



Regional Data Snapshot

Target Industry Clusters
SET Session 2

Ozark Foothills Region, Missouri

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01 overview

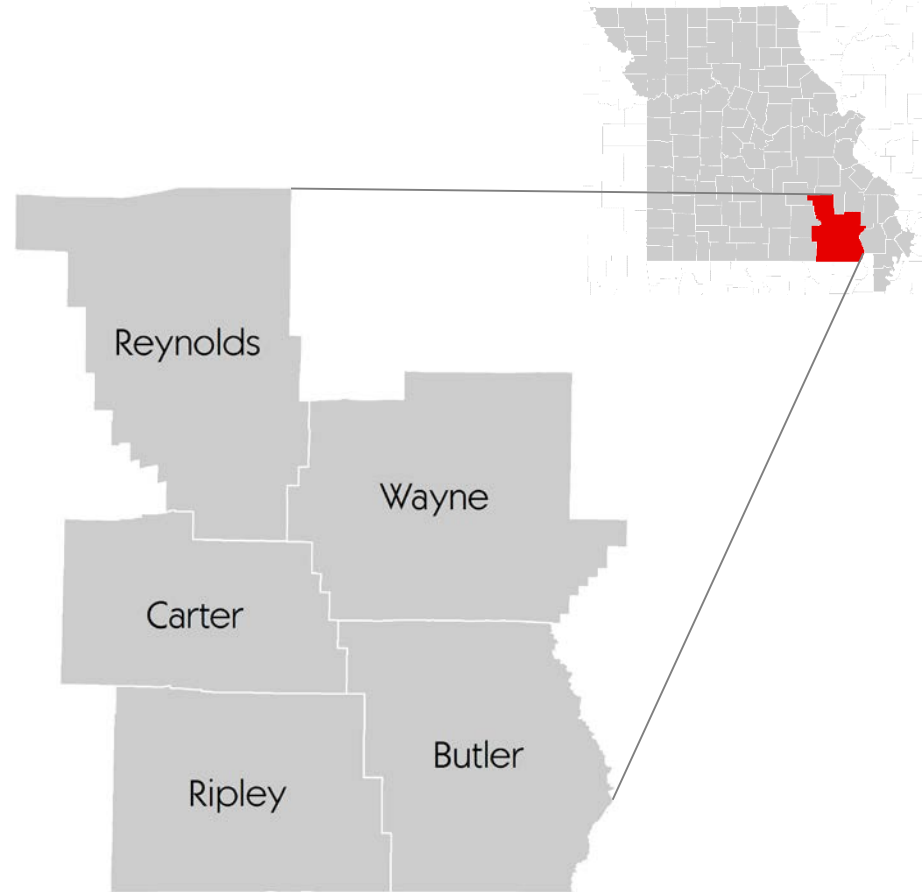
Ozark Foothills, MO

Overview

Ozark Foothills Region, MO

The Ozark Foothills Region is comprised of 5 Missouri counties. State Highway 60 connects the region to I-55 in the East.

- Butler
- Carter
- Reynolds
- Ripley
- Wayne



02 target industry clusters

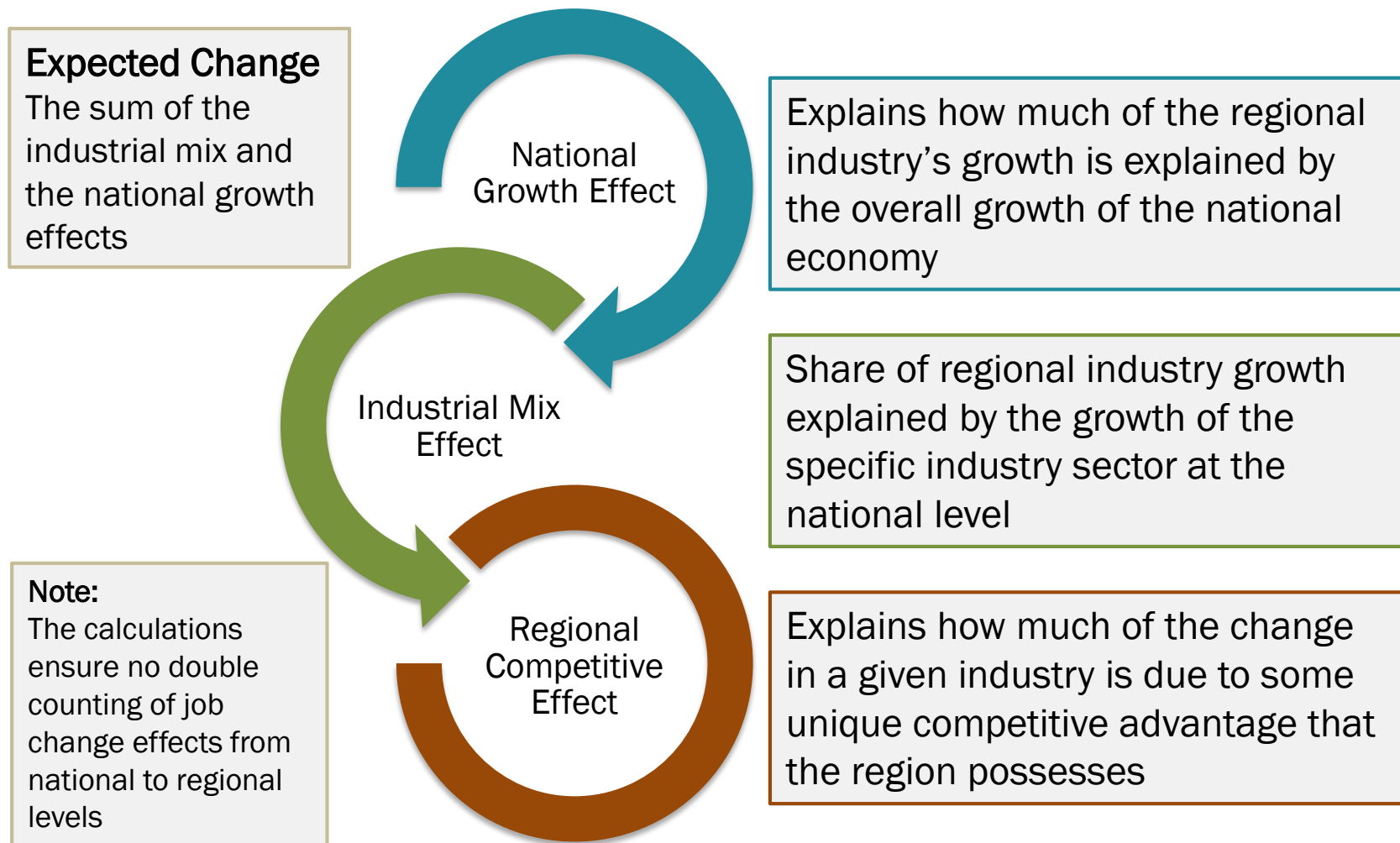
**Agribusiness, Food Processing
and Technology**

**Biomedical/Biotechnical (Life
Sciences)**

Forest and Wood Products

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Crop Production	1,036	60	-46	14	354	↑ 340
Animal Production and Aquaculture	835	110	-130	-20	-427	-407
Frozen Specialty Food Manufacturing	212	13	-4	9	62	↑ 53
Farm Supplies Merchant Wholesalers	61	4	-1	3	20	↑ 17
Farm Labor Contractors and Crew Leaders	60	4	4	8	18	↑ 10
Soil Preparation, Planting, and Cultivating	57	3	0	3	24	↑ 21
Farm and Garden Machinery and Equipment Merchant Wholesalers	54	5	-2	3	-2	-5
Spice and Extract Manufacturing	30	2	2	4	12	↑ 8
Ice Manufacturing	19	2	-3	-1	1	↑ 2
Farm Machinery and Equipment Manufacturing	18	0	0	0	17	↑ 17
Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	15	0	0	0	12	↑ 12
Retail Bakeries	12	0	1	1	10	↑ 9

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient number of jobs for Nitrogenous Fertilizer Manufacturing; Breweries; and Perishable Prepared Food Manufacturing.

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Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Crop Production
- Farm Labor Contractors and Crew Leaders
- Farm Machinery and Equipment Manufacturing
- Farm Supplies Merchant Wholesalers
- Frozen Specialty Food Manufacturing
- Ice Manufacturing
- Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing
- Retail Bakeries
- Soil Preparation, Planting, and Cultivating
- Spice and Extract Manufacturing

Industries that Underperformed

- Animal Production and Aquaculture
- Farm and Garden Machinery and Equipment Merchant Wholesalers

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
Crop Production	\$72.7	1,054	\$68,957	3.4
Animal Production and Aquaculture	\$149.3	817	\$182,721	3.5
Frozen Specialty Food Manufacturing	\$24.1	194	\$123,950	17.4
Farm Supplies Merchant Wholesalers	\$3.4	40	\$84,324	2.5
Farm Labor Contractors and Crew Leaders	\$0.1	60	\$2,453	0.9
Soil Preparation, Planting, and Cultivating	\$1.1	54	\$20,209	3.9
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$6.5	50	\$129,033	2.4
Spice and Extract Manufacturing	\$8.2	39	\$210,645	5.8
Ice Manufacturing	\$5.5	24	\$225,030	10.9
Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	\$2.7	17	\$156,566	4.2

Note: Sorted similarly as the shift-share analysis slide. EMSI does not show sufficient number of jobs for Farm Machinery and Equipment Manufacturing; Retail Bakeries; Nitrogenous Fertilizer Manufacturing; Breweries; and Perishable Prepared Food Manufacturing.

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Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

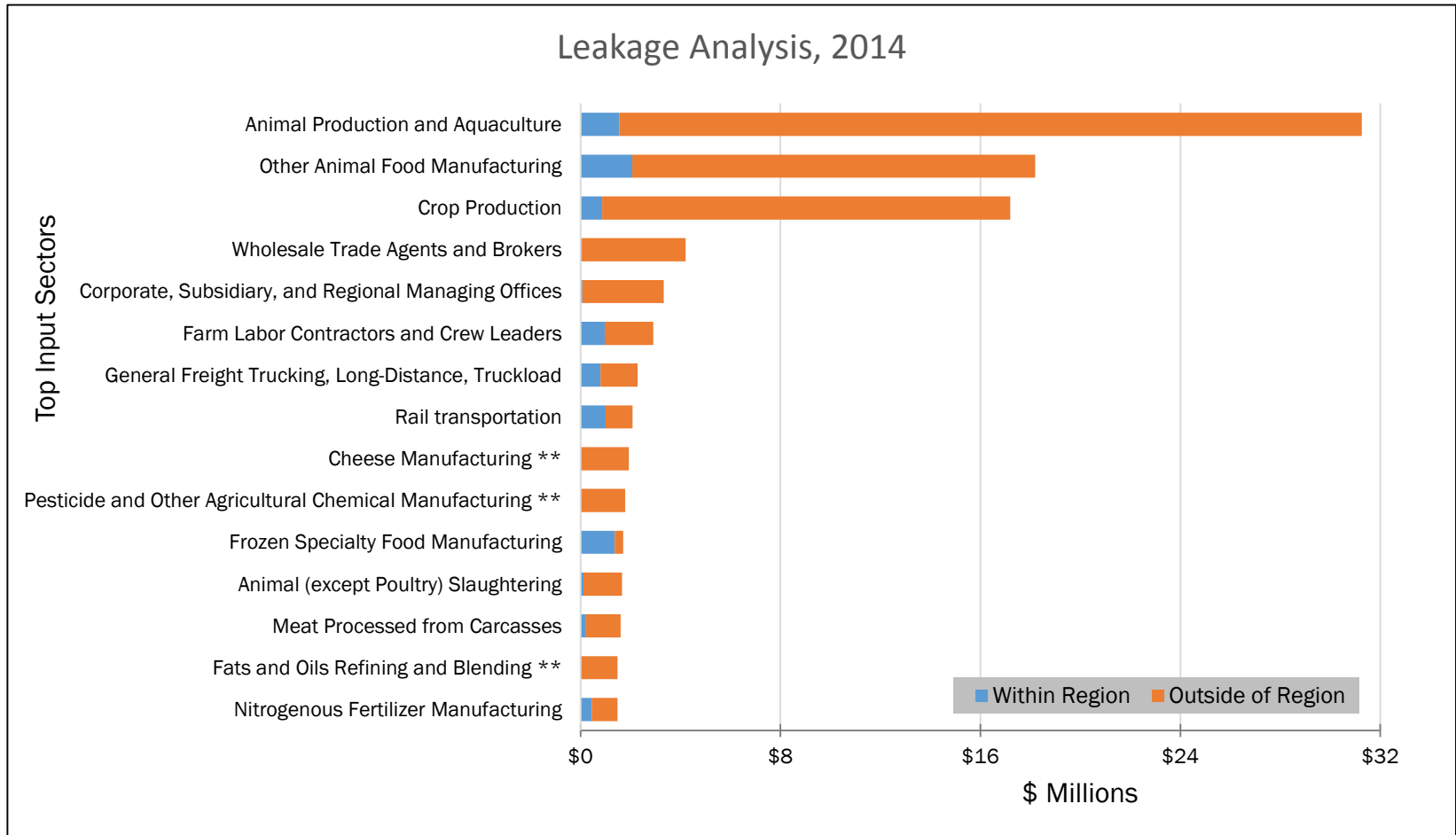
Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Animal Production and Aquaculture	\$31.26	5%	95%
Other Animal Food Manufacturing *	\$18.19	11%	89%
Crop Production	\$17.19	5%	95%
Wholesale Trade Agents and Brokers	\$4.20	1%	99%
Corporate, Subsidiary, and Regional Managing Offices	\$3.33	2%	98%
Farm Labor Contractors and Crew Leaders	\$2.91	33%	67%
General Freight Trucking, Long-Distance, Truckload	\$2.28	35%	65%
Rail transportation	\$2.08	48%	52%
Cheese Manufacturing **	\$1.93	0%	100%
Pesticide and Other Agricultural Chemical Manufacturing **	\$1.78	0%	100%
Frozen Specialty Food Manufacturing	\$1.71	80%	20%
Animal (except Poultry) Slaughtering *	\$1.66	7%	93%
Meat Processed from Carcasses *	\$1.60	13%	87%
Fats and Oils Refining and Blending **	\$1.48	0%	100%
Nitrogenous Fertilizer Manufacturing *	\$1.48	30%	70%

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

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Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology



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

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	1,571	-7%	\$10.6	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	191	32%	\$9.0	No formal educational credential
Agricultural Equipment Operators	31	35%	\$11.0	No formal educational credential
Packaging and Filling Machine Operators and Tenders	28	33%	\$11.9	High school diploma or equivalent
Helpers-Production Workers	28	56%	\$9.0	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	25	25%	\$10.3	No formal educational credential
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	23	44%	\$19.5	High school diploma or equivalent
Team Assemblers	23	77%	\$11.7	High school diploma or equivalent
Nonfarm Animal Caretakers	23	0%	\$12.3	High school diploma or equivalent
Animal Trainers	22	-31%	\$11.6	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	20	33%	\$16.2	Postsecondary non degree award
Bookkeeping, Accounting, and Auditing Clerks	18	0%	\$14.7	Some college, no degree
Farmworkers, Farm, Ranch, and Aquacultural Animals	18	20%	\$10.2	No formal educational credential
Food Batchmakers	18	50%	\$14.9	High school diploma or equivalent
Industrial Truck and Tractor Operators	17	42%	\$15.5	No formal educational credential

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

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Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Biomedical/Biotechnical (Life Sciences)

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
General Medical and Surgical Hospitals	1,061	89	-53	36	47	↑ 11
Nursing Care Facilities (Skilled Nursing Facilities)	731	58	-58	0	64	↑ 64
Home Health Care Services	491	27	66	93	186	↑ 93
Medical Laboratories	238	14	24	38	80	↑ 42
Pharmacies and Drug Stores	225	16	-17	-1	46	↑ 47
Assisted Living Facilities for the Elderly	103	16	18	34	-80	-114
Residential Intellectual and Developmental Disability Facilities	99	9	-2	7	-5	-12
Ambulance Services	69	8	1	9	-26	-35
Kidney Dialysis Centers	43	2	6	8	18	↑ 10
Other Residential Care Facilities	43	0	-1	-1	36	↑ 37
Psychiatric and Substance Abuse Hospitals	40	0	0	0	40	↑ 40
Outpatient Mental Health and Substance Abuse Centers	37	2	5	7	9	↑ 2
Cosmetics, Beauty Supplies, and Perfume Stores	30	3	2	5	-4	-9
All Other Outpatient Care Centers	18	0	1	1	16	↑ 15
All Other Health and Personal Care Stores	17	1	0	1	11	↑ 10

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Biomedical/Biotechnical (Life Sciences)

Industries that Outperformed

- 
- All Other Health and Personal Care Stores
 - All Other Outpatient Care Centers
 - General Medical and Surgical Hospitals
 - Home Health Care Services
 - Kidney Dialysis Centers
 - Medical Laboratories
 - Nursing Care Facilities (Skilled Nursing Facilities)
 - Other Residential Care Facilities
 - Outpatient Mental Health and Substance Abuse Centers
 - Pharmacies and Drug Stores
 - Psychiatric and Substance Abuse Hospitals

Industries that Underperformed

- 
- Ambulance Services
 - Assisted Living Facilities for the Elderly
 - Cosmetics, Beauty Supplies, and Perfume Stores
 - Residential Intellectual and Developmental Disability Facilities

Top Industry Sectors

Biomedical/Biotechnical (Life Sciences)

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
General Medical and Surgical Hospitals	\$36.5	900	\$40,555	1.1
Nursing Care Facilities (Skilled Nursing Facilities)	\$24.8	748	\$33,090	2.1
Home Health Care Services	\$7.0	415	\$16,883	1.3
Medical Laboratories	\$7.0	197	\$35,609	5.6
Pharmacies and Drug Stores	\$16.4	232	\$70,499	1.5
Assisted Living Facilities for the Elderly	\$4.1	192	\$21,297	1.1
Residential Intellectual and Developmental Disability Facilities	\$2.0	117	\$17,140	1.1
Ambulance Services	\$7.2	65	\$110,634	1.8
Kidney Dialysis Centers	\$4.6	37	\$123,399	1.7
Other Residential Care Facilities	\$7.2	131	\$55,128	1.2
Psychiatric and Substance Abuse Hospitals	\$0.3	21	\$14,591	1.7
Outpatient Mental Health and Substance Abuse Centers	\$2.1	41	\$52,229	0.8
Cosmetics, Beauty Supplies, and Perfume Stores	\$0.3	29	\$10,683	0.7
All Other Outpatient Care Centers	\$2.4	17	\$141,616	0.6
All Other Health and Personal Care Stores	\$0.7	18	\$38,566	0.9

Note: Sorted similarly as the shift-share analysis slide.

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Top 15 Inputs by Dollars

Biomedical/Biotechnical (Life Sciences)

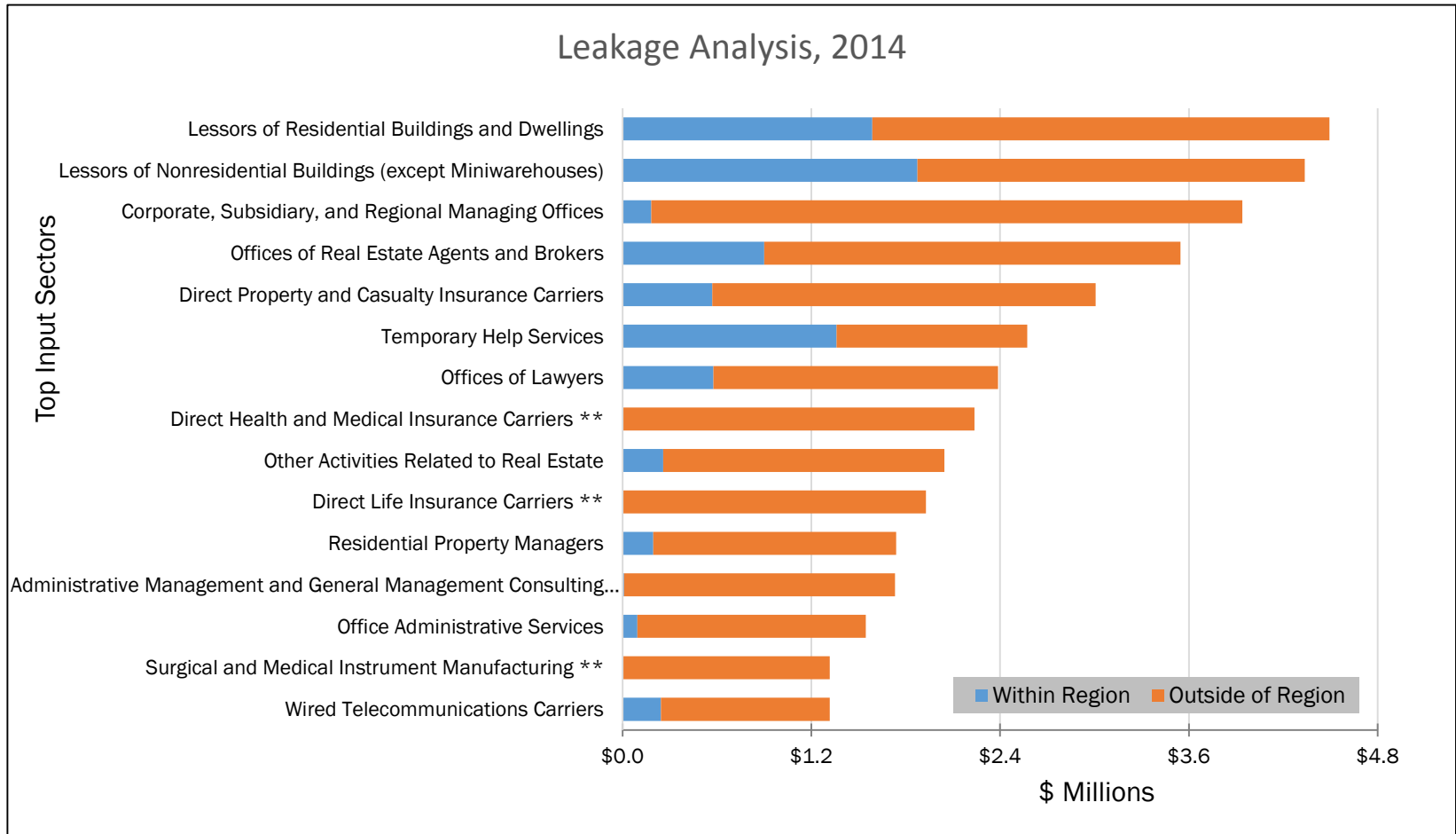
Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Lessors of Residential Buildings and Dwellings	\$4.49	35%	65%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$4.34	43%	57%
Corporate, Subsidiary, and Regional Managing Offices	\$3.94	5%	95%
Offices of Real Estate Agents and Brokers	\$3.55	25%	75%
Direct Property and Casualty Insurance Carriers	\$3.01	19%	81%
Temporary Help Services	\$2.57	53%	47%
Offices of Lawyers	\$2.39	24%	76%
Direct Health and Medical Insurance Carriers **	\$2.24	0%	100%
Other Activities Related to Real Estate	\$2.05	13%	87%
Direct Life Insurance Carriers **	\$1.93	0%	100%
Residential Property Managers	\$1.74	11%	89%
Administrative Management and General Management Consulting Services *	\$1.73	1%	99%
Office Administrative Services	\$1.55	6%	94%
Surgical and Medical Instrument Manufacturing **	\$1.32	0%	100%
Wired Telecommunications Carriers	\$1.32	19%	81%

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

section 02

Top 15 Inputs by Dollars

Biomedical/Biotechnical (Life Sciences)



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

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Top Occupations

Biomedical/Biotechnical (Life Sciences)

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Registered Nurses	523	15%	\$22.8	Bachelor's degree
Nursing Assistants	439	0%	\$9.3	Postsecondary non degree award
Personal Care Aides	193	10%	\$9.1	No formal educational credential
Licensed Practical and Licensed Vocational Nurses	187	9%	\$16.5	Postsecondary non degree award
Pharmacy Technicians	108	26%	\$12.8	High school diploma or equivalent
Home Health Aides	100	9%	\$10.6	No formal educational credential
Emergency Medical Technicians and Paramedics	89	-11%	\$16.3	Postsecondary non degree award
Phlebotomists	88	40%	\$10.2	Postsecondary non degree award
Maids and Housekeeping Cleaners	78	-9%	\$8.2	No formal educational credential
Cooks, Institution and Cafeteria	77	-19%	\$9.2	No formal educational credential
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	60	11%	\$12.2	High school diploma or equivalent
Medical and Clinical Laboratory Technologists	53	26%	\$19.3	Bachelor's degree
Cashiers	51	21%	\$9.2	No formal educational credential
Medical Secretaries	51	16%	\$11.0	High school diploma or equivalent
Medical and Clinical Laboratory Technicians	49	29%	\$15.9	Associate's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Forest and Wood Products

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Sawmills	397	28	6	34	82	↑ 48
Logging	282	23	46	69	23	-46
Wood Container and Pallet Manufacturing	190	13	12	25	41	↑ 16
Finish Carpentry Contractors	83	5	-4	1	30	↑ 29
Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing	77	7	-10	-3	-2	↑ 1
Flooring Contractors	55	6	-4	2	-18	-20
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	34	3	-3	0	2	↑ 2
Siding Contractors	30	3	-5	-2	-2	0
Wood Kitchen Cabinet and Countertop Manufacturing	28	2	-1	1	10	↑ 9
Timber Tract Operations	26	1	3	4	21	↑ 17
Cut Stock, Resawing Lumber, and Planing	25	3	2	5	-9	-14
Support Activities for Forestry	21	3	-4	-1	-11	-10
Nonupholstered Wood Household Furniture Manufacturing	20	0	0	0	20	↑ 20
Roofing Contractors	19	3	0	3	-14	-17
Forest Nurseries and Gathering of Forest Products	12	0	0	0	8	↑ 8

Note: Upward arrow (↑) indicates regional competitiveness.

section 02

Shift-Share Analysis

Forest and Wood Products

Industries that Outperformed

- Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing
- Finish Carpentry Contractors
- Forest Nurseries and Gathering of Forest Products
- Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
- Nonupholstered Wood Household Furniture Manufacturing
- Sawmills
- Timber Tract Operations
- Wood Container and Pallet Manufacturing
- Wood Kitchen Cabinet and Countertop Mfg.

Industries that Underperformed

- Cut Stock, Resawing Lumber, and Planing
- Flooring Contractors
- Logging
- Roofing Contractors
- Support Activities for Forestry

Top Industry Sectors

Forest and Wood Products

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
Sawmills	\$65.9	370	\$178,052	20.4
Logging	\$16.0	284	\$56,351	10.2
Wood Container and Pallet Manufacturing	\$19.2	186	\$103,243	13.0
Finish Carpentry Contractors	\$1.0	80	\$12,312	1.1
Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing	\$62.2	77	\$807,980	116.9
Flooring Contractors	\$1.0	51	\$18,864	1.3
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	\$3.5	30	\$115,742	1.6
Siding Contractors	\$1.0	30	\$34,250	2.1
Wood Kitchen Cabinet and Countertop Manufacturing	\$1.0	29	\$33,958	1.0
Timber Tract Operations	\$0.1	23	\$3,791	12.7
Cut Stock, Resawing Lumber, and Planing	\$3.2	30	\$108,405	7.0
Support Activities for Forestry	\$0.4	23	\$16,773	3.0
Nonupholstered Wood Household Furniture Manufacturing	\$1.1	19	\$54,954	2.4
Roofing Contractors	\$0.3	19	\$16,394	0.3
Forest Nurseries and Gathering of Forest Products	\$0.2	10	\$23,090	11.0

Note: Sorted similarly as the shift-share analysis slide.

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Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Forest and Wood Products

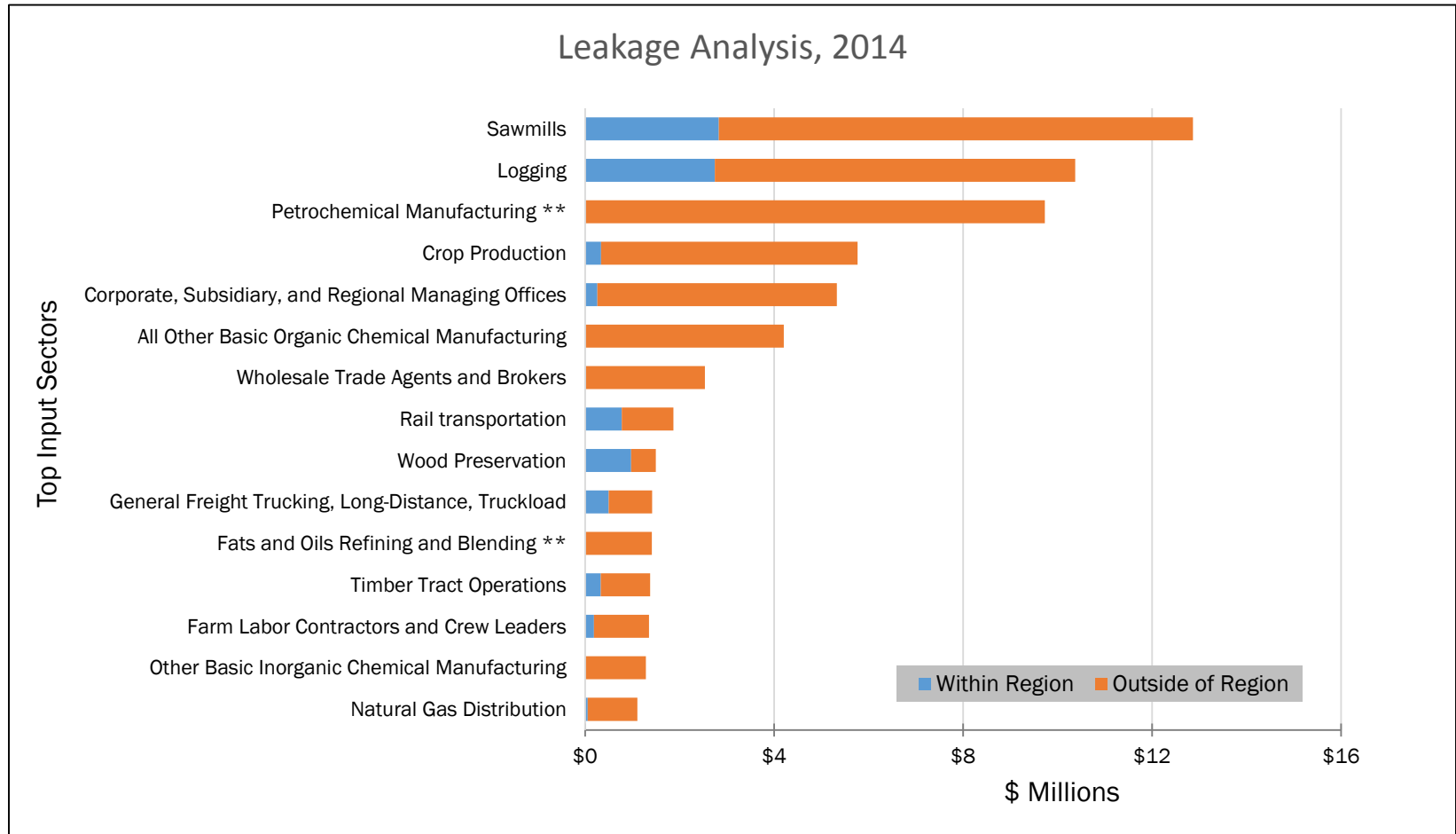
Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Sawmills	\$12.86	22%	78%
Logging	\$10.37	26%	74%
Petrochemical Manufacturing **	\$9.73	0%	100%
Crop Production	\$5.77	6%	94%
Corporate, Subsidiary, and Regional Managing Offices	\$5.32	5%	95%
All Other Basic Organic Chemical Manufacturing *	\$4.21	0%	100%
Wholesale Trade Agents and Brokers	\$2.53	1%	99%
Rail transportation	\$1.87	41%	59%
Wood Preservation	\$1.49	65%	35%
General Freight Trucking, Long-Distance, Truckload	\$1.42	35%	65%
Fats and Oils Refining and Blending **	\$1.41	0%	100%
Timber Tract Operations *	\$1.38	24%	76%
Farm Labor Contractors and Crew Leaders	\$1.35	14%	86%
Other Basic Inorganic Chemical Manufacturing *	\$1.28	0%	100%
Natural Gas Distribution	\$1.11	5%	95%

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

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Top 15 Inputs by Dollars

Forest and Wood Products



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

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Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Forest and Wood Products

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Logging Equipment Operators	180	10%	\$13.0	High school diploma or equivalent
Sawing Machine Setters, Operators, and Tenders, Wood	131	30%	\$13.1	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	51	9%	\$10.3	No formal educational credential
Carpenters	49	-2%	\$12.3	High school diploma or equivalent
Team Assemblers	47	7%	\$11.7	High school diploma or equivalent
Managers, All Other	46	100%	\$17.4	Bachelor's degree
Heavy and Tractor-Trailer Truck Drivers	45	45%	\$16.2	Postsecondary non degree award
Construction Laborers	43	26%	\$12.4	No formal educational credential
First-Line Supervisors of Farming, Fishing, and Forestry Workers	41	17%	\$14.6	High school diploma or equivalent
Fallers	41	3%	\$14.2	High school diploma or equivalent
Helpers--Production Workers	30	11%	\$9.0	No formal educational credential
First-Line Supervisors of Production and Operating Workers	27	4%	\$20.6	High school diploma or equivalent
Industrial Truck and Tractor Operators	27	13%	\$15.5	No formal educational credential
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	26	0%	\$10.5	High school diploma or equivalent
Cabinetmakers and Bench Carpenters	23	44%	\$12.3	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

03 Cluster Comparisons

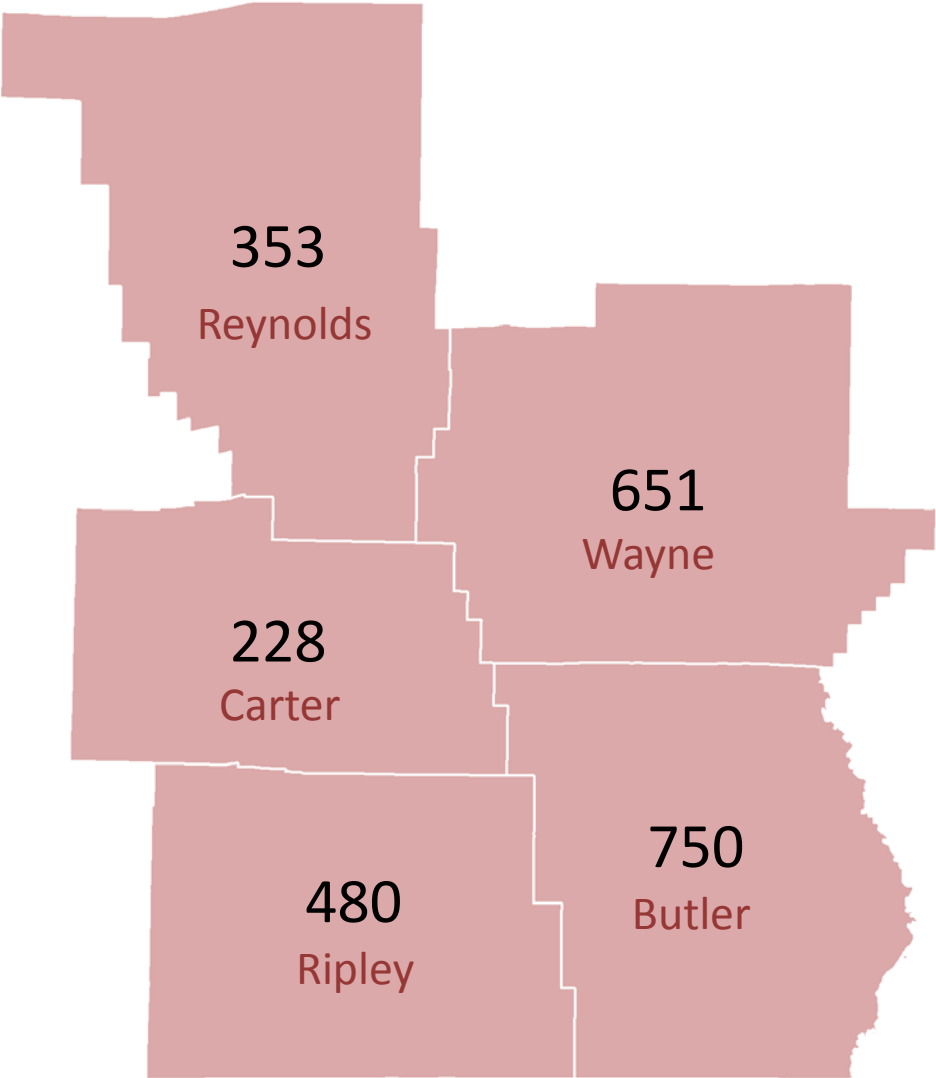
**Agribusiness, Food Processing
and Technology**

**Biomedical/Biotechnical (Life
Sciences)**

Forest and Wood Products

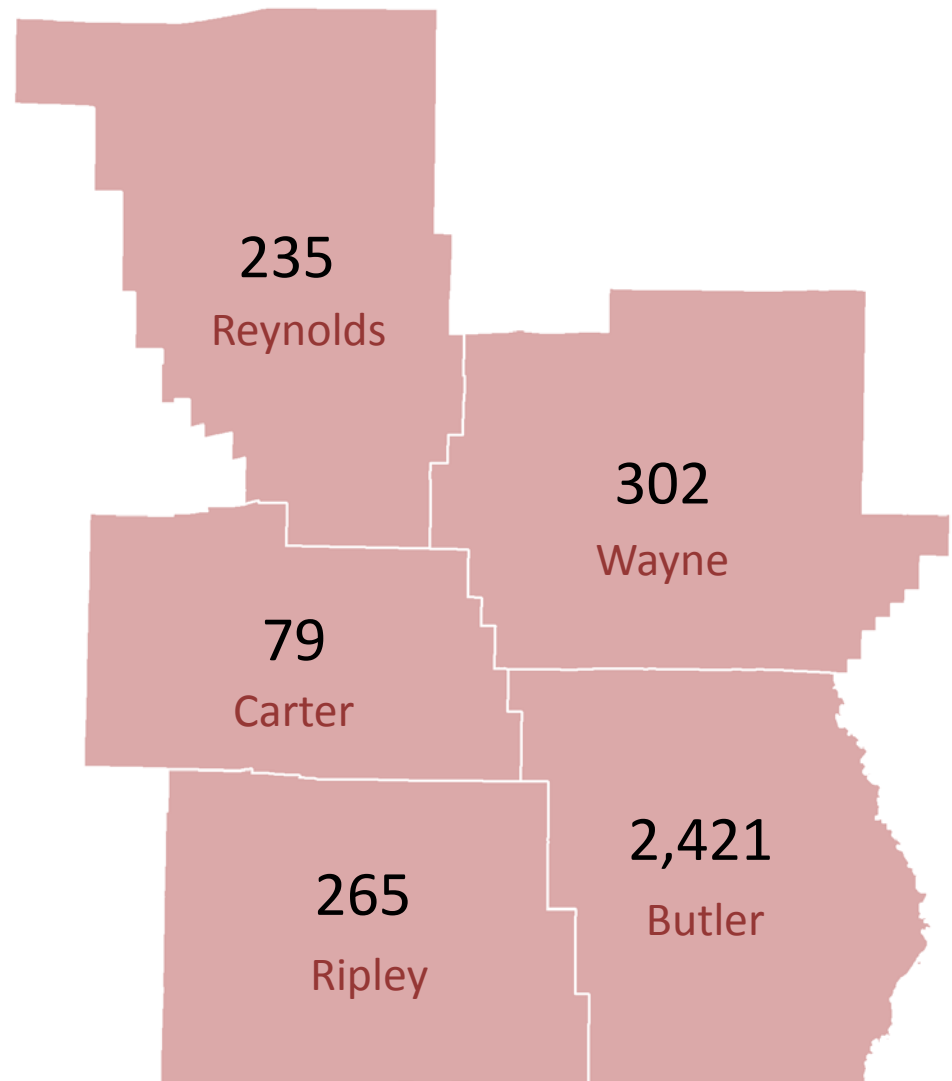
Agribusiness, Food Processing and Technology

Contribution by
Counties (Jobs, 2015)



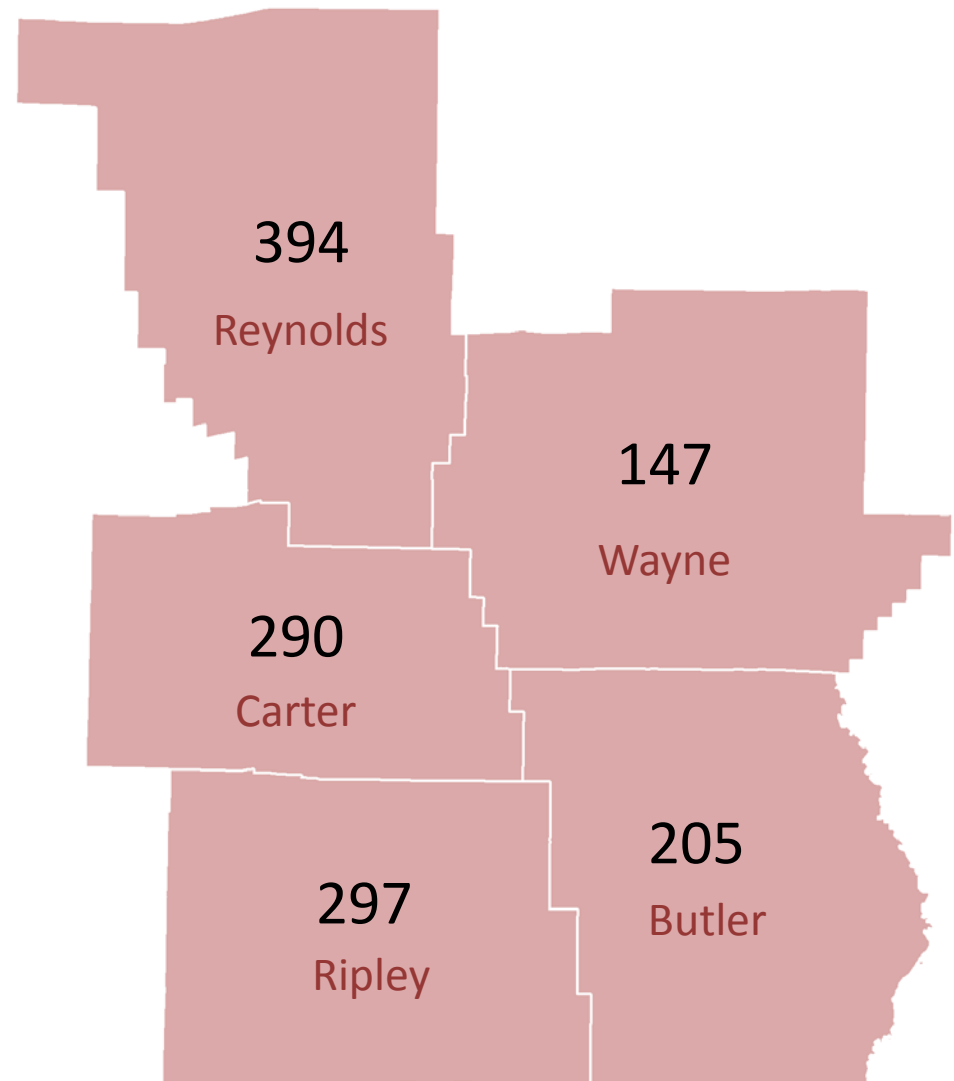
Biomedical/Biotechnical (Life Sciences)

Contribution by Counties (Jobs, 2015)



Forest and Wood Products

Contribution by Counties (Jobs, 2015)



Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology	Biomedical/Biotechnical (Life Sciences)	Forest and Wood Products
Regional Performance, 2009-2015 (Shift-share analysis)	23 (positive value)	-38 (negative value)	0
Export value, 2014	\$305,581,590	\$128,282,503	\$179,179,941
Leakage, 2014	\$163,875,034	\$79,769,221	\$100,537,040
Number of establishments, 2015	86	104	102
Contribution by counties	5	5	5

Business input	Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.
Resident's value	Review Civic Forum Input from Residents

section 03