



Regional Data Snapshot

Target Industry Clusters
SET Session 2

Bootheel Synergy, Missouri

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01 overview

Dunklin County, MO

Mississippi County, MO

New Madrid County, MO

Pemiscot County, MO

Scott County, MO

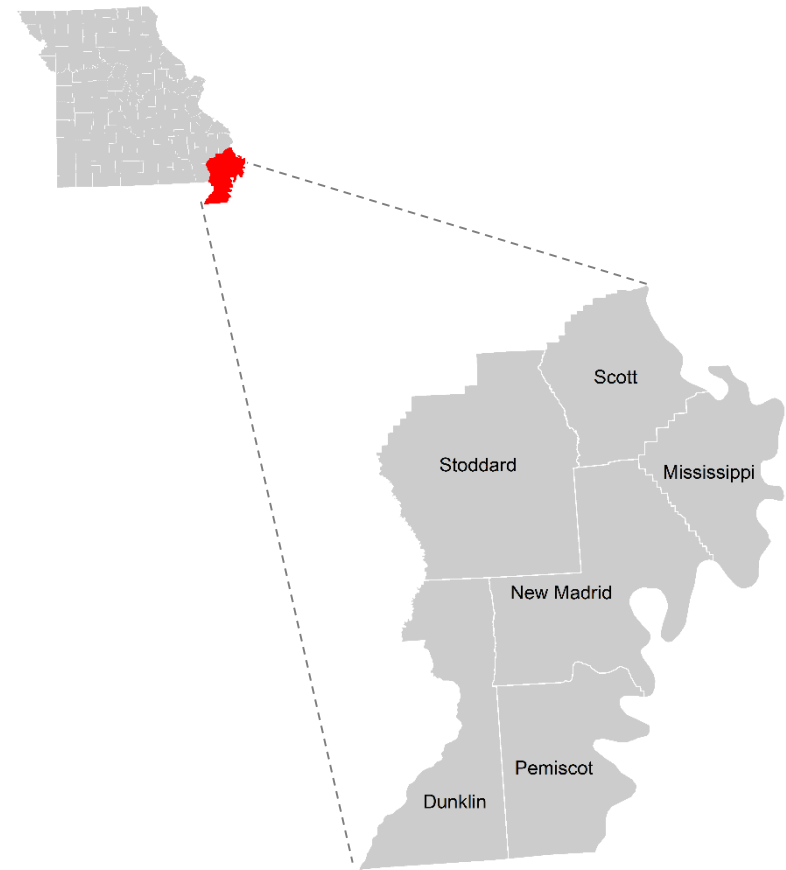
Stoddard County, MO

Overview

Bootheel Synergy, MO

The Bootheel Synergy Region is comprised of 6 Missouri counties. Interstate I-55 passes through the region and connects to St. Louis in the north and Memphis in the south. I-57 connects to I-55 through Mississippi County. Major railroads include BNSF and UP. Mississippi River waterway forms the eastern boundary of the region.

- Dunklin
- Mississippi
- New Madrid
- Pemiscot
- Scott
- Stoddard



02 target industry clusters

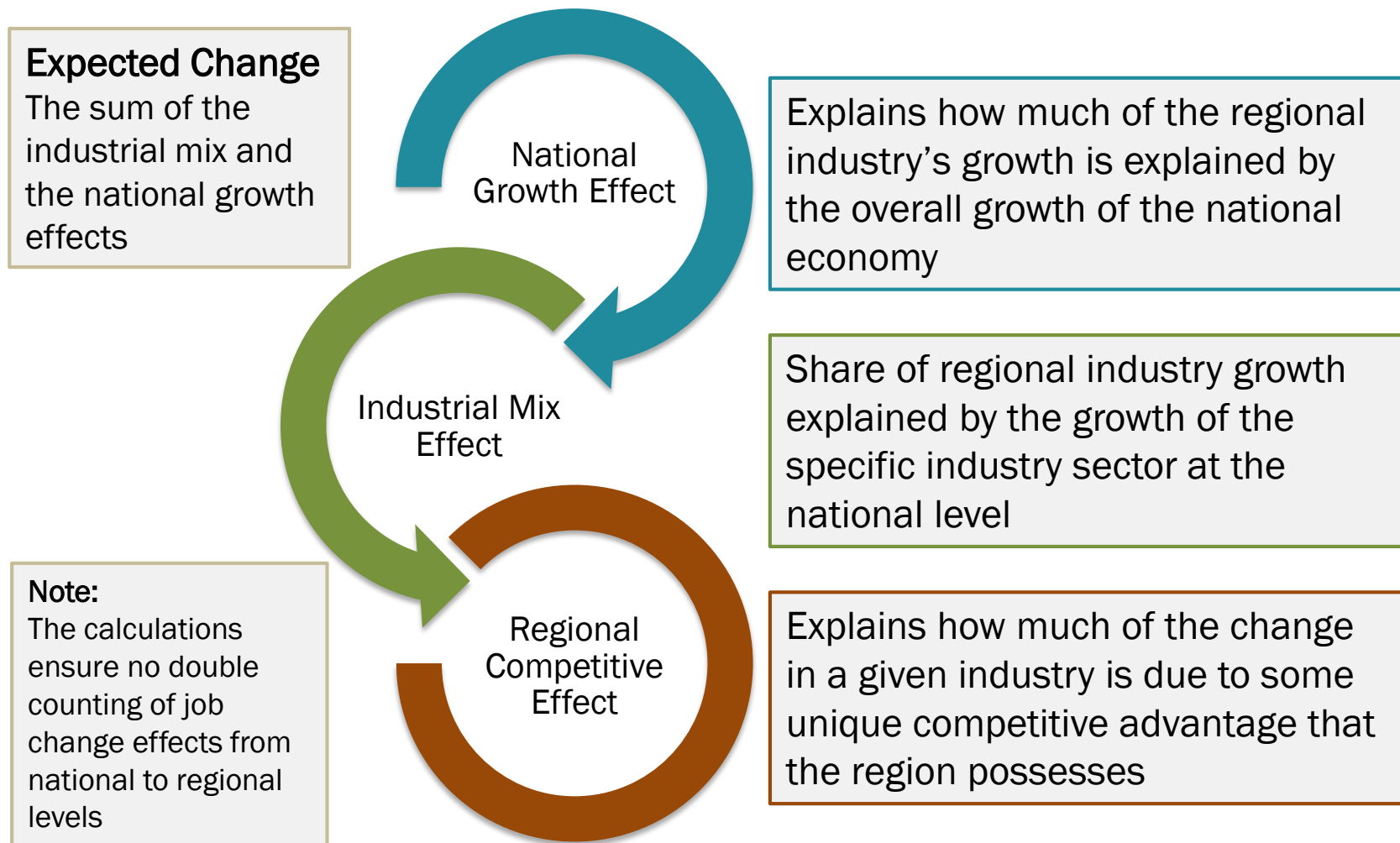
**Agribusiness, Food Processing
and Technology**

Transportation and Logistics

**Transportation Equipment
Manufacturing**

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	5,390	457	-386	71	387	↑ 316
Ice Cream and Frozen Dessert Manufacturing	878	73	-70	3	83	↑ 81
Poultry Processing	822	73	-84	-11	18	↑ 29
Farm Supplies Merchant Wholesalers	709	35	-2	33	327	↑ 294
Farm and Garden Machinery and Equipment Merchant Wholesalers	511	42	-12	30	55	↑ 25
Farm Labor Contractors and Crew Leaders	354	24	25	49	92	↑ 43
Cotton Ginning	322	33	-38	-5	-41	-35
Animal Production and Aquaculture	276	38	-46	-8	-141	-134
Soil Preparation, Planting, and Cultivating	265	16	19	35	87	↑ 52
Grain and Field Bean Merchant Wholesalers	222	15	6	21	57	↑ 37
Farm Management Services	131	7	10	17	51	↑ 34
Rice Milling	86	29	5	34	-227	-261
Other Animal Food Manufacturing	67	4	-1	3	29	↑ 26
Postharvest Crop Activities (except Cotton Ginning)	63	10	3	13	-43	-56
Soybean and Other Oilseed Processing	32	2	-11	-9	7	↑ 17
Farm Machinery and Equipment Manufacturing	32	4	2	6	-16	-22

Note: Upward arrow (↑) indicates regional competitiveness.

section 02

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Crop Production
- Farm Supplies Merchant Wholesalers
- Ice Cream and Frozen Dessert Manufacturing
- Soil Preparation, Planting, and Cultivating
- Farm Labor Contractors and Crew Leaders
- Grain and Field Bean Merchant Wholesalers
- Farm Management Services
- Poultry Processing
- Other Animal Food Manufacturing
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Soybean and Other Oilseed Processing

Industries that Underperformed

- Farm Machinery and Equipment Manufacturing
- Cotton Ginning
- Postharvest Crop Activities (except Cotton Ginning)
- Animal Production and Aquaculture
- Rice Milling

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Crop Production	\$515.76	5,390	\$95,690	9.15
Ice Cream and Frozen Dessert Manufacturing	\$360.16	878	\$410,387	103.42
Poultry Processing	\$215.89	822	\$262,490	9.19
Farm Supplies Merchant Wholesalers	\$101.53	709	\$143,252	14.76
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$77.32	511	\$151,198	11.93
Farm Labor Contractors and Crew Leaders	\$0.85	354	\$2,400	2.73
Cotton Ginning	\$15.63	322	\$48,460	83.44
Animal Production and Aquaculture	\$36.38	276	\$131,981	0.60
Soil Preparation, Planting, and Cultivating	\$2.49	265	\$9,385	8.60
Grain and Field Bean Merchant Wholesalers	\$28.77	222	\$129,543	10.15
Farm Management Services	\$6.09	131	\$46,612	10.00
Rice Milling	\$66.27	86	\$774,523	45.02
Other Animal Food Manufacturing	\$156.29	67	\$2,336,720	4.82
Postharvest Crop Activities (except Cotton Ginning)	\$0.07	63	\$1,072	1.60
Soybean and Other Oilseed Processing	\$26.38	32	\$817,459	9.60
Farm Machinery and Equipment Manufacturing	\$8.99	32	\$279,483	1.24

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

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Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Animal Production and Aquaculture	\$166.29	3.6%	96.4%
Crop Production	\$144.51	53.9%	46.1%
Corporate, Subsidiary, and Regional Managing Offices	\$46.00	0.6%	99.4%
Fluid Milk Manufacturing**	\$34.22	0.0%	100.0%
Poultry Processing	\$32.74	99.9%	0.1%
Petroleum Refineries	\$26.12	16.5%	83.5%
Wholesale Trade Agents and Brokers	\$23.36	15.5%	84.5%
Dry, Condensed, and Evaporated Dairy Product Manufacturing**	\$20.27	0.0%	100.0%
Farm Labor Contractors and Crew Leaders	\$19.08	61.0%	39.0%
Rail transportation	\$17.68	64.0%	36.0%
Commercial Banking	\$17.26	1.8%	98.2%
General Freight Trucking, Long-Distance, Truckload	\$14.64	93.5%	6.5%
Ice Cream and Frozen Dessert Manufacturing	\$13.96	97.3%	2.7%
Nitrogenous Fertilizer Manufacturing	\$13.71	31.9%	68.1%
Pesticide and Other Agricultural Chemical Manufacturing*	\$13.54	13.3%	86.7%

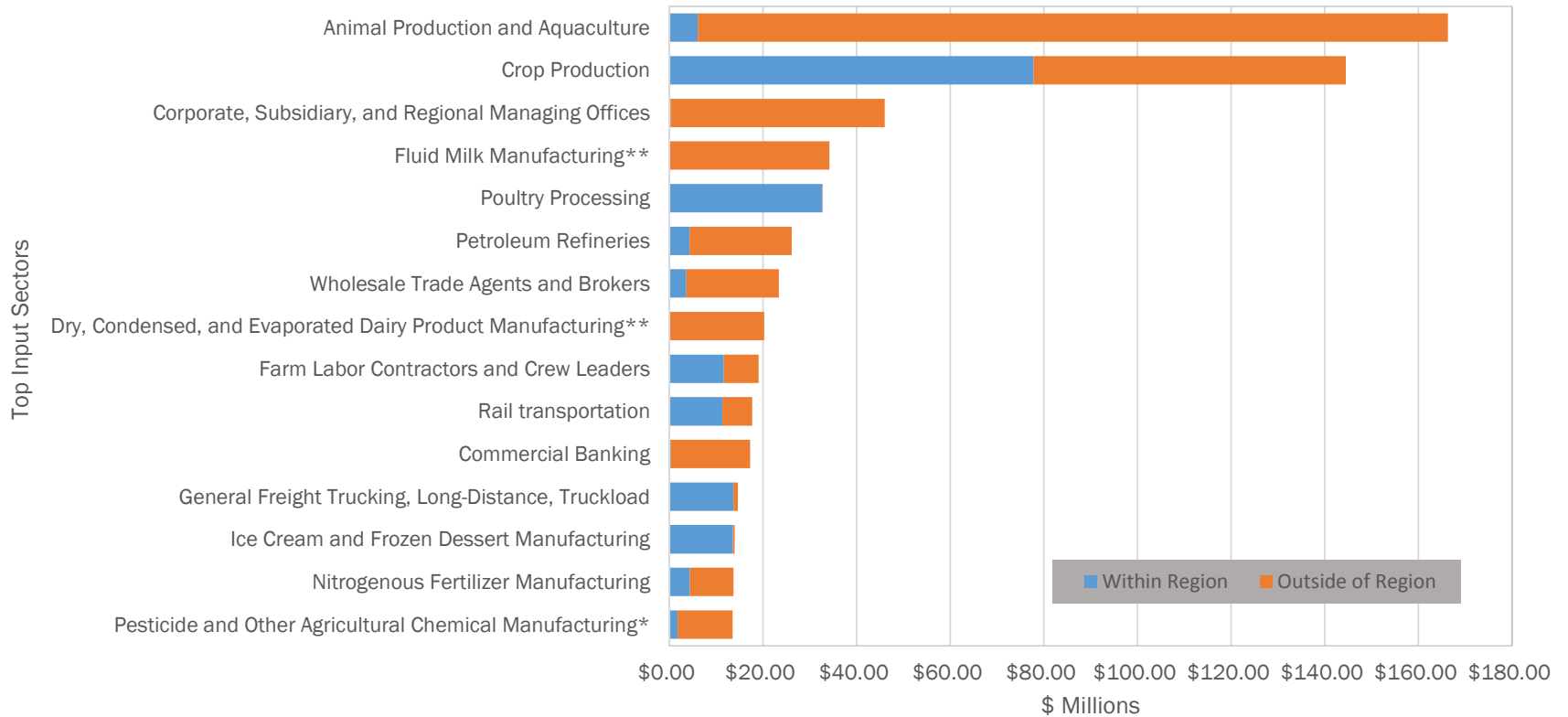
Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

Leakage Analysis, 2015



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

section 02

Source: EMSI Class of Worker 2017.3 (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	3,735	-3%	\$12.68	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	1,333	23%	\$11.35	No formal educational credential
Agricultural Equipment Operators	326	15%	\$12.24	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	264	18%	\$11.87	No formal educational credential
Helpers--Production Workers	206	-3%	\$10.09	No formal educational credential
Heavy and Tractor-Trailer Truck Drivers	201	26%	\$17.35	Postsecondary nondegree award
Food Batchmakers	199	-8%	\$15.87	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	173	23%	\$22.28	High school diploma or equivalent
Farm Equipment Mechanics and Service Technicians	171	10%	\$17.78	High school diploma or equivalent
Meat, Poultry, and Fish Cutters and Trimmers	160	3%	\$11.87	No formal educational credential
Farmworkers, Farm, Ranch, and Aquacultural Animals	154	26%	\$12.72	No formal educational credential
Nonfarm Animal Caretakers	149	66%	\$10.62	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	133	20%	\$13.00	High school diploma or equivalent
Maintenance and Repair Workers, General	124	-2%	\$15.20	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	112	8%	\$14.90	Some college, no degree
Animal Trainers	110	24%	\$9.72	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. 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

Transportation and Logistics

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 Freight Trucking, Long-Distance, Truckload	1,250	146	-50	96	-352	-448
General Warehousing and Storage	456	10	23	33	348	↑ 314
Couriers and Express Delivery Services	376	25	13	38	104	↑ 67
Rail transportation	209	17	4	21	25	↑ 3
Specialized Freight (except Used Goods) Trucking, Local	188	16	5	21	12	-10
Specialized Freight (except Used Goods) Trucking, Long-Distance	180	24	36	60	-88	-148
General Freight Trucking, Local	161	22	-7	15	-82	-97
General Freight Trucking, Long-Distance, Less Than Truckload	107	8	11	19	21	↑ 3
Other Support Activities for Water Transportation	63	3	-3	0	26	↑ 26
Navigational Services to Shipping	59	5	-4	1	8	↑ 7
Marine Cargo Handling*	57	0	1	1	Insf. Data	↑ 52
Farm Product Warehousing and Storage	53	7	4	11	-20	-32
Refrigerated Warehousing and Storage	51	5	4	9	-2	-11
Used Household and Office Goods Moving	35	2	1	3	11	↑ 8
Pipeline Transportation of Natural Gas	34	2	2	4	7	↑ 3

Note: Upward arrow (↑) indicates regional competitiveness. *: Employment in Marine Cargo Handling at 2009 was less than 10.

section 02

Shift-Share Analysis

Transportation and Logistics

Industries that Outperformed

- General Warehousing and Storage
- Couriers and Express Delivery Services
- Marine Cargo Handling
- Other Support Activities for Water Transportation
- Used Household and Office Goods Moving
- Navigational Services to Shipping
- Rail transportation
- Pipeline Transportation of Natural Gas
- General Freight Trucking, Long-Distance, Less Than Truckload

Industries that Underperformed

- Specialized Freight (except Used Goods) Trucking, Local
- Refrigerated Warehousing and Storage
- Farm Product Warehousing and Storage
- General Freight Trucking, Local
- Specialized Freight (except Used Goods) Trucking, Long-Distance
- General Freight Trucking, Long-Distance, Truckload

Note: Medical Laboratories; Diagnostic Imaging Centers; and Ambulance Services industries also outperformed in the region.

Top Industry Sectors

Transportation and Logistics

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
General Freight Trucking, Long-Distance, Truckload	\$110.50	1,250	\$88,410	3.73
General Warehousing and Storage	\$36.96	456	\$81,035	1.49
Couriers and Express Delivery Services	\$45.22	376	\$120,198	1.32
Rail transportation	\$38.13	209	\$182,705	2.15
Specialized Freight (except Used Goods) Trucking, Local	\$7.47	188	\$39,771	1.85
Specialized Freight (except Used Goods) Trucking, Long-Distance	\$16.21	180	\$89,912	3.10
General Freight Trucking, Local	\$8.52	161	\$53,005	0.89
General Freight Trucking, Long-Distance, Less Than Truckload	\$4.21	107	\$39,246	0.90
Other Support Activities for Water Transportation	\$7.58	63	\$120,645	13.85
Navigational Services to Shipping	\$9.51	59	\$160,059	6.97
Marine Cargo Handling	\$12.23	57	\$213,690	2.88
Farm Product Warehousing and Storage	\$4.47	53	\$84,901	8.84
Refrigerated Warehousing and Storage	\$3.55	51	\$70,317	2.08
Used Household and Office Goods Moving	\$1.85	35	\$52,859	0.83
Pipeline Transportation of Natural Gas	\$6.17	34	\$179,281	2.87
Freight Transportation Arrangement	\$1.43	32	\$45,312	0.29

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

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Top 15 Inputs by Dollars

Transportation and Logistics

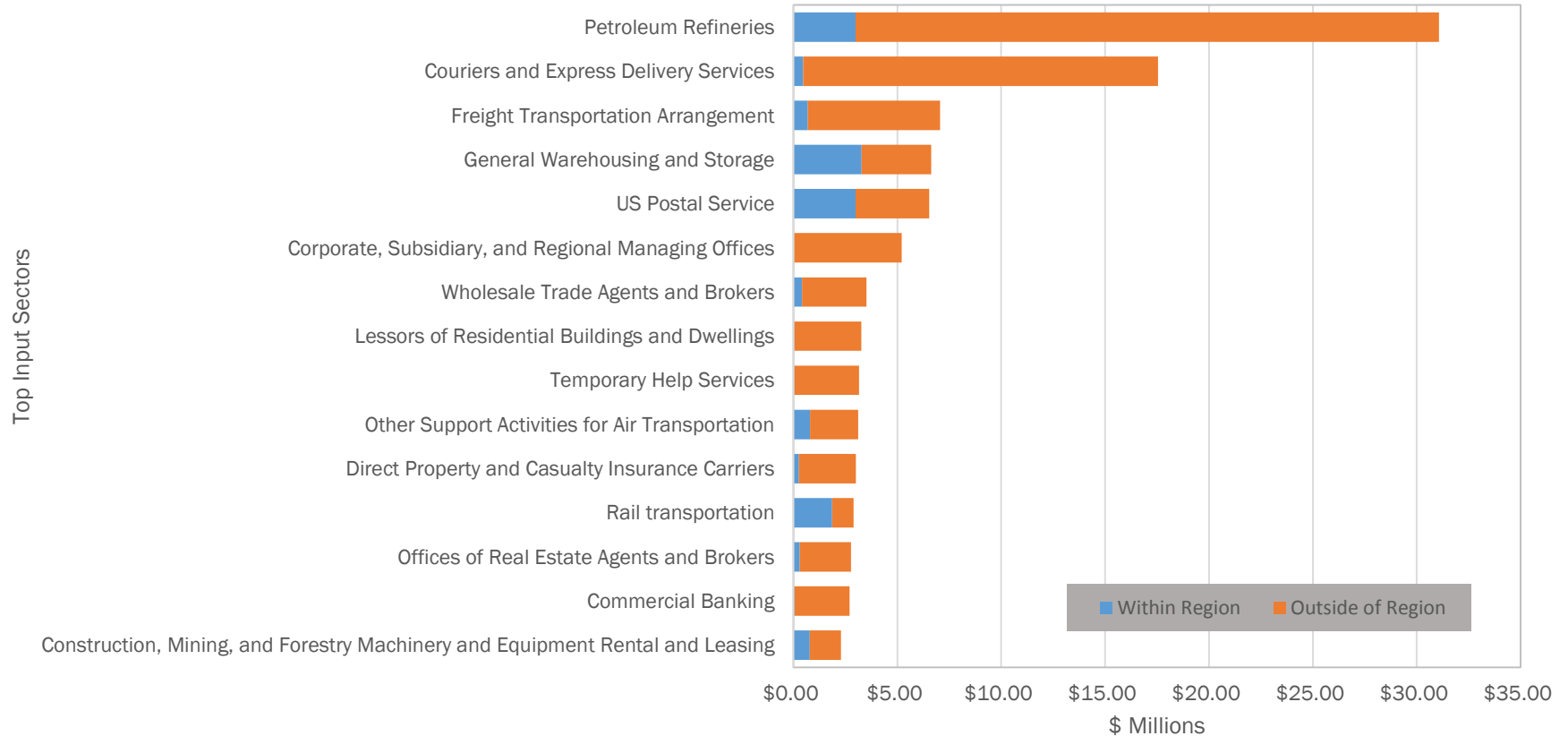
Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Petroleum Refineries	\$31.07	9.6%	90.4%
Couriers and Express Delivery Services	\$17.55	2.7%	97.3%
Freight Transportation Arrangement	\$7.06	9.7%	90.3%
General Warehousing and Storage	\$6.64	49.5%	50.5%
US Postal Service	\$6.54	45.8%	54.2%
Corporate, Subsidiary, and Regional Managing Offices	\$5.21	0.5%	99.5%
Wholesale Trade Agents and Brokers	\$3.51	12.0%	88.0%
Lessors of Residential Buildings and Dwellings	\$3.27	1.4%	98.6%
Temporary Help Services	\$3.16	1.4%	98.6%
Other Support Activities for Air Transportation	\$3.12	25.5%	74.5%
Direct Property and Casualty Insurance Carriers	\$3.01	8.9%	91.1%
Rail transportation	\$2.89	64.2%	35.8%
Offices of Real Estate Agents and Brokers	\$2.76	11.2%	88.8%
Commercial Banking	\$2.70	1.9%	98.1%
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$2.29	34.4%	65.6%

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Top 15 Inputs by Dollars

Transportation and Logistics

Leakage Analysis, 2015



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

section 02

Top Occupations

Transportation and Logistics

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	1,469	-17%	\$17.35	Postsecondary nondegree award
Laborers and Freight, Stock, and Material Movers, Hand	477	42%	\$11.87	No formal educational credential
Light Truck or Delivery Services Drivers	173	19%	\$14.17	High school diploma or equivalent
Industrial Truck and Tractor Operators	92	74%	\$14.03	No formal educational credential
Bus and Truck Mechanics and Diesel Engine Specialists	72	-10%	\$17.17	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	59	-2%	\$13.00	High school diploma or equivalent
Office Clerks, General	50	0%	\$11.48	High school diploma or equivalent
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	44	47%	\$21.84	High school diploma or equivalent
Machine Feeders and Offbearers	37	236%	\$13.23	No formal educational credential
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	44	2%	\$20.61	High school diploma or equivalent
Cargo and Freight Agents	41	-5%	\$14.94	High school diploma or equivalent
Managers, All Other	39	30%	\$17.97	Bachelor's degree
Maintenance and Repair Workers, General	38	73%	\$15.20	High school diploma or equivalent
Railroad Conductors and Yardmasters	37	12%	\$27.04	High school diploma or equivalent
Locomotive Engineers	37	12%	\$23.87	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

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

Transportation Equipment Manufacturing

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
Other Motor Vehicle Parts Manufacturing	791	58	156	214	152	-62
Ship Building and Repairing	471	46	-39	7	-31	-39
Truck Trailer Manufacturing	436	17	124	141	254	↑ 113
Railroad Rolling Stock Manufacturing	138	9	24	33	41	↑ 7
Travel Trailer and Camper Manufacturing	95	12	70	82	-35	-116
All Other Transportation Equipment Manufacturing*	45	1	1	2	Insf. Data	↑ 38
Boat Building*	<10	0	0	0	Insf. Data	-1


Note: Upward arrow (↑) indicates regional competitiveness. *: Industry sector of jobs 2009 was less than 10.

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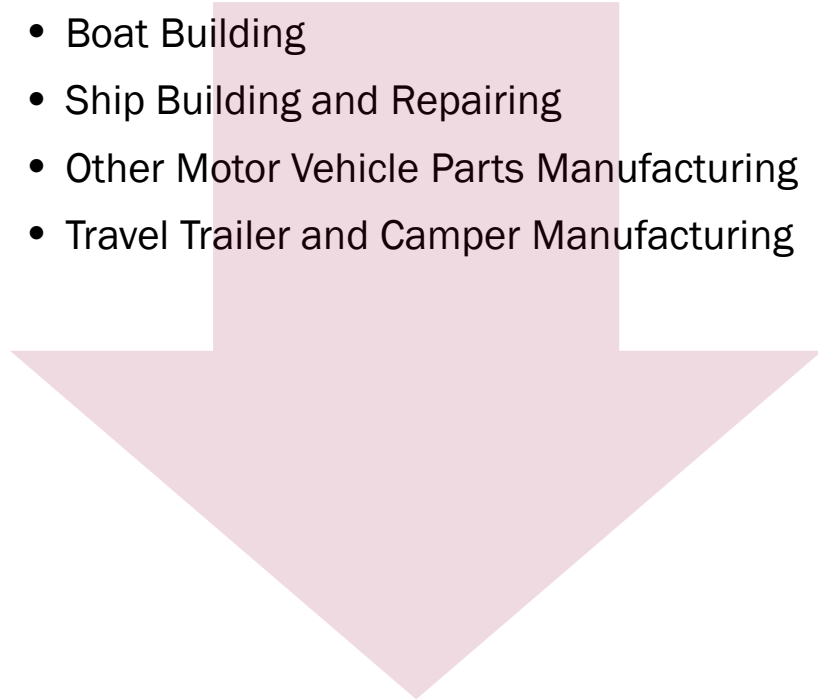
Shift-Share Analysis

Transportation Equipment Manufacturing

Industries that Outperformed

- 
- Truck Trailer Manufacturing
 - All Other Transportation Equipment Manufacturing
 - Railroad Rolling Stock Manufacturing

Industries that Underperformed

- 
- Boat Building
 - Ship Building and Repairing
 - Other Motor Vehicle Parts Manufacturing
 - Travel Trailer and Camper Manufacturing

Note: Electrical Contractors and Other Wiring Installation Contractors; and Other Heavy and Civil Engineering Construction industries also outperformed in the region.

section 02

Top Industry Sectors

Transportation Equipment Manufacturing

Industries	Exports 2015 (\$ Millions)	Jobs 2015	Export per job 2015 (\$)	LQ 2015
Other Motor Vehicle Parts Manufacturing	\$230.57	791	\$291,433	13.25
Ship Building and Repairing	\$102.84	471	\$218,523	11.38
Truck Trailer Manufacturing	\$124.91	436	\$286,699	28.54
Railroad Rolling Stock Manufacturing	\$41.85	138	\$304,076	11.34
Travel Trailer and Camper Manufacturing	\$18.44	95	\$193,286	6.26
All Other Transportation Equipment Manufacturing*	\$13.12	45	\$290,654	6.73
Boat Building*	\$0.08	<10	Insf. data	0.04

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

section 02

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Transportation Equipment Manufacturing

Industries	Estimated Input (\$ Millions), 2015	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$35.48	0.4%	99.6%
Other Motor Vehicle Parts Manufacturing	\$16.46	46.6%	53.4%
Motor Vehicle Metal Stamping**	\$15.05	0.0%	100.0%
Iron and Steel Mills and Ferroalloy Manufacturing*	\$13.79	1.0%	99.0%
Machine Shops	\$7.71	3.0%	97.0%
Railroad Rolling Stock Manufacturing	\$7.71	89.1%	10.9%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)*	\$7.65	1.2%	98.8%
Wholesale Trade Agents and Brokers	\$6.80	14.3%	85.7%
Other Aluminum Rolling, Drawing, and Extruding	\$5.76	5.4%	94.6%
All Other Plastics Product Manufacturing	\$5.44	6.9%	93.1%
Aluminum Sheet, Plate, and Foil Manufacturing**	\$4.68	0.0%	100.0%
Paint and Coating Manufacturing**	\$3.90	0.0%	100.0%
Plastics Material and Resin Manufacturing*	\$3.52	0.0%	100.0%
Other Engine Equipment Manufacturing*	\$3.49	0.0%	100.0%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing*	\$3.16	0.0%	100.0%

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

Transportation Equipment Manufacturing

Leakage Analysis, 2015



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

section 02

Top Occupations

Transportation Equipment Manufacturing

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Team Assemblers	378	41%	\$15.14	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	182	28%	\$16.31	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	79	23%	\$22.51	High school diploma or equivalent
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	66	12%	\$16.57	High school diploma or equivalent
Helpers--Production Workers	54	17%	\$10.09	No formal educational credential
Inspectors, Testers, Sorters, Samplers, and Weighers	53	29%	\$15.22	High school diploma or equivalent
Production Workers, All Other	51	28%	\$14.34	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	46	35%	\$11.87	No formal educational credential
Maintenance and Repair Workers, General	44	26%	\$15.20	High school diploma or equivalent
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	42	20%	\$14.62	High school diploma or equivalent
Fiberglass Laminators and Fabricators	41	-2%	\$11.88	High school diploma or equivalent
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	38	27%	\$15.50	High school diploma or equivalent
Assemblers and Fabricators, All Other	37	42%	\$13.46	High school diploma or equivalent
Computer-Controlled Machine Tool Operators, Metal and Plastic	36	38%	\$18.10	High school diploma or equivalent
Machinists	35	25%	\$15.49	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

03 cluster comparisons

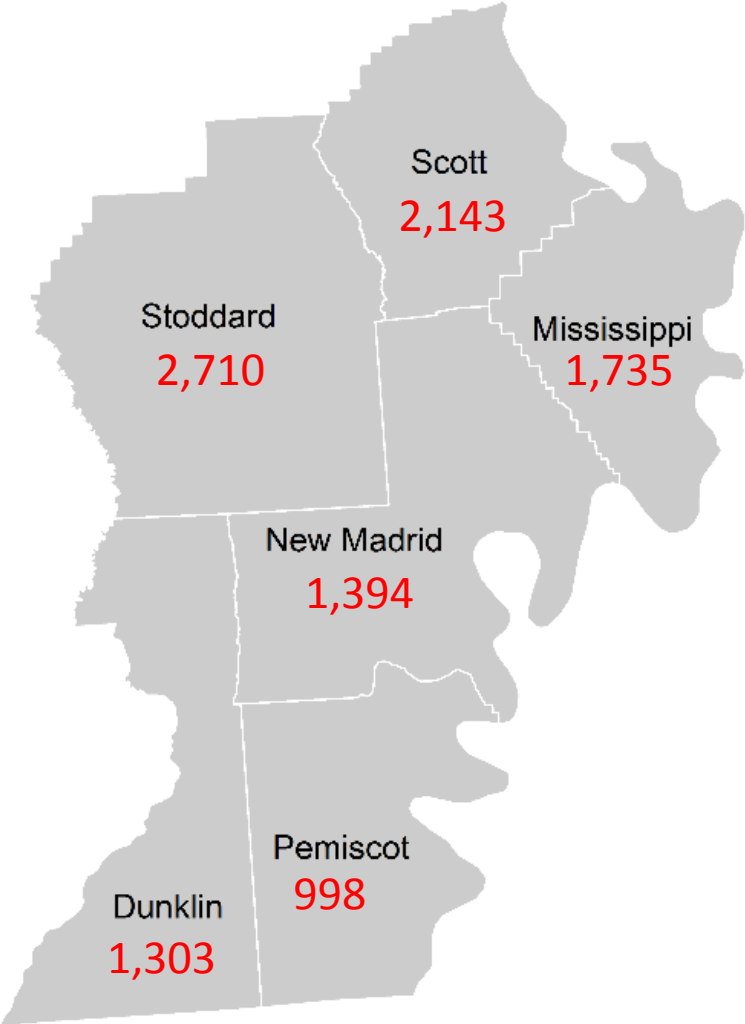
**Agribusiness, Food Processing
and Technology**

Transportation and Logistics

**Transportation Equipment
Manufacturing**

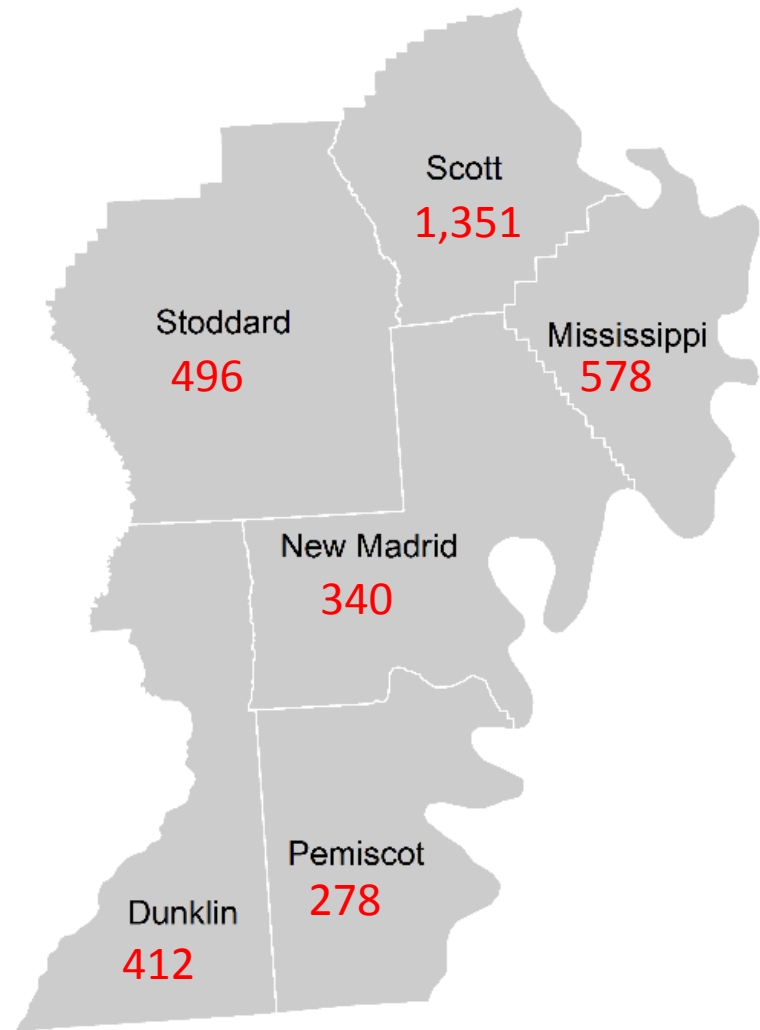
Agribusiness, Food Processing and Technology

Contribution by Counties (Jobs, 2015)



Transportation and Logistics

Contribution by Counties (Jobs, 2015)



Transportation Equipment Manufacturing

Contribution by Counties (Jobs, 2015)

