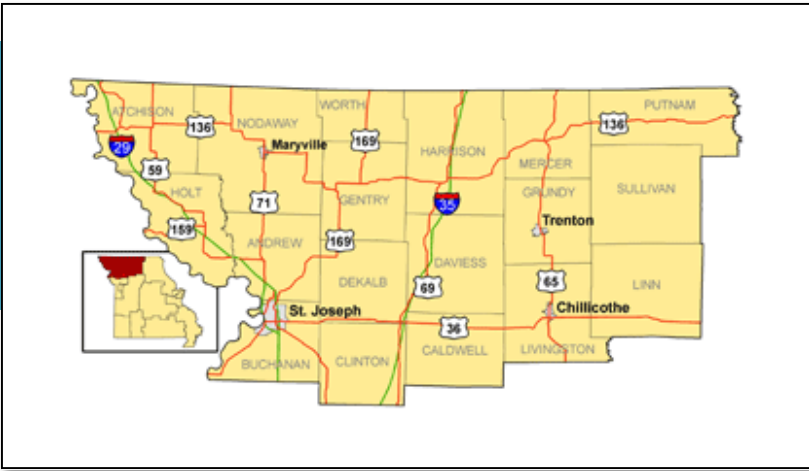


Northwest Region Industry Analysis



The Northwest Region is situated in the northwest corner of the State of Missouri. Counties included in the Northwest Region

are: Andrew, Atchison, Buchanan, Caldwell, Clinton, Daviess, Dekalb, Gentry, Grundy, Harrison, Holt, Linn, Livingston, Mercer, Nodaway, Putnam, Sullivan and Worth.

This region includes several major cities such as St. Joseph, Chillicothe, Trenton and Maryville. Many of Missouri’s major highways cross through this region. Interstate 29 runs through the western part of the region, while Interstate 35 crosses the middle of the region. In addition, Highway 36 and Highway 136 run east/west through the region while Highway 59, Highway 159, Highway 71, Highway 169, Highway 69 and Highway 65 run north/south, allowing a great deal of travel through the area.

Industry Employment Trends 2009 – 2014

The Northwest Region experienced a decline in employment from 2009 to 2014 with a 1.1% loss in employment, while statewide employment grew 2.2% over the same period. Industries with the largest growth were *Hospitals* (20.8%), *Administrative and Support Services* (20.5%), and *Professional Scientific, and Technical Services* (15.7%). Industries with the largest employment loss were *Food Manufacturing* (-31.4%), *Educational Services* (-9.3%), and *Petroleum and Coal Products Manufacturing* (-0.3%). The Health Care industry group had the largest employment growth, while manufacturing industries saw the largest employment loss, with *Food Manufacturing* having the largest impact.

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Total Region Employment	93,671	92,623	-1,048	-1.1%
Educational Services	10,136	9,195	-941	-9.3%
Food Service and Drinking Places	6,724	7,022	298	4.4%
Hospitals	4,167	5,034	867	20.8%
Nursing and Residential Care Facilities	4,762	5,006	244	5.1%
Food Manufacturing	6,789	4,660	-2,129	-31.4%
Justice, Public Order, and Safety Activities	3,799	3,799	0	0%
Ambulatory Health Care Services	3,427	3,701	274	8%
Administrative and Support Services	3,034	3,657	623	20.5%
Petroleum and Coal Products Manufacturing	2,613	2,606	-7	-0.3%
Professional, Scientific, and Technical Services	2,116	2,449	333	15.7%

Industry Wage Trends 2009 – 2014

The Northwest Region had overall wage growth of 15.6%, or over \$4,700, significantly higher than the statewide average of 9.4%. Wage growth occurred across several industry groups especially the health care, service, and production/manufacturing sectors. Industries with the largest wage growth were *Professional, Scientific, and Technical Services* (25.4%), *Specialty Trade Contractors* (25%), and *Hospitals* (21.1%). The industries with the highest wages were *Chemical Manufacturing* (\$94,476), *Heavy and Civil Engineering Construction* (\$62,784), and *Hospitals* (\$54,456).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Overall Region Average Wage	\$30,420	\$35,160	\$4,740	15.6%
Heavy and Civil Engineering Construction	\$52,344	\$62,784	\$10,440	20%
Hospitals	\$44,952	\$54,456	\$9,504	21.1%
Professional, Scientific, and Technical Services	\$37,692	\$47,280	\$9,588	25.4%
Insurance Carriers and Related Activities	\$43,164	\$45,420	\$2,256	5.2%
Ambulatory Health Care Services	\$41,796	\$45,408	\$3,612	8.7%
Specialty Trade Contractors	\$34,236	\$42,804	\$8,568	25%
Merchant Wholesalers, Nondurable Goods	\$35,112	\$39,504	\$4,392	12.5%
Educational Services	\$35,784	\$37,236	\$1,452	4.1%
Truck Transportation	\$33,084	\$36,720	\$3,636	11%
Petroleum and Coal Products Manufacturing	\$31,968	\$35,968	\$3,900	12.2%

Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections, three 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 1,604 more jobs. The industry estimated to have the highest growth is *Administrative and Support Services* (35.8% or 1,103 jobs). *Educational Services* is expected to have the most jobs in 2022, with employment growth of 668 to 9,937 jobs. The only industry expected to have jobs loss is *State Government* with a loss of only 13 jobs.

NAICS Sector	Change	Percent Change
Educational Services	668	7.2%
Food Service and Drinking Places	684	9.9%
Food Manufacturing	258	4.5%
Local Government, Excluding Education and Hospitals	121	2.4%
Hospitals	452	9.9%
Nursing and Residential Care Facilities	469	11.6%
Administrative and Support Services	1,103	35.8%
State Government, Excluding Education and Hospitals	-13	-0.3%
Ambulatory Health Care Services	683	21.5%
General Merchandise Stores	263	8.1%

Industry Clusters and Top Employers

The Northwest Region's highly concentrated industries are in manufacturing, health care/social assistance, and retail 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 *Food Manufacturing* (5.90) and *Chemical Manufacturing* (3.34). The most concentrated retail industry is *Building Material and Garden Equipment and Supplies Dealers* (1.76). Health care's *Hospitals* and *Nursing and Residential Care Facilities* also have high LQ's and are, therefore, a significant part of the region's economy.

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Food Manufacturing	7.46	5.90
Chemical Manufacturing	2.51	3.34
Nursing and Residential Care Facilities	1.83	1.94
Building Material and Garden Equipment and Supplies Dealers	1.77	1.76
General Merchandise Stores	1.57	1.54
Hospitals	1.22	1.23
Merchant Wholesalers, Nondurable Goods	1.30	1.18
Social Assistance	0.95	1.15
Repair and Maintenance	1.22	1.11
Motor Vehicle and Parts Dealers	1.10	1.09

The Northwest Region top employers are focused in the Advanced Manufacturing and Health Care target industry groups. Large employers in the Advance Manufacturing industry group are **Triumph Food, Smithfield Farmland, Hillshire Brands, and ConAgra Foods**. The large employers in the Health Care industry group are **Heartland Regional Medical Center** and **Cameron 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 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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