

Regional Data Snapshot

Target Industry Cluster
SET Session 2

Southeast Arkansas Economic Development District, AR



Center for Regional Development
Advancing Collaboration : Energizing Regions

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01 overview

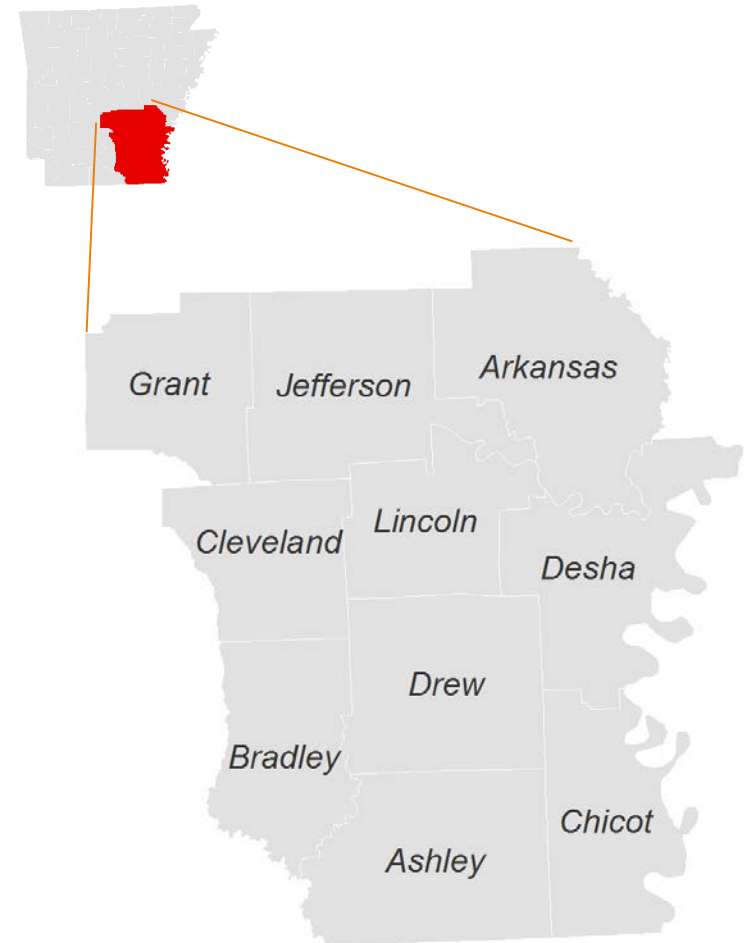
**Southeast AR Economic
Development District, AR**

Overview

SAEDD, Arkansas

The Southeast Arkansas Economic Development District is comprised of 10 Arkansas counties. Interstate 530 connects the region to Little Rock. U.S. Route 79 passes through the region. Arkansas River is the major navigable waterway. Major railroads include UP and DSRR. Majority of airports are municipal and smaller airfields.

- Arkansas
- Ashley
- Bradley
- Chicot
- Cleveland
- Desha
- Drew
- Grant
- Jefferson
- Lincoln



02 target industry clusters

**Agribusiness, Food Processing
And Technology**

Chemicals

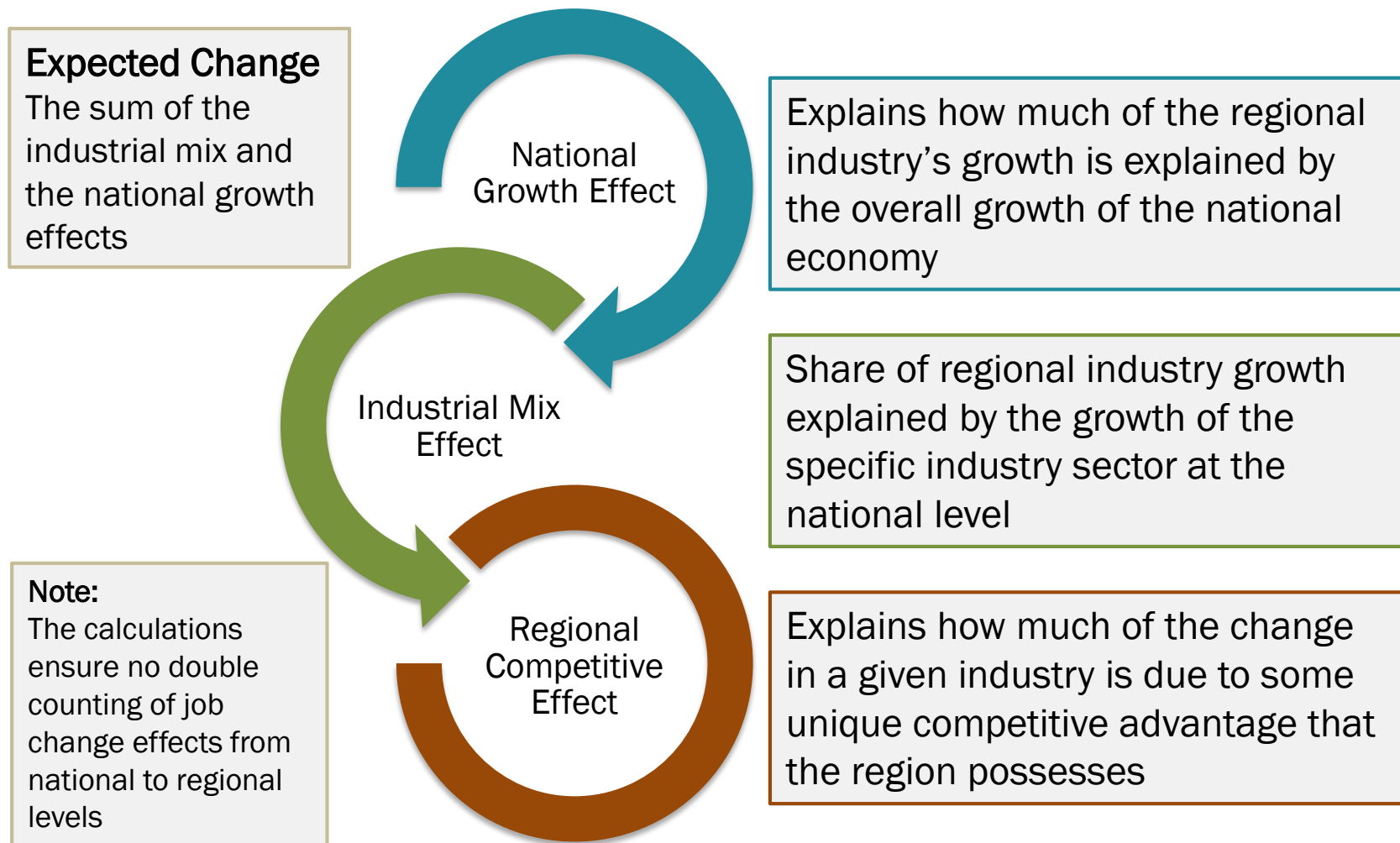
**Arts, Entertainment,
Recreation And Visitor
Industries**

Forest And Wood Products

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 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Crop Production	2,972	320	-303	17	238	↑ 222
Poultry Processing	1,667	249	-205	44	-462	-506
Rice Milling	1,171	118	8	126	163	↑ 38
Animal Production	903	118	-119	-1	-107	-106
Farm Supplies Merchant Wholesalers	519	50	-7	43	93	↑ 49
Farm Labor Contractors and Crew Leaders	450	50	16	66	23	-42
Farm and Garden Machinery and Equipment Merchant Wholesalers	400	38	-17	21	78	↑ 57
Farm Machinery and Equipment Manufacturing	390	23	-8	15	193	↑ 177
Soil Preparation, Planting, and Cultivating	309	37	34	71	-9	-81
Soybean and Other Oilseed Processing	264	37	-23	14	-53	-67
Cotton Ginning	111	16	-26	-10	-24	-14
Postharvest Crop Activities (except Cotton Ginning)	96	13	1	14	-18	-33
Retail Bakeries	95	8	18	26	30	↑ 4
Grain and Field Bean Merchant Wholesalers	88	5	-1	4	46	↑ 42
Farm Management Services	40	6	9	15	-14	-30

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Crop Production
- Farm Machinery and Equipment Manufacturing
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Farm Supplies Merchant Wholesalers
- Grain and Field Bean Merchant Wholesalers
- Rice Milling
- Retail Bakeries

Industries that Underperformed

- Cotton Ginning
- Farm Management Services
- Postharvest Crop Activities (except Cotton Ginning)
- Farm Labor Contractors and Crew Leaders
- Soybean and Other Oilseed Processing
- Soil Preparation, Planting, and Cultivating
- Animal Production
- Poultry Processing

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Crop Production	\$286.82	2,972	\$96,519	4.03
Poultry Processing	\$397.82	1,667	\$238,663	14.60
Rice Milling	\$878.70	1,171	\$750,149	480.86
Animal Production	\$170.20	903	\$188,482	1.56
Farm Supplies Merchant Wholesalers	\$70.34	519	\$135,557	8.51
Farm Labor Contractors and Crew Leaders	\$1.72	450	\$3,819	2.75
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$46.65	400	\$116,641	7.60
Farm Machinery and Equipment Manufacturing	\$86.90	390	\$222,848	12.81
Soil Preparation, Planting, and Cultivating	\$14.82	309	\$47,947	7.45
Soybean and Other Oilseed Processing	\$398.71	264	\$1,509,090	60.36
Cotton Ginning	\$4.54	111	\$40,767	22.44
Postharvest Crop Activities (except Cotton Ginning)	\$2.41	96	\$25,248	1.88
Retail Bakeries	\$11.35	95	\$119,946	1.75
Grain and Field Bean Merchant Wholesalers	\$10.45	88	\$118,602	3.20
Farm Management Services	\$0.29	40	\$7,191	2.33

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

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Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

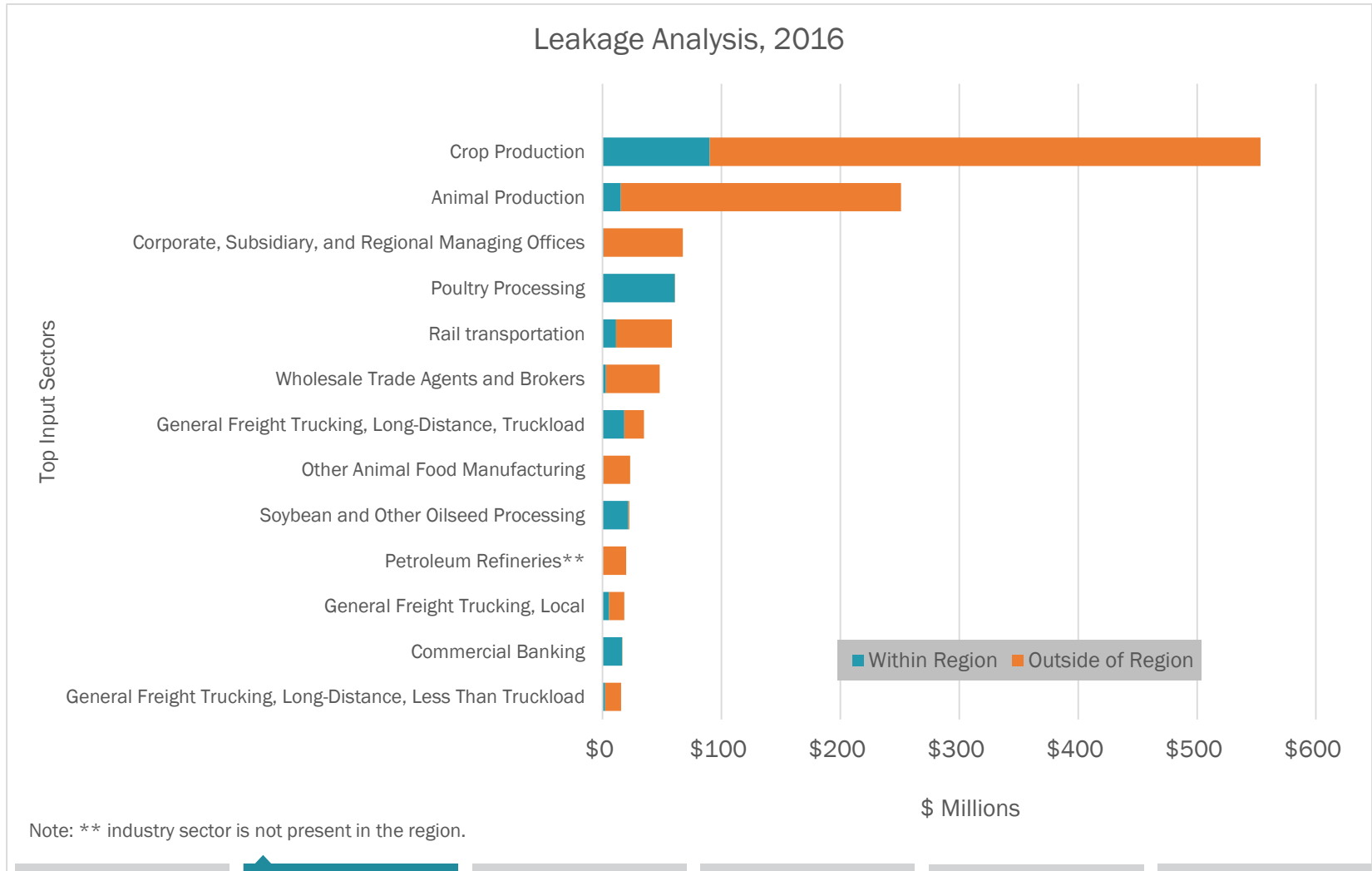
Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Crop Production	\$553.43	16.3%	83.7%
Animal Production	\$251.09	6.1%	93.9%
Corporate, Subsidiary, and Regional Managing Offices	\$67.63	1.3%	98.7%
Poultry Processing	\$60.91	99.8%	0.2%
Rail transportation	\$58.36	19.5%	80.5%
Wholesale Trade Agents and Brokers	\$48.02	6.1%	93.9%
General Freight Trucking, Long-Distance, Truckload	\$34.86	52.8%	47.2%
Other Animal Food Manufacturing	\$23.28	2.5%	97.5%
Soybean and Other Oilseed Processing	\$22.56	95.8%	4.2%
Petroleum Refineries**	\$19.90	0.0%	100.0%
General Freight Trucking, Local	\$18.20	30.9%	69.1%
Commercial Banking	\$16.74	99.0%	1.0%
General Freight Trucking, Long-Distance, Less Than Truckload	\$15.72	13.9%	86.1%
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers**	\$15.20	0.0%	100.0%
Farm Labor Contractors and Crew Leaders	\$14.16	66.9%	33.1%

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

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Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology



section 02

Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,658	-6%	\$14.59	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	1,053	19%	\$9.69	No formal educational credential
Meat, Poultry, and Fish Cutters and Trimmers	323	-22%	\$14.19	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	268	-3%	\$11.11	No formal educational credential
Graders and Sorters, Agricultural Products	225	-8%	\$10.71	No formal educational credential
Agricultural Equipment Operators	218	14%	\$10.77	No formal educational credential
Industrial Machinery Mechanics	207	9%	\$23.85	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	185	-2%	\$25.63	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	179	-9%	\$13.72	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	157	13%	\$20.48	High school diploma or equivalent
Food Batchmakers	157	-7%	\$11.64	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	138	3%	\$18.19	Postsecondary nondegree award
Farmworkers, Farm, Ranch, and Aquacultural Animals	131	31%	\$10.24	No formal educational credential
Industrial Truck and Tractor Operators	129	-2%	\$13.49	No formal educational credential
Packers and Packers, Hand	124	-13%	\$10.63	No formal educational credential

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2016. 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

Chemicals

Industries	Jobs 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Plastics Material and Resin Manufacturing	245	25	0	25	34	↑ 9
Unlaminated Plastics Profile Shape Manufacturing	119	12	-4	8	14	↑ 6
Ready-Mix Concrete Manufacturing	116	5	0	5	75	↑ 70
Polystyrene Foam Product Manufacturing	100	4	3	7	68	↑ 61
Petroleum Bulk Stations and Terminals	93	14	-11	3	-29	-33
All Other Plastics Product Manufacturing	83	4	1	5	48	↑ 43
Printing Ink Manufacturing	81	7	-10	-3	25	↑ 28
Cement Manufacturing	73	5	-6	-1	26	↑ 26
Plastics Bottle Manufacturing	66	3	-3	0	39	↑ 40
Other Chemical and Allied Products Merchant Wholesalers	35	2	-1	1	16	↑ 15
Other Basic Inorganic Chemical Manufacturing	34	12	-13	-1	-69	-68
Mineral Wool Manufacturing	25	4	-3	1	-11	-12
Polish and Other Sanitation Good Manufacturing*	23	1	0	1	Insf. Data	↑ 17
Concrete Pipe Manufacturing*	21	0	0	0	Insf. Data	↑ 19
Plastics Packaging Film and Sheet (including Laminated) Manufacturing	14	0	1	1	14	↑ 13

Note: Upward arrow (↑) indicates regional competitiveness. *: Employment at 2010 was less than 10.

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Shift-Share Analysis

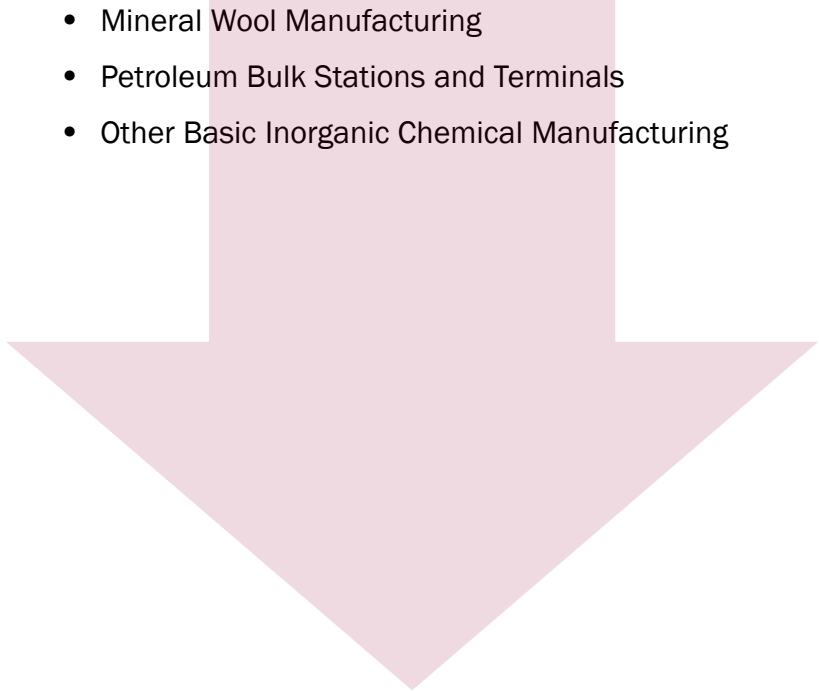
Chemicals

Industries that Outperformed

- 
- Ready-Mix Concrete Manufacturing
 - Polystyrene Foam Product Manufacturing
 - All Other Plastics Product Manufacturing
 - Plastics Bottle Manufacturing
 - Printing Ink Manufacturing
 - Cement Manufacturing
 - Concrete Pipe Manufacturing
 - Polish and Other Sanitation Good Manufacturing
 - Other Chemical and Allied Products Merchant Wholesalers
 - Plastics Packaging Film and Sheet (including Laminated) Manufacturing
 - Plastics Material and Resin Manufacturing
 - Unlaminated Plastics Profile Shape Manufacturing

Note: Medical Laboratories; Diagnostic Imaging Centers; and Ambulance Services industries also outperformed in the region.

Industries that Underperformed

- 
- Mineral Wool Manufacturing
 - Petroleum Bulk Stations and Terminals
 - Other Basic Inorganic Chemical Manufacturing

Top Industry Sectors

Chemicals

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Plastics Material and Resin Manufacturing	\$240.75	245	\$981,701	8.42
Unlaminated Plastics Profile Shape Manufacturing	\$37.73	119	\$316,506	9.88
Ready-Mix Concrete Manufacturing	\$23.50	116	\$202,049	2.38
Polystyrene Foam Product Manufacturing	\$16.43	100	\$163,855	6.45
Petroleum Bulk Stations and Terminals	\$7.29	93	\$78,469	5.46
All Other Plastics Product Manufacturing	\$31.14	83	\$376,342	0.54
Printing Ink Manufacturing	\$57.29	81	\$704,622	17.19
Cement Manufacturing	\$45.35	73	\$624,155	10.73
Plastics Bottle Manufacturing	\$22.11	66	\$333,508	4.15
Other Chemical and Allied Products Merchant Wholesalers	\$1.84	35	\$53,296	0.62
Other Basic Inorganic Chemical Manufacturing	\$11.52	34	\$340,338	1.73
Mineral Wool Manufacturing	\$4.47	25	\$176,225	2.98
Polish and Other Sanitation Good Manufacturing	\$6.53	23	\$278,996	1.74
Concrete Pipe Manufacturing	\$6.47	21	\$301,806	5.64
Plastics Packaging Film and Sheet (including Laminated) Manufacturing	\$5.56	14	\$397,182	1.38

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

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Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Chemicals

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Plastics Material and Resin Manufacturing	\$36.29	11.3%	88.7%
Petrochemical Manufacturing**	\$33.90	0.0%	100.0%
All Other Basic Organic Chemical Manufacturing**	\$32.21	0.0%	100.0%
Corporate, Subsidiary, and Regional Managing Offices	\$28.04	0.6%	99.4%
Ethyl Alcohol Manufacturing*	\$7.69	71.4%	28.6%
Rail transportation	\$6.69	53.2%	46.8%
Petroleum Refineries**	\$6.58	0.0%	100.0%
Cement Manufacturing	\$6.31	97.0%	3.0%
Synthetic Dye and Pigment Manufacturing**	\$5.09	0.0%	100.0%
Other Basic Inorganic Chemical Manufacturing	\$4.71	11.2%	88.8%
Wholesale Trade Agents and Brokers	\$4.28	8.0%	92.0%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$4.26	28.2%	71.8%
Natural Gas Distribution	\$3.81	58.6%	41.4%
Paint and Coating Manufacturing**	\$3.62	0.0%	100.0%
Construction Sand and Gravel Mining	\$2.95	19.0%	81.0%

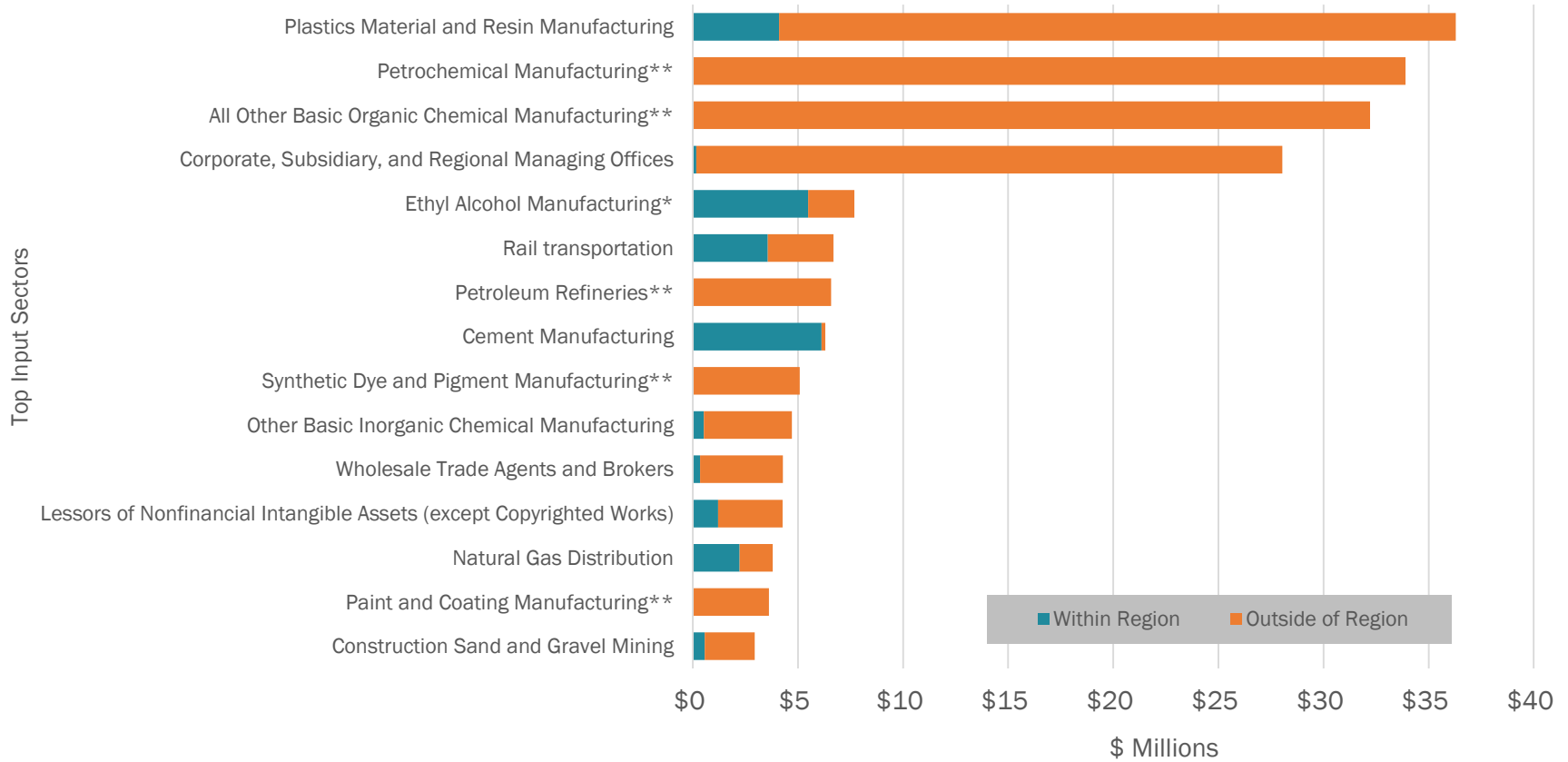
Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars

Chemicals

Leakage Analysis, 2016



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 Occupations

Chemicals

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	131	39%	\$18.19	Postsecondary nondegree award
Chemical Equipment Operators and Tenders	96	-9%	\$23.35	High school diploma or equivalent
Mixing and Blending Machine Setters, Operators, and Tenders	63	21%	\$21.79	High school diploma or equivalent
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	51	82%	\$12.66	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	45	32%	\$25.63	High school diploma or equivalent
Team Assemblers	39	56%	\$13.55	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	33	22%	\$20.48	High school diploma or equivalent
Industrial Machinery Mechanics	32	39%	\$23.85	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	29	38%	\$11.11	No formal educational credential
Inspectors, Testers, Sorters, Samplers, and Weighers	28	47%	\$15.07	High school diploma or equivalent
Maintenance and Repair Workers, General	25	19%	\$15.52	High school diploma or equivalent
General and Operations Managers	25	19%	\$30.56	Bachelor's degree
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	25	108%	\$16.59	High school diploma or equivalent
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	22	57%	\$19.68	High school diploma or equivalent
Chemical Plant and System Operators	22	-19%	\$26.60	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 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	467	49	9	58	52	-6
Independent Artists, Writers, and Performers	154	16	4	20	14	-6
Golf Courses and Country Clubs	148	17	-5	12	2	-10
Fitness and Recreational Sports Centers	128	13	10	23	18	-5
Other Spectator Sports	59	6	-3	3	7	↑ 4
All Other Amusement and Recreation Industries	50	6	11	17	2	-14
Radio Stations	43	5	-6	-1	-1	↑ 0
Motion Picture Theaters (except Drive-Ins)	42	7	-1	6	-17	-23
Recreational and Vacation Camps (except Campgrounds)	41	2	2	4	27	↑ 24
Sporting and Recreational Goods and Supplies Merchant Wholesalers	35	2	5	7	19	↑ 13
Bowling Centers	30	4	-4	0	0	↑ 1
Musical Groups and Artists	25	3	7	10	-3	-14
Racetracks	12	2	-3	-1	-6	-5
Bed-and-Breakfast Inns*	11	0	0	0	Insf. Data	↑ 7
Amusement Arcades*	11	0	0	0	Insf. Data	↑ 8

Note: Upward arrow (↑) indicates regional competitiveness. *: Employment at 2010 was less than 10.

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Shift-Share Analysis

Arts, Entertainment, Recreation And Visitor Industries

Industries that Outperformed

- 
- Recreational and Vacation Camps (except Campgrounds)
 - Sporting and Recreational Goods and Supplies Merchant Wholesalers
 - Amusement Arcades
 - Bed-and-Breakfast Inns
 - Other Spectator Sports
 - Bowling Centers
 - Radio Stations

Industries that Underperformed

- 
- Fitness and Recreational Sports Centers
 - Racetracks
 - Hotels (except Casino Hotels) and Motels
 - Independent Artists, Writers, and Performers
 - Golf Courses and Country Clubs
 - Musical Groups and Artists
 - All Other Amusement and Recreation Industries
 - Motion Picture Theaters (except Drive-Ins)

Top Industry Sectors

Arts, Entertainment, Recreation And Visitor Industries

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Hotels (except Casino Hotels) and Motels	\$3.33	467	\$7,136	0.56
Independent Artists, Writers, and Performers	\$0.65	154	\$4,232	0.25
Golf Courses and Country Clubs	\$0.36	148	\$2,455	0.73
Fitness and Recreational Sports Centers	\$0.45	128	\$3,530	0.33
Other Spectator Sports	\$0.05	59	\$888	0.63
All Other Amusement and Recreation Industries	\$0.30	50	\$5,987	0.33
Radio Stations	\$3.10	43	\$71,310	0.91
Motion Picture Theaters (except Drive-Ins)	\$1.69	42	\$40,528	0.58
Recreational and Vacation Camps (except Campgrounds)	\$1.77	41	\$43,445	1.91
Sporting and Recreational Goods and Supplies Merchant Wholesalers	\$1.04	35	\$29,769	0.82
Bowling Centers	\$0.07	30	\$2,372	0.78
Musical Groups and Artists	\$0.05	25	\$1,857	0.44
Racetracks	\$0.00	12	\$145	0.36
Bed-and-Breakfast Inns	\$0.41	11	\$35,465	0.74
Amusement Arcades	\$0.28	11	\$24,311	0.70

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), 2016	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$2.66	0.8%	99.2%
Lessors of Residential Buildings and Dwellings	\$1.06	96.6%	3.4%
Offices of Real Estate Agents and Brokers	\$0.87	22.5%	77.5%
Television Broadcasting*	\$0.65	2.8%	97.2%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.63	53.0%	47.0%
Sports Teams and Clubs*	\$0.55	0.7%	99.3%
Other Activities Related to Real Estate	\$0.53	18.2%	81.8%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$0.53	46.4%	53.6%
Advertising Agencies	\$0.48	3.3%	96.7%
Offices of Lawyers	\$0.48	18.3%	81.7%
Residential Property Managers	\$0.43	49.8%	50.2%
Motion Picture and Video Production*	\$0.36	0.6%	99.4%
Independent Artists, Writers, and Performers	\$0.36	9.4%	90.6%
Administrative Management and General Management Consulting Services	\$0.35	9.7%	90.3%
Janitorial Services	\$0.30	70.7%	29.3%

Note: * industry sector has less than 10 employments in the region.

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Top 15 Inputs by Dollars

Arts, Entertainment, Recreation And Visitor Industries

Leakage Analysis, 2016



Note: * industry sector has less than 10 employments in the region.

section 02

Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Arts, Entertainment, Recreation And Visitor Industries

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Hotel, Motel, and Resort Desk Clerks	138	15%	\$9.02	High school diploma or equivalent
Maids and Housekeeping Cleaners	129	16%	\$8.68	No formal educational credential
Fitness Trainers and Aerobics Instructors	82	28%	\$16.02	High school diploma or equivalent
Musicians and Singers	63	15%	\$12.16	No formal educational credential
Writers and Authors	56	27%	\$12.25	Bachelor's degree
Lodging Managers	53	71%	\$14.52	High school diploma or equivalent
Waiters and Waitresses	51	0%	\$8.99	No formal educational credential
Coaches and Scouts	35	21%	\$18.82	Bachelor's degree
Maintenance and Repair Workers, General	33	6%	\$15.52	High school diploma or equivalent
Fine Artists, Including Painters, Sculptors, and Illustrators	30	11%	\$7.11	Bachelor's degree
Amusement and Recreation Attendants	29	0%	\$8.53	No formal educational credential
Managers, All Other	27	200%	\$16.27	Bachelor's degree
Cooks, Restaurant	25	9%	\$9.35	No formal educational credential
Cashiers	19	-21%	\$8.97	No formal educational credential
General and Operations Managers	18	-5%	\$30.56	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2016. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

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

Forest And Wood Products

Industries	Jobs 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Paper (except Newsprint) Mills	1,204	165	-373	-208	-206	↑ 2
Logging	1,031	108	103	211	106	-105
Sawmills	749	79	-22	57	75	↑ 19
Newsprint Mills	721	125	-471	-346	-349	-3
Paper Bag and Coated and Treated Paper Manufacturing	573	103	-153	-50	-305	-254
Other Millwork (including Flooring)	463	58	-38	20	-37	-57
Paperboard Mills	450	12	-9	3	348	↑ 345
Support Activities for Forestry	221	39	8	47	-110	-157
Roofing Contractors	142	11	7	18	47	↑ 29
Cut Stock, Resawing Lumber, and Planing	141	13	1	14	28	↑ 13
Flooring Contractors	136	10	4	14	51	↑ 37
Nonupholstered Wood Household Furniture Manufacturing*	123	0	-1	-1	Insf. Data	↑ 120
Upholstered Household Furniture Manufacturing	112	12	10	22	12	-10
Finish Carpentry Contractors	98	17	4	21	-50	-71
Wood Container and Pallet Manufacturing	76	13	4	17	-35	-52


Note: Upward arrow (↑) indicates regional competitiveness. *: Employment at 2010 was less than 10.

section 02

Shift-Share Analysis

Forest And Wood Products

Industries that Outperformed

- 
- Paperboard Mills
 - Nonupholstered Wood Household Furniture Manufacturing
 - Flooring Contractors
 - Roofing Contractors
 - Sawmills
 - Cut Stock, Resawing Lumber, and Planing
 - Paper (except Newsprint) Mills

Industries that Underperformed

- 
- Newsprint Mills
 - Upholstered Household Furniture Manufacturing
 - Wood Container and Pallet Manufacturing
 - Other Millwork (including Flooring)
 - Finish Carpentry Contractors
 - Logging
 - Support Activities for Forestry
 - Paper Bag and Coated and Treated Paper Manufacturing

Top Industry Sectors

Forest And Wood Products

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Paper (except Newsprint) Mills	\$812.89	1,204	\$675,279	41.57
Logging	\$103.23	1,031	\$100,099	17.22
Sawmills	\$178.09	749	\$237,717	16.68
Newsprint Mills	\$513.30	721	\$712,394	274.26
Paper Bag and Coated and Treated Paper Manufacturing	\$121.61	573	\$212,184	19.40
Other Millwork (including Flooring)	\$75.01	463	\$162,047	20.87
Paperboard Mills	\$324.59	450	\$721,048	29.44
Support Activities for Forestry	\$9.41	221	\$42,585	11.33
Roofing Contractors	\$10.80	142	\$75,854	1.03
Cut Stock, Resawing Lumber, and Planing	\$25.73	141	\$182,986	17.24
Flooring Contractors	\$1.08	136	\$7,937	1.30
Nonupholstered Wood Household Furniture Manufacturing	\$10.61	123	\$86,140	6.03
Upholstered Household Furniture Manufacturing	\$16.36	112	\$145,879	3.48
Finish Carpentry Contractors	\$0.79	98	\$8,080	0.50
Wood Container and Pallet Manufacturing	\$6.77	76	\$89,366	2.22

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

section 02

Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Forest And Wood Products

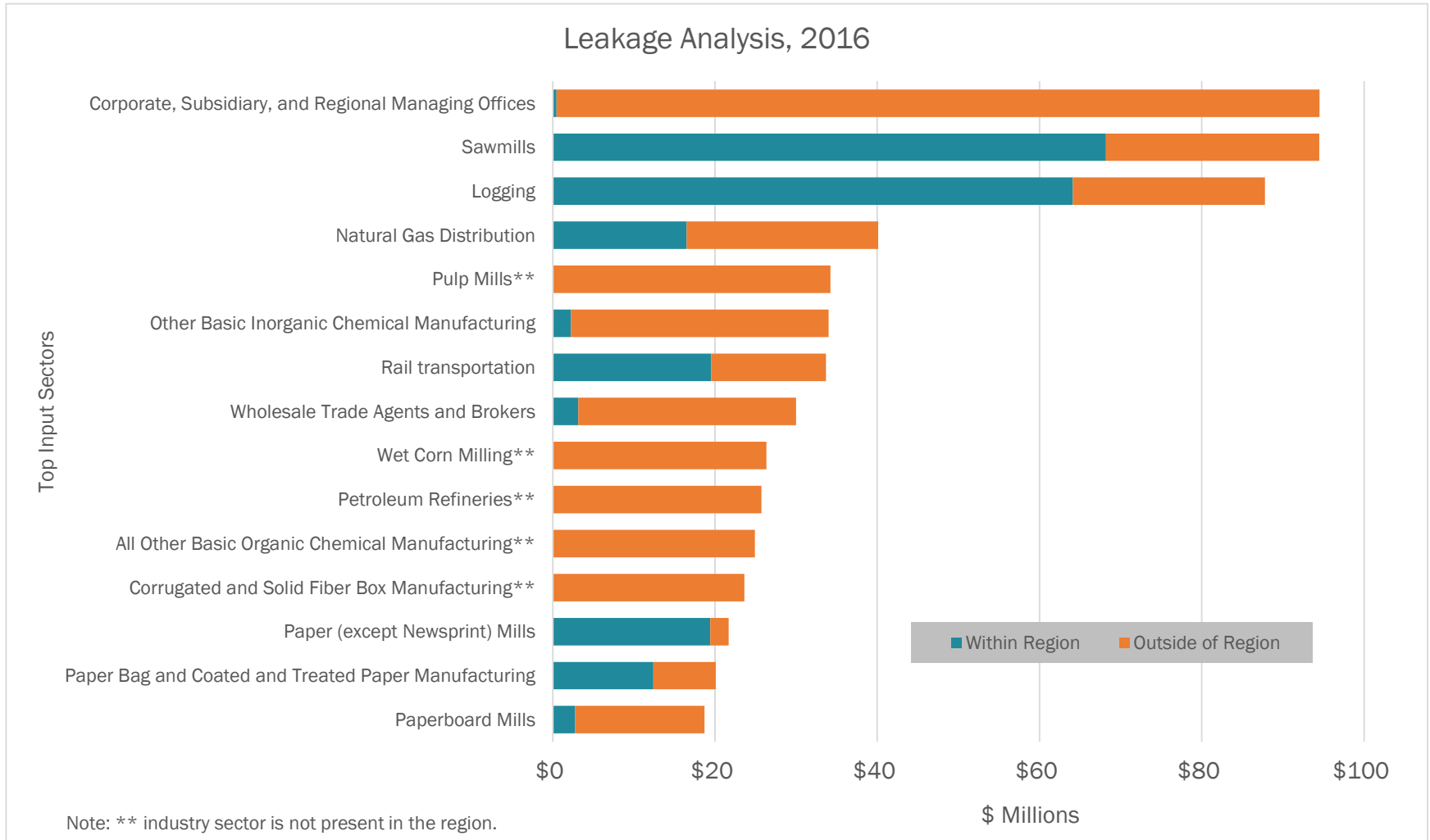
Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$94.50	0.5%	99.5%
Sawmills	\$94.48	72.2%	27.8%
Logging	\$87.77	73.0%	27.0%
Natural Gas Distribution	\$40.11	41.2%	58.8%
Pulp Mills**	\$34.22	0.0%	100.0%
Other Basic Inorganic Chemical Manufacturing	\$33.99	6.6%	93.4%
Rail transportation	\$33.67	58.0%	42.0%
Wholesale Trade Agents and Brokers	\$29.98	10.5%	89.5%
Wet Corn Milling**	\$26.33	0.0%	100.0%
Petroleum Refineries**	\$25.72	0.0%	100.0%
All Other Basic Organic Chemical Manufacturing**	\$24.92	0.0%	100.0%
Corrugated and Solid Fiber Box Manufacturing**	\$23.61	0.0%	100.0%
Paper (except Newsprint) Mills	\$21.67	89.6%	10.4%
Paper Bag and Coated and Treated Paper Manufacturing	\$20.11	61.6%	38.4%
Paperboard Mills	\$18.71	14.7%	85.3%

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

section 02

Top 15 Inputs by Dollars

Forest And Wood Products



section 02

Top Occupations

Forest And Wood Products

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Paper Goods Machine Setters, Operators, and Tenders	577	-19%	\$23.14	High school diploma or equivalent
Logging Equipment Operators	537	13%	\$21.10	High school diploma or equivalent
Helpers--Production Workers	288	-15%	\$11.46	No formal educational credential
Heavy and Tractor-Trailer Truck Drivers	284	0%	\$18.19	Postsecondary nondegree award
Laborers and Freight, Stock, and Material Movers, Hand	281	-9%	\$11.11	No formal educational credential
Industrial Truck and Tractor Operators	213	-15%	\$13.49	No formal educational credential
Team Assemblers	204	-21%	\$13.55	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	201	-15%	\$25.63	High school diploma or equivalent
Sawing Machine Setters, Operators, and Tenders, Wood	192	-9%	\$14.38	High school diploma or equivalent
Industrial Machinery Mechanics	185	-10%	\$23.85	High school diploma or equivalent
Maintenance and Repair Workers, General	125	-14%	\$15.52	High school diploma or equivalent
Carpenters	119	-16%	\$14.34	High school diploma or equivalent
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	116	-26%	\$13.17	High school diploma or equivalent
Fallers	98	2%	\$19.09	High school diploma or equivalent
First-Line Supervisors of Farming, Fishing, and Forestry Workers	98	0%	\$22.52	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2016. 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

Transportation And Logistics

Industries	Jobs 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Rail transportation	725	76	10	86	77	-9
General Freight Trucking, Long-Distance, Truckload	530	56	-5	51	52	↑ 1
Farm Product Warehousing and Storage	381	37	11	48	68	↑ 20
Specialized Freight (except Used Goods) Trucking, Local	283	25	-4	21	71	↑ 50
General Freight Trucking, Local	257	33	-6	27	-26	-53
Specialized Freight (except Used Goods) Trucking, Long-Distance	164	23	21	44	-31	-76
Couriers and Express Delivery Services	158	15	13	28	33	↑ 5
General Warehousing and Storage	155	6	18	24	107	↑ 83
Freight Transportation Arrangement	150	15	23	38	24	-13
Support Activities for Rail Transportation	99	6	18	24	51	↑ 27
Process, Physical Distribution, and Logistics Consulting Services	63	2	2	4	44	↑ 39
General Freight Trucking, Long-Distance, Less Than Truckload	61	10	4	14	-27	-42
Refrigerated Warehousing and Storage	59	0	0	0	59	↑ 58
All Other Support Activities for Transportation	55	5	18	23	13	-11
All Other Transit and Ground Passenger Transportation	47	10	98	108	-42	-150

Note: Upward arrow (↑) indicates regional competitiveness.

section 02

Shift-Share Analysis

Transportation And Logistics

Industries that Outperformed

- General Warehousing and Storage
- Refrigerated Warehousing and Storage
- Specialized Freight (except Used Goods) Trucking, Local
- Process, Physical Distribution, and Logistics Consulting Services
- Support Activities for Rail Transportation
- Farm Product Warehousing and Storage
- Couriers and Express Delivery Services
- General Freight Trucking, Long-Distance, Truckload

Industries that Underperformed

- Rail transportation
- All Other Support Activities for Transportation
- Freight Transportation Arrangement
- General Freight Trucking, Long-Distance, Less Than Truckload
- General Freight Trucking, Local
- Specialized Freight (except Used Goods) Trucking, Long-Distance
- All Other Transit and Ground Passenger Transportation

Top Industry Sectors

Transportation And Logistics

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Rail transportation	\$151.40	725	\$208,714	5.83
General Freight Trucking, Long-Distance, Truckload	\$15.72	530	\$29,673	1.25
Farm Product Warehousing and Storage	\$24.60	381	\$64,607	48.42
Specialized Freight (except Used Goods) Trucking, Local	\$20.37	283	\$71,980	2.28
General Freight Trucking, Local	\$19.68	257	\$76,422	1.12
Specialized Freight (except Used Goods) Trucking, Long-Distance	\$5.59	164	\$34,158	2.24
Couriers and Express Delivery Services	\$13.53	158	\$85,661	0.42
General Warehousing and Storage	\$5.79	155	\$37,432	0.36
Freight Transportation Arrangement	\$30.96	150	\$206,455	1.05
Support Activities for Rail Transportation	\$10.29	99	\$103,977	5.51
Process, Physical Distribution, and Logistics Consulting Services	\$2.84	63	\$45,113	0.79
General Freight Trucking, Long-Distance, Less Than Truckload	\$1.15	61	\$18,992	0.41
Refrigerated Warehousing and Storage	\$2.65	59	\$45,207	1.85
All Other Support Activities for Transportation	\$5.91	55	\$108,201	7.12
All Other Transit and Ground Passenger Transportation	\$0.85	47	\$17,942	1.23

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

section 02

Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Transportation And Logistics

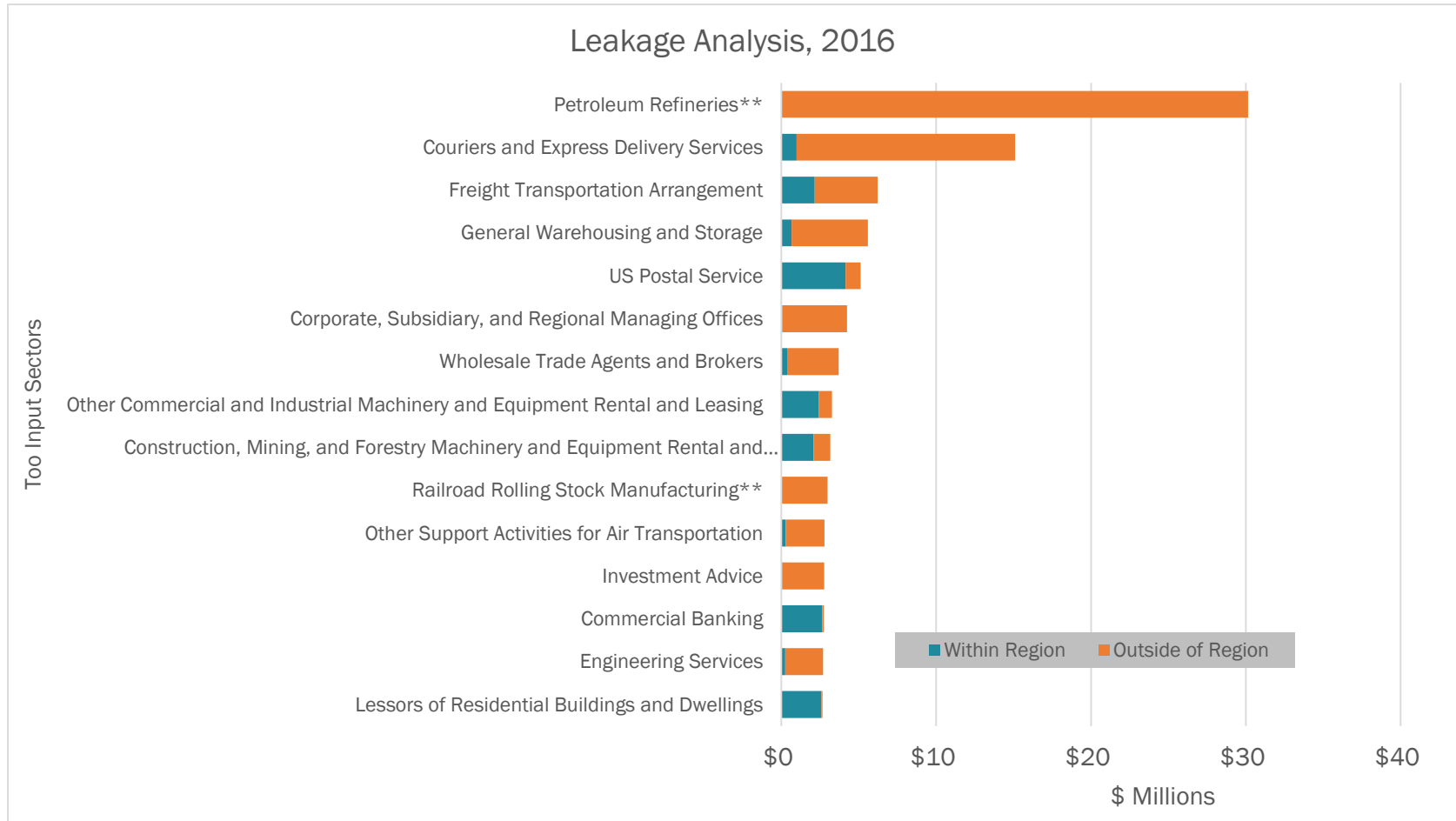
Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Petroleum Refineries**	\$30.15	0.0%	100.0%
Couriers and Express Delivery Services	\$15.10	6.5%	93.5%
Freight Transportation Arrangement	\$6.21	34.7%	65.3%
General Warehousing and Storage	\$5.58	11.8%	88.2%
US Postal Service	\$5.11	81.2%	18.8%
Corporate, Subsidiary, and Regional Managing Offices	\$4.23	1.0%	99.0%
Wholesale Trade Agents and Brokers	\$3.69	10.0%	90.0%
Other Commercial and Industrial Machinery and Equipment Rental and Leasing	\$3.26	73.7%	26.3%
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$3.15	65.7%	34.3%
Railroad Rolling Stock Manufacturing**	\$2.98	0.0%	100.0%
Other Support Activities for Air Transportation	\$2.77	9.9%	90.1%
Investment Advice	\$2.76	2.6%	97.4%
Commercial Banking	\$2.74	96.2%	3.8%
Engineering Services	\$2.69	9.0%	91.0%
Lessors of Residential Buildings and Dwellings	\$2.65	97.7%	2.3%

Note: ** 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

Source: EMSI Class of Worker 2017.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Transportation And Logistics

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	1,095	7%	\$18.19	Postsecondary nondegree award
Laborers and Freight, Stock, and Material Movers, Hand	343	41%	\$11.11	No formal educational credential
Railroad Conductors and Yardmasters	129	12%	\$21.64	High school diploma or equivalent
Locomotive Engineers	128	12%	\$22.07	High school diploma or equivalent
Light Truck or Delivery Services Drivers	119	25%	\$12.26	High school diploma or equivalent
Industrial Truck and Tractor Operators	94	68%	\$13.49	No formal educational credential
Railroad Brake, Signal, and Switch Operators	62	15%	\$22.25	High school diploma or equivalent
Cargo and Freight Agents	58	16%	\$24.01	High school diploma or equivalent
Office Clerks, General	57	24%	\$11.29	High school diploma or equivalent
Packers and Packers, Hand	57	43%	\$10.63	No formal educational credential
Dispatchers, Except Police, Fire, and Ambulance	55	10%	\$17.10	High school diploma or equivalent
Managers, All Other	54	10%	\$16.27	Bachelor's degree
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	53	18%	\$21.41	High school diploma or equivalent
Transportation, Storage, and Distribution Managers	46	18%	\$37.90	High school diploma or equivalent
Rail Car Repairers	43	10%	\$26.63	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2016. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

03 Cluster Comparisons

**Agribusiness, Food Processing
And Technology**

Chemicals

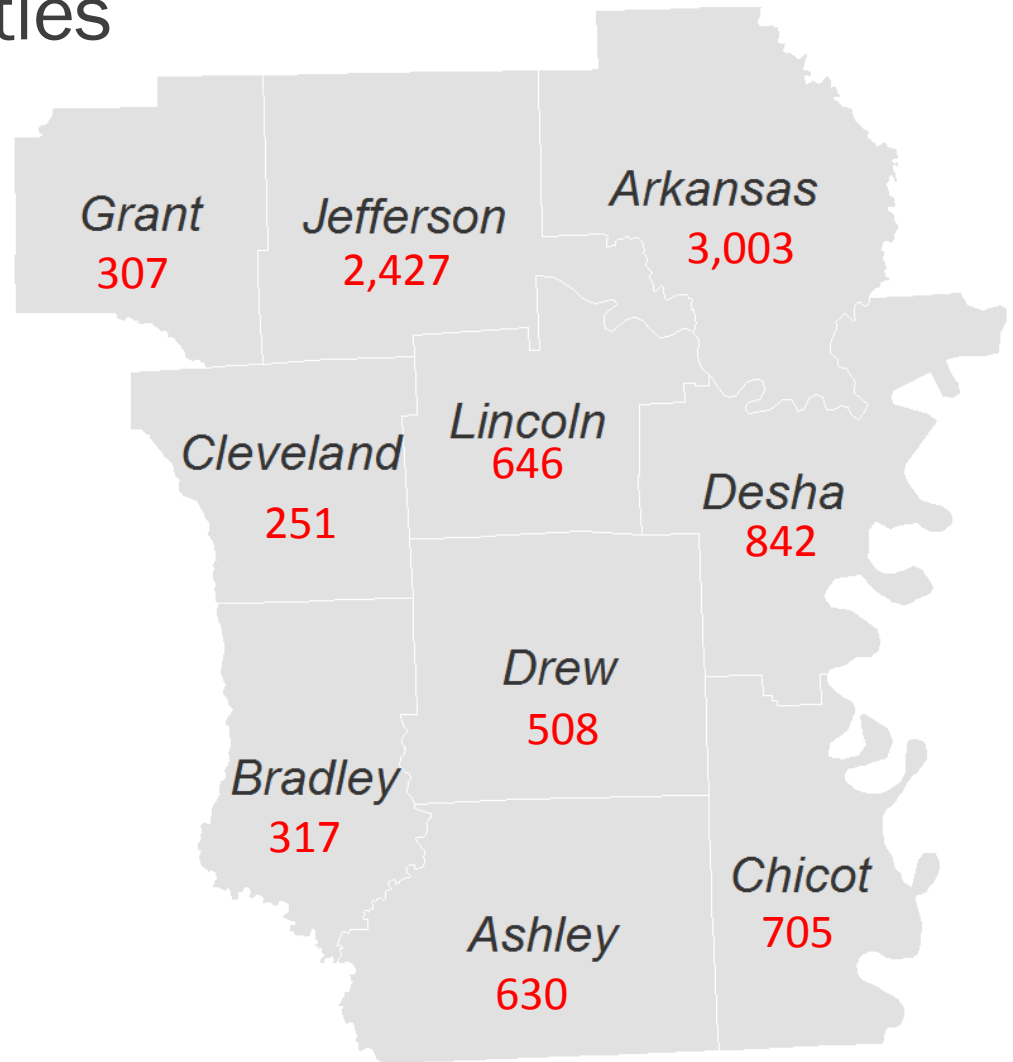
**Arts, Entertainment,
Recreation And Visitor
Industries**

Forest And Wood Products

Transportation And Logistics

Agribusiness, Food Processing and Technology

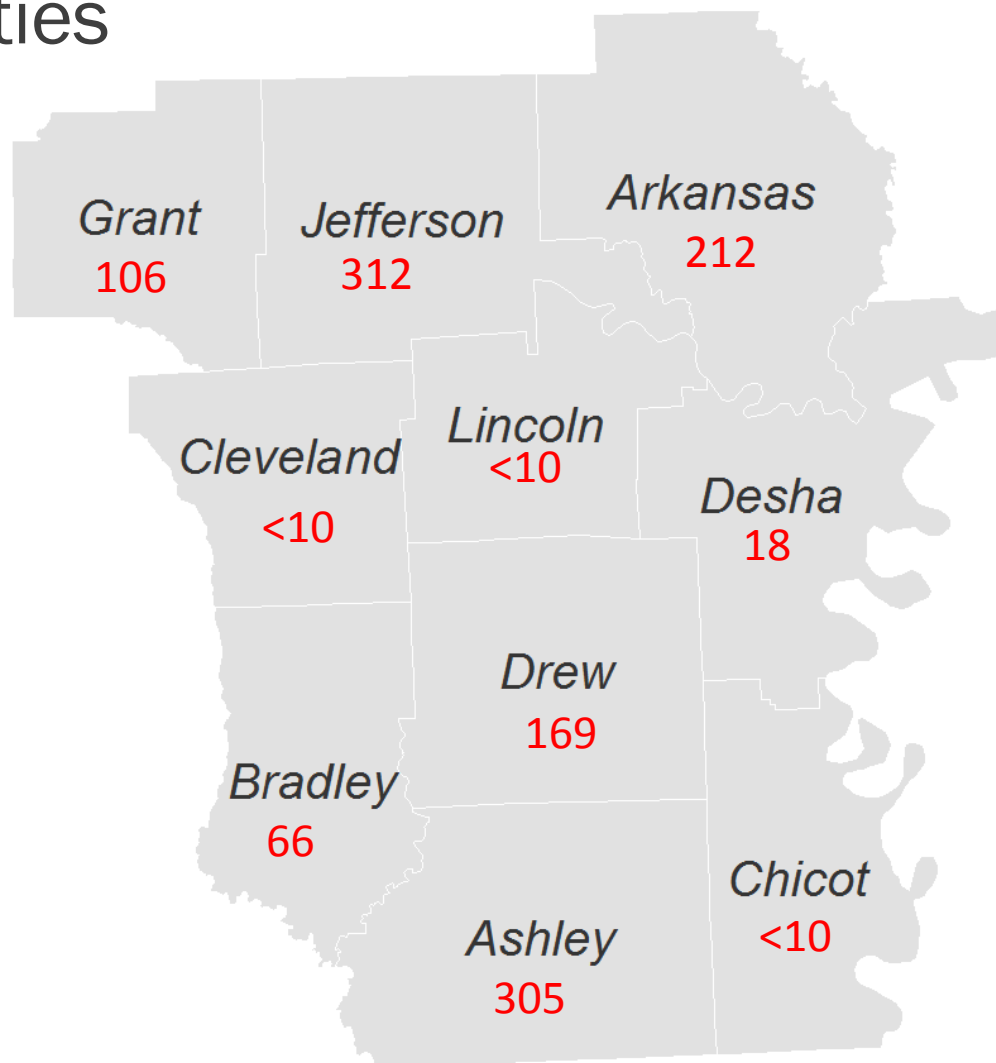
Contribution by Counties (Jobs, 2016)



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Chemicals

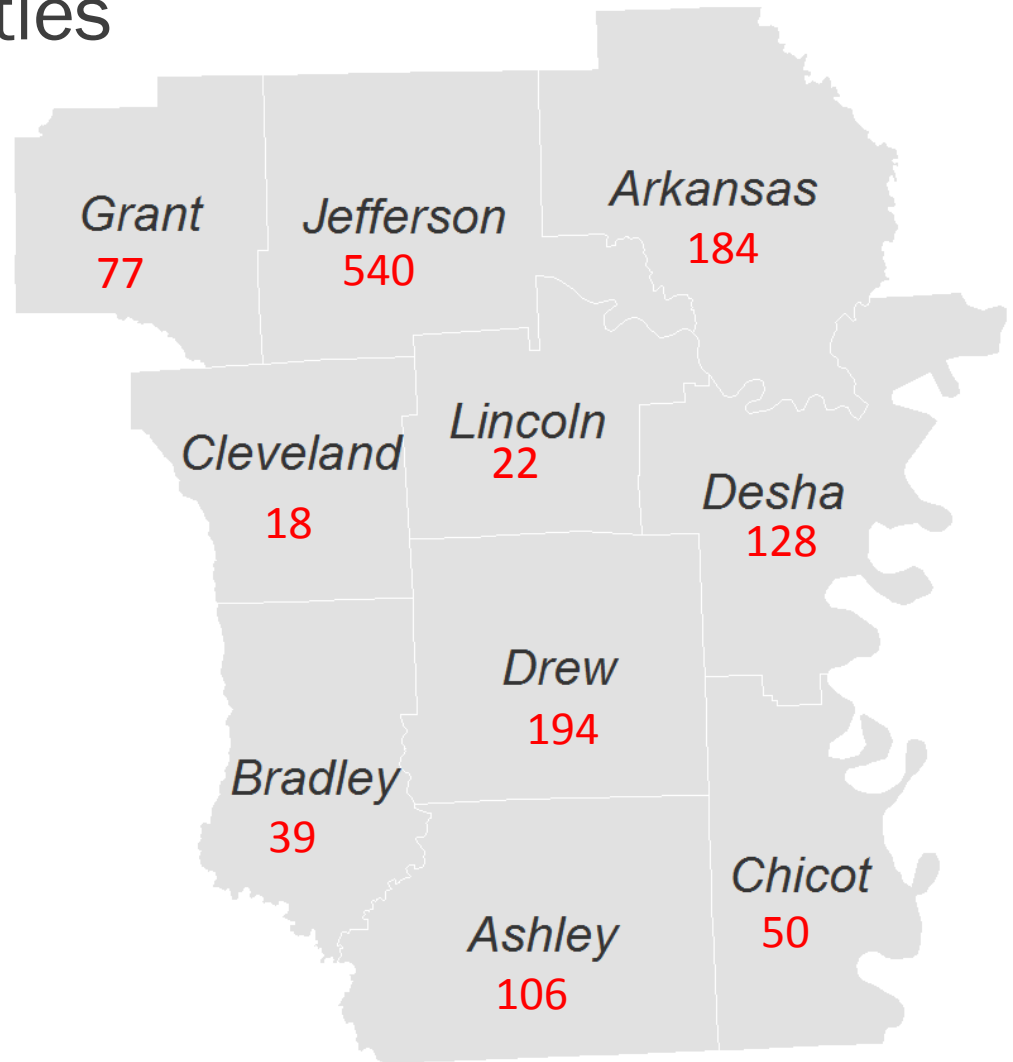
Contribution by Counties (Jobs, 2016)



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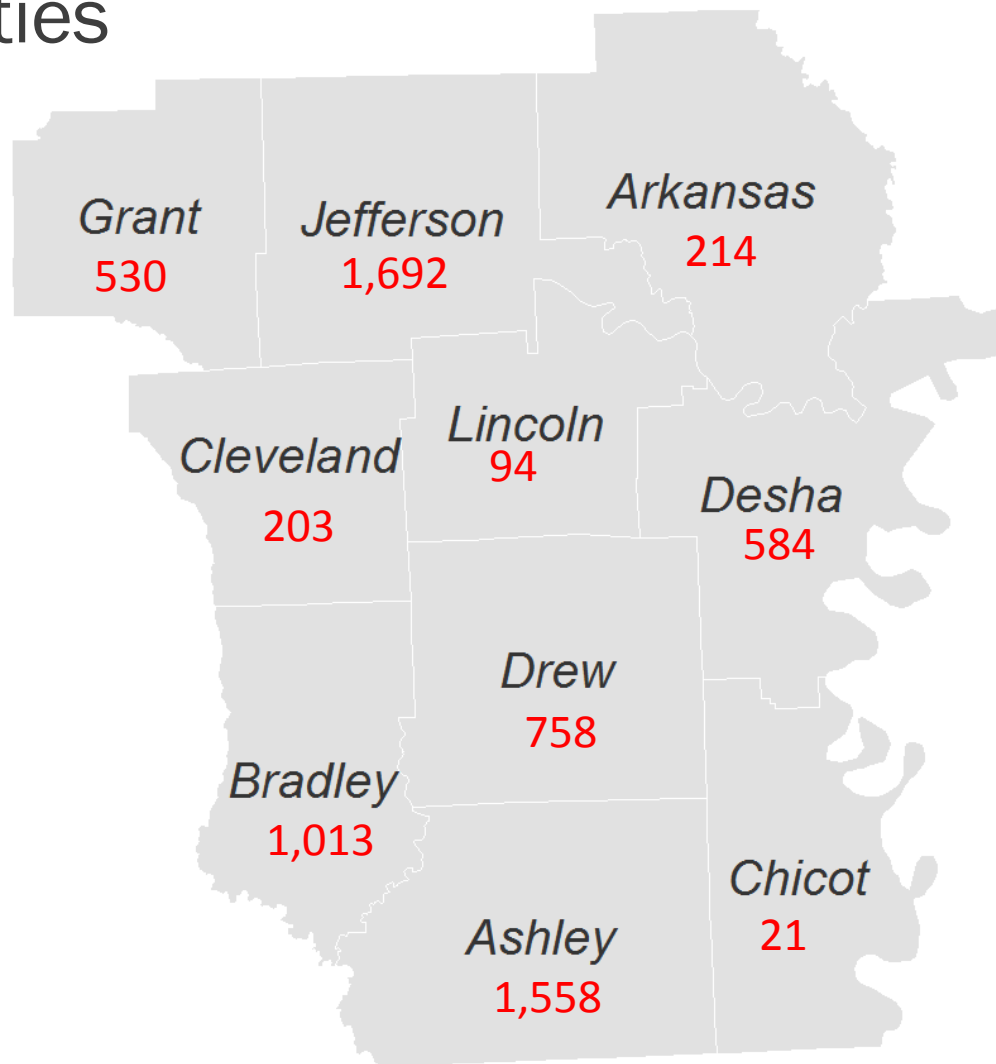
Arts, Entertainment, Recreation And Visitor Industries

Contribution by Counties (Jobs, 2016)



Forest And Wood Products

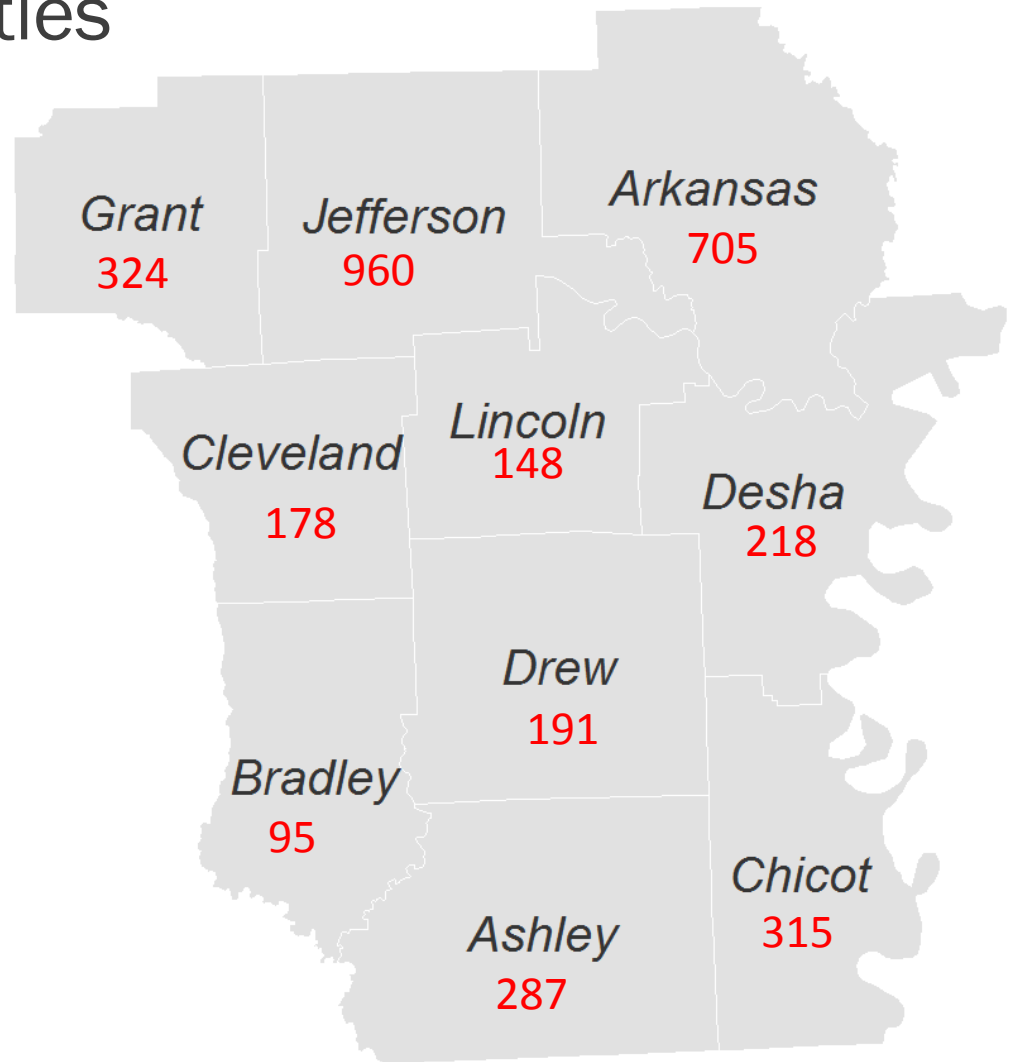
Contribution by Counties (Jobs, 2016)



section 03

Transportation And Logistics

Contribution by Counties (Jobs, 2016)



section 03

Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology	Chemicals	Arts, Entertainment, Recreation And Visitor Industries	Forest And Wood Products	Transportation And Logistics
Regional Performance, 2010-2016 (Shift-share analysis)	-464 (negative value)	+194 (positive value)	-49 (negative value)	-757 (negative value)	-99 (negative value)
Export value, 2016	\$2,471,024,389	\$548,393,636	\$14,819,715	\$2,274,431,093	\$326,432,270
Leakage, 2016	\$1,544,576,507	\$259,878,086	\$20,266,139	\$1,002,963,810	\$176,151,794
Number of establishments, 2016	392	47	114	245	230
Contribution by counties	10	10	10	10	10
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				

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Report Contributors

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



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