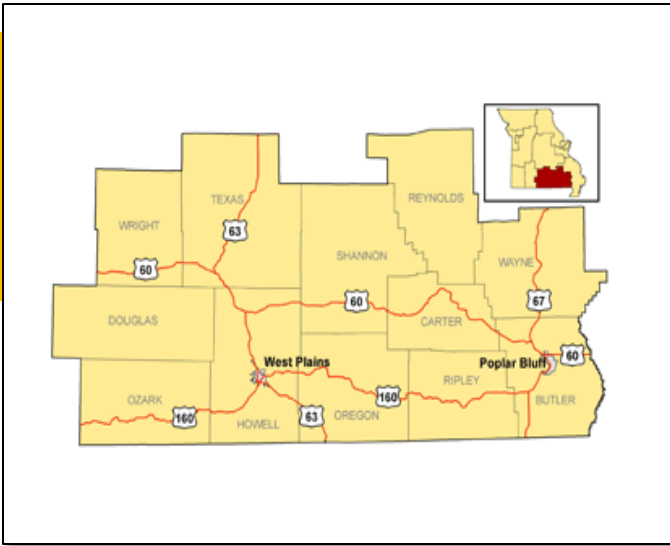


# South Central Region Industry Analysis



The South Central Region is situated in the center of the southern portion of the State of Missouri. Counties included in the South Central Region are: Butler, Carter, Douglas, Howell, Oregon, Ozark, Reynolds, Ripley, Shannon, Texas, Wayne and Wright Counties.

This region includes several major cities such as West Plains and Poplar Bluff. Many of Missouri’s major highways cross through this region. Highway 60 and Highway 160 run east/west through the region, and Highway 63 and Highway 67 cross north/south, allowing a great deal of travel through the area.

## Industry Employment Trends 2009 – 2014

The South Central Region experienced a slight loss of employment from 2009 to 2014 with -.3%, while statewide employment increased 2.2%. The health care/social assistance industry groups had the largest increase in employment during the time period, with *Social Assistance* increasing employment by 120% and *Nursing and Residential Care Facilities* increasing by 12.8%. *Administrative and Support Services* increased employment by 40.3% and *Wood Product Manufacturing* increased employment by 16.5%. *Machinery Manufacturing* (-25%), *General Merchandise Stores* (-6%), and *Educational Services* (-1.9%) lost employment during this period.

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
<b>Total Region Employment</b>	<b>58,635</b>	<b>58,479</b>	<b>-156</b>	<b>-0.3</b>
Educational Services	6,896	6,763	-133	-1.9%
Food Services and Drinking Places	4,069	4,152	83	2%
Social Assistance	1,680	3,700	2,020	120%
Nursing and Residential Care Facilities	2,935	3,312	377	12.8%
Ambulatory Health Care Services	3,148	3,188	40	1.3%
Machinery Manufacturing	3,115	2,338	-777	-25%
Administrative and Support Services	1,493	2,094	601	40.3%
Wood Product Manufacturing	1,742	2,029	287	16.5%
Professional, Scientific, and Technical Services	1,718	1,787	69	4%
General Merchandise Stores	1,764	1,659	-105	-6%

## Industry Wage Trends 2009 – 2014

The South Central Region saw overall wage growth of 8.2%, or over \$2,000, from 2009 to 2014, slightly lower than the statewide wage growth of 9.4%. Wage growth occurred especially in the health care, service, and production/manufacturing industry groups. Industries with the largest growth rate were *Credit Intermediation and Related Activities* (26.2%), *Motor Vehicle and Parts Dealers* (24.8%), and *Professional, Scientific, and Technical Services* (20.2%). One industry, *Merchant Wholesalers, Nondurable Goods* (-0.6%), saw a decline in wages.

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
<b>Overall Region Average Wage</b>	<b>\$25,284</b>	<b>\$27,360</b>	<b>\$2,076</b>	<b>8.2%</b>
Hospitals	\$40,836	\$42,756	\$1,920	4.7%
Professional, Scientific, and Technical Services	\$35,256	\$42,372	\$7,116	20.2%
Credit Intermediation and Related Activities	\$30,120	\$38,004	\$7,884	26.2%
Machinery Manufacturing	\$30,312	\$36,216	\$5,904	19.5%
Educational Services	\$34,344	\$35,832	\$1,488	4.3%
Ambulatory Health Care Services	\$31,356	\$35,784	\$4,428	14.1%
Justice, Public Order, and Safety Activities	\$32,832	\$34,740	\$1,908	5.8%
Motor Vehicle and Parts Dealers	\$25,728	\$32,100	\$6,372	24.8%
Truck Transportation	\$25,860	\$30,648	\$4,788	18.5%
Merchant Wholesalers, Nondurable Goods	\$29,076	\$28,896	-\$180	-0.6%

## Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections, four industries on the list below are estimated to have double-digit percentage growth in employment from 2012 to 2022. The health care industry group is estimated to have the largest growth with *Hospitals, Nursing and Residential Care Facilities*, and *Ambulatory Health Care Services* totaling 1,351 more jobs. The *Administrative and Support Services* industry is estimated to have the highest growth during this period of 36.4%. The *Wood Product Manufacturing* and *Machinery Manufacturing* industries are also expecting to see growth of 9.7% and 1.8% respectively.

NAICS Sector	Change	Percent Change
Educational Services	476	7.7%
Food Service and Drinking Places	413	10.4%
Ambulatory Health Care Services	674	22%
Nursing and Residential Care Facilities	388	12.1%
Hospitals	289	10.4%
Local Government, Excluding Education and Hospitals	65	2.4%
Administrative and Support Services	738	36.4%
Machinery Manufacturing	45	1.8%
General Merchandise Stores	191	8.5%
Wood Product Manufacturing	191	9.7%

## Industry Clusters and Top Employers

The South Central Region's highly concentrated industries are in manufacturing, health Care/social assistance, and retail industry groups, according to 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 region's most concentrated industries are *Wood Product Manufacturing* (13.80) and *Machinery Manufacturing* (4.93). The health care/social assistance industry group has three out of ten industries in the list below: *Social Assistance* (2.40), *Nursing and Residential Care Facilities* (2.40), and *Ambulatory Health Care Services* (1.13).

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Wood Product Manufacturing	11.05	13.80
Machinery Manufacturing	5.88	4.93
Social Assistance	1.25	2.40
Nursing and Residential Care Facilities	2.10	2.35
Truck Transportation	1.97	1.96
General Merchandise Stores	1.80	1.63
Motor Vehicle and Parts Dealers	1.44	1.39
Food and Beverage Stores	1.27	1.27
Credit Intermediation and Related Activities	1.18	1.22
Ambulatory Health Care Services	1.15	1.13

The South Central Region's top employers are in the Health Care and Advanced Manufacturing industry groups. Health Care industry top employers are **Poplar Bluff Regional Medical Center**, **Ozarks Medical Center**, and **Hospice of Care**. Top Advanced Manufacturing employers are **Briggs and Stratton Corp.**, **Scroll Compressors**, **Systems & Electronics**, and **Regal Beloit Corp.**

### Notes

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

### Sources

1. Industry Employment Projections from MERIC
2. Location Quotient information is calculated from annual 2009 and 2013 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.