



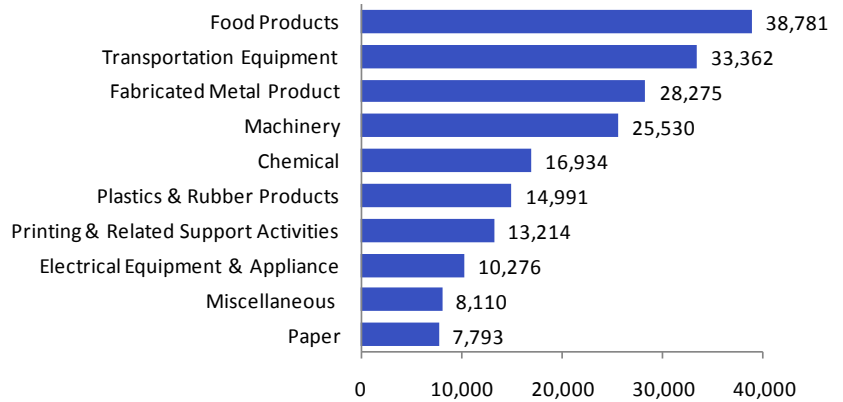
Missouri Economic Impact Brief MANUFACTURING INDUSTRIES

Manufacturing is a major component of Missouri's economy, contributing \$63 billion, in direct and indirect benefits, towards the 2010 gross state product.

Food Products is the sector's top employing industry for a second consecutive year. Transportation Equipment, Fabricated Metals, Machinery and Chemical Manufacturing roundout the sector's top five employers.

Missouri is home to 7,017 manufacturing firms, which collectively employ 243,140 workers. Manufacturing employment represents 9.4 percent of the total employment in Missouri. Manufacturing wages, for 2010, totaled \$12 billion, or 11.4 percent of all Missouri wages paid.

Top Ten Employers in Manufacturing Industries, 2010



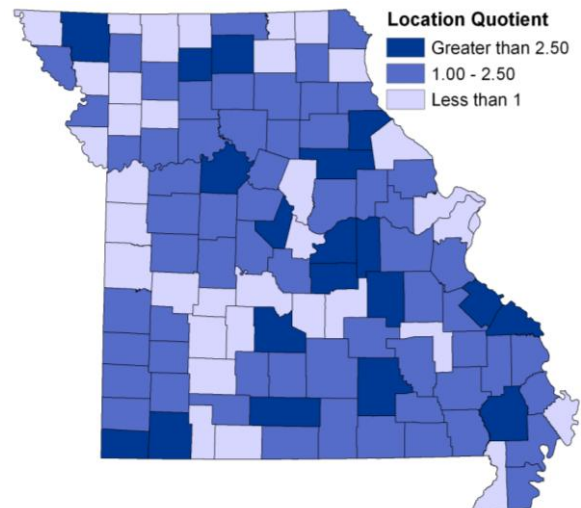
Source: Quarterly Census of Employment and Wages, 2010 Annual Averages

Location Quotient (LQ) measures an area's distribution of industry employment relative to the total employment, and compared to a base area's distribution. Missouri, with an LQ of 1.05, has a greater share of its workers employed in the manufacturing sector than the nation as a whole. Approximately two thirds (77) of Missouri's counties have an LQ over one, demonstrating a greater specialization in manufacturing compared to the nation.

Manufacturing Facts



Manufacturing Location Quotient



MANUFACTURING INDUSTRIES

Economic Impacts

Manufacturing industries have important direct and indirect economic influences on Missouri's economy. Direct impacts are due to employment in manufacturing firms. Indirect economic benefits are realized through industries that supply raw materials to the manufacturing sector, and businesses that provide goods and services to industry workers.

Economic Impact Analysis of 2010 Manufacturing for Missouri

| | Direct | Indirect | Total |
|----------------------|----------------|----------------|----------------|
| Employment | 243,140 | 398,977 | 642,117 |
| Labor Income* | \$16.5 Billion | \$18.6 Billion | \$35.1 Billion |
| Gross State Product* | \$30.9 Billion | \$32.1 Billion | \$63.0 Billion |

*All figures in 2010 Dollars. Source: Minnesota IMPLAN Group, Inc.

Employment Impacts

The Manufacturing sector employed 243,140 workers in 2010. Industries that support manufacturing or benefit from worker spending (indirect impacts), employed an additional 398,977 workers. With a total of 642,117 working for, or supported by, manufacturing, the employment multiplier for this industry is 2.6.

Labor Income

Manufacturing workers earned an average annual salary of \$49,307, which is 21.8 percent more than the state average wage across all industries. Manufacturing firms paid \$16.5 billion in income, which includes wages and benefits, representing 47 percent of the total \$35.1 billion in direct and indirect pay.

Gross State Product

Gross State Product takes into account employee compensation, profits and indirect business taxes. Manufacturing and indirect industries together added \$63 billion, or a quarter of Missouri's 2010 gross state product (\$244 billion).

In terms of value added per manufacturing worker, each direct employee contributed \$127,087 towards the gross state product of Missouri.

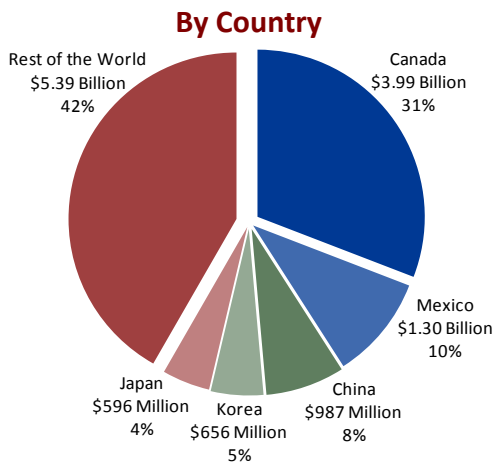


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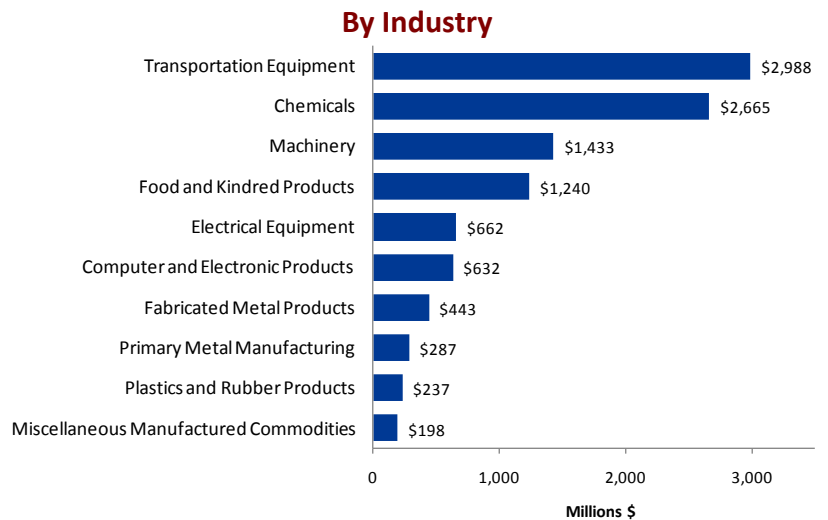
Manufacturing Exports

Missouri's exports for 2010 totaled \$12.9 billion, an increase of over 35 percent from the 2009 total. Manufacturing exports account for 89 percent of the total export dollars. The top two industries producing exports were Transportation Equipment and Chemicals. Transportation Equipment saw a 50 percent gain over 2009, which was driven by a 94 percent increase in aerospace exports. Gains in the Chemical Manufacturing industry were due in large part to a 57 percent increase in basic chemicals exports.

Top Missouri Manufacturing Exports in 2010



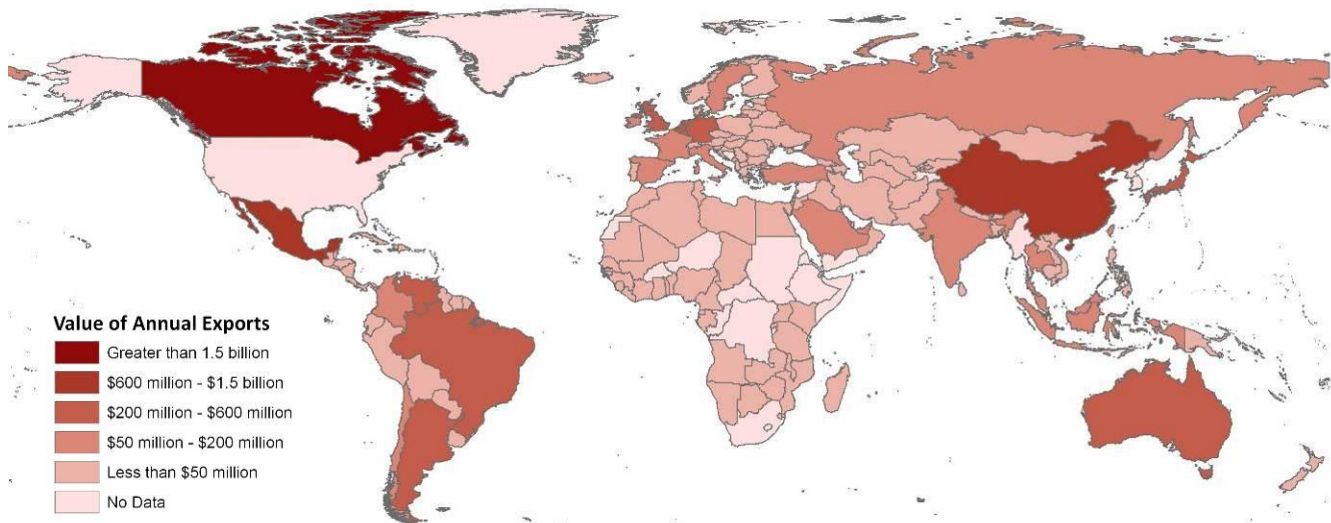
Source: Missouri Exports Annual 2010 Data, WISER Trade Database



Source: Missouri Exports Annual 2010 Data, WISER Trade Database

The top ten country destinations for Missouri exports received over \$2 billion of manufactured goods in 2010. Among them Korea and Belgium each saw over 100 percent growth in amounts received, followed third by Singapore with a 96 percent increase in Missouri imports.

Missouri Manufacturing Exports to the World in 2010



MANUFACTURING INDUSTRIES

Notes:

Employment numbers were obtained from the Quarterly Census of Employment and Wages, 2010, Bureau of Labor Statistics. Industries are classified into the North American Industry Classification System (NAICS).

Location quotients were generated for manufacturing industries using 2010 annual averages from the Regional Data Analysis Tool, Bureau of Labor Statistics.

The economic impact analysis was generated using the Minnesota IMPLAN Group, Inc. model. Indirect effects include both intermediate and induced effects.

2010 Missouri manufacturing export data was obtained from the World Institute for Strategic Economic Research (WISER) Trade database.



NAICS Industry Description

| | |
|-----|----------------------------------|
| 311 | Food Products |
| 312 | Beverage and Tobacco Products |
| 313 | Textile Mills |
| 314 | Textile Product Mills |
| 315 | Apparel |
| 316 | Leather and Allied Products |
| 321 | Wood Products |
| 322 | Paper |
| 323 | Printing |
| 324 | Petroleum and Coal Products |
| 325 | Chemicals |
| 326 | Plastics and Rubber Products |
| 327 | Nonmetallic Mineral Products |
| 331 | Primary Metal |
| 332 | Fabricated Metal Products |
| 333 | Machinery |
| 334 | Computer and Electronic Products |
| 335 | Electrical Equipment |
| 336 | Transportation Equipment |
| 337 | Furniture |
| 339 | Miscellaneous |



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