

# WORKFORCE INVESTMENT BOARD OF TULARE COUNTY

## Manufacturing Industry Report 2010

### Summary

The manufacturing sector in Tulare County represents the production of all durable and non-durable goods made in the county. “Durable goods” refer to products that have an extended life, such as appliances, hardware, and computers. “Non-durable goods” refer to foods products and other products that have a shorter utility, such as disposable cups. The Food Processing sub-sector has contributed significant job growth in the county in the last few years.

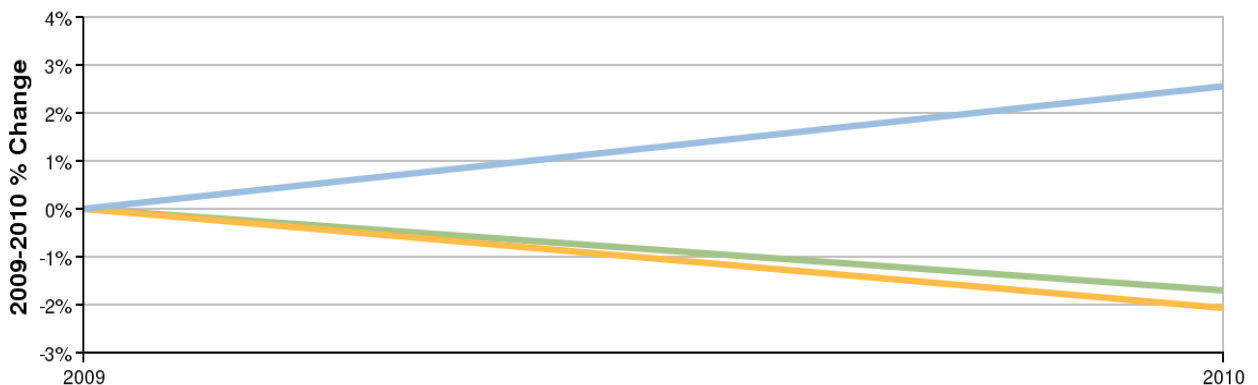
Basic Information	
2009 Industry Jobs	11,425
2010 Industry Jobs	11,717
Total Change	292
Total % Change	2.58%
Current Average Earnings per Worker	\$53,275

Economic Indicators	
2009 Location Quotient	0.86
2010 Location Quotient	0.90
Shift Share: Regional Competitiveness Effect	399
Shift Share: Industrial Mix Effect	-389
Shift Share: National Effect	281

Source: EMSI Complete Employment - 1st Quarter 2010

### Industry Change Summary

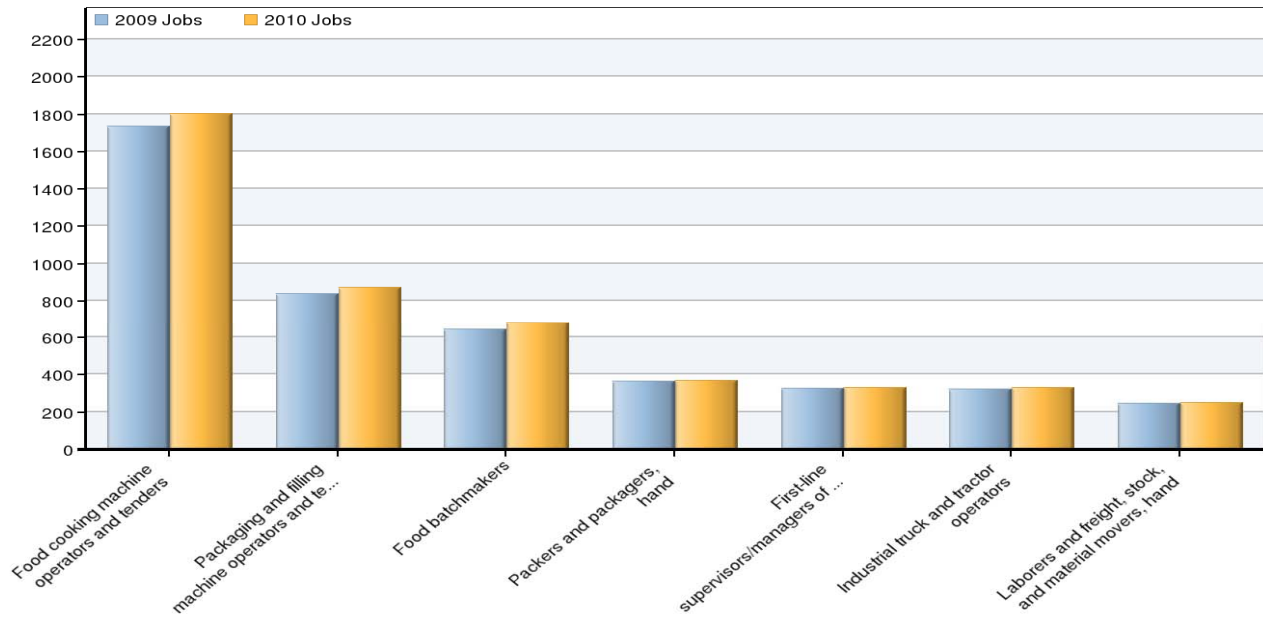
■ Regional Growth Rate
 ■ State Growth Rate
 ■ National Growth Rate



Description	2009 Jobs	2010 Jobs	Change	% Change	Current EPW	2008 Firms
Regional Total	11,425	11,717	292	3%	\$53,275	299
State Total	1,394,041	1,365,190	-28,851	-2%	\$82,513	48,192
National Total	12,557,495	12,343,643	-213,852	-2%	\$68,478	367,098

Source: EMSI Complete Employment - 1st Quarter 2010

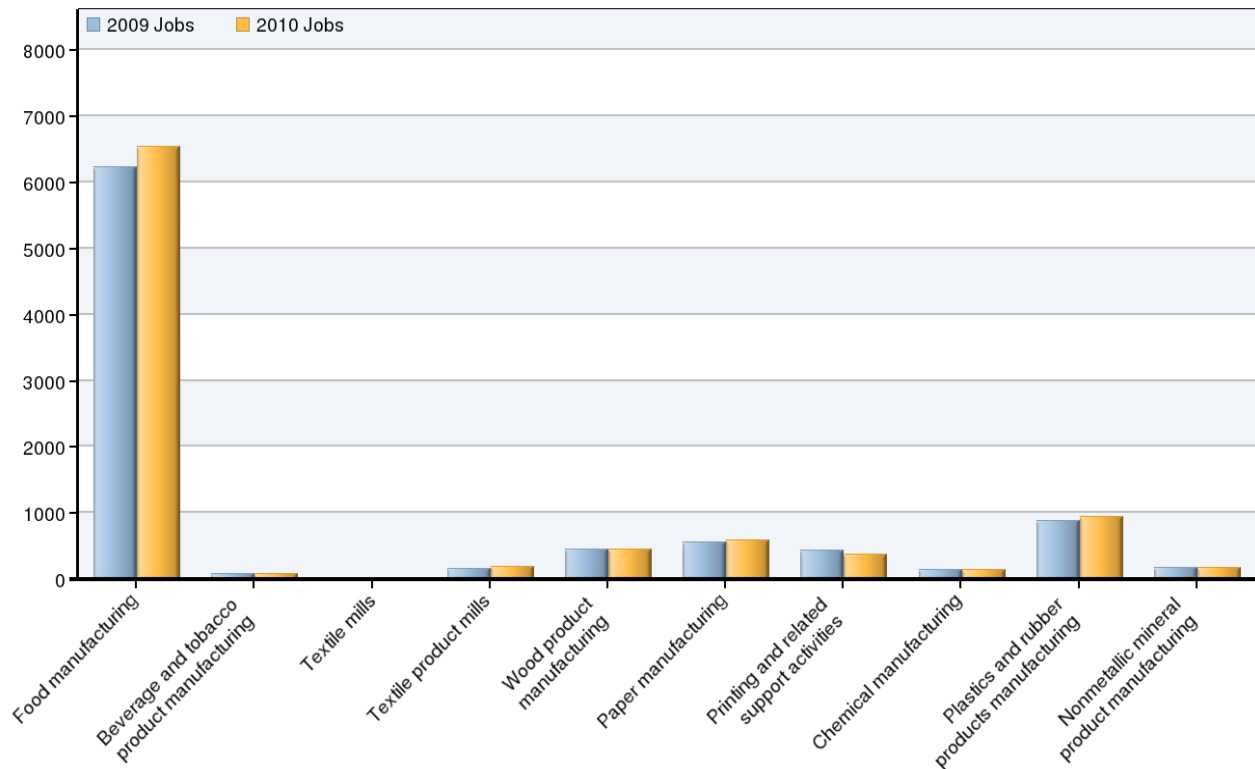
## Top Occupations In Selected Industries



SOC Code	Name	2009 Jobs	2010 Jobs	Change	% Change
51-3093	Food cooking machine operators and tenders	1,736	1,804	68	4%
51-9111	Packaging and filling machine operators and tenders	836	870	34	4%
51-3092	Food batchmakers	643	680	37	6%
53-7064	Packers and packagers, hand	362	370	8	2%
51-1011	First-line supervisors/managers of production and operating workers	324	328	4	1%
53-7051	Industrial truck and tractor operators	323	332	9	3%
53-7062	Laborers and freight, stock, and material movers, hand	244	249	5	2%

Source: EMSI Complete Employment - 1st Quarter 2010

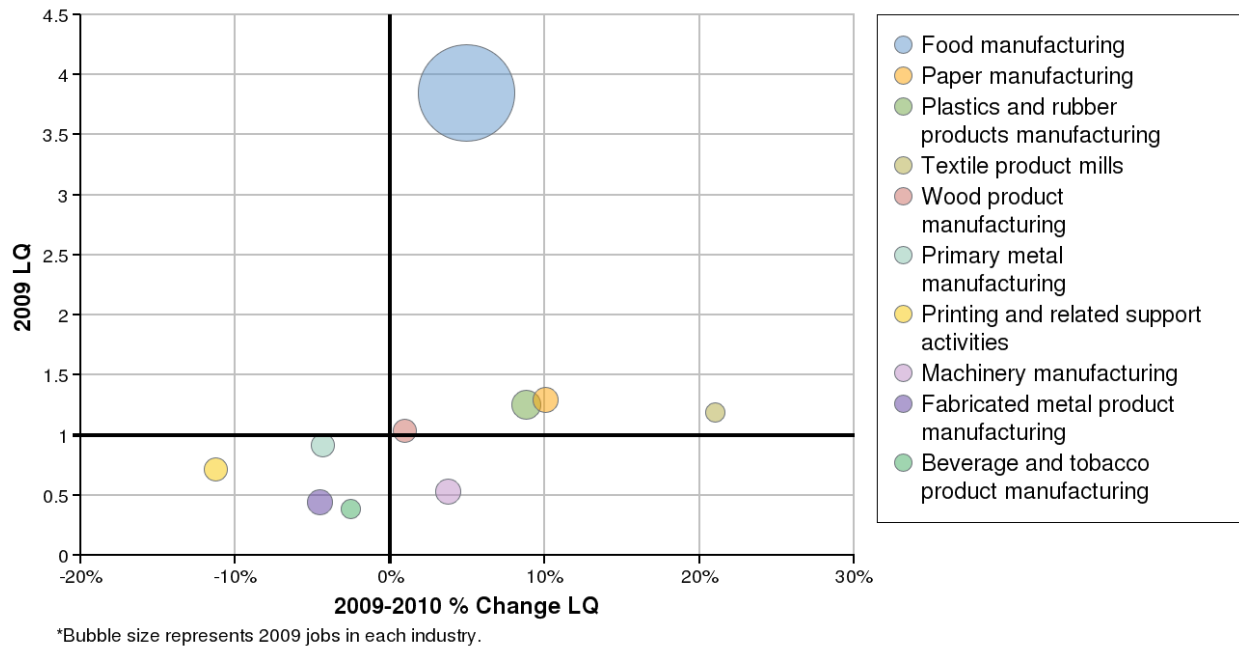
## Industry Breakdown



NAICS Code	Description	2009 Jobs	2010 Jobs	Current EPW	2008 Establishments
311	Food manufacturing	6,232	6,534	\$55,141	84
312	Beverage and tobacco product manufacturing	83	81	\$47,668	6
313	Textile mills	19	22	\$16,587	1
314	Textile product mills	160	180	\$37,206	5
321	Wood product manufacturing	451	448	\$36,657	16
322	Paper manufacturing	560	584	\$55,728	11
323	Printing and related support activities	436	372	\$51,113	16
325	Chemical manufacturing	138	144	\$75,585	13
326	Plastics and rubber products manufacturing	875	934	\$53,427	16
327	Nonmetallic mineral product manufacturing	163	164	\$55,497	14
331	Primary metal manufacturing	368	340	\$51,113	8
332	Fabricated metal product manufacturing	644	601	\$50,570	41
333	Machinery manufacturing	602	609	\$58,202	31
334	Computer and electronic product manufacturing	436	428	\$50,476	5
336	Transportation equipment manufacturing	54	56	\$47,172	7
337	Furniture and related product manufacturing	74	79	\$46,550	10
339	Miscellaneous manufacturing	115	130	\$29,028	11
	<b>Total</b>	<b>11,411</b>	<b>11,703</b>	<b>\$53,274</b>	<b>297</b>

Source: EMSI Complete Employment - 1st Quarter 2010

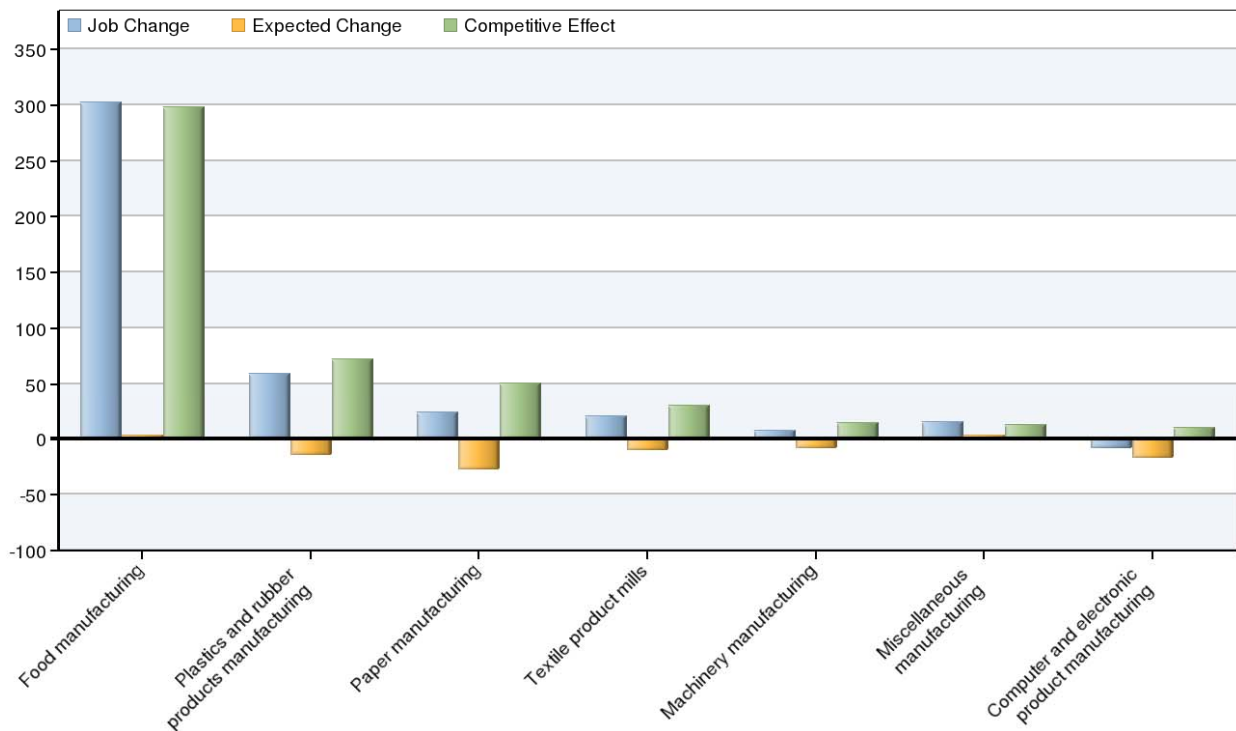
## Location Quotient Breakdown



NAICS Code	Description	2009 Jobs	2009 LQ	2010 LQ
311	Food manufacturing	6,232	3.85	4.04
322	Paper manufacturing	560	1.29	1.42
326	Plastics and rubber products manufacturing	875	1.25	1.36
314	Textile product mills	160	1.19	1.44
321	Wood product manufacturing	451	1.03	1.04
331	Primary metal manufacturing	368	0.92	0.88
323	Printing and related support activities	436	0.71	0.63
333	Machinery manufacturing	602	0.53	0.55
332	Fabricated metal product manufacturing	644	0.44	0.42
312	Beverage and tobacco product manufacturing	83	0.39	0.38
327	Nonmetallic mineral product manufacturing	163	0.36	0.37
334	Computer and electronic product manufacturing	436	0.35	0.36
337	Furniture and related product manufacturing	74	0.17	0.18
325	Chemical manufacturing	138	0.16	0.17
339	Miscellaneous manufacturing	115	0.15	0.17
313	Textile mills	19	0.14	0.18
336	Transportation equipment manufacturing	54	0.04	0.04
	<b>Total</b>	<b>11,411</b>	<b>0.91</b>	<b>0.95</b>

Source: EMSI Complete Employment - 1st Quarter 2010

## Shift Share Breakdown



NAICS Code	Description	Job Change	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect
311	Food manufacturing	302	-150	153	3	298
326	Plastics and rubber products manufacturing	59	-36	22	-14	72
322	Paper manufacturing	24	-41	14	-27	51
314	Textile product mills	20	-14	4	-10	30
333	Machinery manufacturing	7	-23	15	-8	14
339	Miscellaneous manufacturing	15	0	3	3	12
334	Computer and electronic product manufacturing	-8	-28	11	-17	10
325	Chemical manufacturing	6	-5	3	-2	7
313	Textile mills	3	-3	0	-3	5
337	Furniture and related product manufacturing	5	-2	2	0	5
336	Transportation equipment manufacturing	2	-2	1	-1	2
321	Wood product manufacturing	-3	-16	11	-5	2
324	Petroleum and coal products manufacturing	0	0	0	0	1
327	Nonmetallic mineral product manufacturing	1	-3	4	1	0
315	Apparel manufacturing	0	0	0	0	0
335	Electrical equipment and appliance mfg.	0	0	0	0	0
316	Leather and allied product manufacturing	-1	-1	0	-1	0
312	Beverage and tobacco product manufacturing	-2	-2	2	0	-2
331	Primary metal manufacturing	-28	-19	9	-10	-18
332	Fabricated metal product manufacturing	-43	-21	16	-5	-38
323	Printing and related support activities	-64	-23	11	-12	-51
	Total	295	-389	281	-108	399

Source: EMSI Complete Employment - 1st Quarter 2010

## **Data Sources and Calculations**

### **Industry Data**

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

### **Occupation Data**

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

### **Location Quotient**

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

### **Shift Share**

Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors.

### **State Data Sources**

This report uses state data from the following agencies: California Labor Market Information Department.