



St. Louis Region Industry Analysis

The St. Louis Region is situated on the eastern side of Missouri and borders Illinois. The region is comprised of four counties: Franklin, Jefferson, St. Charles, St. Louis, and St. Louis City.

This region includes several major cities such as Arnold, Washington, St. Charles, St. Peters, Florissant, Maplewood and the City of St. Louis. As a major metropolitan area, many of Missouri’s major roads cross through this region, including Interstate 70, Interstate 44, Interstate 55 and Interstate 64, as well as I-170 and I-270. In addition, many highways such as Highway 50, Highway 40, Highway 61 and Highway 67 cross through the region, allowing a great deal of travel through the area.

Industry Employment Trends 2009 – 2014

The St. Louis Region experienced overall employment of 1.8% from 2009 to 2014, which was slightly lower than the statewide employment growth of 2.2%. Industries with the largest employment growth were *Administrative and Support Services* (34%), *Social Assistance* (49.2%), and *Hospitals* (17%). Three industries experienced employment loss: *Specialty Trade Contractors* (-16.8%), *Merchant Wholesalers, Durable Goods Mfg.* (-6.9%), and *Hospitals* (-4.2%). Other industries outside of the top ten with employment growth were *Insurance Carriers and Related Activities* (14.8%) and *Credit Intermediation and Related Activities* (17%).

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Total Region Employment	1,023,113	1,041,597	18,484	1.8%
Food Service and Drinking Places	84,749	89,067	4,318	5.1%
Educational Services	91,408	85,548	-5,860	-6.4%
Administrative and Support Services	68,900	79,914	11,014	16%
Hospitals	55,363	64,753	4,414	17%
Ambulatory Health Care Services	42,262	46,538	9,390	10.1%
Management of Companies and Enterprises	39,903	45,392	4,276	13.8%
Social Assistance	20,145	30,061	5,489	49.2%
Specialty Trade Contractors	35,134	29,217	-5,917	-16.8%
Nursing and Residential Care Facilities	25,427	27,414	1,987	7.8%
Merchant Wholesalers, Durable Goods	27,897	25,977	-1,920	-6.9%

Industry Wage Trends 2009 – 2014

The St. Louis Region saw overall wage growth of 10.6%, or more than \$4,300, from 2009 to 2014, slightly higher than the statewide growth of 9.4%. Industries with the largest wage growth were *Credit Intermediation and Related Activities* (32%), *Chemical Manufacturing* (24%), and *Management of Companies and Enterprises* (21.4%). The industries with the highest wages in 2014 were *Wholesale Electronic Markets and Agents* (\$82,032), *Management of Companies and Enterprises* (\$79,524), and *Chemical Manufacturing* (\$74,424).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Overall Region Average Wage	\$41,040	\$45,384	\$4,344	10.6%
Wholesale Electronic Markets and Agents	\$74,784	\$82,032	\$7,248	9.7%
Management of Companies and Enterprises	\$65,520	\$79,524	\$14,004	21.4%
Chemical Manufacturing	\$60,060	\$74,424	\$14,364	24%
Professional, Scientific, and Technical Services	\$59,592	\$67,752	\$8,160	13.7%
Credit Intermediation and Related Activities	\$48,936	\$64,632	\$15,696	32%
Insurance Carriers and Related Activities	\$60,192	\$64,008	\$3,816	6.3%
Merchant Wholesalers, Nondurable Goods	\$53,676	\$59,028	\$5,352	10%
Merchant Wholesalers, Durable Goods	\$51,972	\$57,288	\$5,316	10.2%
Construction of Buildings	\$49,356	\$56,364	\$7,008	14.2%
Ambulatory Health Care Services	\$51,348	\$55,824	\$4,476	8.7%

Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections, four industries in the list below are estimated to have a double-digit percentage growth in employment from 2012 to 2022. The top three industries projected to have the highest growth by percentage are *Administrative and Support Services* industry (34% or 19,693 more jobs), *Specialty Trade Contractors* (27% or over 7,700 jobs) and *Professional, Scientific, and Technical Services* (21% or over 12,000 jobs). The industries with the highest projected growth are in Health Care and Service industries.

NAICS Sector	Change	Percent Change
Food Service and Drinking Places	5,886	7.2%
Educational Services	4,505	5.7%
Administrative and Support Services	19,693	33.9%
Hospitals	5,605	8.3%
Professional, Scientific, and Technical Services	12,065	20.7%
Ambulatory Health Care Services	8,412	19.7%
Management of Companies and Enterprises	1,530	4.2%
Specialty Trade Contractors	7,727	27%
Local Government, Excluding Education and Hospitals	838	2.4%
Religious, Grant making, Civic, Professional, and Similar Orgs.	760	2.7%

Industry Clusters and Top Employers

The St. Louis Region's highly concentrated industries are divided between service and manufacturing, 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 service industries in the St. Louis Region were *Data Processing, Hosting, and Related Services, Management of Companies and Enterprises, and Wholesale Electronic Markets and Agents*. The most concentrated production/manufacturing industries were *Food Manufacturing, Transportation Equipment Manufacturing, and Chemical Manufacturing*.

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Data Processing, Hosting and Related Services	2.19	2.05
Management of Companies and Enterprises	1.59	1.55
Wholesale Electronic Markets and Agents	1.44	1.50
Truck Transportation	1.48	1.39
Food Manufacturing	1.39	1.35
Hospitals	1.16	1.32
Transportation Equipment Manufacturing	1.28	1.28
Telecommunications	1.17	1.22
Chemical Manufacturing	1.08	1.20
Machinery Manufacturing	1.24	1.18

The St. Louis Region top employers are classified in the state's target industries: Health Care Sciences and Services and Advanced Manufacturing. Large employers in the health care industry include **BJC Health** and **SSM HealthCare**. Several large employers have headquarters in the St. Louis region such as **Monsanto** (*Chemical Manufacturing*), **Express Scripts** (*Health and Personal Care Stores*), **Ameren** (*Utilities*), and **Edward Jones** (*Securities, Commodities Contracts, and Other Financial Investments*). Major employers in the *Professional, Scientific, and Technical Services* industry include **Equifax** and **Maritz**.

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 10,000 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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