



Central Region Industry Analysis

The Central Region is situated in the center of the State of Missouri. Counties included in the Central Region are: Audrain, Boone, Callaway, Camden, Cole, Cooper, Crawford, Dent, Gasconade, Howard, Laclede, Maries, Miller, Moniteau, Morgan, Osage, Phelps, Pulaski and Washington.

This region includes several major cities such as Columbia, Mexico, Rolla, Camdenton, Lebanon and the state capital, Jefferson City. Many of Missouri’s major highways cross through this region. Interstate 44 runs through the southern part of the region, while Interstate 70 crosses the northern part of the region. In addition, Highway 50, Highway 54 and Highway 63 cross through the region, allowing a great deal of travel through the area.

Industry Employment Trends 2009 – 2014

The Central Region experienced overall employment growth since the 2008-09 recession, with employment growth of 3.7% from 2009 to 2014. Employment growth in the region was higher than statewide employment growth of 2.2% for the same period. Industries with the largest employment growth were *Social Assistance* (70.4%), *Administrative and Support Services* (40.1%), and *Professional, Scientific, and Technical Services* (18.1%). Two industries experienced employment loss: *General Merchandise Stores* (-12.8%) and *Hospitals* (-6.5%). Overall employment growth were in the service and health care industries.

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Total Region Employment	258,137	267,655	9,518	3.7%
Educational Services	31,841	33,103	1,262	4%
Food Service and Drinking Places	20,502	22,254	1,752	8.6%
Hospitals	15,500	14,487	-1,013	-6.5%
Ambulatory Health Care Services	9,477	10,494	1,017	10.7%
Justice, Public Order, and Safety Activities	9,792	9,877	85	0.8%
Nursing and Residential Care Facilities	8,323	9,349	1,026	12.3%
Administrative and Support Services	6,468	9,062	2,594	40.1%
Professional, Scientific, and Technical Services	7,566	8,935	1,369	18.1%
Social Assistance	4,270	7,275	2,594	70.4%
General Merchandise Stores	7,583	6,614	1,369	-12.8%

Industry Wage Trends 2009 – 2014

The Central Region had overall wage growth of 7.8%, or over \$2,400, from 2009 to 2014, lower than the statewide average of 9.4%. Industries with the largest wage growth were *Credit Intermediation and Related Activities* (23.6%), *Motor Vehicle and Parts Dealers* (19.7%), and *Speciality Trade Contractors* (17.7%). The industries with the highest wages in 2014 were *Management of Companies and Enterprises* (\$53,304), *Insurance Carriers and Related Activities* (\$49,932), and *Ambulatory Health Care Services* (\$49,512).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Overall Region Average Wage	\$31,032	\$33,456	\$2,424	7.8%
Management of Companies and Enterprises	\$47,628	\$53,304	\$5,676	12%
Insurance Carriers and Related Activities	\$43,128	\$49,932	\$6,804	15.8%
Ambulatory Health Care Services	\$46,644	\$49,512	\$2,868	6.1%
Heavy and Civil Engineering Construction	\$40,512	\$47,580	\$7,068	17.5%
Professional, Scientific, and Technical Services	\$40,920	\$46,272	\$5,352	13.1%
Credit Intermediation and Related Activities	\$34,752	\$42,948	\$8,196	23.6%
Hospitals	\$39,948	\$42,516	\$2,568	6.4%
Educational Services	\$39,660	\$40,764	\$1,104	2.8%
Motor Vehicle and Parts Dealers	\$31,812	\$38,076	\$6,264	19.7%
Specialty Trade Contractors	\$31,728	\$37,332	\$5,604	17.7%

Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections nine industries, employing 5,000 or more, is estimated to have double-digit employment growth from 2012 to 2022. *Administrative and Support Services* industry is estimated to have 38.4% more employment (2,829 more jobs) by 2022. *Speciality Trade Contractors* industry employment is predicted to increase nearly 38% (or 2,349 more jobs). *Professional, Scientific, and Technical Services* industry employment is expected to grow by 24.8% (1,966 more jobs). Most of the industries in the top ten list for employment growth are in service-based and health care industry groups.

NAICS Sector	Change	Percent Change
Educational Services	2,964	9.2%
Food Service and Drinking Places	2,340	10.9%
State Government, Excluding Education and Hospitals	-66	-.3%
Hospitals	2,065	12%
Ambulatory Health Care Services	2,251	23.7%
Local Government, Excluding Education and Hospitals	268	2.4%
Administrative and Support Services	2,829	38.4%
Professional, Scientific, and Technical Services	1,966	24.8%
Nursing and Residential Care Facilities	1,054	13.7%
Specialty Trade Contractors	2,349	37.8%

Industry Clusters and Top Employers

The Central Region's highly concentrated industries are mostly in the services sector as determined by the location quotient indicator. The location quotient (LQ) indicator describes how concentrated an industry is in a region in relation to the nation, with 1.00 being the national average. The most concentrated service industries in the Central Region were *Motor Vehicle and Parts Dealers*, *Nursing and Residential Care Facilities*, and *General Merchandise Stores*. The most concentrated production/manufacturing industries were *Machinery Manufacturing* and *Heavy and Civil Engineering Construction*.

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Motor Vehicle and Parts Dealers	1.53	1.62
Nursing and Residential Care Facilities	1.35	1.45
General Merchandise Stores	1.71	1.44
Machinery Manufacturing	1.76	1.33
Heavy and Civil Engineering Construction	1.43	1.32
Food Services and Drinking Places	1.32	1.26
Credit Intermediation and Related Activities	1.16	1.21
Management of Companies and Enterprises	1.19	1.18
Social Assistance	0.94	1.18
Food and Beverage Stores	0.91	1.09

The Central Region's largest private employers are based in Advanced Manufacturing, Financial/Professional Services, and Health Care Sciences and Services target industry groups. The largest employers in manufacturing are **Scholastic**, **Scroll Compressors**, and **Kraft Foods**. The largest employers in the financial/professional services industry are **MetLife**, **State Farm Insurance**, **Veterans United Home Loans**, and **Shelter Insurance**. Large employers in Health Care are **Boone Hospital**, **University of Missouri Health Care**, and **Phelps County Regional Medical Center**.

Notes

1. 2nd Quarter 2009 and 2nd Quarter 2014 Employment Data from Quarterly Workforce Indicators (QWI) dataset, U.S. Census Bureau, Center for Economic Studies . Industries with less than 5,000 employees were not included in the list.

Sources

1. Industry Employment Projections from MERIC
2. Location Quotient information is calculated from Second Quarter 2009 and 2014 employment figures from the Quarterly Census of Employment and Wages (QCEW), a cooperative program between the Bureau of Labor Statistics and state Labor Market Information offices.
3. Top employer information from InfoUSA Employer Database.

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