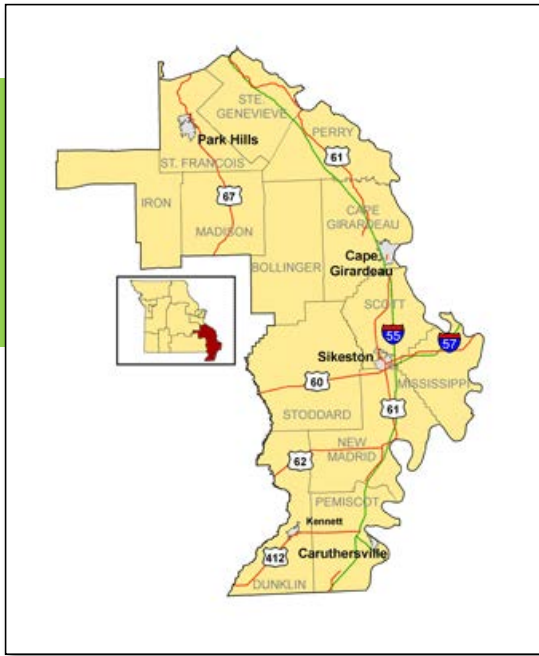


# Southeast Region Industry Analysis



The Southeast Region is situated along the Mississippi River, bordering Illinois, Kentucky, Tennessee, and Arkansas. Counties included in the Southeast Region are: Bollinger, Cape Girardeau, Dunklin, Iron, Madison, Mississippi, New Madrid, Pemiscot, Perry, Ste. Genevieve, St. Francois, Scott and Stoddard.

This region includes several major cities such as Cape Girardeau, Sikeston, Caruthersville and Park Hills. Many of Missouri’s major highways cross through this region. Interstate 55 runs through the eastern part of the region, while Interstate 57 travels mainly through Mississippi County. In addition, Highway 60, Highway 61, Highway 62, Highway 67 and Highway 412 cross through the region, allowing a great deal of travel through the area.

## Industry Employment Trends 2009 – 2014

The Southeast Region experienced overall employment growth of 3.4% from 2009 to 2014. Employment grew faster in the region compared to the state employment growth of 2.2%. Industries with the largest growth were *Social Assistance* (59%), *Merchant Wholesalers, Durable Goods* (12.8%), and *Food Manufacturing* (8.6%). The industry group with the largest employment growth was the Health Care sector with *Hospitals, Ambulatory Health Care Services, and Nursing and Residential Care Facilities* all growing. Two industries lost employment during the period: *Educational Services* and *Justice, Public Order, and Safety Activities*.

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
<b>Total Region Employment</b>	<b>136,215</b>	<b>140,847</b>	<b>4,632</b>	<b>3.4%</b>
Educational Services	13,415	12,843	-572	-4.3%
Food Services and Drinking Places	9,461	9,928	467	4.9%
Hospitals	9,164	9,563	399	4.4%
Social Assistance	5,573	8,858	3,285	59%
Ambulatory Health Care Services	6,384	6,799	415	6.5%
Nursing and Residential Care Facilities	6,717	6,758	41	0.6%
Administrative and Support Services	4,818	4,956	138	2.9%
Justice, Public Order, and Safety Activities	4,193	4,063	-130	-3.1%
Food Manufacturing	3,503	3,804	301	8.6%
Merchant Wholesalers, Durable Goods	3,356	3,786	430	12.8%

## Industry Wage Trends 2009 – 2014

The Southeast Region saw overall wage growth of nearly 9.8%, or over \$2,800, from 2009 to 2014. The region's wage growth was slightly higher than the statewide growth rate of 9.4%. Industries with the largest wage growth were *Transportation Equipment Manufacturers* (30.5%), *Plastics and Rubber Products Manufacturing* (26.3%), and *Specialty Trade Contractors* (24.1%). The industries with the largest wages were *Hospitals* (\$46,440), *Merchant Wholesalers, Durable Goods* (\$43,836), and *Transportation Equipment Manufacturing* (\$43,188). One industry had a slight wage decrease, *Ambulatory Health Care Services*.

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
<b>Overall Region Average Wage</b>	<b>\$29,160</b>	<b>\$32,004</b>	<b>\$2,844</b>	<b>9.8%</b>
Hospitals	\$43,248	\$46,440	\$3,192	7.4%
Merchant Wholesalers, Durable Goods	\$38,112	\$43,836	\$5,724	15%
Transportation Equipment Manufacturing	\$33,108	\$43,188	\$10,080	30.5%
Educational Services	\$39,720	\$41,436	\$1,716	4.3%
Specialty Trade Contractors	\$33,240	\$41,244	\$8,004	24.1%
Plastics and Rubber Products Manufacturing	\$35,076	\$39,636	\$4,560	26.3%
Ambulatory Health Care Services	\$38,784	\$38,532	-\$252	-0.7%
Merchant Wholesalers, Nondurable Goods	\$32,700	\$38,484	\$5,784	17.7%
Food Manufacturing	\$33,252	\$37,752	\$4,500	13.5%
Credit Intermediation and Related Activities	\$32,544	\$37,224	\$4,680	14.4%

## Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections, five industries in the list below are projected to have double-digit employment growth from 2012 to 2022. The health care industry group is expected to register the largest growth with *Hospitals* (8.7% or 792 jobs), *Ambulatory Health Care Services* (20.2% or 1,214 jobs), and *Nursing and Residential Care Facilities* (10.4% or 600 jobs) leading the way. Other industries predicted to have high growth are *Administrative and Support Services* (34.4% or 1,635 jobs) and *Specialty Trade Contractors* (940 and 28.8%).

NAICS Sector	Change	Percent Change
Educational Services	685	6.1%
Food Service and Drinking Places	818	8.8%
Hospitals	792	8.7%
Social Assistance	1,184	19.5%
Ambulatory Health Care Services	1,214	20.2%
Administrative and Support Services	1,635	34.4%
Nursing and Residential Care Facilities	600	10.4%
Local Government, Excluding Education and Hospitals	144	2.4%
General Merchandise Stores	319	7%
Specialty Trade Contractors	940	28.8%

## Industry Clusters and Top Employers

The Southeast Region's highly concentrated industries are centered on manufacturing, 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 most concentrated manufacturing industries in the region are *Plastic and Rubber Products Manufacturing*, *Food Manufacturing*, and *Transportation Equipment Manufacturing*. Other highly concentrated manufacturing industries in the region are *Primary Metal Manufacturing* (3.53) and *Wood Product Manufacturing* (2.98).

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Plastics and Rubber Products Manufacturing	3.23	3.62
Social Assistance	2.08	2.60
Food Manufacturing	2.24	2.53
Truck Transportation	2.27	1.99
Nursing and Residential Care Facilities	1.72	1.73
General Merchandise Stores	1.50	1.38
Hospitals	1.28	1.37
Transportation Equipment Manufacturing	1.42	1.36
Building Material and Garden Equipment and Supplies Dealer	1.22	1.26
Motor Vehicle and Parts Dealers	1.30	1.26

The Southeast Region's top employers are classified in the state's Health Care and Advanced Manufacturing target industry groups. Large employers in the Advanced Manufacturing industry group are **Proctor & Gamble** (*Surgical and Medical Instrument Manufacturing*), **SRG Global** (*Plastic and Rubber Products Manufacturing*), and **TG Missouri Corp** (*Transportation Equipment Manufacturing*). Large food manufacturers in the region are **Tyson Foods** (*Food Manufacturing*). Large employers in the Health Care industry groups are **St. Francis Medical Center**, **Southeast Health**, and **Missouri Delta Medical Center**.

### 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 2,000 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.

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