



# Regional Data Snapshot

*Target Industry Clusters*  
*SET Session 2*

**East Central NM Region, New Mexico**

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# 01 overview

East Central NM Region, NM

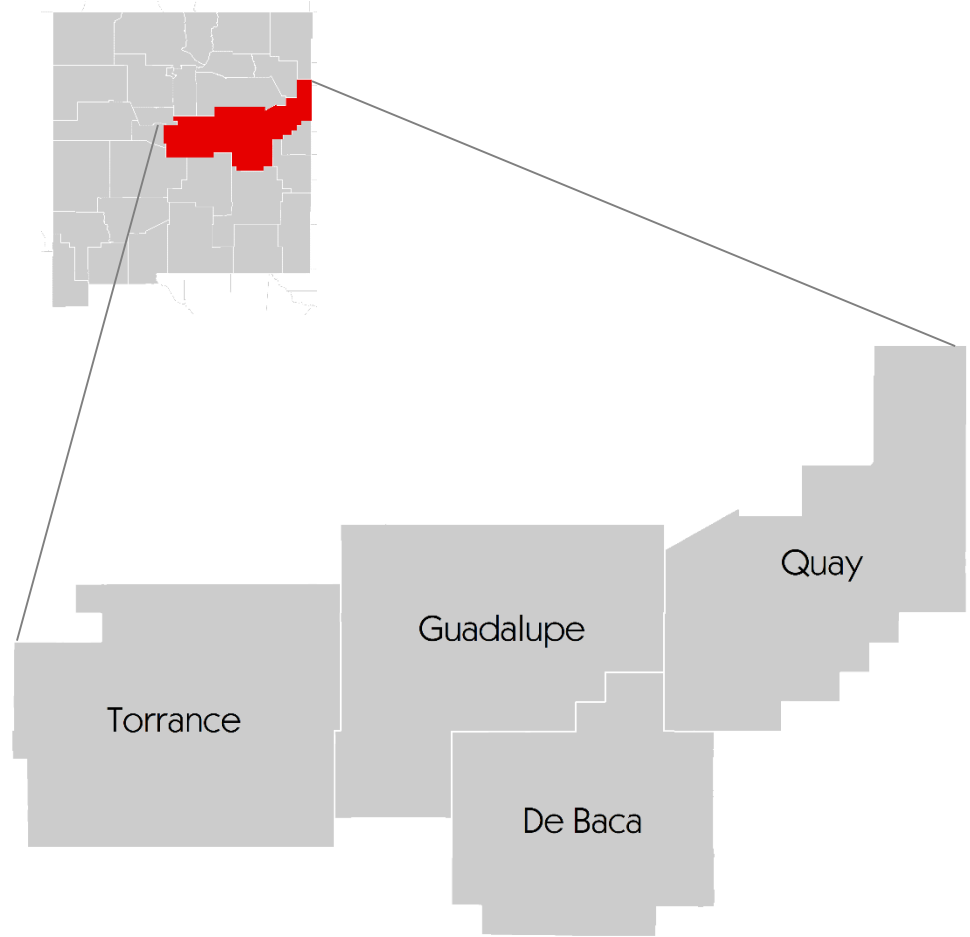
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## Overview

# East Central NM Region

The East Central NM Region is comprised of 4 New Mexico counties. Interstate Highway 40 connects the region to Albuquerque in the west and to Texas in the east.

- De Baca
- Guadalupe
- Quay
- Torrance



# 02 target industry clusters

**Agribusiness, Food Processing  
and Technology**

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**Arts, Entertainment,  
Recreation and Visitor  
Industries**

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**Biomedical/Biotechnical (Life  
Sciences)**

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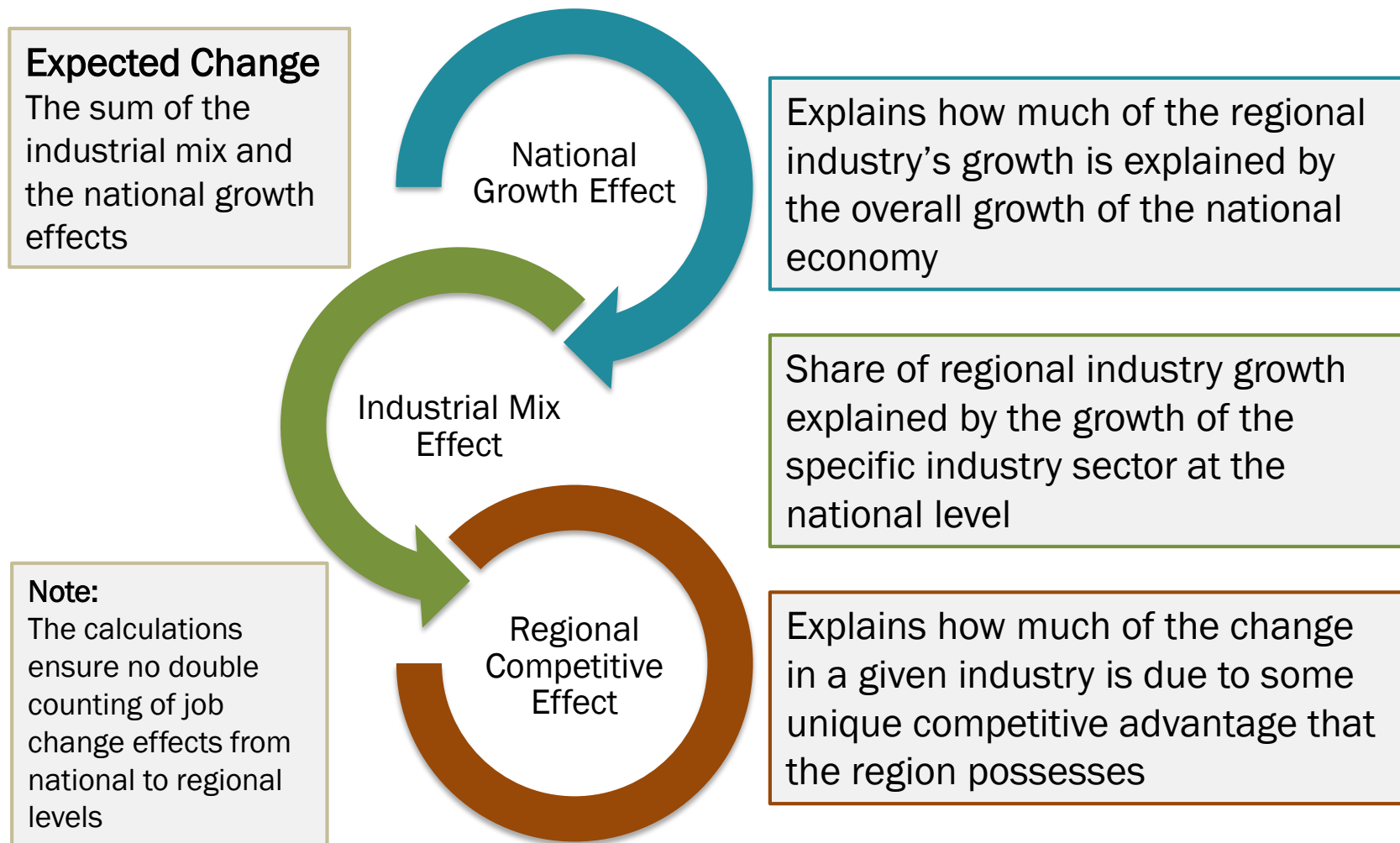
**Energy (Fossil and Renewable)**

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**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 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 and Aquaculture                    | 1,069     | 66                        | -85                       | -19                        | 77                           | ↑ 96                            |
| Crop Production                                      | 612       | 32                        | -24                       | 8                          | 125                          | ↑ 117                           |
| Farm Labor Contractors and Crew Leaders              | 35        | 1                         | 2                         | 3                          | 12                           | ↑ 9                             |
| Farm Supplies Merchant Wholesalers                   | 32        | 1                         | 0                         | 1                          | 17                           | ↑ 16                            |
| Cheese Manufacturing                                 | 26        | 1                         | 0                         | 1                          | 7                            | ↑ 6                             |
| Soil Preparation, Planting, and Cultivating          | 18        | 2                         | 0                         | 2                          | -5                           | -7                              |
| Tobacco Manufacturing                                | 17        | 1                         | -7                        | -6                         | -5                           | ↑ 1                             |
| Animal (except Poultry) Slaughtering                 | 16        | 1                         | -3                        | -2                         | -4                           | -2                              |
| Other Farm Product Raw Material Merchant Wholesalers | 14        | 0                         | 0                         | 0                          | 14                           | ↑ 14                            |
| Farm Management Services                             | 14        | 0                         | 0                         | 0                          | 11                           | ↑ 11                            |
| Retail Bakeries                                      | 11        | 0                         | 0                         | 0                          | 11                           | ↑ 11                            |

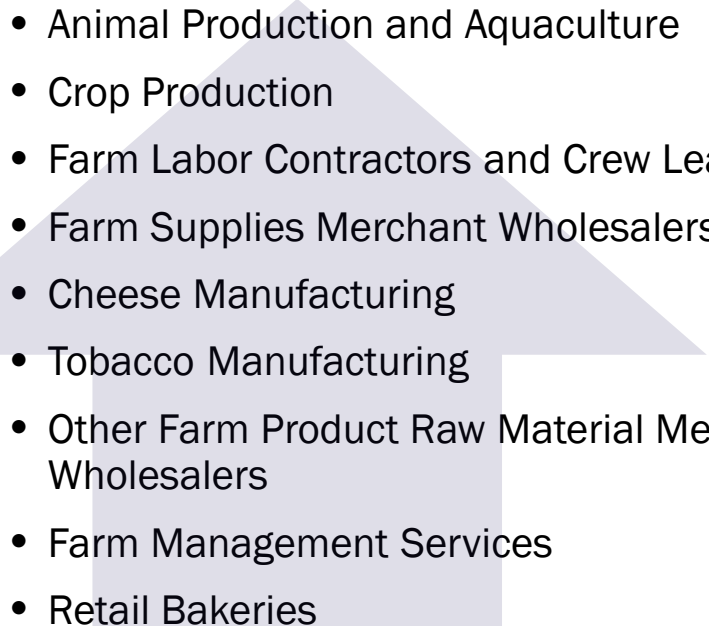
Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include complete jobs for Breweries; Tortilla Manufacturing; Wineries; and Spice and Extract Manufacturing

### section 02

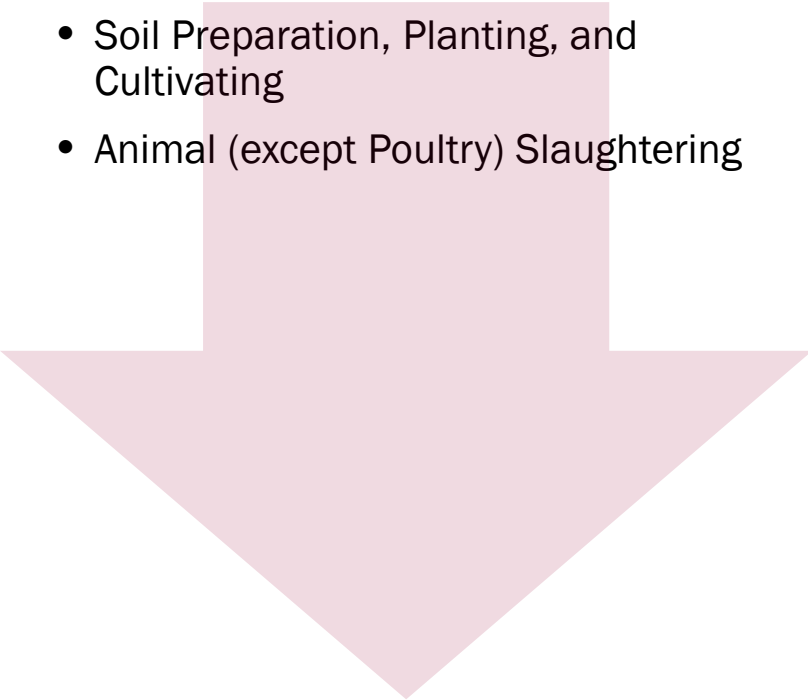
## Shift-Share Analysis

# Agribusiness, Food Processing and Technology

### Industries that Outperformed

- 
- Animal Production and Aquaculture
  - Crop Production
  - Farm Labor Contractors and Crew Leaders
  - Farm Supplies Merchant Wholesalers
  - Cheese Manufacturing
  - Tobacco Manufacturing
  - Other Farm Product Raw Material Merchant Wholesalers
  - Farm Management Services
  - Retail Bakeries

### Industries that Underperformed

- 
- Soil Preparation, Planting, and Cultivating
  - Animal (except Poultry) Slaughtering



## Top Industry Sectors

# Agribusiness, Food Processing and Technology

| Industries   | Exports 2014<br>(\$ Millions) | Jobs 2014 | Export per job<br>2014 (\$) | LQ 2014 |
|--|-------------------------------|-----------|-----------------------------|---------|
| Animal Production and Aquaculture                    | \$381.7                       | 1,069     | \$357,079                   | 13.0    |
| Crop Production                                      | \$68.7                        | 612       | \$112,172                   | 5.7     |
| Farm Labor Contractors and Crew Leaders              | \$0.3                         | 35        | \$9,518                     | 1.5     |
| Farm Supplies Merchant Wholesalers                   | \$3.7                         | 32        | \$118,589                   | 3.7     |
| Cheese Manufacturing                                 | \$17.1                        | 26        | \$669,587                   | 8.1     |
| Soil Preparation, Planting, and Cultivating          | \$0.1                         | 18        | \$3,154                     | 3.6     |
| Tobacco Manufacturing                                | \$15.1                        | 17        | \$887,017                   | 17.1    |
| Animal (except Poultry) Slaughtering                 | \$4.5                         | 16        | \$285,736                   | 1.6     |
| Other Farm Product Raw Material Merchant Wholesalers | \$1.0                         | 14        | \$69,095                    | 19.1    |
| Farm Management Services                             | \$0.0                         | 14        | \$3,268                     | 6.3     |
| Retail Bakeries                                      | \$0.4                         | 11        | \$32,370                    | 1.5     |

Note: Sorted similarly as the shift-share analysis slide. EMSI does not include complete jobs for Breweries; Tortilla Manufacturing; Wineries; and Spice and Extract Manufacturing

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## Top 15 Inputs by Dollars

# Agribusiness, Food Processing and Technology

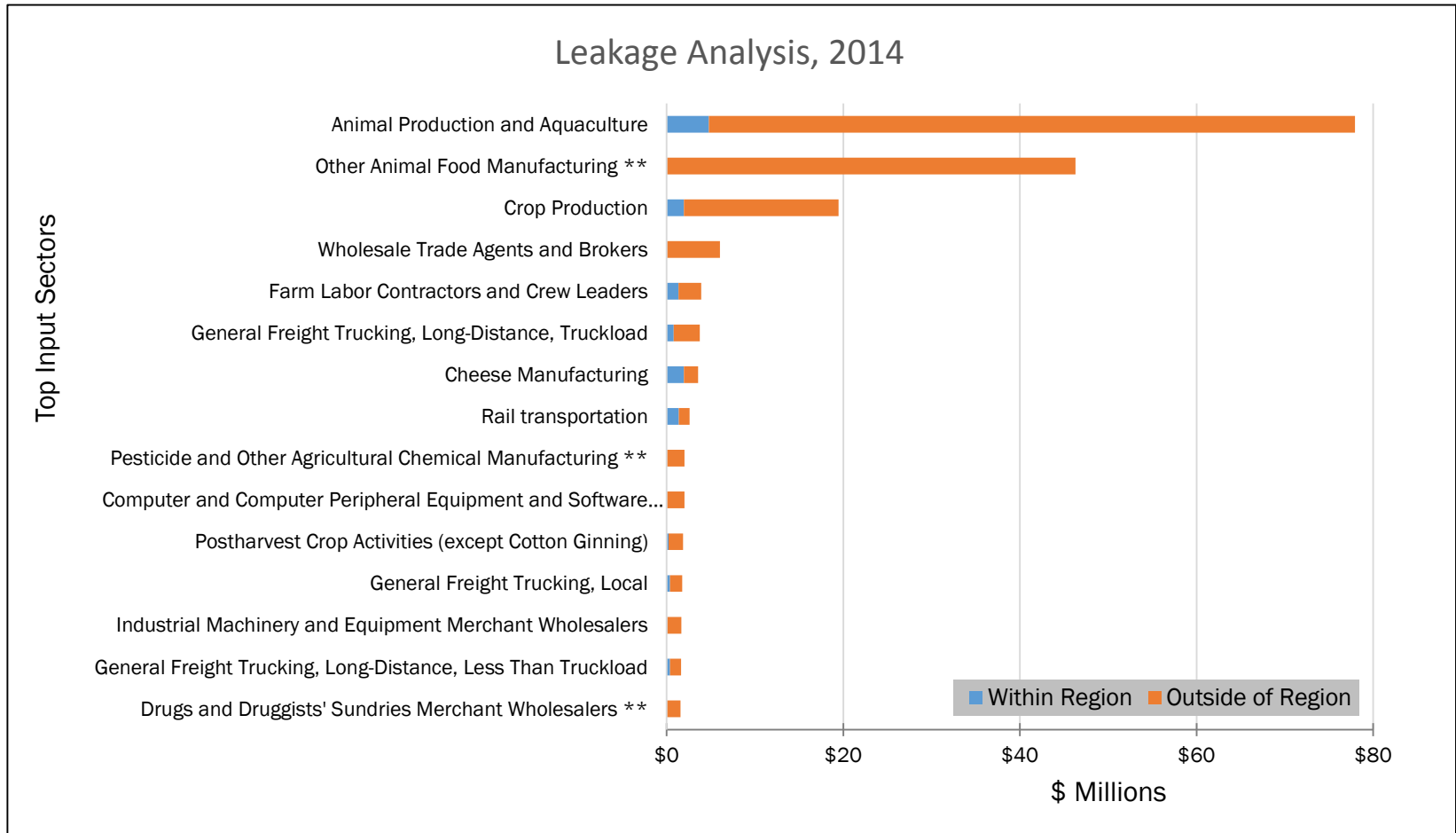
| Industries  | Estimated Input<br>(\$ Millions), 2014 | % In-Region | % Out of Region |
|---|--|-------------|-----------------|
| Animal Production and Aquaculture   | \$77.92                                | 6%          | 94%             |
| Other Animal Food Manufacturing **  | \$46.30                                | 0%          | 100%            |
| Crop Production   | \$19.47                                | 10%         | 90%             |
| Wholesale Trade Agents and Brokers *  | \$6.04                                 | 0%          | 100%            |
| Farm Labor Contractors and Crew Leaders   | \$3.92                                 | 34%         | 66%             |
| General Freight Trucking, Long-Distance, Truckload                              | \$3.74                                 | 21%         | 79%             |
| Cheese Manufacturing  | \$3.56                                 | 55%         | 45%             |
| Rail transportation   | \$2.60                                 | 53%         | 47%             |
| Pesticide and Other Agricultural Chemical Manufacturing **                      | \$2.01                                 | 0%          | 100%            |
| Computer and Computer Peripheral Equipment and Software Merchant Wholesalers ** | \$2.01                                 | 0%          | 100%            |
| Postharvest Crop Activities (except Cotton Ginning) *                           | \$1.85                                 | 12%         | 88%             |
| General Freight Trucking, Local   | \$1.75                                 | 22%         | 78%             |
| Industrial Machinery and Equipment Merchant Wholesalers *                       | \$1.67                                 | 3%          | 97%             |
| General Freight Trucking, Long-Distance, Less Than Truckload                    | \$1.62                                 | 24%         | 76%             |
| Drugs and Druggists' Sundries Merchant Wholesalers **                           | \$1.57                                 | 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

# Agribusiness, Food Processing and Technology



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

## section 02

## Top Occupations

# Agribusiness, Food Processing and Technology

| Occupations  | Jobs 2014 | % Change, 2009-2014 | Median Hr. Earnings | Entry Level Education             |
|--|-----------|---------------------|---------------------|-----------------------------------|
| Farmers, Ranchers, and Other Agricultural Managers   | 1,369     | 9%                  | \$13.0              | High school diploma or equivalent |
| Farmworkers and Laborers, Crop, Nursery, and Greenhouse                                      | 179       | 48%                 | \$9.5               | No formal educational credential  |
| Nonfarm Animal Caretakers  | 24        | 167%                | \$10.4              | High school diploma or equivalent |
| Animal Trainers  | 24        | 50%                 | \$11.2              | High school diploma or equivalent |
| Farmworkers, Farm, Ranch, and Aquacultural Animals   | 21        | 75%                 | \$13.8              | No formal educational credential  |
| Agricultural Equipment Operators   | 17        | 70%                 | \$12.9              | No formal educational credential  |
| Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products | 16        | 129%                | \$21.2              | High school diploma or equivalent |
| Managers, All Other  | 14        | 40%                 | \$17.2              | Bachelor's degree                 |
| Bookkeeping, Accounting, and Auditing Clerks   | 13        | 18%                 | \$15.0              | Some college, no degree           |
| Heavy and Tractor-Trailer Truck Drivers  | 12        | 71%                 | \$19.6              | Postsecondary nondegree award     |
| Laborers and Freight, Stock, and Material Movers, Hand                                       | 11        | 57%                 | \$12.6              | No formal educational credential  |

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives. EMSI does not include complete jobs for File Clerks; Food Preparation Workers; Veterinary Assistants and Laboratory Animal Caretakers; and Data Entry Keyers.

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

# Arts, Entertainment, Recreation and Visitor Industries

| 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        | 515       | 30                        | 9                         | 39                         | 66                           | ↑ 27                            |
| Independent Artists, Writers, and Performers    | 73        | 5                         | 1                         | 6                          | 4                            | -2                              |
| All Other Amusement and Recreation Industries   | 46        | 1                         | 3                         | 4                          | 27                           | ↑ 23                            |
| RV (Recreational Vehicle) Parks and Campgrounds | 34        | 1                         | 1                         | 2                          | 17                           | ↑ 15                            |
| Fitness and Recreational Sports Centers         | 31        | 0                         | 0                         | 0                          | 25                           | ↑ 25                            |
| Other Spectator Sports                          | 29        | 2                         | -1                        | 1                          | 0                            | -1                              |
| Bed-and-Breakfast Inns                          | 23        | 2                         | 0                         | 2                          | -1                           | -3                              |
| Racetracks                                      | 13        | 1                         | -3                        | -2                         | -3                           | -1                              |

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include complete jobs for Theater Companies and Dinner Theaters; Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures; Promoters of Performing Arts, Sports, and Similar Events with Facilities; Museums; Promoters of Performing Arts, Sports, and Similar Events without Facilities; Skiing Facilities; and All Other Traveler Accommodation.

### section 02

## Shift-Share Analysis

# Arts, Entertainment, Recreation and Visitor Industries

### Industries that Outperformed

- Hotels (except Casino Hotels) and Motels
- All Other Amusement and Recreation Industries
- RV (Recreational Vehicle) Parks and Campgrounds
- Fitness and Recreational Sports Centers

### Industries that Underperformed

- Independent Artists, Writers, and Performers
- Other Spectator Sports
- Bed-and-Breakfast Inns
- Racetracks

## Top Industry Sectors

# Arts, Entertainment, Recreation and Visitor Industries

| Industries                                      | Exports 2014<br>(\$ Millions) | Jobs 2014 | Export per job<br>2014 (\$) | LQ 2014 |
|---|-------------------------------|-----------|-----------------------------|---------|
| Hotels (except Casino Hotels) and Motels        | \$28.8                        | 515       | \$55,923                    | 4.5     |
| Independent Artists, Writers, and Performers    | \$0.5                         | 73        | \$7,393                     | 0.9     |
| All Other Amusement and Recreation Industries   | \$0.3                         | 46        | \$6,544                     | 2.3     |
| RV (Recreational Vehicle) Parks and Campgrounds | \$4.7                         | 34        | \$137,881                   | 11.7    |
| Fitness and Recreational Sports Centers         | \$0.1                         | 31        | \$4,001                     | 0.6     |
| Other Spectator Sports                          | \$1.4                         | 29        | \$46,854                    | 2.3     |
| Bed-and-Breakfast Inns                          | \$3.8                         | 23        | \$166,171                   | 11.8    |
| Racetracks                                      | \$0.5                         | 13        | \$41,253                    | 2.7     |

Note: Sorted similarly as the shift-share analysis slide. EMSI does not include complete jobs for Theater Companies and Dinner Theaters; Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures; Promoters of Performing Arts, Sports, and Similar Events with Facilities; Museums Promoters of Performing Arts, Sports, and Similar Events without Facilities; Skiing Facilities; and All Other Traveler Accommodation.

### section 02

## Top 15 Inputs by Dollars

# Arts, Entertainment, Recreation and Visitor Industries

| Industries  | Estimated Input<br>(\$ Millions), 2014 | % In-Region | % Out of Region |
|---|--|-------------|-----------------|
| Corporate, Subsidiary, and Regional Managing Offices *                  | \$2.57                                 | 1%          | 99%             |
| Offices of Lawyers  | \$0.50                                 | 12%         | 88%             |
| Lessors of Residential Buildings and Dwellings                          | \$0.41                                 | 18%         | 82%             |
| Lessors of Nonresidential Buildings (except Miniwarehouses)             | \$0.40                                 | 19%         | 81%             |
| Offices of Real Estate Agents and Brokers                               | \$0.32                                 | 9%          | 91%             |
| Advertising Agencies *  | \$0.32                                 | 1%          | 99%             |
| Cheese Manufacturing  | \$0.32                                 | 24%         | 76%             |
| Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) ** | \$0.29                                 | 0%          | 100%            |
| Janitorial Services   | \$0.29                                 | 23%         | 77%             |
| Landscaping Services  | \$0.25                                 | 17%         | 83%             |
| Administrative Management and General Management Consulting Services    | \$0.23                                 | 5%          | 95%             |
| Poultry Processing **   | \$0.22                                 | 0%          | 100%            |
| US Postal Service   | \$0.20                                 | 52%         | 48%             |
| Temporary Help Services *   | \$0.19                                 | 3%          | 97%             |
| Wineries *  | \$0.19                                 | 0%          | 100%            |

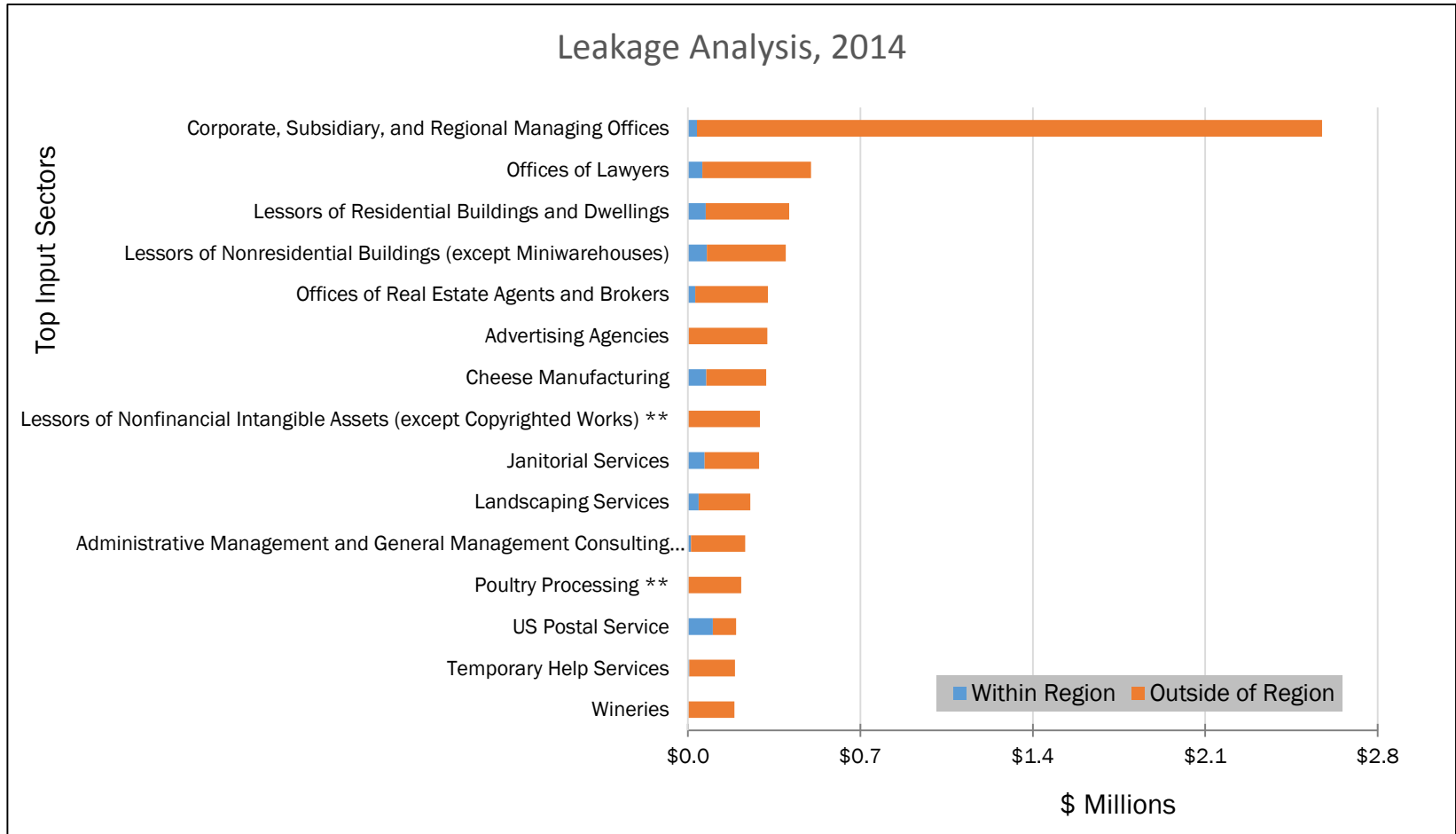
Note: \* industry sector has less than 10 jobs as calculated by EMSI; \*\* industry sector is not present in the region.

### section 02



## Top 15 Inputs by Dollars

# 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 2014 | % Change, 2009-2014 | Median Hrly Earnings | Entry Level Education             |
|---|-----------|---------------------|----------------------|-----------------------------------|
| Maids and Housekeeping Cleaners                               | 157       | 13%                 | \$8.4                | No formal educational credential  |
| Hotel, Motel, and Resort Desk Clerks                          | 112       | 13%                 | \$8.7                | High school diploma or equivalent |
| Lodging Managers  | 61        | 39%                 | \$18.5               | High school diploma or equivalent |
| Musicians and Singers   | 27        | 8%                  | \$15.1               | No formal educational credential  |
| Waiters and Waitresses  | 24        | 4%                  | \$8.4                | No formal educational credential  |
| Maintenance and Repair Workers, General                       | 23        | 10%                 | \$14.1               | High school diploma or equivalent |
| Writers and Authors   | 23        | 5%                  | \$16.2               | Bachelor's degree                 |
| Fitness Trainers and Aerobics Instructors                     | 22        | 267%                | \$13.0               | High school diploma or equivalent |
| Fine Artists, Including Painters, Sculptors, and Illustrators | 14        | -7%                 | \$7.9                | Bachelor's degree                 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 13        | 30%                 | \$9.5                | No formal educational credential  |
| Food Servers, Nonrestaurant                                   | 12        | 0%                  | \$8.4                | No formal educational credential  |
| Tour Guides and Escorts                                       | 12        | 200%                | \$20.0               | High school diploma or equivalent |
| Cooks, Restaurant   | 12        | 20%                 | \$9.1                | No formal educational credential  |
| Coaches and Scouts  | 11        | 120%                | \$11.9               | Bachelor's degree                 |
| Managers, All Other   | 10        | 150%                | \$17.2               | Bachelor's degree                 |

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

### section 02

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

# Biomedical/Biotechnical (Life Sciences)

| 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               | 173       | 9                         | -6                        | 3                          | 31                           | ↑ 28                            |
| Home Health Care Services                            | 90        | 4                         | 11                        | 15                         | 32                           | ↑ 17                            |
| Pharmacies and Drug Stores                           | 57        | 4                         | -5                        | -1                         | -2                           | -1                              |
| All Other Outpatient Care Centers                    | 52        | 1                         | 5                         | 6                          | 34                           | ↑ 28                            |
| Nursing Care Facilities (Skilled Nursing Facilities) | 25        | 0                         | 0                         | 0                          | 23                           | ↑ 23                            |
| Assisted Living Facilities for the Elderly           | 24        | 4                         | 6                         | 10                         | -34                          | -44                             |
| Outpatient Mental Health and Substance Abuse Centers | 17        | 0                         | 1                         | 1                          | 11                           | ↑ 10                            |
| Continuing Care Retirement Communities               | 10        | 0                         | 1                         | 1                          | 3                            | ↑ 2                             |

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include complete jobs for Food (Health) Supplement Stores; Research and Development in Biotechnology; All Other Health and Personal Care Stores; Medical Laboratories; Residential Intellectual and Developmental Disability Facilities; All Other Miscellaneous Ambulatory Health Care Services; and Cosmetics, Beauty Supplies, and Perfume Stores.

### section 02

## Shift-Share Analysis

# Biomedical/Biotechnical (Life Sciences)

### Industries that Outperformed

- General Medical and Surgical Hospitals
- Home Health Care Services
- All Other Outpatient Care Centers
- Nursing Care Facilities (Skilled Nursing Facilities)
- Outpatient Mental Health and Substance Abuse Centers
- Continuing Care Retirement Communities

### Industries that Underperformed

- Pharmacies and Drug Stores
- Assisted Living Facilities for the Elderly

## Top Industry Sectors

# Biomedical/Biotechnical (Life Sciences)

| Industries   | Exports 2014<br>(\$ Millions) | Jobs 2014 | Export per job<br>2014 (\$) | LQ 2014 |
|--|-------------------------------|-----------|-----------------------------|---------|
| General Medical and Surgical Hospitals               | \$11.8                        | 173       | \$68,414                    | 0.5     |
| Home Health Care Services                            | \$1.6                         | 90        | \$17,365                    | 0.7     |
| Pharmacies and Drug Stores                           | \$3.7                         | 57        | \$64,596                    | 1.1     |
| All Other Outpatient Care Centers                    | \$5.2                         | 52        | \$100,474                   | 5.1     |
| Nursing Care Facilities (Skilled Nursing Facilities) | \$0.9                         | 25        | \$35,569                    | 0.2     |
| Assisted Living Facilities for the Elderly           | \$0.5                         | 24        | \$21,345                    | 0.8     |
| Outpatient Mental Health and Substance Abuse Centers | \$1.1                         | 17        | \$64,918                    | 1.1     |
| Continuing Care Retirement Communities               | \$0.1                         | 10        | \$8,169                     | 0.3     |

Note: Sorted similarly as the shift-share analysis slide. EMSI does not include complete jobs for Food (Health) Supplement Stores; Research and Development in Biotechnology; All Other Health and Personal Care Stores; Medical Laboratories; Residential Intellectual and Developmental Disability Facilities; All Other Miscellaneous Ambulatory Health Care Services; and Cosmetics, Beauty Supplies, and Perfume Stores.

### section 02

## Top 15 Inputs by Dollars

# Biomedical/Biotechnical (Life Sciences)

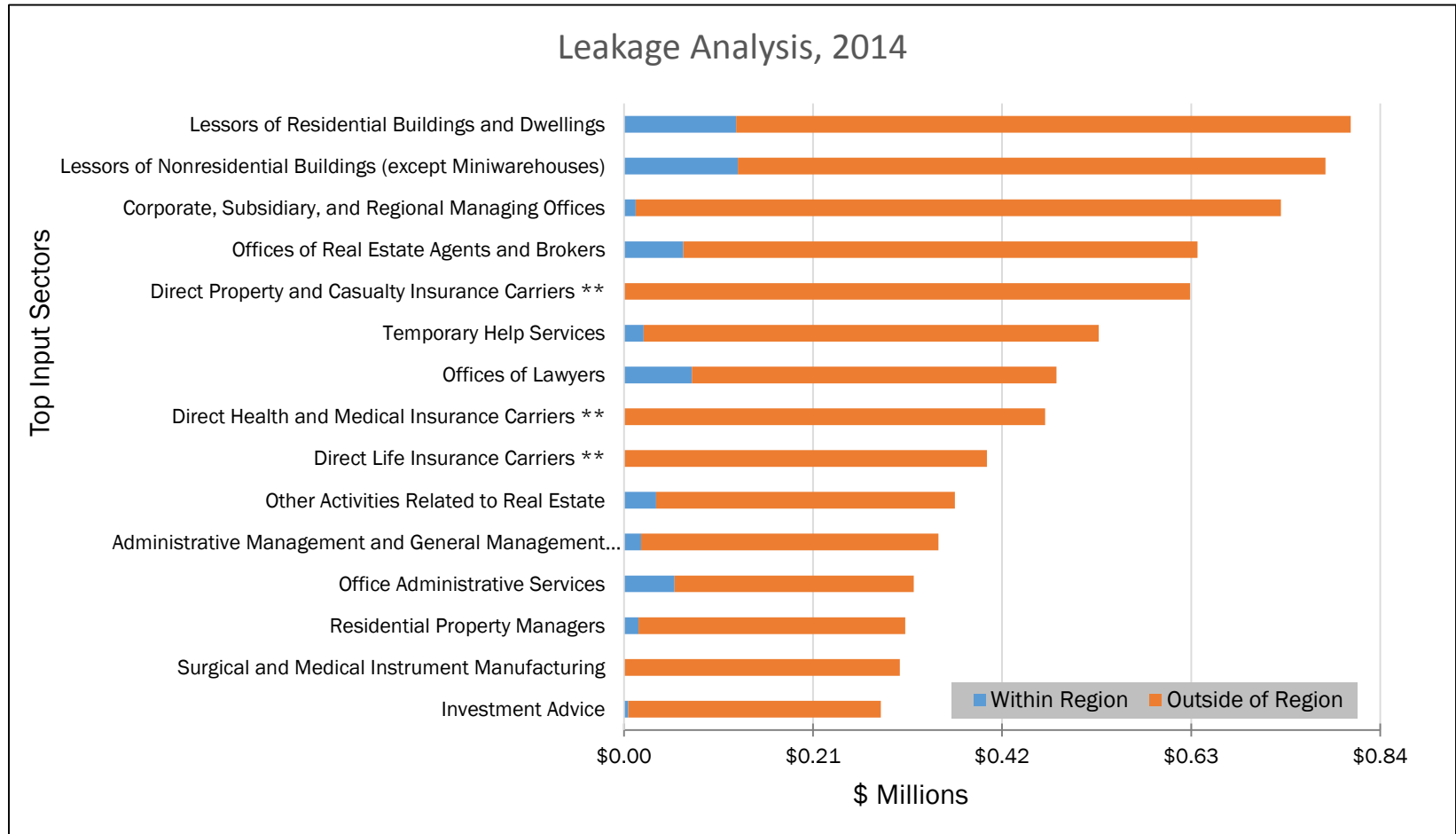
| Industries   | Estimated Input<br>(\$ Millions), 2014 | % In-Region | % Out of Region |
|--|--|-------------|-----------------|
| Lessors of Residential Buildings and Dwellings                       | \$0.81                                 | 15%         | 85%             |
| Lessors of Nonresidential Buildings (except Miniwarehouses)          | \$0.78                                 | 16%         | 84%             |
| Corporate, Subsidiary, and Regional Managing Offices *               | \$0.73                                 | 2%          | 98%             |
| Offices of Real Estate Agents and Brokers                            | \$0.64                                 | 10%         | 90%             |
| Direct Property and Casualty Insurance Carriers **                   | \$0.63                                 | 0%          | 100%            |
| Temporary Help Services *  | \$0.53                                 | 4%          | 96%             |
| Offices of Lawyers   | \$0.48                                 | 16%         | 84%             |
| Direct Health and Medical Insurance Carriers **                      | \$0.47                                 | 0%          | 100%            |
| Direct Life Insurance Carriers **                                    | \$0.40                                 | 0%          | 100%            |
| Other Activities Related to Real Estate                              | \$0.37                                 | 10%         | 90%             |
| Administrative Management and General Management Consulting Services | \$0.35                                 | 5%          | 95%             |
| Office Administrative Services                                       | \$0.32                                 | 17%         | 83%             |
| Residential Property Managers *                                      | \$0.31                                 | 5%          | 95%             |
| Surgical and Medical Instrument Manufacturing *                      | \$0.31                                 | 0%          | 100%            |
| Investment Advice  | \$0.29                                 | 2%          | 98%             |

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

# Biomedical/Biotechnical (Life Sciences)



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

### section 02

## Top Occupations

# Biomedical/Biotechnical (Life Sciences)

| Occupations                                       | Jobs 2014 | % Change, 2009-2014 | Median Hr. Earnings | Entry Level Education             |
|---|-----------|---------------------|---------------------|-----------------------------------|
| Registered Nurses                                 | 66        | 47%                 | \$27.6              | Bachelor's degree                 |
| Personal Care Aides                               | 41        | -2%                 | \$8.7               | No formal educational credential  |
| Home Health Aides                                 | 41        | 17%                 | \$9.9               | No formal educational credential  |
| Nursing Assistants                                | 25        | 25%                 | \$10.4              | Postsecondary nondegree award     |
| Pharmacy Technicians                              | 19        | 0%                  | \$13.1              | High school diploma or equivalent |
| Cashiers  | 13        | -7%                 | \$8.8               | No formal educational credential  |
| Licensed Practical and Licensed Vocational Nurses | 11        | 57%                 | \$19.9              | Postsecondary nondegree award     |
| Medical Assistants                                | 11        | 83%                 | \$12.2              | Postsecondary nondegree award     |
| Pharmacists                                       | 11        | 10%                 | \$54.0              | Doctoral or professional degree   |

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives. EMSI does not include complete jobs for First-Line Supervisors of Food Preparation and Serving Workers; Diagnostic Medical Sonographers; First-Line Supervisors of Production and Operating Workers; Cardiovascular Technologists and Technicians; Cooks, Institution and Cafeteria; and Magnetic Resonance Imaging Technologists.

### section 02



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

# Energy (Fossil And Renewable)

| 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                             |
| Other Gasoline Stations  | 307       | 16                        | -15                       | 1                          | 58                           | ↑ 57                            |
| Gasoline Stations with Convenience Stores                        | 256       | 21                        | -1                        | 20                         | -63                          | -83                             |
| Petroleum Bulk Stations and Terminals                            | 96        | 0                         | 0                         | 0                          | 91                           | ↑ 91                            |
| Electric Power Distribution                                      | 78        | 6                         | 35                        | 41                         | -16                          | -57                             |
| Plumbing, Heating, and Air-Conditioning Contractors              | 73        | 5                         | 0                         | 5                          | -6                           | -11                             |
| Electrical Contractors and Other Wiring Installation Contractors | 60        | 4                         | -3                        | 1                          | 2                            | ↑ 1                             |
| Natural Gas Distribution   | 45        | 3                         | -2                        | 1                          | -8                           | -9                              |
| Crude Petroleum and Natural Gas Extraction                       | 36        | 1                         | 9                         | 10                         | 18                           | ↑ 8                             |
| Power and Communication Line and Related Structures Construction | 26        | 2                         | 6                         | 8                          | -12                          | -20                             |
| Miscellaneous Intermediation                                     | 22        | 1                         | 0                         | 1                          | 1                            | 0                               |
| Other Heavy and Civil Engineering Construction                   | 20        | 1                         | -1                        | 0                          | 6                            | ↑ 6                             |
| Fuel Dealers   | 18        | 1                         | -3                        | -2                         | 0                            | ↑ 2                             |
| Water and Sewer Line and Related Structures Construction         | 17        | 1                         | -1                        | 0                          | 2                            | ↑ 2                             |
| Electric Bulk Power Transmission and Control                     | 16        | 0                         | 0                         | 0                          | 14                           | ↑ 14                            |
| Engineering Services   | 14        | 2                         | -1                        | 1                          | -13                          | -14                             |

Note: Upward arrow (↑) indicates regional competitiveness.

### section 02

## Shift-Share Analysis

# Energy (Fossil And Renewable)

### Industries that Outperformed

- Other Gasoline Stations
- Petroleum Bulk Stations and Terminals
- Electrical Contractors and Other Wiring Installation Contractors
- Crude Petroleum and Natural Gas Extraction
- Other Heavy and Civil Engineering Construction
- Fuel Dealers
- Water and Sewer Line and Related Structures Construction
- Electric Bulk Power Transmission and Control

### Industries that Underperformed

- Gasoline Stations with Convenience Stores
- Electric Power Distribution
- Plumbing, Heating, and Air-Conditioning Contractors
- Natural Gas Distribution
- Power and Communication Line and Related Structures Construction
- Miscellaneous Intermediation
- Engineering Services

## Top Industry Sectors

# Energy (Fossil And Renewable)

| Industries   | Exports 2014<br>(\$ Millions) | Jobs 2014 | Export per job<br>2014 (\$) | LQ 2014 |
|--|-------------------------------|-----------|-----------------------------|---------|
| Other Gasoline Stations  | \$19.3                        | 307       | \$62,903                    | 39.2    |
| Gasoline Stations with Convenience Stores                        | \$12.7                        | 256       | \$49,601                    | 4.5     |
| Petroleum Bulk Stations and Terminals                            | \$30.3                        | 96        | \$316,908                   | 39.2    |
| Electric Power Distribution                                      | \$26.6                        | 78        | \$339,516                   | 5.1     |
| Plumbing, Heating, and Air-Conditioning Contractors              | \$3.5                         | 73        | \$48,511                    | 0.9     |
| Electrical Contractors and Other Wiring Installation Contractors | \$1.9                         | 60        | \$31,739                    | 0.8     |
| Natural Gas Distribution   | \$29.6                        | 45        | \$660,825                   | 5.4     |
| Crude Petroleum and Natural Gas Extraction                       | \$14.8                        | 36        | \$410,295                   | 0.6     |
| Power and Communication Line and Related Structures Construction | \$2.8                         | 26        | \$106,957                   | 2.0     |
| Miscellaneous Intermediation                                     | \$0.1                         | 22        | \$3,644                     | 0.9     |
| Other Heavy and Civil Engineering Construction                   | \$0.9                         | 20        | \$43,264                    | 1.7     |
| Fuel Dealers   | \$1.1                         | 18        | \$62,608                    | 3.2     |
| Water and Sewer Line and Related Structures Construction         | \$0.6                         | 17        | \$33,659                    | 1.3     |
| Electric Bulk Power Transmission and Control                     | \$8.8                         | 16        | \$565,265                   | 8.6     |
| Engineering Services   | \$0.4                         | 14        | \$27,122                    | 0.2     |

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

### section 02

## Top 15 Inputs by Dollars

# Energy (Fossil And Renewable)

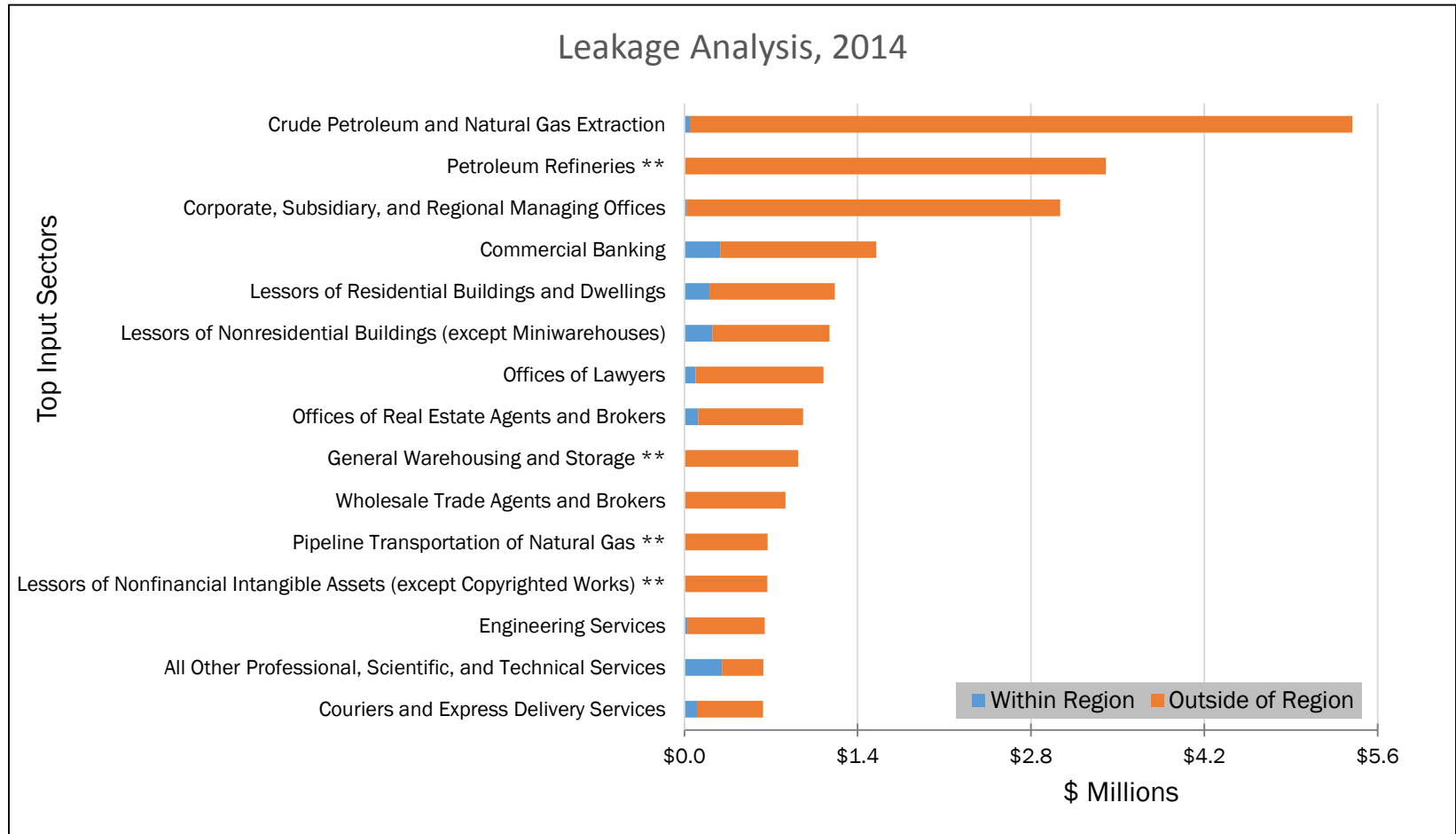
| Industries  | Estimated Input (\$ Millions), 2014 | % In-Region | % Out of Region |
|---|-------------------------------------|-------------|-----------------|
| Crude Petroleum and Natural Gas Extraction                              | \$5.40                              | 1%          | 99%             |
| Petroleum Refineries **   | \$3.40                              | 0%          | 100%            |
| Corporate, Subsidiary, and Regional Managing Offices *                  | \$3.04                              | 1%          | 99%             |
| Commercial Banking  | \$1.55                              | 19%         | 81%             |
| Lessors of Residential Buildings and Dwellings                          | \$1.21                              | 17%         | 83%             |
| Lessors of Nonresidential Buildings (except Miniwarehouses)             | \$1.17                              | 19%         | 81%             |
| Offices of Lawyers  | \$1.12                              | 8%          | 92%             |
| Offices of Real Estate Agents and Brokers                               | \$0.96                              | 12%         | 88%             |
| General Warehousing and Storage **                                      | \$0.92                              | 0%          | 100%            |
| Wholesale Trade Agents and Brokers *                                    | \$0.82                              | 1%          | 99%             |
| Pipeline Transportation of Natural Gas **                               | \$0.67                              | 0%          | 100%            |
| Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) ** | \$0.67                              | 0%          | 100%            |
| Engineering Services  | \$0.65                              | 4%          | 96%             |
| All Other Professional, Scientific, and Technical Services              | \$0.64                              | 48%         | 52%             |
| Couriers and Express Delivery Services                                  | \$0.64                              | 16%         | 84%             |

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

# Energy (Fossil And Renewable)



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

### section 02

## Top Occupations

# Energy (Fossil And Renewable)

| Occupations  | Jobs 2014 | % Change, 2009-2014 | Median Hr. Earnings | Entry Level Education             |
|--|-----------|---------------------|---------------------|-----------------------------------|
| Cashiers   | 350       | 3%                  | \$8.8               | No formal educational credential  |
| First-Line Supervisors of Retail Sales Workers                     | 77        | -6%                 | \$12.7              | High school diploma or equivalent |
| Construction Laborers  | 32        | 19%                 | \$11.0              | No formal educational credential  |
| General and Operations Managers                                    | 29        | 38%                 | \$33.5              | Bachelor's degree                 |
| Heavy and Tractor-Trailer Truck Drivers                            | 25        | 213%                | \$19.6              | Postsecondary nondegree award     |
| Electrical Power-Line Installers and Repairers                     | 25        | -11%                | \$25.7              | High school diploma or equivalent |
| Combined Food Preparation and Serving Workers, Including Fast Food | 20        | 11%                 | \$8.3               | No formal educational credential  |
| Carpenters   | 20        | 5%                  | \$12.2              | High school diploma or equivalent |
| Plumbers, Pipefitters, and Steamfitters                            | 19        | 19%                 | \$18.9              | High school diploma or equivalent |
| Electricians   | 18        | -25%                | \$17.4              | High school diploma or equivalent |
| Managers, All Other  | 17        | 89%                 | \$17.2              | Bachelor's degree                 |
| Automotive Service Technicians and Mechanics                       | 15        | -12%                | \$13.7              | Postsecondary nondegree award     |
| Retail Salespersons  | 15        | 7%                  | \$10.2              | No formal educational credential  |
| Customer Service Representatives                                   | 14        | 27%                 | \$13.1              | High school diploma or equivalent |
| Electrical Engineers   | 14        | 17%                 | \$39.6              | Bachelor's degree                 |

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

### section 02

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

# Transportation and Logistics

| 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                             |
| Rail transportation   | 127       | 5                         | 2                         | 7                          | 59                           | ↑ 52                            |
| General Freight Trucking, Long-Distance, Truckload              | 75        | 10                        | -3                        | 7                          | -83                          | -90                             |
| Couriers and Express Delivery Services                          | 46        | 2                         | 1                         | 3                          | 14                           | ↑ 11                            |
| General Freight Trucking, Local                                 | 40        | 3                         | -1                        | 2                          | -6                           | -8                              |
| Motor Vehicle Towing  | 35        | 2                         | 3                         | 5                          | 8                            | ↑ 3                             |
| Specialized Freight (except Used Goods) Trucking, Long-Distance | 22        | 2                         | 4                         | 6                          | -10                          | -16                             |
| General Freight Trucking, Long-Distance, Less Than Truckload    | 22        | 2                         | 2                         | 4                          | -1                           | -5                              |
| Interurban and Rural Bus Transportation                         | 12        | 0                         | 0                         | 0                          | 9                            | ↑ 9                             |

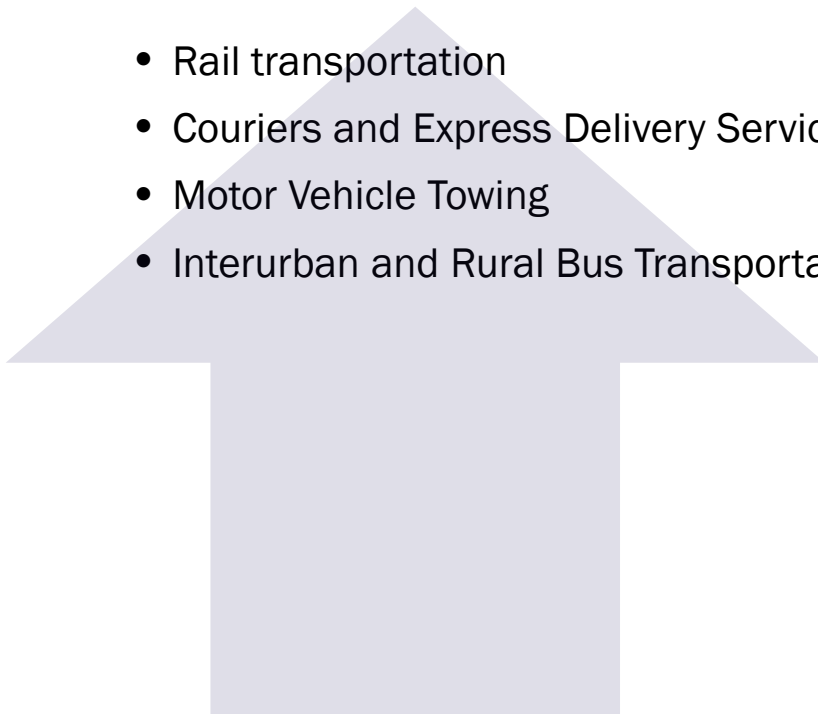
Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include complete jobs for Charter Bus Industry; Process, Physical Distribution, and Logistics Consulting Services; All Other Transit and Ground Passenger Transportation; Pipeline Transportation of Refined Petroleum Products; Support Activities for Rail Transportation; Other Support Activities for Air Transportation; and Specialized Freight (except Used Goods) Trucking, Local.

### section 02

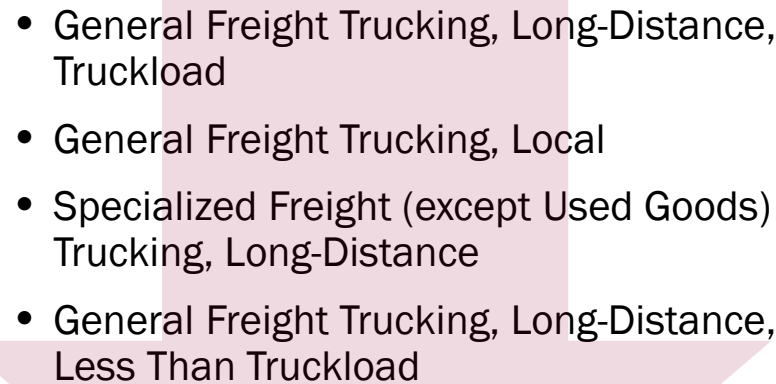
## Shift-Share Analysis

# Transportation and Logistics

### Industries that Outperformed

- 
- Rail transportation
  - Couriers and Express Delivery Services
  - Motor Vehicle Towing
  - Interurban and Rural Bus Transportation

### Industries that Underperformed

- 
- General Freight Trucking, Long-Distance, Truckload
  - General Freight Trucking, Local
  - Specialized Freight (except Used Goods) Trucking, Long-Distance
  - General Freight Trucking, Long-Distance, Less Than Truckload



## Top Industry Sectors

# Transportation and Logistics

| Industries  | Exports 2014<br>(\$ Millions) | Jobs 2014 | Export per job<br>2014 (\$) | LQ 2014 |
|---|-------------------------------|-----------|-----------------------------|---------|
| Rail transportation   | \$54.4                        | 127       | \$429,545                   | 7.3     |
| General Freight Trucking, Long-Distance, Truckload              | \$8.2                         | 75        | \$108,707                   | 1.3     |
| Couriers and Express Delivery Services                          | \$3.0                         | 46        | \$64,623                    | 0.9     |
| General Freight Trucking, Local                                 | \$2.4                         | 40        | \$59,904                    | 1.2     |
| Motor Vehicle Towing  | \$2.4                         | 35        | \$70,329                    | 5.6     |
| Specialized Freight (except Used Goods) Trucking, Long-Distance | \$2.2                         | 22        | \$100,174                   | 2.2     |
| General Freight Trucking, Long-Distance, Less Than Truckload    | \$3.2                         | 22        | \$146,667                   | 1.1     |
| Interurban and Rural Bus Transportation                         | \$1.3                         | 12        | \$102,640                   | 8.5     |

Note: Sorted similarly as the shift-share analysis slide. EMSI does not include complete jobs for Charter Bus Industry; Process, Physical Distribution, and Logistics Consulting Services; All Other Transit and Ground Passenger Transportation; Pipeline Transportation of Refined Petroleum Products; Support Activities for Rail Transportation; Other Support Activities for Air Transportation; and Specialized Freight (except Used Goods) Trucking, Local.

### section 02

## Top 15 Inputs by Dollars

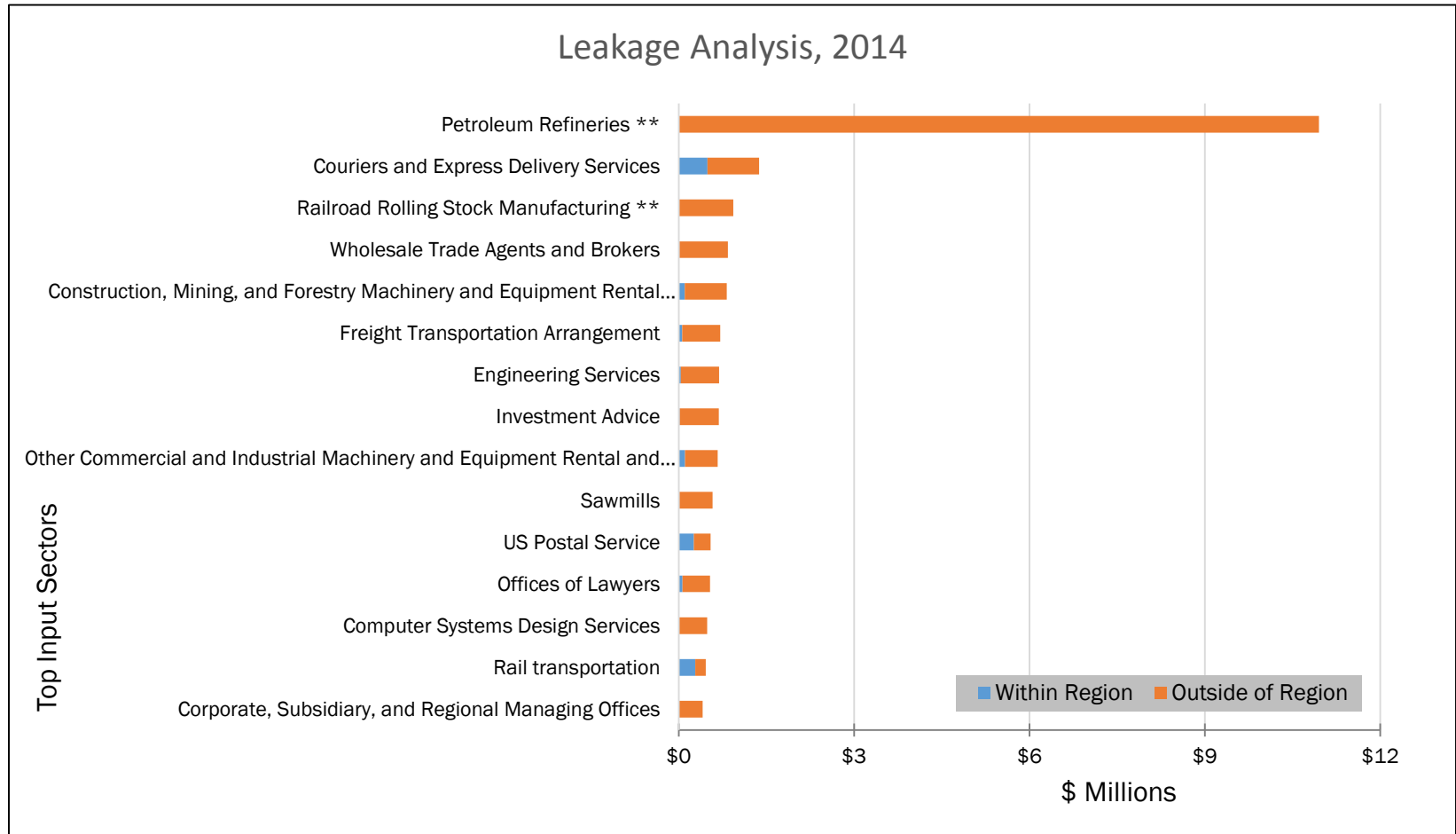
# Transportation and Logistics

| Industries  | Estimated Input<br>(\$ Millions), 2014 | % In-Region | % Out of Region |
|---|--|-------------|-----------------|
| Petroleum Refineries **   | \$10.95                                | 0%          | 100%            |
| Couriers and Express Delivery Services  | \$1.37                                 | 36%         | 64%             |
| Railroad Rolling Stock Manufacturing **                                       | \$0.93                                 | 0%          | 100%            |
| Wholesale Trade Agents and Brokers *  | \$0.84                                 | 1%          | 99%             |
| Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing | \$0.82                                 | 13%         | 87%             |
| Freight Transportation Arrangement *  | \$0.71                                 | 8%          | 92%             |
| Engineering Services  | \$0.69                                 | 5%          | 95%             |
| Investment Advice   | \$0.68                                 | 2%          | 98%             |
| Other Commercial and Industrial Machinery and Equipment Rental and Leasing    | \$0.67                                 | 16%         | 84%             |
| Sawmills *  | \$0.58                                 | 2%          | 98%             |
| US Postal Service   | \$0.54                                 | 48%         | 52%             |
| Offices of Lawyers  | \$0.53                                 | 11%         | 89%             |
| Computer Systems Design Services *  | \$0.49                                 | 1%          | 99%             |
| Rail transportation   | \$0.46                                 | 61%         | 39%             |
| Corporate, Subsidiary, and Regional Managing Offices *                        | \$0.41                                 | 2%          | 98%             |

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

# Transportation and Logistics



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

## section 02

## Top Occupations

# Transportation and Logistics

| Occupations  | Jobs 2014 | % Change, 2009-2014 | Median Hr. Earnings | Entry Level Education             |
|--|-----------|---------------------|---------------------|-----------------------------------|
| Heavy and Tractor-Trailer Truck Drivers                | 147       | -33%                | \$19.6              | Postsecondary nondegree award     |
| Light Truck or Delivery Services Drivers               | 25        | 25%                 | \$14.9              | High school diploma or equivalent |
| Couriers and Messengers                                | 23        | 10%                 | \$16.1              | High school diploma or equivalent |
| Railroad Conductors and Yardmasters                    | 23        | 92%                 | \$34.3              | High school diploma or equivalent |
| Locomotive Engineers                                   | 21        | 75%                 | \$31.7              | High school diploma or equivalent |
| Laborers and Freight, Stock, and Material Movers, Hand | 16        | -11%                | \$12.6              | No formal educational credential  |
| Railroad Brake, Signal, and Switch Operators           | 10        | 67%                 | \$27.4              | High school diploma or equivalent |

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives. EMSI does not include complete jobs for Customer Service Representatives; Transit and Railroad Police; Civil Engineers; Payroll and Timekeeping Clerks; File Clerks; Cargo and Freight Agents; Production, Planning, and Expediting Clerks; and Reservation and Transportation Ticket Agents and Travel Clerks.

### section 02

# 03 Cluster Comparisons

**Agribusiness, Food Processing  
and Technology**

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**Arts, Entertainment,  
Recreation and Visitor  
Industries**

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**Biomedical/Biotechnical (Life  
Sciences)**

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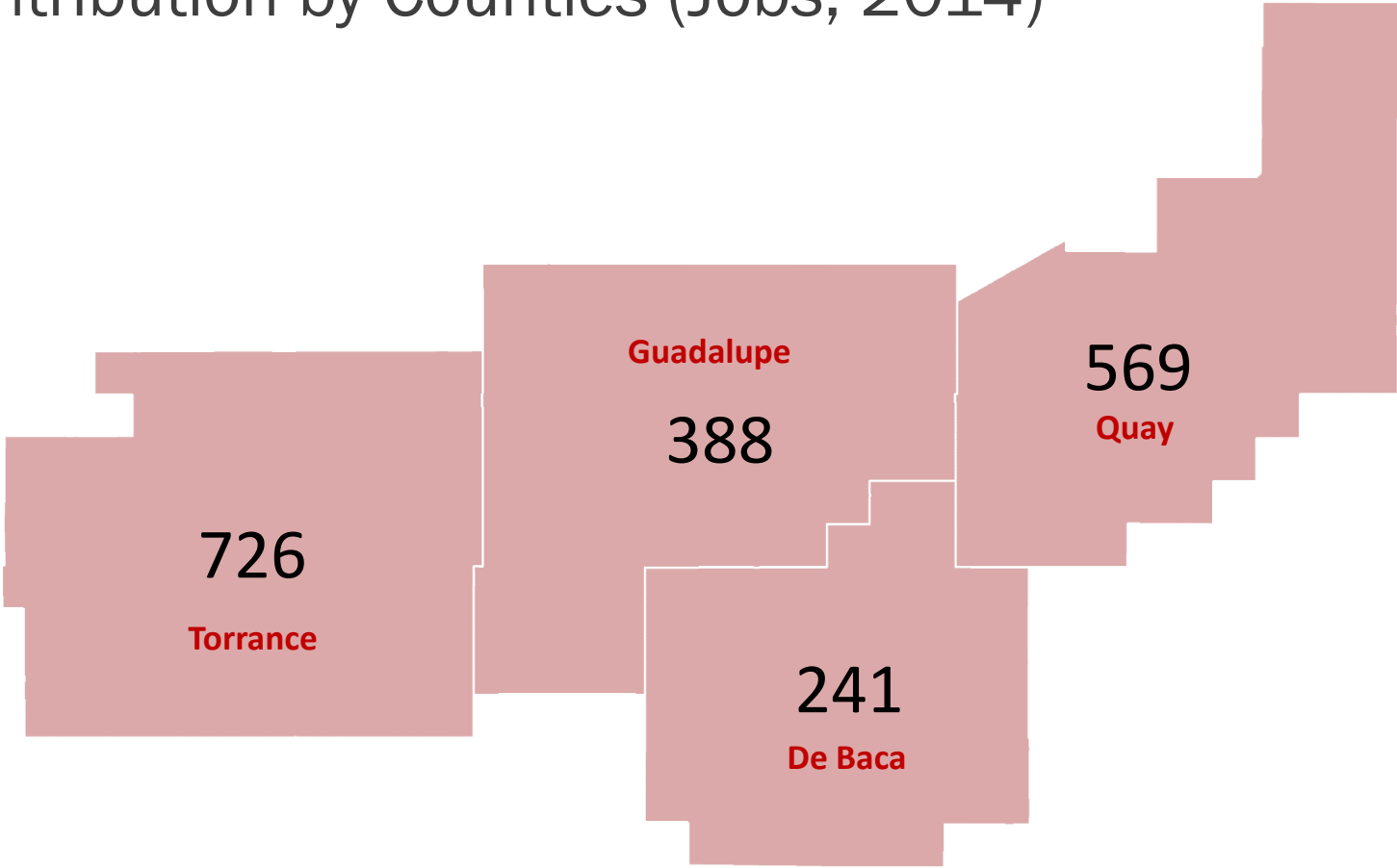
**Energy (Fossil and Renewable)**

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**Transportation and Logistics**

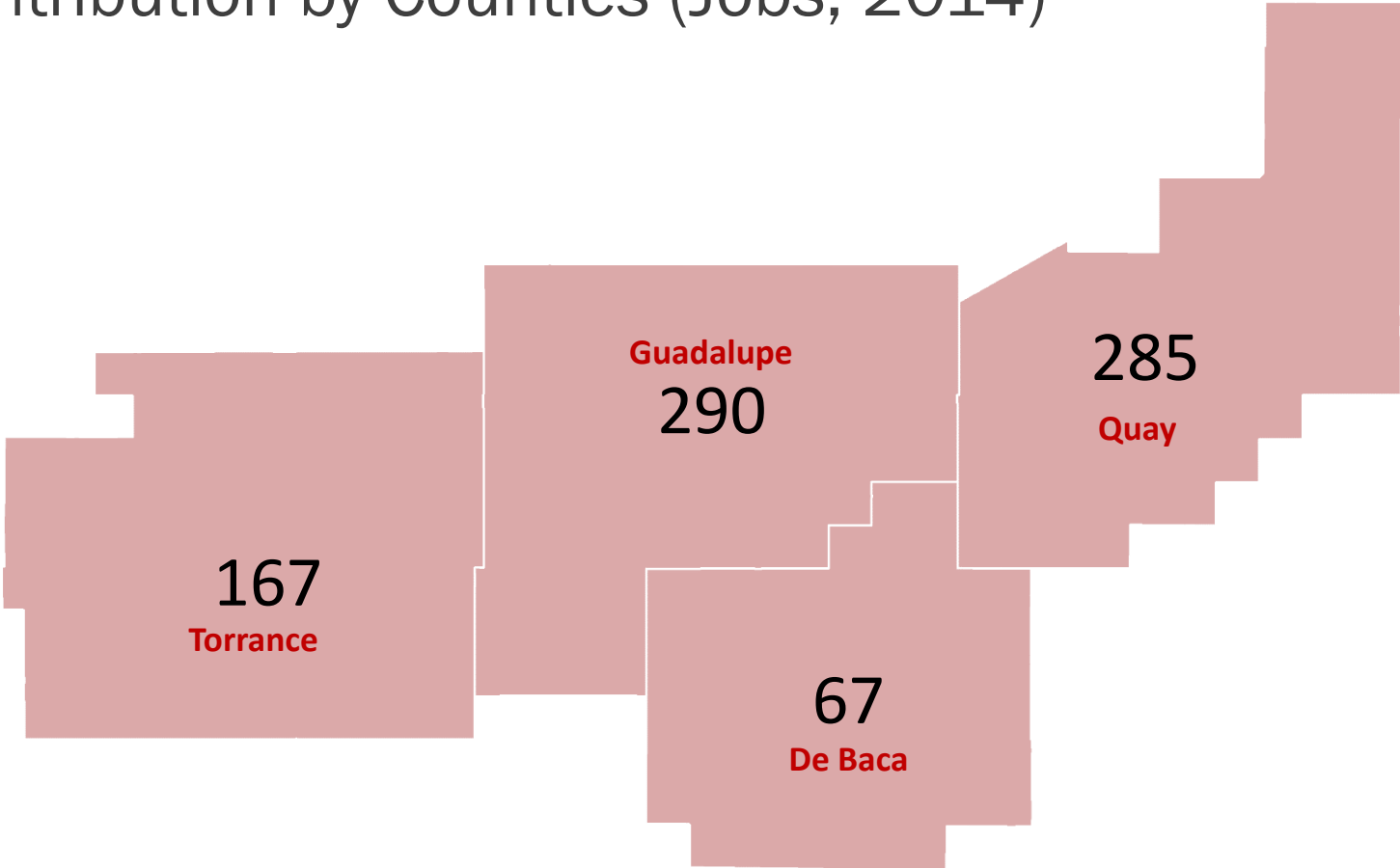
Agribusiness, Food Processing and Technology

# Contribution by Counties (Jobs, 2014)



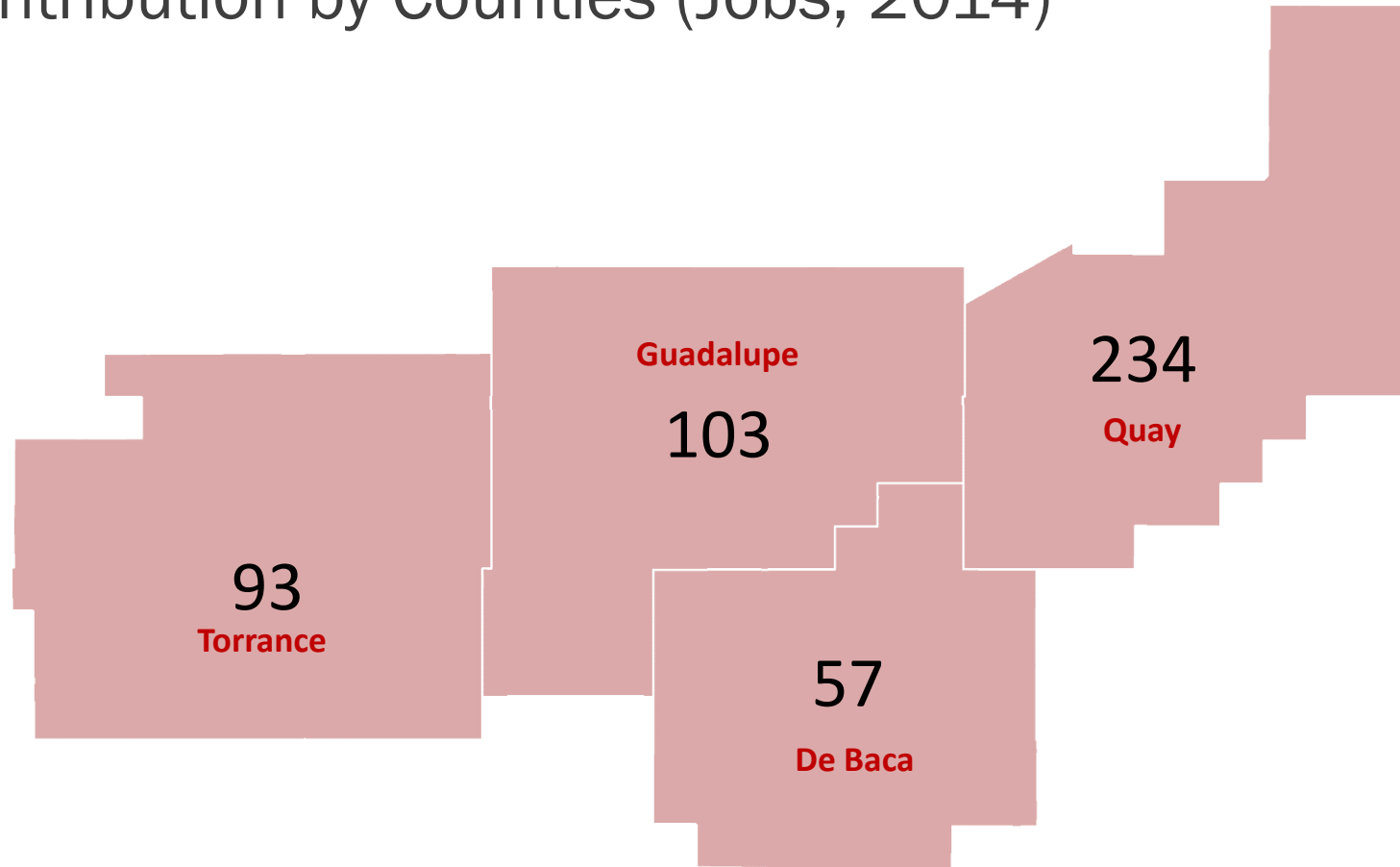
Arts, Entertainment, Recreation and Visitor Industries

Contribution by Counties (Jobs, 2014)



## Biomedical/Biotechnical (Life Sciences)

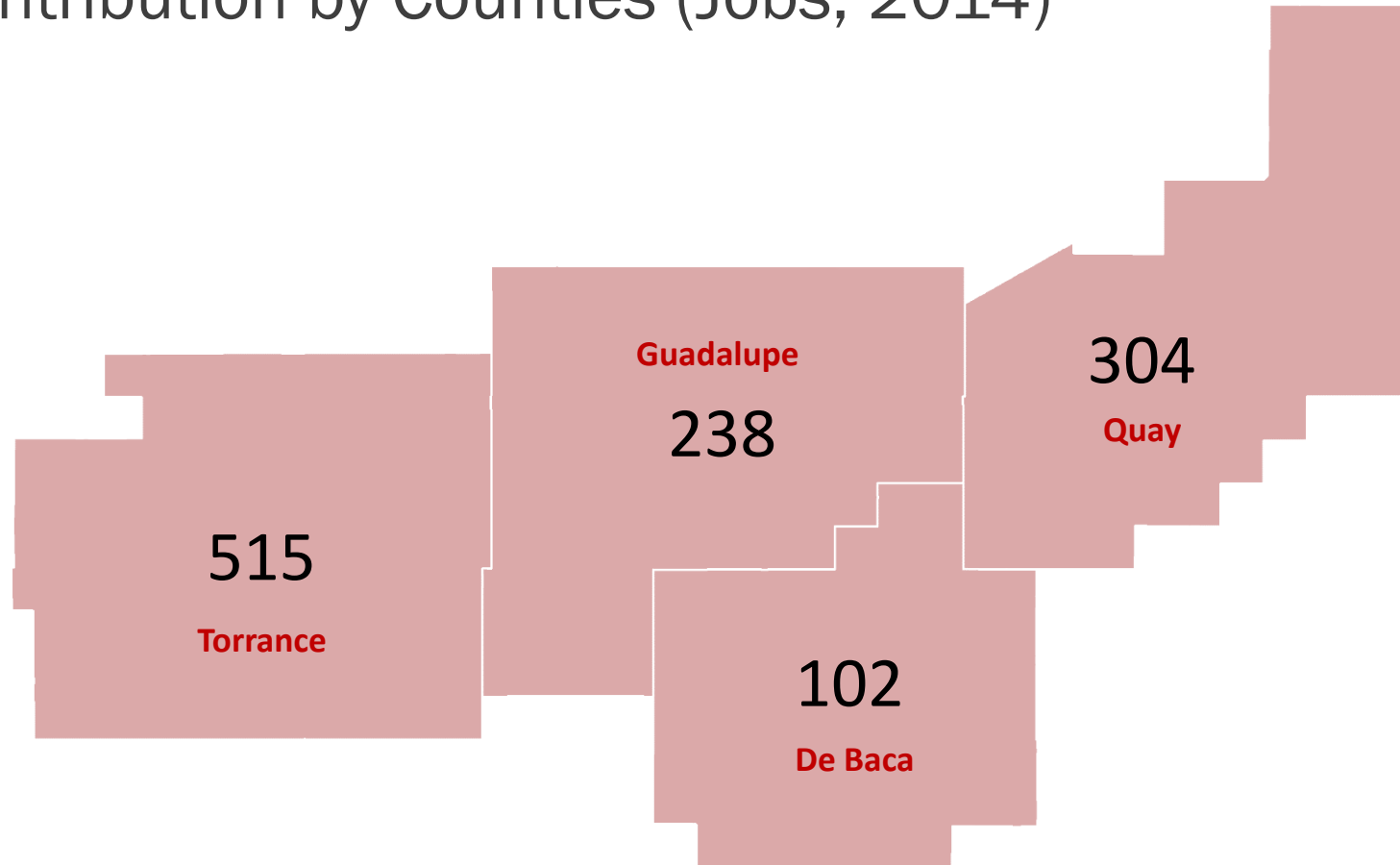
### Contribution by Counties (Jobs, 2014)





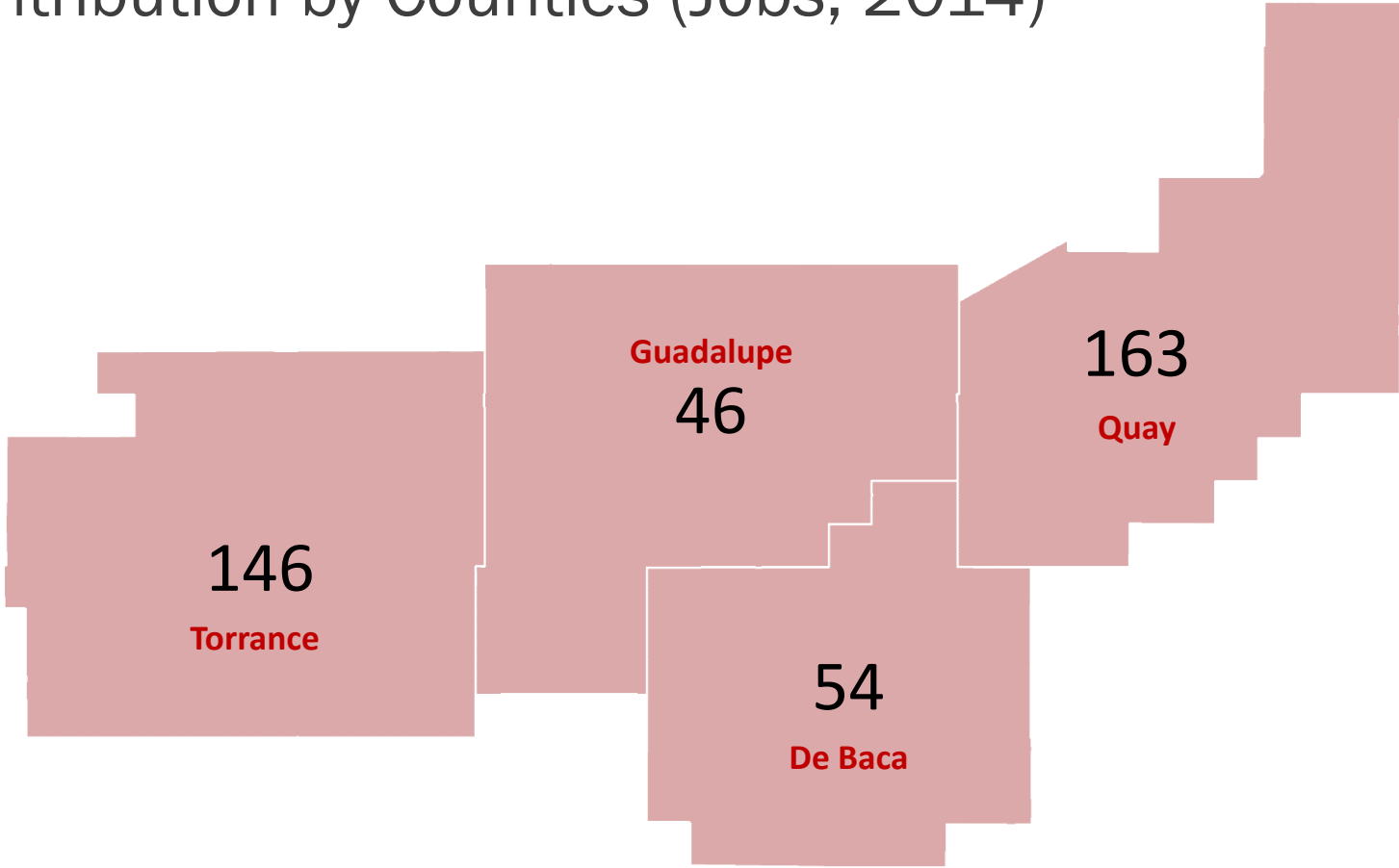
## Energy (Fossil and Renewable)

### Contribution by Counties (Jobs, 2014)



# Transportation and Logistics

## Contribution by Counties (Jobs, 2014)



## Industry Clusters: Components to Assess

|  | Agribusiness, Food Processing and Technology  | Art, Entertainment, Recreation and Visitor Industries | Biomedical/Biotechnical (Life Sciences) | Energy (Fossil and Renewable) | Transportation and Logistics |
|--|---|---|---|-------------------------------|------------------------------|
| Regional Performance, 2009-2014 (Shift-share analysis) | 301<br>(positive value)   | 78<br>(positive value)                                | 58<br>(positive value)                  | 11<br>(positive value)        | -67<br>(negative value)      |
| Export value, 2014                                     | \$501,003,155   | \$43,572,906  | \$26,170,922                            | \$165,788,453                 | \$80,683,936                 |
| Leakage, 2014  | \$254,748,413   | \$16,581,898  | \$17,562,511                            | \$54,423,266                  | \$39,021,772                 |
| Number of establishments                               | 43  | 45  | 24                                      | 91                            | 37                           |
| Contribution by counties                               | 4   | 4   | 4                                       | 4                             | 4                            |
| 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   |   |   |                               |                              |

Note: Number of establishments is for 2016

### section 03