



Regional Data Snapshot

Target Industry Clusters

SET session 2

Southeastern New Mexico Region, New Mexico

Table of contents

01

Overview

02

Target Industry Clusters

03

Industry Cluster Comparison

01 overview

Chaves County, NM

Curry County, NM

Eddy County, NM

Lea County, NM

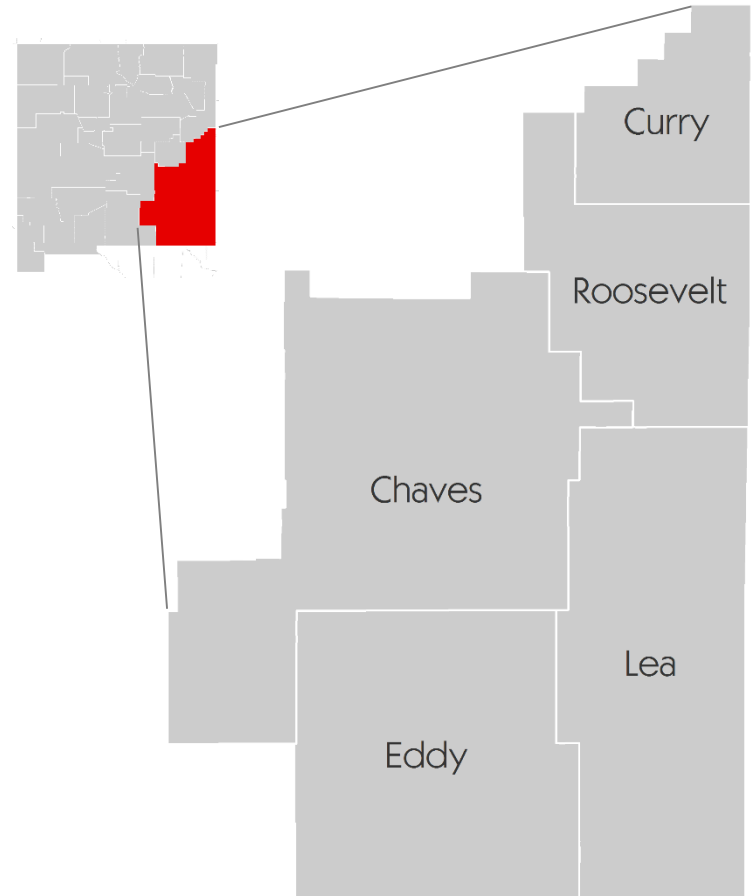
Roosevelt County, NM

Overview

Southeastern New Mexico, NM

The Southeastern New Mexico Region is comprised of 5 New Mexico counties. State Highway 285 connects the region to I-40, further connecting to Albuquerque to the northwest, and I-20 to the south. U.S. Highway 70 and 60 connect the region to Amarillo, Texas. Major railroads include BNSF and SW, and TNMR, a regional railroad. Major regional airports include Roswell and Lea County regional airports.

- Chaves
- Curry
- Eddy
- Lea
- Roosevelt



02 target industry clusters

**Agribusiness, Food Processing
and Technology**

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

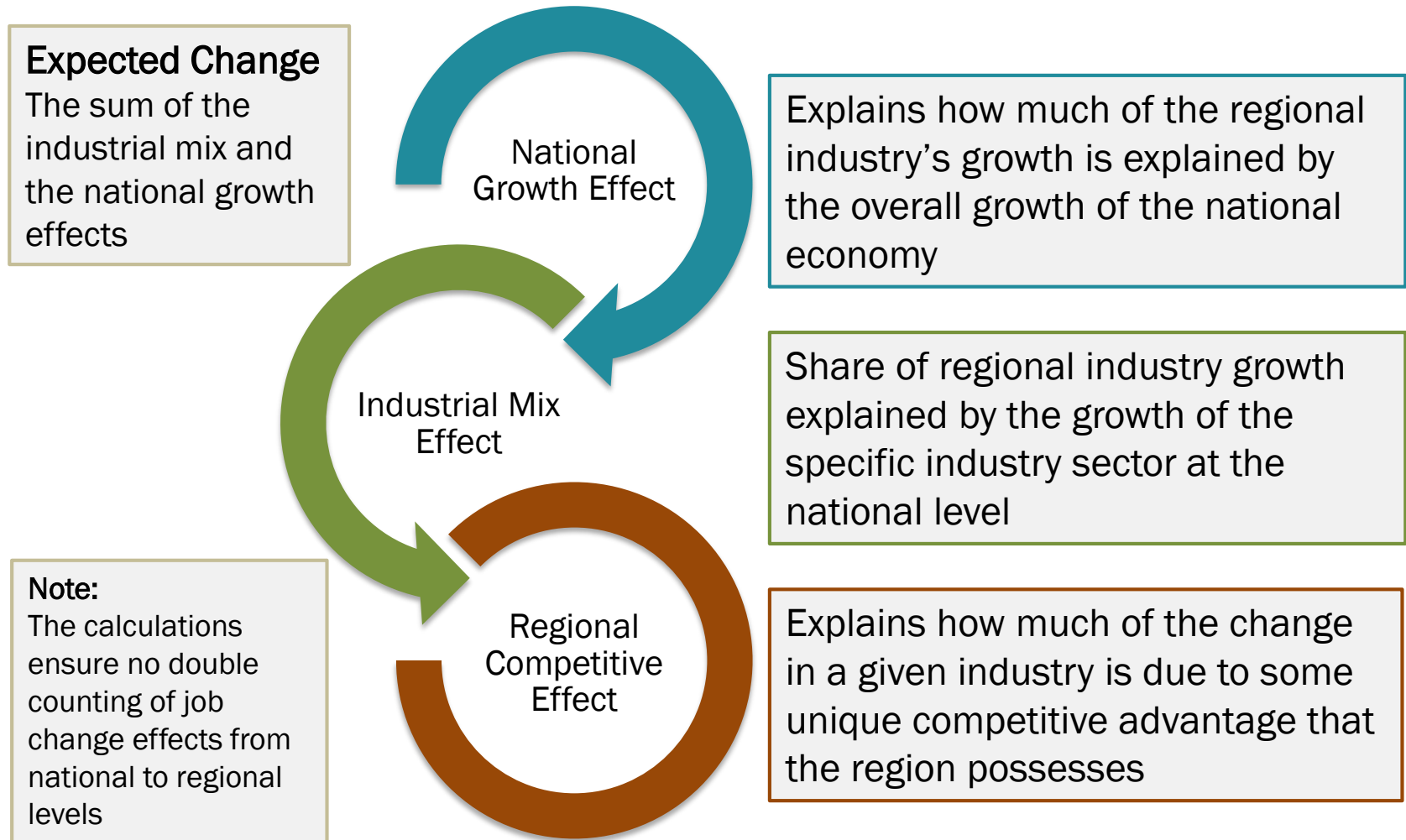
Defense and Security

Energy

Transportation and Logistics.

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



Source: EMSI Website, <http://www.economicmodeling.com/2011/12/05/understanding-shift-share-2/>

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
Animal Production and Aquaculture	5,689	651	-666	-15	125	↑ 140
Cheese Manufacturing	1,108	99	10	109	264	↑ 155
Crop Production	1,013	112	-102	10	60	↑ 50
Farm Labor Contractors and Crew Leaders	359	30	10	40	101	↑ 61
Livestock Merchant Wholesalers	165	21	-19	2	-15	-17
Farm Supplies Merchant Wholesalers	142	16	-2	14	6	-8
Frozen Specialty Food Manufacturing	140	27	-18	9	-91	-100
Roasted Nuts and Peanut Butter Manufacturing	134	24	29	53	-72	-124
Farm and Garden Machinery and Equipment Merchant Wholesalers	129	13	-6	7	19	↑ 12
Soil Preparation, Planting, and Cultivating	116	14	13	27	-3	-30
Other Animal Food Manufacturing	89	13	-1	12	-21	-33
Spice and Extract Manufacturing	81	12	10	22	-21	-43
Postharvest Crop Activities (except Cotton Ginning)	77	5	1	6	36	↑ 30
Perishable Prepared Food Manufacturing	75	3	8	11	53	↑ 42
Grain and Field Bean Merchant Wholesalers	49	5	0	5	10	↑ 7

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- 
- Cheese Manufacturing
 - Animal Production and Aquaculture
 - Farm Labor Contractors and Crew Leaders
 - Crop Production
 - Perishable Prepared Food Manufacturing
 - Postharvest Crop Activities (except Cotton Ginning)
 - Farm and Garden Machinery and Equipment Merchant Wholesalers
 - Grain and Field Bean Merchant Wholesalers

Industries that Underperformed

- 
- Farm Supplies Merchant Wholesalers
 - Livestock Merchant Wholesalers
 - Soil Preparation, Planting, and Cultivating
 - Other Animal Food Manufacturing
 - Spice and Extract Manufacturing
 - Frozen Specialty Food Manufacturing
 - Roasted Nuts and Peanut Butter Manufacturing

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Animal Production and Aquaculture	799.62	5,689	140,556	7.01
Cheese Manufacturing	1,130.44	1,108	1,020,500	33.75
Crop Production	91.85	1,013	90,679	0.97
Farm Labor Contractors and Crew Leaders	7.38	359	20,560	1.56
Livestock Merchant Wholesalers	10.28	165	62,425	11.28
Farm Supplies Merchant Wholesalers	11.59	142	81,781	1.65
Frozen Specialty Food Manufacturing	30.70	140	219,198	3.37
Roasted Nuts and Peanut Butter Manufacturing	55.00	134	409,207	11.50
Farm and Garden Machinery and Equipment Merchant Wholesalers	13.07	129	101,385	1.74
Soil Preparation, Planting, and Cultivating	0.47	116	4,084	1.99
Other Animal Food Manufacturing	84.98	89	951,345	3.53
Spice and Extract Manufacturing	43.69	81	540,713	4.50
Postharvest Crop Activities (except Cotton Ginning)	0.24	77	3,101	1.07
Perishable Prepared Food Manufacturing	8.23	75	110,317	1.97
Grain and Field Bean Merchant Wholesalers	3.22	49	65,457	1.27

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

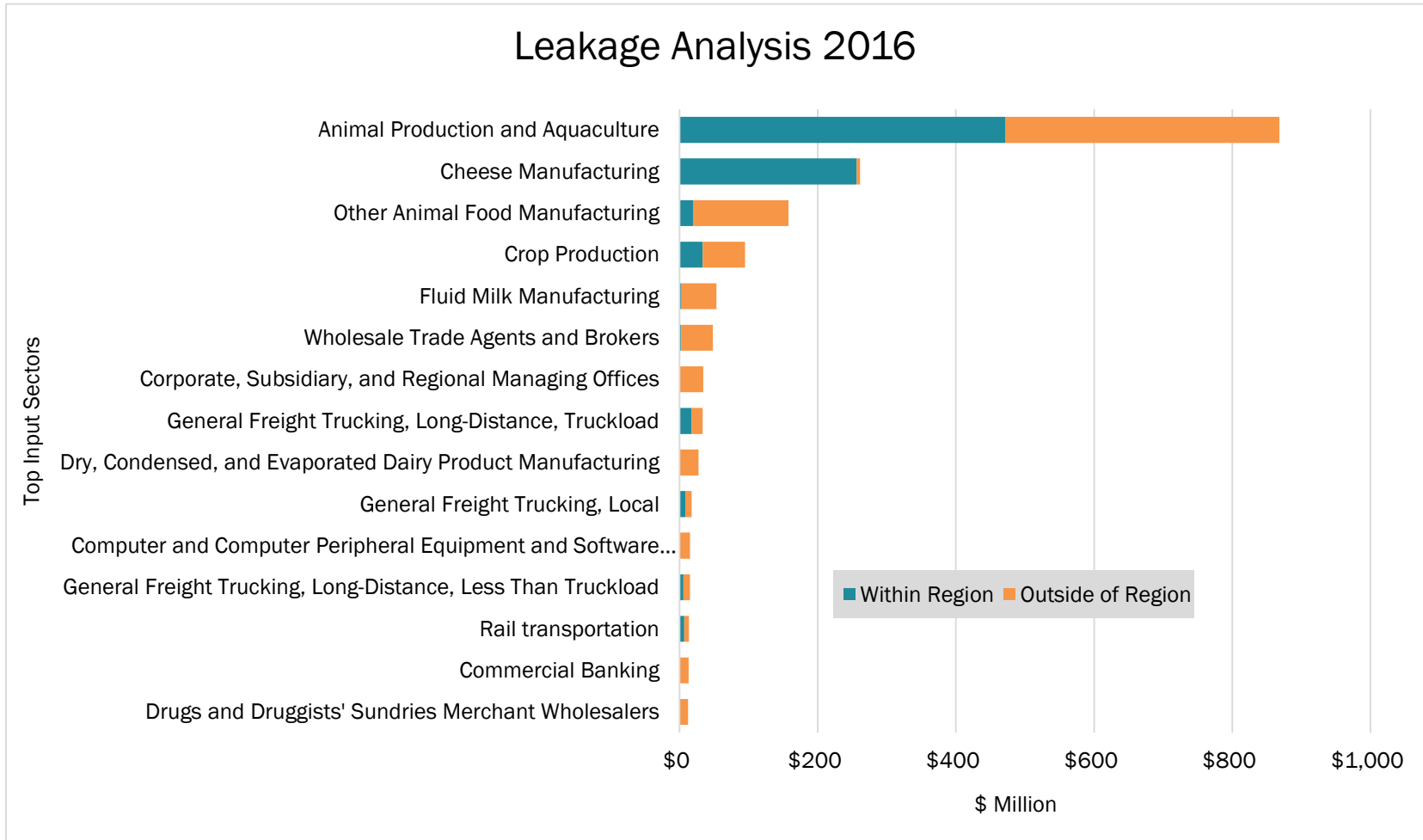
Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Animal Production and Aquaculture	\$867.99	54.3%	45.7%
Cheese Manufacturing	\$261.11	98.3%	1.7%
Other Animal Food Manufacturing	\$157.88	12.4%	87.6%
Crop Production	\$94.80	35.5%	64.5%
Fluid Milk Manufacturing	\$53.44	5.0%	95.0%
Wholesale Trade Agents and Brokers	\$48.38	5.2%	94.8%
Corporate, Subsidiary, and Regional Managing Offices	\$34.17	2.2%	97.8%
General Freight Trucking, Long-Distance, Truckload	\$33.44	52.7%	47.3%
Dry, Condensed, and Evaporated Dairy Product Manufacturing	\$27.51	1.3%	98.7%
General Freight Trucking, Local	\$17.40	49.0%	51.0%
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$15.29	0.5%	99.5%
General Freight Trucking, Long-Distance, Less Than Truckload	\$15.12	37.9%	62.1%
Rail transportation	\$13.71	51.1%	48.9%
Commercial Banking	\$13.40	2.7%	97.3%
Drugs and Druggists' Sundries Merchant Wholesalers	\$12.28	2.0%	98.0%

Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology



Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2016	% Change, 2010-2016	Median Hour Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,634	-5%	\$11.19	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	2,471	12%	\$15.20	No formal educational credential
Food Batchmakers	331	7%	\$16.01	High school diploma or equivalent
Farmworkers, Farm, Ranch, and Aquacultural Animals	294	7%	\$15.08	No formal educational credential
Agricultural Equipment Operators	245	17%	\$20.72	No formal educational credential
Heavy and Tractor-Trailer Truck Drivers	188	11%	\$19.74	Postsecondary nondegree award
Packaging and Filling Machine Operators and Tenders	176	-1%	\$10.90	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	160	3%	\$12.55	No formal educational credential
Nonfarm Animal Caretakers	125	5%	\$9.86	High school diploma or equivalent
First-Line Supervisors of Farming, Fishing, and Forestry Workers	124	3%	\$29.75	High school diploma or equivalent
Packers and Packers, Hand	120	3%	\$9.14	No formal educational credential
Animal Trainers	109	-9%	\$10.84	High school diploma or equivalent
Maintenance and Repair Workers, General	104	8%	\$15.70	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	98	2%	\$27.89	High school diploma or equivalent
Farm Equipment Mechanics and Service Technicians	89	25%	\$19.55	High school diploma or equivalent

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	1,493	137	26	163	323	↑ 160
Casino Hotels	251	0	0	0	251	↑ 251
Fitness and Recreational Sports Centers	211	22	18	40	21	-19
Independent Artists, Writers, and Performers	201	25	5	30	-15	-45
Radio Stations	140	18	-22	-4	-17	-13
Golf Courses and Country Clubs	123	11	-3	8	25	↑ 17
Motion Picture Theaters (except Drive-Ins)	115	8	-1	7	47	↑ 40
Other Spectator Sports	112	9	-4	5	35	↑ 30
RV (Recreational Vehicle) Parks and Campgrounds	110	5	5	10	67	↑ 57
All Other Amusement and Recreation Industries	82	6	12	18	29	↑ 11
Musical Groups and Artists	59	5	13	18	13	-5
Racetracks	44	6	-9	-3	-5	-2
Bowling Centers	42	6	-7	-1	-6	-6
Sporting and Recreational Goods and Supplies Merchant Wholesalers	33	1	3	4	Insf. Data	↑ 20
Recreational and Vacation Camps (except Campgrounds)	21	1	1	2	Insf. Data	↑ 13

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Arts, Entertainment, Recreation and Visitor Industries

Industries that Outperformed

- 
- Casino Hotels
 - Hotels (except Casino Hotels) and Motels
 - RV (Recreational Vehicle) Parks and Campgrounds
 - Motion Picture Theaters (except Drive-Ins)
 - Other Spectator Sports
 - Sporting and Recreational Goods and Supplies Merchant Wholesalers
 - Golf Courses and Country Clubs
 - Recreational and Vacation Camps (except Campgrounds)
 - All Other Amusement and Recreation Industries

Industries that Underperformed

- 
- Racetracks
 - Musical Groups and Artists
 - Bowling Centers
 - Radio Stations
 - Fitness and Recreational Sports Centers
 - Independent Artists, Writers, and Performers

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	\$121.8	1,493	\$81,615	1.26
Casino Hotels	\$23.7	251	\$94,189	1.35
Fitness and Recreational Sports Centers	\$0.6	211	\$2,777	0.39
Independent Artists, Writers, and Performers	\$1.4	201	\$7,142	0.23
Radio Stations	\$26.0	140	\$185,680	2.09
Golf Courses and Country Clubs	\$0.2	123	\$1,709	0.43
Motion Picture Theaters (except Drive-Ins)	\$6.6	115	\$57,120	1.15
Other Spectator Sports	\$0.0	112	\$383	0.85
RV (Recreational Vehicle) Parks and Campgrounds	\$4.9	110	\$44,810	3.50
All Other Amusement and Recreation Industries	\$0.0	82	\$234	0.38
Musical Groups and Artists	\$0.6	59	\$10,938	0.72
Racetracks	\$0.0	44	\$185	0.94
Bowling Centers	\$1.4	42	\$34,313	0.77
Sporting and Recreational Goods and Supplies Merchant Wholesalers	\$1.6	33	\$47,891	0.54
Recreational and Vacation Camps (except Campgrounds)	\$0.2	21	\$10,590	0.71

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

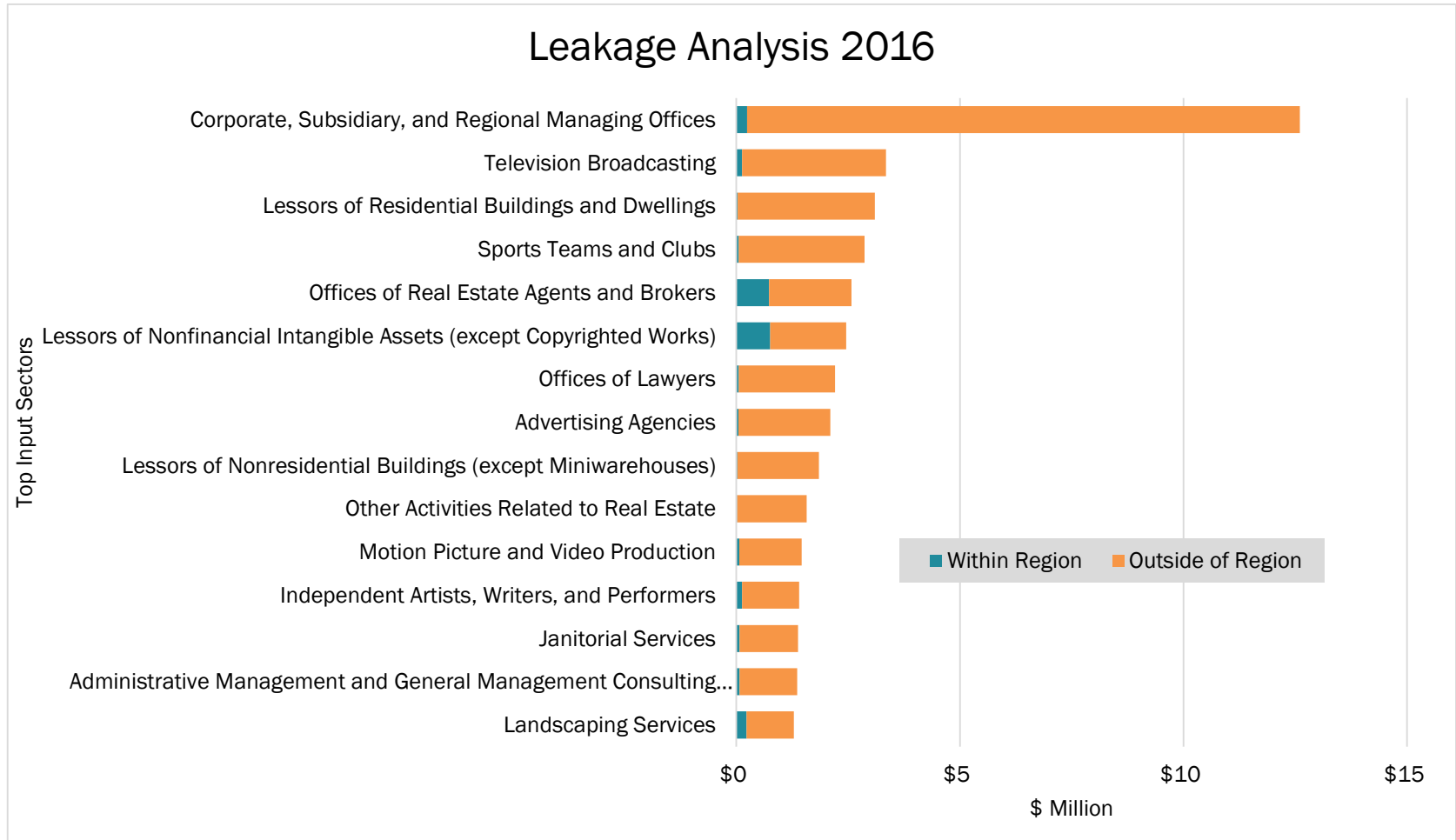
Top 15 Inputs by Dollars

Arts, Entertainment, Recreation and Visitor Industries

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$12.60	1.9%	98.1%
Television Broadcasting	\$3.35	3.8%	96.2%
Lessors of Residential Buildings and Dwellings	\$3.10	1.1%	98.9%
Sports Teams and Clubs	\$2.87	1.9%	98.1%
Offices of Real Estate Agents and Brokers	\$2.58	28.4%	71.6%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$2.45	30.8%	69.2%
Offices of Lawyers	\$2.21	2.4%	97.6%
Advertising Agencies	\$2.10	2.5%	97.5%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$1.85	1.5%	98.5%
Other Activities Related to Real Estate	\$1.58	1.0%	99.0%
Motion Picture and Video Production	\$1.46	4.7%	95.3%
Independent Artists, Writers, and Performers	\$1.40	9.2%	90.8%
Janitorial Services	\$1.38	5.3%	94.7%
Administrative Management and General Management Consulting Services	\$1.36	5.5%	94.5%
Landscaping Services	\$1.29	17.7%	82.3%

Top 15 Inputs by Dollars

Arts, Entertainment, Recreation and Visitor Industries



Top Occupations

Arts, Entertainment, Recreation and Visitor Industries

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Maids and Housekeeping Cleaners	523	29%	\$9.82	No formal educational credential
Hotel, Motel, and Resort Desk Clerks	344	30%	\$9.56	High school diploma or equivalent
Lodging Managers	120	71%	\$20.58	High school diploma or equivalent
Musicians and Singers	101	15%	\$13.10	No formal educational credential
Waiters and Waitresses	92	3%	\$9.05	No formal educational credential
Gaming Dealers	90	143%	\$8.54	High school diploma or equivalent
Writers and Authors	85	16%	\$13.17	Bachelor's degree
Fitness Trainers and Aerobics Instructors	81	19%	\$14.42	High school diploma or equivalent
Maintenance and Repair Workers, General	74	21%	\$15.70	High school diploma or equivalent
Food Servers, Nonrestaurant	66	18%	\$8.98	No formal educational credential
Landscaping and Groundskeeping Workers	57	36%	\$9.44	No formal educational credential
Radio and Television Announcers	54	-10%	\$15.05	Bachelor's degree
Cooks, Restaurant	50	28%	\$9.80	No formal educational credential
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	47	9%	\$10.76	No formal educational credential
Managers, All Other	44	144%	\$18.37	Bachelor's degree

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

Defense And Security

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
Federal Government, Military	5,129	495	-736	-241	894	↑ 1,134
Power and Communication Line and Related Structures Construction	291	19	31	50	130	↑ 79
Other Personal and Household Goods Repair and Maintenance	153	20	-3	17	-16	-32
Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	124	3	-2	1	100	↑ 99
Security Guards and Patrol Services	81	12	5	17	-24	-42
Automobile and Other Motor Vehicle Merchant Wholesalers	69	0	0	0	Insf. Data	↑ 65
Computer Systems Design Services	68	8	13	21	3	-17
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	38	9	-4	5	-38	-43
Motor Vehicle Supplies and New Parts Merchant Wholesalers	36	4	1	5	4	0
Computer Facilities Management Services	32	1	1	2	Insf. Data	↑ 23
Investigation Services	30	2	-2	0	13	↑ 13
Security Systems Services (except Locksmiths)	28	6	8	14	-26	-40
Custom Computer Programming Services	23	7	11	18	-37	-54
Locksmiths	20	4	1	5	-16	-20
Surgical Appliance and Supplies Manufacturing	12	0	0	0	Insf. Data	↑ 11

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Defense And Security

Industries that Outperformed

- Federal Government, Military
- Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers
- Power and Communication Line and Related Structures Construction
- Automobile and Other Motor Vehicle Merchant Wholesalers*
- Computer Facilities Management Services
- Investigation Services
- Surgical Appliance and Supplies Manufacturing

Industries that Underperformed

- Computer Systems Design Services
- Locksmiths
- Other Personal and Household Goods Repair and Maintenance
- Security Systems Services (except Locksmiths)
- Security Guards and Patrol Services
- Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)
- Custom Computer Programming Services
- Motor Vehicle Supplies and New Parts Merchant Wholesalers

Note: Motor Vehicle Supplies and New Parts Merchant Wholesale industry has zero competitive effect.

Top Industry Sectors

Defense And Security

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Federal Government, Military	2,602	5,129	507,267	3.70
Power and Communication Line and Related Structures Construction	52	291	178,063	2.20
Other Personal and Household Goods Repair and Maintenance	1	153	4,783	0.65
Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	18	124	142,431	5.17
Security Guards and Patrol Services	2	81	24,090	0.16
Automobile and Other Motor Vehicle Merchant Wholesalers	12	69	170,967	0.77
Computer Systems Design Services	1	68	19,655	0.09
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	1	38	21,571	0.11
Motor Vehicle Supplies and New Parts Merchant Wholesalers	5	36	136,502	0.28
Computer Facilities Management Services	2	32	49,494	0.55
Investigation Services	1	30	37,943	0.57
Security Systems Services (except Locksmiths)	0.2	28	6,182	0.23
Custom Computer Programming Services	0.5	23	21,240	0.03
Locksmiths	0.1	20	4,959	0.54
Surgical Appliance and Supplies Manufacturing	7	12	581,879	0.17

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

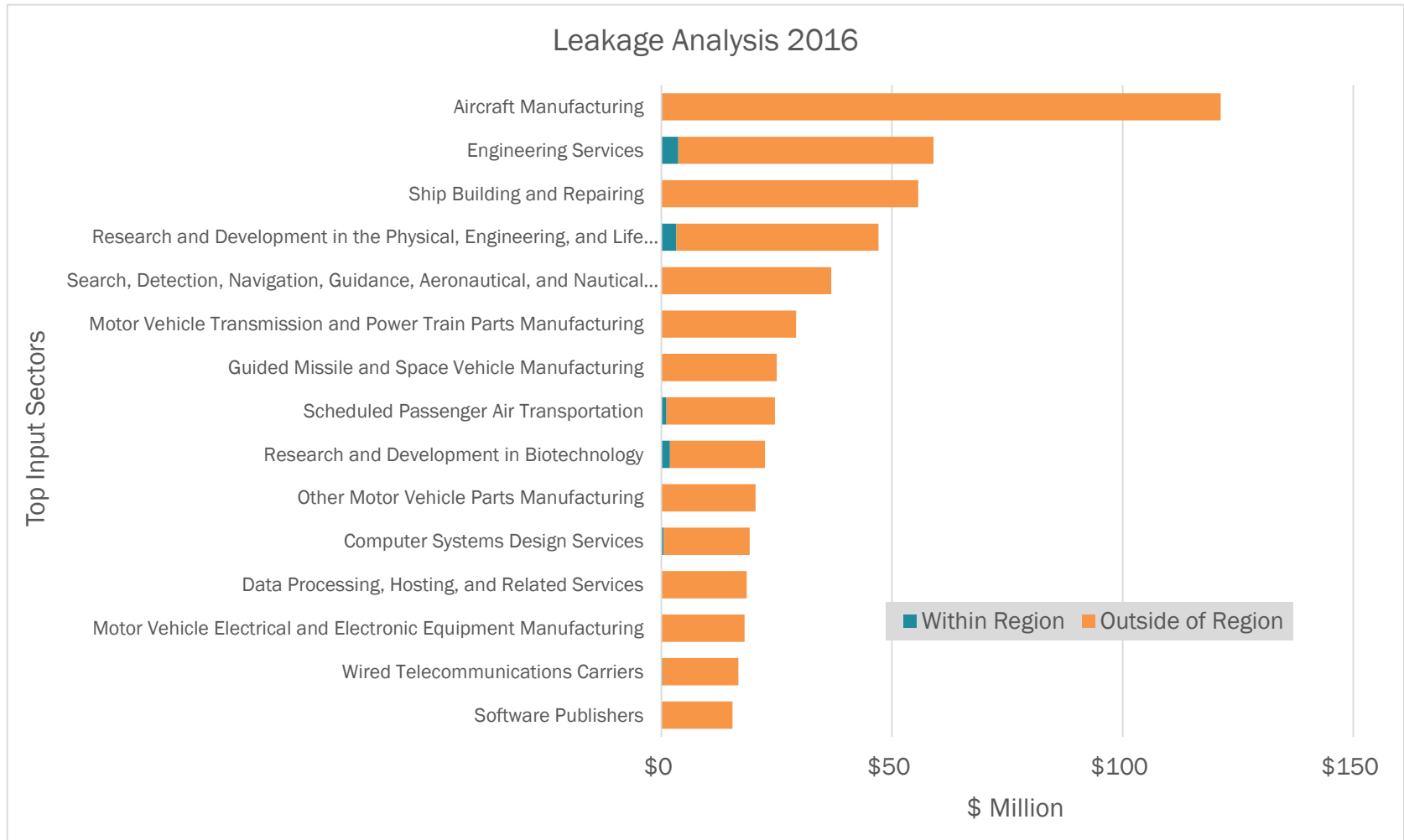
Top 15 Inputs by Dollars

Defense And Security

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Aircraft Manufacturing	\$121.27	0.1%	99.9%
Engineering Services	\$58.99	6.2%	93.8%
Ship Building and Repairing	\$55.71	0.0%	100.0%
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	\$47.06	6.9%	93.1%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$36.81	0.0%	100.0%
Motor Vehicle Transmission and Power Train Parts Manufacturing	\$29.18	0.0%	100.0%
Guided Missile and Space Vehicle Manufacturing	\$24.99	0.0%	100.0%
Scheduled Passenger Air Transportation	\$24.63	4.5%	95.5%
Research and Development in Biotechnology	\$22.48	8.3%	91.7%
Other Motor Vehicle Parts Manufacturing	\$20.40	0.4%	99.6%
Computer Systems Design Services	\$19.14	2.7%	97.3%
Data Processing, Hosting, and Related Services	\$18.49	0.8%	99.2%
Motor Vehicle Electrical and Electronic Equipment Manufacturing	\$18.06	0.0%	100.0%
Wired Telecommunications Carriers	\$16.70	1.3%	98.7%
Software Publishers	\$15.44	0.0%	100.0%

Top 15 Inputs by Dollars

Defense And Security



Top Occupations

Defense And Security

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Military occupations	5,129	21%	\$17.17	N/A
Security Guards	77	-15%	\$13.85	High school diploma or equivalent
Construction Laborers	74	106%	\$13.76	No formal educational credential
Electrical Power-Line Installers and Repairers	44	63%	\$32.24	High school diploma or equivalent
Tailors, Dressmakers, and Custom Sewers	33	-21%	\$11.80	No formal educational credential
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	28	155%	\$23.37	High school diploma or equivalent
General and Operations Managers	26	53%	\$27.44	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	26	30%	\$14.79	High school diploma or equivalent
Operating Engineers and Other Construction Equipment Operators	25	92%	\$20.56	High school diploma or equivalent
Private Detectives and Investigators	21	11%	\$17.83	High school diploma or equivalent
First-Line Supervisors of Construction Trades and Extraction Workers	19	90%	\$27.71	High school diploma or equivalent
Managers, All Other	18	-5%	\$18.37	Bachelor's degree
Telecommunications Line Installers and Repairers	18	50%	\$17.58	High school diploma or equivalent
Office Clerks, General	17	42%	\$11.49	High school diploma or equivalent
First-Line Supervisors of Non-Retail Sales Workers	17	6%	\$14.77	High school diploma or equivalent

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

Energy


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
Crude Petroleum and Natural Gas Extraction	8,554	873	925	1,798	1,091	-708
Support Activities for Oil and Gas Operations	7,712	665	-244	421	2,030	↑ 1,609
Oil and Gas Pipeline and Related Structures Construction	994	92	221	313	211	-101
Electrical Contractors and Other Wiring Installation Contractors	974	122	70	192	-65	-256
Gasoline Stations with Convenience Stores	960	90	9	99	191	↑ 92
Drilling Oil and Gas Wells	741	132	-507	-375	-386	-10
Natural Gas Liquid Extraction	716	37	151	188	400	↑ 212
Plumbing, Heating, and Air-Conditioning Contractors	656	80	89	169	-29	-198
Petroleum Refineries	584	44	-62	-18	210	↑ 228
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	429	58	-32	26	-64	-90
Electric Power Distribution	407	44	-32	12	32	↑ 19
Engineering Services	329	52	-24	28	-119	-146
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	305	29	-20	9	60	↑ 52
Power and Communication Line and Related Structures Construction	291	19	31	50	130	↑ 79
Natural Gas Distribution	226	23	-16	7	27	↑ 19

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Energy

Industries that Outperformed

- 
- A large, light blue upward-pointing arrow graphic is positioned behind the list of industries that outperformed.
- Support Activities for Oil and Gas Operations
 - Petroleum Refineries
 - Natural Gas Liquid Extraction
 - Gasoline Stations with Convenience Stores
 - Power and Communication Line and Related Structures Construction
 - Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
 - Natural Gas Distribution
 - Electric Power Distribution

Industries that Underperformed

- 
- A large, light red downward-pointing arrow graphic is positioned behind the list of industries that underperformed.
- Drilling Oil and Gas Wells
 - Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing
 - Oil and Gas Pipeline and Related Structures Construction
 - Engineering Services
 - Plumbing, Heating, and Air-Conditioning Contractors
 - Electrical Contractors and Other Wiring Installation Contractors
 - Crude Petroleum and Natural Gas Extraction

Top Industry Sectors

Energy

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Crude Petroleum and Natural Gas Extraction	1,273.7	8,554	148,910	14.6
Support Activities for Oil and Gas Operations	1,098.1	7,712	142,388	44.6
Oil and Gas Pipeline and Related Structures Construction	197.0	994	198,184	10.4
Electrical Contractors and Other Wiring Installation Contractors	62.1	974	63,729	1.3
Gasoline Stations with Convenience Stores	41.5	960	43,211	1.6
Drilling Oil and Gas Wells	133.9	741	180,742	19.4
Natural Gas Liquid Extraction	148.1	716	206,743	33.8
Plumbing, Heating, and Air-Conditioning Contractors	59.4	656	90,486	0.7
Petroleum Refineries	2,936.0	584	5,028,753	12.0
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	165.9	429	386,968	7.3
Electric Power Distribution	174.4	407	428,706	2.7
Engineering Services	8.3	329	25,140	0.4
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	67.3	305	220,584	6.7
Power and Communication Line and Related Structures Construction	51.7	291	178,063	2.2
Natural Gas Distribution	114.8	226	508,188	2.8

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

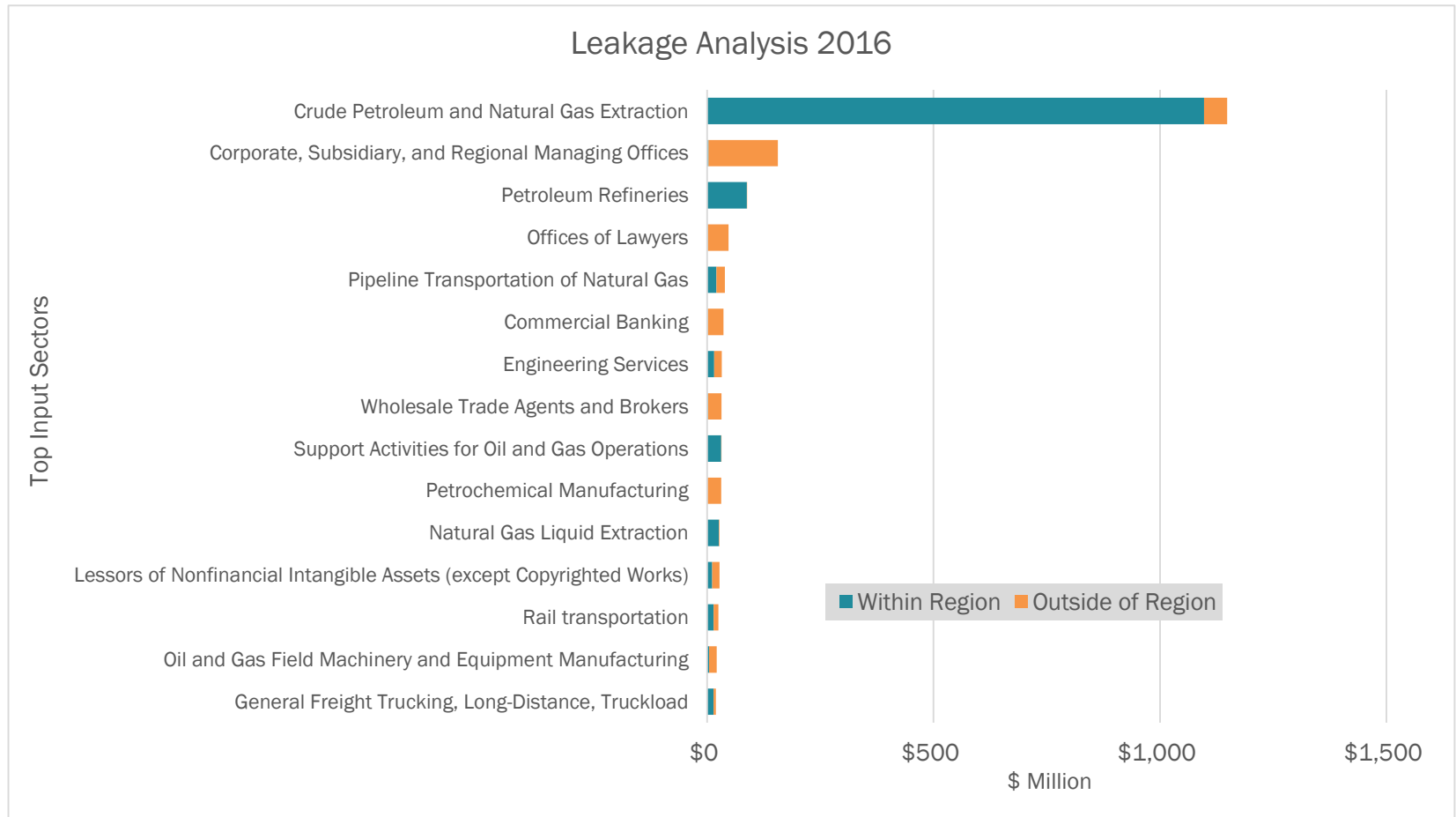
Top 15 Inputs by Dollars

Energy

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Crude Petroleum and Natural Gas Extraction	\$1,148.5	95.5%	4.5%
Corporate, Subsidiary, and Regional Managing Offices	\$156.2	2.0%	98.0%
Petroleum Refineries	\$88.2	99.5%	0.5%
Offices of Lawyers	\$47.5	2.3%	97.7%
Pipeline Transportation of Natural Gas	\$39.2	52.1%	47.9%
Commercial Banking	\$35.9	2.9%	97.1%
Engineering Services	\$32.7	46.8%	53.2%
Wholesale Trade Agents and Brokers	\$31.8	5.6%	94.4%
Support Activities for Oil and Gas Operations	\$30.9	99.8%	0.2%
Petrochemical Manufacturing	\$30.9	0.0%	100.0%
Natural Gas Liquid Extraction	\$27.3	95.8%	4.2%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$27.3	41.2%	58.8%
Rail transportation	\$25.0	58.5%	41.5%
Oil and Gas Field Machinery and Equipment Manufacturing	\$20.9	21.9%	78.1%
General Freight Trucking, Long-Distance, Truckload	\$19.5	72.2%	27.8%

Top 15 Inputs by Dollars

Energy



Top Occupations

Energy

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Wellhead Pumpers	1,920	48%	\$27.54	High school diploma or equivalent
Roustabouts, Oil and Gas	1,582	30%	\$16.19	No formal educational credential
Managers, All Other	1,312	37%	\$18.37	Bachelor's degree
General and Operations Managers	1,188	47%	\$27.44	Bachelor's degree
Service Unit Operators, Oil, Gas, and Mining	1,131	39%	\$21.99	No formal educational credential
Property, Real Estate, and Community Association Managers	971	77%	\$19.29	High school diploma or equivalent
First-Line Supervisors of Construction Trades and Extraction Workers	950	-29%	\$27.71	High school diploma or equivalent
Construction Laborers	798	30%	\$13.76	No formal educational credential
Derrick Operators, Oil and Gas	708	31%	\$20.19	No formal educational credential
Heavy and Tractor-Trailer Truck Drivers	692	6%	\$19.74	Postsecondary nondegree award
Cashiers	667	22%	\$9.52	No formal educational credential
Helpers--Extraction Workers	559	-1%	\$19.10	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	499	-11%	\$14.79	High school diploma or equivalent
Rotary Drill Operators, Oil and Gas	477	38%	\$20.86	No formal educational credential
Electricians	471	-4%	\$25.13	High school diploma or equivalent

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
Specialized Freight (except Used Goods) Trucking, Local	1,348	87	-14	73	607	↑ 535
General Freight Trucking, Local	789	53	-10	43	335	↑ 292
General Freight Trucking, Long-Distance, Truckload	577	88	-6	82	-175	-257
Other Support Activities for Air Transportation	489	27	14	41	256	↑ 214
Specialized Freight (except Used Goods) Trucking, Long-Distance	447	63	59	122	-93	-215
Couriers and Express Delivery Services	292	22	19	41	104	↑ 63
Rail transportation	166	57	5	62	-320	-382
General Freight Trucking, Long-Distance, Less Than Truckload	145	21	9	30	-34	-63
Pipeline Transportation of Natural Gas	132	15	-3	12	0	-12
Motor Vehicle Towing	111	4	7	11	79	↑ 68
Support Activities for Rail Transportation	106	4	13	17	73	↑ 56
Process, Physical Distribution, and Logistics Consulting Services	102	4	4	8	67	↑ 59
Used Household and Office Goods Moving	97	7	3	10	36	↑ 26
Pipeline Transportation of Crude Oil	51	0	1	1	Insf. Data	↑ 48
Local Messengers and Local Delivery	31	3	-2	1	5	↑ 3

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Transportation and Logistics

Industries that Outperformed

- Specialized Freight (except Used Goods) Trucking, Local
- General Freight Trucking, Local
- Other Support Activities for Air Transportation
- Motor Vehicle Towing
- Couriers and Express Delivery Services
- Process, Physical Distribution, and Logistics Consulting Services
- Support Activities for Rail Transportation
- Pipeline Transportation of Crude Oil
- Used Household and Office Goods Moving
- Local Messengers and Local Delivery

Industries that Underperformed

- Pipeline Transportation of Natural Gas
- General Freight Trucking, Long-Distance, Less Than Truckload
- Specialized Freight (except Used Goods) Trucking, Long-Distance
- General Freight Trucking, Long-Distance, Truckload
- Rail transportation

Top Industry Sectors

Transportation and Logistics

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Specialized Freight (except Used Goods) Trucking, Local	285.1	1,348	211,471	7.7
General Freight Trucking, Local	67.1	789	85,095	2.4
General Freight Trucking, Long-Distance, Truckload	19.0	577	32,934	1.0
Other Support Activities for Air Transportation	94.1	489	192,472	5.8
Specialized Freight (except Used Goods) Trucking, Long-Distance	69.2	447	154,815	4.3
Couriers and Express Delivery Services	35.1	292	120,142	0.6
Rail transportation	29.1	166	175,845	1.0
General Freight Trucking, Long-Distance, Less Than Truckload	2.9	145	19,653	0.7
Pipeline Transportation of Natural Gas	16.8	132	127,412	6.3
Motor Vehicle Towing	10.3	111	93,470	1.6
Support Activities for Rail Transportation	14.5	106	136,584	4.2
Process, Physical Distribution, and Logistics Consulting Services	8.1	102	79,557	0.9
Used Household and Office Goods Moving	2.1	97	21,508	1.3
Pipeline Transportation of Crude Oil	3.5	51	68,425	6.4
Local Messengers and Local Delivery	0.8	31	24,930	0.3

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

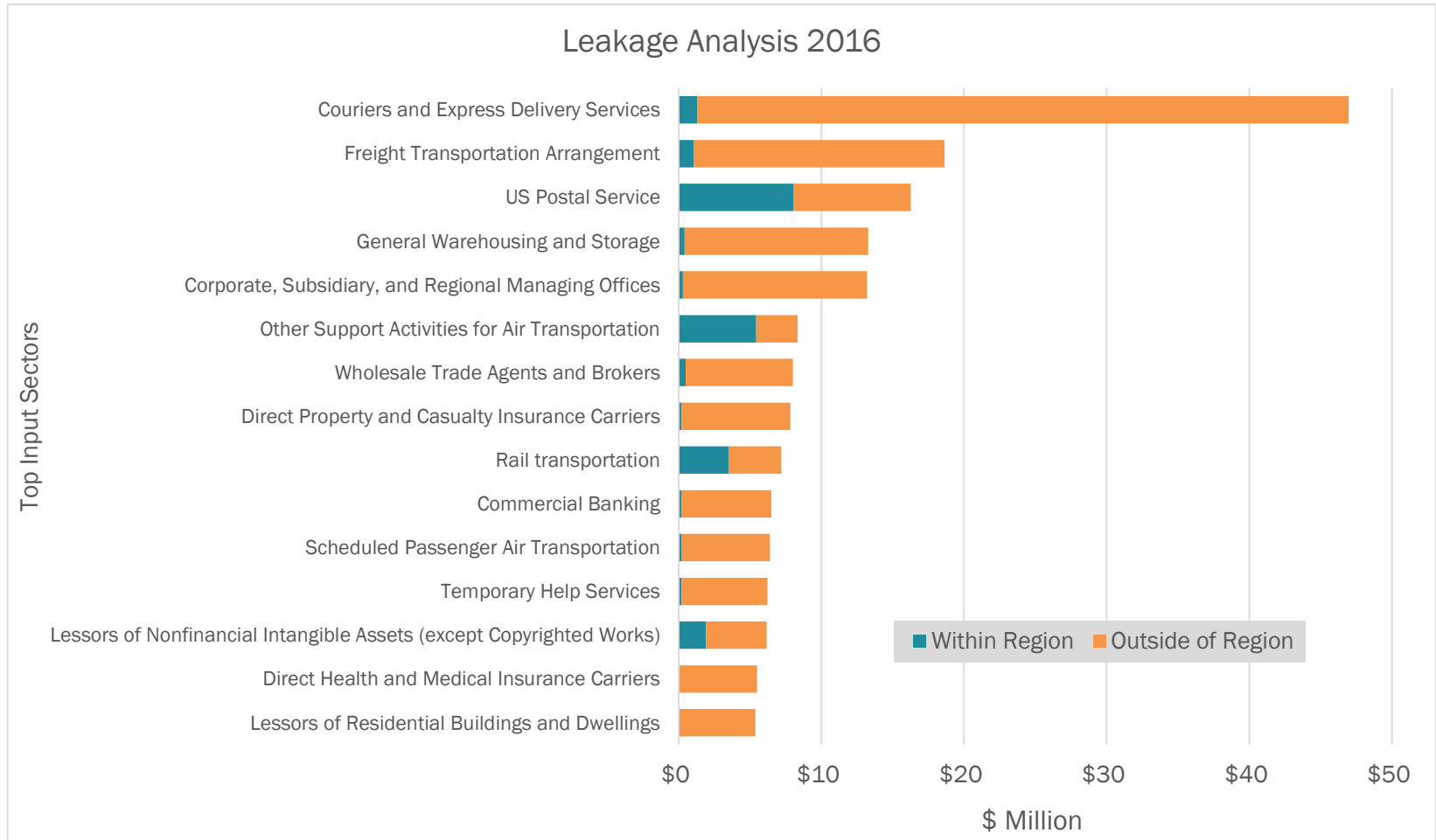
Top 15 Inputs by Dollars

Transportation and Logistics

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Couriers and Express Delivery Services	\$46.96	2.8%	97.2%
Freight Transportation Arrangement	\$18.64	5.6%	94.4%
US Postal Service	\$16.27	49.6%	50.4%
General Warehousing and Storage	\$13.28	3.1%	96.9%
Corporate, Subsidiary, and Regional Managing Offices	\$13.20	2.2%	97.8%
Other Support Activities for Air Transportation	\$8.34	65.3%	34.7%
Wholesale Trade Agents and Brokers	\$8.00	6.2%	93.8%
Direct Property and Casualty Insurance Carriers	\$7.84	2.3%	97.7%
Rail transportation	\$7.18	48.7%	51.3%
Commercial Banking	\$6.50	2.8%	97.2%
Scheduled Passenger Air Transportation	\$6.39	3.4%	96.6%
Temporary Help Services	\$6.21	3.1%	96.9%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$6.16	31.4%	68.6%
Direct Health and Medical Insurance Carriers	\$5.49	0.0%	100.0%
Lessors of Residential Buildings and Dwellings	\$5.39	1.1%	98.9%

Top 15 Inputs by Dollars

Transportation and Logistics



Top Occupations

Transportation and Logistics

Occupations	Jobs 2016	% Change, 2010-2016	Median Hr. Earnings	Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	2,462	27%	\$19.74	Postsecondary nondegree award
Laborers and Freight, Stock, and Material Movers, Hand	338	40%	\$12.55	No formal educational credential
Light Truck or Delivery Services Drivers	222	49%	\$16.63	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	109	42%	\$14.79	High school diploma or equivalent
Bus and Truck Mechanics and Diesel Engine Specialists	100	25%	\$19.06	High school diploma or equivalent
General and Operations Managers	92	51%	\$27.44	Bachelor's degree
Office Clerks, General	82	28%	\$11.49	High school diploma or equivalent
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	74	19%	\$26.70	High school diploma or equivalent
Managers, All Other	73	38%	\$18.37	Bachelor's degree
Couriers and Messengers	70	17%	\$13.82	High school diploma or equivalent
Dispatchers, Except Police, Fire, and Ambulance	69	21%	\$18.66	High school diploma or equivalent
Aircraft Mechanics and Service Technicians	63	85%	\$18.83	Postsecondary nondegree award
Bookkeeping, Accounting, and Auditing Clerks	52	24%	\$16.21	Some college, no degree
Sales Representatives, Services, All Other	41	24%	\$21.14	High school diploma or equivalent
First-Line Supervisors of Office and Administrative Support Workers	41	52%	\$23.12	High school diploma or equivalent

section 02

03 Cluster Comparisons

**Agribusiness, Food Processing
and Technology**

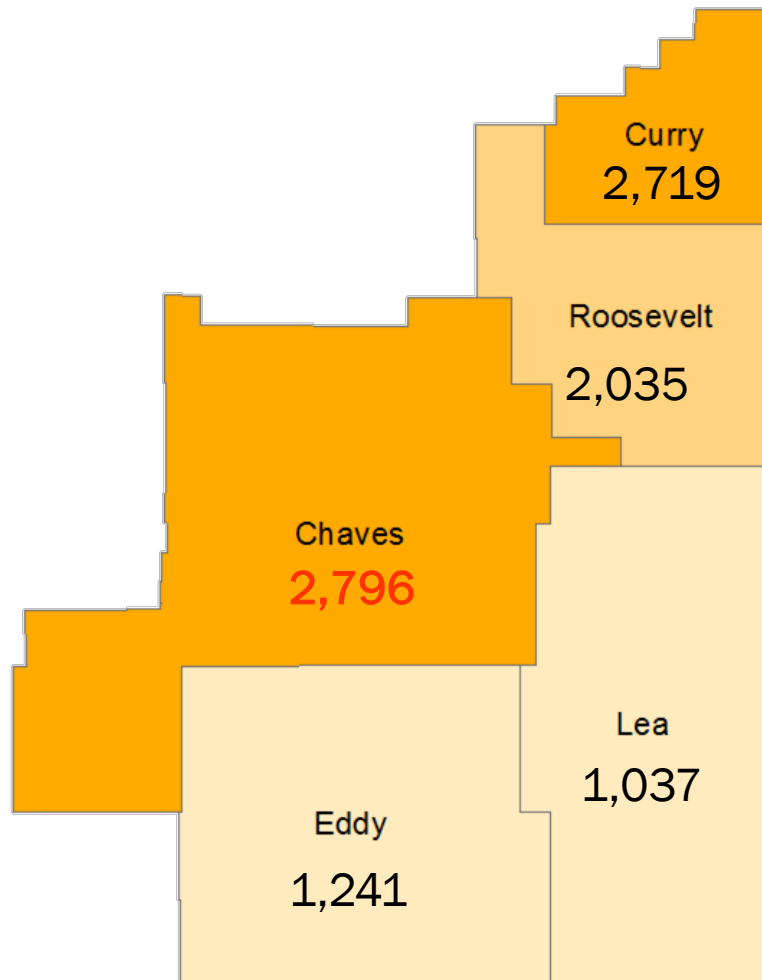
**Arts, Entertainment, Recreation
and Visitor Industries**

Defense and Security

Energy

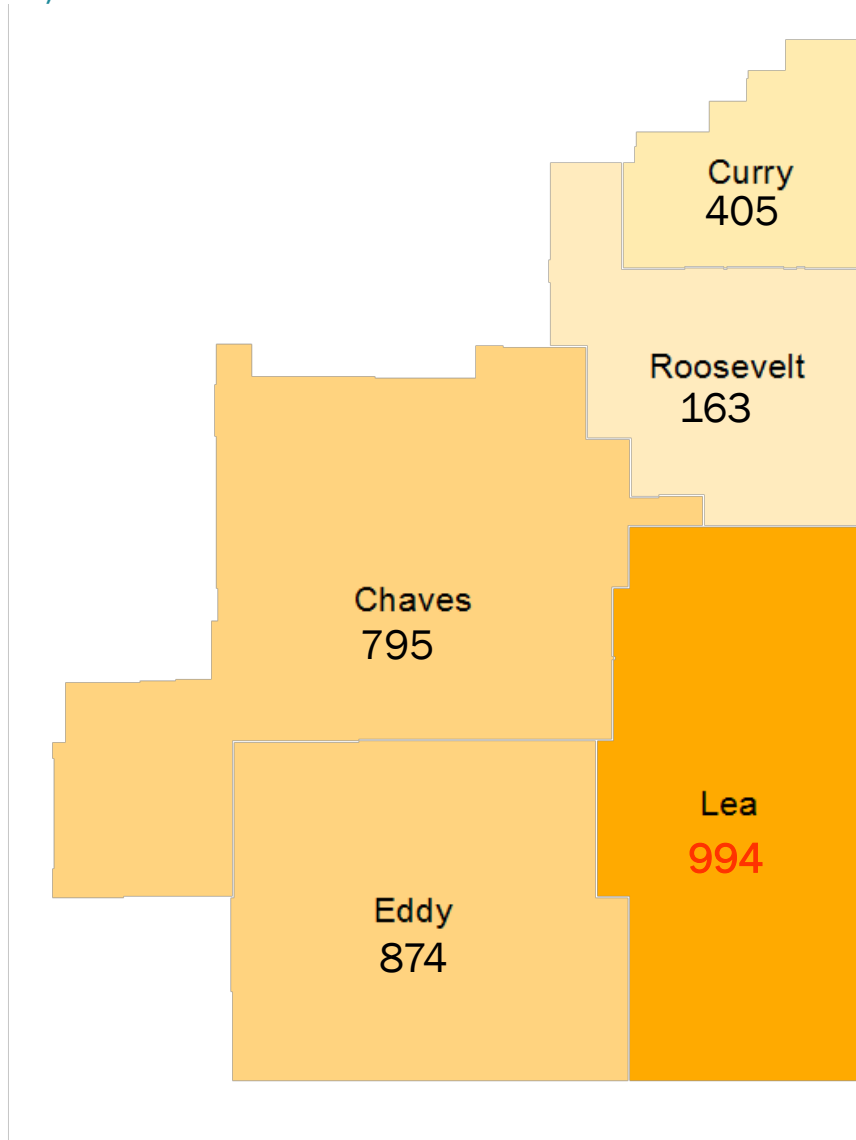
Transportation and Logistics.

Agribusiness, Food Processing and Technology: Contribution by Counties (Jobs 2016)

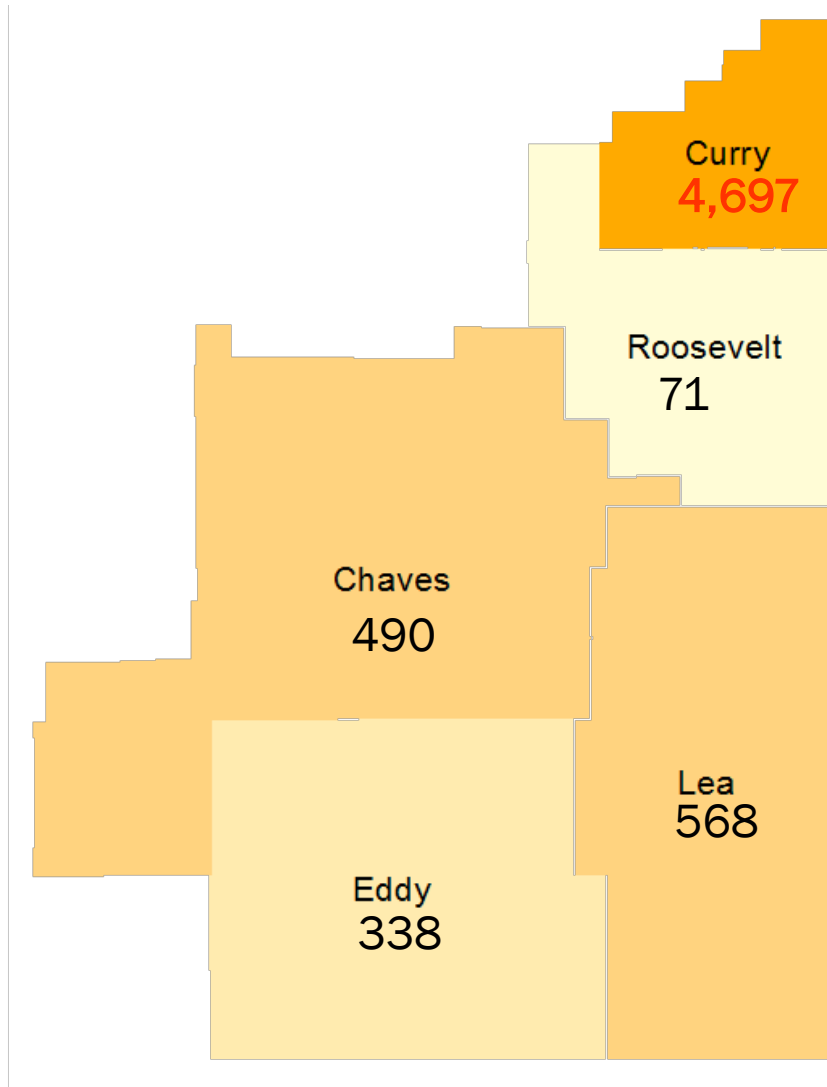


Source: EMSI Class of Worker 2017.3 (QCEW, non -QCEW, self-employed and extended proprietors).

Arts, Entertainment, Recreation and Visitor Industries: Contribution by Counties (Jobs 2016)

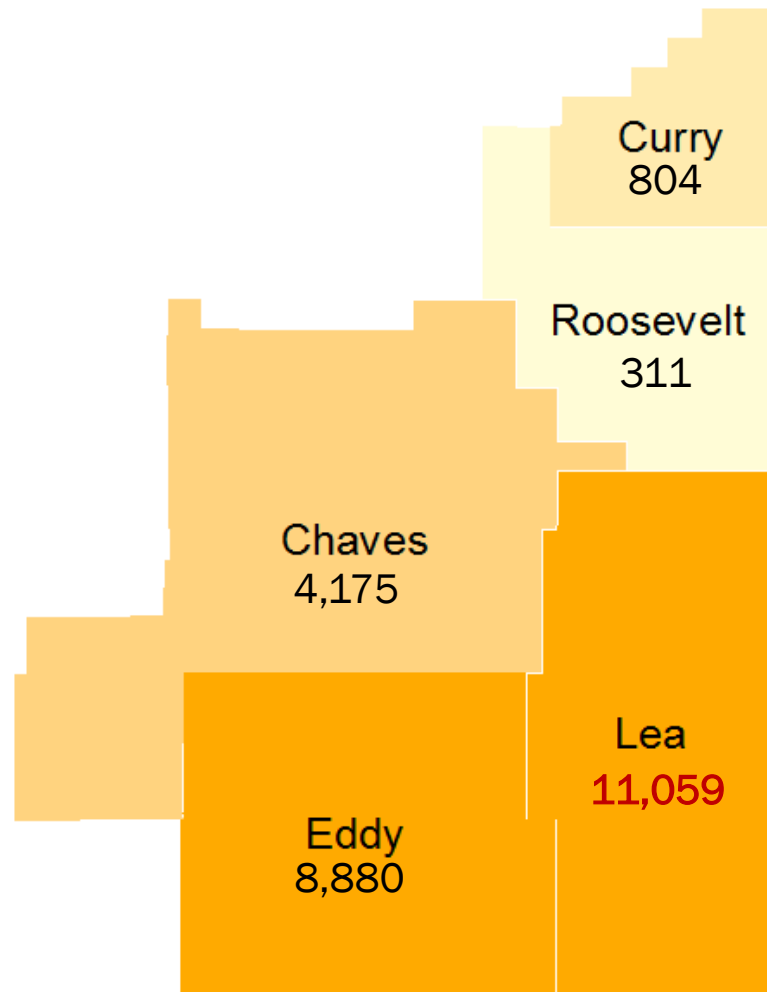


Defense And Security : Contribution by Counties (Jobs 2016)

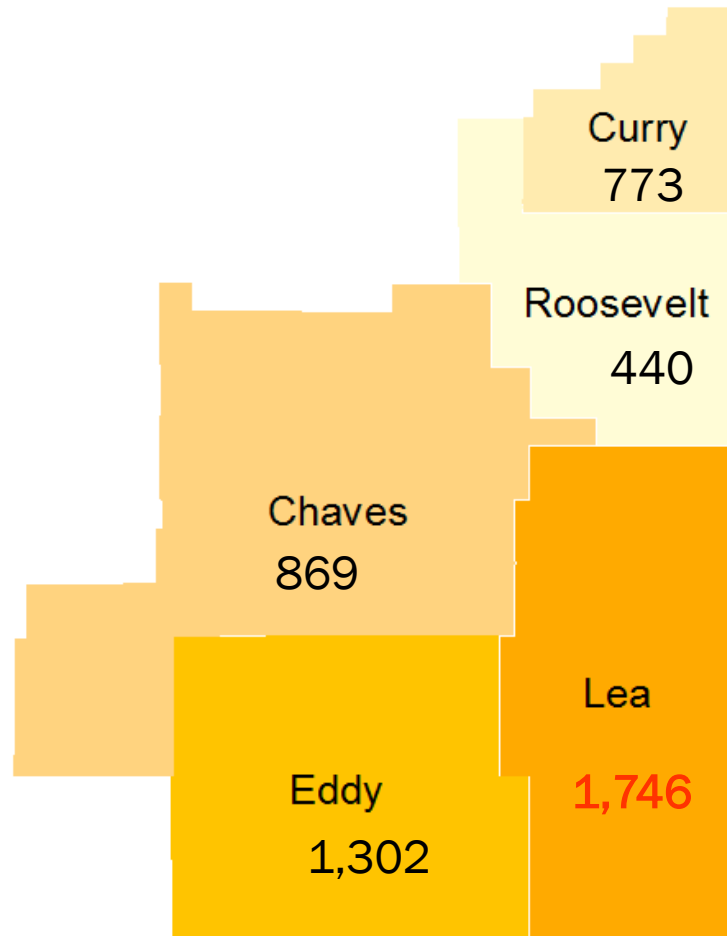


Source: EMSI Class of Worker 2017.3 (QCEW, non -QCEW, self-employed and extended proprietors)

Energy: Contribution by Counties (Jobs 2016)



Transportation and Logistics: Contribution by Counties (Jobs 2016)



Industry Clusters: Components to Assess

	Agribusiness, Food Processing & Technology	Arts, Entertainment, Recreation & Visitor Industries	Defense & Security	Energy	Transportation & Logistics
Regional Performance, 2010-2016	1	151	1,157	543	426
Export value, 2016	\$2,413,397,349	\$201,819,734	\$2,707,998,019	\$6,720,596,554	\$713,658,218
Leakage, 2016	\$1,330,895,202	\$90,398,916	\$1,060,381,939	\$1,242,559,658	\$346,436,561
Establishments, 2016	342	192	80	1,214	345
Contribution by counties	5	5	5	5	5

Business input

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

Resident's value

Review Civic Forum Input from Residents

section 02