblers	1,028	28%	\$16.5	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	612	39%	\$16.8	High school diploma or equivalent
Machinists	424	4%	\$17.4	High school diploma or equivalent
Electrical and Electronic Equipment Assemblers	387	-3%	\$11.5	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	280	16%	\$22.3	Postsecondary non-degree award
Electromechanical Equipment Assemblers	258	0%	\$14.6	High school diploma or equivalent
Mechanical Engineers	247	6%	\$39.2	Bachelor's degree
Structural Metal Fabricators and Fitters	236	28%	\$14.9	High school diploma or equivalent
Assemblers and Fabricators, All Other	210	59%	\$11.6	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	207	11%	\$14.8	High school diploma or equivalent
Maintenance and Repair Workers, General	151	21%	\$15.3	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	130	14%	\$20.9	High school diploma or equivalent
Office Clerks, General	121	11%	\$11.1	High school diploma or equivalent
Industrial Machinery Mechanics	111	31%	\$17.6	High school diploma or equivalent
Shipping, Receiving, and Traffic Clerks	108	11%	\$11.6	High school diploma or equivalent

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

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Shift-Share Analysis by Top Industry Sectors: Mount Rogers Region, VA

Biomedical/Biotechnical (Life Sciences) Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
General Medical and Surgical Hospitals	1,512	177	-111	66	-819	-885
Nursing Care Facilities (Skilled Nursing Facilities)	1,318	110	-102	8	-125	-133
Home Health Care Services	652	35	90	125	195	↑ 70
Pharmacies and Drug Stores	493	40	-50	-10	-29	-19
Ambulance Services	367	14	4	18	176	↑ 158
Assisted Living Facilities for the Elderly	277	20	20	40	13	-27
Continuing Care Retirement Communities	233	19	24	43	-20	-63
Residential Mental Health and Substance Abuse Facilities	115	6	5	11	30	↑ 19
Cosmetics, Beauty Supplies, and Perfume Stores	112	7	7	14	20	↑ 6
Psychiatric and Substance Abuse Hospitals	70	3	-1	2	35	↑ 33
Residential Intellectual and Developmental Disability Facilities	58	2	0	2	37	↑ 35
Other Residential Care Facilities	57	6	-9	-3	-23	-20
Kidney Dialysis Centers	53	4	9	13	-2	-15
All Other Miscellaneous Ambulatory Health Care Services	49	1	3	4	33	↑ 29
Medical Laboratories	45	1	1	2	38	↑ 36

Note: Upward arrow (↑) indicates regional competitiveness..

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Top 15 Inputs by Dollars: Mount Rogers Region, VA

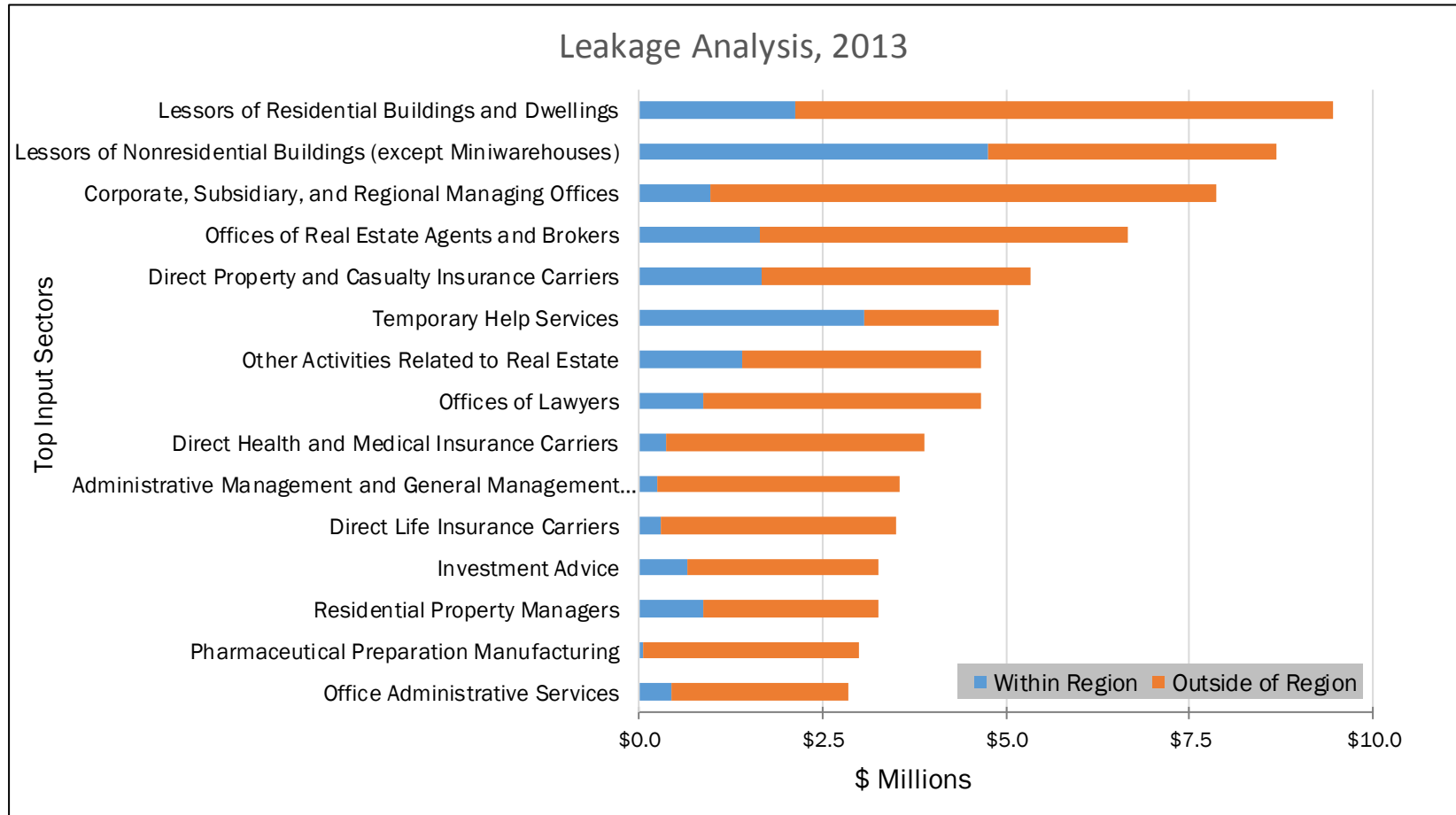
Biomedical/Biotechnical (Life Sciences) Cluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Lessors of Residential Buildings and Dwellings	\$9.46	23%	77%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$8.68	55%	45%
Corporate, Subsidiary, and Regional Managing Offices	\$7.87	12%	88%
Offices of Real Estate Agents and Brokers	\$6.66	25%	75%
Direct Property and Casualty Insurance Carriers	\$5.34	31%	69%
Temporary Help Services	\$4.90	63%	37%
Other Activities Related to Real Estate	\$4.66	30%	70%
Offices of Lawyers	\$4.65	19%	81%
Direct Health and Medical Insurance Carriers	\$3.88	10%	90%
Administrative Management and General Management Consulting Services	\$3.55	7%	93%
Direct Life Insurance Carriers	\$3.50	9%	91%
Investment Advice	\$3.26	20%	80%
Residential Property Managers	\$3.25	26%	74%
Pharmaceutical Preparation Manufacturing	\$3.00	2%	98%
Office Administrative Services	\$2.84	15%	85%

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: Mount Rogers Region, VA

Biomedical/Biotechnical (Life Sciences) Cluster



section 03

Top Occupations: Mount Rogers Region, VA

Biomedical/Biotechnical (Life Sciences) Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Nursing Assistants	769	-12%	\$10.1	Postsecondary non-degree award
Registered Nurses	574	-28%	\$23.9	Associate's degree
Personal Care Aides	496	28%	\$8.2	Less than high school
Licensed Practical and Licensed Vocational Nurses	429	-5%	\$16.1	Postsecondary non-degree award
Home Health Aides	325	27%	\$8.5	Less than high school
Emergency Medical Technicians and Paramedics	217	82%	\$11.2	Postsecondary non-degree award
Pharmacy Technicians	176	-5%	\$12.3	High school diploma or equivalent
Cashiers	126	-10%	\$8.7	Less than high school
Retail Salespersons	97	15%	\$9.9	Less than high school
Pharmacists	92	-12%	\$58.2	Doctoral or professional degree
Maids and Housekeeping Cleaners	89	-22%	\$7.8	Less than high school
First-Line Supervisors of Retail Sales Workers	83	8%	\$13.7	High school diploma or equivalent
Office Clerks, General	72	-15%	\$11.1	High school diploma or equivalent
Medical and Health Services Managers	68	-14%	\$34.9	Bachelor's degree
Ambulance Drivers and Attendants, Except Emergency Medical Technicians	63	103%	\$9.2	High school diploma or equivalent

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

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Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Report Contributors

This report was prepared by the Purdue Center for Regional Development, in partnership with the Southern Rural Development Center and USDA Rural Development, in support of the Stronger Economies Together program.



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This report was supported, in part, by grant from the USDA Rural Development through the auspices of the Southern Rural Development Center. It was produced in support of the Stronger Economies Together (SET) program.

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December 2015