

# TARGET MISSOURI 3 - TM3

## *INDUSTRY DRIVERS OF THE ECONOMY*

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April 2004

MISSOURI DEPARTMENT OF ECONOMIC DEVELOPMENT



MISSOURI ECONOMIC RESEARCH & INFORMATION CENTER

## OVERVIEW

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A common practice in economic development is to craft public policies to support an economy's "target industries". It is assumed by policy makers that public investments in these target industries will create economic growth and wealth for the region. Although this development approach is supported by a segment of economic theory, oftentimes the methods used to identify target industries are simplistic and politically driven. Therefore, it is critical that economic development officials base target industry policies on sound economic theory and rigorous methods.

Target Missouri 3 - TM3 - was developed to assist economic development officials in targeting industries based on sound economic theory and methods. TM3 is a methodology for identifying the industrial drivers of an economy, grounded in economic base theory. TM3 can affect economic development policy by providing a well conceptualized and empirically based definition of which industries are drivers of a region's economy. When targeted industries are identified using political rather than empirical justifications, development agencies run the risk of investing scarce resources into groups of industries that will produce little to no economic benefits. When targeted industries are identified empirically, economic development policies and resources can be directed to the most viable parts of the economy. TM3 is an extension of previous Target Missouri initiatives, the first of which began in the mid-1990s. TM3 substantially improves upon previous initiatives by: (1) offering greater geographic detail and flexibility using county-based data; (2) offering greater industry detail for over 500 specific economic sectors; (3) offering more diverse and appropriate economic base indicators, such as exports, output and productivity; and (4) offering a statistically sound method for classifying industries.

Target industry development policies are grounded in economic base theory. The essential idea is that some activities in a region are peculiarly basic in the sense that their growth leads and determines the region's overall development; while other non-basic activities are simply consequences of the region's overall development. Economic base theory identifies basic activities as those that bring in money from the outside world, generally by producing goods or services for export. The argument advanced for this approach is that a region, like a household or a business firm, must earn its livelihood by producing something that others will pay for. Activities that simply serve the regional market are there as a result of whatever level of income and demand the region may have achieved - they are passive participants in growth but not prime movers. A household, a neighborhood, a firm, or a region cannot get richer by simply "taking in its own washing"; it must sell something to others in order to get more income. Consequently, exports are viewed as providing the economic base of a region's growth.

**For more information and to access the full report:  
[www.ded.mo.gov](http://www.ded.mo.gov)**

## Competitive Fast Growth Cluster

Compared to national industry averages, these Missouri industries had:  
 High specialization in output, employment, compensation and exports.  
 Fast growth in employment, compensation and exports.  
 Above average growth in output and exports.  
 Above average productivity.

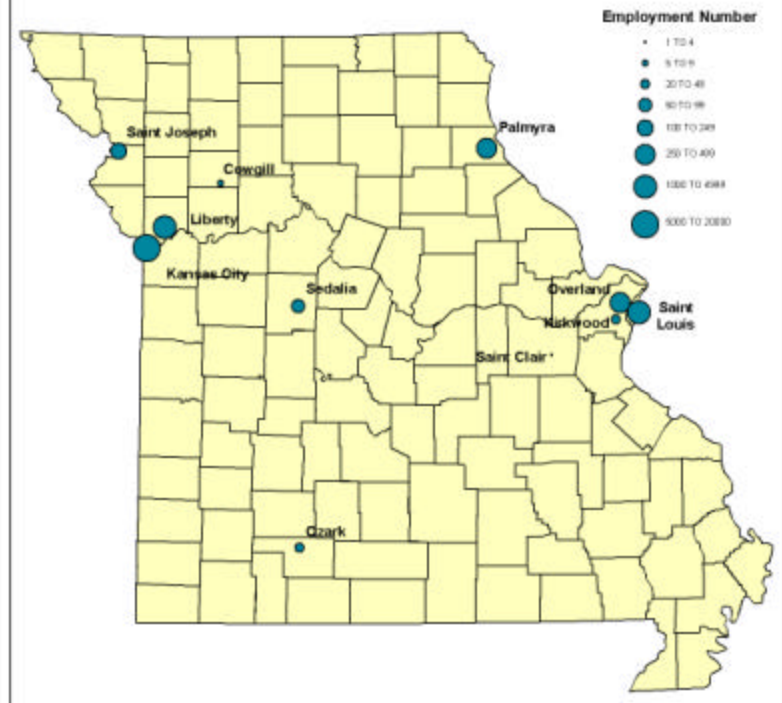
### Economic Competitiveness Variables

Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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### Competitive Fast Growth Cluster

### Standard Industrial Classification

Lead and Zinc Ores	1030
Greeting Card Publishing	2770
Agricultural Chemicals, N.E.C	2879
Small Arms Ammunition	3482
Lead and Zinc Ores	1030



NOTE: High values denoted by ++. Above average values denoted by +. Average values denoted by =. Below average values denoted by -. Low values are denoted by --.

**Competitive Fast Growth**

<b>INDUSTRY</b>	<b>SIC</b>	<b>FIRM NAME</b>	<b>CITY</b>	<b>COUNTY</b>	<b>MSA</b>	<b>EMPLOYMENT</b>	<b>SALES</b>
Greeting Card Publishing	2770	HALLMARK CARDS INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	5,000 to 9,999	OVER \$1 BILLION
Greeting Card Publishing	2770	HALLMARK MARKETING CORP	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	5,000 to 9,999	NA
Greeting Card Publishing	2770	HALLMARK CARDS INC	LIBERTY	CLAY	KANSAS CITY, MO-KS	1,000 to 4,999	\$100 to \$500 MILLION
Agricultural Chemicals, N.E.C	2879	MONSANTO CO	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	1,500	OVER \$4.5 BILLION
Agricultural Chemicals, N.E.C	2879	BASF CORP	PALMYRA	MARION		250 to 499	\$100 to \$500 MILLION
Agricultural Chemicals, N.E.C	2879	SPECTRUM GROUP	OVERLAND	ST LOUIS	ST LOUIS, MO-IL	250 to 499	\$100 to \$500 MILLION
Agricultural Chemicals, N.E.C	2879	WILLERT HOME PRODUCTS INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	250 to 499	\$100 to \$500 MILLION
Agricultural Chemicals, N.E.C	2879	OMNIUM	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	100 to 249	\$50 to \$100 MILLION
Agricultural Chemicals, N.E.C	2879	UNITED INDUSTRIES CORP	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	100 to 249	\$100 to \$500 MILLION
Agricultural Chemicals, N.E.C	2879	WHITMIRE MICROGEN RESEARCH LAB	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	100 to 249	NA
Agricultural Chemicals, N.E.C	2879	HPI INC	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	50 to 99	\$50 to \$100 MILLION
Agricultural Chemicals, N.E.C	2879	PBI GORDON CORP	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	50 to 99	\$20 to \$50 MILLION
Small Arms Ammunition	3482	SIERRA BULLETS	SEDALIA	PETTIS		50 to 99	\$10 to \$20 MILLION
Agricultural Chemicals, N.E.C	2879	BAYER CROPSCIENCE	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	20 to 49	\$20 to \$50 MILLION
Agricultural Chemicals, N.E.C	2879	SENORET CHEMICAL CO	KIRKWOOD	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$1 to \$2.5 MILLION
Small Arms Ammunition	3482	FIOCCHI OF AMERICA	OZARK	CHRISTIAN	SPRINGFIELD, MO	20 to 49	\$2.5 to \$5 MILLION
Agricultural Chemicals, N.E.C	2879	SUR GRO PLANT FOOD CO	COWGILL	CALDWELL		5 to 9	\$5 to \$10 MILLION
Greeting Card Publishing	2770	HALLMARK CARDS INC	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	1 to 4	\$1 to \$2.5 MILLION
Agricultural Chemicals, N.E.C	2879	H & C CO INC	ST CLAIR	FRANKLIN	ST LOUIS, MO-IL	1 to 4	\$1 to \$2.5 MILLION
Agricultural Chemicals, N.E.C	2879	SURE-SHOT CHEMICAL SUPPLY	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	1 to 4	\$1 to \$2.5 MILLION

### Competitive Slow Growth Cluster

Compared to national industry averages, these Missouri industries had:  
 High specialization in output, employment, compensation and exports.  
 Average growth in output, employment, compensation and exports.  
 Average productivity.

#### Economic Competitiveness Variables

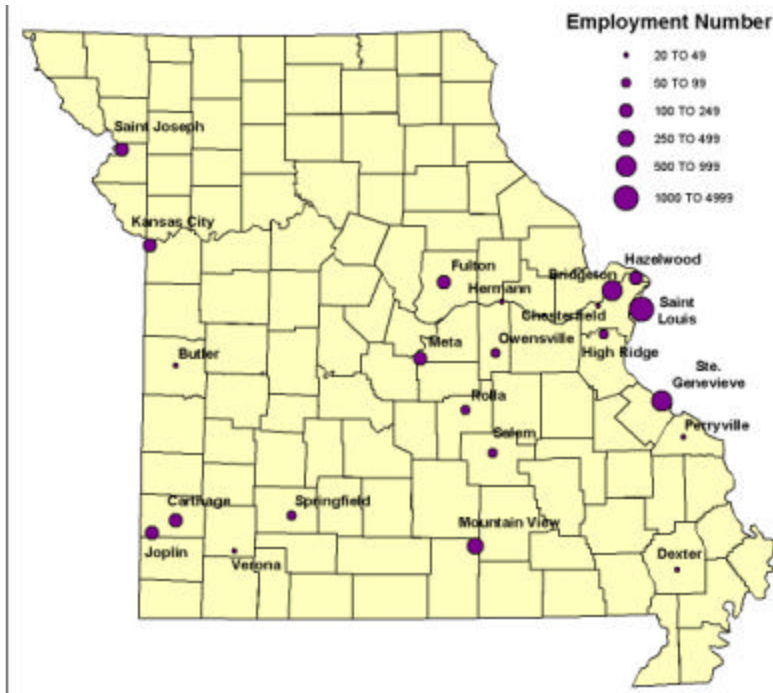
#### Competitive Slow Growth Cluster

#### Standard Industrial Classification

Grass Seeds	0139
Dog, Cat, and Other Pet Food	2047
Malt Beverages	2082
Macaroni and Spaghetti	2098
Special Product Sawmills, N.E.C	2429
Footwear Cut Stock	3130
Clay Refractories	3255
Lime	3274
Automatic Merchandising Machine	3581

Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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**Competitive Slow Growth**

<b>INDUSTRY</b>	<b>SIC</b>	<b>FIRM NAME</b>	<b>CITY</b>	<b>COUNTY</b>	<b>MSA</b>	<b>EMPLOYMENT</b>	<b>SALES</b>
Dog, Cat, and Other Pet Food	2047	NESTLE PURINA PETCARE CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	1,000 to 4,999	OVER \$1 BILLION
Lime	3274	MISSISSIPPI LIME CO	STE GENEVIEVE	STE GENEVIEVE		500 to 999	\$100 to \$500 MILLION
Automatic Merchandising Machine	3581	CRANE MERCHANDISING SYSTEMS	BRIDGETON	ST LOUIS	ST LOUIS, MO-IL	500 to 999	NA
Automatic Merchandising Machine	3581	COIN ACCEPTORS INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	250 to 499	NA
Automatic Merchandising Machine	3581	MOUNTAIN VIEW FABRICATING	MOUNTAIN VIEW	HOWELL		250 to 499	\$50 to \$100 MILLION
Dog, Cat, and Other Pet Food	2047	DIAMOND PET FOODS	META	OSAGE		100 to 249	\$50 to \$100 MILLION
Dog, Cat, and Other Pet Food	2047	DOANE PET CARE	JOPLIN	JASPER	JOPLIN, MO	100 to 249	\$100 to \$500 MILLION
Dog, Cat, and Other Pet Food	2047	NESTLE PURINA PETCARE CO	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	100 to 249	\$100 to \$500 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	OVER \$1 BILLION
Macaroni and Spaghetti	2098	NEW WORLD PASTA CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	\$50 to \$100 MILLION
Clay Refractories	3255	AP GREEN REFRACTORIES	FULTON	CALLAWAY		100 to 249	\$20 to \$50 MILLION
Lime	3274	CARTHAGE CRUSHED LIMESTONE CO	CARTHAGE	JASPER	JOPLIN, MO	100 to 249	\$50 to \$100 MILLION
Automatic Merchandising Machine	3581	CRANE MERCHANDISING SYSTEMS	HAZELWOOD	ST LOUIS	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH COMPANIES INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	200	OVER \$19 BILLION
Dog, Cat, and Other Pet Food	2047	ROYAL CANIN USA INC	ROLLA	PHELPS		50 to 99	\$20 to \$50 MILLION
Malt Beverages	2082	ST LOUIS BREWERY INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	50 to 99	\$20 to \$50 MILLION
Special Product Sawmills, N.E.C	2429	SALEM WOOD PRODUCTS	SALEM	DENT		50 to 99	\$5 to \$10 MILLION
Clay Refractories	3255	EMHART GLASS MFG INC	OWENSVILLE	GASCONADE		50 to 99	\$10 to \$20 MILLION
Lime	3274	ASH GROVE CEMENT CO	SPRINGFIELD	GREENE	SPRINGFIELD, MO	50 to 99	\$20 to \$50 MILLION
Lime	3274	CHEMICAL LIME CO OF MISSOURI	STE GENEVIEVE	STE GENEVIEVE		50 to 99	\$10 to \$20 MILLION
Automatic Merchandising Machine	3581	COIN ACCEPTORS INC	HIGH RIDGE	JEFFERSON	ST LOUIS, MO-IL	50 to 99	\$10 to \$20 MILLION
Macaroni and Spaghetti	2098	AMERICAN ITALIAN PASTA CO	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	64	438844000
Dog, Cat, and Other Pet Food	2047	AMERICAN DEHYDRATED FOOD	VERONA	LAWRENCE		20 to 49	\$20 to \$50 MILLION
Dog, Cat, and Other Pet Food	2047	DOANE PET CARE	BUTLER	BATES		20 to 49	\$20 to \$50 MILLION
Dog, Cat, and Other Pet Food	2047	DOANE PET CARE	DEXTER	STODDARD		20 to 49	\$20 to \$50 MILLION
Dog, Cat, and Other Pet Food	2047	MANNA PRO CORP	CHESTERFIELD	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$20 to \$50 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	20 to 49	\$10 to \$20 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	20 to 49	\$10 to \$20 MILLION
Malt Beverages	2082	CALVIN'S DISTRIBUTING CO	HERMANN	GASCONADE		20 to 49	\$20 to \$50 MILLION
Malt Beverages	2082	ROUTE 66 BREWERY & RESTAURANT	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	20 to 49	\$20 to \$50 MILLION
Special Product Sawmills, N.E.C	2429	PERRYVILLE STAVE CO INC	PERRYVILLE	PERRY		20 to 49	\$2.5 to \$5 MILLION
Grass Seeds	0139	FMC CORP	KANSAS CITY	PLATTE	KANSAS CITY, MO-KS	20 to 49	\$2.5 to \$5 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$5 to \$10 MILLION
Macaroni and Spaghetti	2098	MARIA & SON ITALIAN PRODUCTS	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$5 to \$10 MILLION
Lime	3274	APAC MISSOURI INC	MARSHALL	SALINE		10 to 19	\$2.5 to \$5 MILLION
Lime	3274	MILLERSBURG QUARRY	KINGDOM CITY	CALLAWAY		10 to 19	\$2.5 to \$5 MILLION
Automatic Merchandising Machine	3581	DOVE MANUFACTURING INC	WINFIELD	LINCOLN	ST LOUIS, MO-IL	10 to 19	\$2.5 to \$5 MILLION
Grass Seeds	0139	SUPERIOR GEAR BOX	BUFFALO	DALLAS		10 to 19	\$1 to \$2.5 MILLION
Dog, Cat, and Other Pet Food	2047	BEST FEED & FARM SUPPLIES INC	WEST PLAINS	HOWELL		5 to 9	\$5 to \$10 MILLION
Special Product Sawmills, N.E.C	2429	GARY MARTIN FARM RESIDENCES	VERSAILLES	MORGAN		5 to 9	\$500,000 to \$1 MILLION
Special Product Sawmills, N.E.C	2429	WILSON LUMBER CO	CLINTON	HENRY		5 to 9	\$500,000 to \$1 MILLION

**Competitive Slow Growth**

Lime	3274	RUBLE ROCK & LIME CO	PIEDMONT	WAYNE		5 to 9	\$1 to \$2.5 MILLION
Lime	3274	WILKERSON BROTHERS QUARRY	PARIS	MONROE		5 to 9	\$1 to \$2.5 MILLION
Grass Seeds	0139	CHEM STAR AGRI PRODUCTS INC	PARMA	NEW MADRID		5 to 9	\$500,000 to \$1 MILLION
Grass Seeds	0139	D G & G COTTON GIN	PARMA	NEW MADRID		5 to 9	\$1 to \$2.5 MILLION
Grass Seeds	0139	VAL-CO	BUFFALO	DALLAS		5 to 9	\$500,000 to \$1 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	1 to 4	\$1 to \$2.5 MILLION
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	1 to 4	\$1 to \$2.5 MILLION
Malt Beverages	2082	BREW MASTER INC	JEFFERSON CITY	COLE		1 to 4	\$500,000 to \$1 MILLION
Malt Beverages	2082	HERMANN BREWING CO	HERMANN	GASCONADE		1 to 4	\$1 to \$2.5 MILLION
Malt Beverages	2082	LEMP BREWERY	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	1 to 4	\$500,000 to \$1 MILLION
Malt Beverages	2082	O'FALLON BREWERY	O FALLON	ST CHARLES	ST LOUIS, MO-IL	1 to 4	\$2.5 to \$5 MILLION
Malt Beverages	2082	SCHLAFLY BEER	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	1 to 4	\$1 to \$2.5 MILLION
Macaroni and Spaghetti	2098	VOCCI'S ITALIAN FOOD PRODUCTS	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	1 to 4	\$500,000 to \$1 MILLION
Clay Refractories	3255	HARBISON WALKER REFRACTORIES	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	1 to 4	\$500,000 to \$1 MILLION
Clay Refractories	3255	NATIONAL REFRACTORIES & MNRLS	MEXICO	AUDRAIN		1 to 4	\$500,000 to \$1 MILLION
Lime	3274	BEGGS AGRICULTURE LIME	JACKSON	CAPE GIRARDEAU		1 to 4	\$1 to \$2.5 MILLION
Lime	3274	MIDWEST MINERALS INC	JASPER	JASPER	JOPLIN, MO	1 to 4	LESS THAN \$500,000
Automatic Merchandising Machine	3581	TECHNIK MANUFACTURING	COLUMBIA	BOONE	COLUMBIA, MO	1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	AGRIALLIANCE	CARDWELL	DUNKLIN		1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	ALCIDE FOOD SAFETY INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	GRAND RIVER AGRICULTURE	PATTONSBURG	DAVISS		1 to 4	LESS THAN \$500,000
Grass Seeds	0139	GRAZING ACRES INC	GALT	GRUNDY		1 to 4	LESS THAN \$500,000
Grass Seeds	0139	HEARTLAND AGRICULTURE	CALHOUN	HENRY		1 to 4	LESS THAN \$500,000
Grass Seeds	0139	MONSANTO CO	OWENSVILLE	GASCONADE		1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	PROFESSIONAL AG SVC INC	DEARBORN	PLATTE	KANSAS CITY, MO-KS	1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	SHO-NEFF PLANTATION	EL DORADO SPGS	CEDAR		1 to 4	LESS THAN \$500,000
Grass Seeds	0139	UNITED AGRI PRODUCTS CO	DEXTER	STODDARD		1 to 4	\$500,000 to \$1 MILLION
Grass Seeds	0139	VANZYVERDEN BROTHERS	PLATO	TEXAS		1 to 4	\$500,000 to \$1 MILLION
Malt Beverages	2082	ANHEAUSER BUSCH	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	ANHEUSER-BUSCH INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	AUGUSTA BREWING CO	AUGUSTA	ST CHARLES	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	BOULEVARD BREWING CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	NA	\$20 to \$50 MILLION
Malt Beverages	2082	BUCKNER BREWING CO	CAPE GIRARDEAU	CAPE GIRARDEAU		NA	NA
Malt Beverages	2082	LEMP BREWERY	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	LEMP BREWING CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	NA	NA
Malt Beverages	2082	LITTLE YEOMAN BREWING CO	WILLOW SPRINGS	HOWELL		NA	NA
Malt Beverages	2082	MILLER BREWING CO	KIRKWOOD	ST LOUIS	ST LOUIS, MO-IL	NA	NA

## Emerging Hyper Growth Cluster

Compared to national industry averages, these Missouri industries had:  
 Fast growth in output, employment, compensation and exports.  
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 Below average productivity.

### Economic Competitiveness Variables

#### Emerging Hyper Growth Cluster

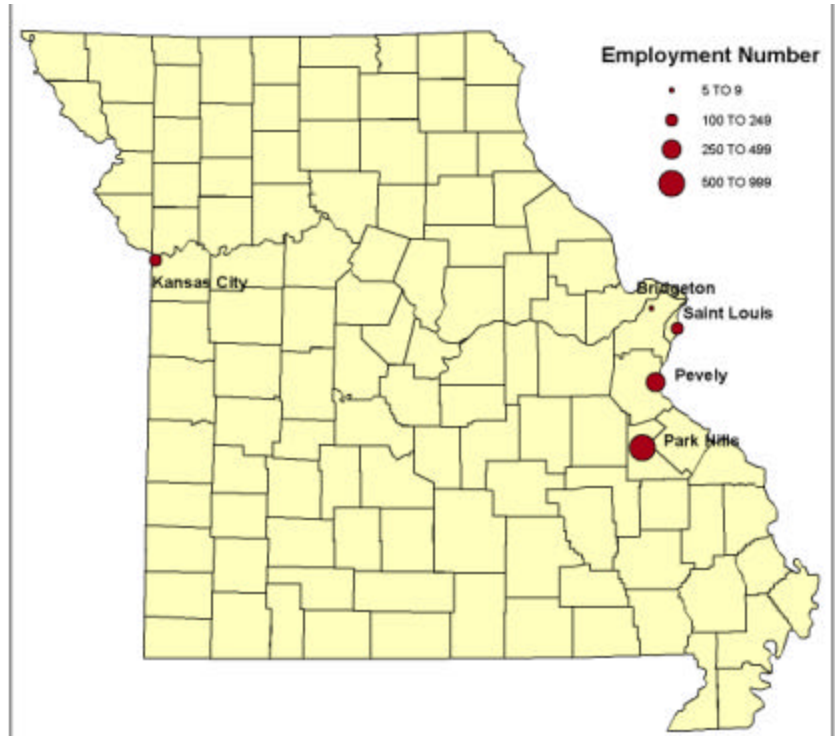
#### Standard Industrial Classification

Glass Containers

3221

Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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### Emerging Hyper Growth

INDUSTRY	SIC	FIRM NAME	CITY	COUNTY	MSA	EMPLOYMENT	SALES
Glass Containers	3221	GLASS GROUP INC	FLAT RIVER	ST FRANCOIS		500 to 999	\$100 to \$500 MILLION
Glass Containers	3221	SAINT-GOBAIN CONTAINERS	PEVELY	JEFFERSON	ST LOUIS, MO-IL	250 to 499	\$50 to \$100 MILLION
Glass Containers	3221	EMPIRE CONTAINER CORP	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	50 to 99	\$10 to \$20 MILLION
Glass Containers	3221	TRICOR BRAUN	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	50 to 99	NA
Glass Containers	3221	FLUORO-SEAL INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$5 to \$10 MILLION
Glass Containers	3221	POGUE LABEL & SCREEN INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$5 to \$10 MILLION
Glass Containers	3221	ANCHOR GLASS CONTAINER CORP	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Glass Containers	3221	OWENS-BROCKWAY PLASTIC PRODS	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Glass Containers	3221	ROUNDS INDUSTRIES INC	BRIDGETON	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Glass Containers	3221	TRICORBRAUN	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Glass Containers	3221	MACY PLASTICS INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	1 to 4	LESS THAN \$500,000

## Emerging Fast Growth Cluster

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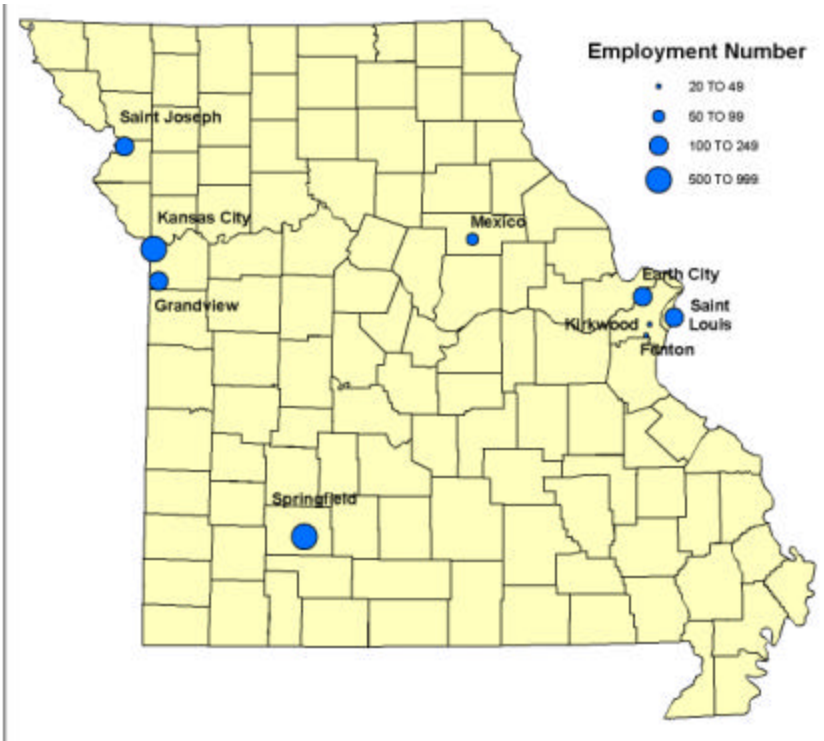
Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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### Emerging Fast Growth Cluster

### Standard Industrial Classification

Soybean Oil Mills	2075
Ammunition, Except For Small Arms, N.E.C.	3483
Machine Tools, Metal Forming Types	3542
Food Products Machinery	3556

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**Emerging Fast Growth**

<b>INDUSTRY</b>	<b>SIC</b>	<b>FIRM NAME</b>	<b>CITY</b>	<b>COUNTY</b>	<b>MSA</b>	<b>EMP SIZE</b>	<b>SALES</b>
Food Products Machinery	3556	PAUL MUELLER CO	SPRINGFIELD	GREENE	SPRINGFIELD, MO	850	\$114,150,000
Food Products Machinery	3556	BUNZL KOCH SUPPLIES	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	250 to 499	\$20 to \$50 MILLION
Soybean Oil Mills	2075	A G PROCESSING INC	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	100 to 249	\$100 to \$500 MILLION
Machine Tools, Metal Forming Types	3542	MITEK INDUSTRIES INC	EARTH CITY	ST LOUIS	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Food Products Machinery	3556	UNIVERSAL DAIRY EQUIPMENT INC	KANSAS CITY	PLATTE	KANSAS CITY, MO-KS	100 to 249	\$20 to \$50 MILLION
Soybean Oil Mills	2075	ADM SOYBEAN PROCESSING	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	50 to 99	\$100 to \$500 MILLION
Soybean Oil Mills	2075	ARCHER DANIELS MIDLAND CO	MEXICO	AUDRAIN		50 to 99	\$100 to \$500 MILLION
Food Products Machinery	3556	CHALLENGE RMF INC	GRANDVIEW	JACKSON	KANSAS CITY, MO-KS	50 to 99	\$10 to \$20 MILLION
Food Products Machinery	3556	RMF STEEL PRODUCTS CO	GRANDVIEW	JACKSON	KANSAS CITY, MO-KS	50 to 99	\$10 to \$20 MILLION
Food Products Machinery	3556	SWING-A-WAY MFG CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	50 to 99	\$10 to \$20 MILLION
Soybean Oil Mills	2075	CARGILL INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$50 to \$100 MILLION
Machine Tools, Metal Forming Types	3542	BECKWOOD CORP	FENTON	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$2.5 to \$5 MILLION
Machine Tools, Metal Forming Types	3542	CUSTOM ROLLFORM PRODUCTS INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$5 to \$10 MILLION
Machine Tools, Metal Forming Types	3542	GROVER MACHINE CO	KIRKWOOD	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$2.5 to \$5 MILLION
Food Products Machinery	3556	NOTHUM MANUFACTURING CO	SPRINGFIELD	GREENE	SPRINGFIELD, MO	20 to 49	\$2.5 to \$5 MILLION
Food Products Machinery	3556	SALVAJOR CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$5 to \$10 MILLION
Machine Tools, Metal Forming Types	3542	ALVA ALLEN INDUSTRIES	CLINTON	HENRY		10 to 19	\$2.5 to \$5 MILLION
Machine Tools, Metal Forming Types	3542	C J SMITH MACHINERY CO	FENTON	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$1 to \$2.5 MILLION
Machine Tools, Metal Forming Types	3542	MAGNUM PRESS AUTOMATION INC	ST CHARLES	ST CHARLES	ST LOUIS, MO-IL	10 to 19	\$2.5 to \$5 MILLION
Food Products Machinery	3556	DEVRO-TEEPAK INC	KANSAS CITY	PLATTE	KANSAS CITY, MO-KS	10 to 19	\$2.5 to \$5 MILLION
Ammunition, Except For Small Arms, N.E.C.	3483	WHITE CO	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Machine Tools, Metal Forming Types	3542	BLUE VALLEY MACHINE & MFG CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	5 to 9	\$1 to \$2.5 MILLION
Food Products Machinery	3556	PAN-GLO	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Machine Tools, Metal Forming Types	3542	DENN USA	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	1 to 4	LESS THAN \$500,000
Machine Tools, Metal Forming Types	3542	L B IND SVC	MEXICO	AUDRAIN		1 to 4	\$500,000 to \$1 MILLION
Machine Tools, Metal Forming Types	3542	SOUTHWEST INDUSTRIAL EQUIPMENT	SPRINGFIELD	GREENE	SPRINGFIELD, MO	1 to 4	LESS THAN \$500,000
Food Products Machinery	3556	DAIRY SYSTEMS INC	MARSHFIELD	WEBSTER	SPRINGFIELD, MO	1 to 4	\$500,000 to \$1 MILLION
Ammunition, Except For Small Arms, N.E.C.	3483	ATK SMALL CALIBER AMMUNITION	INDEPENDENCE	JACKSON	KANSAS CITY, MO-KS	NA	NA
Machine Tools, Metal Forming Types	3542	SOUTHWEST PUNCH PRESS SVC	SPRINGFIELD	GREENE	SPRINGFIELD, MO	NA	NA

## Emerging Moderate Growth Cluster

Compared to national industry averages, these Missouri industries had:  
 Above average specialization in output, employment, compensation and exports.  
 Average growth in output, employment, compensation and exports.  
 Average productivity.

### Economic Competitiveness Variables

Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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### Emerging Moderate Growth Cluster

### Standard Industrial Classification

Feed Grains	0110	
Hay and Pasture	0110	
Dimension Stone	1410	1420
Poultry Processing	2015	
Pickles, Sauces, and Salad Dressings	2035	
Prepared Feeds, N.E.C	2048	
Roasted Coffee	2095	
Textile Bags	2393	
Pleating and Stitching	2395	
Hardwood Dimension and Flooring Mills	2426	
Wood Containers	2441	2449
Wood Pallets and Skids	2448	
Mattresses and Bedsprings	2515	
Metal Partitions and Fixtures	2542	
Furniture and Fixtures, N.E.C	2599	
Bags, Paper	2674	
Sanitary Paper Products	2676	
Envelopes	2677	
Blankbooks and Looseleaf Binders	2782	

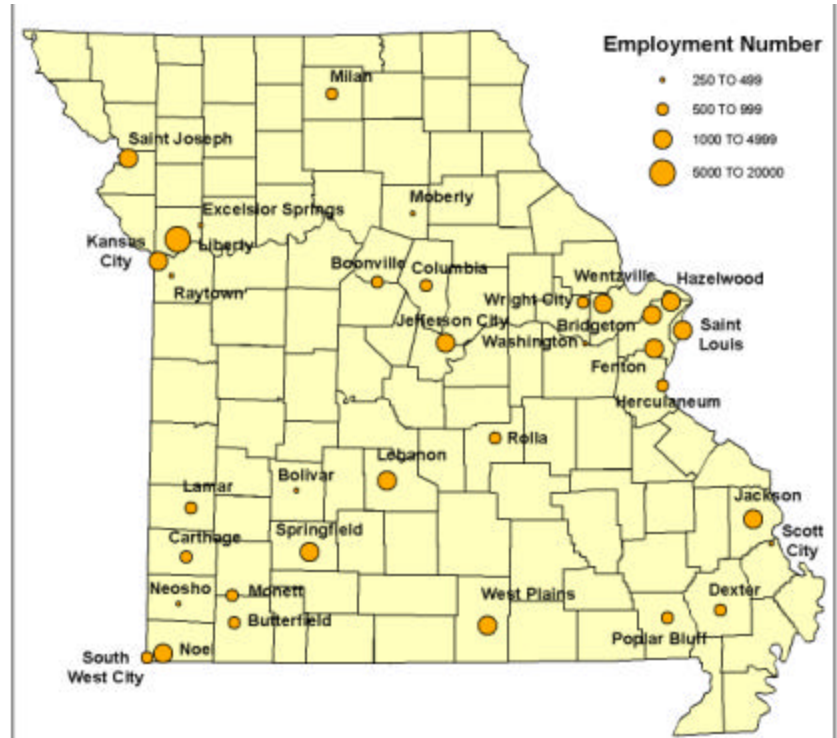


Plate Making	2796	
Explosives	2892	
Paving Mixtures and Blocks	2951	
Asphalt Felts and Coatings	2952	
Rubber and Plastics Hose and Belting	3052	
Leather Tanning and Finishing	3110	
Personal Leather Goods	3172	
Cement, Hydraulic	3240	
Steel Wire and Related Products	3315	
Primary Nonferrous Metals, N.E.C.	3339	
Miscellaneous Fabricated Wire Products	3495	3496
Internal Combustion Engines, N.E.C.	3519	
Welding Apparatus	3548	
Blowers and Fans	3564	
Refrigeration and Heating Equipment	3585	
Transformers	3612	
Communications Equipment N.E.C.	3669	
Motor Vehicles	3711	
Truck Trailers	3715	
Boat Building and Repairing	3732	
Motorcycles, Bicycles, and Parts	3750	
Sporting and Athletic Goods, N.E.C.	3949	
Marking Devices	3953	
Railroads and Related Services	4010	4740
Water Supply and Sewerage Systems	4940	4952
Commercial Sports Except Racing	7941	

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NOTE: High values denoted by ++. Above average values denoted by +. Average values denoted by =. Below average values denoted by -. Low values are denoted by --.

**Emerging Moderate Growth**

<b>INDUSTRY</b>	<b>SIC</b>	<b>FIRM NAME</b>	<b>CITY</b>	<b>COUNTY</b>	<b>MSA</b>	<b>EMP SIZE</b>	<b>SALES</b>
Motor Vehicles	3711	FORD MOTOR CO ASSEMBLY PLANT	LIBERTY	CLAY	KANSAS CITY, MO-KS	5,000 to 9,999	OVER \$1 BILLION
Poultry Processing	2015	TYSON FOODS INC	NOEL	MC DONALD		1,000 to 4,999	\$100 to \$500 MILLION
Sanitary Paper Products	2676	PROCTER & GAMBLE PAPER PRODS	JACKSON	CAPE GIRARDEAU		1,000 to 4,999	\$500 MILLION to \$1 BILLION
Refrigeration and Heating Equipment	3585	HUSSMANN CORP	BRIDGETON	ST LOUIS	ST LOUIS, MO-IL	1,000 to 4,999	OVER \$1 BILLION
Transformers	3612	ABB INCORP	JEFFERSON CITY	COLE		1,000 to 4,999	\$100 to \$500 MILLION
Motor Vehicles	3711	CHRYSLER MOTORS	FENTON	ST LOUIS	ST LOUIS, MO-IL	1,000 to 4,999	OVER \$1 BILLION
Motor Vehicles	3711	FORD MOTOR CO ASSEMBLY PLANT	HAZELWOOD	ST LOUIS	ST LOUIS, MO-IL	1,000 to 4,999	OVER \$1 BILLION
Motor Vehicles	3711	G M WENTZVILLE ASSEMBLY CTR	WENTZVILLE	ST CHARLES	ST LOUIS, MO-IL	1,000 to 4,999	OVER \$1 BILLION
Poultry Processing	2015	CON AGRA FROZEN FOODS	MILAN	SULLIVAN		500 to 999	\$50 to \$100 MILLION
Poultry Processing	2015	GEORGE'S POULTRY PROCESSING	BUTTERFIELD	BARRY		500 to 999	\$100 to \$500 MILLION
Poultry Processing	2015	SIMMONS FOODS INC	SOUTH WEST CITY	MC DONALD		500 to 999	\$100 to \$500 MILLION
Poultry Processing	2015	TYSON FOODS INC	DEXTER	STODDARD		500 to 999	\$100 to \$500 MILLION
Poultry Processing	2015	TYSON FOODS INC	MONETT	BARRY		500 to 999	\$100 to \$500 MILLION
Poultry Processing	2015	WILLOW BROOK FOODS INC	SPRINGFIELD	GREENE	SPRINGFIELD, MO	500 to 999	\$50 to \$100 MILLION
Poultry Processing	2015	WILLOW BROOK FOODS INC	SPRINGFIELD	GREENE	SPRINGFIELD, MO	500 to 999	\$100 to \$500 MILLION
Prepared Feeds, N.E.C	2048	BOEHRINGER INGELHEIM VETMEDICA	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	500 to 999	NA
Wood Containers	2449	INDEPENDENT STAVE CO	LEBANON	LACLEDE		500 to 999	\$20 to \$50 MILLION
Metal Partitions and Fixtures	2542	THORCO INDUSTRIES INC	LAMAR	BARTON		500 to 999	NA
Furniture and Fixtures, N.E.C	2599	AMERIWOOD INDUSTRIES	WRIGHT CITY	WARREN	ST LOUIS, MO-IL	500 to 999	NA
Envelopes	2677	TENSION ENVELOPE CORP	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	500 to 999	\$100 to \$500 MILLION
Rubber and Plastics Hose and Belting	3052	GATES RUBBER CO	POPLAR BLUFF	BUTLER		500 to 999	\$100 to \$500 MILLION
Rubber and Plastics Hose and Belting	3052	MARK IV AUTOMOTIVE	SPRINGFIELD	GREENE	SPRINGFIELD, MO	500 to 999	\$20 to \$50 MILLION
Miscellaneous Fabricated Wire Products	3496	LESCHEN WIRE ROPE CO	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	500 to 999	NA
Internal Combustion Engines, N.E.C.	3519	BRIGGS & STRATTON CORP	ROLLA	PHELPS		500 to 999	\$100 to \$500 MILLION
Blowers and Fans	3564	LOREN COOK CO	SPRINGFIELD	GREENE	SPRINGFIELD, MO	500 to 999	\$100 to \$500 MILLION
Refrigeration and Heating Equipment	3585	NORDYNE INC	BOONVILLE	COOPER		500 to 999	\$100 to \$500 MILLION
Truck Trailers	3715	SYSTEMS & ELECTRONICS INC	WEST PLAINS	HOWELL		500 to 999	\$100 to \$500 MILLION
Boat Building and Repairing	3732	TRACKER MARINE-LEBANON	LEBANON	LACLEDE		500 to 999	\$50 to \$100 MILLION
Commercial Sports Except Racing	7941	HEARNES CENTER	COLUMBIA	BOONE	COLUMBIA, MO	500 to 999	\$100 to \$500 MILLION
Prepared Feeds, N.E.C	2048	PURINA MILLS LLC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	250 to 499	\$500 MILLION to \$1 BILLION
Textile Bags	2393	EAGLE INDUSTRIES UNLIMITED INC	FENTON	ST LOUIS	ST LOUIS, MO-IL	250 to 499	\$20 to \$50 MILLION
Hardwood Dimension and Flooring Mills	2426	ARMSTRONG WOOD PRODUCTS	WEST PLAINS	HOWELL		250 to 499	\$20 to \$50 MILLION
Hardwood Dimension and Flooring Mills	2426	HAVCO WOOD PRODUCTS INC	SCOTT CITY	SCOTT		250 to 499	\$50 to \$100 MILLION
Furniture and Fixtures, N.E.C	2599	DUKE MANUFACTURING CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	250 to 499	\$20 to \$50 MILLION
Furniture and Fixtures, N.E.C	2599	FREDMAN BROS MFG	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	250 to 499	\$20 to \$50 MILLION
Bags, Paper	2674	SMURFIT-STONE CONTAINER CORP	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	250 to 499	\$50 to \$100 MILLION
Primary Nonferrous Metals, N.E.C.	3339	DOE RUN CO	HERCULANEUM	JEFFERSON	ST LOUIS, MO-IL	250 to 499	\$100 to \$500 MILLION
Primary Nonferrous Metals, N.E.C.	3339	HERCULANEUM LEAD SMELTER	HERCULANEUM	JEFFERSON	ST LOUIS, MO-IL	250 to 499	\$100 to \$500 MILLION
Miscellaneous Fabricated Wire Products	3496	ORSCHELN INDUSTRIES	MOBERLY	RANDOLPH		250 to 499	\$20 to \$50 MILLION
Miscellaneous Fabricated Wire Products	3496	TALBOT INDUSTRIES INC	NEOSHO	NEWTON	JOPLIN, MO	250 to 499	NA
Transformers	3612	PAUWELS TRANSFORMERS INC	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	250 to 499	\$20 to \$50 MILLION

**Emerging Moderate Growth**

Communications Equipment N.E.C.	3669	SECURITY PATROL	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	250 to 499	\$50 to \$100 MILLION
Motor Vehicles	3711	MAGNA INTERIOR SYSTEMS	EXCELSIOR SPGS	CLAY	KANSAS CITY, MO-KS	250 to 499	\$100 to \$500 MILLION
Boat Building and Repairing	3732	LOWE BOATS INC	LEBANON	LACLEDE		250 to 499	NA
Boat Building and Repairing	3732	TRACKER MARINE-BOLIVAR	BOLIVAR	POLK		250 to 499	\$20 to \$50 MILLION
Water Supply and Sewerage Systems	4952	METROPOLITAN ST LOUIS SEWER	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	250 to 499	\$50 to \$100 MILLION
Hardwood Dimension and Flooring Mills	2426	LEGGETT & PLATT INC	CARTHAGE	JASPER	JOPLIN, MO	600	\$4,271,800,000
Blowers and Fans	3564	BHA GROUP HOLDINGS INC	RAYTOWN	JACKSON	KANSAS CITY, MO-KS	300	\$181,529,000
Poultry Processing	2015	COBB-VANTRESS INC	JANE	MC DONALD		100 to 249	\$20 to \$50 MILLION
Poultry Processing	2015	CON AGRA FOODS	LA RUSSELL	JASPER	JOPLIN, MO	100 to 249	\$10 to \$20 MILLION
Pickles, Sauces, and Salad Dressings	2035	HALBEN FOOD MFG CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Prepared Feeds, N.E.C	2048	ADM ALLIANCE NUTRITION	SPRINGFIELD	GREENE	SPRINGFIELD, MO	100 to 249	\$50 to \$100 MILLION
Prepared Feeds, N.E.C	2048	TINDLE MILLS	SPRINGFIELD	GREENE	SPRINGFIELD, MO	100 to 249	\$50 to \$100 MILLION
Hardwood Dimension and Flooring Mills	2426	SMITH FLOORING INC	MOUNTAIN VIEW	HOWELL		100 to 249	\$10 to \$20 MILLION
Wood Pallets and Skids	2448	COOPERATIVE WORKSHOPS INC	SEDALIA	PETTIS		100 to 249	\$20 to \$50 MILLION
Wood Pallets and Skids	2448	LIBLA INDUSTRIES INC	POPLAR BLUFF	BUTLER		100 to 249	\$10 to \$20 MILLION
Wood Pallets and Skids	2448	MADISON COUNTY WOOD PRODUCTS	FREDERICKTOWN	MADISON		100 to 249	\$10 to \$20 MILLION
Metal Partitions and Fixtures	2542	THORCO IND INC	BUTLER	BATES		100 to 249	\$10 to \$20 MILLION
Metal Partitions and Fixtures	2542	TRIAD MANUFACTURING INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Furniture and Fixtures, N.E.C	2599	BRITISH TRADITIONS	GRANDVIEW	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$10 to \$20 MILLION
Furniture and Fixtures, N.E.C	2599	DAWSON FURNITURE CO INC	WEBB CITY	JASPER	JOPLIN, MO	100 to 249	\$10 to \$20 MILLION
Furniture and Fixtures, N.E.C	2599	MULTIPLEX DISPLAY FIXTURE CO	FENTON	ST LOUIS	ST LOUIS, MO-IL	100 to 249	\$10 to \$20 MILLION
Bags, Paper	2674	GATEWAY PACKAGING CO OF MO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$20 to \$50 MILLION
Envelopes	2677	NATIONAL ENVELOPE CORP	EARTH CITY	ST LOUIS	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Blankbooks and Looseleaf Binder	2782	ENDURO BINDERS INC	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Blankbooks and Looseleaf Binder	2782	NATIONAL VINYL PRODUCTS INC	STE GENEVIEVE	STE GENEVIEVE		100 to 249	\$10 to \$20 MILLION
Blankbooks and Looseleaf Binder	2782	SILVANUS PRODUCTS INC	STE GENEVIEVE	STE GENEVIEVE		100 to 249	\$20 to \$50 MILLION
Blankbooks and Looseleaf Binder	2782	TRENDS PRESENTATION PRODUCTS	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Blankbooks and Looseleaf Binder	2782	VIA TEK PUBLISHING SOLUTIONS	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	\$10 to \$20 MILLION
Blankbooks and Looseleaf Binder	2782	VIATECH PUBLISHING SOLUTIONS	SPRINGFIELD	GREENE	SPRINGFIELD, MO	100 to 249	\$20 to \$50 MILLION
Paving Mixtures and Blocks	2951	VANCE BROTHERS	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$50 to \$100 MILLION
Paving Mixtures and Blocks	2951	VANCE BROTHERS INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$10 to \$20 MILLION
Rubber and Plastics Hose and Belting	3052	GATES RUBBER CO	CHARLESTON	MISSISSIPPI		100 to 249	\$20 to \$50 MILLION
Rubber and Plastics Hose and Belting	3052	PARKER-HANNIFIN AUTOMOTIVE	KENNETT	DUNKLIN		100 to 249	\$20 to \$50 MILLION
Rubber and Plastics Hose and Belting	3052	PERMACEL	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	100 to 249	\$20 to \$50 MILLION
Personal Leather Goods	3172	ERIC SCOTT LEATHERS LTD	STE GENEVIEVE	STE GENEVIEVE		100 to 249	\$10 to \$20 MILLION
Personal Leather Goods	3172	HAZEL PRODUCTS GROUP	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	100 to 249	\$5 to \$10 MILLION
Steel Wire and Related Products	3315	ESSEX ELECTRIC	SIKESTON	SCOTT		100 to 249	\$50 to \$100 MILLION
Steel Wire and Related Products	3315	MID-CONTINENT NAIL CORP	POPLAR BLUFF	BUTLER		100 to 249	\$20 to \$50 MILLION

## Emerging Slow Growth Cluster

Compared to national industry averages, these Missouri industries had:  
 Above average specialization in output, employment, compensation and exports.  
 Average growth in output, employment, compensation and exports.  
 Below average productivity.

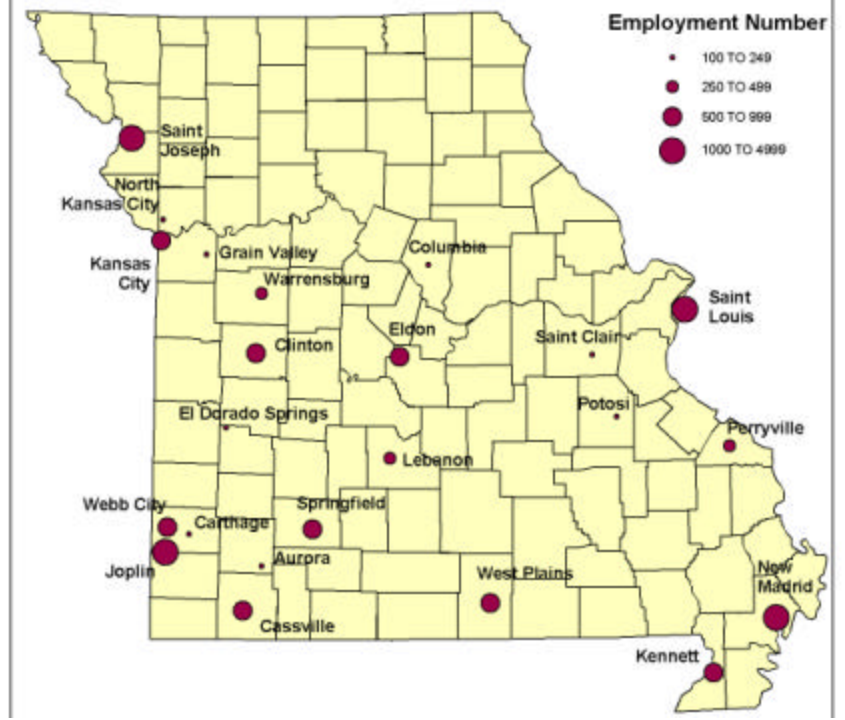
### Economic Competitiveness Variables

Output Specialization	Output Growth	Productivity	Employment Specialization	Employment Growth	Compensation Specialization	Compensation Growth	Export Specialization	Export Growth
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### Emerging Slow Growth Cluster

### Standard Industrial Classification

Ranch Fed Cattle	0212								
Hogs, Pigs and Swine	0213								
Oil Bearing Crops	0116	0119							
Cheese, Natural and Processed	2022								
Condensed and Evaporated Milk	2023								
Cereal Preparations	2043								
Stationery Products	2678								
Polishes and Sanitation Goods	2842								
Gum and Wood Chemicals	2861								
Shoes, Except Rubber	3143	3144							
Leather Gloves and Mittens	3150								
Primary Aluminum	3334								
Industrial Furnaces and Ovens	3567								
Scales and Balances	3596								
Motors and Generators	3621								
Electric Housewares and Fans	3634								
Storage Batteries	3691								
Primary Batteries, Dry and Wet	3692								
Aircraft	3721								



NOTE: High values denoted by ++. Above average values denoted by +. Average values denoted by =. Below average values denoted by -. Low values are denoted by --.



**Emerging Slow Growth**

<b>INDUSTRY</b>	<b>SIC</b>	<b>FIRM NAME</b>	<b>CITY</b>	<b>COUNTY</b>	<b>MSA</b>	<b>EMP SIZE</b>	<b>SALES</b>
Primary Aluminum	3334	NORANDA ALUMINUM INC	NEW MADRID	NEW MADRID		1,000 to 4,999	\$100 to \$500 MILLION
Motors and Generators	3621	EMERSON MOTOR CO	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	1,000 to 4,999	NA
Storage Batteries	3691	EAGLE-PICHER TECHNOLOGIES DIV	JOPLIN	JASPER	JOPLIN, MO	1,000 to 4,999	\$100 to \$500 MILLION
Stationery Products	2678	MEAD PRODUCTS	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	500 to 999	\$100 to \$500 MILLION
Scales and Balances	3596	CARDINAL SCALE MFG CO	WEBB CITY	JASPER	JOPLIN, MO	500 to 999	\$20 to \$50 MILLION
Motors and Generators	3621	EMERSON ELECTRIC CO	KENNETT	DUNKLIN		500 to 999	\$100 to \$500 MILLION
Motors and Generators	3621	FASCO INDUSTRIES INC	CASSVILLE	BARRY		500 to 999	\$100 to \$500 MILLION
Motors and Generators	3621	FASCO MOTORS GROUP	ELDON	MILLER		500 to 999	\$100 to \$500 MILLION
Motors and Generators	3621	MARATHON ELECTRIC MFG CORP	WEST PLAINS	HOWELL		500 to 999	\$100 to \$500 MILLION
Cheese, Natural and Processed	2022	SCHRIEBER FOODS INC	CLINTON	HENRY		250 to 499	\$100 to \$500 MILLION
Cereal Preparations	2043	GILSTER-MARY LEE PACKAGING INC	PERRYVILLE	PERRY		250 to 499	\$100 to \$500 MILLION
Stationery Products	2678	BARTON NELSON INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	250 to 499	\$20 to \$50 MILLION
Industrial Furnaces and Ovens	3567	WEBCO INC	SPRINGFIELD	GREENE	SPRINGFIELD, MO	250 to 499	NA
Motors and Generators	3621	MARATHON MOTOR TECHNOLOGIES GP	LEBANON	LACLEDE		250 to 499	\$20 to \$50 MILLION
Electric Housewares and Fans	3634	HOLMES GROUP-RIVAL DIV	CLINTON	HENRY		250 to 499	NA
Storage Batteries	3691	JOHNSON CONTROLS INC	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	250 to 499	\$100 to \$500 MILLION
Primary Batteries, Dry and Wet	3692	HAWKER ENERGY PRODUCTS INC	WARRENSBURG	JOHNSON		250 to 499	\$5 to \$10 MILLION
Storage Batteries	3691	ENERGIZER HOLDINGS INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	270	\$1,054,700,000
Cereal Preparations	2043	RALCORP HOLDINGS INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	250	\$1,303,600,000
Cheese, Natural and Processed	2022	SCHREIBER FOODS	CLINTON	HENRY		100 to 249	\$100 to \$500 MILLION
Condensed and Evaporated Milk	2023	DAIRY FARMERS OF AMERICA	SPRINGFIELD	GREENE	SPRINGFIELD, MO	100 to 249	\$100 to \$500 MILLION
Condensed and Evaporated Milk	2023	DAIRY FARMERS OF AMERICA INC	EL DORADO SPGS	CEDAR		100 to 249	\$50 to \$100 MILLION
Polishes and Sanitation Goods	2842	BON AMI CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$20 to \$50 MILLION
Polishes and Sanitation Goods	2842	HILLYARD	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	100 to 249	\$50 to \$100 MILLION
Polishes and Sanitation Goods	2842	LIQUID SOAP	GRAIN VALLEY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$20 to \$50 MILLION
Polishes and Sanitation Goods	2842	NATIONAL STARCH & CHEMICAL CO	N KANSAS CITY	CLAY	KANSAS CITY, MO-KS	100 to 249	\$50 to \$100 MILLION
Industrial Furnaces and Ovens	3567	KCI INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	100 to 249	\$20 to \$50 MILLION
Motors and Generators	3621	ECM MOTOR CO	ST CLAIR	FRANKLIN	ST LOUIS, MO-IL	100 to 249	\$50 to \$100 MILLION
Electric Housewares and Fans	3634	TOASTMASTER INC	COLUMBIA	BOONE	COLUMBIA, MO	100 to 249	\$100 to \$500 MILLION
Shoes, Except Rubber	3143	JUSTIN BOOT CO	CARTHAGE	JASPER	JOPLIN, MO	100 to 249	\$20 to \$50 MILLION
Shoes, Except Rubber	3143	JUSTIN BOOT CO	CASSVILLE	BARRY		100 to 249	\$20 to \$50 MILLION
Shoes, Except Rubber	3144	RED WING SHOE CO	POTOSI	WASHINGTON		100 to 249	\$20 to \$50 MILLION
Shoes, Except Rubber	3144	T T GROUP INC	AURORA	LAWRENCE		100 to 249	\$10 to \$20 MILLION
Industrial Furnaces and Ovens	3567	CAMBRIDGE ENGINEERING INC	CHESTERFIELD	ST LOUIS	ST LOUIS, MO-IL	50 to 99	\$10 to \$20 MILLION
Industrial Furnaces and Ovens	3567	NORDYNE	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	50 to 99	\$10 to \$20 MILLION
Motors and Generators	3621	MEGAVOLT	SPRINGFIELD	GREENE	SPRINGFIELD, MO	50 to 99	\$10 to \$20 MILLION
Motors and Generators	3621	MOTOR APPLIANCE CORP	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	50 to 99	\$10 to \$20 MILLION
Polishes and Sanitation Goods	2842	C K ENTERPRISES	LEES SUMMIT	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$20 to \$50 MILLION
Polishes and Sanitation Goods	2842	FAULTLESS STARCH	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$20 to \$50 MILLION
Polishes and Sanitation Goods	2842	LUBAR CHEMICAL CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	NAVY BRAND MANUFACTURING CO	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$10 to \$20 MILLION

### Emerging Slow Growth

Gum and Wood Chemicals	2861	CRAIG INDUSTRIES	SUMMERSVILLE	TEXAS		20 to 49	\$5 to \$10 MILLION
Industrial Furnaces and Ovens	3567	GENERAL AUTOMATIC TRANSFER	FENTON	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$5 to \$10 MILLION
Industrial Furnaces and Ovens	3567	INFRA-RED TECHNOLOGIES INC	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	20 to 49	\$5 to \$10 MILLION
Industrial Furnaces and Ovens	3567	LIQUID ASPHALT SYSTEMS INC	HARRISONVILLE	CASS	KANSAS CITY, MO-KS	20 to 49	\$2.5 to \$5 MILLION
Industrial Furnaces and Ovens	3567	REED OVEN CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$2.5 to \$5 MILLION
Aircraft	3721	AEROSPACE	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	20 to 49	\$5 to \$10 MILLION
Aircraft	3721	SABRELINER CORP	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	20 to 49	\$100 to \$500 MILLION
Shoes, Except Rubber	3144	CAPE SHOE CO	CAPE GIRARDEAU	CAPE GIRARDEAU		20 to 49	\$2.5 to \$5 MILLION
Cereal Preparations	2043	MILNOT HOLDING CORP	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$50 to \$100 MILLION
Stationery Products	2678	N-K SCRATCH PADS INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	BIOSPAN TECHNOLOGIES INC	WASHINGTON	FRANKLIN	ST LOUIS, MO-IL	10 to 19	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	CARE-TECH LABORATORIES	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	CMC PRODUCTS	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	10 to 19	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	COTTO WAXO CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	DIVERSIFIED CHEMICAL PRODUCTS	KANSAS CITY	CLAY	KANSAS CITY, MO-KS	10 to 19	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	HOPE CO	BRIDGETON	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	NOVEL WASH CO INC	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	ODORITE INTERNATIONAL INC	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	10 to 19	\$5 to \$10 MILLION
Polishes and Sanitation Goods	2842	PRICE RESEARCH LTD	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	10 to 19	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	RECKITT BENCKISER	SPRINGFIELD	GREENE	SPRINGFIELD, MO	10 to 19	\$2.5 to \$5 MILLION
Industrial Furnaces and Ovens	3567	RECYCLING SYSTEMS TECHNOLOGY	GREENWOOD	JACKSON	KANSAS CITY, MO-KS	10 to 19	\$1 to \$2.5 MILLION
Industrial Furnaces and Ovens	3567	UNITHERM FURNACE CORP	WENTZVILLE	ST CHARLES	ST LOUIS, MO-IL	10 to 19	\$1 to \$2.5 MILLION
Motors and Generators	3621	AMERICAN MACHINE & GEAR	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$1 to \$2.5 MILLION
Motors and Generators	3621	MIL SPEC INC	FENTON	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$1 to \$2.5 MILLION
Motors and Generators	3621	MOTOR APPLIANCE CORP	CHESTERFIELD	ST LOUIS	ST LOUIS, MO-IL	10 to 19	\$10 to \$20 MILLION
Storage Batteries	3691	B & R IND PRODUCTS INC	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	10 to 19	\$1 to \$2.5 MILLION
Aircraft	3721	ZENITH AIRCRAFT CO	MEXICO	AUDRAIN		10 to 19	\$2.5 to \$5 MILLION
Shoes, Except Rubber	3144	WALK EASY MFG	OWENSVILLE	GASCONADE		10 to 19	\$1 to \$2.5 MILLION
Cheese, Natural and Processed	2022	MORNINGLAND DAIRY CHEESE	MOUNTAIN VIEW	HOWELL		5 to 9	\$2.5 to \$5 MILLION
Stationery Products	2678	W C BISON	WEBSTER GROVES	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Polishes and Sanitation Goods	2842	AWESOME CONCENTRATED CLEANER	ST JOSEPH	BUCHANAN	ST JOSEPH, MO	5 to 9	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	GATEWAY MANUFACTURING INC	IMPERIAL	JEFFERSON	ST LOUIS, MO-IL	5 to 9	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	R & S INDUSTRIES CORP	ST LOUIS	ST LOUIS	ST LOUIS, MO-IL	5 to 9	\$1 to \$2.5 MILLION
Polishes and Sanitation Goods	2842	RITEWAY MAGIC SUPPLY CO	KANSAS CITY	JACKSON	KANSAS CITY, MO-KS	5 to 9	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	SPOT NOT CAR WASH	BLUE SPRINGS	JACKSON	KANSAS CITY, MO-KS	5 to 9	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	SPOT NOT CAR WASH	INDEPENDENCE	JACKSON	KANSAS CITY, MO-KS	5 to 9	\$2.5 to \$5 MILLION
Polishes and Sanitation Goods	2842	Z CO	ST LOUIS	ST LOUIS CITY	ST LOUIS, MO-IL	5 to 9	\$2.5 to \$5 MILLION
Gum and Wood Chemicals	2861	THOMASON CHARCOAL CO	RAYMONDVILLE	TEXAS		5 to 9	\$2.5 to \$5 MILLION

## **ABOUT MERIC AT THE MISSOURI DEPARTMENT OF ECONOMIC DEVELOPMENT**

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The Missouri Economic Research and Information Center (MERIC) at the Missouri Department of Economic Development provides comprehensive analysis of Missouri's socioeconomic environment at the local, regional and state levels. To achieve this, MERIC employs a wide array of analysis tools, which include econometric models, geographic information systems and advanced statistical methods. On-going projects at MERIC include targeted development, economic and social impact assessments, industry and occupational analyses, layoff analyses, and information on Missouri's demographic and economic trends. Coupled with its analysis capability, MERIC is also the U.S. Department of Labor affiliate that maintains a comprehensive labor market database for Missouri. MERIC has current information on employment/unemployment, occupations, wages, layoffs, labor availability, and a variety of other information designed to help understand labor market conditions.

In addition, MERIC has developed an outreach infrastructure which includes a comprehensive web site, e-mail distribution list and monthly newsletter. MERIC's mission is to provide value-added research with a customer focus, which means offering accurate, relevant and timely information to decision makers and the public to facilitate a better understanding of Missouri's socioeconomic environment. Ultimately, MERIC and the rest of the Department of Economic Development strive to make Missouri the best place to live, work, vacation and conduct business.

<http://www.ded.mo.gov>

