



Regional Data Snapshot

Target Industry Clusters

**Southern Indiana Development Commission + Dubois
County**

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01 overview

Daviess, IN

Greene, IN

Knox, IN

Lawrence, IN

Martin, IN

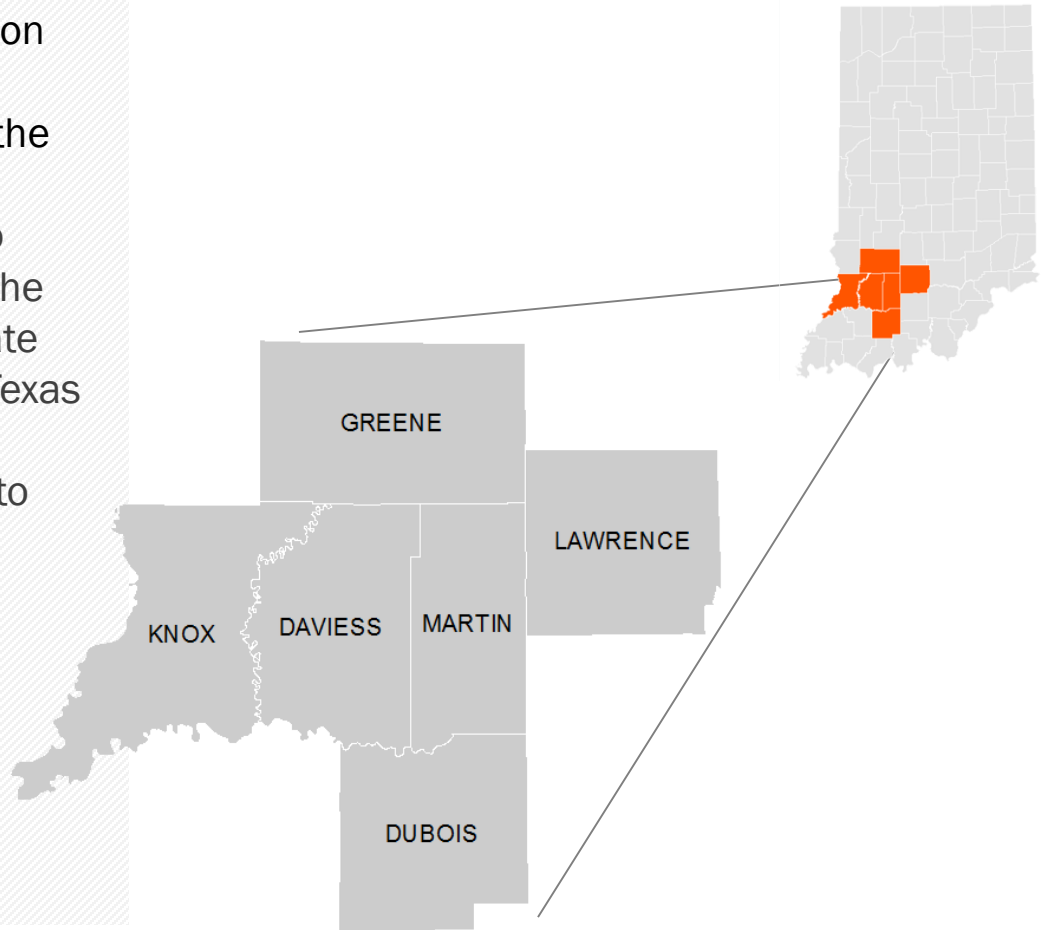
Dubois, IN

Overview

Southern Indiana Development Commission

The region is comprised of Southern Indiana Development Commission (SIDC) Region as well as Dubois County. Interstate 69 connects the region to Bloomington and Indianapolis in the north, and to Interstate 64 and Evansville in the south. Once completed, Interstate 69 would connect Michigan to Texas and the international border in Mexico. Martin County is home to Crane Division, Naval Surface Warfare Center.

- Daviess
- Greene
- Knox
- Lawrence
- Martin
- Dubois



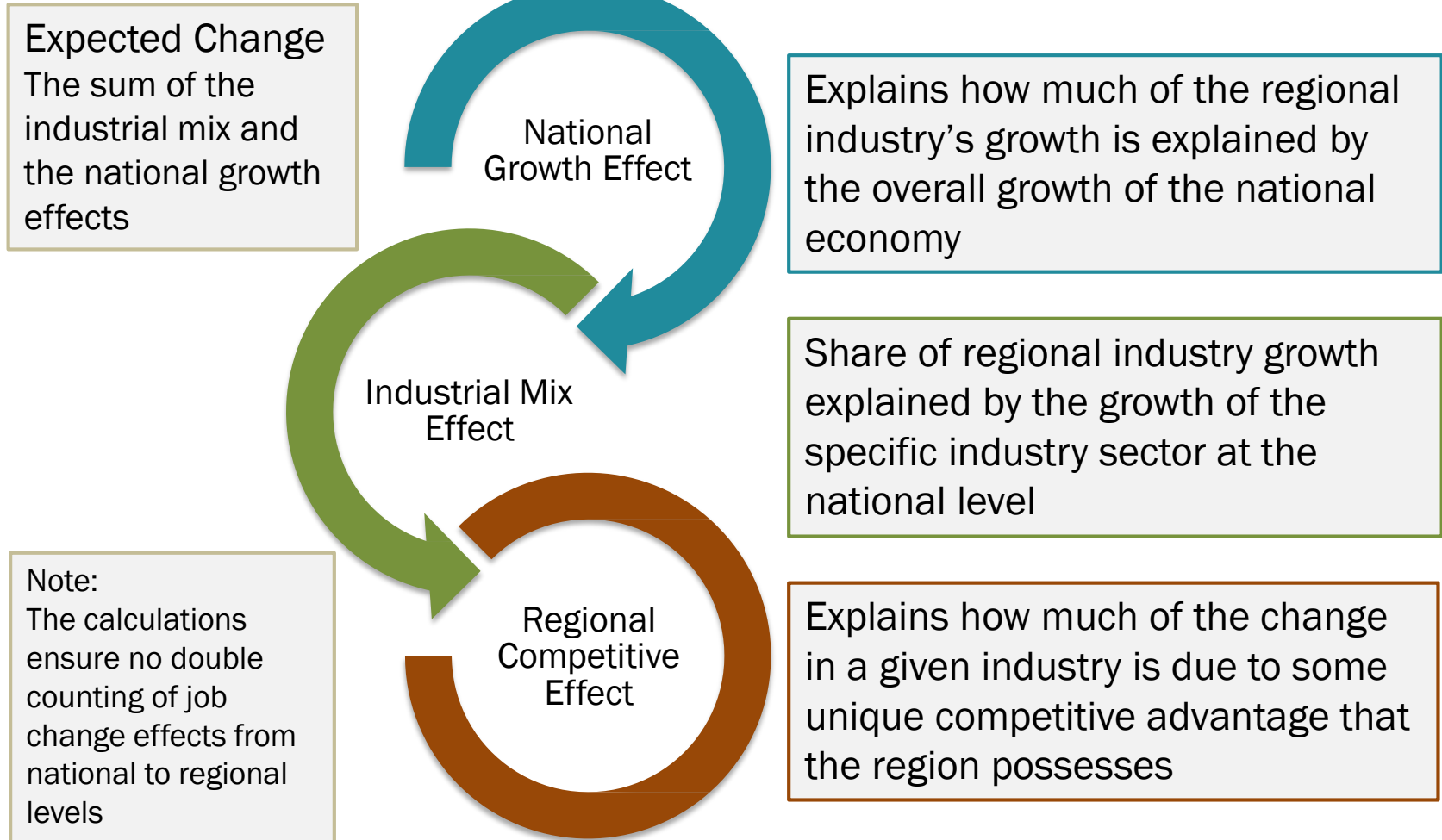
02

target
industry
clusters

Forest and Wood Product

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



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

Forest and Wood Product

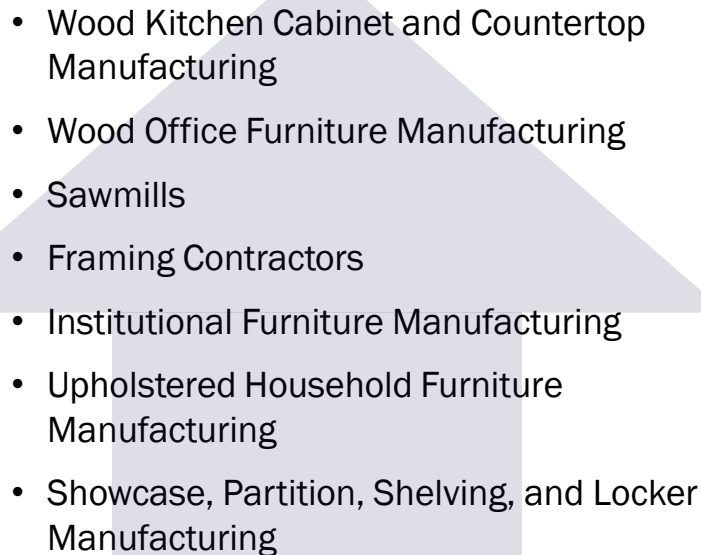
Industries	Jobs 2016	National Trend, 2010-2016	Industry Trend, 2010-2016	Cumulative Expected Growth	Actual Job Growth, 2010-2016	Regional Performance, 2010-2016
		A	B	C=A+B	D	D-C
Wood Kitchen Cabinet and Countertop Manufacturing	3,150	274	125	399	808	↑ 409
Wood Office Furniture Manufacturing	2,104	200	1	201	397	↑ 197
Upholstered Household Furniture Manufacturing	999	94	83	177	193	↑ 16
Nonupholstered Wood Household Furniture Manufacturing	485	68	-114	-46	-96	-49
Showcase, Partition, Shelving, and Locker Manufacturing	464	51	-35	16	29	↑ 13
Sawmills	281	22	-6	16	89	↑ 73
Institutional Furniture Manufacturing	273	24	-2	22	66	↑ 44
Furniture Merchant Wholesalers	249	42	68	110	-108	-218
Finish Carpentry Contractors	213	25	3	28	-4	-32
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	166	25	3	28	-51	-79
Logging	162	18	19	37	12	-24
Corrugated and Solid Fiber Box Manufacturing	154	28	-27	1	-84	-85
Framing Contractors	143	8	7	15	75	↑ 60
Wood Container and Pallet Manufacturing	123	13	3	16	14	-1
Truss Manufacturing	118	11	30	41	26	-15

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis

Forest and Wood Product

Industries that Outperformed

- 
- Wood Kitchen Cabinet and Countertop Manufacturing
 - Wood Office Furniture Manufacturing
 - Sawmills
 - Framing Contractors
 - Institutional Furniture Manufacturing
 - Upholstered Household Furniture Manufacturing
 - Showcase, Partition, Shelving, and Locker Manufacturing

Industries that Underperformed

- 
- Wood Container and Pallet Manufacturing
 - Truss Manufacturing
 - Logging
 - Finish Carpentry Contractors
 - Nonupholstered Wood Household Furniture Manufacturing
 - Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
 - Corrugated and Solid Fiber Box Manufacturing
 - Furniture Merchant Wholesalers

Top Industry Sectors

Forest and Wood Product

Industries	Exports 2016 (\$ Millions)	Jobs 2016	Export per job 2016 (\$)	LQ 2016
Wood Kitchen Cabinet and Countertop Manufacturing	435.00	3,150	138,080	39.50
Wood Office Furniture Manufacturing	456.95	2,104	217,189	188.29
Upholstered Household Furniture Manufacturing	209.67	999	209,833	26.31
Nonupholstered Wood Household Furniture Manufacturing	64.29	485	132,548	20.15
Showcase, Partition, Shelving, and Locker Manufacturing	43.74	464	94,335	16.65
Sawmills	28.51	281	101,424	5.31
Institutional Furniture Manufacturing	53.43	273	195,873	18.72
Furniture Merchant Wholesalers	54.68	249	219,603	6.97
Finish Carpentry Contractors	9.08	213	42,624	0.94
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	11.93	166	71,730	2.61
Logging	3.97	162	24,452	2.28
Corrugated and Solid Fiber Box Manufacturing	38.41	154	249,314	2.81
Framing Contractors	11.87	143	82,860	1.92
Wood Container and Pallet Manufacturing	13.15	123	106,712	3.08
Truss Manufacturing	23.59	118	200,394	6.86

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

Top 15 Inputs by Dollars

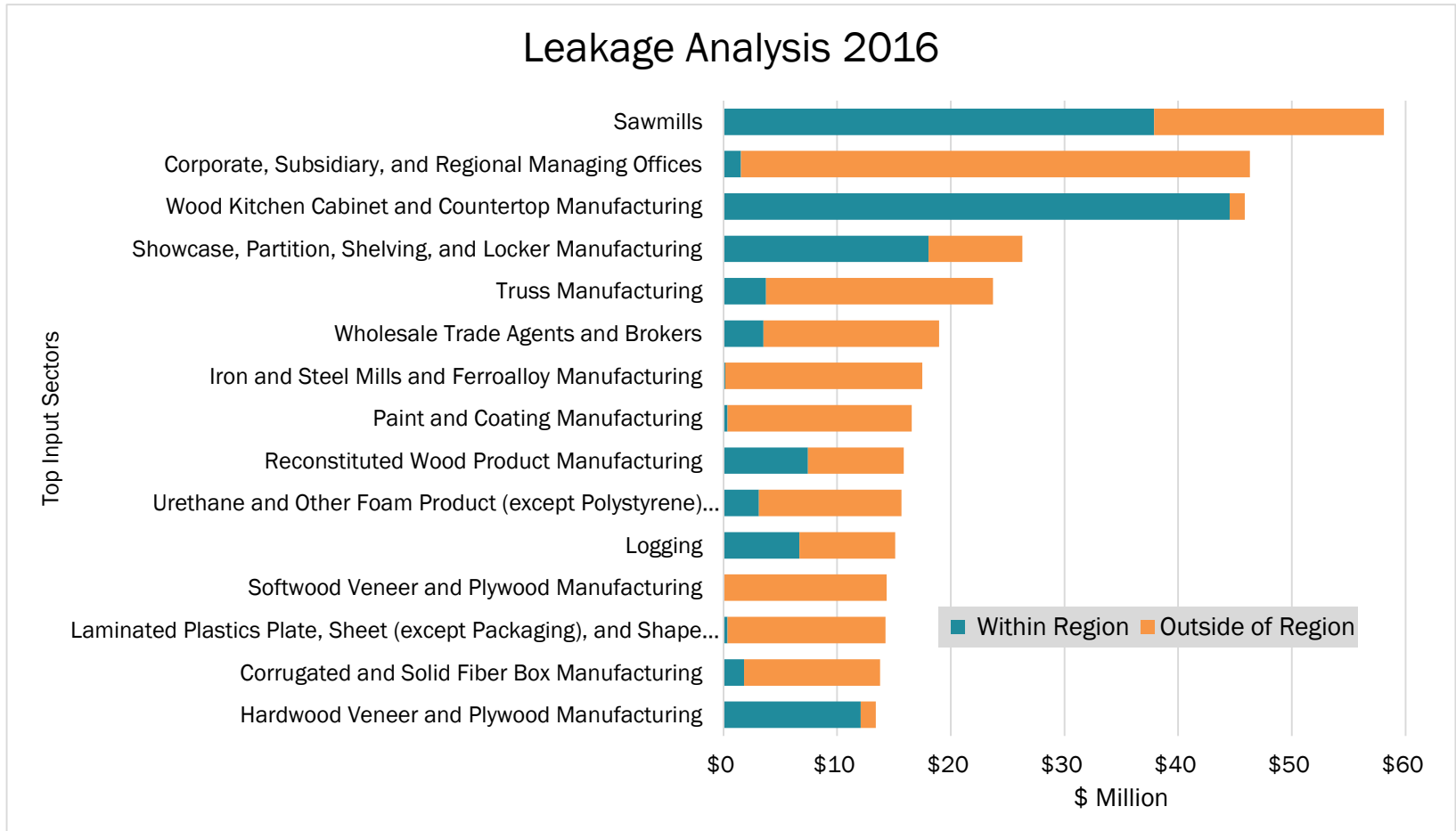
Forest and Wood Product

Industries	Estimated Input (\$ Millions), 2016	% In-Region	% Out of Region
Sawmills	\$58.10	65.2%	34.8%
Corporate, Subsidiary, and Regional Managing Offices	\$46.32	3.3%	96.7%
Wood Kitchen Cabinet and Countertop Manufacturing	\$45.86	97.1%	2.9%
Showcase, Partition, Shelving, and Locker Manufacturing	\$26.29	68.7%	31.3%
Truss Manufacturing	\$23.71	15.8%	84.2%
Wholesale Trade Agents and Brokers	\$18.98	18.5%	81.5%
Iron and Steel Mills and Ferroalloy Manufacturing	\$17.50	0.8%	99.2%
Paint and Coating Manufacturing	\$16.56	2.2%	97.8%
Reconstituted Wood Product Manufacturing	\$15.86	46.9%	53.1%
Urethane and Other Foam Product (except Polystyrene) Manufacturing	\$15.65	19.9%	80.1%
Logging	\$15.11	44.2%	55.8%
Softwood Veneer and Plywood Manufacturing**	\$14.35	0.0%	100.0%
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing	\$14.25	2.5%	97.5%
Corrugated and Solid Fiber Box Manufacturing	\$13.78	13.3%	86.7%
Hardwood Veneer and Plywood Manufacturing	\$13.39	90.2%	9.8%

** sector does not exist in the region.

Top 15 Inputs by Dollars

Forest and Wood Product



Top Occupations

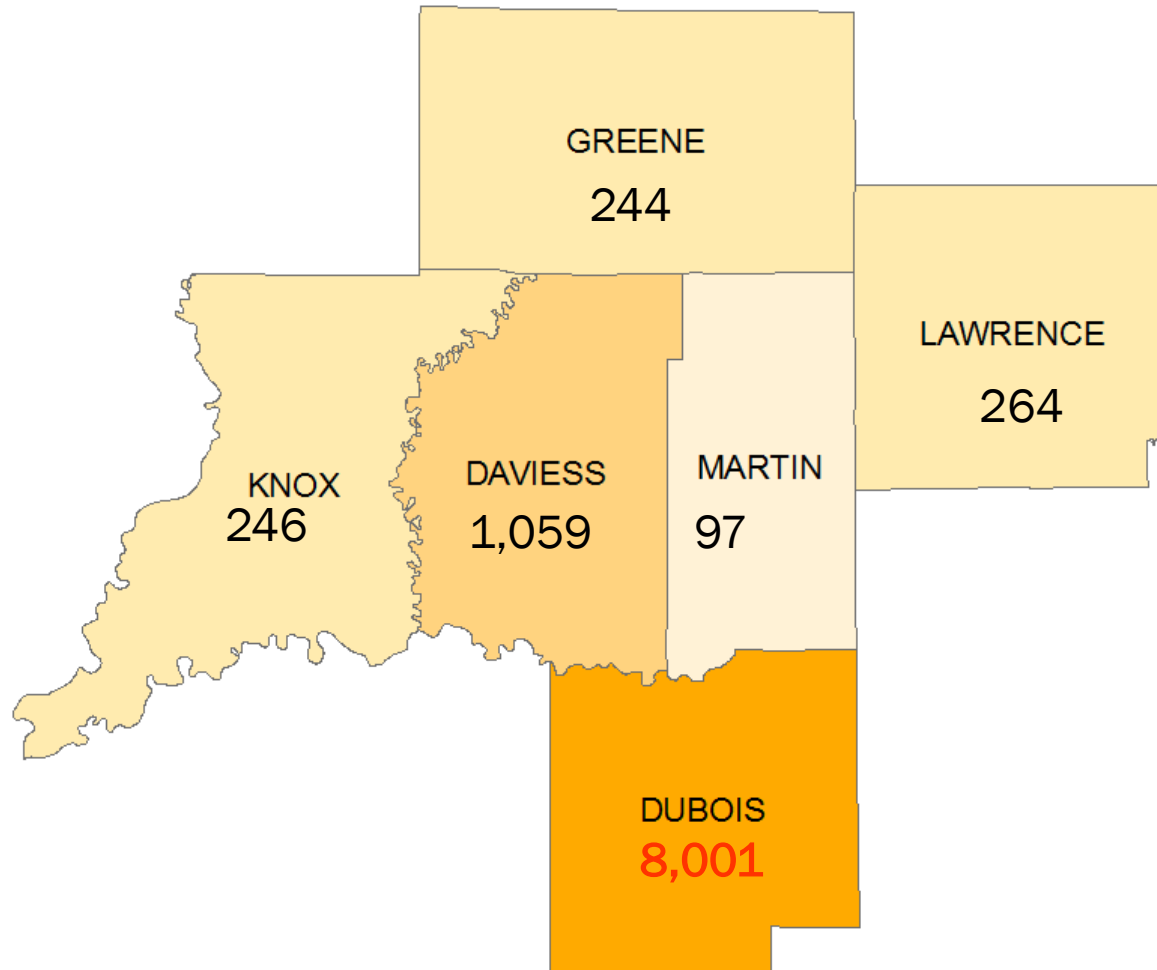
Forest and Wood Product

Occupations	Jobs 2016	% Change, 2010-2016	Median Hour Earnings	Entry Level Education
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	904	28%	\$13.50	High school diploma or equivalent
Team Assemblers	880	21%	\$16.56	High school diploma or equivalent
Cabinetmakers and Bench Carpenters	709	14%	\$14.24	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	592	24%	\$25.22	High school diploma or equivalent
Furniture Finishers	552	31%	\$13.90	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	477	14%	\$14.56	No formal educational credential
Carpenters	311	22%	\$14.76	High school diploma or equivalent
Helpers--Production Workers	245	20%	\$13.36	No formal educational credential
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	234	-2%	\$20.02	High school diploma or equivalent
Assemblers and Fabricators, All Other	224	20%	\$15.00	High school diploma or equivalent
Sawing Machine Setters, Operators, and Tenders, Wood	204	25%	\$13.36	High school diploma or equivalent
General and Operations Managers	184	14%	\$27.88	Bachelor's degree
Upholsterers	178	11%	\$15.45	High school diploma or equivalent
Office Clerks, General	163	13%	\$13.10	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	147	20%	\$14.86	High school diploma or equivalent

03 Cluster Comparisons

Forest and Wood Product

Forest and Wood Product: Contribution by Counties (Jobs 2016)



Section 03

Industry Clusters: Components to Assess

	Forest and Wood
Regional Performance, 2010-2016	281
Export value, 2016	\$1,542,421,264
Leakage, 2016	\$679,344,296
Establishments, 2016	207
Contribution by counties	6
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