

# Phelps County Development Corporation Target Industries Review September 2016

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# Executive Summary

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This study identifies a core set of industries as likely candidates for future retention, expansion, and possible recruitment efforts by Phelps County Economic Development Corporation (PCDC). The area included in the study consists of Phelps plus ten nearby counties. Each of the nearby counties either provides at least two percent of the primary jobs held by Phelps County residents or is the county of residence for at least two percent of workers in Phelps County businesses. Four of the ten counties are either core metropolitan or micropolitan counties and six counties are classified as rural.

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages is used to identify the relative strengths and importance of existing industries and occupations in the study area. Location quotient analysis is used to identify an initial, broad set of industries for further study as possible future drivers of the study area economy. Shift-share analysis for the recent period 2009 to 2015 and projected values for the period 2015 to 2021 is used to identify more detailed, 4-digit North American Industrial Classification (NAICS) code, industries as possible future drivers of the Phelps County economy. Sales to the core industries by other local businesses are compared to exports and this supply chain analysis identifies possible opportunities for local input substitution.

The core industries identified as possible drivers of the area economy in the location quotient analysis are grouped into seven, broad industry groups:

- (1) Animal Production and Related Manufacturing;
- (2) Metal, Metal Products and Machinery Manufacturing;
- (3) All Other Manufacturing;
- (4) Wholesale Trade;
- (5) Transportation and Warehousing;
- (6) Professional, Scientific, and Technical Services; and
- (7) Health Care.

Shift share analysis is used to identify 13 more detailed, 4-Digit NAICS codes industries within the six broad groups, as likely to be highly important to the current and future economic vitality of Phelps County. These 13, 4-digit NAICS industries are:

- (1) Animal Production and Aquaculture;
- (2) Animal Food Manufacturing;
- (3) Animal Slaughtering and Processing;
- (4) Other General Purpose Machinery Manufacturing;
- (5) Other Wood Product Manufacturing;
- (6) Machinery, Equipment, and Supplies Merchant Wholesalers;
- (7) Farm Product Raw Material Merchant Wholesalers;
- (8) Miscellaneous Nondurable Goods Merchant Wholesalers;
- (9) Specialized Freight Trucking;
- (10) Legal Services;
- (11) Management, Scientific, and Technical Consulting Services;
- (12) Offices of Other Health Practitioners; and
- (13) General Medical and Surgical Hospitals.

Additionally, five industries rated as highly important potential targets in the rural counties but not in the core metropolitan and micropolitan counties are identified for possible future study:

- (1) Pharmaceutical and Medicine Manufacturing;
- (2) Motor Vehicle Body and Trailer Manufacturing;
- (3) Aerospace Product and Parts Manufacturing;
- (4) Medical Equipment and Supplies Manufacturing; and
- (5) Accounting, Tax Preparation, Bookkeeping, and Payroll Services.

Industries identified as targets for import substitution are:

- (1) Soil Preparation, Planting, and Cultivating;
- (2) Rail Transportation;
- (3) General Freight Trucking, Local;
- (4) Specialized Freight (except Used Goods) Trucking, Long-Distance; and
- (5) Administrative Management and General Management Consulting Services.

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## **Introduction**

The purpose of this study is to provide Phelps County Economic Development Corporation (PCDC) with information to be used as part of a process to identify industries for future retention, expansion, and possible recruitment efforts. Additional information that may be used in this targeting process includes insights of PCDC and community members plus possible further investigations conducted by PCDC.

This report contains information on the relative sizes and trends, both recent and projected, of area industries and labor forces plus information on interactions between the Phelps County economy and the economies of counties linked to it by commuting patterns. Industries that are key drivers of Phelps County's recent economic growth, that are expected to be future drivers of economic growth, and that appear to have potential to become drivers of the area economy are identified in this study. Also identified are industries that are currently highly important to the area's economic health but may be at risk due to expected declines in overall national employment.

## **Methodology**

U.S. Census Department's Bureau of the Census and Economic Modeling Specialist International (EMSI) are the primary sources of information for this study. EMSI, a private data vendor, collects and analyzes data from a variety of public sources, including the U.S. Census Department, the U.S. Department of Labor, and the U.S. Department of Education. EMSI uses this information to derive estimates of local data suppressed by government agencies to protect proprietary information. Data from EMSI enables a level of analysis that would not be possible in many Nebraska counties due to high levels of data suppression common in areas of relatively small population. NPPD subscribes to EMSI data services and provides this information to wholesale and retail customers as part of its economic development services to these communities.

Data from the U.S. Census Bureau's OnTheMap Application have been used to identify ten counties closely linked to Phelps County based on commuting patterns. Each of these counties either provides at least two percent of the primary jobs held by Phelps County residents or is the residence for at least two percent of workers in Phelps County businesses and is in close geographic proximity to Phelps County.

Four of the ten counties are either core metropolitan or micropolitan counties (Core Metro/Micro). Phelps and the remaining six counties are classified as rural. For the analysis of area industries workforces and labor forces data, the six rural counties are usually combined into a single group (Rural Counties) and information for Phelps County is reported separately. In the analysis of potential key or target industries, information about Phelps County is combined with the other Rural Counties (Phelps Plus Rural Counties).

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages is reported for the Core Metro/Micro Counties, Rural Counties, and Phelps County. This information is used to identify the relative strengths and importance of existing industries and occupations in the Core Metro/Micro Counties and the Phelps Plus Rural Counties groups.

Location quotient analysis, using past, present, and projected future employment, wages and gross regional product, is used to identify an initial, broad set of industries for further study as possible drivers of the study area economy. Shift-share analysis for the periods 2009 to 2015 and 2015 to 2021 is used to classify more detailed, 4-digit North American Industrial Classification (NAICS) code, industries as important drivers of area economies, potential drivers of area economies, important industries with national trends of declining employment and other industries. The other industries group includes businesses that primarily support local population such as retail trade, construction, personal service, plus education and healthcare.

Lastly, sales to key industries and industries identified as having the potential to become key industries by businesses outside the study area are compared to exports by similar local businesses. This supply chain analysis identifies possible opportunities for local input substitution.

## Study Area and Commuting Patterns

The geographic area selected for this study is based on commuting data from the U.S. Census Bureau's OnTheMap Application. As shown in Table One below and Figure One on the following page, 12 counties either provide at least two percent of the primary (highest income) jobs held by Phelps County residents or are the resident county for at least two percent of workers in Phelps County businesses.

As shown in Table One, Phelps County is the location of primary jobs for 2,413 or 61.1 percent of the county's employed residents. The 12 other counties in Table One provide primary jobs for 1,149 or 29.1 percent of Phelps County's employed residents. Also shown in Table One, Phelps County provides 52.6 percent of the workers for primary jobs within the county. The 12 other counties in Table One provide, 1,544 or 33.6 percent of Phelps County primary job workers.

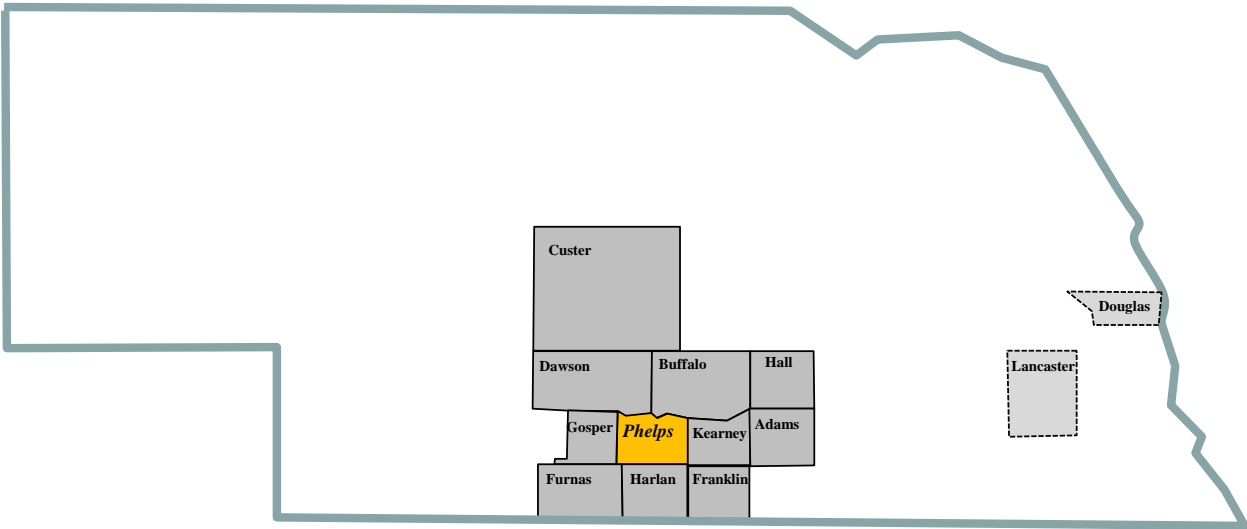
Table One also shows **Phelps County is a large net importer of labor** and has 640 or 16.2 percent more primary jobs within the county than residents working at primary jobs. This suggests compensation paid by Phelps County businesses is relatively high when compared to jobs requiring comparable skills in other counties within the region.

**Table One**  
**Worker Inflows and Resident Outflows 2014**

Nebraska County	Where Phelps County Workers Live		Where Phelps County Residents are Employed	
	Number	Percent	Number	Percent
<b>Phelps</b>	<b>2,413</b>	<b>52.6%</b>	<b>2,413</b>	<b>61.1%</b>
Buffalo	300	6.5%	357	9.0%
Harlan	232	5.1%	38	1.0%
Kearney	178	3.9%	71	1.8%
Dawson	164	3.6%	131	3.3%
Furnas	138	3.0%	44	1.1%
Custer	103	2.2%	10	0.3%
Franklin	102	2.2%	35	0.9%
Gosper	100	2.2%	22	0.6%
Adams	88	1.9%	97	2.5%
Hall	74	1.6%	120	3.0%
Lancaster	39	0.8%	135	3.4%
Douglas	26	0.6%	89	2.3%
All Other	633	13.8%	388	9.8%
<b>Total</b>	<b>4,590</b>	<b>100.0%</b>	<b>3,950</b>	<b>100.0%</b>

Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>

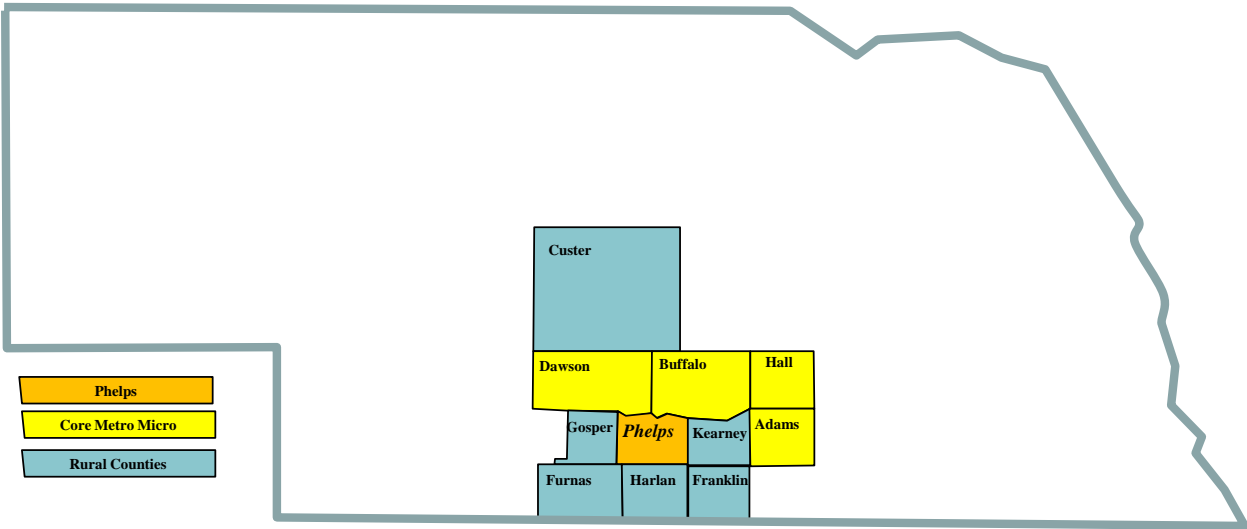
**Figure One**  
**Counties Either Employing at Least Two Percent of Phelps County's Residents or Supplying at Least Two Percent of Phelps County's Workforce**



Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>.

Two of the 12 counties shown in italics in Table One, Lancaster and Douglas, and by dashed boxes in Figure One are geographically separated from Phelps and the other ten counties. After discussions with PCDC staff, Douglas and Lancaster were eliminated from inclusion in the study area. Figure Two shows the final study area for this report.

**Figure Two**  
**Study Area**



Four of the remaining counties in the study (Adams, Buffalo, Dawson, and Hall) are either core metropolitan or micropolitan counties (Core Metro/Micro), with Hall being the lone metropolitan core county. Phelps and the remaining six counties (Custer, Franklin, Furnas, Gosper, Harlan, and Kearney) are classified as rural. For the analysis of area industries, workforces, and labor forces data, the six rural counties are typically combined into a single group (Rural Counties) and information for Phelps County is reported separately. In the analysis of potential key or target industries, information about Phelps County is combined with the other Rural Counties (Phelps Plus Rural Counties).



## Study Area – Labor Force

The size, skills, and recent and projected trends of an area’s labor force are critical to a community’s efforts to retain, grow, and attract businesses offering superior compensation packages. An evaluation of a region’s current and potential employee pool is a critical step in identifying industries that will be a good fit and promote future growth.

The traditional definition of a labor force is the people living within an area, e.g., Phelps County residents, 16-years of age or older that are either working or actively seeking employment. The labor force may work at locations within or outside their area of residence. In addition to the traditional definition of labor force, the U.S. Department of Labor publishes information on discouraged workers and underemployed workers at the state and national levels.

This section provides information on the demographic characteristics of Phelps County’s, Rural Counties’, and Core Metro/Micro Counties’ populations and labor force.

## Population Growth and Components of Growth

Typical of most rural Nebraska counties, both Phelps County and the six Rural Counties have experienced recent population declines while Core Metro/Micro Counties and Nebraska as a whole have experienced population increases. As shown in Table Two, Phelps County’s population declined by 560 people or 5.7 percent from 2000 to 2014. While the county was able to achieve a small natural increase, births minus deaths, of 76 people, net out-migration resulted in the loss of 636 people. This out-migration was equal to 6.5 percent of 2000 population. The six Rural Counties experienced even greater declines with a total population loss of 2,704 or 8.1 percent including a natural decrease of 1,027 and net out-migration of 1,677. **Continued loss of population erodes an area’s tax base, makes it difficult to maintain current employment levels, and places future growth at risk.**

**Table Two**  
**Population Change by Areas and Total 2000–2014**

Area	Population		Population Change 2000–2014		Natural Increase 2000-2014	Net Migration 2000–2014	
	2000	2014	Number	Percent		Number	Percent
<b>Phelps County</b>	<b>9,747</b>	<b>9,187</b>	<b>-560</b>	<b>-5.7</b>	<b>76</b>	<b>-636</b>	<b>-6.5</b>
Rural Counties	33,502	30,798	-2,704	-8.1	-1,027	-1,677	-5.0
Core Metro/Micro	151,309	165,269	13,960	9.2	15,915	-1,955	-1.3
<b>Study Area Total</b>	<b>194,558</b>	<b>205,254</b>	<b>10,696</b>	<b>5.5</b>	<b>14,964</b>	<b>-4,268</b>	<b>-2.2</b>
<b>Nebraska</b>	<b>1,711,263</b>	<b>1,881,503</b>	<b>170,240</b>	<b>9.9</b>	<b>178,301</b>	<b>-8,061</b>	<b>-0.5</b>

Source: U.S. Bureau of the Census, Census of Population, May 2016

When measured by population growth, the Core Metro/Micro Counties performed much better than Phelps County over the period 2000 to 2014 but slightly worse than the state as a whole. During the period 2000 to 2014, Core Metro/Micro County population increased by 13,960 or 9.2 percent, which was slightly less than the 9.9 percent increase for the state as a whole. During the same 14-year period, net out-migration for the Core Micro/Metro Counties was equal to 1.3 percent of 2000 population or more than twice the Nebraska rate of 0.5 percent.

**The close proximity of growing population centers provides both a challenge and an opportunity for Phelps County.** Growing counties provide a potential source of workers to support the expansion of local businesses but also offer a nearby alternative to families considering relocating to another area with similar life styles. **Data from Table One, presented earlier, confirms Phelps County is highly dependent on workers living in other counties to support current and future labor requirements.**

### Population Age Profile

The age distribution of its population is another important factor in assessing the ability of an area to support future business and economic growth. Table Three contains information on the size and distribution of population by study area for important age groups.

As shown in Table Three, the proportion of population in the youngest age group 0 to 14 years of age is relatively similar across all three of the areas and ranges from 19.0 percent for the Rural Counties to 21.3 percent for the Core Metro/Micro Counties. However, the proportion of residents in the oldest age group, 65 Plus, is much higher for Phelps County, 20.3 percent, and the Rural Counties, 21.9 percent, than for the Core Metro/Micro Counties, 14.6 percent. **The age distributions in Table Three suggest much of the out-migration occurring in Phelps County and the Rural Counties occurs among students and families headed by adults in the highly productive age group of 25 to 54 years of age.**

**Table Three**  
**Age Profiles by Areas and Total 2015**

Age Group	Phelps County		Rural Counties		Core Metro/Micro		Study Area Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 to 14	1,849	20.1	5,845	19.0	35,443	21.3	43,137	20.9
15 to 24	1,072	11.7	3,270	10.7	25,655	15.4	29,997	14.5
<b>25 to 54</b>	<b>3,191</b>	<b>34.7</b>	<b>10,098</b>	<b>32.9</b>	<b>60,711</b>	<b>36.5</b>	<b>74,000</b>	<b>35.8</b>
55 to 64	1,212	13.2	4,751	15.5	20,351	12.2	26,314	12.7
65 Plus	1,860	20.3	6,729	21.9	24,387	14.6	32,976	16.0
<b>15 to 64</b>	<b>5,476</b>	<b>59.6</b>	<b>18,118</b>	<b>59.0</b>	<b>106,716</b>	<b>64.1</b>	<b>130,310</b>	<b>63.1</b>
<b>Total</b>	<b>9,184</b>	<b>100.0</b>	<b>30,693</b>	<b>100.0</b>	<b>166,547</b>	<b>100.0</b>	<b>206,424</b>	<b>100.0</b>

Source: U.S. Bureau of the Census, Census of Population, May 2016

As shown in Table Four, Phelps (91.4 percent) and Hall (also 91.4 percent) are the only counties within the study area where the number of jobs exceeds 90.0 percent of local population in the prime working ages of 15 to 64. As noted earlier, Hall is the only core metropolitan county in the study area. **This information confirms the relatively high importance of imported labor to Phelps and Hall counties.** Buffalo County, 85.8 percent, has the third highest ratio of jobs to prime working age population and is a core micropolitan county. The highest jobs to prime working age population ratio in the other Rural Counties is 73.6 percent in Custer County.

**Table Four**  
**2015 Jobs as a Percent of 2014 Population Ages 15 to 64**

County	Jobs 2015	2015 Jobs Percent of 2014 Population	2015 Jobs as a Percent 2014 Population Ages 15 to 64
<b>Phelps</b>	<b>5,007</b>	<b>54.5%</b>	<b>91.4%</b>
Adams	16,205	51.4%	80.7%
Buffalo	27,951	57.4%	85.8%
Custer	4,664	43.6%	73.6%
Dawson	11,933	49.6%	80.5%
Franklin	809	26.6%	45.4%
Furnas	2,135	43.9%	74.5%
Gosper	464	23.8%	40.3%
Hall	35,849	57.6%	91.4%
Harlan	920	26.2%	46.2%
Kearney	2,397	36.1%	60.0%

Sources: U.S. Bureau of the Census, Census of Population, May 2016  
Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

## Population Educational Attainment Profile

An area's ability to support current and future industry expansions and attract new business formations or relocations is heavily dependent on the quality and quantity of workers and their current skill sets. Unfortunately, most of the data on workers' skills is collected from the local workforce, much of which often comes from areas other than the county, e.g., Phelps County, or region being studied. The lack of information about the skills of the resident population makes educational attainment the default metric for evaluation of the potential skills and quality of an area's labor force. This information is often supplemented with interviews of local employers to ascertain the availability and quality of important skills.

As shown in Table Five on the following page, Phelps (94.2 percent of residents 25 years of age and older) and the other rural counties (91.6 percent) have very high percentages of residents with at least a high school diploma. Both of these rural areas exceed the state average of 90.5 percent and the Core Metro/Micro County average of 86.2 percent for this level of attainment.

Phelps County also has a higher percentage of residents aged 25 and over with a bachelor's degree or higher (23.8 percent) than the average of the other rural counties (19.8 percent) and the Core

Metro/Micro Counties (22.4 percent). However, the percent of Phelps County residents aged 25 and over with a graduate or professional degree (5.4 percent) is less than the values for the Core Metro/Micro Counties (7.0 percent) and Nebraska as a whole (9.4 percent).

**Phelps County has a very competitive, rural labor force as measured by educational attainment at the High School and bachelor's degree levels. However, the percent of residents with graduate and professional degrees may limit the county's ability to sustain and compete for some businesses that require a significant number of professional workers.**

**Table Five**  
**Educational Attainment, 2010–2014, 5-Year Estimates**

Category	Phelps County		Rural Counties		Core Metro/Micro		Study Area Total		Nebraska	
	NUM	PER	NUM	PER	NUM	PER	NUM	PER	NUM	PER
Total; Estimate; Population 25 years and over	<b>6,341</b>	<b>100.0</b>	21,825	100.0	102,820	100.0	124,645	100.0	<b>1,205,229</b>	<b>100.0</b>
Less than 9th grade	<b>127</b>	<b>2.0</b>	590	2.7	6,980	6.8	7,570	6.1	<b>49,414</b>	<b>4.1</b>
9th to 12th grade, no diploma	<b>241</b>	<b>3.8</b>	1,246	5.7	7,207	7.0	8,453	6.8	<b>63,877</b>	<b>5.3</b>
High school graduate (includes equivalency)	<b>1,997</b>	<b>31.5</b>	7,727	35.4	31,454	30.6	39,181	31.4	<b>335,054</b>	<b>27.8</b>
Some college, no degree	<b>1,769</b>	<b>27.9</b>	5,526	25.3	24,314	23.6	29,840	23.9	<b>289,255</b>	<b>24.0</b>
Associate's degree	<b>698</b>	<b>11.0</b>	2,407	11.0	9,770	9.5	12,177	9.8	<b>116,907</b>	<b>9.7</b>
Bachelor's degree	<b>1,160</b>	<b>18.3</b>	3,266	15.0	15,856	15.4	19,122	15.3	<b>236,225</b>	<b>19.6</b>
Graduate or professional degree	<b>342</b>	<b>5.4</b>	1,056	4.8	7,238	7.0	8,294	6.7	<b>113,292</b>	<b>9.4</b>
Total; Estimate; High school graduate or higher	<b>5,973</b>	<b>94.2</b>	19,986	91.6	88,632	86.2	108,618	87.1	<b>1,090,732</b>	<b>90.5</b>
Total; Estimate; Bachelor's degree or higher	<b>1,509</b>	<b>23.8</b>	4,325	19.8	23,041	22.4	27,366	22.0	<b>349,516</b>	<b>29.0</b>

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.

## **Income and Poverty**

Information in Table Six suggests that **in addition to being well educated, the Phelps County labor force is relatively well compensated.** The most recent data available from 2014 shows Phelps County median household income, \$51,396, is higher than five of the other six Rural Counties, three of the four Core Metro/Micro Counties, and is 98.1 percent of the state average of \$52,400. Phelps County per capita income \$27,126 is higher than all of the other counties in the study area and 99.2 percent of the state average of \$27,399.

One contributor to the high level of compensation earned by the Phelps County labor force is the large percentage, 64.3 percent, of the population ages 16 to 64 working at least 35 hours per week. This is again the highest of any of the counties in the study and much higher than the state average of 55.2 percent and the national average of 47.1 percent.

One of the benefits of high income levels and high levels of full-time employment is a low poverty level. The percent of people living in poverty in Phelps County, 6.3 percent, is the lowest in the study area and well below the state, 12.9 percent, and national, 15.6 percent, levels. However, **Phelps County's high compensation levels suggests low wage businesses may struggle to find workers.**

**Table Six**  
**Income, Poverty Rates, and Hours Worked by County, Areas and Total**

Area	Median household income in the past 12 months (in 2014 Inflation-adjusted dollars)	Per capita income in the past 12 months (in 2014 Inflation-adjusted dollars)	Percentage of all persons living below poverty level	Percent of 16 to 64 years; that usually worked 35 or more hours per week – 50 to 52 weeks
<b>Phelps</b>	<b>51,396</b>	<b>27,126</b>	<b>6.3</b>	<b>64.3</b>
<b>Rural Counties</b>				
Custer	44,336	26,105	11.5	58.2
Franklin	45,707	26,349	14.5	54.2
Furnas	40,765	22,554	16.9	60.2
Gosper	50,063	24,856	7.6	61.3
Harlan	46,859	24,417	11.8	57.9
Kearney	55,670	26,991	5.9	59.7
<b>Core Metro/Micro</b>				
Adams	51,342	27,001	11.8	54.4
Buffalo	52,562	25,154	12.3	55.1
Dawson	48,104	21,046	13.9	58.0
Hall	49,178	24,075	15.7	55.6
<b>Nebraska</b>	<b>52,400</b>	<b>27,339</b>	<b>12.9</b>	<b>55.2</b>
<b>United States</b>	<b>53,482</b>	<b>28,555</b>	<b>15.6</b>	<b>47.1</b>

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.

## Study Area – Workforce

While data about an area’s labor force describe the characteristics of local residents, analysis of an area’s workforce provides information about workers at local businesses, regardless of where they live.

**Analysis of workforce data provides insights into the types of businesses that have been and are likely to be successful within a region.** Table Seven below provides information on the relative size as measured by size of 2015 employment, relative compensation paid as indicated by 2015 average earnings inclusive of benefits, and productivity as measured by 2014 gross regional product for very broad categories of Phelps County businesses.

**Table Seven**  
**Phelps County,**  
**2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry**

NAICS	Description	2015 Employment		2015 Average Earnings \$	2014 Gross Regional Product	
		Number	Percent		Level \$1,000	Percent
<b>11</b>	<b>Crop and Animal Production</b>	<b>421</b>	<b>8.4</b>	<b>44,325</b>	<b>75,425</b>	<b>16.8</b>
21	Mining, Quarrying, and Oil and Gas Extraction	<10	NA	NA	3,045	0.7
22	Utilities	24	0.5	104,942	11,497	2.6
23	Construction	254	5.1	53,285	22,786	5.1
<b>31</b>	<b>Manufacturing</b>	<b>800</b>	<b>16.0</b>	<b>71,510</b>	<b>98,881</b>	<b>22.0</b>
<b>42</b>	<b>Wholesale Trade</b>	<b>422</b>	<b>8.4</b>	<b>61,304</b>	<b>58,215</b>	<b>13.0</b>
44	Retail Trade	455	9.1	32,039	23,858	5.3
48	Transportation and Warehousing	84	1.7	64,348	9,619	2.1
11	Information	40	0.8	18,501	1,823	0.4
52	Finance and Insurance	164	3.3	65,987	28,881	6.4
53	Real Estate and Rental and Leasing	<10	NA	NA	3,898	0.9
54	Professional, Scientific, and Technical Services	120	2.4	48,938	9,717	2.2
55	Management of Companies and Enterprises	<10	NA	NA	187	0.0
56	Administrative and Support and Waste Management and Remediation Services	34	0.7	42,360	2,521	0.6
61	Educational Services	26	0.5	25,948	1,260	0.3
62	Health Care and Social Assistance	781	15.6	42,364	36,435	8.1
71	Arts, Entertainment, and Recreation	129	2.6	9,890	2,201	0.5
72	Accommodation and Food Services	243	4.9	14,012	5,427	1.2
81	Other Services (except Public Administration)	181	3.6	21,671	6,630	1.5
90	Government	821	16.4	50,331	46,968	10.5
	<b>Total</b>	<b>5,007</b>	<b>100.0</b>	<b>47,979</b>	<b>449,272</b>	<b>100.0</b>

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

As shown in Table Seven on the previous page, NAICS 11 Crop and Animal Production, NAICS 31 Manufacturing, and NAICS 42 Wholesale Trade account for 32.8 percent, 1,643, of 2015 jobs and 51.8 percent of the 2014 gross regional product in Phelps County. Average Earnings (total compensation) for NAICS 31 Manufacturing, \$71,510, and NAICS 42 Wholesale Trade, \$61,304, are well above the Phelps County average of \$47,979, while average earnings for NAICS 11 Crop and Animal Production, \$44,325, are slightly below.

Table Eight provides the same information as Table Seven for the six Rural Counties in the study area. NAICS 11 Crop and Animal Production, NAICS 31 Manufacturing, and NAICS 42 Wholesale Trade account for 26.7 percent, 3,037, of 2015 jobs, and 48.5 percent of 2014 gross regional product. Average Earnings (total compensation) for NAICS 11 Crop and Animal Production, \$42,663, NAICS 31 Manufacturing, and \$62,833, NAICS 42 Wholesale Trade, \$53,977 are all above the area average, \$41,985.

**Table Eight**  
**Rural Counties, Phelps County Target Study,**  
**2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry**

NAICS	Description	Employment		Average Earnings\$	2014 Gross Regional Product	
		Number	Percent		Level \$	Percent
<b>11</b>	<b>Crop and Animal Production</b>	<b>1,337</b>	<b>11.7</b>	<b>42,663</b>	<b>334,810</b>	<b>28.7</b>
21	Mining, Quarrying, and Oil and Gas Extraction	<10	NA	NA	29,171	2.5
22	Utilities	25	0.2	85,864	15,353	1.3
23	Construction	532	4.7	52,686	63,782	5.5
<b>31</b>	<b>Manufacturing</b>	<b>1,057</b>	<b>9.3</b>	<b>62,833</b>	<b>149,969</b>	<b>12.9</b>
<b>42</b>	<b>Wholesale Trade</b>	<b>643</b>	<b>5.6</b>	<b>53,977</b>	<b>81,196</b>	<b>7.0</b>
44	Retail Trade	1,064	9.3	24,956	47,909	4.1
48	Transportation and Warehousing	260	2.3	71,014	44,265	3.8
51	Information	194	1.7	42,121	27,599	2.4
52	Finance and Insurance	461	4.0	52,911	64,778	5.6
53	Real Estate and Rental and Leasing	29	0.3	33,845	35,410	3.0
54	Professional, Scientific, and Technical Services	259	2.3	43,007	19,779	1.7
55	Management of Companies and Enterprises	72	0.6	91,009	7,642	0.7
56	Administrative and Support and Waste Management and Remediation Services	137	1.2	25,748	9,476	0.8
61	Educational Services	67	0.6	33,457	2,390	0.2
62	Health Care and Social Assistance	1,404	12.3	34,048	59,056	5.1
71	Arts, Entertainment, and Recreation	62	0.5	19,396	2,767	0.2
72	Accommodation and Food Services	574	5.0	12,838	13,812	1.2
81	Other Services (except Public Administration)	313	2.7	21,001	19,682	1.7
90	Government	2,899	25.5	43,227	137,249	11.8
	<b>Total</b>	<b>11,389</b>	<b>100.0</b>	<b>41,985</b>	<b>1,166,092</b>	<b>100.0</b>

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

Table Nine provides the same information as Tables Seven and Eight on employment, average earnings, and gross regional product for the Core Metro/Micro Counties. NAICS 11 Crop and Animal Production, NAICS 31 Manufacturing, and NAICS 42 Wholesale Trade account for 24.0 percent, 22,024, of 2015 jobs, and 36.5 percent of 2014 gross regional product. Average earnings (total compensation) for NAICS 31 Manufacturing, \$52,093, and NAICS 42 Wholesale Trade, \$56,919, are above the area average, \$44,501, while average earnings for NAICS 11 Crop and Animal Production, \$42,661, is slightly below. NAICS 11 Crop and Animal Production accounts for a much smaller share of employment and gross regional products in the Core Metro/Mirco Counties than in Phelps and the other rural counties.

**Table Nine**  
**Core Metropolitan and Micropolitan Counties, Phelps County Target Study,**  
**2015 Employment, 2015 Earnings & 2014 Gross Regional Product by Industry**

NAICS	Description	Employment		Average Earnings \$	2014 Gross Regional Product	
		Number	Percent		Level \$	Percent
<b>11</b>	<b>Crop and Animal Production</b>	<b>1,739</b>	<b>1.9</b>	<b>42,661</b>	<b>311,767</b>	<b>4.4</b>
21	Mining, Quarrying, and Oil and Gas Extraction	73	0.1	60,893	31,825	0.4
22	Utilities	114	0.1	126,803	52,101	0.7
23	Construction	4,414	4.8	50,071	406,344	5.7
<b>31</b>	<b>Manufacturing</b>	<b>16,475</b>	<b>17.9</b>	<b>52,093</b>	<b>1,741,010</b>	<b>24.6</b>
<b>42</b>	<b>Wholesale Trade</b>	<b>3,810</b>	<b>4.1</b>	<b>56,919</b>	<b>536,870</b>	<b>7.6</b>
44	Retail Trade	12,017	13.1	29,531	556,467	7.9
48	Transportation and Warehousing	3,156	3.4	58,200	303,764	4.3
51	Information	771	0.8	48,316	112,283	1.6
52	Finance and Insurance	2,513	2.7	58,855	396,069	5.6
53	Real Estate and Rental and Leasing	602	0.7	39,237	197,169	2.8
54	Professional, Scientific, and Technical Services	2,131	2.3	54,855	181,497	2.6
55	Management of Companies and Enterprises	1,420	1.5	63,145	101,965	1.4
56	Administrative and Support and Waste Management and Remediation Services	3,316	3.6	33,684	166,286	2.3
61	Educational Services	1,117	1.2	26,913	34,511	0.5
62	Health Care and Social Assistance	11,352	12.3	50,991	669,634	9.4
71	Arts, Entertainment, and Recreation	958	1.0	18,792	31,461	0.4
72	Accommodation and Food Services	7,649	8.3	16,307	194,832	2.7
81	Other Services (except Public Administration)	3,781	4.1	23,881	142,332	2.0
90	Government	14,529	15.8	55,360	919,039	13.0
	<b>Total</b>	<b>91,938</b>	<b>100.0</b>	<b>44,501</b>	<b>7,087,227</b>	<b>100.0</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

As shown in Tables Ten and Eleven industries in NAICS 31 Manufacturing and NAICS 42 Wholesale Trade provide good compensation and make up significant portions of the study area economy. Industries in NAICS 11 Crop and Animal Production make up significant portions of the rural portions of the study area economy and provide average or close to average compensation. It is highly likely businesses in these broad categories will be the major sources of future employment growth.



**Table Eleven**  
**Distribution of 2015 Employment, 2015 Average Annual Earnings & Earnings as a Percent of U.S. Average**  
**Phelps County, Rural Counties & Metropolitan/Micropolitan Core Counties**

NAICS	Phelps County			Rural Counties			Core Metropolitan/Micropolitan		
	Percent 2015 Area Employment	Average Earnings	Percent US Earnings	Percent 2015 Area Employment	Average Earnings	Percent US Earnings	Percent 2015 Area Employment	Average Earnings	Percent US Earnings
<b>11 Crop and Animal Production</b>	<b>8.4</b>	<b>44,325</b>	<b>122.4</b>	<b>11.7</b>	<b>42,663</b>	<b>117.8</b>	1.9	42,661	117.8
21 Mining, Quarrying, and Oil and Gas Extraction	NA	NA	NA	NA	NA	NA	0.1	60,893	50.0
22 Utilities	0.5	104,942	77.3	0.2	85,864	63.3	0.1	126,803	93.4
23 Construction	5.1	53,285	79.0	4.7	52,686	78.1	4.8	50,071	74.3
<b>31 Manufacturing</b>	<b>16.0</b>	<b>71,510</b>	<b>90.3</b>	<b>9.3</b>	<b>62,833</b>	<b>79.3</b>	<b>17.9</b>	<b>52,093</b>	<b>65.8</b>
<b>42 Wholesale Trade</b>	<b>8.4</b>	<b>61,304</b>	<b>72.7</b>	<b>5.6</b>	<b>53,977</b>	<b>64.0</b>	<b>4.1</b>	<b>56,919</b>	<b>67.5</b>
44 Retail Trade	9.1	32,039	90.3	9.3	24,956	70.3	13.1	29,531	83.2
48 Transportation and Warehousing	1.7	64,348	103.2	2.3	71,014	113.9	3.4	58,200	93.4
51 Information	0.8	18,501	16.4	1.7	42,121	37.4	0.8	48,316	42.9
52 Finance and Insurance	3.3	65,987	56.6	4.0	52,911	45.4	2.7	58,855	50.5
53 Real Estate and Rental and Leasing	NA	NA	NA	0.3	33,845	54.9	0.7	39,237	63.6
54 Professional, Scientific, and Technical Services	2.4	48,938	47.7	2.3	43,007	41.9	2.3	54,855	53.4
55 Management of Companies and Enterprises	NA	NA	NA	0.6	91,009	66.0	1.5	63,145	45.8
56 Administrative and Support and Waste Management and Remediation Services	0.7	42,360	97.1	1.2	25,748	59.0	3.6	33,684	77.2
61 Educational Services	0.5	25,948	54.5	0.6	33,457	70.3	1.2	26,913	56.5
62 Health Care and Social Assistance	15.6	42,364	75.0	12.3	34,048	60.3	12.3	50,991	90.2
71 Arts, Entertainment, and Recreation	2.6	9,890	23.5	0.5	19,396	46.0	1.0	18,792	44.6
72 Accommodation and Food Services	4.9	14,012	63.0	5.0	12,838	57.7	8.3	16,307	73.3
81 Other Services (except Public Administration)	3.6	21,671	61.6	2.7	21,001	59.7	4.1	23,881	67.9
90 Government	16.4	50,331	70.3	25.5	43,227	60.4	15.8	55,360	77.3
<b>Total</b>	<b>100.0</b>	<b>47,979</b>	<b>75.9</b>	<b>100.0</b>	<b>41,985</b>	<b>66.4</b>	<b>100.0</b>	<b>44,501</b>	<b>70.4</b>

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

## **Major Occupations and Wages**

The composition of occupations, including associated skill levels, employed within a region is determined by the mix of existing industries. An analysis of average area compensation relative to national averages provides information on the relative skill levels and the attractiveness of an area for retention and growth of industries dependent upon specific abilities.

Tables Twelve through Fourteen on the following pages provide information on the number of employees, projected total change in employment between 2015 and 2021, and median hourly earnings for Phelps County, the Rural Counties, and the Core Metro/Micro Counties. These tables also contain a comparison of median hourly earnings by occupation relative to an area's overall average by major occupational group. Table Fifteen on the following pages compares median pay per occupation to the median U.S. pay for each of the areas in the study.

As shown in Tables Twelve through Fifteen, Office and Administrative Support occupations is the largest occupational category when measured by employment in each of the three areas analyzed in this study. This is due to the prevalence of these occupations across virtually all industries. The low absolute and relative average wages for this occupation within the study area, suggest relatively low overall levels of productivity for this occupational group.

Production is the second largest occupational group by employment in Phelps County and the Core Metro/Micro Counties and the fifth largest occupational group in the other Rural Counties. Median pay for production workers ranges from 94.3 percent of the U.S. average in the Core Metro/Micro Counties to 103.4 percent in Phelps County. **This suggests the area contains a large pool of skilled production workers, which is consistent with the presence of a large manufacturing sector.**

The other occupations with area median wages consistently above 90.0 percent of the national average area include Transportation and Materials Moving and Farming, Fishing and Forestry. Industries requiring workers with these skills would also be potential targets for expansion or recruitment.

**Table Twelve**  
**Phelps County, 2016 Employment, 2015 Median Hourly Earnings and**  
**2015–2021 Projected Employment Change and Total Job Openings**  
**by Standard Occupational Category (SOC)**

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change 2015–2021	
		Number	Percent	Hourly \$	Percent Area Average	Employment	Job Openings
11-0000	Management	199	3.9	33.42	200.4	14	47
13-0000	Business and Financial Operations	140	2.7	25.05	150.2	12	37
15-0000	Computer and Mathematical	35	0.7	23.67	141.9	4	NA
17-0000	Architecture and Engineering	59	1.1	28.52	171.0	3	16
19-0000	Life, Physical, and Social Science	34	0.7	22.78	136.6	2	NA
21-0000	Community and Social Service	117	2.3	15.33	91.9	11	28
23-0000	Legal	21	0.4	25.3	151.7	1	NA
25-0000	Education, Training, and Library	295	5.7	19.55	117.2	19	67
27-0000	Arts, Design, Entertainment, Sports, and Media	59	1.1	12.23	73.3	3	17
29-0000	Healthcare Practitioners and Technical	341	6.6	27.38	164.1	40	93
31-0000	Healthcare Support	203	3.9	11.48	68.8	30	51
33-0000	Protective Service	68	1.3	18.76	112.5	4	17
35-0000	Food Preparation and Serving Related	313	6.1	8.77	52.6	29	73
37-0000	Building and Grounds Cleaning and Maintenance	152	3.0	10.35	62.1	12	36
39-0000	Personal Care and Service	164	3.2	9.59	57.5	20	53
41-0000	Sales and Related	453	8.8	14.84	89.0	25	129
43-0000	Office and Administrative Support	704	13.7	13.31	79.8	33	123
<b>45-0000</b>	<b>Farming, Fishing, and Forestry</b>	<b>294</b>	<b>5.7</b>	<b>12.22</b>	<b>73.3</b>	<b>7</b>	<b>71</b>
47-0000	Construction and Extraction	231	4.5	16.48	98.8	17	86
49-0000	Installation, Maintenance, and Repair	288	5.6	18.63	111.7	18	78
<b>51-0000</b>	<b>Production</b>	<b>589</b>	<b>11.5</b>	<b>16.92</b>	<b>101.4</b>	<b>0</b>	<b>141</b>
<b>53-0000</b>	<b>Transportation and Material Moving</b>	<b>348</b>	<b>6.8</b>	<b>14.81</b>	<b>88.8</b>	<b>22</b>	<b>75</b>
<b>Total</b>		<b>5,142</b>	<b>100.0</b>	<b>16.68</b>	<b>100.0</b>	<b>324</b>	<b>1,266</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirteen**  
**Rural Counties, Phelps County Target Study, 2016 Employment, 2015 Median Hourly Earnings and**  
**2015–2021 Projected Employment Change and Total Job Openings**  
**by Standard Occupational Category (SOC)**

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change 2015-2021	
		Number	Percent	Hourly \$	Percent Area Average	Employment	Job Openings
11-0000	Management	481	4.1	31.86	199.2	34	125
13-0000	Business and Financial Operations	327	2.8	24.36	152.3	27	103
15-0000	Computer and Mathematical	80	0.7	22.71	142.0	9	24
17-0000	Architecture and Engineering	93	0.8	27.06	169.2	4	37
19-0000	Life, Physical, and Social Science	89	0.8	21.34	133.5	6	30
21-0000	Community and Social Service	277	2.4	15.25	95.4	26	58
23-0000	Legal	51	0.4	21.7	135.7	2	15
25-0000	Education, Training, and Library	876	7.5	19.52	122.1	57	193
27-0000	Arts, Design, Entertainment, Sports, and Media	147	1.3	12.52	78.3	8	46
29-0000	Healthcare Practitioners and Technical	755	6.5	26.39	165.0	89	172
31-0000	Healthcare Support	421	3.6	11.39	71.2	63	99
33-0000	Protective Service	185	1.6	17.00	106.3	10	49
35-0000	Food Preparation and Serving Related	737	6.3	8.72	54.5	67	188
37-0000	Building and Grounds Cleaning and Maintenance	425	3.6	10.32	64.5	34	107
39-0000	Personal Care and Service	291	2.5	9.62	60.2	37	79
41-0000	Sales and Related	998	8.5	12.91	80.7	55	330
43-0000	Office and Administrative Support	1,622	13.9	12.61	78.9	74	340
<b>45-0000</b>	<b>Farming, Fishing, and Forestry</b>	<b>983</b>	<b>8.4</b>	<b>12.77</b>	<b>79.9</b>	<b>22</b>	<b>266</b>
47-0000	Construction and Extraction	531	4.5	15.20	95.1	40	177
49-0000	Installation, Maintenance, and Repair	539	4.6	18.25	114.1	33	157
<b>51-0000</b>	<b>Production</b>	<b>858</b>	<b>7.3</b>	<b>16.35</b>	<b>102.3</b>	<b>-1</b>	<b>246</b>
<b>53-0000</b>	<b>Transportation and Material Moving</b>	<b>802</b>	<b>6.9</b>	<b>14.38</b>	<b>89.9</b>	<b>51</b>	<b>205</b>
<b>Total</b>		<b>11,682</b>	<b>100.0</b>	<b>15.99</b>	<b>100.0</b>	<b>748</b>	<b>3,061</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Fourteen**  
**Metro/Micro Counties, Phelps County Target Study, 2016 Employment,**  
**2015 Median Hourly Earnings and 2015-2021 Projected Employment Change, & Total Job Openings**  
**by Standard Occupational Category (SOC)**

SOC	Occupation Category	2016 Employment		2015 Median Hourly Earnings		Projected Total Change	
		Number	Percent	Hourly \$	Percent Area Average	2015-2021 Employment	2015-2021 Job Openings
11-0000	Management	2,883	3.1	36.30	216.8	203	703
13-0000	Business and Financial Operations	2,605	2.8	25.54	152.6	217	613
15-0000	Computer and Mathematical	809	0.9	24.25	144.9	97	189
17-0000	Architecture and Engineering	709	0.8	28.39	169.6	34	165
19-0000	Life, Physical, and Social Science	603	0.6	23.50	140.4	44	171
21-0000	Community and Social Service	1,661	1.8	17.19	102.7	158	362
23-0000	Legal	291	0.3	25.53	152.5	16	60
25-0000	Education, Training, and Library	5,507	5.9	22.57	134.8	357	1,104
27-0000	Arts, Design, Entertainment, Sports, and Media	1,027	1.1	13.79	82.4	54	229
29-0000	Healthcare Practitioners and Technical	5,526	6.0	30.52	182.3	658	1,226
31-0000	Healthcare Support	2,746	3.0	12.41	74.1	409	672
33-0000	Protective Service	1,124	1.2	17.51	104.6	62	268
35-0000	Food Preparation and Serving Related	8,190	8.8	9.44	56.4	745	2,218
37-0000	Building and Grounds Cleaning and Maintenance	3,308	3.6	11.10	66.3	269	621
39-0000	Personal Care and Service	2,013	2.2	10.09	60.3	254	542
41-0000	Sales and Related	9,995	10.8	13.08	78.1	562	2,512
43-0000	Office and Administrative Support	12,971	14.0	13.66	81.6	598	2,289
<b>45-0000</b>	<b>Farming, Fishing, and Forestry</b>	<b>1,336</b>	<b>1.4</b>	<b>13.70</b>	<b>81.8</b>	<b>31</b>	<b>298</b>
47-0000	Construction and Extraction	4,125	4.4	16.36	97.7	310	956
49-0000	Installation, Maintenance, and Repair	4,180	4.5	19.31	115.4	263	925
<b>51-0000</b>	<b>Production</b>	<b>12,742</b>	<b>13.7</b>	<b>15.43</b>	<b>92.2</b>	<b>-13</b>	<b>2,587</b>
<b>53-0000</b>	<b>Transportation and Material Moving</b>	<b>7,838</b>	<b>8.4</b>	<b>14.90</b>	<b>89.0</b>	<b>497</b>	<b>1,745</b>
<b>Total</b>		<b>92,789</b>	<b>100.0</b>	<b>16.74</b>	<b>100.0</b>	<b>5,830</b>	<b>20,544</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Fifteen**  
**Employment Distribution, Median Hourly Earnings, and Median Hourly Earnings as a Percent of U.S.**  
**by Standard Occupational Category (SOC), 2016,**  
**Phelps County, Rural Counties, and Core Metro/Micro Counties**

SOC	Occupation Category	Phelps County			Rural Counties			Core Metro/Micro		
		2016 Percent Jobs	2016 Median Pay \$	% US Median Pay	2016 Percent Jobs	2016 Median Pay \$	% US Median Pay	2016 Percent Jobs	2016 Median Pay \$	% US Median Pay
11-0000	Management	3.9	33.42	68.9	4.1	31.86	65.7	3.1	36.30	74.8
13-0000	Business and Financial Operations	2.7	25.05	78.6	2.8	24.36	76.4	2.8	25.54	80.1
15-0000	Computer and Mathematical	0.7	23.67	61.0	0.7	22.71	58.5	0.9	24.25	62.5
17-0000	Architecture and Engineering	1.1	28.52	75.1	0.8	27.06	71.3	0.8	28.39	74.8
19-0000	Life, Physical, and Social Science	0.7	22.78	71.6	0.8	21.34	67.1	0.6	23.5	73.9
21-0000	Community and Social Service	2.3	15.33	73.9	2.4	15.25	73.5	1.8	17.19	82.9
23-0000	Legal	0.4	25.30	57.3	0.4	21.7	49.2	0.3	25.53	57.9
25-0000	Education, Training, and Library	5.7	19.55	82.9	7.5	19.52	82.8	5.9	22.57	95.7
27-0000	Arts, Design, Entertainment, Sports, and Media	1.1	12.23	52.3	1.3	12.52	53.6	1.1	13.79	59.0
29-0000	Healthcare Practitioners and Technical	6.6	27.38	76.7	6.5	26.39	74.0	6.0	30.52	85.5
31-0000	Healthcare Support	3.9	11.48	85.3	3.6	11.39	84.6	3.0	12.41	92.2
33-0000	Protective Service	1.3	18.76	90.6	1.6	17.00	82.1	1.2	17.51	84.6
35-0000	Food Preparation and Serving Related	6.1	8.77	87.2	6.3	8.72	86.7	8.8	9.44	93.9
37-0000	Building and Grounds Cleaning and Maintenance	3.0	10.35	87.2	3.6	10.32	86.9	3.6	11.1	93.5
39-0000	Personal Care and Service	3.2	9.59	85.1	2.5	9.62	85.4	2.2	10.09	89.6
41-0000	Sales and Related	8.8	14.84	92.4	8.5	12.91	80.4	10.8	13.08	81.5
43-0000	Office and Administrative Support	13.7	13.31	81.3	13.9	12.61	77.0	14.0	13.66	83.4
<b>45-0000</b>	<b>Farming, Fishing, and Forestry</b>	<b>5.7</b>	<b>12.22</b>	<b>103.1</b>	<b>8.4</b>	<b>12.77</b>	<b>107.7</b>	<b>1.4</b>	<b>13.70</b>	<b>115.6</b>
47-0000	Construction and Extraction	4.5	16.48	76.0	4.5	15.20	70.1	4.4	16.36	75.5
49-0000	Installation, Maintenance, and Repair	5.6	18.63	88.5	4.6	18.25	86.7	4.5	19.31	91.7
<b>51-0000</b>	<b>Production</b>	<b>11.5</b>	<b>16.92</b>	<b>103.4</b>	<b>7.3</b>	<b>16.35</b>	<b>99.9</b>	<b>13.7</b>	<b>15.43</b>	<b>94.3</b>
<b>53-0000</b>	<b>Transportation and Material Moving</b>	<b>6.8</b>	<b>14.81</b>	<b>95.4</b>	<b>6.9</b>	<b>14.38</b>	<b>92.6</b>	<b>8.4</b>	<b>14.9</b>	<b>95.9</b>
<b>Total</b>		<b>100.0</b>	<b>16.68</b>	<b>78.9</b>	<b>100.0</b>	<b>15.99</b>	<b>75.7</b>	<b>100.0</b>	<b>16.74</b>	<b>79.2</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

## **Analysis of Potential Targets**

As noted in previous sections of this study, the broad industry categories Manufacturing, Wholesale Trade, and Crop and Animal Production make up a large portion of the current Phelps County, Rural Counties, and Core Metro/Micro Counties economies when measured by employment and contribution to gross regional product. Additionally these industries pay from average to well above average wages.

Information in this section provides a more detailed analysis of the industries and sub-industries within the study area. This information is used to assess the suitability of individual industries as potential targets for retention, expansion, and recruitment efforts.

Excluded from this analysis are industries whose growth is highly dependent on local population growth. These include Retail Trade, Construction, Government, and Real Estate and Rental and Leasing. Industries currently employing less than 2.0 percent of the workforce are also excluded as information on these industries is subject to large errors in estimation. Additionally, only industries with average annual total earnings (wages and benefits) of at least \$42,000, just above the average for Rural Counties, are included.

The services provided by Healthcare and Social Assistance establishments in rural areas are often designed to serve local markets. This local market focus typically excludes them from consideration as key drivers of area economies. However, the substantial, regional presence of Phelps Memorial Health Center justifies the inclusion of this sector for further analysis in the study.

## **Location Quotient (LQ) Analysis**

In this section, LQ analysis is used to identify study area industries that have recently and/or are expected to in the future perform better than the national average. Superior performance by area industries indicates the presence of substantial competitive advantages or regional strengths. These advantages and/or strengths, such as access to skilled labor or access or specialized resources, are critical to an industry and provide a rationale for a region's expected future growth.

LQs indicate whether the percentage of total employment<sup>1</sup> by an area industry is greater than the national average ( $LQ > 1$ ), is equal to the national average ( $LQ = 1$ ) or is less than the national average ( $LQ < 1$ ). Industries with a  $LQ > 1$  typically indicate the presence of a comparative advantage, such as a large source of skilled labor or access to specialized transportation linkages.

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<sup>1</sup> In addition to employment, location quotients can be calculated for other factors, such as total sales and taxes. For this report LQs are reported for employment only.

Industries with a LQ>1, experiencing local employment growth, with expected future growth and paying good wages (at least \$42,000 per year) are key to the future growth of a region. Industries with low LQs, but increasing levels of employment and good wages may have the potential to become key drivers of the economy. Industries with a LQ>1 and stable to declining local employment are considered to be mature or declining industries. Mature or declining industries may command significant retention efforts when they employ large numbers of area workers. Other combinations of LQs and growth are typically not of interest and are not considered for further analysis in this study. The criteria used to categorize industries based on their likely potential to drive future growth are summarized in Table Sixteen below.

**Table Sixteen**  
**Initial Classification of Industries by Potential to Drive Local Growth**

<b>Category</b>	<b>LQ</b>	<b>Recent Growth</b>	<b>Projected Growth</b>	<b>Compensation</b>
Key to Future Growth	1+	+	+	>\$42,000
Potential to Drive Future Growth	<1	+	+/-	>\$42,000
Mature or Declining	1+	+/-	+/-	>\$42,000
Not Further Considered	<1	+/-	+/-	> or < \$42,000

Tables Seventeen through Nineteen on the following pages contain information on recent, current, and projected future employment and LQs plus current average total earnings by major industry sector for Phelps County, the other Rural Counties, and the Core Metro/Micro Counties. Similarities in these data for Phelps County and the other Rural Counties justify combining them into a new, single category Phelps Plus Rural Counties for the remainder of this study.

Table Twenty contains information on current LQs, the expected trend in LQ values from 2015 to 2021, the distribution of jobs by industry, and whether or not a broad industry will be considered for further study for Phelps and the Rural Counties and the Core Metro/Micro County areas. Industries are selected for further study if they are classified as Key to Future Growth or as having the Potential to Drive Future Growth using the criteria in Table Sixteen above. The six major industries initially selected for further analysis as shown in Table Twenty are Crop and Animal Production; Manufacturing; Wholesale Trade; Transportation and Warehousing; Professional, Scientific, and Technical Services; plus Health Care and Social Assistance.

Two major industries, Management of Companies and Enterprises along with Health Care and Social Assistance meet the criteria for a potential study target in the Core Metro/Micro Counties but not in Phelps Plus Rural Counties. Management of Companies and Enterprises is not included for further study. Health Care and Social Assistance is retained for further study due to its strong presence in Phelps County. The major industry Finance and Insurance meets the criteria for a potential study target in Phelps and the Rural Counties but not in the Core Metro/Micro Counties and is not included for further study.



**Table Seventeen**  
**Phelps County,**  
**Employment, Employment Percent Change,**  
**Location Quotients, and Average Annual Earnings, 2009–2021, Selected Years**

NAICS	Description	Employment				LQ			Average Earnings 2015
		2009	2015	2021	% Change 2015-2021	2009	2015	2021	
11	Crop and Animal Production	332	421	457	8.6	7.37	8.88	9.23	44,325
21	Mining, Quarrying, and Oil and Gas Extraction	<10	<10	<10	NA	0.05	0.03	0.01	NA
22	Utilities	11	24	19	-20.8	0.53	1.27	0.95	104,942
23	Construction	162	254	339	33.5	0.73	1.12	1.34	53,285
<b>31</b>	<b>Manufacturing</b>	<b>841</b>	<b>800</b>	<b>883</b>	<b>10.4</b>	<b>2.00</b>	<b>1.89</b>	<b>2.10</b>	<b>71,510</b>
<b>42</b>	<b>Wholesale Trade</b>	<b>345</b>	<b>422</b>	<b>469</b>	<b>11.1</b>	<b>1.74</b>	<b>2.09</b>	<b>2.16</b>	<b>61,304</b>
44	Retail Trade	412	455	489	7.5	0.79	0.85	0.85	32,039
48	Transportation and Warehousing	101	84	79	-6.0	0.67	0.51	0.44	64,348
51	Information	35	40	43	7.5	0.35	0.42	0.44	18,501
52	Finance and Insurance	176	164	167	1.8	0.87	0.82	0.78	65,987
53	Real Estate and Rental and Leasing	27	<10	<10	NA	0.37	0.08	0.02	NA
54	Professional, Scientific, and Technical Services	83	120	136	13.3	0.31	0.41	0.40	48,938
55	Management of Companies and Enterprises	56	<10	<10	NA	0.85	0.06	0.01	NA
56	Administrative and Support and Waste Management and Remediation Services	162	34	38	11.8	0.64	0.11	0.11	42,360
61	Educational Services	18	26	31	19.2	0.16	0.21	0.22	25,948
<b>62</b>	<b>Health Care and Social Assistance</b>	<b>697</b>	<b>781</b>	<b>885</b>	<b>13.3</b>	<b>1.21</b>	<b>1.23</b>	<b>1.18</b>	<b>42,364</b>
71	Arts, Entertainment, and Recreation	104	129	159	23.3	1.52	1.75	1.92	9,890
72	Accommodation and Food Services	263	243	226	-7.0	0.66	0.55	0.46	14,012
81	Other Services (except Public Administration)	199	181	176	-2.8	0.95	0.91	0.83	21,671
90	Government	790	821	864	5.2	0.90	0.98	0.99	50,331
	<b>Total</b>	<b>4,816</b>	<b>5,007</b>	<b>5,461</b>	<b>9.1</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>47,979</b>

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Eighteen**  
**Rural Counties, Phelps County Target Study,**  
**Employment, Employment Percent Change,**  
**Location Quotients, and Average Annual Earnings, 2009–2021, Selected Years**

NAICS	Description	Employment				LQ			Average Earnings 2015
		2009	2015	2021	% Change 2015-2021	2009	2015	2021	
<b>11</b>	<b>Crop and Animal Production</b>	<b>1,004</b>	1,337	1,490	<b>11.4</b>	<b>9.88</b>	12.42	<b>13.15</b>	42,663
21	Mining, Quarrying, and Oil and Gas Extraction	<10	<10	<10	NA	0.08	0.03	0.03	NA
22	Utilities	20	25	22	-12.0	0.45	0.57	0.48	85,864
<b>23</b>	<b>Construction</b>	<b>428</b>	532	701	<b>31.8</b>	<b>0.85</b>	1.03	<b>1.21</b>	52,686
<b>31</b>	<b>Manufacturing</b>	<b>819</b>	1,057	1,228	<b>16.2</b>	<b>0.86</b>	1.10	<b>1.28</b>	62,833
42	Wholesale Trade	659	643	671	4.4	1.47	1.40	1.35	53,977
44	Retail Trade	1,046	1,064	1,149	8.0	0.89	0.87	0.87	24,956
48	Transportation and Warehousing	253	260	279	7.3	0.75	0.69	0.68	71,014
51	Information	186	194	219	12.9	0.82	0.90	0.99	42,121
<b>52</b>	<b>Finance and Insurance</b>	<b>426</b>	461	505	<b>9.5</b>	<b>0.93</b>	1.02	<b>1.03</b>	52,911
53	Real Estate and Rental and Leasing	33	29	32	10.3	0.21	0.17	0.18	33,845
54	Professional, Scientific, and Technical Services	206	259	331	27.8	0.34	0.38	0.42	43,007
55	Management of Companies and Enterprises	51	72	90	25.0	0.34	0.42	0.47	91,009
56	Administrative and Support and Waste Management and Remediation Services	144	137	169	23.4	0.25	0.20	0.22	25,748
61	Educational Services	155	67	60	-10.4	0.59	0.23	0.18	33,457
<b>62</b>	<b>Health Care and Social Assistance</b>	<b>1,366</b>	<b>1,404</b>	<b>1,534</b>	<b>9.3</b>	<b>1.05</b>	<b>0.97</b>	<b>0.90</b>	<b>34,048</b>
71	Arts, Entertainment, and Recreation	64	62	62	0.0	0.42	0.37	0.33	19,396
72	Accommodation and Food Services	656	574	568	-1.0	0.73	0.57	0.51	12,838
81	Other Services (except Public Administration)	378	313	297	-5.1	0.80	0.69	0.61	21,001
90	Government	2,971	2,899	3,076	6.1	1.50	1.53	1.54	43,227
	<b>Total</b>	<b>10,871</b>	11,389	12,485	<b>9.6</b>	<b>NA</b>	NA	NA	41,985

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Nineteen**  
**Core Metro/Micro Counties, Phelps County Target Study,**  
**Employment, Employment Percent Change,**

**Location Quotients, and Average Annual Earnings, 2009–2021, Selected Years**

NAICS	Description	Employment				LQ			Average Earnings 2015
		2009	2015	2021	% Change 2015-2021	2009	2015	2021	
11	<b>Crop and Animal Production</b>	<b>1,473</b>	<b>1,739</b>	<b>1,873</b>	<b>7.7</b>	<b>1.78</b>	<b>2.00</b>	<b>2.13</b>	<b>42,661</b>
21	Mining, Quarrying, and Oil and Gas Extraction	81	73	56	-23.3	0.19	0.14	0.11	60,893
22	Utilities	90	114	121	6.1	0.24	0.33	0.35	126,803
<b>23</b>	<b>Construction</b>	<b>4,184</b>	<b>4,414</b>	<b>5,080</b>	<b>15.1</b>	<b>1.02</b>	<b>1.06</b>	<b>1.13</b>	<b>50,071</b>
<b>31</b>	<b>Manufacturing</b>	<b>16,304</b>	<b>16,475</b>	<b>16,712</b>	<b>1.4</b>	<b>2.10</b>	<b>2.12</b>	<b>2.24</b>	<b>52,093</b>
42	Wholesale Trade	3,687	3,810	3,921	2.9	1.01	1.03	1.02	56,919
44	Retail Trade	11,969	12,017	12,448	3.6	1.25	1.22	1.22	29,531
<b>48</b>	<b>Transportation and Warehousing</b>	<b>3,186</b>	<b>3,156</b>	<b>3,375</b>	<b>6.9</b>	<b>1.15</b>	<b>1.04</b>	<b>1.06</b>	<b>58,200</b>
51	Information	973	771	726	-5.8	0.53	0.44	0.42	48,316
52	Finance and Insurance	2,734	2,513	2,437	-3.0	0.73	0.69	0.64	58,855
53	Real Estate and Rental and Leasing	613	602	618	2.7	0.46	0.45	0.44	39,237
54	Professional, Scientific, and Technical Services	1,956	2,131	2,454	15.2	0.40	0.39	0.40	54,855
<b>55</b>	<b>Management of Companies and Enterprises</b>	<b>1,071</b>	<b>1,420</b>	<b>1,676</b>	<b>18.0</b>	<b>0.88</b>	<b>1.03</b>	<b>1.13</b>	<b>63,145</b>
56	Administrative and Support and Waste Management and Remediation Services	2,605	3,316	3,807	14.8	0.55	0.60	0.63	33,684
61	Educational Services	1,215	1,117	1,145	2.5	0.56	0.48	0.45	26,913
<b>62</b>	<b>Health Care and Social Assistance</b>	<b>10,366</b>	<b>11,352</b>	<b>12,537</b>	<b>10.4</b>	<b>0.98</b>	<b>0.97</b>	<b>0.95</b>	<b>50,991</b>
71	Arts, Entertainment, and Recreation	827	958	1,000	4.4	0.66	0.71	0.68	18,792
72	Accommodation and Food Services	7,221	7,649	7,924	3.6	0.99	0.94	0.91	16,307
81	Other Services (except Public Administration)	3,728	3,781	3,904	3.3	0.97	1.03	1.04	23,881
90	Government	14,319	14,529	15,039	3.5	0.89	0.95	0.97	55,360
	<b>Total</b>	<b>88,600</b>	<b>91,938</b>	<b>96,851</b>	<b>5.3</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>44,501</b>

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty**  
**Potential Target Indicators, Location Quotients, Jobs and Income**  
**Combined Phelps and Rural Counties & Core Metro/Micro Counties**

NAICS	Combined Phelps and Rural Counties				Core Metro/Micro Counties			
	2015 LQ & Projected Trend*	2015 Percent Total Jobs	2015 Total Income	Potential Target	2015 LQ & Projected Trend	2015 Percent Total Jobs	2015 Total Income	Potential Target
<b>11 Crop and Animal Production</b>	<b>11.34 +</b>	<b>10.7</b>	<b>43,058</b>	<b>Yes</b>	<b>2 +</b>	<b>1.90</b>	<b>42,661</b>	<b>Yes</b>
21 Mining, Quarrying, and Oil and Gas Extraction	0.03 o	0.0	NA	No	0.14 o	0.10	60,893	No
22 Utilities	0.79 o	0.3	95,100	No	0.33 +	0.10	126,803	No
23 Construction	1.05 +	4.8	52,880	No	1.06 +	4.80	50,071	No
<b>31 Manufacturing</b>	<b>1.34 +</b>	<b>11.3</b>	<b>66,589</b>	<b>Yes</b>	<b>2.12 +</b>	<b>17.90</b>	<b>52,093</b>	<b>Yes</b>
<b>42 Wholesale Trade</b>	<b>1.61 o</b>	<b>6.5</b>	<b>56,899</b>	<b>Yes</b>	<b>1.03 o</b>	<b>4.10</b>	<b>56,919</b>	<b>Yes</b>
44 Retail Trade	0.86 +	9.3	27,084	No	1.22 o	13.10	29,531	No
<b>48 Transportation and Warehousing</b>	<b>0.64 o</b>	<b>2.1</b>	<b>69,363</b>	<b>Yes</b>	<b>1.04 +</b>	<b>3.40</b>	<b>58,200</b>	<b>Yes</b>
51 Information	0.75 +	1.4	38,022	No	0.44 o	0.80	48,316	No
<b>52 Finance and Insurance</b>	<b>0.96 o</b>	<b>3.8</b>	<b>56,268</b>	<b>YES</b>	0.69 o	2.70	58,855	No
53 Real Estate and Rental and Leasing	0.14 o	0.2	32,720	No	0.45 o	0.70	39,237	No
<b>54 Professional, Scientific, and Technical Services</b>	<b>0.39 +</b>	<b>2.3</b>	<b>44,857</b>	<b>Yes</b>	<b>0.39 +</b>	<b>2.30</b>	<b>54,855</b>	<b>Yes</b>
<b>55 Management of Companies and Enterprises</b>	0.31 +	0.5	88,457	No	<b>1.03 +</b>	<b>1.50</b>	<b>63,145</b>	<b>Yes</b>
56 Administrative and Support and Waste Management and Remediation Services	0.17 +	1.0	29,029	No	0.6 +	3.60	33,684	No
61 Educational Services	0.23 o	0.6	31,295	No	0.48 o	1.20	26,913	No
<b>62 Health Care and Social Assistance</b>	<b>1.05 o</b>	<b>13.3</b>	<b>37,027</b>	<b>Phelps Co Only</b>	<b>0.97 o</b>	<b>12.30</b>	<b>50,991</b>	<b>Yes</b>
71 Arts, Entertainment, and Recreation	0.79 +	1.2	12,836	No	0.71 o	1.00	18,792	No
72 Accommodation and Food Services	0.56 o	5.0	13,184	No	0.94 o	8.30	16,307	No
81 Other Services (except Public Administration)	0.75 o	3.0	21,246	No	1.03 +	4.10	23,881	No
90 Government	1.36 +	22.7	44,789	No	0.95 +	15.80	55,360	No

\* Future Trend Symbols: + increasing; o neutral; - decreasing

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

A more detailed analysis of the sub-industries, i.e., 3-Digit NAICS Code industries, within the six major industries selected for study, indicates the need to combine and reorganize some of them into new groups of seven broad categories. Table Twenty-One shows the seven broad industry categories used in the following sections of this study. NAICS 11 Crop and Animal Production is combined with NAICS 31 Food Processing and Agricultural Products Manufacturing to form the new category Crop and Animal Production and Related Manufacturing. NAICS 32 is a new separate category: Metal, Metal Products and Machinery Manufacturing. NAICS 33 is also a new category: All Other Manufacturing. NAICS 621, 622, and 623 form a new category: Health Care. The remaining broad industry categories, NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; and NAICS 54 Professional, Scientific, and Technical Services are the same as the major industries in previous sections of the study.

**Table Twenty-One**  
**Jobs and Percent Area Jobs by Target Industry Group**  
**Phelps and Rural Counties & Core Metro/Micro Counties**

Target Industry Category	Phelps and Rural Counties		Core Metro/Micro	
	Total Jobs	Percent Area Jobs	Total Jobs	Percent Area Jobs
Crop and Animal Production and Related Manufacturing	1,849	11.3	9,568	10.4
Metal, Metal Products and Machinery Manufacturing	295	1.8	4,542	4.9
All Other Manufacturing	1,599	9.8	4,070	4.4
Wholesale Trade	1,041	6.3	3,810	4.1
Transportation and Warehousing	311	1.9	3,139	3.4
Professional, Scientific, and Technical Services	369	2.3	2,124	2.3
Health Care	1,849	11.1	9,518	10.4
<b>Total</b>	<b>7,287</b>	<b>44.5</b>	<b>36,771</b>	<b>39.9</b>

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

As shown in Table Twenty-One above, the seven industry categories account for 44.5 percent of current employment in Phelps and the Rural Counties and 39.9 percent in the Core Metro/Micro Counties. Crop and Animal Production and Related Manufacturing along with Health Care are the largest industry categories in both of the two study areas. Metal, Metal Products and Machinery manufacturing is the third largest industry category in the Core Metro/Micro Counties followed closely by All Other Manufacturing and Wholesale Trade. All Other Manufacturing is the third largest industry category in Phelps and Rural Counties, followed by Wholesale Trade.

## Shift Share Analysis

Further analysis and refinement of the study area industries is accomplished using shift share analysis. Shift share analysis decomposes actual or projected changes in a local industry's employment into three components. These are the:

- National effect:** the local industry's starting employment multiplied by the percent change in national average employment for all industries—this shows the change in local employment attributable to the change in economy-wide employment;
- Industry effect:** the local industry's starting employment multiplied by the percent change in national employment for the industry minus the national effect—this shows the change in local employment attributable to an industry's employment trends after adjusting for national employment trends; and
- Competitive effect:** the difference between a local industry's ending and starting employment minus the national effect and the industry effect—this is an indication of the change in local employment attributable to an area's relative advantage or competitiveness.

The following is an example of a shift share decomposition:

1. Local Industry A grows by 10.0 percent from 1,000 to 1,100.
2. The average of all industry employment change in the U.S. is a 3.0 percent increase; the national effect is 30 or 1,000 times .03.
3. Average U.S. growth for Industry A is 5.0 percent.
4. The industry effect is .05 (5.0 percent) times 1,000 minus the national effect of 30; this is 50 minus 30 and the industry effect equals 20.
5. The competitive effect is 100 minus 30, the national effect, minus 20, the industry effect, and is equal to 50 or 5.0 percent. The industry has grown twice as fast as the average of similar industries across the U.S.

If a local industry's employment changes by the same percentage as the U.S. average for that industry, 5.0 percent in the above example, the competitive effect is zero. The change in employment for a U.S. industry is also referred to as the **expected effect** for a local industry.

If the competitive effect is very strong, a local industry can grow when the national and industry effects are both negative. Likewise, if a national industry is experiencing strong growth, the expected effect can be positive when the national effect is negative. Industries with positive industry and local competitive shift share effects are either key drivers or are likely to become key drivers of the local economy.

The criteria used to evaluate 4-digit NAICS industries within the seven broad industry categories in Table Twenty-One and the categories assigned are shown in Table Twenty-Two. Industries are selected as Key

to Future Growth (K) if they have an LQ greater than one, are projected to have both a positive competitive effect and a positive expected growth effect (industry effect plus national effect) and current annual earnings greater than \$42,000. Potential to Drive Future Growth (P) industries are projected to have a positive competitive effect, positive expected growth (Industry plus national effect), and current annual earnings greater than \$42,000, but have an LQ less than one. Mature (M), possibly declining industries, have an LQ greater than one and a negative expected growth effect.

**Table Twenty-Two**  
**Shift Share Classification of Industries by Potential to Drive Local Growth**

Shift Share Analysis Category	LQ	Projected Change LQ	Projected Competitive Effect	Expected Growth Effect (Projected Industry Effect + National Effect)	Average Earnings >\$42,000
(K) Key to Future Growth	>1	+/-	+	+	Yes
(P) Potential to Drive Future Growth	.1-1.0	+/-	+/-	+	Yes
(M) Mature or Declining	>1	+/-	+/-	-	Yes
(X) Not Further Considered	>.01	+/-	+/-	+/-	Yes/No

Table Twenty-Three, Parts A through N on this and the following pages contain the projected 2015 through 2021 national effects, industry effects, expected change effects, and competitive effects; the 2015 LQ and projected 2021 LQ; and the shift share target category for 4-digit NAICS industries in each of the two study areas for each of the six target industry categories in Table Twenty-One.

**Table Twenty-Three, Part A**  
**Core Metro/Micro Counties, Crop and Animal Production and Related Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
1110	Crop Production	32	-36	-4	39	1.27	1.40	X
1120	Animal Production and Aquaculture	36	-16	20	-25	3.22	3.12	M
1152	Support Activities for Animal Production	2	-1	1	7	1.40	1.80	K
3111	Animal Food Manufacturing	8	-1	7	-47	3.11	1.87	M
3112	Grain and Oilseed Milling	6	-7	-1	-12	2.42	2.13	M
3116	Animal Slaughtering and Processing	486	-327	159	267	22.67	23.89	K
3118	Bakeries and Tortilla Manufacturing	17	-7	10	29	1.27	1.44	K

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part B**  
**Phelps Plus Rural Counties, Crop and Animal Production and Related Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
1110	Crop Production	34	-39	-5	84	7.75	8.87	X
1120	Animal Production and Aquaculture	60	-26	34	27	30.17	30.39	K
3111	Animal Food Manufacturing	3	0	3	9	6.36	7.52	K
3116	Animal Slaughtering and Processing	3	-2	1	9	0.74	0.88	P

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part C**  
**Core Metro/Micro Counties, Metal, Metal Products and Machinery Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
3323	Architectural and Structural Metals Manufacturing	45	-28	17	-142	2.75	2.19	M
3324	Boiler, Tank, and Shipping Container Manufacturing	7	-4	3	9	1.61	1.79	K
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	6	-6	0	-8	0.38	0.36	X
3328	Coating, Engraving, Heat Treating, and Allied Activities	4	-4	0	17	0.60	0.81	X
3329	Other Fabricated Metal Product Manufacturing	62	-54	8	226	5.03	6.41	K
3331	Agriculture, Construction, and Mining Machinery Manufacturing	111	-167	-56	-4	10.24	10.37	X
3334	Ventilation, Heating, Air- Conditioning, and Commercial Refrigeration Equipment Manufacturing	26	-39	-13	24	4.52	4.90	X
3335	Metalworking Machinery Manufacturing	9	-14	-5	-29	1.13	0.88	M
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	2	-2	0	-12	0.52	0.34	X
3339	Other General Purpose Machinery Manufacturing	37	-33	4	1	3.12	3.18	K

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).



**Table Twenty-Three, Part D**  
**Phelps Plus Rural Counties, Metal, Metal Products and Machinery Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	4	-4	0	5	1.45	1.53	X
3331	Agriculture, Construction, and Mining Machinery Manufacturing	12	-17	-4	9	1.48	1.68	X
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	1	-1	0	3	1.00	1.26	X
<b>3339</b>	<b>Other General Purpose Machinery Manufacturing</b>	<b>3</b>	<b>-3</b>	<b>0</b>	<b>-6</b>	<b>1.55</b>	<b>1.33</b>	<b>M</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part E**  
**Core Metro/Micro Counties, All Other Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	8	-12	-4	75	2.51	4.25	X
<b>3219</b>	<b>Other Wood Product Manufacturing</b>	<b>14</b>	<b>-22</b>	<b>-8</b>	<b>-36</b>	<b>1.49</b>	<b>1.24</b>	<b>M</b>
3251	Basic Chemical Manufacturing	23	-28	-5	49	3.45	4.05	X
3254	Pharmaceutical and Medicine Manufacturing	2	-1	1	-4	0.16	0.14	X
<b>3261</b>	<b>Plastics Product Manufacturing</b>	<b>28</b>	<b>-36</b>	<b>-8</b>	<b>-57</b>	<b>1.17</b>	<b>1.01</b>	<b>M</b>
<b>3262</b>	<b>Rubber Product Manufacturing</b>	<b>21</b>	<b>-42</b>	<b>-21</b>	<b>-10</b>	<b>3.62</b>	<b>3.55</b>	<b>M</b>
3273	Cement and Concrete Product Manufacturing	7	-8	-1	6	0.89	0.95	X
3359	Other Electrical Equipment and Component Manufacturing	3	-3	0	19	0.49	0.74	X
<b>3363</b>	<b>Motor Vehicle Parts Manufacturing</b>	<b>128</b>	<b>-140</b>	<b>-12</b>	<b>-42</b>	<b>5.17</b>	<b>5.13</b>	<b>M</b>
3369	Other Transportation Equipment Manufacturing	13	-23	-10	63	8.78	12.19	X
3391	Medical Equipment and Supplies Manufacturing	3	0	3	-1	0.24	0.24	X

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part F**  
**Phelps Plus Rural Counties, All Other Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
3152	Cut and Sew Apparel Manufacturing	1	-6	-5	3	1.26	1.58	X
<b>3219</b>	<b>Other Wood Product Manufacturing</b>	<b>6</b>	<b>-10</b>	<b>-4</b>	<b>1</b>	<b>3.63</b>	<b>3.59</b>	<b>M</b>
3251	Basic Chemical Manufacturing	6	-7	-1	27	4.98	6.45	X
<b>3254</b>	<b>Pharmaceutical and Medicine Manufacturing</b>	<b>3</b>	<b>-1</b>	<b>2</b>	<b>14</b>	<b>1.24</b>	<b>1.64</b>	<b>K</b>
<b>3362</b>	<b>Motor Vehicle Body and Trailer Manufacturing</b>	<b>2</b>	<b>-1</b>	<b>1</b>	<b>16</b>	<b>2.00</b>	<b>2.86</b>	<b>K</b>
<b>3364</b>	<b>Aerospace Product and Parts Manufacturing</b>	<b>10</b>	<b>-8</b>	<b>2</b>	<b>51</b>	<b>2.69</b>	<b>3.52</b>	<b>K</b>
<b>3391</b>	<b>Medical Equipment and Supplies Manufacturing</b>	<b>83</b>	<b>-10</b>	<b>73</b>	<b>48</b>	<b>34.52</b>	<b>35.04</b>	<b>K</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part G**  
**Core Metro/Micro Counties, Wholesale Trade**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
<b>4231</b>	<b>Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers</b>	<b>23</b>	<b>-3</b>	<b>20</b>	<b>-40</b>	<b>1.57</b>	<b>1.41</b>	<b>M</b>
<b>4233</b>	<b>Lumber and Other Construction Materials Merchant Wholesalers</b>	<b>5</b>	<b>-2</b>	<b>3</b>	<b>16</b>	<b>0.53</b>	<b>0.65</b>	<b>P</b>
<b>4234</b>	<b>Professional and Commercial Equipment and Supplies Merchant Wholesalers</b>	<b>5</b>	<b>-4</b>	<b>1</b>	<b>21</b>	<b>0.20</b>	<b>0.25</b>	<b>P</b>
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	6	-5	1	-7	0.99	0.92	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	11	-11	0	-11	0.75	0.71	X
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	11	-4	7	-17	0.99	0.90	X
<b>4238</b>	<b>Machinery, Equipment, and Supplies Merchant Wholesalers</b>	<b>78</b>	<b>-47</b>	<b>31</b>	<b>46</b>	<b>2.58</b>	<b>2.73</b>	<b>K</b>
<b>4239</b>	<b>Miscellaneous Durable Goods Merchant Wholesalers</b>	<b>6</b>	<b>1</b>	<b>7</b>	<b>10</b>	<b>0.47</b>	<b>0.52</b>	<b>P</b>
4242	Drugs and Druggists' Sundries Merchant Wholesalers	2	-3	-1	6	0.21	0.27	X
<b>4244</b>	<b>Grocery and Related Product Merchant Wholesalers</b>	<b>41</b>	<b>1</b>	<b>42</b>	<b>51</b>	<b>1.26</b>	<b>1.38</b>	<b>K</b>
<b>4245</b>	<b>Farm Product Raw Material Merchant Wholesalers</b>	<b>35</b>	<b>-12</b>	<b>23</b>	<b>-18</b>	<b>10.67</b>	<b>10.46</b>	<b>M</b>
4246	Chemical and Allied Products Merchant Wholesalers	2	0	2	-2	0.28	0.26	X
<b>4247</b>	<b>Petroleum and Petroleum Products Merchant Wholesalers</b>	<b>5</b>	<b>-6</b>	<b>-1</b>	<b>-45</b>	<b>1.11</b>	<b>0.39</b>	<b>M</b>
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	11	8	19	-1	1.36	1.38	X
<b>4249</b>	<b>Miscellaneous Nondurable Goods Merchant Wholesalers</b>	<b>23</b>	<b>-20</b>	<b>3</b>	<b>-28</b>	<b>1.57</b>	<b>1.46</b>	<b>M</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part H**  
**Phelps Plus Rural Counties, Wholesale Trade**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	26	-15	11	27	4.76	4.98	K
4245	Farm Product Raw Material Merchant Wholesalers	28	-10	18	-30	48.25	43.82	M
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	16	-14	2	44	6.32	7.33	K

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part I**  
**Core Metro/Micro Counties, Transportation and Warehousing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
4821	Rail Transportation	29	-45	-16	0	2.87	2.91	X
4841	General Freight Trucking	76	-6	70	-50	1.74	1.69	M
4842	Specialized Freight Trucking	53	-5	48	141	2.65	3.16	K
4881	Support Activities for Air Transportation	4	4	8	7	0.49	0.55	P
4882	Support Activities for Rail Transportation	6	6	12	-35	4.04	2.62	M
4889	Other Support Activities for Transportation	1	-1	0	4	0.68	0.89	X
4921	Couriers and Express Delivery Services	16	-8	8	-13	0.66	0.63	X
4931	Warehousing and Storage	18	20	38	-52	0.51	0.43	X

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part J**  
**Phelps Plus Rural Counties, Transportation and Warehousing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
4821	Rail Transportation	8	-13	-5	-7	4.51	4.14	M
4841	General Freight Trucking	2	0	2	-8	0.32	0.25	X
4842	Specialized Freight Trucking	10	-1	9	11	2.88	3.02	K

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part K**  
**Core Metro/Micro Counties, Professional, Scientific, and Technical Services**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
<b>5411</b>	<b>Legal Services</b>	<b>22</b>	<b>-12</b>	<b>10</b>	<b>13</b>	<b>0.44</b>	<b>0.47</b>	<b>P</b>
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	33	15	48	-43	0.76	0.71	X
<b>5413</b>	<b>Architectural, Engineering, and Related Services</b>	<b>19</b>	<b>6</b>	<b>25</b>	<b>19</b>	<b>0.31</b>	<b>0.33</b>	<b>P</b>
<b>5415</b>	<b>Computer Systems Design and Related Services</b>	<b>14</b>	<b>29</b>	<b>43</b>	<b>34</b>	<b>0.16</b>	<b>0.19</b>	<b>P</b>
<b>5416</b>	<b>Management, Scientific, and Technical Consulting Services</b>	<b>29</b>	<b>68</b>	<b>97</b>	<b>52</b>	<b>0.52</b>	<b>0.58</b>	<b>P</b>
<b>5417</b>	<b>Scientific Research and Development Services</b>	<b>4</b>	<b>1</b>	<b>5</b>	<b>17</b>	<b>0.13</b>	<b>0.17</b>	<b>P</b>
5418	Advertising, Public Relations, and Related Services	5	1	6	-17	0.21	0.16	X

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part L**  
**Phelps Plus Rural Counties, Professional, Scientific, and Technical Services**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
<b>5411</b>	<b>Legal Services</b>	<b>7</b>	<b>-4</b>	<b>3</b>	<b>17</b>	<b>0.75</b>	<b>0.86</b>	<b>P</b>
<b>5412</b>	<b>Accounting, Tax Preparation, Bookkeeping, and Payroll Services</b>	<b>3</b>	<b>1</b>	<b>4</b>	<b>4</b>	<b>0.40</b>	<b>0.42</b>	<b>P</b>
<b>5416</b>	<b>Management, Scientific, and Technical Consulting Services</b>	<b>9</b>	<b>20</b>	<b>29</b>	<b>22</b>	<b>0.86</b>	<b>0.96</b>	<b>P</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part M**  
**Core Metro/Micro Counties, Health Care**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
6211	Offices of Physicians	108	103	211	-185	0.97	0.88	X
6212	Offices of Dentists	40	25	65	-24	1.00	0.98	X
<b>6213</b>	<b>Offices of Other Health Practitioners</b>	<b>67</b>	<b>166</b>	<b>233</b>	<b>31</b>	<b>1.89</b>	<b>1.97</b>	<b>K</b>
6214	Outpatient Care Centers	45	122	167	93	1.39	1.57	K
6215	Medical and Diagnostic Laboratories	1	2	3	2	0.13	0.14	P
<b>6221</b>	<b>General Medical and Surgical Hospitals</b>	<b>202</b>	<b>45</b>	<b>247</b>	<b>-436</b>	<b>1.02</b>	<b>0.89</b>	<b>M</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Three, Part N**  
**Phelps Plus Rural Counties, Crop and Animal Production and Related Manufacturing**

NAICS	Description	2015 - 2021 National Effect	2015 - 2021 Industry Effect	2015 - 2021 Expected Change 2015 - 2021	Competitive Effect 2015 - 2021	LQ 2015	LQ 2021	Target
6211	Offices of Physicians	12	11	23	-17	0.59	0.53	X
<b>6213</b>	<b>Offices of Other Health Practitioners</b>	<b>9</b>	<b>22</b>	<b>31</b>	<b>-8</b>	<b>1.39</b>	<b>1.29</b>	<b>M</b>
<b>6221</b>	<b>General Medical and Surgical Hospitals</b>	<b>39</b>	<b>9</b>	<b>48</b>	<b>4</b>	<b>1.11</b>	<b>1.10</b>	<b>K</b>

Source: Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

*Phelps County Development Corporation Target Industries Review September 2016*

Table Twenty-Four below contains the 13, 4-digit NAICS industries that achieved a target classification of Key (K), Potential (P) or Mature (M) Industries in both Phelps Plus Rural Counties and Core Metro/Micro Counties. These 13 industries can form a core of potential target industries for PCDC to consider for further evaluation as potential target industries.

**Table Twenty-Four**  
**Key, Potential, and Mature Industries Located in Both Phelps Plus Rural and Core Metro/Micro Counties**

Category	NAICS		Phelps Plus Rural Counties				Core Metro/Micro Counties			
			2015-2021 Competitive Effect	2015 LQ	2021 LQ	Class	2015-2021 Competitive Effect	2015 LQ	2021 LQ	Class
Crop and Animal Production and Related Manufacturing	1120	Animal Production and Aquaculture	27	30.17	30.39	K	-25	3.22	3.12	M
	3111	Animal Food Manufacturing	9	6.36	7.52	K	-47	3.11	1.87	M
	3116	Animal Slaughtering and Processing	9	0.74	0.88	P	267	22.67	23.89	K
Metal, Metal Products and Machinery Manufacturing	3339	Other General Purpose Machinery Manufacturing	-6	1.55	1.33	M	1	3.12	3.18	K
All Other Manufacturing	3219	Other Wood Product Manufacturing	1	3.63	3.59	M	-36	1.49	1.24	M
Wholesale Trade	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	27	4.76	4.98	K	46	2.58	2.73	K
	4245	Farm Product Raw Material Merchant Wholesalers	-30	48.25	43.82	M	-18	10.67	10.46	M
	4249	Miscellaneous Nondurable Goods Merchant Wholesalers	44	6.32	7.33	K	-28	1.57	1.46	M
Transportation and Warehousing	4842	Specialized Freight Trucking	11	2.88	3.02	K	141	2.65	3.16	K
Professional, Scientific, and Technical Services	5411	Legal Services	17	0.75	0.86	P	13	0.44	0.47	P
	5416	Management, Scientific, and Technical Consulting Services	22	0.86	0.96	P	52	0.52	0.58	P
Health Care	6213	Offices of Other Health Practitioners	-8	1.39	1.29	M	31	1.89	1.97	K
	6221	General Medical and Surgical Hospitals	4	1.11	1.1	K	-436	1.02	0.89	M

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

Table Twenty-Five below contains five 4-digit NAICS industries that achieved a target classification of Key (K), Potential (P) or Mature (M) Industries in Phelps Plus Rural Counties. These industries either do not exist or are classified as not further considered in the Core Metro/Micro Counties. PCDC may want to consider including these five industries on its list for further evaluation for its target industry program.

**Table Twenty-Five**  
**Industries Classified as Key, Potential or Mature Only in Phelps Plus Rural Counties**

Category	NAICS		Phelps Plus Rural Counties				Core Metro/Micro Counties			
			2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class	2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class
All Other Manufacturing	3254	Pharmaceutical and Medicine Manufacturing	14	1.24	1.64	K	-4	0.16	0.14	X
	3362	Motor Vehicle Body and Trailer Manufacturing	16	2.00	2.86	K	0	0.00	0.00	X
	3364	Aerospace Product and Parts Manufacturing	51	2.69	3.52	K	0	0.00	0.00	X
	3391	Medical Equipment and Supplies Manufacturing	48	34.52	35.04	K	-1	0.24	0.24	X
	5412	Accounting, Tax Preparation, Bookkeeping, and Payroll	4	0.40	0.42	P	-43	0.76	0.71	X
Professional, Scientific, and Technical Services										

Data source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).



## Supply Chain Opportunities

Tables Twenty-Six through Thirty-Six on the following pages identify local area, 6-Digit NAICS industries currently supplying a large portion of the total inputs purchased locally by industries in

Table Twenty-Four. These industries may be able to increase their sales to Key, Potential, and Mature area industries and may also be considered potential targets for PCDC retention, expansion, and recruitment efforts.

Table Thirty-Seven contains those supplying industries with a large presence in both Phelps and the Other Rural Counties and in the Core Metro/Micro Counties.

**Table Twenty-Six**  
**Amount and Percent of Imports by NAICS 1120 Animal Production and Aquaculture With**  
**Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
115112	Soil Preparation, Planting, and Cultivating	55.4	353,912	14,740,827
115210	Support Activities for Animal Production	71.4	527,224	7,476,429
311224	Soybean and Other Oilseed Processing	71.2	875,566	105,971,756
333111	Farm Machinery and Equipment Manufacturing	58.5	548,217	693,763,692
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	71.7	253,787	16,262,801
423830	Industrial Machinery and Equipment Merchant Wholesalers	56.0	781,724	21,824,226
423840	Industrial Supplies Merchant Wholesalers	71.7	250,908	6,310,637
423930	Recyclable Material Merchant Wholesalers	71.0	258,642	7,683,144
482110	Rail transportation	69.8	1,397,243	177,999,049
484110	General Freight Trucking, Local	72.1	1,022,990	30,022,528
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	45.5	292,226	4,353,124
Phelps Plus Rural Counties				
115112	Soil Preparation, Planting, and Cultivating	55.8	541,261	7,878,752
325320	Pesticide and Other Agricultural Chemical Manufacturing	64.7	600,773	2,412,633
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	55.5	301,329	74,188,804
482110	Rail transportation	73.3	2,232,172	50,879,332
484110	General Freight Trucking, Local	68.7	1,480,459	7,532,606
484220	Specialized Freight (except Used Goods) Trucking, Local	50.9	799,845	14,034,825
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	62.2	607,646	6,640,973
522110	Commercial Banking	55.2	1,397,444	53,168,216

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Seven**  
**Amount and Percent of Imports by NAICS 3111 Animal Food Manufacturing With Total**  
**Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
311119	Other Animal Food Manufacturing	69.5	422,878	112,084,128
325411	Medicinal and Botanical Manufacturing	68.7	2,621,312	5,510,626
423830	Industrial Machinery and Equipment Merchant Wholesalers	74.5	660,155	21,824,226
482110	Rail transportation	68.6	2,649,328	177,999,049
484121	General Freight Trucking, Long-Distance, Truckload	74.9	1,145,950	141,997,524
Phelps Plus Rural Counties				
482110	Rail transportation	72.6	624,139	50,879,332

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Eight**  
**Amount and Percent of Imports by NAICS 3116 Animal Slaughtering and Processing With**  
**Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
311613	Rendering and Meat Byproduct Processing	61.4	14,217,166	42,601,886
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	52.8	403,581	38,109,536
336390	Other Motor Vehicle Parts Manufacturing	63.0	283,005	372,649,286
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	49.8	468,555	2,175,446
423510	Metal Service Centers and Other Metal Merchant Wholesalers	68.7	981,181	5,495,039
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	65.7	615,308	13,838,703
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	48.2	489,529	16,262,801
423830	Industrial Machinery and Equipment Merchant Wholesalers	54.0	2,159,942	21,824,226
423840	Industrial Supplies Merchant Wholesalers	55.7	559,039	6,310,637
424410	General Line Grocery Merchant Wholesalers	74.6	1,712,243	17,888,769
424450	Confectionery Merchant Wholesalers	65.5	361,813	5,008,147
424810	Beer and Ale Merchant Wholesalers	46.0	451,131	10,650,496
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	54.6	604,241	1,880,082
441110	New Car Dealers	56.8	310,632	52,280,362
445110	Supermarkets and Other Grocery (except Convenience) Stores	49.2	973,020	27,576,187
482110	Rail transportation	68.0	1,437,914	177,999,049
484121	General Freight Trucking, Long-Distance, Truckload	70.1	36,300,752	141,997,524
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	47.8	5,256,585	4,353,124
517110	Wired Telecommunications Carriers	63.4	1,049,484	12,183,032
517210	Wireless Telecommunications Carriers (except Satellite)	71.0	568,429	7,691,529
522130	Credit Unions	68.7	468,399	2,300,387
522292	Real Estate Credit	56.2	334,763	2,044,479
541380	Testing Laboratories	68.6	408,725	3,218,639
541990	All Other Professional, Scientific, and Technical Services	59.7	3,126,092	5,736,629
561422	Telemarketing Bureaus and Other Contact Centers	68.4	259,731	2,430,983
561720	Janitorial Services	44.1	1,247,006	27,854,656
561730	Landscaping Services	70.5	1,709,777	9,544,515
562910	Remediation Services	69.3	518,481	5,237,689
721110	Hotels (except Casino Hotels) and Motels	47.6	888,551	22,915,850
722511	Full-Service Restaurants	47.4	1,094,086	33,746,023
811111	General Automotive Repair	42.3	268,891	20,334,265
811121	Automotive Body, Paint, and Interior Repair and Maintenance	59.9	276,542	12,909,126

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Twenty-Nine**  
**Amount and Percent of Imports by NAICS 3339 Other General Purpose Machinery**  
**Manufacturing With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
333613	Mechanical Power Transmission Equipment Manufacturing	59.6	407,162	7,994,181
333911	Pump and Pumping Equipment Manufacturing	68.2	256,082	64,006,898
336390	Other Motor Vehicle Parts Manufacturing	73.1	638,086	372,649,286
484121	General Freight Trucking, Long-Distance, Truckload	73.7	487,198	141,997,524
541110	Offices of Lawyers	72.6	291,949	9,176,714
541990	All Other Professional, Scientific, and Technical Services	53.1	252,566	5,736,629

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty**  
**Amount and Percent of Imports by NAICS 4238 Machinery, Equipment, and Supplies**  
**Merchant Wholesalers With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
492110	Couriers and Express Delivery Services	56.3	1,538,280	14,430,449
515120	Television Broadcasting	67.3	353,717	3,195,761
517110	Wired Telecommunications Carriers	65.3	661,567	12,183,032
517210	Wireless Telecommunications Carriers (except Satellite)	65.2	299,350	7,691,529
522292	Real Estate Credit	50.6	255,520	2,044,479
524113	Direct Life Insurance Carriers	40.6	310,493	68,702,444
531110	Lessors of Residential Buildings and Dwellings	44.5	793,287	23,412,325
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	48.3	852,265	21,445,988
531210	Offices of Real Estate Agents and Brokers	71.9	996,404	9,986,631
531312	Nonresidential Property Managers	67.3	288,857	3,129,864
541110	Offices of Lawyers	74.5	901,140	9,176,714
541613	Marketing Consulting Services	67.3	308,642	2,299,996
541810	Advertising Agencies	68.6	797,047	1,133,596
561730	Landscaping Services	68.5	263,592	9,544,515
561990	All Other Support Services	72.6	430,248	1,199,903
812990	All Other Personal Services	62.8	260,221	2,161,566
901149	US Postal Service	48.4	608,446	13,093,388
Phelps Plus Rural Counties				
531110	Lessors of Residential Buildings and Dwellings	65.1	347,487	6,369,701
541611	Administrative Management and General Management Consulting Services	74.5	284,728	5,237,463

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-One**  
**Amount and Percent of Imports by NAICS 4245 Farm Product Raw Material Merchant**  
**Wholesalers With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
492110	Couriers and Express Delivery Services	63.3	760,355	14,430,449
517110	Wired Telecommunications Carriers	61.6	274,597	12,183,032
531110	Lessors of Residential Buildings and Dwellings	50.2	392,991	23,412,325
531120	Lessors of Nonresidential Buildings (except Mini-warehouses)	47.8	370,796	21,445,988
531210	Offices of Real Estate Agents and Brokers	71.0	431,989	9,986,631
901149	US Postal Service	51.0	281,797	13,093,388
Phelps Plus Rural Counties				
524126	Direct Property and Casualty Insurance Carriers	66.9	270,873	5,689,038
531110	Lessors of Residential Buildings and Dwellings	69.8	429,791	6,369,701

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Two**  
**Amount and Percent of Imports by NAICS 4249 Miscellaneous Nondurable Goods Merchant**  
**Wholesalers With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
492110	Couriers and Express Delivery Services	59.2	403,542	14,430,449

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Three**  
**Amount and Percent of Imports by NAICS 4842 Specialized Freight Trucking With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
336390	Other Motor Vehicle Parts Manufacturing	52.1	359,754	372,649,286
482110	Rail transportation	68.8	851,489	177,999,049
484121	General Freight Trucking, Long-Distance, Truckload	72.2	405,438	141,997,524
488190	Other Support Activities for Air Transportation	60.1	380,315	2,909,374
492110	Couriers and Express Delivery Services	60.5	2,643,240	14,430,449
524113	Direct Life Insurance Carriers	46.7	267,949	68,702,444
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	61.9	313,475	14,917,934
901149	US Postal Service	49.3	909,644	13,093,388

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Four**  
**Amount and Percent of Imports by NAICS 5411 Legal Services With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
531210	Offices of Real Estate Agents and Brokers	70.2	259,107	9,986,631
541110	Offices of Lawyers	74.5	277,357	9,176,714

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Five**  
**Amount and Percent of Imports by NAICS 6213 Offices of Other Health Practitioners With Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
531110	Lessors of Residential Buildings and Dwellings	44.9	438,980	23,412,325
531120	Lessors of Nonresidential Buildings (except Mini-warehouses)	48.5	470,153	21,445,988
531210	Offices of Real Estate Agents and Brokers	69.9	531,681	9,986,631

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Six**  
**Amount and Percent of Imports by NAICS 6221 General Medical and Surgical Hospitals With**  
**Total Exports by Corresponding Local Industries**

		Purchased Out of Region		Exported from
NAICS	Description	Percent	Amount (\$)	Region
Core Metro/Micro				
441110	New Car Dealers	55.0	325,536	52,280,362
492110	Couriers and Express Delivery Services	53.5	379,232	14,430,449
517110	Wired Telecommunications Carriers	64.2	1,395,088	12,183,032
517210	Wireless Telecommunications Carriers (except Satellite)	68.2	502,408	7,691,529
523120	Securities Brokerage	44.8	453,223	11,633,646
523920	Portfolio Management	66.8	801,427	5,991,768
523930	Investment Advice	59.5	2,422,521	14,767,418
524113	Direct Life Insurance Carriers	43.8	2,254,593	68,702,444
531110	Lessors of Residential Buildings and Dwellings	45.0	1,671,777	23,412,325
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	48.7	1,791,479	21,445,988
531130	Lessors of Miniwarehouses and Self-Storage Units	45.2	369,212	7,265,721
531210	Offices of Real Estate Agents and Brokers	67.5	1,945,854	9,986,631
531312	Nonresidential Property Managers	67.9	606,469	3,129,864
532111	Passenger Car Rental	58.0	262,248	2,079,153
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	67.8	779,037	14,917,934
541110	Offices of Lawyers	73.8	3,884,794	9,176,714
541611	Administrative Management and General Management Consulting Services	74.8	2,237,030	5,553,853
541613	Marketing Consulting Services	63.4	681,556	2,299,996
541614	Process, Physical Distribution, and Logistics Consulting Services	64.7	273,628	1,285,150
541990	All Other Professional, Scientific, and Technical Services	54.7	365,162	5,736,629
561720	Janitorial Services	57.4	612,823	27,854,656
561730	Landscaping Services	67.8	621,002	9,544,515
561990	All Other Support Services	70.9	282,308	1,199,903
621910	Ambulance Services	51.2	1,308,932	1,080,575
811111	General Automotive Repair	43.9	312,147	20,334,265
811121	Automotive Body, Paint, and Interior Repair and Maintenance	57.9	298,694	12,909,126
812332	Industrial Launderers	57.9	300,111	2,603,413
901149	US Postal Service	49.5	361,446	13,093,388
Phelps Plus Rural Counties				
339112	Surgical and Medical Instrument Manufacturing	71.9	335,388	247,461,705
524126	Direct Property and Casualty Insurance Carriers	73.4	935,509	5,689,038
531110	Lessors of Residential Buildings and Dwellings	63.4	379,839	6,369,701
541611	Administrative Management and General Management Consulting Services	66.0	318,346	5,237,463

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).

**Table Thirty-Seven**  
**In-region Purchases and Total Exports, Selected Industries Suppling Potential Targets**

NAICS	Description	Phelps Plus Rural Counties		Core Metro/Micro Counties	
		In-region Purchases	Exported from Region	In-region Purchases	Exported from Region
115112	Soil Preparation, Planting, and Cultivating	429,135	7,878,752	284,345	14,740,827
482110	Rail transportation	1,047,964	50,879,332	2,024,674	177,999,049
484110	General Freight Trucking, Local	675,595	7,532,606	395,108	30,022,528
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	369,494	6,640,973	350,468	4,353,124
541611	Administrative Management and General Management Consulting Services	164,155	5,237,463	753,635	5,553,853

Source: Economic Modeling Specialists International (EMSI) / [www.economicmodeling.com](http://www.economicmodeling.com).