SET Phase V
Industry Clusters
SEMO Region, Missouri
Table of contents

01 Overview

02 Industry Cluster Analysis
01 overview

SEMO Region
The SEMO region is comprised of four Missouri counties. Ste. Genevieve County forms the border with Illinois.

- Iron
- Madison
- Ste. Genevieve
- St. Francois
02 industry cluster analysis

How to interpret cluster data result
Cluster bubble charts
How to interpret cluster data results

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

- **Mature**
  - **Top left** (strong but declining)
  - Contains clusters that are more concentrated in the region but are declining (negative growth). These clusters typically fall into the lower quadrant as job losses cause a decline in concentration.

- **Stars**
  - **Top right** (strong and advancing)
  - Contains clusters that are more concentrated in the region and are growing. These clusters are strengths that help a community stand out from the competition. Small, high-growth clusters can be expected to become more dominant over time.

- **Emerging**
  - **Bottom right** (weak but advancing)
  - Contains clusters that are under-represented in the region but are growing, often quickly. If growth trends continue, these clusters will eventually move into the top right quadrant. Clusters in this quadrant are considered emerging strengths for the region.

- **Transforming**
  - **Bottom left** (weak and declining)
  - Contains clusters that are under-represented in the region (low concentration) and are also losing jobs. Clusters in this region may indicate a gap in the workforce pipeline if local industries anticipate a future need. In general, clusters in this quadrant show a lack of competitiveness.
Industry cluster analysis

Cluster bubble chart, 2009-2014

% Change in LQ, 2009-2014

Mature
-35%  -25%  -15%  -5%  5%  15%  25%

Mfg Supercluster, 0.57, 905
Printing & Publishing, 0.47, 383
Advanced Materials, 0.81, 1,138
Defense & Security, 0.40, 801
Energy(Fossil & Renewable), 0.85, 2,154

Star
14  11
Mining, 12.29, 1,720

Forest & Wood Prod., 1.43, 961
Chemicals&Chemical Based, 2.26, 1,293
Glass & Ceramics, 7.44, 600

Transforming

Arts & Ent., 0.49, 944
Edu. & Knowledge, 0.25, 271

-1

Emerging

IT & Telecomm., 0.18, 343
Business&FinancialService, 0.47, 2,980
Transportation & Logistics, 1.07, 1,586

% Change in LQ, 2009-2014
* Note: Label includes cluster name, LQ 2014, and Employment 2014

Source: EMSI 2014.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
Industry cluster analysis

Manufacturing sub-cluster, 2009-2014

* Note: Label includes cluster name, LQ 2014, and Employment 2014;

Source: ESI 2014.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
### Industry cluster analysis, 2009-2014

#### Mature Clusters
- **Mining** (12.3; 1,720)
- **Glass & Ceramics** (7.4; 600)
- **Chemicals/Chemical-based Products** (2.3; 1,293)
- **Forest & Wood Products** (1.4; 961)
- **Fabricated Metal Product Mfg.** (1.2; 456)
- **Machinery Manufacturing** (1.1; 350)

#### Star Clusters
- **Agribusiness, Food Processing & Tech** (1.7; 2,413)
- **Biomed/Biotechnical (Life Science)** (1.1; 4,198)
- **Transportation & Logistics** (1.1; 1,586)

#### Transforming Clusters
- **Energy (Fossil & Renewable)** (0.9; 2,154)
- **Advanced Materials** (0.8; 1,138)
- **Mfg. Supercluster** (0.6; 905)
- **Apparel & Textiles** (0.6; 196)
- **Arts, Entertainment., Recreation. & Visitor Industries** (0.5; 944)
- **Printing & Publishing** (0.5; 383)
- **Defense & Security** (0.4; 801)
- **Education & Knowledge Creation** (0.3; 271)

#### Emerging Clusters
- **Business & Financial Services** (0.5; 2,980)
- **Information Technology & Telecom.** (0.2; 343)
- **Transportation Equipment Mfg.** (0.2; 78)

---

**NOTE:** The first number (fractions and real numbers) 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. The clusters are sorted in decreasing order by location quotient.

*Note: Computer & Electronic Product does not exist; Electrical Equipment & Appliances and Primary Metal Mfg. have too less number of jobs.*
Industry cluster analysis

Bubble chart interpretation

Mature Industries

Six industry clusters in the SEMO Region are in the Maturing stage: Mining, Glass & Ceramics, Chemicals/Chemical-based Products, Forest & Wood Products, Fabricated Metal Product Mfg. and Machinery Manufacturing. These industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the SEMO 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 SEMO Region nine clusters are in this group with Energy, Advanced Materials, Manufacturing Supercluster, and Arts, Entertainment, Recreation & Visitor Industries being the largest by employment. However, 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 SEMO Region are Agribusiness, Food Processing & Technology, Biomedical/Biotechnical (Life Science), and Transportation & Logistics clusters.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are three clusters in the region: Business & Financial Services, Transportation Equipment Manufacturing, and Information Technology & Telecommunications.

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