



Target Industry Cluster Analysis

Eastern Indiana Regional Planning Commission Region,
Indiana



Table of contents

01

Overview

02

Industry Cluster Analysis

03

Target Industry Clusters

01 overview

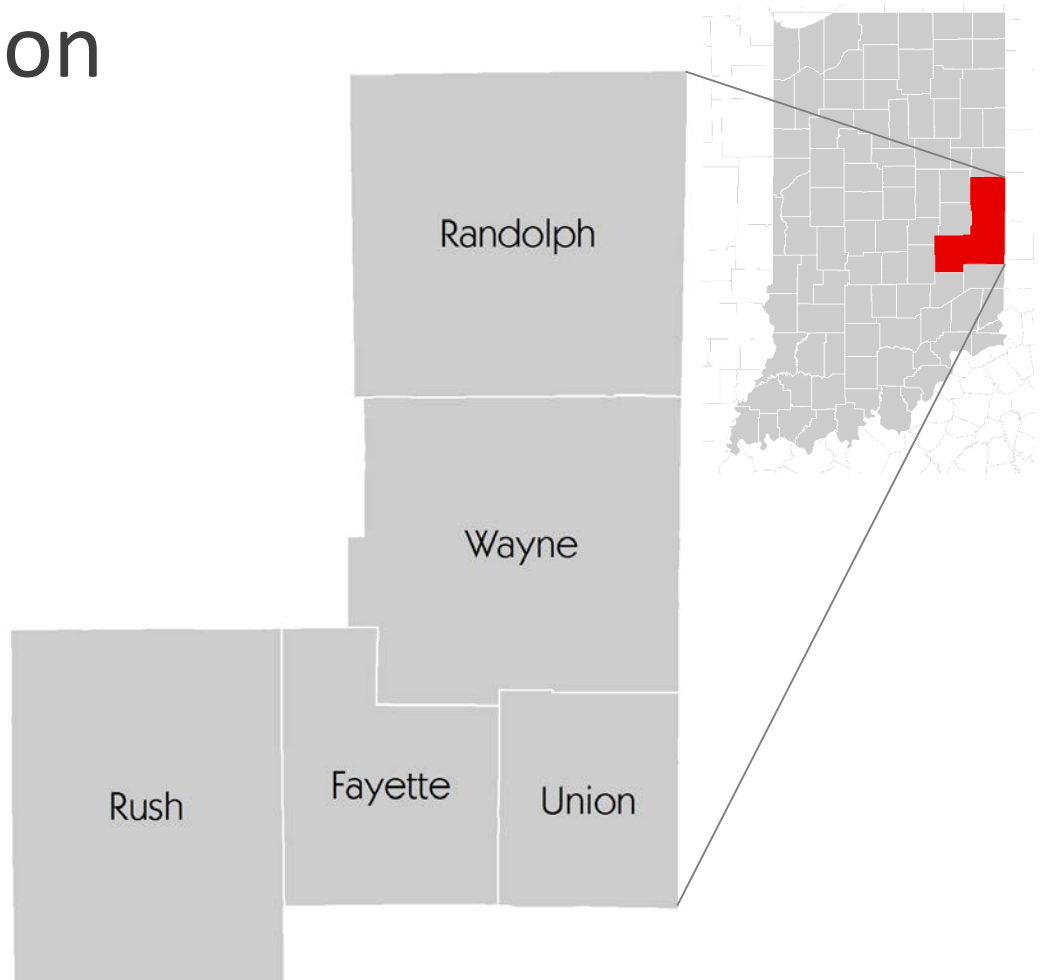
**Eastern Indiana Regional
Planning Commission Region, IN**

Overview

Eastern Indiana Regional Planning Commission Region

The Eastern Indiana Regional Planning Commission Region is comprised of five Indiana counties. I-70 passes through the central part of the region connecting to Indianapolis to the west and Dayton, OH to the east.

- Fayette
- Randolph
- Rush
- Union
- Wayne



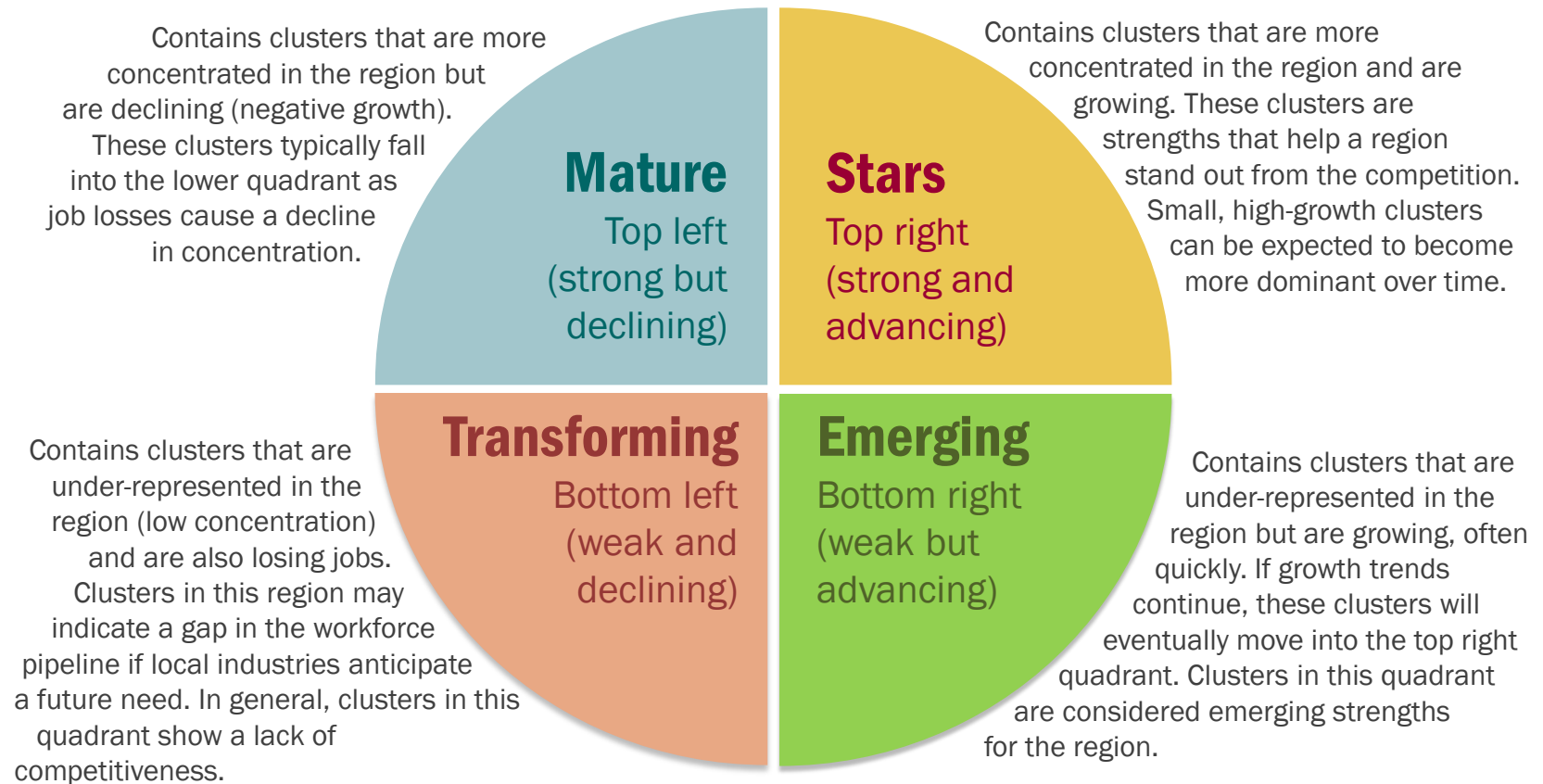
02 industry cluster analysis

**Eastern Indiana Regional
Planning Commission Region, IN**

Industry cluster analysis

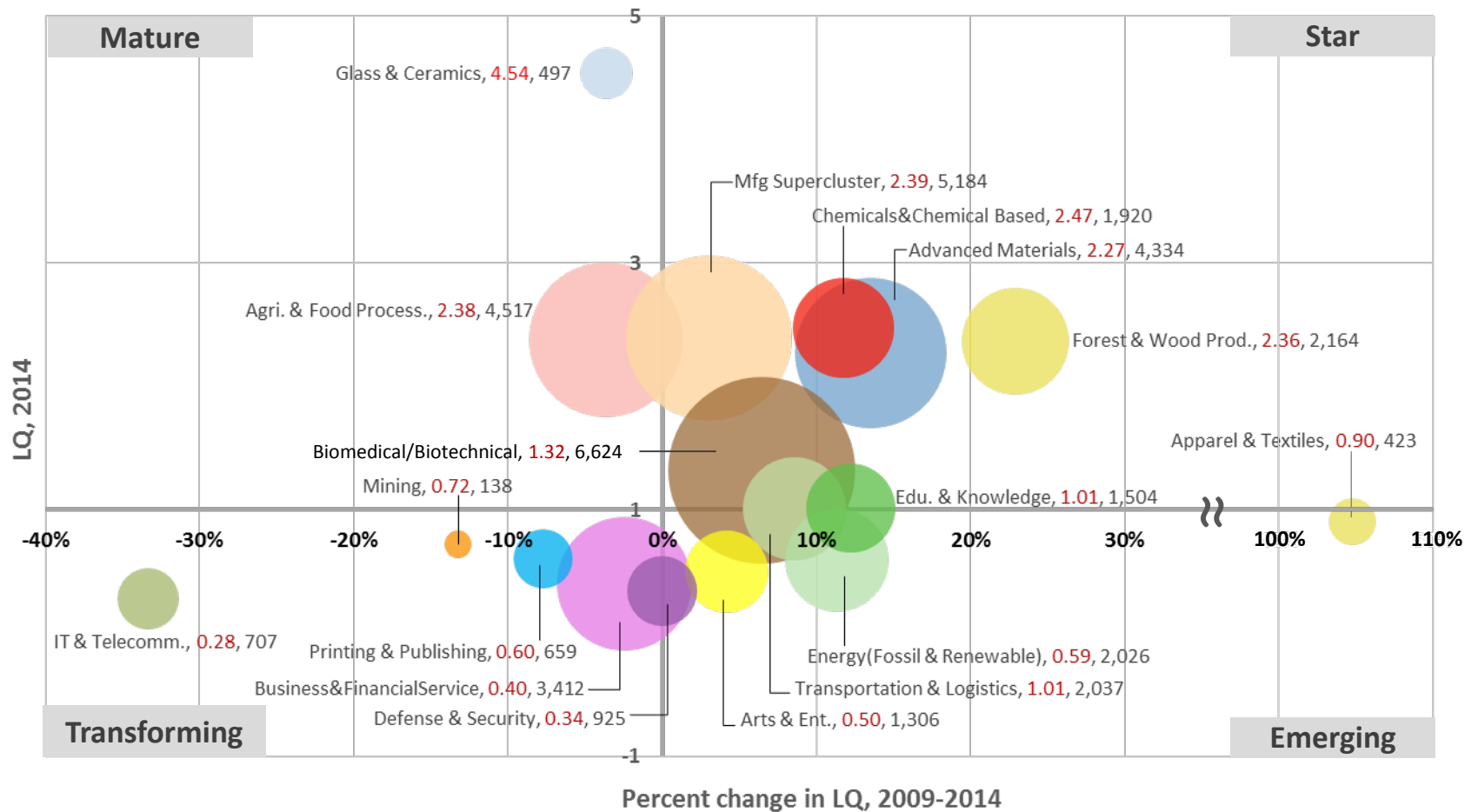
How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



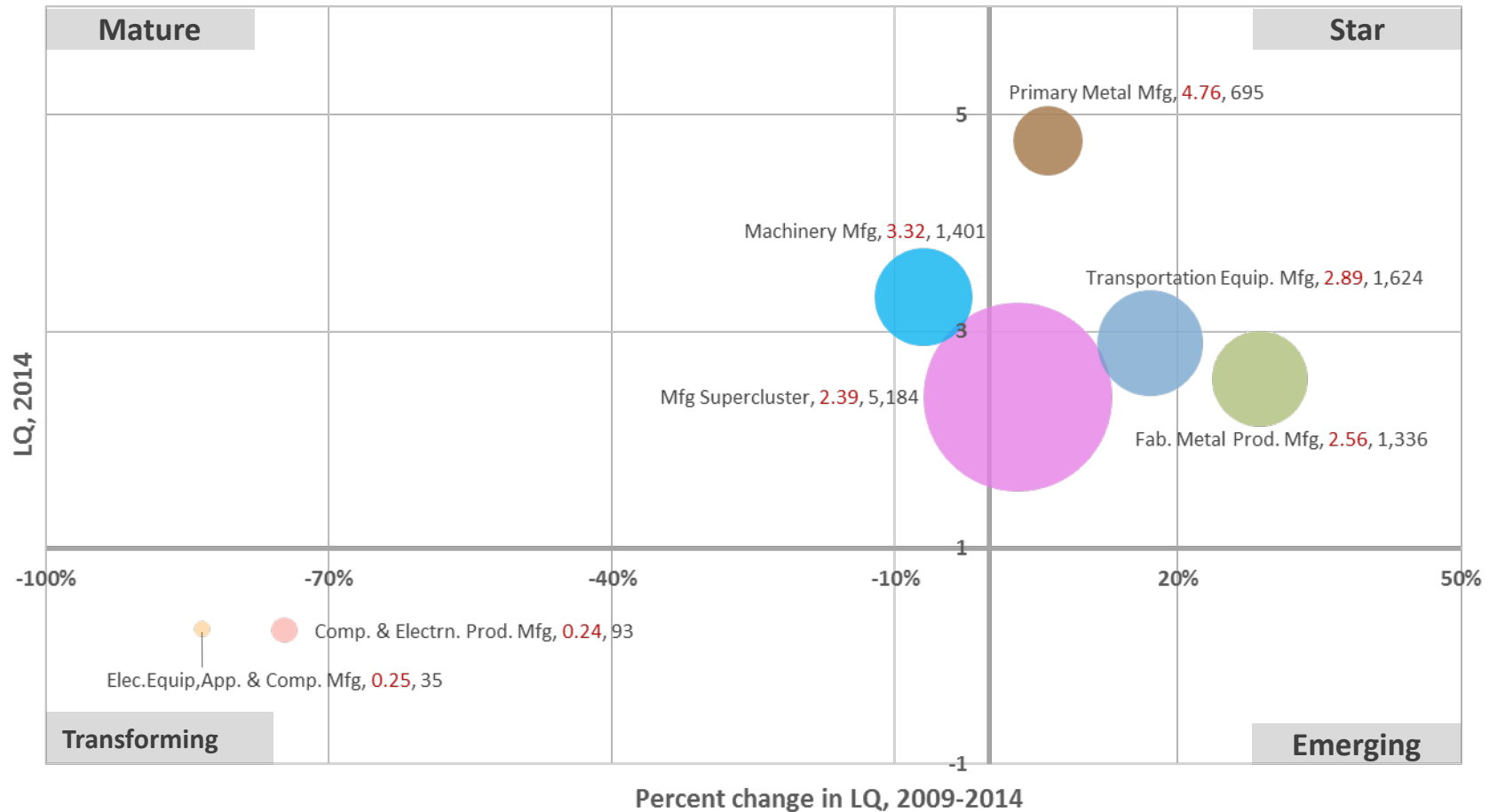
Industry and occupation

Industry cluster bubble chart



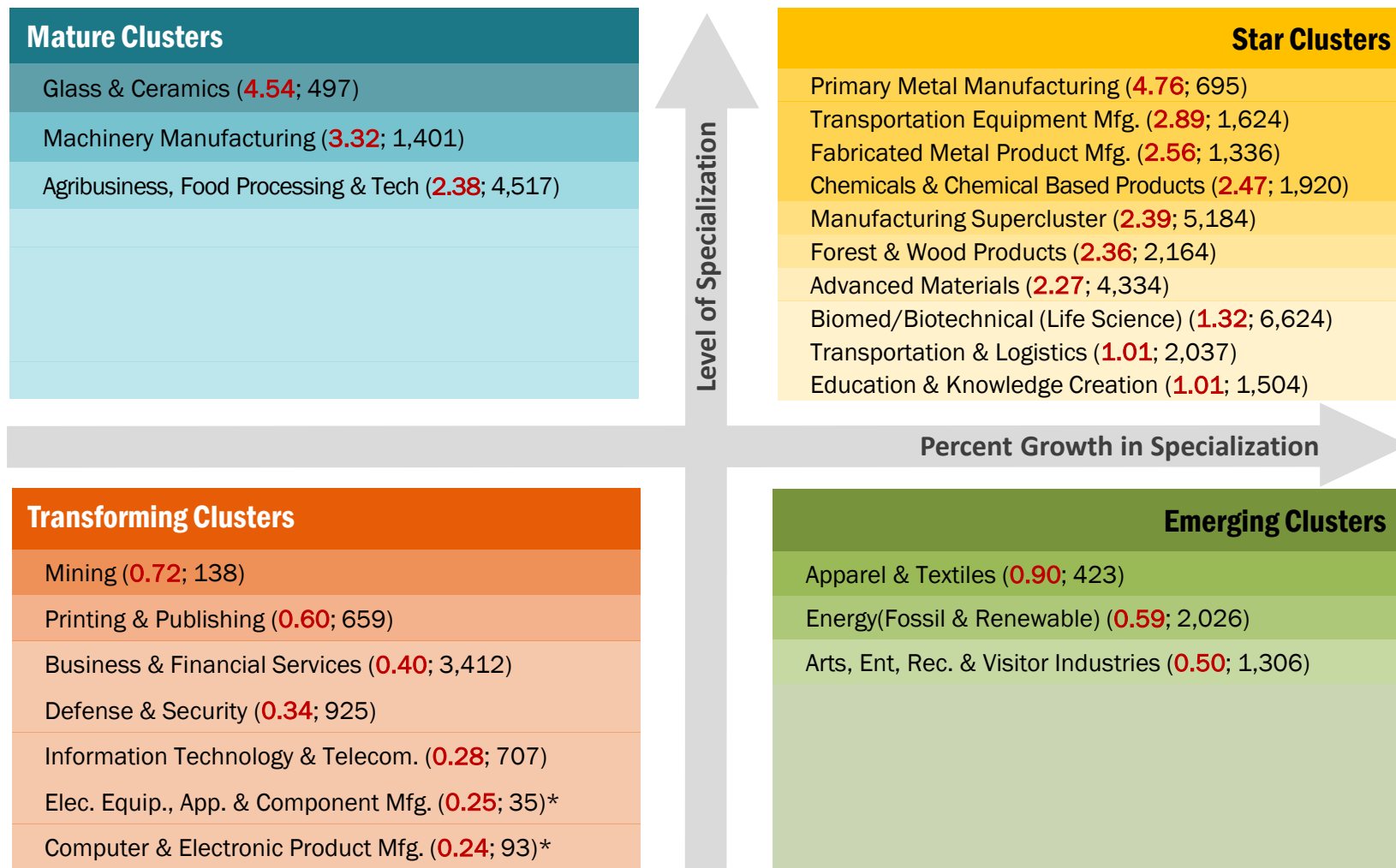
Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Elec. Equipment, App. & Component Mfg. and Computer & Electronic Product Mfg. subclusters have too few jobs.

Industry cluster analysis



* Elec. Equipment, App. & Component Mfg. and Computer & Electronic Product Mfg. subclusters have too few jobs.

section 02

NOTE: The first number after each cluster represents its location quotient while the second number represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient.

Industry and occupation

Bubble chart interpretation

Mature Industries

Three industry clusters in the Eastern Indiana Regional Planning Commission Region are in the Maturing stage: Glass & Ceramics; Machinery Manufacturing; Agribusiness, Food Processing & Technology. These industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the Eastern Indiana Regional Planning Commission Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Eastern Indiana Regional Planning Commission Region, Mining; Printing & Publishing; Business & Financial Services; Defense & Security; Information Technology & Telecom. are all Transforming clusters. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The most highly concentrated of the Star industry clusters in the Eastern Indiana Regional Planning Commission Region is Primary Metal Manufacturing . Its location quotient is 4.76, indicating that the cluster is 5 times more concentrated in the region compared to the U.S. The other strong clusters in the region are Transportation Equipment Mfg.; Fabricated Metal Product Mfg.; Chemicals & Chemical Based Products; Manufacturing Supercluster; Forest & Wood Products and Advanced Materials.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are three Emerging clusters in the Eastern Indiana Regional Planning Commission Region: Apparel & Textiles; Energy (Fossil & Renewable); and Arts, Entertainment, Recreation & Visitor Industries.

03
target
industry
cluster

**Agribusiness, Food
Processing and Technology**

Advanced Materials

**Arts, Entertainment,
Recreation And Visitor
Industries**

Shift-Share Analysis by Top Industry Sectors: EIRPC Region, IN

Agribusiness, Food Processing and Technology Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Animal Production	1,722	124	-159	-35	↑ 118
Crop Production	1,166	103	-92	11	-202
Farm Supplies Merchant Wholesalers	207	19	0	19	-62
Dog and Cat Food Manufacturing	204	16	6	22	-34
Farm and Garden Machinery and Equipment Merchant Wholesalers	162	11	-1	10	↑ 11
Other Animal Food Manufacturing	157	16	-16	0	-58
Fluid Milk Manufacturing	100	13	-18	-5	-69
Grain and Field Bean Merchant Wholesalers	100	7	3	10	-5
Soil Preparation, Planting, and Cultivating	99	2	4	6	↑ 65
Perishable Prepared Food Manufacturing	94	8	4	12	-24
Cookie and Cracker Manufacturing	79	12	-5	7	-93
Farm Labor Contractors and Crew Leaders	73	5	5	10	-9
Farm Machinery and Equipment Manufacturing	67	5	10	15	-18
Wineries	64	1	2	3	↑ 45
Retail Bakeries	34	1	2	3	↑ 14

Note: Upward arrow (↑) indicates regional competitiveness.

section 03

Top 15 Inputs by Dollars: EIRPC Region, IN

Agribusiness, Food Processing and Technology Cluster

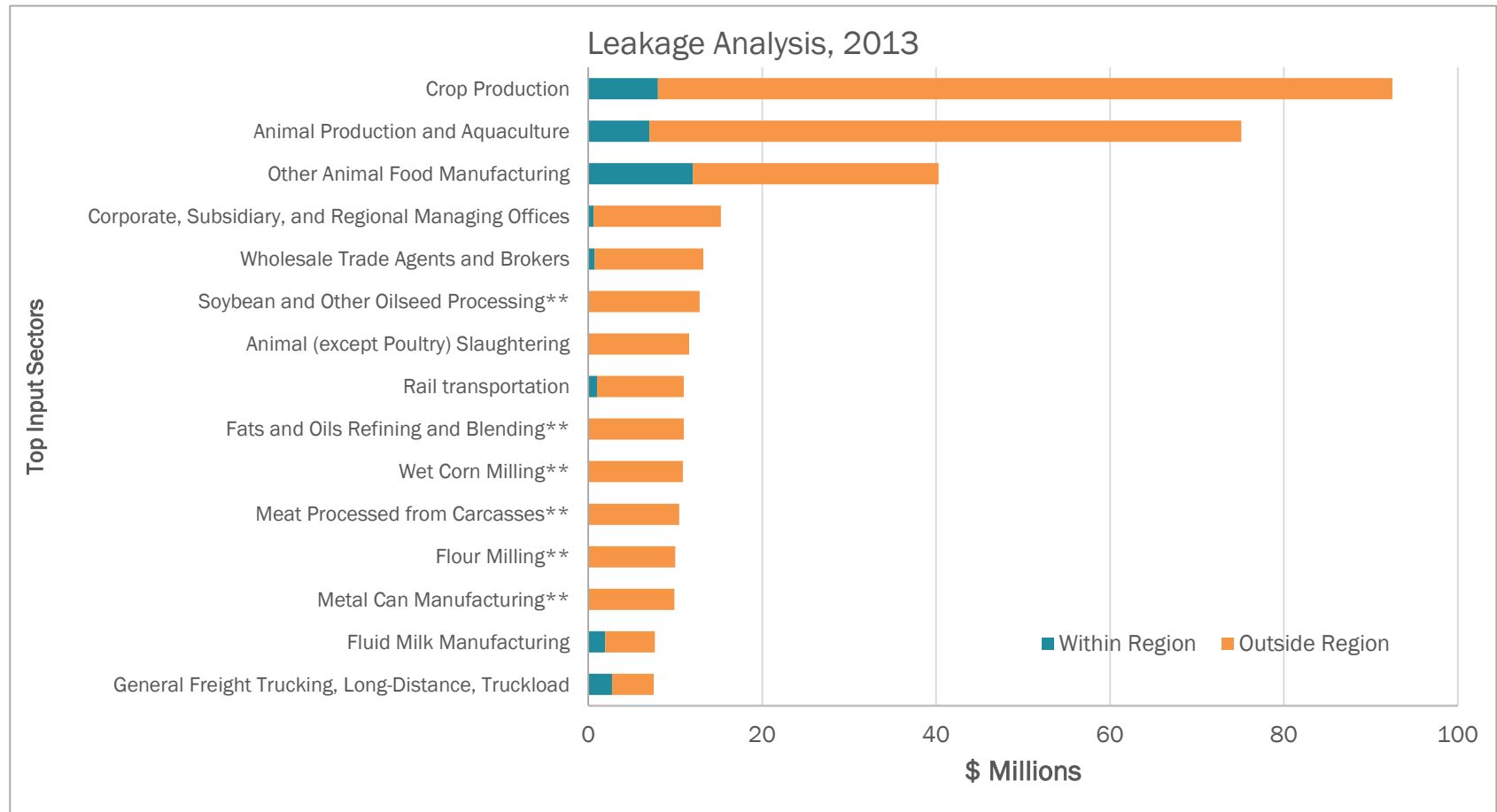
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Crop Production	\$92.5	8.7%	91.3%
Animal Production and Aquaculture	\$75.1	9.4%	90.6%
Other Animal Food Manufacturing	\$40.3	29.9%	70.1%
Corporate, Subsidiary, and Regional Managing Offices	\$15.3	4.0%	96.0%
Wholesale Trade Agents and Brokers	\$13.2	5.5%	94.5%
Soybean and Other Oilseed Processing**	\$12.8	0%	100.0%
Animal (except Poultry) Slaughtering*	\$11.6	0.2%	99.8%
Rail transportation	\$11.0	9.2%	90.8%
Fats and Oils Refining and Blending**	\$11.0	0%	100.0%
Wet Corn Milling**	\$10.9	0%	100.0%
Meat Processed from Carcasses**	\$10.5	0%	100.0%
Flour Milling**	\$10.0	0%	100.0%
Metal Can Manufacturing**	\$9.9	0%	100.0%
Fluid Milk Manufacturing	\$7.6	25.5%	74.5%
General Freight Trucking, Long-Distance, Truckload	\$7.5	36.1%	63.9%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

section 03

Top 15 Inputs by Dollars: EIRPC Region, IN

Agribusiness, Food Processing and Technology Cluster



Note: ** industry sector is not present in the region

section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations: EIRPC Region, IN

Agribusiness, Food Processing and Technology Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,331	-1.6%	\$12.6	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	332	-6.2%	\$10.7	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	101	-11.4%	\$11.9	Less than high school
Packers and Packers, Hand	83	-17.0%	\$9.9	Less than high school
Packaging and Filling Machine Operators and Tenders	80	-14.9%	\$13.2	High school diploma or equivalent
Food Batchmakers	78	-22.8%	\$10.7	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	74	-7.5%	\$22.5	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	59	-10.6%	\$17.3	Postsecondary non-degree award
Industrial Truck and Tractor Operators	53	-11.7%	\$15.8	Less than high school
Animal Trainers	51	37.8%	\$11.7	High school diploma or equivalent
Nonfarm Animal Caretakers	49	81.5%	\$10.7	Less than high school
Farm Equipment Mechanics and Service Technicians	46	15.0%	\$14.6	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	46	-9.8%	\$15.0	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	43	-14.0%	\$22.1	Postsecondary non-degree award
Agricultural Equipment Operators	42	-2.3%	\$16.1	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

section 03

Shift-Share Analysis by Top Industry Sectors: EIRPC Region, IN

Advanced Materials Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Machine Shops	669	26	50	76	↑ 249
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	534	11	-12	-1	↑ 396
Iron Foundries	392	23	1	24	↑ 60
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	379	27	26	53	-27
Other Motor Vehicle Parts Manufacturing	342	24	68	92	-65
Metal Crown, Closure, and Other Metal Stamping (except Automotive)	253	20	13	33	-48
All Other Plastics Product Manufacturing	231	32	-6	26	-212
Motor Vehicle Electrical and Electronic Equipment Manufacturing	177	8	-4	4	↑ 65
Synthetic Dye and Pigment Manufacturing	155	8	-14	-6	↑ 58
Copper Rolling, Drawing, Extruding, and Alloying	152	18	3	21	-101
Other Aluminum Rolling, Drawing, and Extruding	132	4	0	4	↑ 79
Ball and Roller Bearing Manufacturing	131	10	-4	6	-1
Mineral Wool Manufacturing	99	6	-4	2	↑ 16
Rubber Product Manufacturing for Mechanical Use	90	3	3	6	↑ 46
All Other Converted Paper Product Manufacturing	74	2	-3	-1	↑ 42

Note: Upward arrow (↑) indicates regional competitiveness.

section 03

Top 15 Inputs by Dollars: EIRPC Region, IN

Advanced Materials Cluster

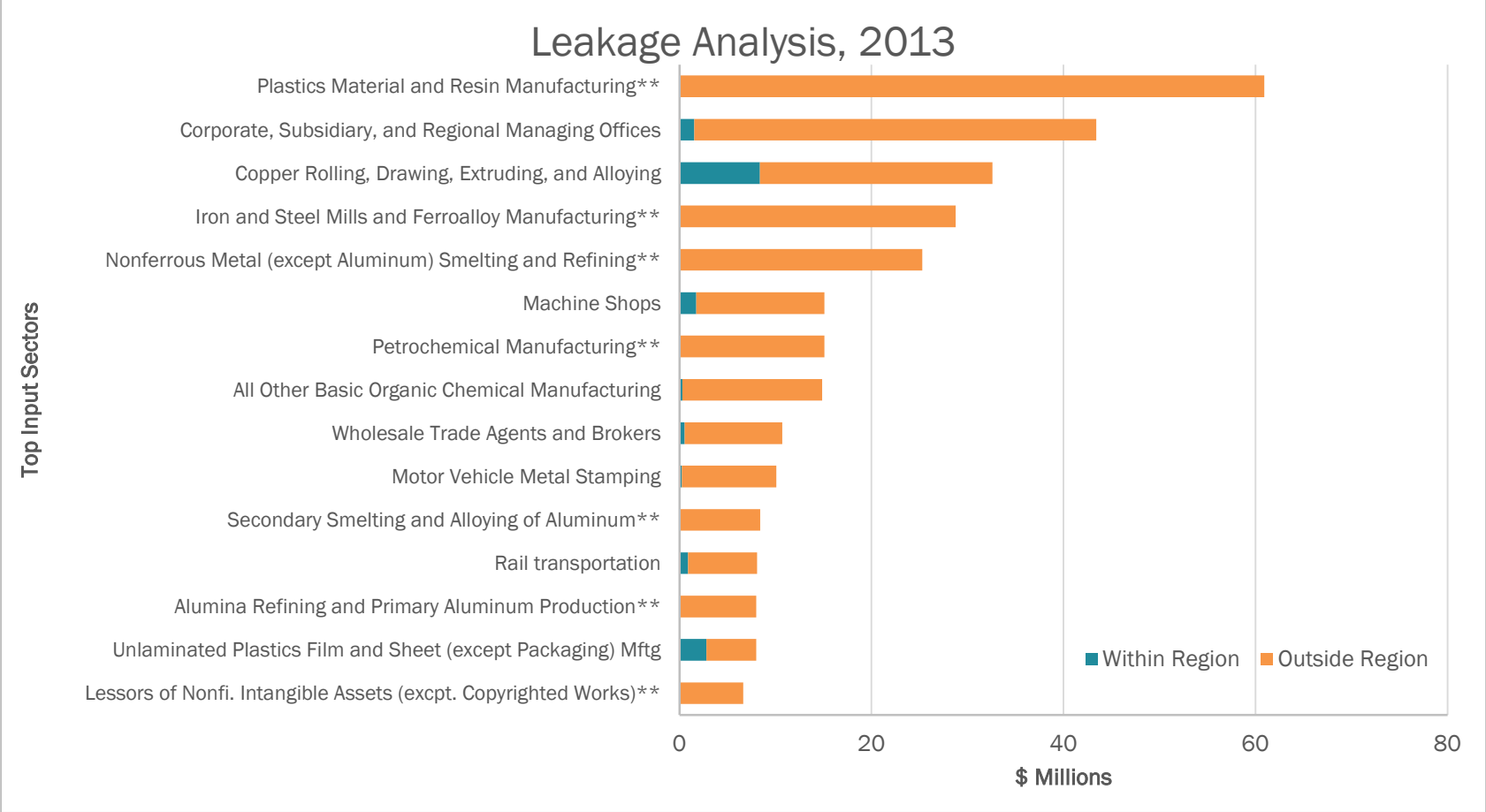
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Plastics Material and Resin Manufacturing**	\$60.9	0%	100.0%
Corporate, Subsidiary, and Regional Managing Offices	\$43.4	3.5%	96.5%
Copper Rolling, Drawing, Extruding, and Alloying	\$32.6	25.7%	74.3%
Iron and Steel Mills and Ferroalloy Manufacturing**	\$28.8	0%	100.0%
Nonferrous Metal (except Aluminum) Smelting and Refining**	\$25.3	0%	100.0%
Machine Shops	\$15.1	11.5%	88.5%
Petrochemical Manufacturing**	\$15.1	0%	100.0%
All Other Basic Organic Chemical Manufacturing	\$14.8	2.1%	97.9%
Wholesale Trade Agents and Brokers	\$10.7	5.2%	94.8%
Motor Vehicle Metal Stamping	\$10.1	2.5%	97.5%
Secondary Smelting and Alloying of Aluminum**	\$8.4	0%	100.0%
Rail transportation	\$8.1	11.2%	88.8%
Alumina Refining and Primary Aluminum Production**	\$8.0	0%	100.0%
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	\$8.0	35.0%	65.0%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)**	\$6.7	0%	100.0%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

section 03

Top 15 Inputs by Dollars: EIRPC Region, IN

Advanced Materials Cluster



Note: ** industry sector is not present in the region

Top Occupations: EIRPC Region, IN

Advanced Materials Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Machinists	370	48.6%	\$15.3	High school diploma or equivalent
Tool and Die Makers	225	6.1%	\$30.0	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	201	16.9%	\$22.1	Postsecondary non-degree award
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	193	-5.4%	\$16.4	High school diploma or equivalent
Team Assemblers	191	12.4%	\$11.2	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	144	15.2%	\$15.3	High school diploma or equivalent
Helpers--Production Workers	112	15.5%	\$11.6	Less than high school
Computer-Controlled Machine Tool Operators, Metal and Plastic	111	37.0%	\$14.2	High school diploma or equivalent
Packers and Packagers, Hand	110	3.8%	\$9.9	Less than high school
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	102	-5.6%	\$14.4	High school diploma or equivalent
Assemblers and Fabricators, All Other	100	12.4%	\$15.2	High school diploma or equivalent
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	99	1.0%	\$13.9	High school diploma or equivalent
Maintenance and Repair Workers, General	85	18.1%	\$16.2	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	76	10.1%	\$11.9	Less than high school
Industrial Machinery Mechanics	75	23.0%	\$23.5	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

section 03

Shift-Share Analysis by Top Industry Sectors: EIRPC Region, IN

Arts, Entertainment, Recreation and Visitor Industries

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Hotels (except Casino Hotels) and Motels	240	18	0	18	-13
Independent Artists, Writers, and Performers	128	11	6	17	-38
All Other Amusement and Recreation Industries	112	8	18	26	-13
Bowling Centers	111	7	-9	-2	↑ 27
Amusement and Theme Parks	101	2	2	4	↑ 67
Other Spectator Sports	84	4	4	8	↑ 18
Golf Courses and Country Clubs	77	3	-1	2	↑ 31
Fitness and Recreational Sports Centers	74	5	2	7	↑ 3
Radio Stations	64	6	-3	3	-14
Motion Picture Theaters (except Drive-Ins)	37	5	-12	-7	-22
Racetracks	33	6	-5	1	-51
RV (Recreational Vehicle) Parks and Campgrounds	32	2	2	4	↑ 9
Sporting and Athletic Goods Manufacturing	31	1	-2	-1	↑ 17
Other Performing Arts Companies	30	2	1	3	↑ 3
Amusement Arcades	23	1	0	1	↑ 11

Note: Upward arrow (↑) indicates regional competitiveness.

section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars: EIRPC Region, IN

Arts, Entertainment, Recreation and Visitor Industries

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$1.50	3.7%	96.3%
Sports Teams and Clubs*	\$1.17	5.7%	94.3%
Television Broadcasting	\$1.15	12.6%	87.4%
Lessors of Residential Buildings and Dwellings	\$0.85	19.3%	80.7%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.78	15.6%	84.4%
Independent Artists, Writers, and Performers	\$0.62	9.4%	90.6%
Offices of Real Estate Agents and Brokers	\$0.60	12.2%	87.8%
Advertising Agencies*	\$0.58	2.7%	97.3%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)**	\$0.51	0%	100.0%
Radio Stations	\$0.47	81.9%	18.1%
Internet Publishing and Broadcasting and Web Search Portals	\$0.45	2.7%	97.3%
Other Activities Related to Real Estate	\$0.42	9.3%	90.7%
Cable and Other Subscription Programming	\$0.41	0.5%	99.5%
Offices of Lawyers	\$0.39	6.3%	93.7%
Cheese Manufacturing	\$0.35	6.2%	93.8%

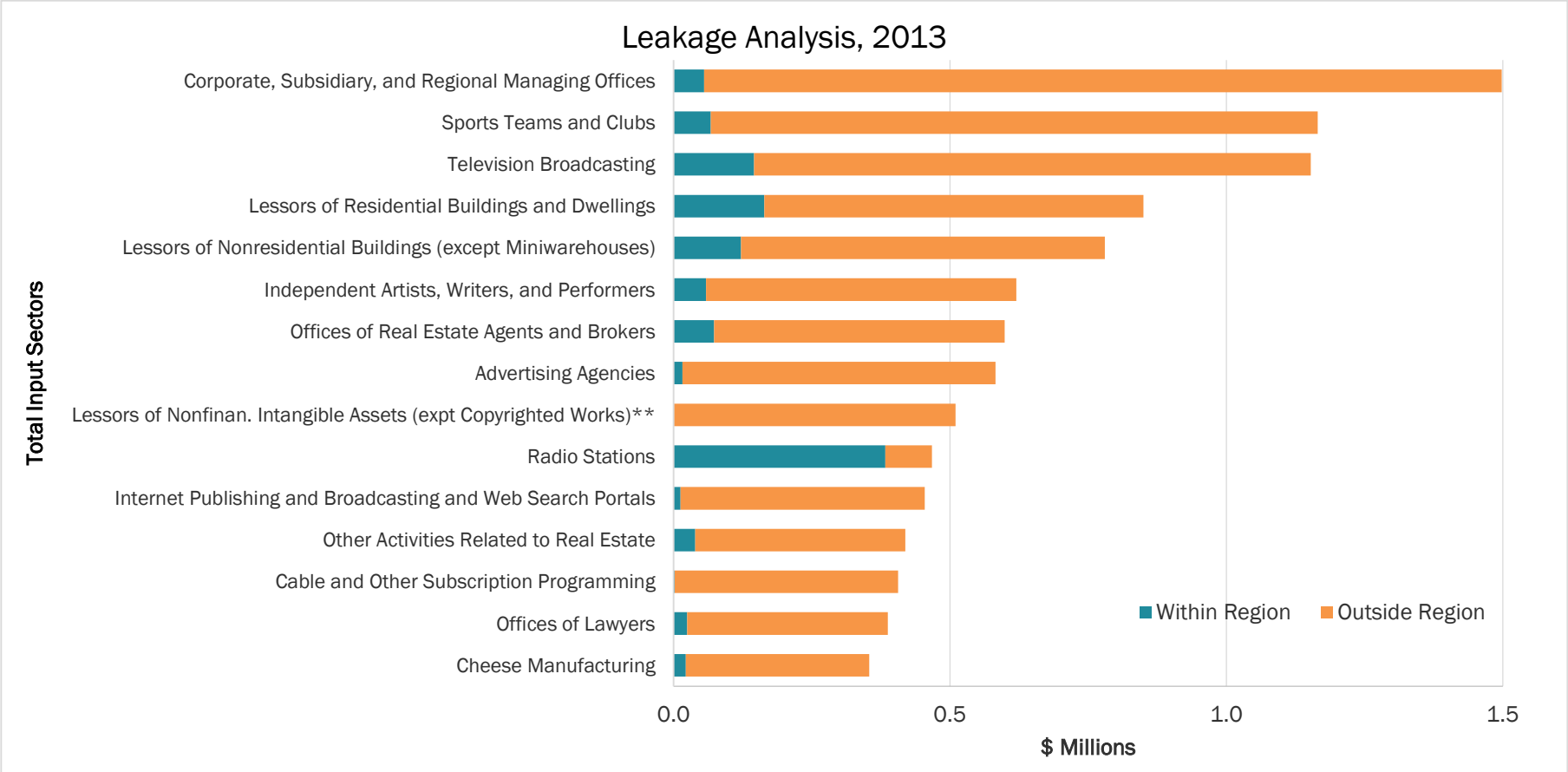
Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars: EIRPC Region, IN

Arts, Entertainment, Recreation and Visitor Industries



Note: ** industry sector is not present in the region

section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations: EIRPC Region, IN

Arts, Entertainment, Recreation and Visitor Industries

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Amusement and Recreation Attendants	120	46.3%	\$9.3	Less than high school
Musicians and Singers	67	21.8%	\$17.0	High school diploma or equivalent
Maids and Housekeeping Cleaners	66	3.1%	\$8.4	Less than high school
Recreation Workers	53	39.5%	\$11.8	Bachelor's degree
Hotel, Motel, and Resort Desk Clerks	47	-2.1%	\$8.8	High school diploma or equivalent
Writers and Authors	46	7.0%	\$15.4	Bachelor's degree
Waiters and Waitresses	33	0%	\$9.2	Less than high school
Coaches and Scouts	33	0%	\$10.1	Bachelor's degree
Landscaping and Groundskeeping Workers	32	0%	\$9.3	Less than high school
Lodging Managers	32	23.1%	\$13.0	High school diploma or equivalent
Cashiers	26	-13.3%	\$9.3	Less than high school
Maintenance and Repair Workers, General	25	4.2%	\$16.2	High school diploma or equivalent
Fitness Trainers and Aerobics Instructors	22	29.4%	\$11.2	High school diploma or equivalent
Radio and Television Announcers	22	-8.3%	\$11.2	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	21	10.5%	\$11.0	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014

section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Report Contributors

This report was prepared by the Purdue Center for Regional Development, in partnership with the Southern Rural Development Center and USDA Rural Development, in support of the Stronger Economies Together program.



Report Authors

Bo Beaulieu, PhD
Indraneel Kumar, PhD
Andrey Zhalnin, PhD



Data Analysis

Ayoung Kim
Francisco Scott



Report Design

Tyler Wright

This report was supported, in part, by grant from the USDA Rural Development through the auspices of the Southern Rural Development Center. It was produced in support of the Stronger Economies Together (SET) program.

PURDUE
UNIVERSITY



Center for Regional Development
Advancing Collaboration : Energizing Regions

The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

For more information,
please contact:

Dr. Bo Beaulieu,
PCRD Director:
ljb@purdue.edu

Or

765-494-7273

December 2015