



Regional Data Snapshot

Target Industry Clusters
SET Session 2

Kaysinger Basin Region, Missouri

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01 overview

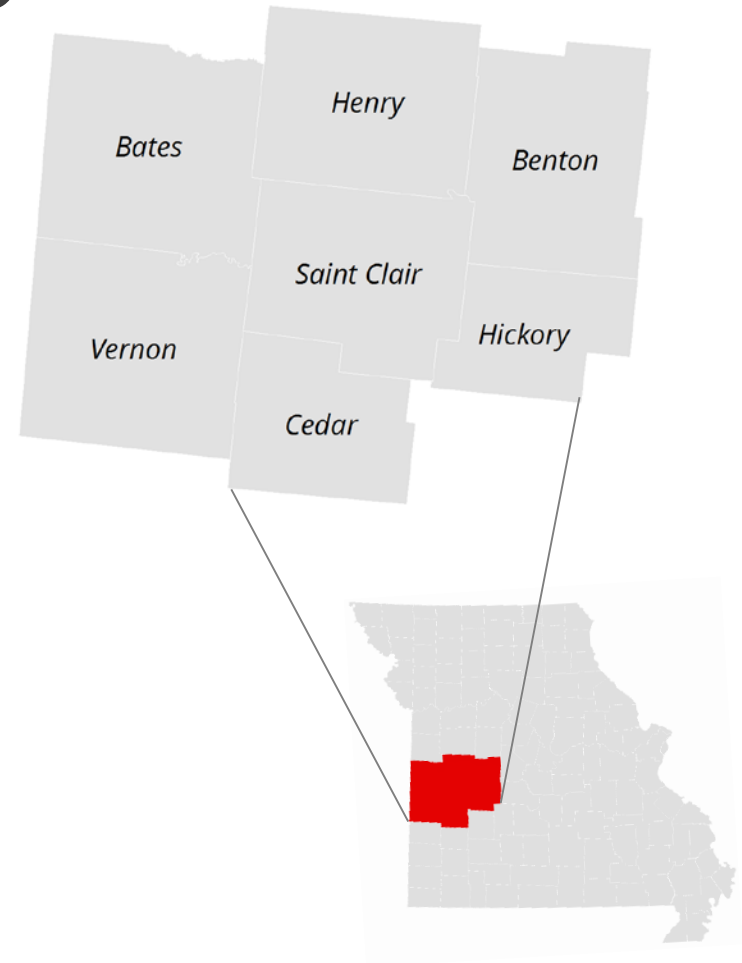
Kaysinger Basin, MO

Overview

Kaysinger Basin, MO

The Kaysinger Basin Region is comprised of seven Missouri counties. State Route 71 passes through Bates and Vernon counties connecting to Kansas City to the north. State Route 65 passes through Benton and Hickory counties connecting to Interstate 70 to the north and Interstate 44 in the south.

- Bates
- Benton
- Cedar
- Henry
- Hickory
- St. Clair
- Vernon



02 target industry clusters

**Agribusiness, Food Processing
and Technology**

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

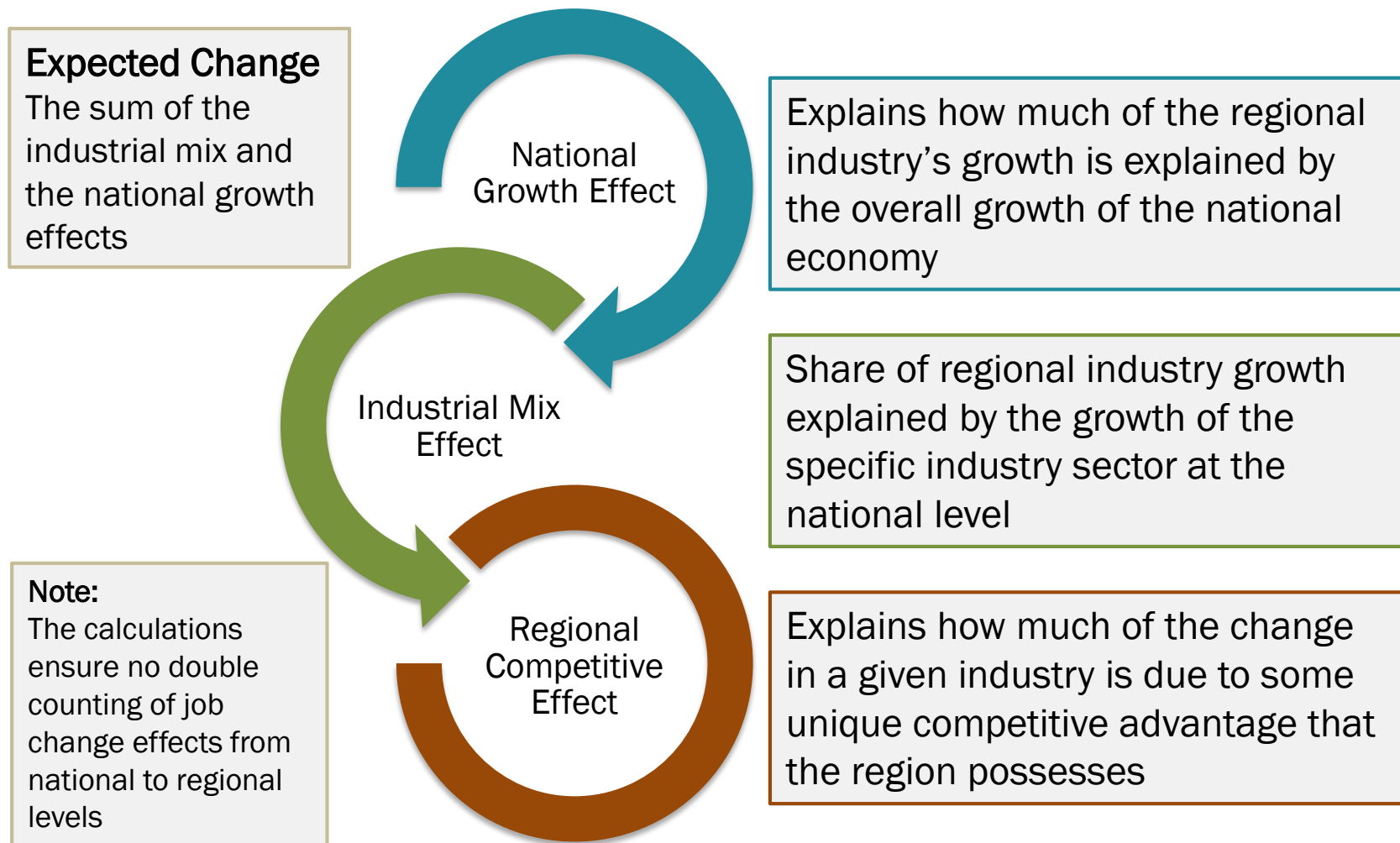
**Biomedical/Biotechnical
(Life Sciences)**

**Fabricated Metal Product
Manufacturing**

Transportation And Logistics

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Animal Production and Aquaculture	3,214	333	-391	-58	-592	-534
Crop Production	2,484	196	-153	43	240	↑ 197
Cheese Manufacturing	533	48	22	70	-21	-91
Postharvest Crop Activities (except Cotton Ginning)	215	8	1	9	128	↑ 119
Farm Management Services	213	17	10	27	22	-5
Farm Labor Contractors and Crew Leaders	184	11	12	23	56	↑ 33
Dog and Cat Food Manufacturing	149	0	0	0	149	↑ 149
Soil Preparation, Planting, and Cultivating	126	6	0	6	53	↑ 47
Farm Supplies Merchant Wholesalers	89	9	-2	7	-19	-26
Grain and Field Bean Merchant Wholesalers	87	3	0	3	51	↑ 48
Farm and Garden Machinery and Equipment Merchant Wholesalers	83	13	-6	7	-70	-77
Food Product Machinery Manufacturing	66	4	2	6	24	↑ 18
Meat Processed from Carcasses	50	1	0	1	40	↑ 39
Soybean and Other Oilseed Processing	31	0	0	0	31	↑ 31
Livestock Merchant Wholesalers	27	9	-18	-9	-81	-72

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Crop Production
- Dog and Cat Food Manufacturing
- Postharvest Crop Activities (except Cotton Ginning)
- Grain and Field Bean Merchant Wholesalers
- Soil Preparation, Planting, and Cultivating
- Meat Processed from Carcasses
- Farm Labor Contractors and Crew Leaders
- Soybean and Other Oilseed Processing
- Food Product Machinery Manufacturing

Industries that Underperformed

- Farm Management Services
- Farm Supplies Merchant Wholesalers
- Livestock Merchant Wholesalers
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Cheese Manufacturing
- Animal Production and Aquaculture

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Animal Production and Aquaculture	\$443.0	3,214	\$137,853	10.9
Crop Production	\$245.9	2,484	\$99,002	6.5
Cheese Manufacturing	\$361.0	533	\$677,140	46.0
Postharvest Crop Activities (except Cotton Ginning)	\$7.8	215	\$36,075	8.7
Farm Management Services	\$5.9	213	\$27,754	26.9
Farm Labor Contractors and Crew Leaders	\$1.1	184	\$6,085	2.2
Dog and Cat Food Manufacturing	\$90.0	149	\$604,974	23.7
Soil Preparation, Planting, and Cultivating	\$0.3	126	\$2,211	7.0
Farm Supplies Merchant Wholesalers	\$8.8	89	\$98,317	2.9
Grain and Field Bean Merchant Wholesalers	\$9.2	87	\$105,396	6.4
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$8.9	83	\$107,057	3.0
Food Product Machinery Manufacturing	\$11.6	66	\$175,472	13.4
Meat Processed from Carcasses	\$13.4	50	\$270,496	1.6
Soybean and Other Oilseed Processing	\$59.7	31	\$1,924,547	14.3
Livestock Merchant Wholesalers	\$0.5	27	\$17,311	5.4

Note: Sorted similarly as the shift-share analysis slide.

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Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

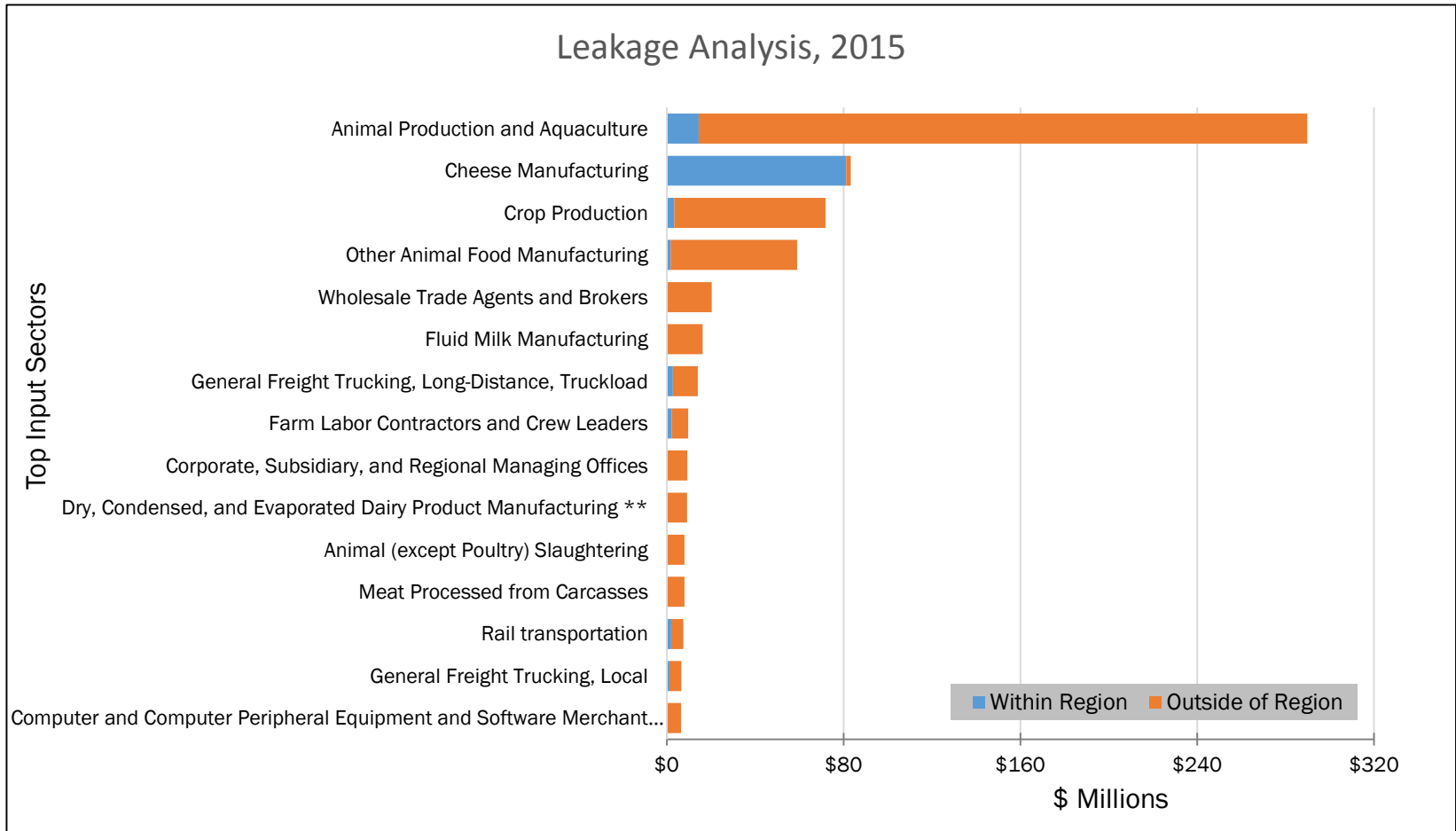
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Animal Production and Aquaculture	\$289.76	5%	95%
Cheese Manufacturing	\$83.29	98%	2%
Crop Production	\$71.82	5%	95%
Other Animal Food Manufacturing	\$58.98	3%	97%
Wholesale Trade Agents and Brokers	\$20.29	1%	99%
Fluid Milk Manufacturing *	\$16.27	0%	100%
General Freight Trucking, Long-Distance, Truckload	\$14.00	20%	80%
Farm Labor Contractors and Crew Leaders	\$9.74	24%	76%
Corporate, Subsidiary, and Regional Managing Offices	\$9.35	1%	99%
Dry, Condensed, and Evaporated Dairy Product Manufacturing **	\$9.23	0%	100%
Animal (except Poultry) Slaughtering *	\$8.07	0%	100%
Meat Processed from Carcasses	\$7.96	4%	96%
Rail transportation	\$7.52	27%	73%
General Freight Trucking, Local	\$6.63	19%	81%
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$6.49	1%	99%

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

Agribusiness, Food Processing and Technology



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

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	5,008	-10%	\$11.2	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	530	49%	\$10.0	No formal educational credential
Packaging and Filling Machine Operators and Tenders	116	5%	\$12.9	High school diploma or equivalent
Farmworkers, Farm, Ranch, and Aquacultural Animals	99	24%	\$11.2	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	89	14%	\$11.6	No formal educational credential
Heavy and Tractor-Trailer Truck Drivers	87	38%	\$15.0	Postsecondary nondegree award
Food Batchmakers	78	-16%	\$14.0	High school diploma or equivalent
Nonfarm Animal Caretakers	73	20%	\$9.0	High school diploma or equivalent
Animal Trainers	72	-19%	\$9.2	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	66	2%	\$14.1	Some college, no degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	65	35%	\$12.4	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	61	-12%	\$21.6	High school diploma or equivalent
Packers and Packagers, Hand	57	33%	\$11.1	No formal educational credential
Agricultural Equipment Operators	55	62%	\$12.2	No formal educational credential
Maintenance and Repair Workers, General	55	31%	\$13.6	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

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Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Arts, Entertainment, Recreation And Visitor Industries

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	273	20	5	25	47	↑ 22
Independent Artists, Writers, and Performers	101	12	0	12	-41	-53
Marinas	97	4	4	8	47	↑ 39
Golf Courses and Country Clubs	86	7	-1	6	8	↑ 2
RV (Recreational Vehicle) Parks and Campgrounds	77	4	3	7	28	↑ 21
Fitness and Recreational Sports Centers	75	9	8	17	-33	-50
Sporting and Athletic Goods Manufacturing	59	1	0	1	53	↑ 52
All Other Amusement and Recreation Industries	58	3	8	11	28	↑ 17
Radio Stations	44	3	-3	0	6	↑ 6
Racetracks	43	6	-15	-9	-24	-15
Other Spectator Sports	38	5	-3	2	-16	-18
Recreational and Vacation Camps (except Campgrounds)	35	3	2	5	-4	-9
Bowling Centers	32	5	-7	-2	-22	-20
Motion Picture Theaters (except Drive-Ins)	24	2	-2	0	-2	-2
Sporting and Recreational Goods and Supplies Merchant Wholesalers	24	3	3	6	-8	-14

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Arts, Entertainment, Recreation And Visitor Industries

Industries that Outperformed

- Sporting and Athletic Goods Manufacturing
- Marinas
- Hotels (except Casino Hotels) and Motels
- RV (Recreational Vehicle) Parks and Campgrounds
- All Other Amusement and Recreation Industries
- Radio Stations
- Golf Courses and Country Clubs

Industries that Underperformed

- Motion Picture Theaters (except Drive-Ins)
- Recreational and Vacation Camps (except Campgrounds)
- Sporting and Recreational Goods and Supplies Merchant Wholesalers
- Racetracks
- Other Spectator Sports
- Bowling Centers
- Fitness and Recreational Sports Centers
- Independent Artists, Writers, and Performers

Top Industry Sectors

Arts, Entertainment, Recreation And Visitor Industries

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Hotels (except Casino Hotels) and Motels	\$4.2	273	\$15,239	0.7
Independent Artists, Writers, and Performers	\$1.3	101	\$12,998	0.3
Marinas	\$3.7	97	\$38,032	6.4
Golf Courses and Country Clubs	\$2.1	86	\$24,790	0.8
RV (Recreational Vehicle) Parks and Campgrounds	\$0.6	77	\$8,464	7.1
Fitness and Recreational Sports Centers	\$0.8	75	\$10,414	0.4
Sporting and Athletic Goods Manufacturing	\$18.8	59	\$319,091	4.1
All Other Amusement and Recreation Industries	\$0.9	58	\$14,943	0.8
Radio Stations	\$3.1	44	\$70,435	1.7
Racetracks	\$0.5	43	\$12,629	2.6
Other Spectator Sports	\$0.3	38	\$9,089	0.8
Recreational and Vacation Camps (except Campgrounds)	\$0.3	35	\$9,044	3.5
Bowling Centers	\$0.3	32	\$9,821	1.6
Motion Picture Theaters (except Drive-Ins)	\$0.7	24	\$28,803	0.7
Sporting and Recreational Goods and Supplies Merchant Wholesalers	\$2.2	24	\$88,565	1.3

Note: Sorted similarly as the shift-share analysis slide.

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Top 15 Inputs by Dollars

Arts, Entertainment, Recreation And Visitor Industries

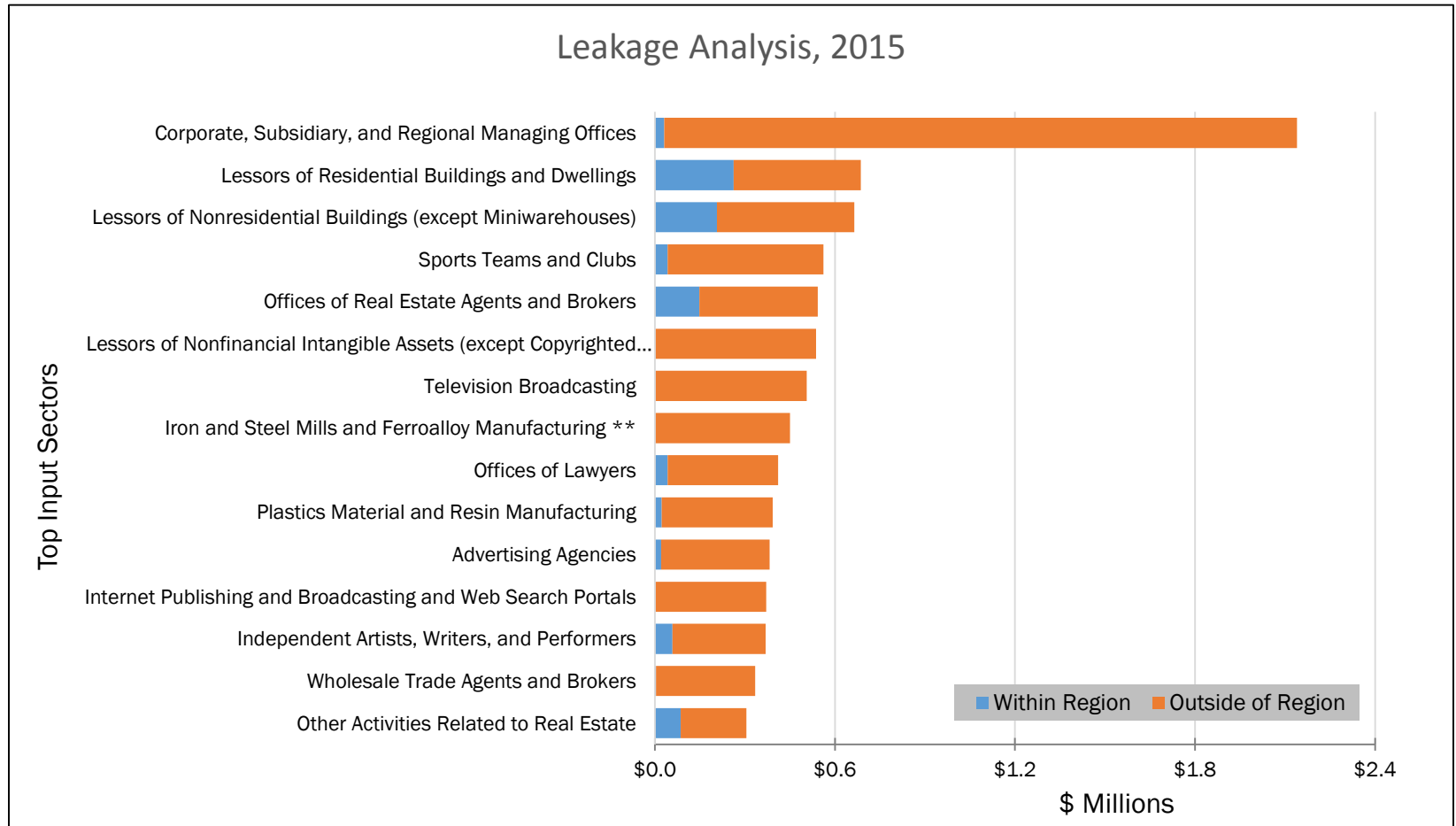
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$2.14	1%	99%
Lessors of Residential Buildings and Dwellings	\$0.69	38%	62%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.66	31%	69%
Sports Teams and Clubs	\$0.56	7%	93%
Offices of Real Estate Agents and Brokers	\$0.54	27%	73%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.54	0%	100%
Television Broadcasting *	\$0.51	0%	100%
Iron and Steel Mills and Ferroalloy Manufacturing **	\$0.45	0%	100%
Offices of Lawyers	\$0.41	10%	90%
Plastics Material and Resin Manufacturing *	\$0.39	6%	94%
Advertising Agencies *	\$0.38	5%	95%
Internet Publishing and Broadcasting and Web Search Portals *	\$0.37	0%	100%
Independent Artists, Writers, and Performers	\$0.37	16%	84%
Wholesale Trade Agents and Brokers	\$0.33	1%	99%
Other Activities Related to Real Estate	\$0.31	28%	72%

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

section 02

Top 15 Inputs by Dollars

Arts, Entertainment, Recreation And Visitor Industries



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

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Arts, Entertainment, Recreation And Visitor Industries

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Lodging Managers	79	10%	\$10.5	High school diploma or equivalent
Maids and Housekeeping Cleaners	78	24%	\$8.0	No formal educational credential
Fitness Trainers and Aerobics Instructors	54	20%	\$15.3	High school diploma or equivalent
Musicians and Singers	47	-22%	\$15.1	No formal educational credential
Writers and Authors	40	-26%	\$15.8	Bachelor's degree
Hotel, Motel, and Resort Desk Clerks	34	21%	\$8.9	High school diploma or equivalent
Landscaping and Groundskeeping Workers	34	21%	\$9.4	No formal educational credential
Tour Guides and Escorts	31	82%	\$12.6	High school diploma or equivalent
Amusement and Recreation Attendants	30	-3%	\$9.1	No formal educational credential
Coaches and Scouts	29	26%	\$12.1	Bachelor's degree
Waiters and Waitresses	28	8%	\$8.5	No formal educational credential
Fine Artists, Including Painters, Sculptors, and Illustrators	26	-28%	\$7.8	Bachelor's degree
Managers, All Other	24	118%	\$15.7	Bachelor's degree
Maintenance and Repair Workers, General	23	10%	\$13.6	High school diploma or equivalent
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	21	17%	\$10.2	No formal educational credential

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

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Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Biomedical/Biotechnical (Life Sciences)

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Nursing Care Facilities (Skilled Nursing Facilities)	1,028	87	-86	1	32	↑ 31
Psychiatric and Substance Abuse Hospitals	530	38	7	45	99	↑ 54
Outpatient Mental Health and Substance Abuse Centers	322	21	38	59	84	↑ 25
Pharmacies and Drug Stores	285	30	-32	-2	-63	-61
Home Health Care Services	200	9	23	32	96	↑ 64
Residential Intellectual and Developmental Disability Facilities	183	14	-2	12	21	↑ 9
Assisted Living Facilities for the Elderly	95	9	10	19	-8	-27
Other Residential Care Facilities	62	4	-5	-1	19	↑ 20
Continuing Care Retirement Communities	33	3	5	8	-2	-10
Food (Health) Supplement Stores	32	1	3	4	18	↑ 14
Ambulance Services	30	3	0	3	-3	-6
Cosmetics, Beauty Supplies, and Perfume Stores	24	2	1	3	6	↑ 3
All Other Health and Personal Care Stores	23	2	-1	1	-3	-4
Kidney Dialysis Centers	22	1	2	3	11	↑ 8
All Other Miscellaneous Ambulatory Health Care Services	14	1	2	3	5	↑ 2


Note: Upward arrow (↑) indicates regional competitiveness.

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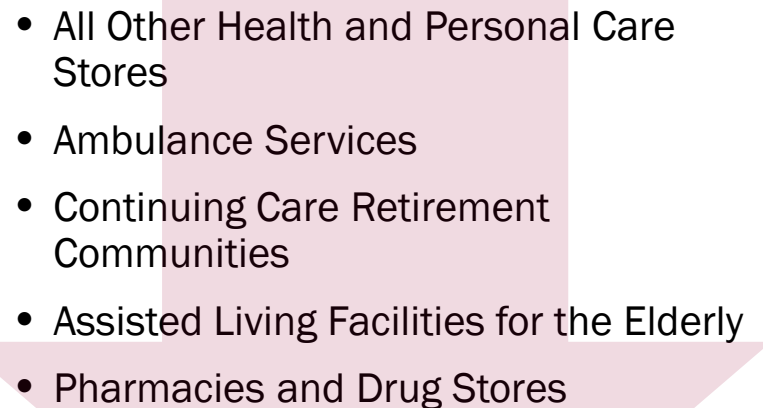
Shift-Share Analysis

Biomedical/Biotechnical (Life Sciences)

Industries that Outperformed

- 
- Home Health Care Services
 - Psychiatric and Substance Abuse Hospitals
 - Nursing Care Facilities (Skilled Nursing Facilities)
 - Outpatient Mental Health and Substance Abuse Centers
 - Other Residential Care Facilities
 - Food (Health) Supplement Stores
 - Residential Intellectual and Developmental Disability Facilities

Industries that Underperformed

- 
- All Other Health and Personal Care Stores
 - Ambulance Services
 - Continuing Care Retirement Communities
 - Assisted Living Facilities for the Elderly
 - Pharmacies and Drug Stores

Note: Kidney Dialysis Centers; Cosmetics, Beauty Supplies, and Perfume Stores; and All Other Miscellaneous Ambulatory Health Care Services also outperformed in the region.

section 02

Top Industry Sectors

Biomedical/Biotechnical (Life Sciences)

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Nursing Care Facilities (Skilled Nursing Facilities)	\$31.3	1,028	\$30,421	2.4
Psychiatric and Substance Abuse Hospitals	\$46.4	530	\$87,418	18.7
Outpatient Mental Health and Substance Abuse Centers	\$27.9	322	\$86,536	5.6
Pharmacies and Drug Stores	\$16.7	285	\$58,691	1.5
Home Health Care Services	\$2.8	200	\$13,803	0.4
Residential Intellectual and Developmental Disability Facilities	\$3.0	183	\$16,416	1.6
Assisted Living Facilities for the Elderly	\$2.7	95	\$28,706	0.8
Other Residential Care Facilities	\$0.8	62	\$12,814	1.4
Continuing Care Retirement Communities	\$0.7	33	\$20,846	0.3
Food (Health) Supplement Stores	\$0.7	32	\$22,679	1.5
Ambulance Services	\$1.6	30	\$55,221	0.6
Cosmetics, Beauty Supplies, and Perfume Stores	\$0.2	24	\$7,292	0.4
All Other Health and Personal Care Stores	\$0.9	23	\$40,831	1.0
Kidney Dialysis Centers	\$1.7	22	\$79,873	0.7
All Other Miscellaneous Ambulatory Health Care Services	\$0.6	14	\$44,171	0.6

Note: Sorted similarly as the shift-share analysis slide.

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Top 15 Inputs by Dollars

Biomedical/Biotechnical (Life Sciences)

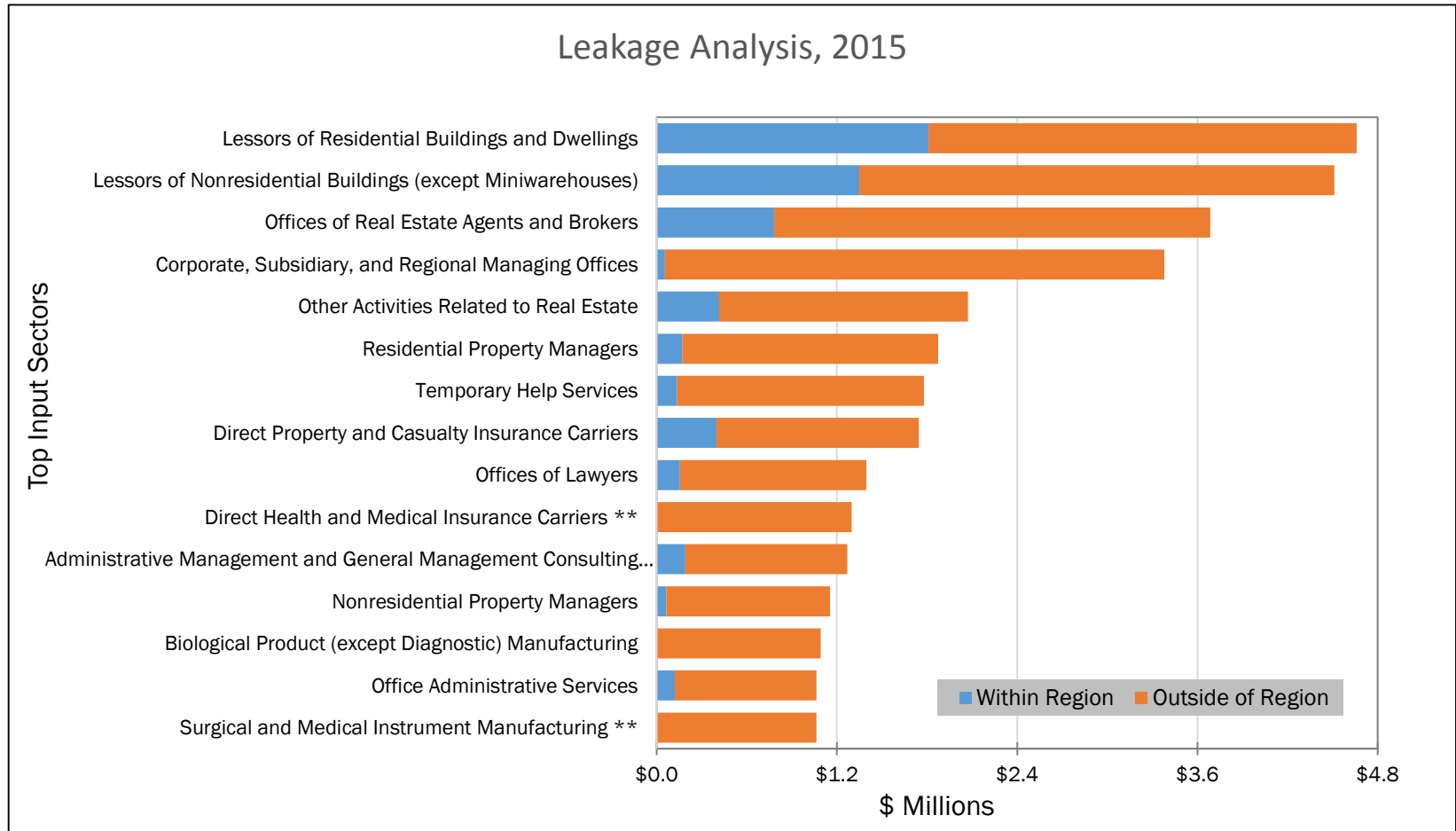
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Lessors of Residential Buildings and Dwellings	\$4.66	39%	61%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$4.51	30%	70%
Offices of Real Estate Agents and Brokers	\$3.69	21%	79%
Corporate, Subsidiary, and Regional Managing Offices	\$3.38	2%	98%
Other Activities Related to Real Estate	\$2.07	20%	80%
Residential Property Managers	\$1.87	9%	91%
Temporary Help Services	\$1.78	8%	92%
Direct Property and Casualty Insurance Carriers	\$1.75	23%	77%
Offices of Lawyers	\$1.40	11%	89%
Direct Health and Medical Insurance Carriers **	\$1.30	0%	100%
Administrative Management and General Management Consulting Services	\$1.27	15%	85%
Nonresidential Property Managers	\$1.15	5%	95%
Biological Product (except Diagnostic) Manufacturing	\$1.09	0%	100%
Office Administrative Services	\$1.06	11%	89%
Surgical and Medical Instrument Manufacturing **	\$1.06	0%	100%

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

section 02

Top 15 Inputs by Dollars

Biomedical/Biotechnical (Life Sciences)



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

section 02

Top Occupations

Biomedical/Biotechnical (Life Sciences)

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Nursing Assistants	512	6%	\$10.0	Postsecondary nondegree award
Licensed Practical and Licensed Vocational Nurses	227	12%	\$16.8	Postsecondary nondegree award
Registered Nurses	201	22%	\$25.9	Bachelor's degree
Personal Care Aides	166	36%	\$8.7	No formal educational credential
Home Health Aides	111	28%	\$9.8	No formal educational credential
Pharmacy Technicians	108	-11%	\$12.7	High school diploma or equivalent
Cooks, Institution and Cafeteria	98	10%	\$8.9	No formal educational credential
Psychiatric Aides	80	25%	\$12.6	High school diploma or equivalent
Mental Health Counselors	69	30%	\$16.0	Master's degree
Cashiers	68	-22%	\$8.8	No formal educational credential
Maids and Housekeeping Cleaners	62	7%	\$8.0	No formal educational credential
Food Servers, Nonrestaurant	57	2%	\$8.5	No formal educational credential
Mental Health and Substance Abuse Social Workers	52	27%	\$17.0	Bachelor's degree
Retail Salespersons	52	30%	\$10.0	No formal educational credential
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	52	27%	\$12.4	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Fabricated Metal Product Manufacturing


Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Machine Shops	79	8	9	17	-7	-24
All Other Miscellaneous Fabricated Metal Product Manufacturing	44	0	0	0	40	↑ 40
Metal Crown, Closure, and Other Metal Stamping (except Automotive)	42	2	1	3	14	↑ 11
Plate Work Manufacturing	34	2	0	2	9	↑ 7
Ornamental and Architectural Metal Work Manufacturing	15	0	0	0	12	↑ 12

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient number of jobs for Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers; Fabricated Structural Metal Manufacturing; and Sheet Metal Work Manufacturing.

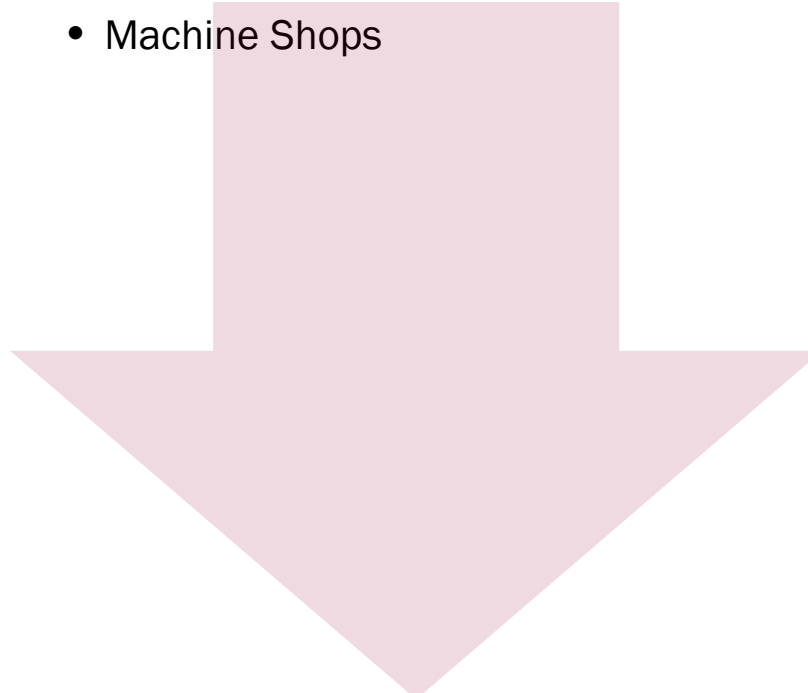
Shift-Share Analysis

Fabricated Metal Product Manufacturing

Industries that Outperformed

- 
- All Other Miscellaneous Fabricated Metal Product Manufacturing
 - Ornamental and Architectural Metal Work Manufacturing
 - Metal Crown, Closure, and Other Metal Stamping (except Automotive)
 - Plate Work Manufacturing

Industries that Underperformed

- 
- Machine Shops

Top Industry Sectors

Fabricated Metal Product Manufacturing

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Machine Shops	\$6.5	79	\$82,198	1.0
All Other Miscellaneous Fabricated Metal Product Manufacturing	\$5.6	44	\$128,294	2.1
Metal Crown, Closure, and Other Metal Stamping (except Automotive)	\$8.7	42	\$207,359	3.0
Plate Work Manufacturing	\$4.9	34	\$143,434	2.7
Ornamental and Architectural Metal Work Manufacturing	\$1.8	15	\$119,525	1.4

Note: Sorted similarly as the shift-share analysis slide. EMSI does not show sufficient number of jobs for Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers; Fabricated Structural Metal Manufacturing; and Sheet Metal Work Manufacturing.

Top 15 Inputs by Dollars

Fabricated Metal Product Manufacturing

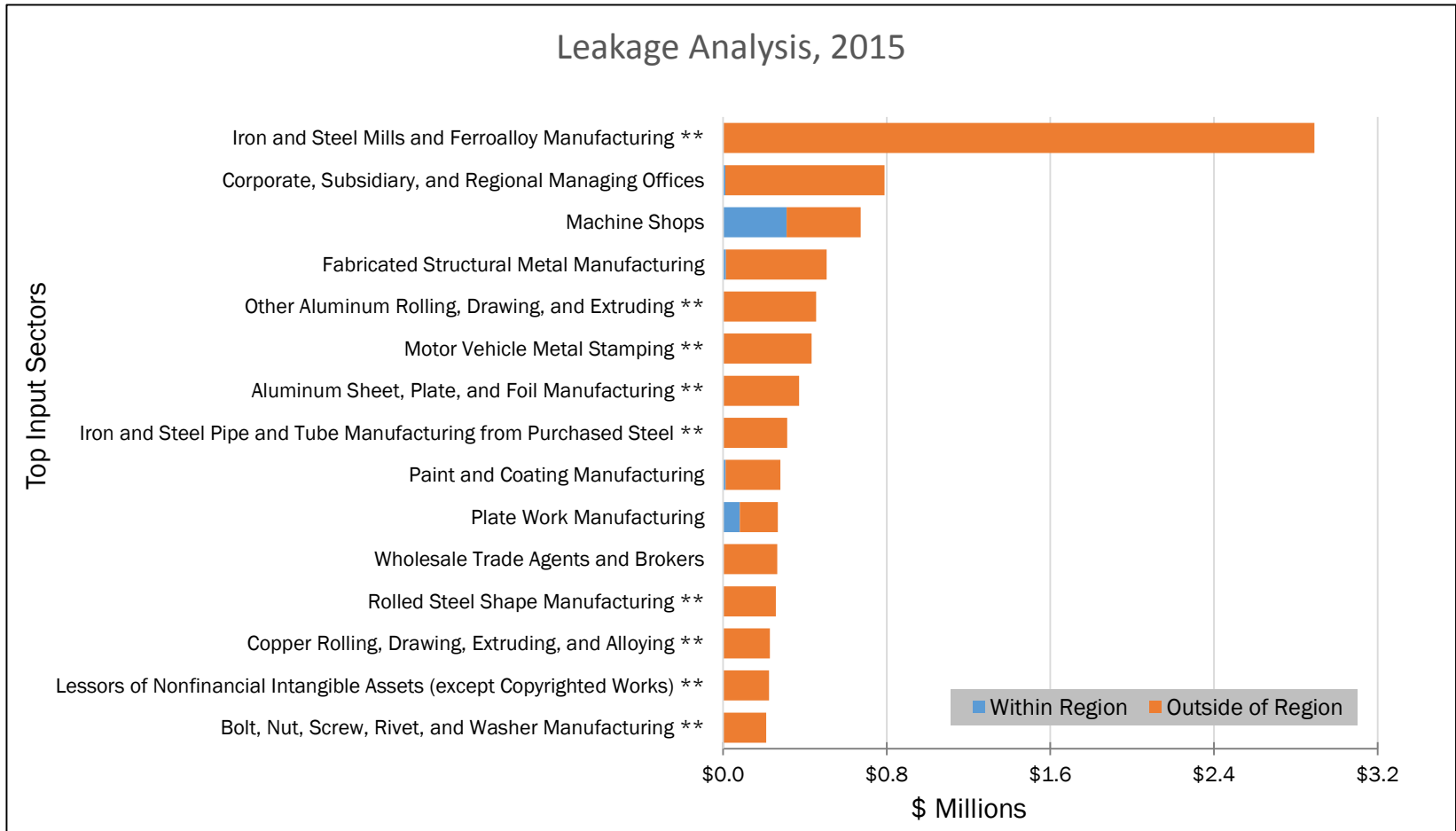
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Iron and Steel Mills and Ferroalloy Manufacturing **	\$2.89	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$0.79	1%	99%
Machine Shops	\$0.67	46%	54%
Fabricated Structural Metal Manufacturing *	\$0.51	3%	97%
Other Aluminum Rolling, Drawing, and Extruding **	\$0.45	0%	100%
Motor Vehicle Metal Stamping **	\$0.43	0%	100%
Aluminum Sheet, Plate, and Foil Manufacturing **	\$0.37	0%	100%
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel **	\$0.31	0%	100%
Paint and Coating Manufacturing *	\$0.28	5%	95%
Plate Work Manufacturing	\$0.27	30%	70%
Wholesale Trade Agents and Brokers	\$0.26	1%	99%
Rolled Steel Shape Manufacturing **	\$0.26	0%	100%
Copper Rolling, Drawing, Extruding, and Alloying **	\$0.23	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.23	0%	100%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing **	\$0.21	0%	100%

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

section 02

Top 15 Inputs by Dollars

Fabricated Metal Product Manufacturing



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

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Fabricated Metal Product Manufacturing

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Machinists	26	0%	\$18.6	High school diploma or equivalent
Managers, All Other	14	133%	\$15.7	Bachelor's degree
Welders, Cutters, Solderers, and Brazers	14	0%	\$16.7	High school diploma or equivalent
Team Assemblers	12	0%	\$13.8	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives. EMSI does not include detailed sectors for Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders; Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic; Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic; Tool and Die Makers; Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic; Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic; Forging Machine Setters, Operators, and Tenders, Metal and Plastic; Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic; Rolling Machine Setters, Operators, and Tenders, Metal and Plastic; Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic; and Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic.

section 02

Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Transportation and Logistics

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
General Freight Trucking, Long-Distance, Truckload	423	52	-21	31	-166	-197
General Freight Trucking, Local	157	17	-5	12	-40	-52
Couriers and Express Delivery Services	129	6	5	11	63	↑ 52
Rail transportation	128	9	5	14	29	↑ 15
Specialized Freight (except Used Goods) Trucking, Local	103	10	4	14	-6	-20
General Warehousing and Storage	91	7	21	28	16	-12
General Freight Trucking, Long-Distance, Less Than Truckload	77	4	6	10	37	↑ 27
Specialized Freight (except Used Goods) Trucking, Long-Distance	72	5	8	13	14	↑ 1
Motor Vehicle Towing	52	2	3	5	35	↑ 30
Other Warehousing and Storage	47	1	3	4	34	↑ 30
Freight Transportation Arrangement	32	7	11	18	-47	-65
Local Messengers and Local Delivery	30	2	3	5	3	-2
Process, Physical Distribution, and Logistics Consulting Services	20	0	0	0	15	↑ 15

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient number of jobs for Scheduled Passenger Air Transportation; and All Other Transit and Ground Passenger Transportation.

section 02

Shift-Share Analysis

Transportation and Logistics

Industries that Outperformed

- Couriers and Express Delivery Services
- Motor Vehicle Towing
- Other Warehousing and Storage
- General Freight Trucking, Long-Distance, Less Than Truckload
- Rail transportation
- Process, Physical Distribution, and Logistics Consulting Services
- Specialized Freight (except Used Goods) Trucking, Long-Distance

Industries that Underperformed

- Local Messengers and Local Delivery
- General Warehousing and Storage
- Specialized Freight (except Used Goods) Trucking, Local
- General Freight Trucking, Local
- Freight Transportation Arrangement
- General Freight Trucking, Long-Distance, Truckload

Top Industry Sectors

Transportation and Logistics

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
General Freight Trucking, Long-Distance, Truckload	\$39.8	423	\$94,135	2.0
General Freight Trucking, Local	\$8.7	157	\$55,406	1.3
Couriers and Express Delivery Services	\$8.1	129	\$62,612	0.7
Rail transportation	\$37.8	128	\$295,637	2.0
Specialized Freight (except Used Goods) Trucking, Local	\$4.7	103	\$45,820	1.6
General Warehousing and Storage	\$3.6	91	\$39,510	0.4
General Freight Trucking, Long-Distance, Less Than Truckload	\$10.8	77	\$141,118	1.0
Specialized Freight (except Used Goods) Trucking, Long-Distance	\$4.8	72	\$66,727	1.9
Motor Vehicle Towing	\$4.2	52	\$79,429	2.3
Other Warehousing and Storage	\$2.1	47	\$44,642	2.4
Freight Transportation Arrangement	\$2.5	32	\$76,378	0.5
Local Messengers and Local Delivery	\$0.1	30	\$2,946	0.7
Process, Physical Distribution, and Logistics Consulting Services	\$2.3	20	\$116,279	0.5

Note: Sorted similarly as the shift-share analysis slide. EMSI does not show sufficient number of jobs for Scheduled Passenger Air Transportation; and All Other Transit and Ground Passenger Transportation.

section 02

Top 15 Inputs by Dollars

Transportation and Logistics

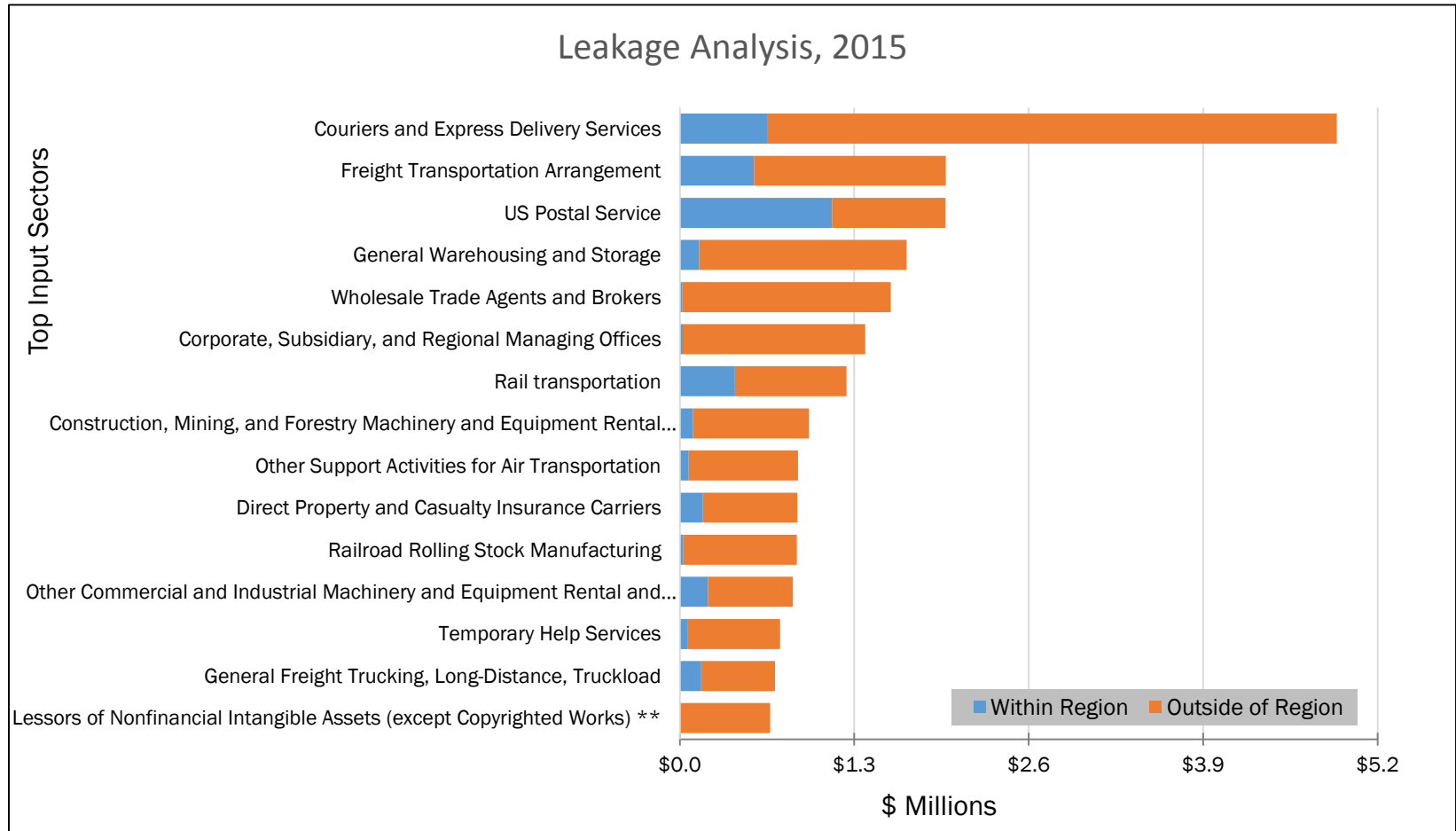
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Couriers and Express Delivery Services	\$4.90	13%	87%
Freight Transportation Arrangement	\$1.98	28%	72%
US Postal Service	\$1.98	57%	43%
General Warehousing and Storage	\$1.69	9%	91%
Wholesale Trade Agents and Brokers	\$1.57	1%	99%
Corporate, Subsidiary, and Regional Managing Offices	\$1.38	2%	98%
Rail transportation	\$1.24	33%	67%
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$0.96	10%	90%
Other Support Activities for Air Transportation *	\$0.88	8%	92%
Direct Property and Casualty Insurance Carriers	\$0.88	20%	80%
Railroad Rolling Stock Manufacturing *	\$0.87	3%	97%
Other Commercial and Industrial Machinery and Equipment Rental and Leasing	\$0.84	25%	75%
Temporary Help Services	\$0.75	7%	93%
General Freight Trucking, Long-Distance, Truckload	\$0.71	22%	78%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.67	0%	100%

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

section 02

Top 15 Inputs by Dollars

Transportation and Logistics



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

section 02

Top Occupations

Transportation and Logistics

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	673	-16%	\$15.0	Postsecondary nondegree award
Laborers and Freight, Stock, and Material Movers, Hand	105	31%	\$11.6	No formal educational credential
Light Truck or Delivery Services Drivers	83	24%	\$10.8	High school diploma or equivalent
Couriers and Messengers	53	20%	\$11.2	High school diploma or equivalent
Managers, All Other	53	13%	\$15.7	Bachelor's degree
Railroad Conductors and Yardmasters	23	28%	\$23.1	High school diploma or equivalent
Locomotive Engineers	22	29%	\$24.1	High school diploma or equivalent
Dispatchers, Except Police, Fire, and Ambulance	20	-9%	\$15.0	High school diploma or equivalent
Transportation, Storage, and Distribution Managers	19	36%	\$30.1	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	18	0%	\$12.4	High school diploma or equivalent
Sales Representatives, Services, All Other	15	-17%	\$17.2	High school diploma or equivalent
Office Clerks, General	14	8%	\$12.5	High school diploma or equivalent
Bus and Truck Mechanics and Diesel Engine Specialists	13	8%	\$14.7	High school diploma or equivalent
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	12	0%	\$19.6	High school diploma or equivalent
Railroad Brake, Signal, and Switch Operators	10	25%	\$23.0	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

03 Cluster Comparisons

**Agribusiness, Food Processing
and Technology**

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

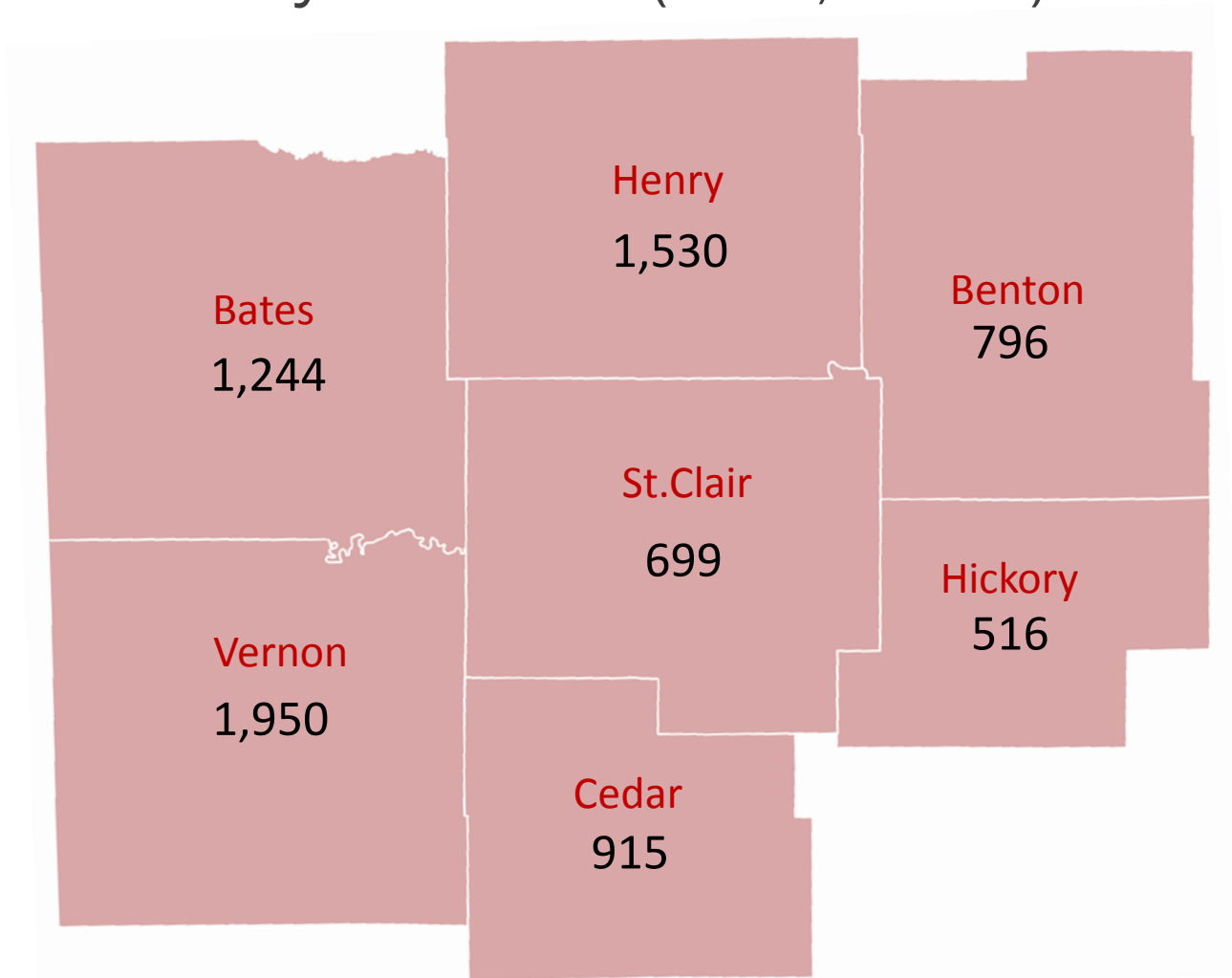
**Biomedical/Biotechnical
(Life Sciences)**

**Fabricated Metal Product
Manufacturing**

Transportation And Logistics

Agribusiness, Food Processing and Technology

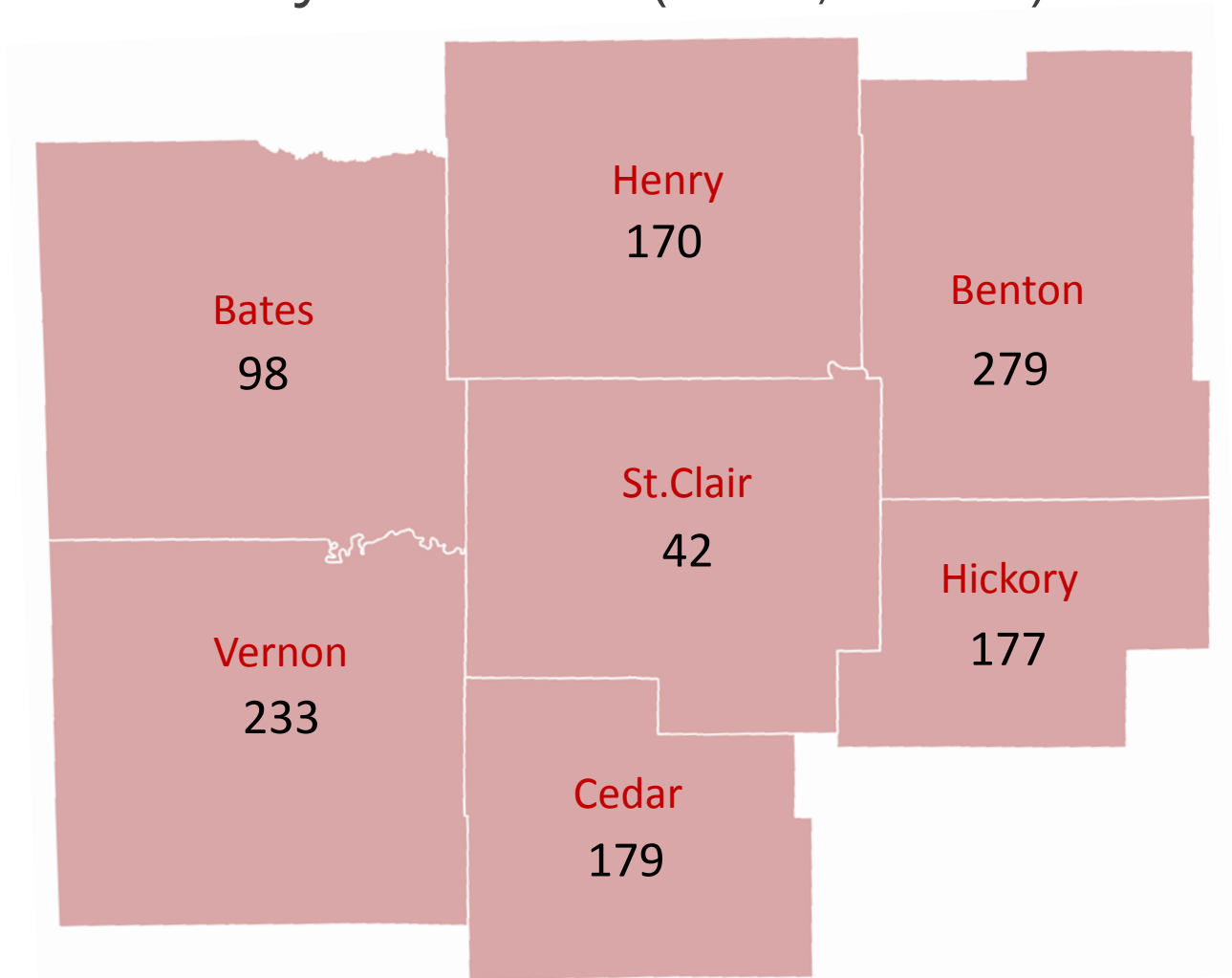
Contribution by Counties (Jobs, 2015)



section 03

Arts, Entertainment, Recreation And Visitor Industries

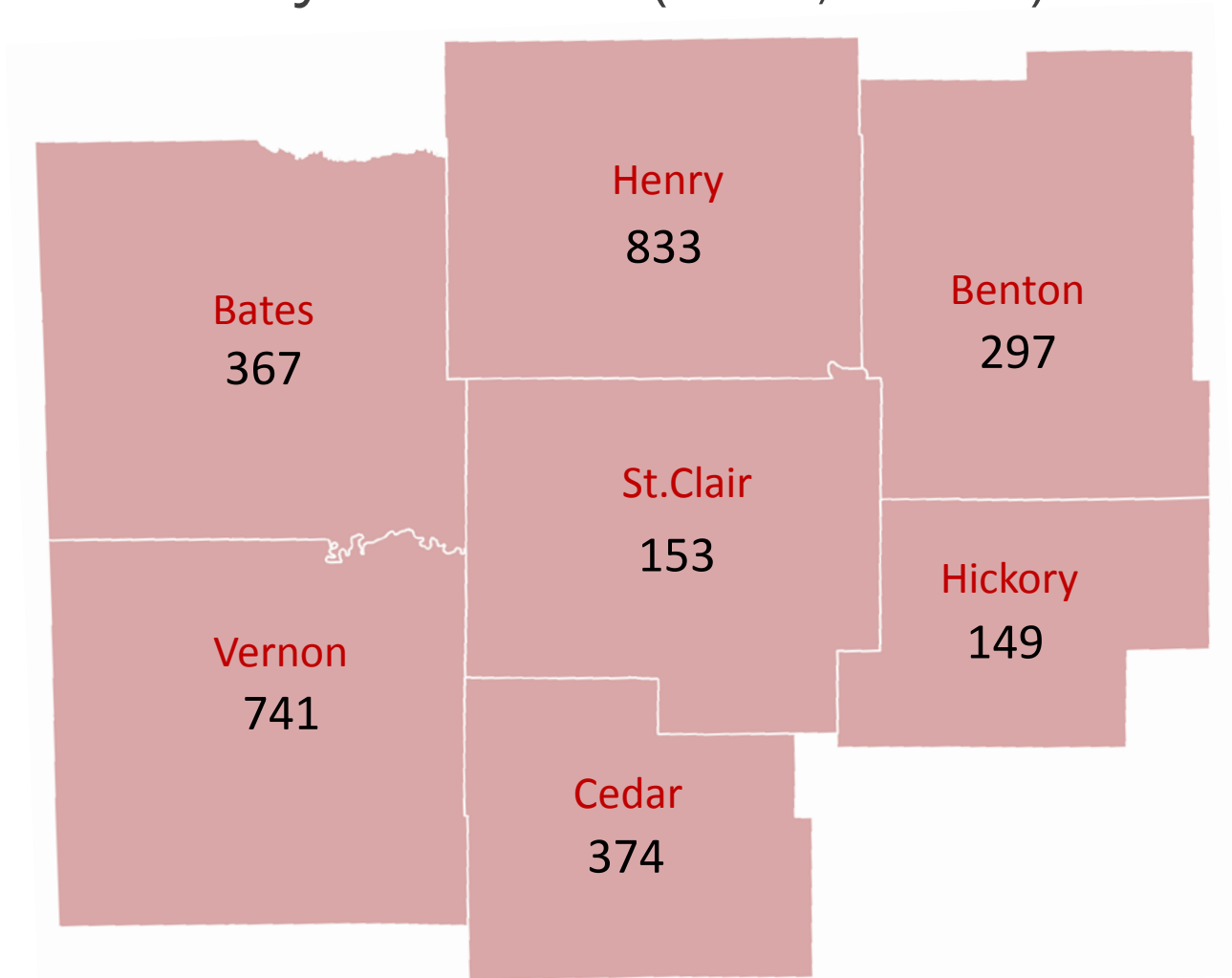
Contribution by Counties (Jobs, 2015)



section 03

Biomedical/Biotechnical (Life Sciences)

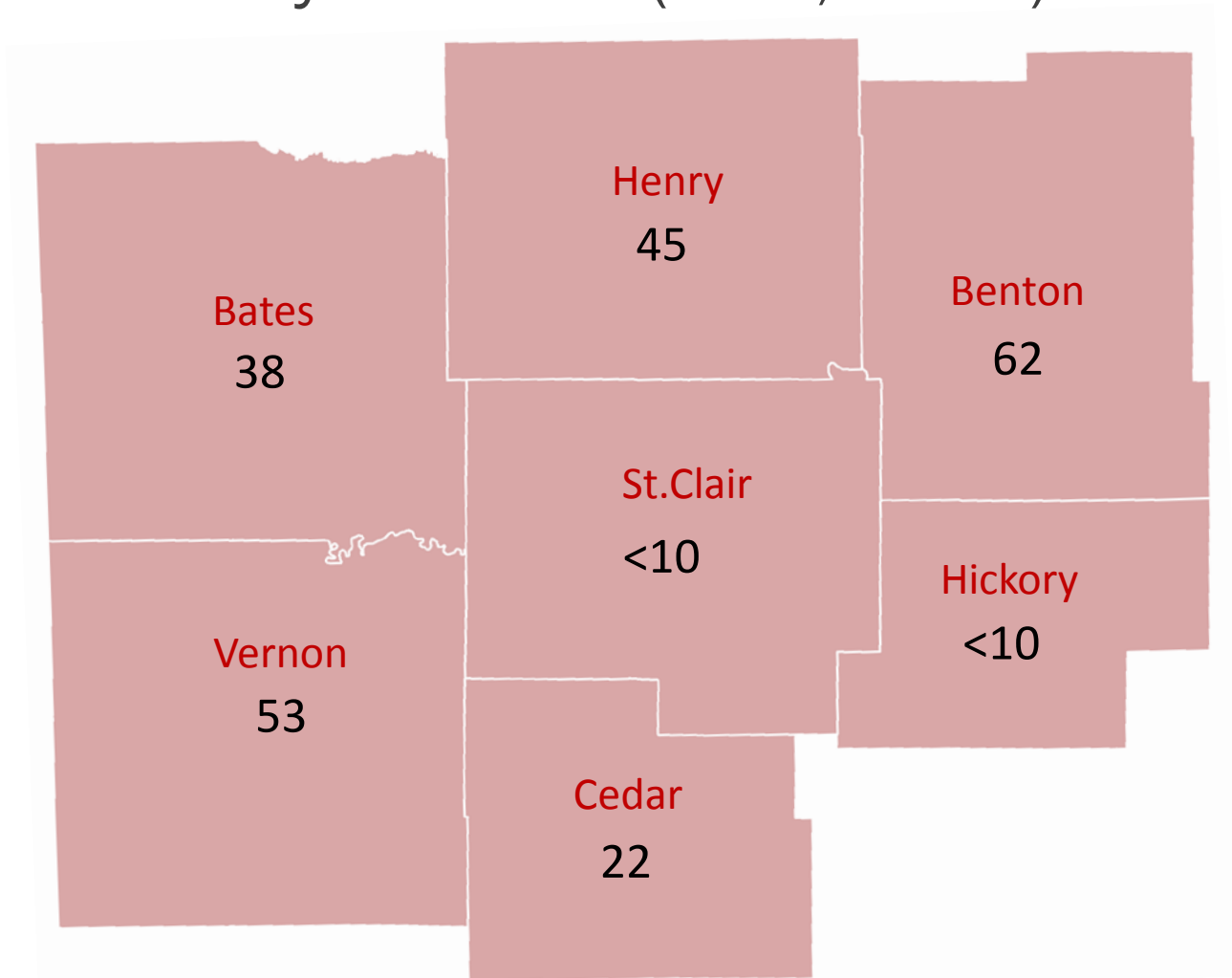
Contribution by Counties (Jobs, 2015)



section 03

Fabricated Metal Product Manufacturing

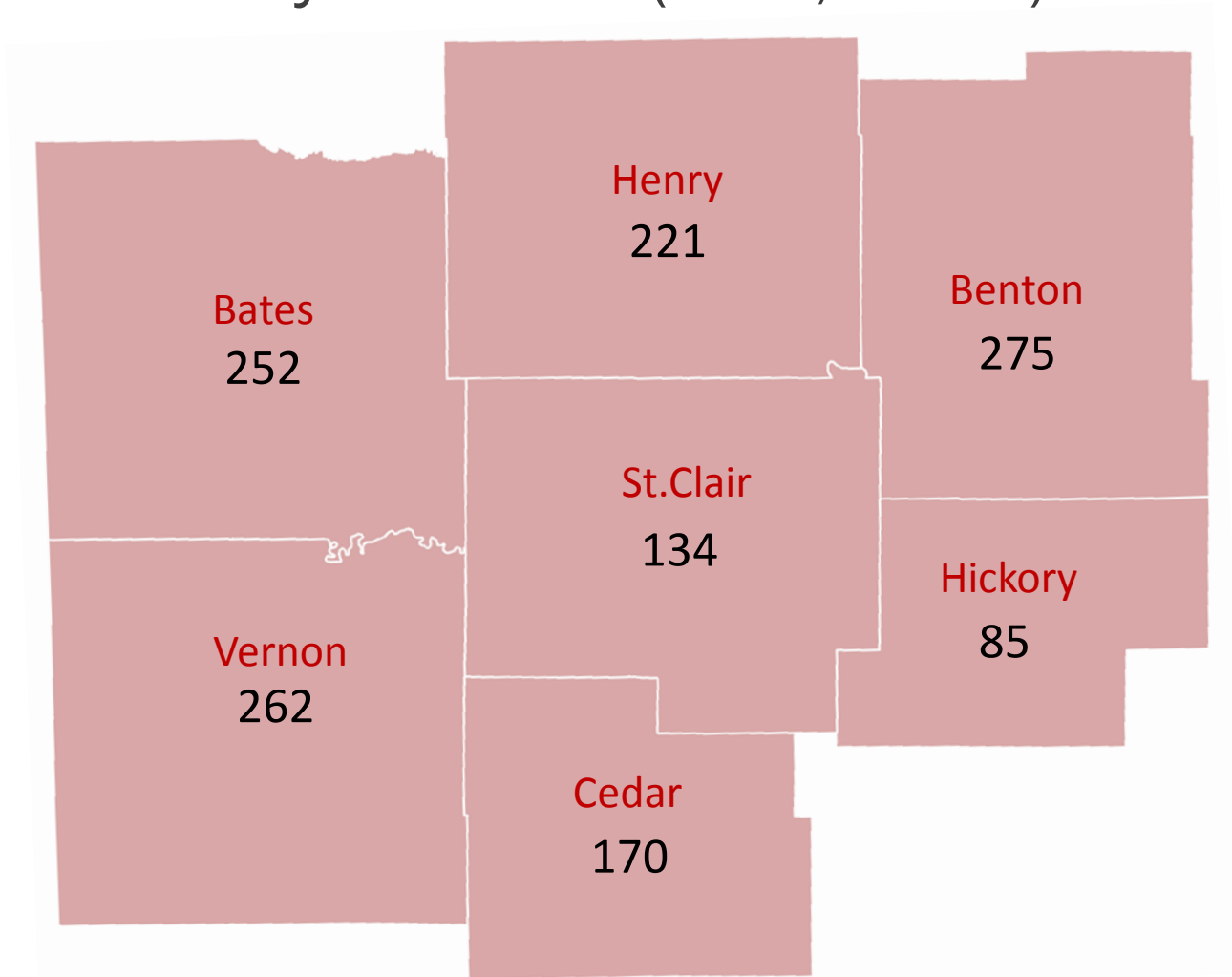
Contribution by Counties (Jobs, 2015)



section 03

Transportation And Logistics

Contribution by Counties (Jobs, 2015)



section 03

Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology	Arts, Entertainment, Recreation And Visitor Industries	Biomedical/Biotechnical (Life Sciences)
Regional Performance, 2009-2015 (Shift-share analysis)	-325 (negative value)	-16 (negative value)	+98 (positive value)
Export value, 2014	\$1,280,273,955	\$44,664,277	\$141,518,251
Leakage, 2014	\$796,890,021	\$24,310,255	\$68,218,265
Number of establishments, 2015	109	82	98
Contribution by counties	7	7	7

Business input	Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.
Resident's value	Review Civic Forum Input from Residents

section 03

Industry Clusters: Components to Assess

	Fabricated Metal Product Manufacturing	Transportation And Logistics	
Regional Performance, 2009-2015 (Shift-share analysis)	-15 (negative value)	-231 (negative value)	
Export value, 2014	\$30,219,822	\$131,558,880	
Leakage, 2014	\$16,203,958	\$74,459,299	
Number of establishments, 2015	14	102	
Contribution by counties	5	7	

Business input Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.

Resident's value Review Civic Forum Input from Residents

section 03