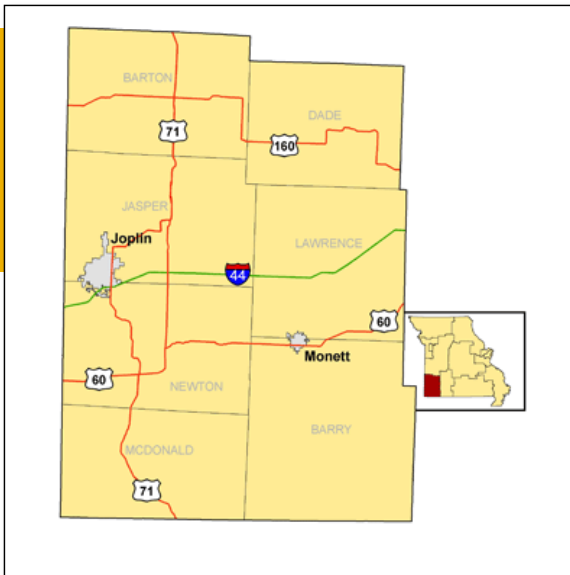


Southwest Region Industry Analysis



The Southwest Region is situated in the southwest corner of the State of Missouri. Counties included in the Central Region are: Barry, Barton, Dade, Jasper, Lawrence, McDonald and Newton.

This region includes several major cities such as Joplin and Monett. Many of Missouri’s major highways cross through this region. Interstate 44 runs through the center of the region. In addition, Highway 60, Highway 160 and Highway 71 cross

through the region, allowing a great deal of travel through the area. This region shares a border with 3 states – Arkansas, Oklahoma and Kansas.

Industry Employment Trends 2009 – 2014

The Southwest Region experienced overall employment growth of 0.6% from 2009 to 2014, which was lower than the statewide employment growth of 2.2%. Industries with the largest employment growth were *Professional, Scientific, and Technical Services* (51.6%), *Administrative and Support Services* (29.6%), and *Food Manufacturing* (19.1%); service-based industries experienced the most growth. Four industries lost employment during the time period: *Truck Transportation* (-27.7%), *Hospitals* (-14%), *Nursing and Residential Care Facilities* (-5.6%), and *General Merchandise Stores* (-1.3%).

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Educational Services	10,757	11,277	520	4.8%
Food Manufacturing	8,258	9,837	1,579	19.1%
Food Services and Drinking Places	7,388	8,289	901	12.2%
Hospitals	7,342	6,313	-1,029	-14%
Truck Transportation	7,347	5,315	-2,032	-27.7%
Administrative and Support Services	3,630	4,705	1,075	29.6%
Ambulatory Health Care Services	4,041	4,465	424	10.5%
General Merchandise Stores	3,758	3,709	-49	-1.3%
Nursing and Residential Care Facilities	3,579	3,379	-200	-5.6%
Professional, Scientific, and Technical Services	2,199	3,333	1,134	51.6%

Industry Wage Trends 2009 – 2014

The Southwest Region saw overall wages increase by 4.5%, or over \$1,300, lower than the statewide wage growth of 9.4%. Wage growth was highest in several manufacturing and sales industries. Industries with the highest wage growth during the period were *Professional, Scientific, and Technical Services* (39.5%), *Electrical Equipment, Appliance, and Component Manufacturing* (20.7%), and *Merchant Wholesalers, Durable Goods* (16.8%). Three industries had wages decreased during this period: *Truck Transportation* (-6.6%), *Educational Services* (-1.9%), and *Hospitals* (-0.7%).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Hospitals	\$50,124	\$49,788	-\$336	-0.7%
Professional, Scientific, and Technical Services	\$33,096	\$46,176	\$13,080	39.5%
Electrical Equipment, Appliance, and Component Manufacturing	\$35,208	\$42,480	-\$3,792	20.7%
Ambulatory Health Care Services	\$40,716	\$40,920	\$204	0.5%
Educational Services	\$41,052	\$40,284	-\$768	-1.9%
Fabricated Metal Product Manufacturing	\$35,052	\$39,828	\$4,776	13.6%
Truck Transportation	\$42,288	\$39,492	\$3,816	-6.6%
Transportation Equipment Manufacturing	\$33,996	\$38,928	\$4,932	14.5%
Merchant Wholesalers, Durable Goods	\$32,748	\$38,256	\$5,508	16.8%
Motor Vehicle and Parts Dealers	\$32,544	\$37,920	\$5,376	16.5%

Industry Employment Projections 2012 – 2022

Based on long-term employment projections, five industries in the list below are estimated to have double-digit percentage employment growth from 2012 to 2022. The top three industries projected to have the highest employment growth by percentage are *Administrative and Support Services* (33.6% or 1,667 jobs), *Professional, Scientific, and Technical Services* (20.5% or 596 jobs), and *Ambulatory Health Care Services* (19.5% or 806 jobs). Industry employment growth is prevalent throughout the industry groups, especially in the Health Care and Service-based industries.

NAICS Sector	2012 Estimated Employment	2022 Projected Employment	Change	Percent Change
Educational Services	9,205	9,706	501	5.4%
Food Service and Drinking Places	7,833	8,469	636	8.1%
Hospitals	6,151	6,646	495	8.1%
Administrative and Support Services	4,964	6,631	1,667	33.6%
Truck Transportation	5,761	6,422	751	13.2%
Ambulatory Health Care Services	4,144	4,950	806	19.5%
General Merchandise Stores	4,417	4,696	279	6.3%
Local Government, Excluding Education and Hospitals	3,770	3,860	90	2.4%
Fabricated Metal Product Manufacturing	3,165	3,686	521	16.5%
Professional, Scientific, and Technical Services	2,914	3,510	596	20.5%

Industry Clusters and Top Employers

According to the location quotient indicator, manufacturing is the Southwest Region's most highly concentrated industry group. 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 industry is *Food Manufacturing* (7.08), *Electrical Equipment Manufacturing* (5.46) comes in second. *Food Manufacturing* is a highly concentrated industry due to the highly concentrated *Animal Production* and *Truck Transportation* industries.

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Food Manufacturing	6.83	7.08
Electrical Equipment, Appliance, and Component Manufacturing	4.89	5.46
Animal Production	5.23	4.94
Truck Transportation	5.83	4.90
Furniture and Related Product Manufacturing	8.28	4.48
Fabricated Metal Product Manufacturing	2.76	2.47
General Merchandise Stores	1.71	1.60
Building Material and Garden Equipment and Supplies Dealer	1.27	1.39
Motor Vehicle and Parts Dealers	1.35	1.38
Hospitals	1.32	1.26

The Southwest Region' top employers are based in the Health Care, Advanced Manufacturing, and Information Technology target industry group. Large health care employers include **Freeman Health Systems** and **Mercy Hospital**. Large manufacturers include **A Pella**, **Fasco Motors**, **Tyson Foods**, **Simmons Foods**, and **Eagle Picher Technologies**. Large information technology employers in the region include **Jack Henry & Associates** and **Americold Logistics**.

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 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.

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