



West Central Region Industry Analysis

The West Central Region is situated in the western portion of the State of Missouri. Counties included in the West Central Region are: Bates, Benton, Carroll, Cedar, Chariton, Henry, Hickory, Johnson, Lafayette, Pettis, St. Clair, Saline and Vernon.

This region includes several major cities such as Warrensburg, Sedalia, Lexington, Clinton and Nevada. Many of Missouri’s major highways cross through this region. Interstate 70 runs through the northern part of the region, while Interstate 49 (formerly Highway 71) is a major north-south thoroughfare. In addition, Highway 50, Highway 54 and Highway 24 cross east/west through the region, while Highway 65 run north/south allowing a great deal of travel through the area.

Industry Employment Trends 2009 – 2014

The West Central Region experienced overall employment growth of 0.7% from 2009 to 2014, which is lower than the statewide employment growth of 2.2%. Industries with the largest employment growth were *Administrative and Support Services* (42%), *Food Services and Drinking Places* (7.4%), and *Professional, Scientific, and Technical Services* (5.1%). The health care industry group had the highest employment totaling 13,674 jobs. Five industries had declining employment during the time period: *Social Assistance* (-42.1%), *Food Manufacturing* (-8.3%), *General Merchandise Stores* (-7.9%), *Nursing and Residential Care Facilities* (-1%), and *Educational Services* (-0.5%).

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Total Region Employment	81,834	82,441	607	0.7%
Educational Services	9,733	9,687	-46	-0.5%
Food Services and Drinking Places	6,006	6,448	442	7.4%
Nursing and Residential Care Facilities	6,125	6,066	-59	-1.0%
Hospitals	4,688	4,743	55	1.2%
Social Assistance	6,125	3,549	-2,576	-42.1%
Food Manufacturing	3,646	3,342	-304	-8.3%
Ambulatory Health Care Services	2,742	2,865	123	4.5%
General Merchandise Stores	2,609	2,403	-206	-7.9%
Administrative and Support Services	1,630	2,315	685	42%
Professional, Scientific, and Technical Services	1,785	1,876	91	5.1%

Industry Wage Trends 2009 – 2014

The West Central Region saw overall wages increase by 9.5%, or over \$2,600, slightly higher than the statewide wage growth of 9.4%. Wage growth was especially pronounced in the production/manufacturing industry group especially in the *Heavy and Civil Engineering Construction* (47.3%), *Fabricated Metal Product Manufacturing* (16.6%), and *Chemical Manufacturing* (13.9%) industries. Other Industries with large wage growth were, *Merchant Wholesalers, Durable Goods* (27.9%), *Hospitals* (26.2%), and *Professional Scientific, and Technical Service* (21.4%).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Overall Region Average Wage	\$28,296	\$30,984	\$2,688	9.5%
Utilities	\$68,220	\$68,832	\$612	1.0%
Chemical Manufacturing	\$56,892	\$64,788	\$7,896	13.9%
Heavy and Civil Engineering Construction	\$36,000	\$53,016	\$17,016	47.3%
Hospitals	\$40,296	\$50,832	\$10,536	26.2%
Merchant Wholesalers, Durable Goods	\$34,860	\$44,568	\$9,708	27.9%
Fabricated Metal Product Manufacturing	\$33,852	\$39,468	\$5,616	16.6%
Educational Services	\$39,240	\$39,240	\$0	0%
Professional, Scientific, and Technical Services	\$31,956	\$38,808	\$6,852	21.4%
Machinery Manufacturing	\$34,800	\$38,700	\$3,900	11.2%
Credit Intermediation and Related Activities	\$31,428	\$36,960	\$5,532	17.6%

Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections, four industries in the list below are estimated to have double-digit percentage employment growth from 2012 to 2022. The Health Care industry group is expected to have the highest growth specifically *Hospitals* (11.2%), *Nursing and Residential Care Facilities* (13%), and *Ambulatory Health Care Services* (23%). Service-based industries are the other group that is predicted to see large growth as well, with the *Social Assistance* (22.2%), *Food Service and Drinking Places* (11.2%), and *General Merchandise Stores* (9.4%) industries leading the way.

NAICS Sector	Change	Percent Change
Educational Services	876	8.5%
Food Service and Drinking Places	745	11.2%
Local Government, Excluding Education and Hospitals	124	2.4%
Hospitals	464	11.2%
Nursing and Residential Care Facilities	529	13%
Food Manufacturing	204	5.7%
Social Assistance	634	22.2%
General Merchandise Stores	255	9.4%
State Government, Excluding Education and Hospitals	-11	-0.4%
Ambulatory Health Care Services	520	23%

Industry Clusters and Top Employers

The West Central Region's highly concentrated industries are based in manufacturing and construction industries, 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 industry group is manufacturing, led by *Food Manufacturing* (1.92) and followed by *Chemical Manufacturing* (1.35) and *Fabricated Metal Product Manufacturing* (1.17). Construction industries are a major part of the economy led by *Construction of Buildings* (2.35) and followed by *Heavy and Civil Engineering Construction* (2.08) and *Specialty Trade Contractors* (2.00).

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Utilities	1.69	2.40
Nursing and Residential Care Facilities	2.29	2.39
Heavy and Civil Engineering Construction	0.86	2.08
Specialty Trade Contractors	0.84	2.00
Food Manufacturing	4.82	1.92
Chemical Manufacturing	0.20	1.35
General Merchandise Stores	1.50	1.38
Fabricated Metal Product Manufacturing	1.93	1.17
Machinery Manufacturing	2.40	1.16
Merchant Wholesalers, Durable Goods	0.75	0.92

The West Central Region's top employers are in the Advanced Manufacturing industry group. *Food Manufacturing* companies in the region are **Tyson Foods**, **ConAgra Foods**, and **Cargill Meat** and are some of the largest employers. Other manufacturers in the region are **3M** (*Plastics and Rubber Products Manufacturing*), **Stahl Specialty Co** (*Primary Metal Manufacturing*), and **Maxion Wheels** (*Transportation Equipment Manufacturing*). **Whiteman Air Force Base** is the largest employer in the region.

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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