

City of Mesquite

Industry Cluster Analysis



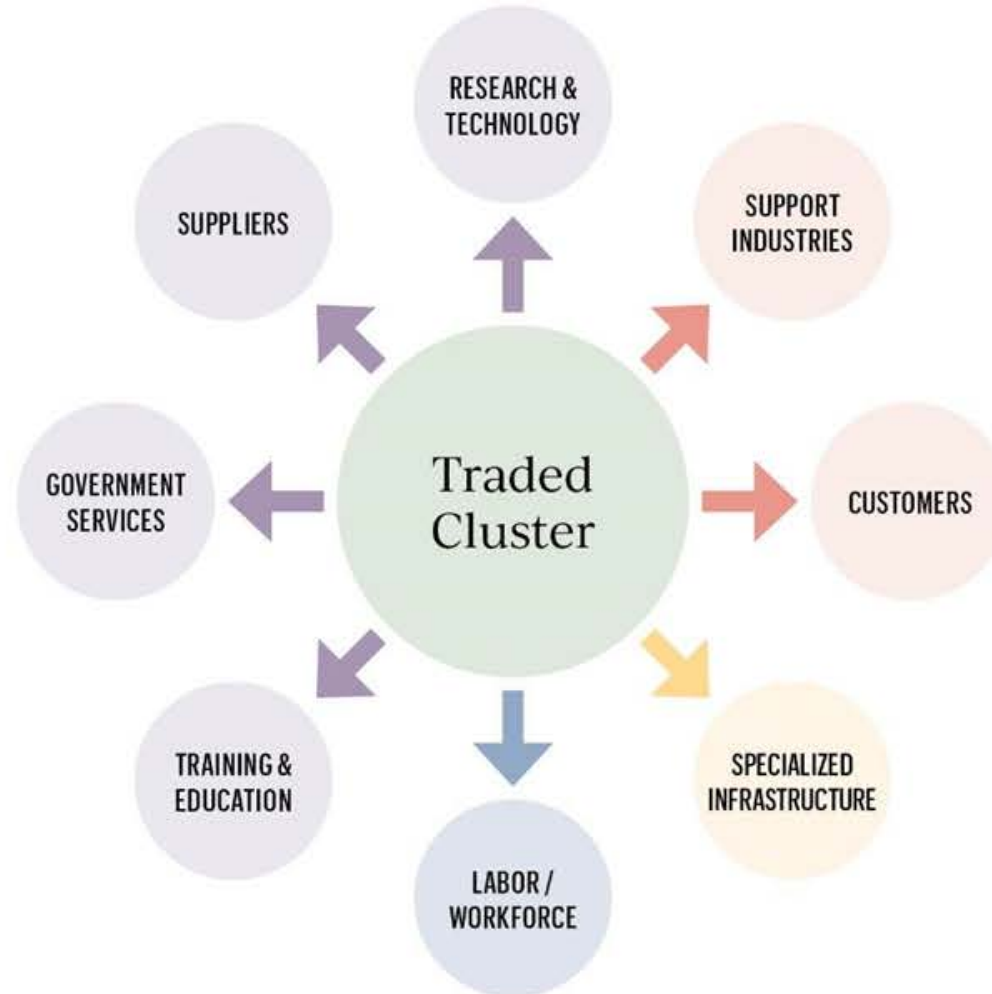
Agenda

- Cluster Framework
- Industry Cluster Assessment:
 - Competitiveness
 - Equity
 - Resilience
- Cluster Overview
- Industry Cluster Profiles
- Questions and Discussion

01

Cluster Framework

A cluster is a concentration of related industries in a particular location.



Traded vs. Local Clusters

TRADED CLUSTERS

Groups of related industries that serve markets beyond the region in which they are located.

Flexible in choice of location of operation (unless linked to natural resources).

Concentrated in regions with specific competitive advantages.

Higher wages and levels of innovation

Examples: Financial Services in New York, IT in Silicon Valley, and Video Production and Distribution in LA.

LOCAL CLUSTERS

Industries that serve the local market.

Available in every market because they serve the local population; employment is proportional to the size of the population they serve.

Prevalent in all markets regardless of competitive advantages

Higher levels of employment

Examples: local entertainment, local health services, local commercial services.

Mesquite Industry Clusters

We are examining 7 industry clusters for Mesquite:

Food Processing and
Manufacturing

Furniture

Distribution and Electronic
Commerce

Media

Downstream Chemical
Products

Retail

Production Technology and
Heavy Machinery

Why?

Legacy Cluster

Part of Past Economic Development Efforts

Emerging

A Framework For Cluster Strategy



We are examining Mesquite's industry clusters through 3 different lenses:

Competitiveness

Competitive Advantage
(Location Quotient)

Concentrated Advantage
(Share of cluster employees in
industries with LQ>1.25)

Total employment

5-year job growth

Total GRP

Productivity
(GRP per worker)

Equity

Share of female employees

Share of employees, by ethnicity

Share of employees with less than
a Bachelor's degree

Share of jobs at risk of
automation

Earnings per worker

Resilience

Firm distribution, by number of
employees

Number of industries in cluster

Share of female employees

Share of Employees of Color

Share of employees, by
educational attainment

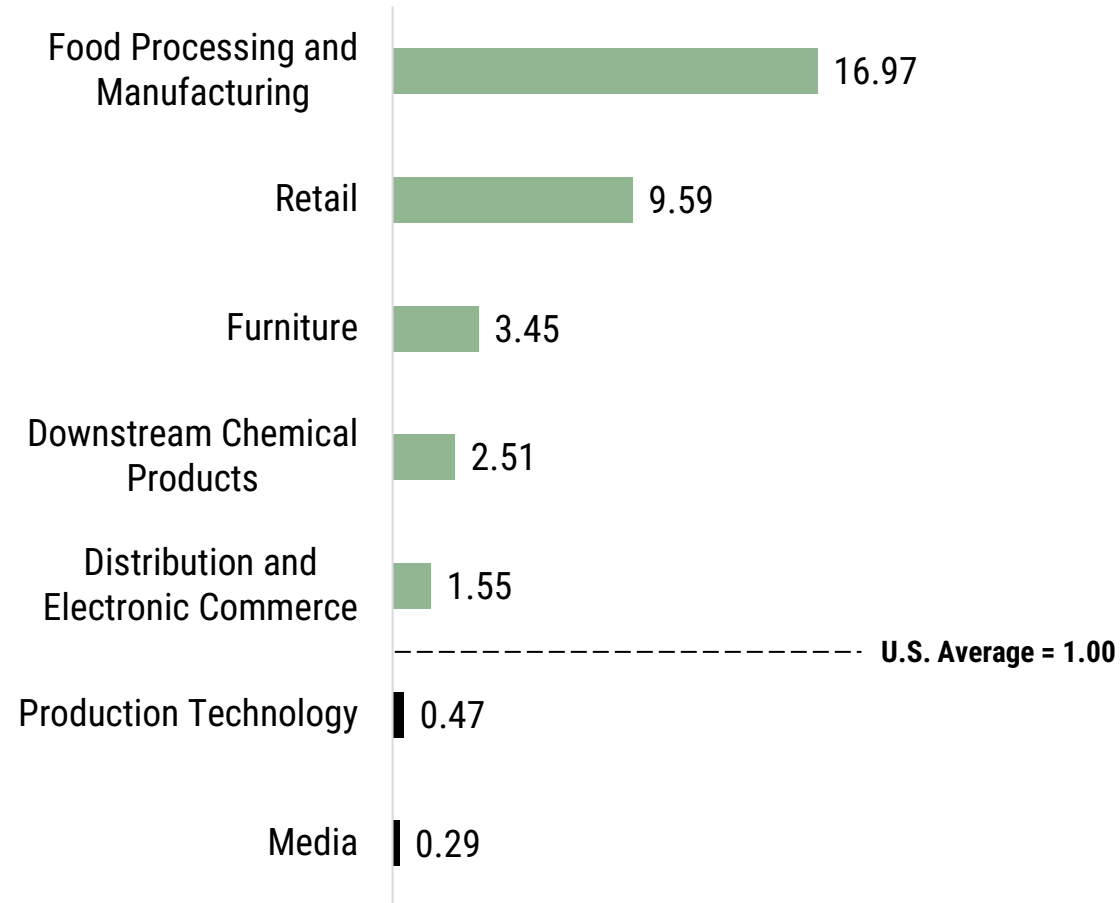
02

Competitiveness

The competitiveness, value, and growth of
Mesquite's industry clusters

Mesquite has 5 clusters with a significant competitive advantage.

OVERALL CLUSTER LOCATION QUOTIENT, 2021

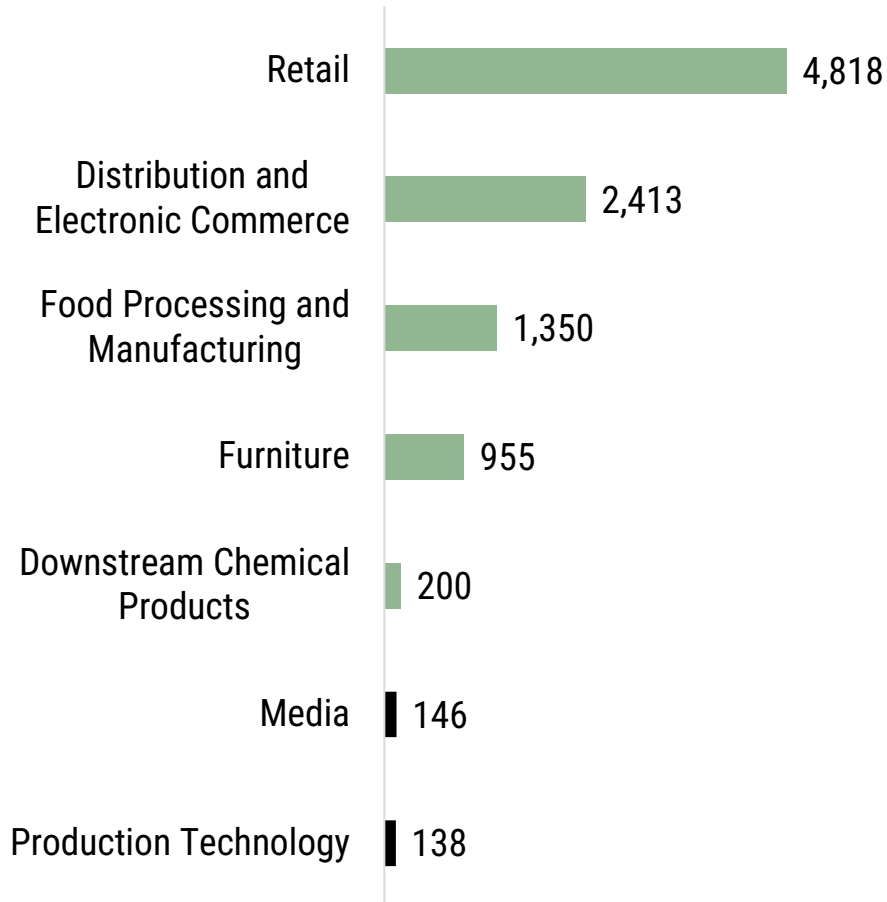


Downstream chemical products: Liquefied natural gas, gasoline, heating oil, synthetic rubber, plastics, lubricants, antifreeze, fertilizers, and more. Production technology includes the production of use heavy use machinery.

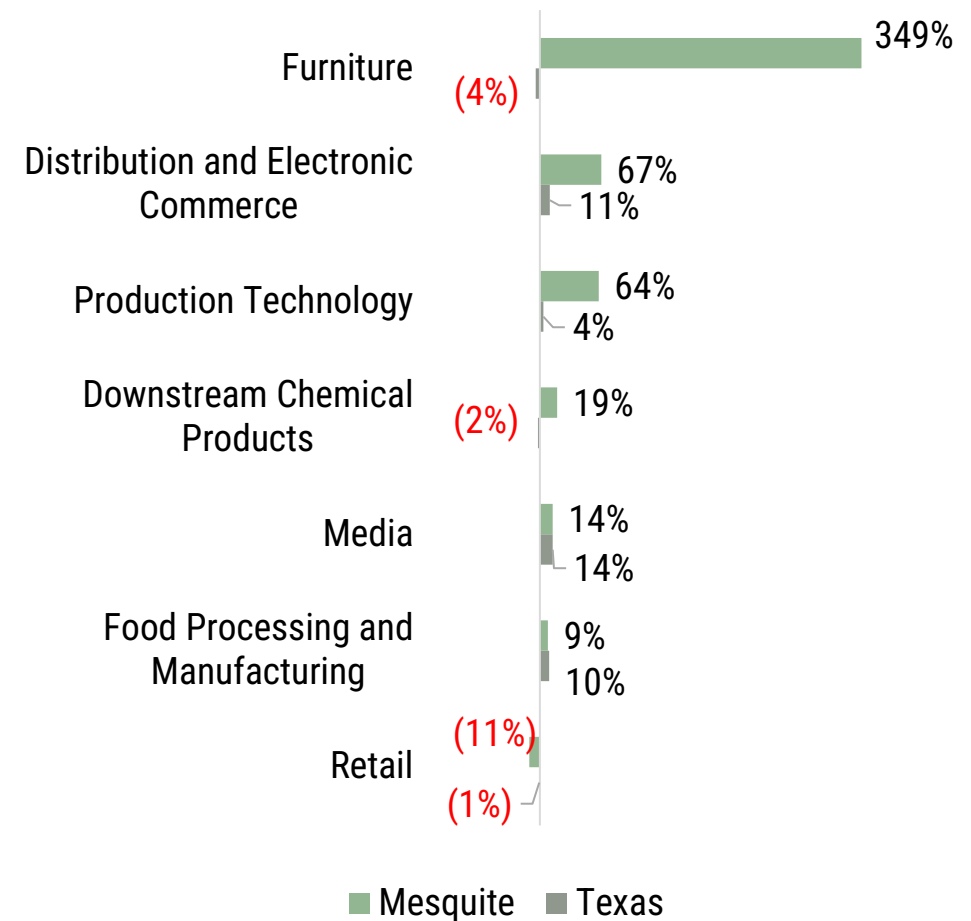
Green shading indicates a cluster LQ >1.00
Source: Emsi Burning Glass Market Analytics, 2021
City of Mesquite employment records

Mesquite's largest employment cluster is Retail. The fastest-growing is Furniture.

TOTAL EMPLOYMENT, 2021



5-YEAR JOB GROWTH, 2016-2021



■ Mesquite ■ Texas

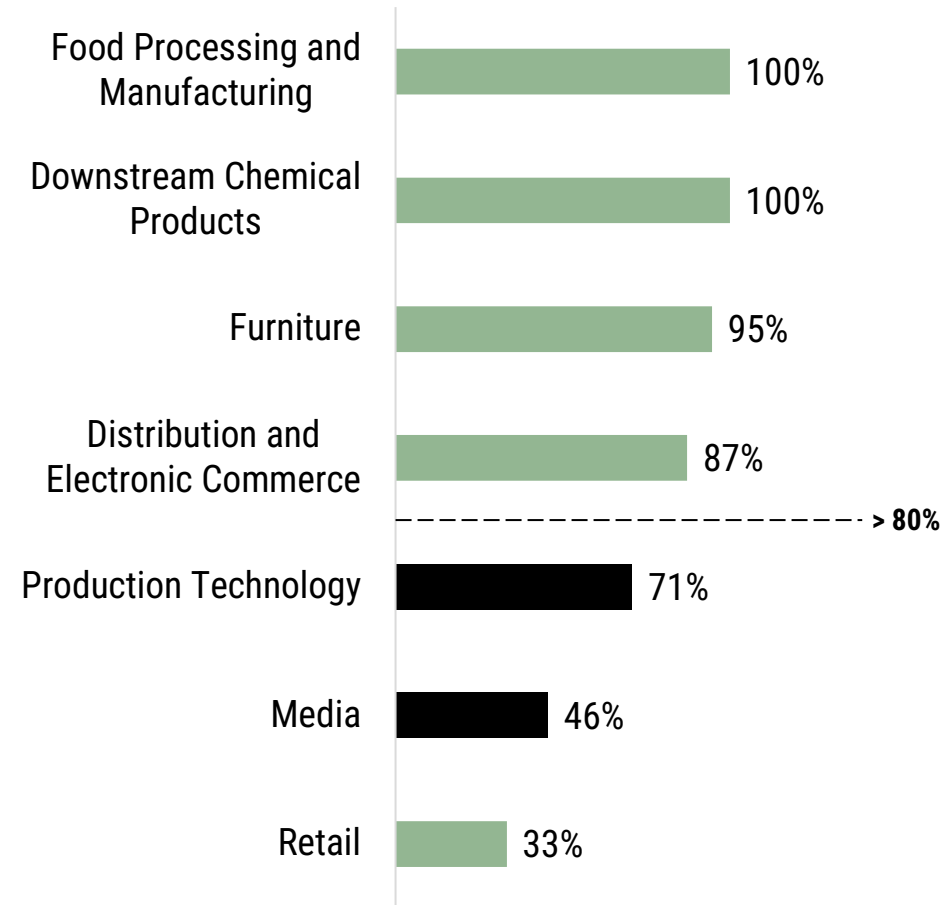
Green shading indicates a cluster LQ > 1.00

Source: Emsi Burning Glass Market Analytics, 2016 & 2021

City of Mesquite employment records

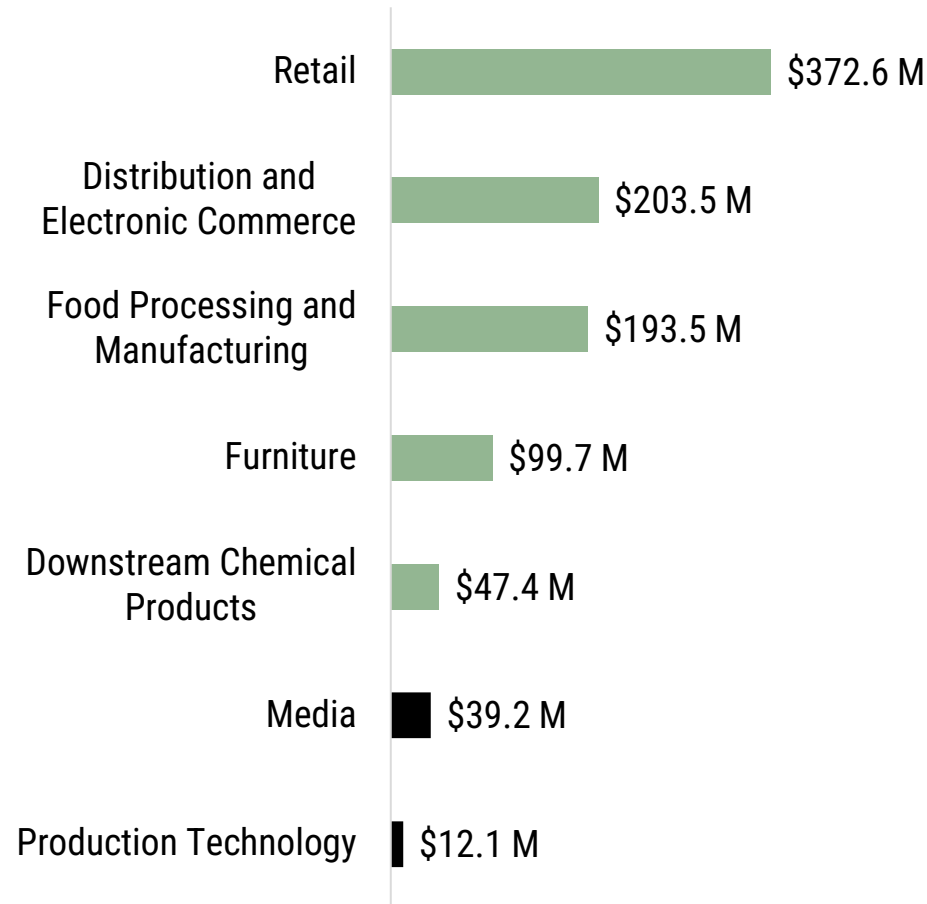
4 traded clusters have more than 8 in 10 workers employed in competitive industries.

SHARE OF CLUSTER EMPLOYEES IN INDUSTRIES WITH AN LQ>1.25, 2021

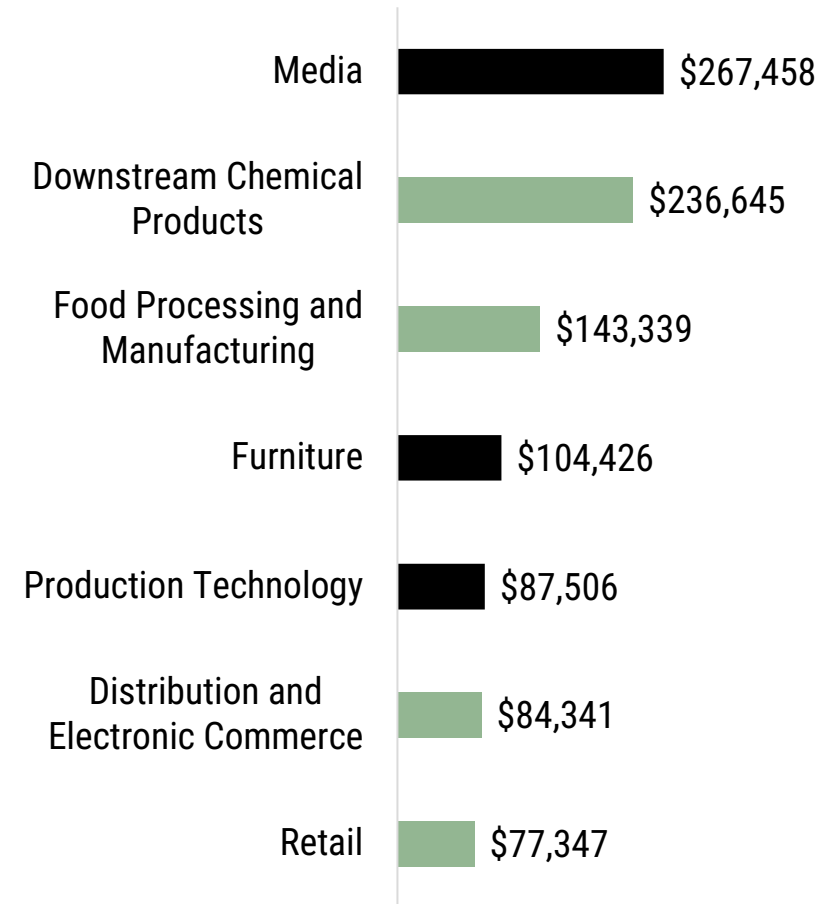


Mesquite's largest cluster contribution to Gross Regional Product (GRP) is from Retail, and its most productive cluster by GRP per worker is Media.

TOTAL GRP, 2021



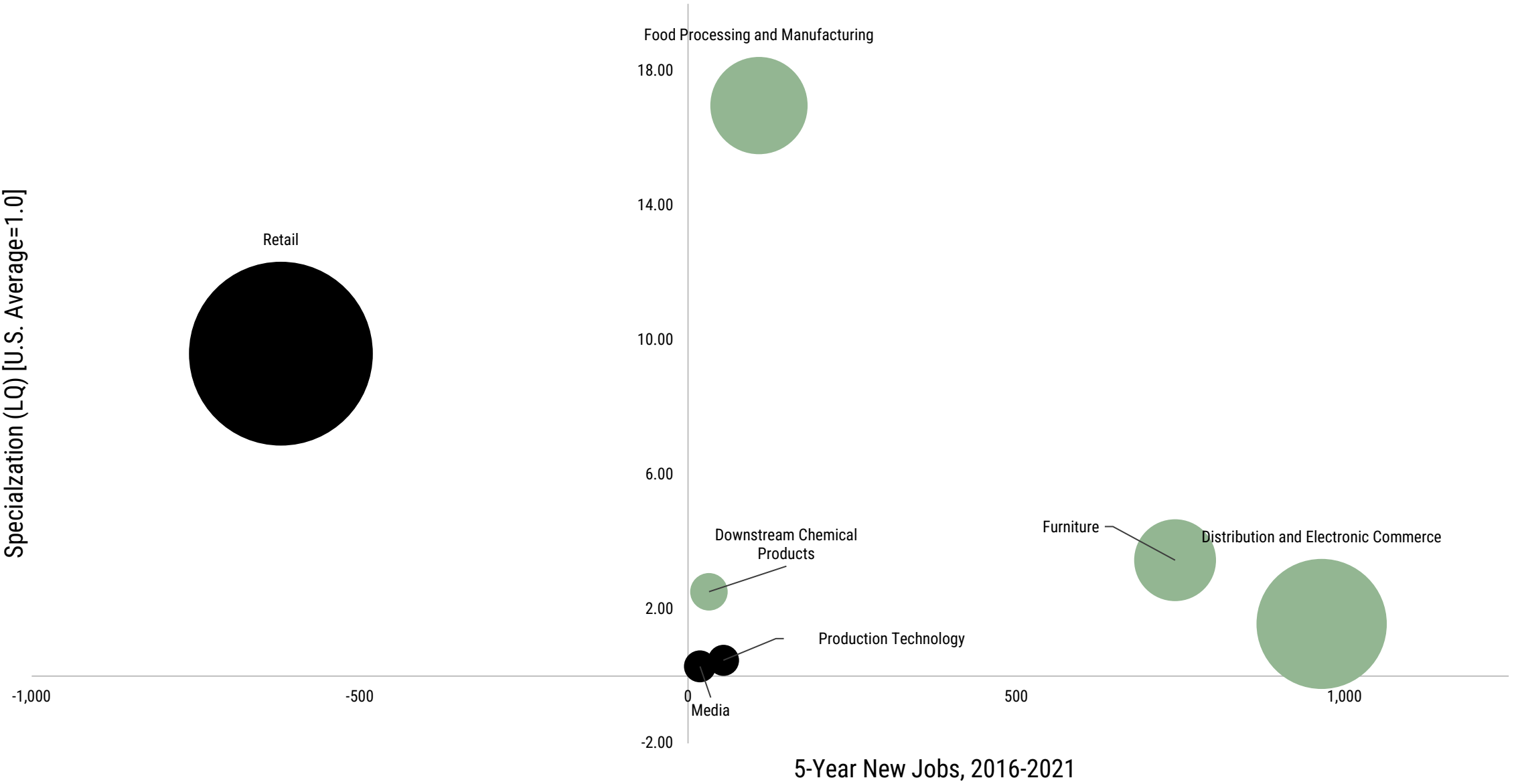
GRP PER WORKER, 2021



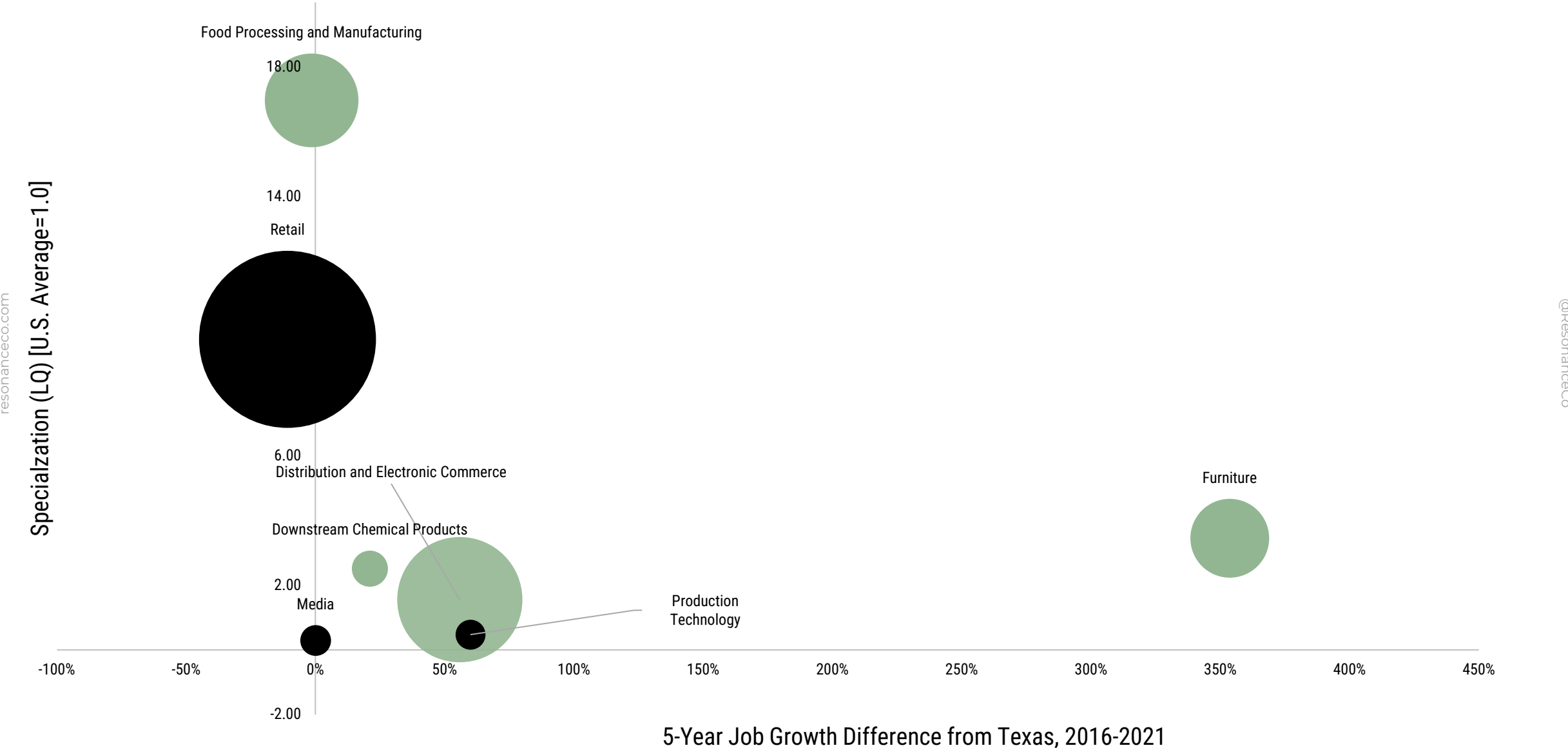
Green shading indicates a cluster LQ >1.00
 Source: Emsi Burning Glass Market Analytics, 2021
 City of Mesquite employment records

Specialization (LQ) [U.S. Average=1.0]

Size of Bubble: Total Employment



Size of Bubble: Total Employment



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Source: Emsi Burning Glass Market Analytics, 2016 & 2021
City of Mesquite employment records

Competitiveness

	Overall Cluster LQ (2021)	Share of Cluster Employees in industries LQ > 1.25 (2021)	Total Employment (2021)	5-Year Job Growth (2016-2021)		Total GRP in billions (2021)	GRP per worker in thousands (2021)
Food Processing and Manufacturing	16.97	100%	1,350	9%	\$	193.5 \$	143,339
Retail	9.59	33%	4,818	(11%)	\$	372.6 \$	77,347
Furniture	3.45	95%	955	349%	\$	99.7 \$	104,426
Downstream Chemical Products	2.51	100%	200	19%	\$	47.4 \$	236,645
Distribution and Electronic Commerce	1.60	87%	2,413	67%	\$	203.5 \$	84,341
Production Technology	0.47	71%	138	64%	\$	12.1 \$	87,506
Media	0.29	46%	146	14%	\$	39.2 \$	267,458

Competitiveness

Overall Cluster LQ (2021)	Share of Cluster Employees in industries LQ > 1.25 (2021)	Total Employment (2021)	5-Year Job Growth (2016-2021)	Total GRP in billions (2021)	GRP per worker in thousands (2021)
Food Processing and Manufacturing	Food Processing and Manufacturing	Retail	Furniture	Retail	Media
Retail	Downstream Chemical Products	Distribution and Electronic Commerce	Distribution and Electronic Commerce	Distribution and Electronic Commerce	Downstream Chemical Products
Furniture	Furniture	Food Processing and Manufacturing	Production Technology	Food Processing and Manufacturing	Food Processing and Manufacturing
Downstream Chemical Products	Distribution and Electronic Commerce	Furniture	Downstream Chemical Products	Furniture	Furniture
Distribution and Electronic Commerce	Production Technology	Downstream Chemical Products	Media	Downstream Chemical Products	Production Technology
Production Technology	Media	Media	Food Processing and Manufacturing	Media	Distribution and Electronic Commerce
Media	Retail	Production Technology	Retail	Production Technology	Retail

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	Competitiveness Ranking
Food Processing and Manufacturing	1
Retail	2
Furniture	3
Distribution and Electronic Commerce	4
Downstream Chemical Products	5
Media	6
Production Technology	7

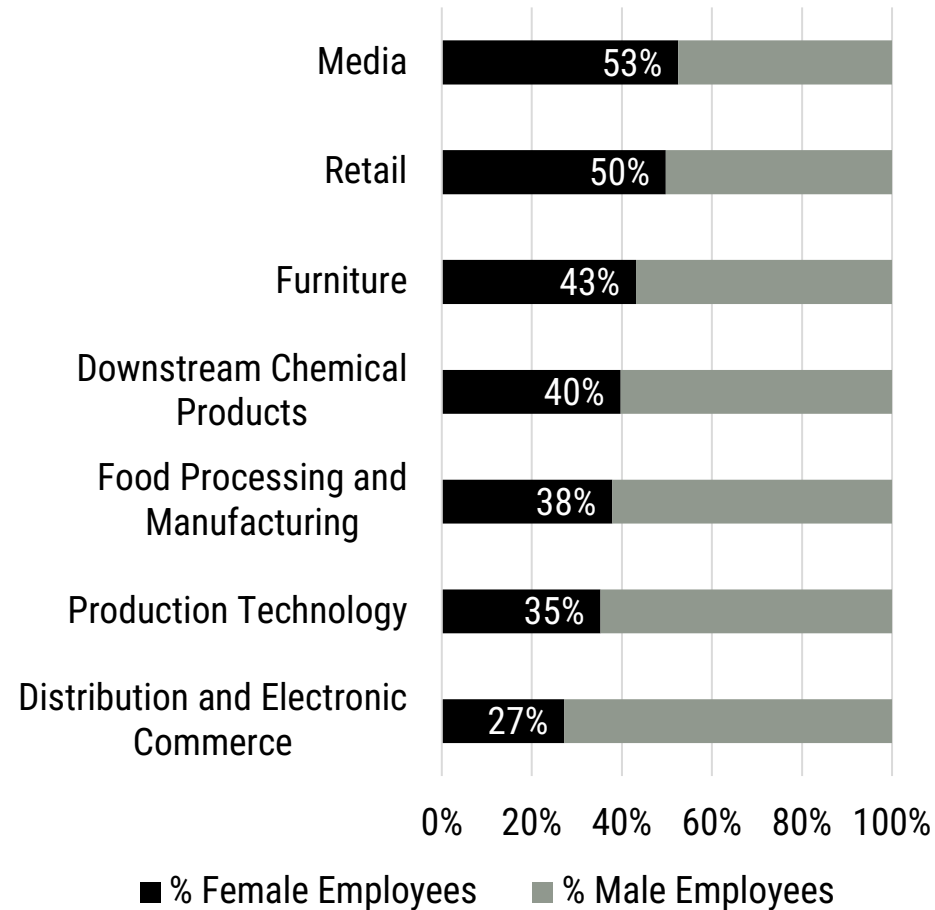
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Equity

The opportunities for all community members
in Mesquite's industry clusters

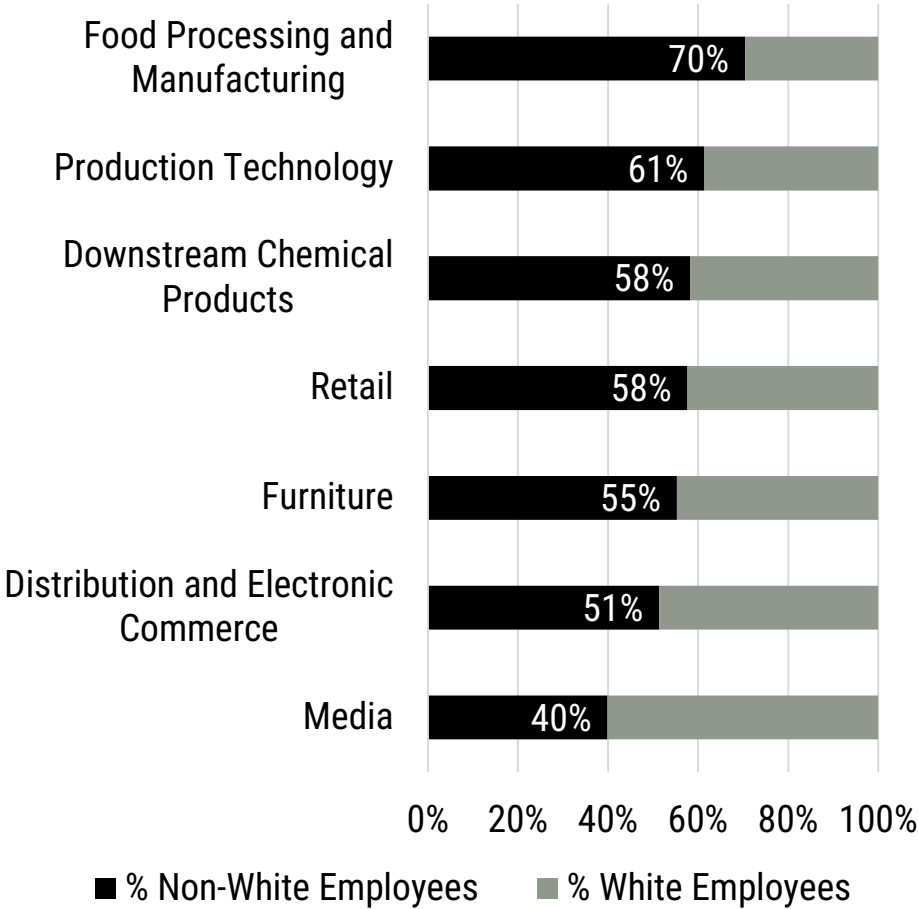
Media and Retail have the largest share of females employees.

SHARE OF EMPLOYEES BY GENDER, 2021



Nearly 7 in 10 workers in the Food Processing and Manufacturing cluster are People of Color (POC).

SHARE OF EMPLOYEES BY RACE, 2021



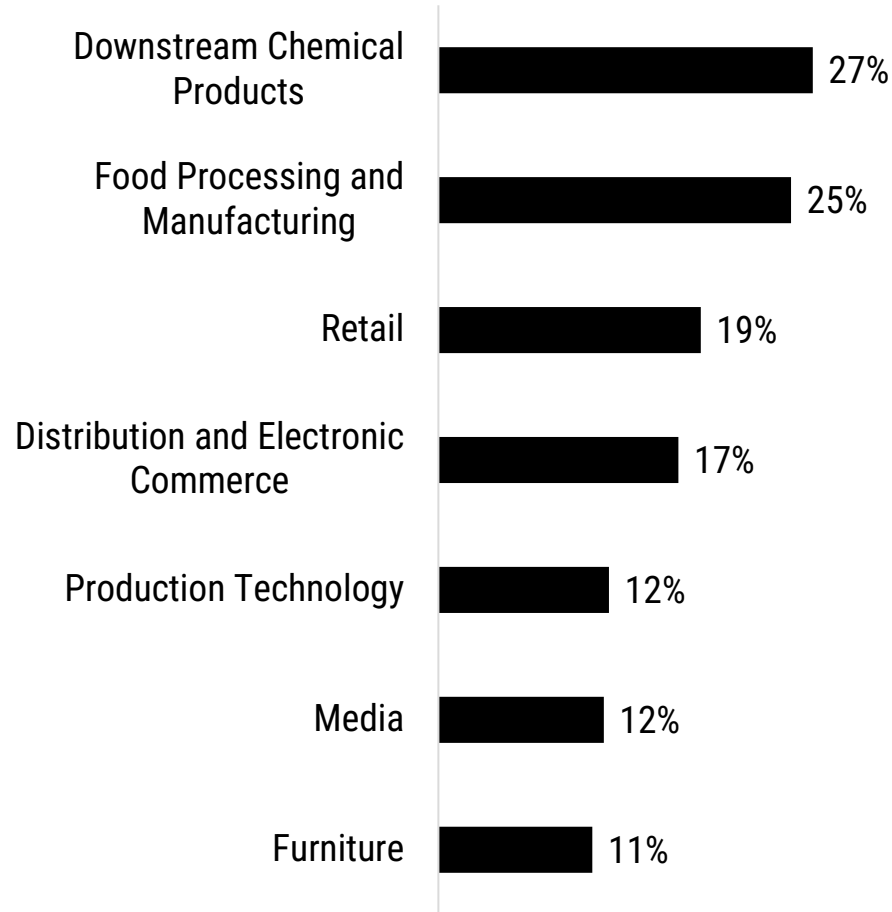
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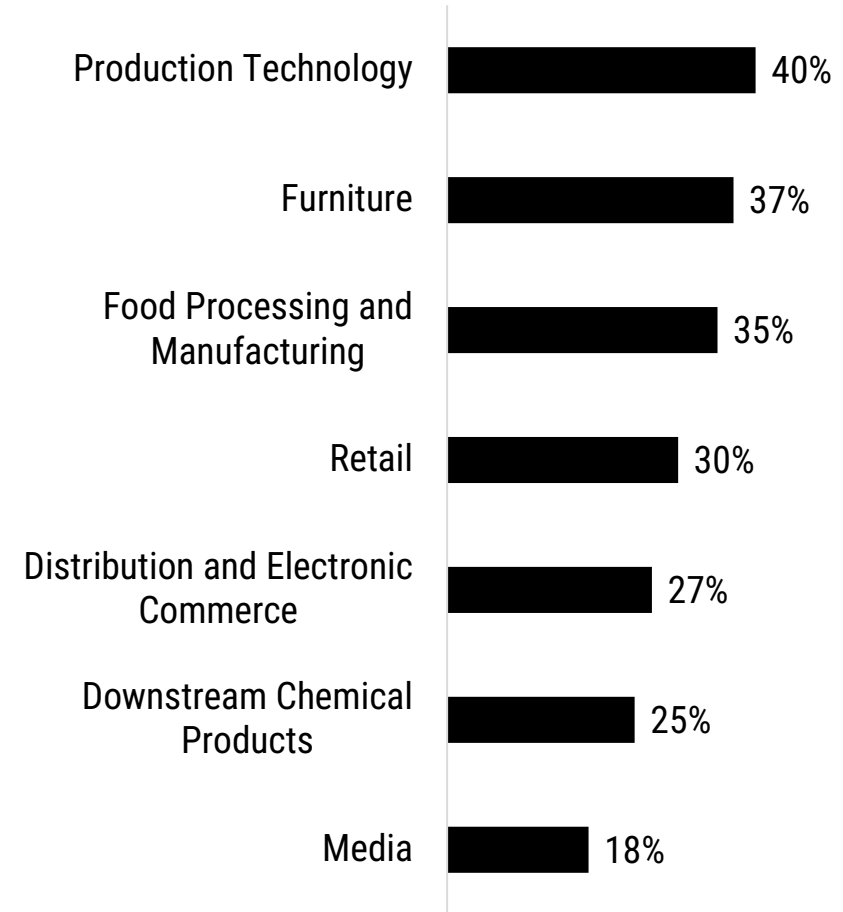
Source: Emsi Burning Glass Market Analytics, 2021

Black employees are highest represented in the Downstream Chemical Products cluster. Hispanic employees are highest represented in Production Technology.

SHARE OF BLACK EMPLOYEES, 2021

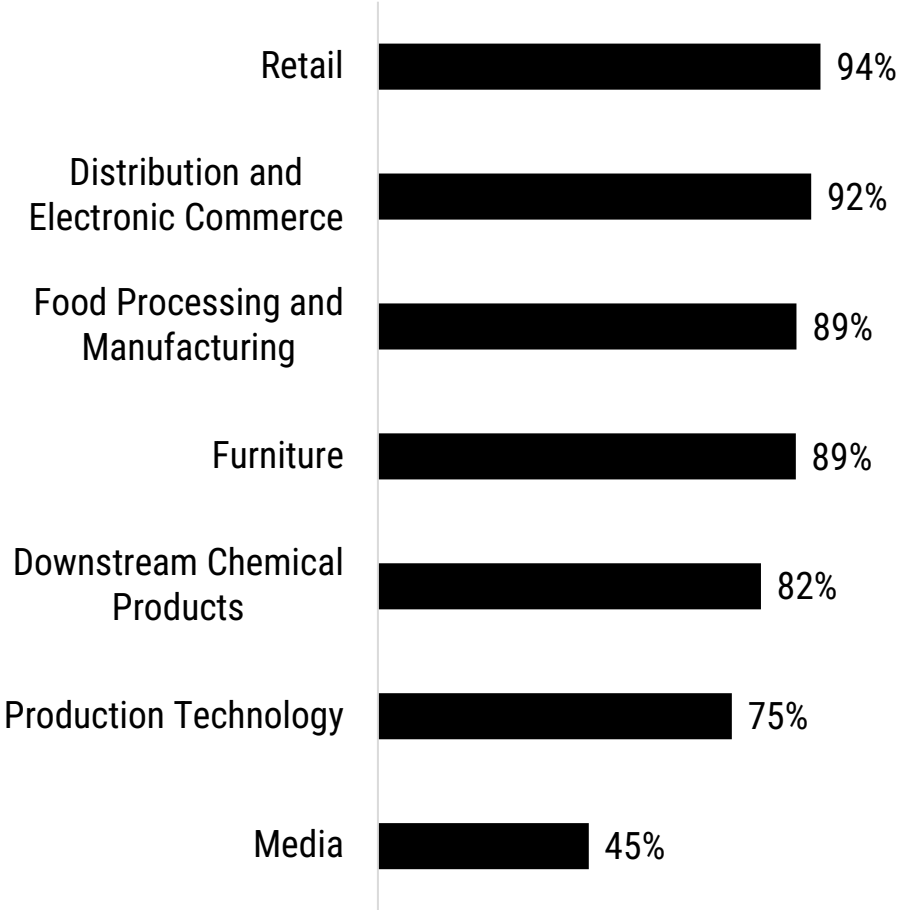


SHARE OF HISPANIC EMPLOYEES, 2021



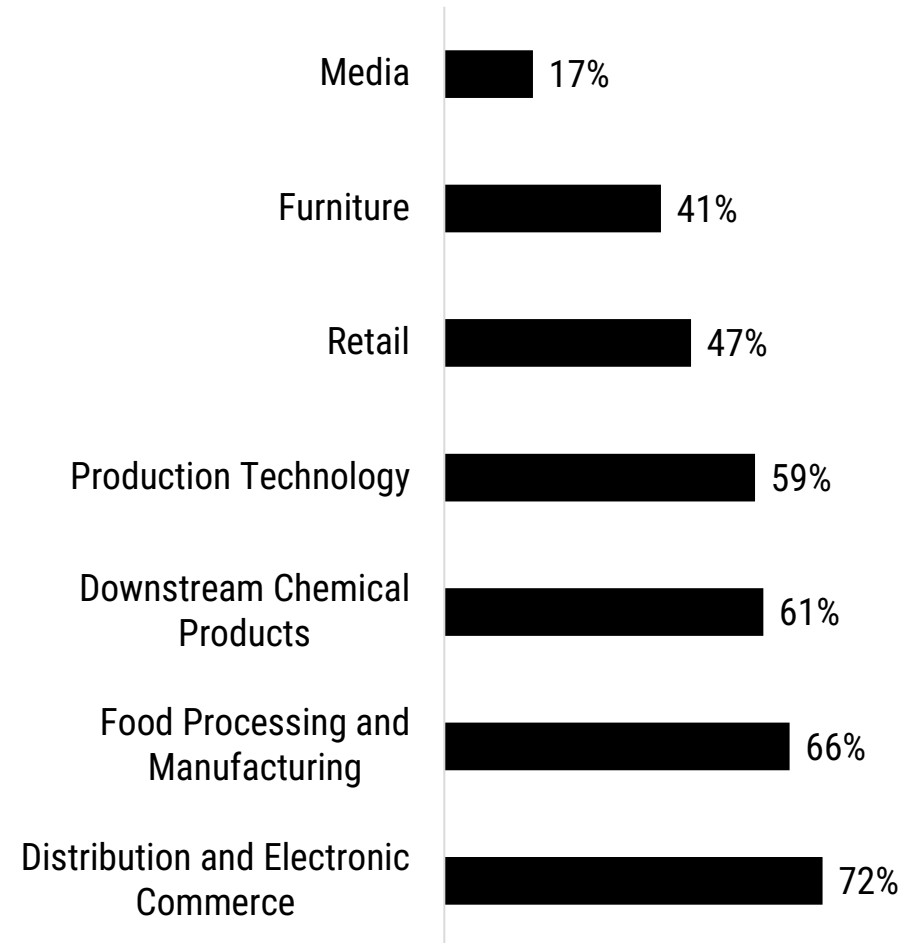
More than 9 in 10 of workers in the Retail and Distribution and E-Commerce clusters have less than a Bachelor's degree.

SHARE OF EMPLOYEES WITH LESS THAN A BACHELOR'S DEGREE, 2021



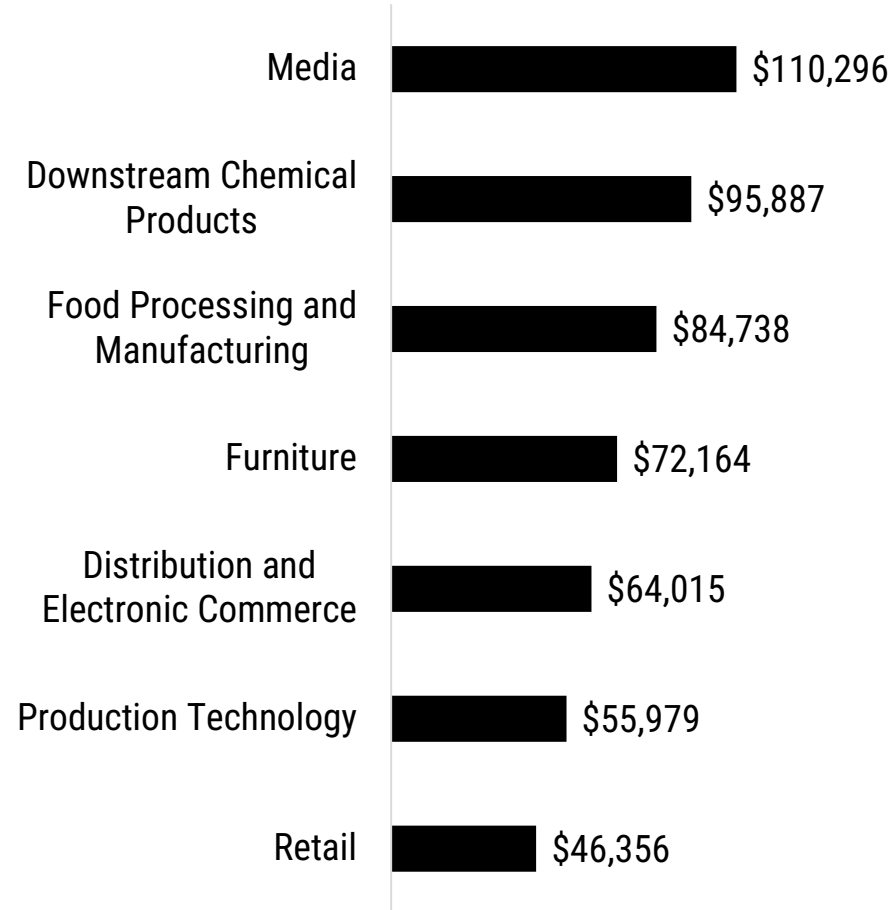
Media has the least share of jobs at risk of automation.

SHARE OF JOBS AT RISK OF AUTOMATION (INDEX > 100), 2021



Media the highest earnings per worker.

EARNINGS PER WORKER, 2021



Equity

	Share of Female Employees (2021)	Share of Non-White Employees (2021)	Share of Black Employees (2021)	Share of Hispanic Employees (2021)	Share of Talent with less than a Bachelor's degree (2021)	Share of Jobs at Risk for Automation (Index > 100) (2021)	Earnings Per Workers (2021)
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Food Processing and Manufacturing

38%

70%

25%

35%

89%

66%

\$84,738

Downstream Chemical Products

40%

58%

27%

25%

82%

61%

\$95,887

Retail

50%

58%

19%

30%

94%

47%

\$46,356

Furniture

43%

55%

11%

37%

89%

41%

\$72,164

Media

53%

40%

12%

18%

45%

17%

\$110,296

Production Technology

35%

61%

12%

40%

75%

59%

\$55,979

Distribution and Electronic Commerce

27%

51%

17%

27%

92%

72%

\$64,015

Equity

Share of Female Employees (2021)	Share of Non-White Employees (2021)	Share of Black Employees (2021)	Share of Hispanic Employees (2021)	Share of Talent with less than a Bachelor's degree (2021)	Share of Jobs at Risk for Automation (Index > 100) (2021)	Earnings Per Workers (2021)
Media	Food Processing and Manufacturing	Downstream Chemical Products	Production Technology	Media	Media	Media
Retail	Production Technology	Food Processing and Manufacturing	Furniture	Production Technology	Furniture	Downstream Chemical Products
Furniture	Downstream Chemical Products	Retail	Food Processing and Manufacturing	Downstream Chemical Products	Retail	Food Processing and Manufacturing
Downstream Chemical Products	Retail	Distribution and Electronic Commerce	Retail	Furniture	Production Technology	Furniture
Food Processing and Manufacturing	Furniture	Production Technology	Distribution and Electronic Commerce	Food Processing and Manufacturing	Downstream Chemical Products	Distribution and Electronic Commerce
Production Technology	Distribution and Electronic Commerce	Media	Downstream Chemical Products	Distribution and Electronic Commerce	Food Processing and Manufacturing	Production Technology
Distribution and Electronic Commerce	Media	Furniture	Media	Retail	Distribution and Electronic Commerce	Retail

Equity Ranking

Food Processing and Manufacturing	1
Downstream Chemical Products	2
Retail	3
Furniture	4
Media	5
Production Technology	6
Distribution and Electronic Commerce	7

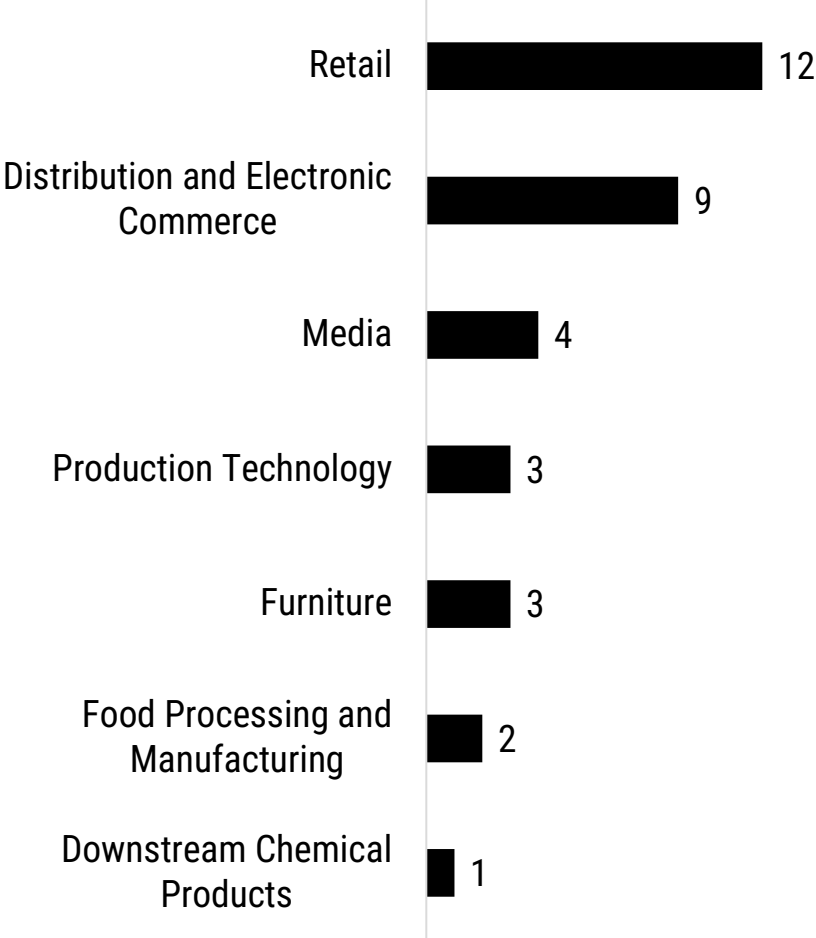
04

Resilience

The sustainability of Mesquite's industry clusters and their capacity to re-adapt after shocks

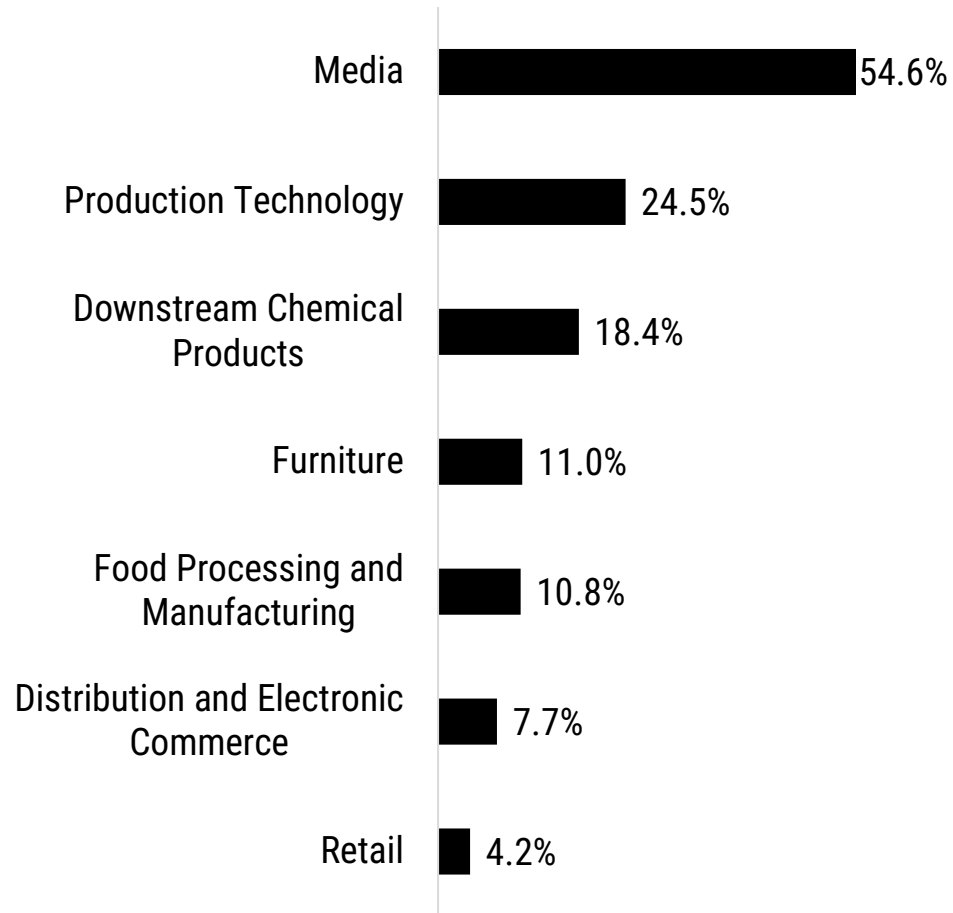
Retail and Distribution and E-Commerce are the two clusters with the highest number of industries.

NUMBER OF INDUSTRIES IN CLUSTER, 2021

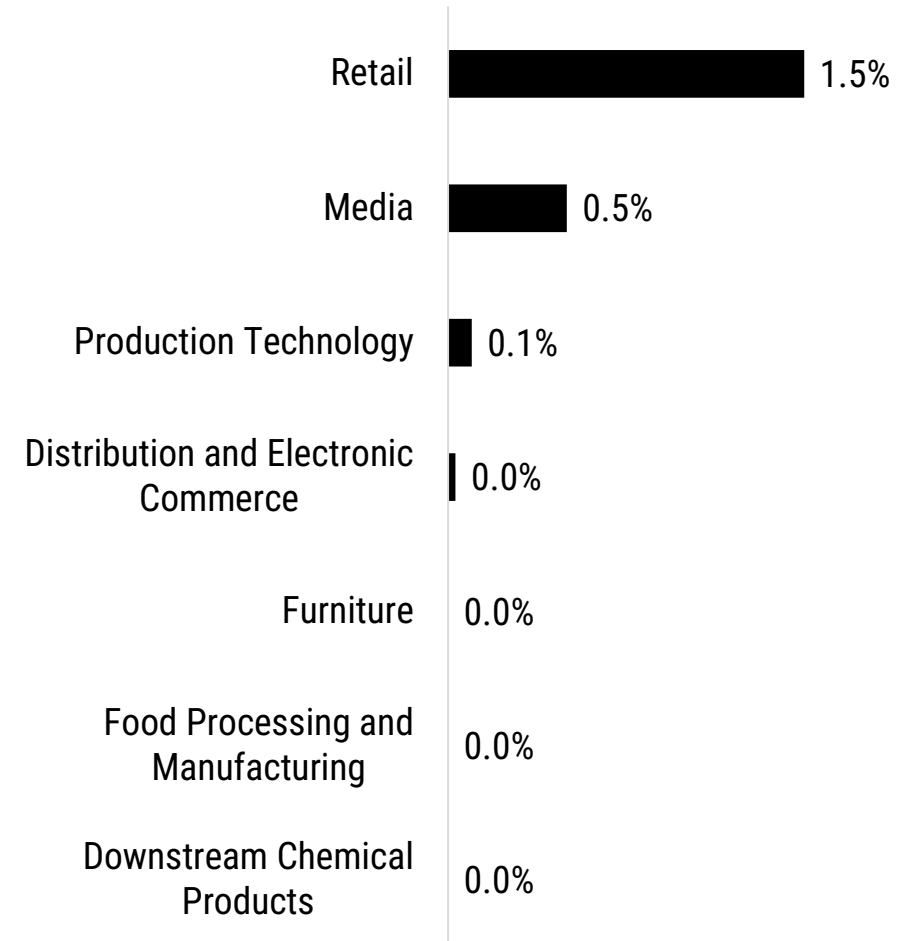


More than half Media workers have a Bachelor's degree or higher.

SHARE OF EMPLOYEES WITH A BACHELOR'S DEGREE, 2021

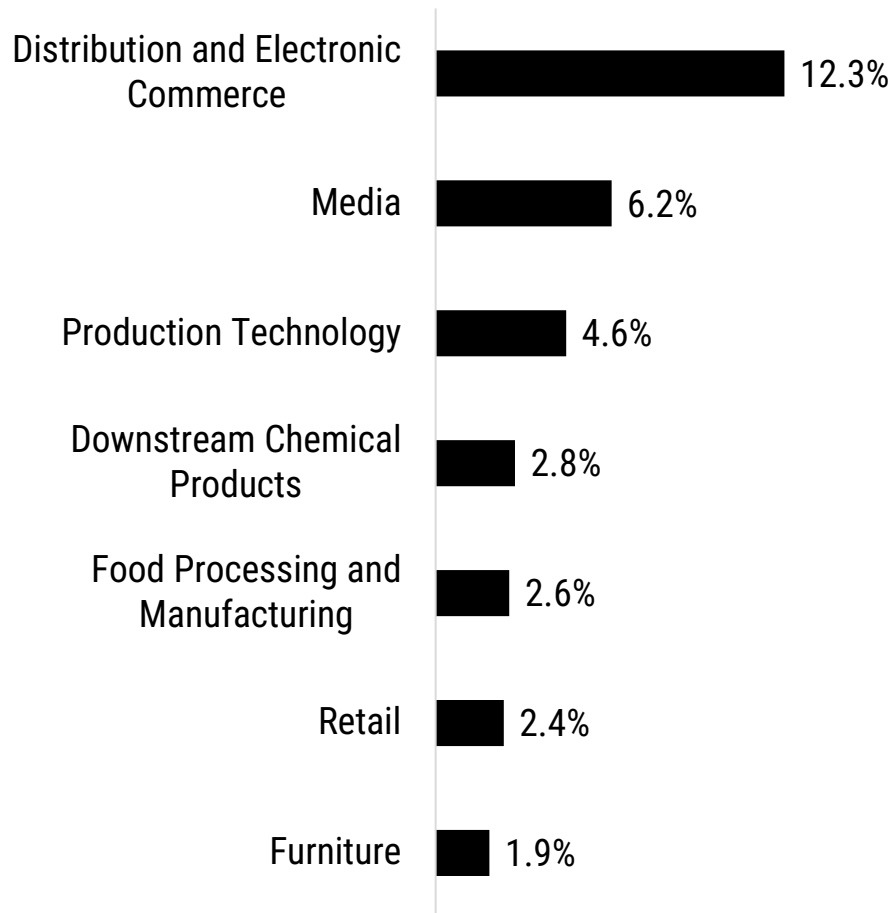


SHARE OF EMPLOYEES WITH A GRADUATE DEGREE, 2021

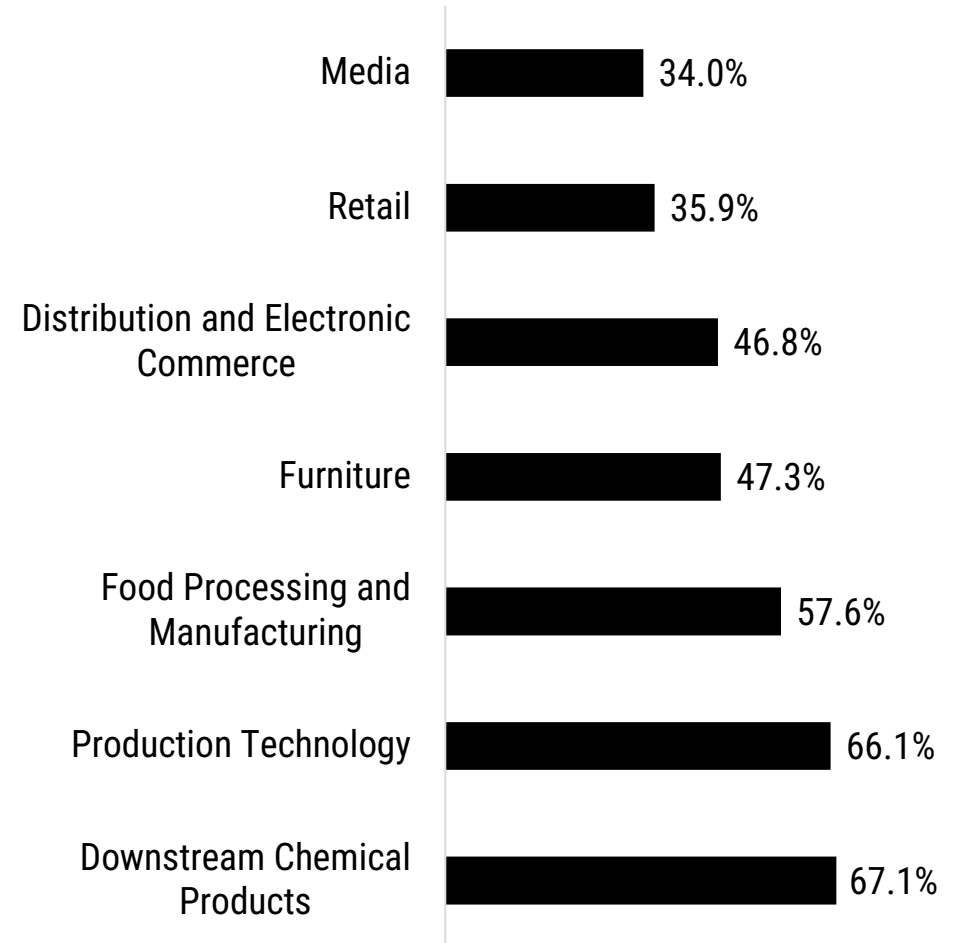


Almost 7 in 10 Downstream Chemical Products and Production Technology workers have a high school diploma.

SHARE OF EMPLOYEES WITH A
AN ASSOCIATES DEGREE OR CERTIFICATE, 2021



SHARE OF EMPLOYEES WITH A HIGH
SCHOOL DIPLOMA, 2021



Source: Emsi Burning Glass Market Analytics, 2021

Resilience

	Number of Industries (3-digit)	Share of Female Employees	Share of Non-White Employees	Graduate Degree Employees (%)	Bachelor Degree Employees (%)	Associates Degree or Certificate (%)	High School Diploma (%)
Distribution and Electronic Commerce	9	27%	51%	0.0%	8%	12%	47%
Downstream Chemical Products	1	40%	58%	0.0%	18%	3%	67%
Food Processing and Manufacturing	2	38%	70%	0.0%	11%	3%	58%
Furniture	3	43%	55%	0.0%	11%	2%	47%
Media	4	53%	40%	0.5%	55%	6%	34%
Production Technology	3	35%	61%	0.1%	25%	5%	66%
Retail	12	50%	58%	1.5%	4%	2%	36%

Resilience

Number of Industries (3-digit) (2021)	Share of Female Employees (2021)	Share of Non-White Employees (2021)	Graduate Degree Employees (%) (2021)	Bachelor Degree Employees (%) (2021)	Associates Degree or Certificate (%) (2021)	High School Diploma (%) (2021)
Retail	Media	Food Processing and Manufacturing	Retail	Media	Distribution and Electronic Commerce	Media
Distribution and Electronic Commerce	Retail	Production Technology	Media	Production Technology	Media	Retail
Media	Furniture	Downstream Chemical Products	Production Technology	Downstream Chemical Products	Production Technology	Distribution and Electronic Commerce
Production Technology	Downstream Chemical Products	Retail	Distribution and Electronic Commerce	Furniture	Downstream Chemical Products	Furniture
Furniture	Food Processing and Manufacturing	Furniture	Food Processing and Manufacturing	Food Processing and Manufacturing	Food Processing and Manufacturing	Food Processing and Manufacturing
Food Processing and Manufacturing	Production Technology	Distribution and Electronic Commerce	Downstream Chemical Products	Distribution and Electronic Commerce	Retail	Production Technology
Downstream Chemical Products	Distribution and Electronic Commerce	Media	Furniture	Retail	Furniture	Downstream Chemical Products

	Resilience Ranking
Retail	1
Media	2
Distribution and Electronic Commerce	3
Furniture	4
Production Technology	5
Food Processing and Manufacturing	6
Downstream Chemical Products	7

05

Cluster Overview

Competitiveness Ranking	Equity Ranking	Resilience Ranking
Food Processing and Manufacturing	Food Processing and Manufacturing	Retail
Retail	Downstream Chemical Products	Media
Furniture	Retail	Distribution and Electronic Commerce
Distribution and Electronic Commerce	Furniture	Furniture
Downstream Chemical Products	Media	Production Technology
Media	Production Technology	Food Processing and Manufacturing
Production Technology	Distribution and Electronic Commerce	Downstream Chemical Products



KEY TAKEAWAYS

- The **Food Processing and Manufacturing** cluster is the strongest in terms of competitive advantage. It is the largest employer of POC. Growth in this cluster is also largely attributed to the unique competitive advantage of Mesquite.
- The **Retail** cluster is the largest employer and the largest contributor to the economy in terms of GRP. It is the 2nd largest employer of women. However, it lost the largest number of jobs in the last 5 years.
- The **Furniture** cluster is competitive and has the highest growth rate. It has the 2nd highest share of Hispanic employees and has the 2nd lowest share of jobs at risk of automation.
- The **Downstream Chemical Products** cluster is 4th in terms of competitive advantage and the 2nd most productive cluster in terms of GRP per worker. It has the highest share of Black workers.

KEY TAKEAWAYS

- The **Distribution and E-Commerce** cluster has the 2nd fastest growth among all clusters. It is the 2nd largest employer and the 2nd largest contributor to the economy in terms of GRP.
- The **Production Technology** cluster is not competitive except for industrial process furnace and oven manufacturing. It has the 3rd highest growth rate as a result of a unique competitive advantage of Mesquite. It also has the highest share of Hispanic employees, and the 2nd highest share of employees with a Bachelor's Degree.
- The **Media** cluster is not competitive except for two key industries: sound recording and graphic design. This is the most productive cluster in terms of GRP per worker, offers the highest earnings, is the largest employer of women, has the most educated workforce, and has the lowest share of jobs at risk of automation.

06

Target Cluster Profiles



Food Processing and Manufacturing

LQ: 16.97

Total Employment: 1,350

Annual Average Salary: \$84,738

Cluster assets:

- Pepsi plant – \$13.3m in sales
- The Pickle Juice Company - \$10.0m in sales
- Gourmet Cuisine Inc. - \$4.1m in sales
- #1 in terms of competitive advantage
- Largest employer of POC

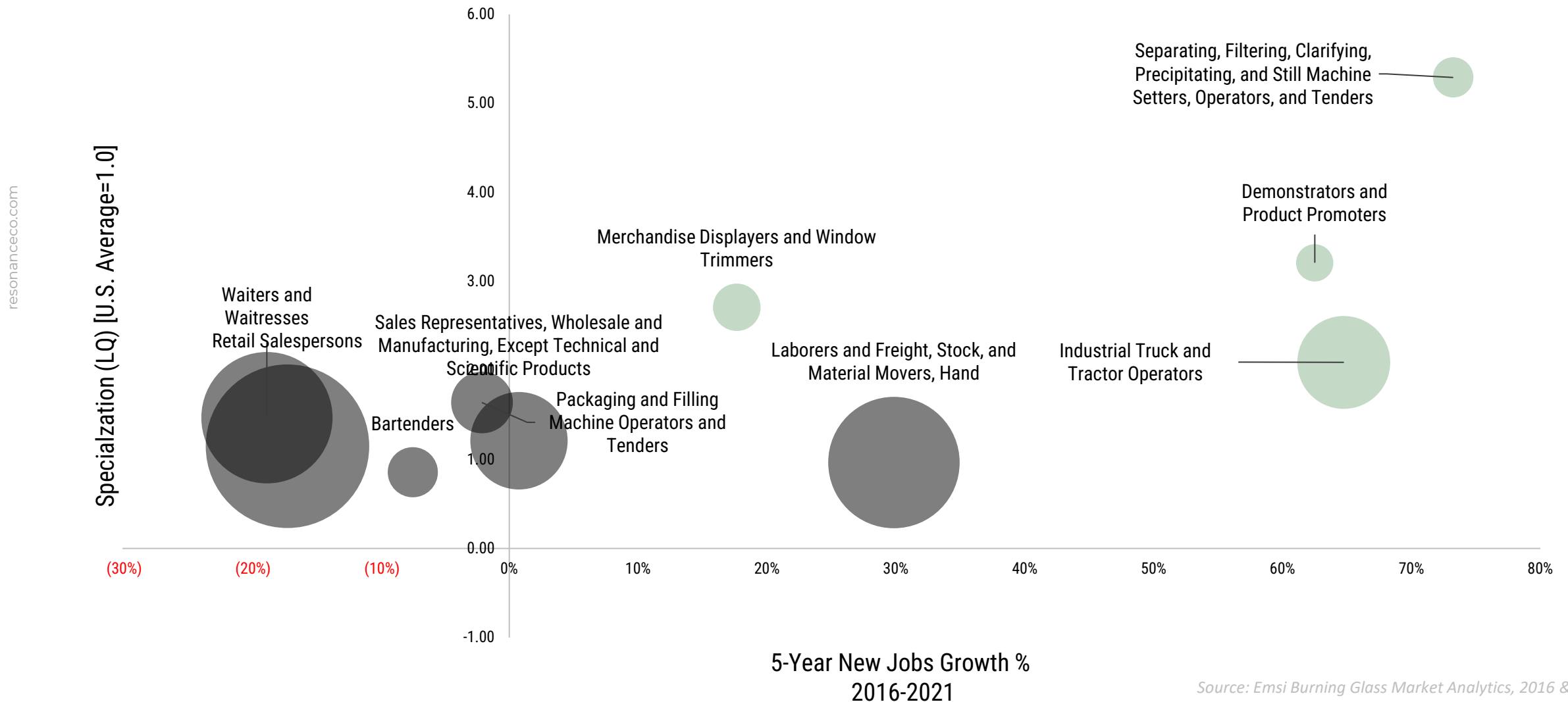
Food Processing and Manufacturing – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		1,350	108	8.7%	16.97	\$84,738
312111	Soft Drink Manufacturing	1,113	107	10.6%	40.34	\$88,129
312113	Ice Manufacturing	50	(39)	(43.7%)	20.74	\$71,824
311830	Tortilla Manufacturing	50	(5)	(8.8%)	7.39	\$51,595
311942	Spice and Extract Manufacturing	58	14	30.8%	6.47	\$84,234
311919	Other Snack Food Manufacturing	45	9	23.4%	2.94	\$76,213
311991	Perishable Prepared Food Manufacturing	35	22	184.2%	1.72	\$53,688
311412	Frozen Specialty Food Manufacturing	0	0	0.0%	0.00	\$0

Grey shading shows industry competitive advantage (LQ>1.0)

Food Processing and Manufacturing – Key Occupations

Size of Bubble: Total Employment



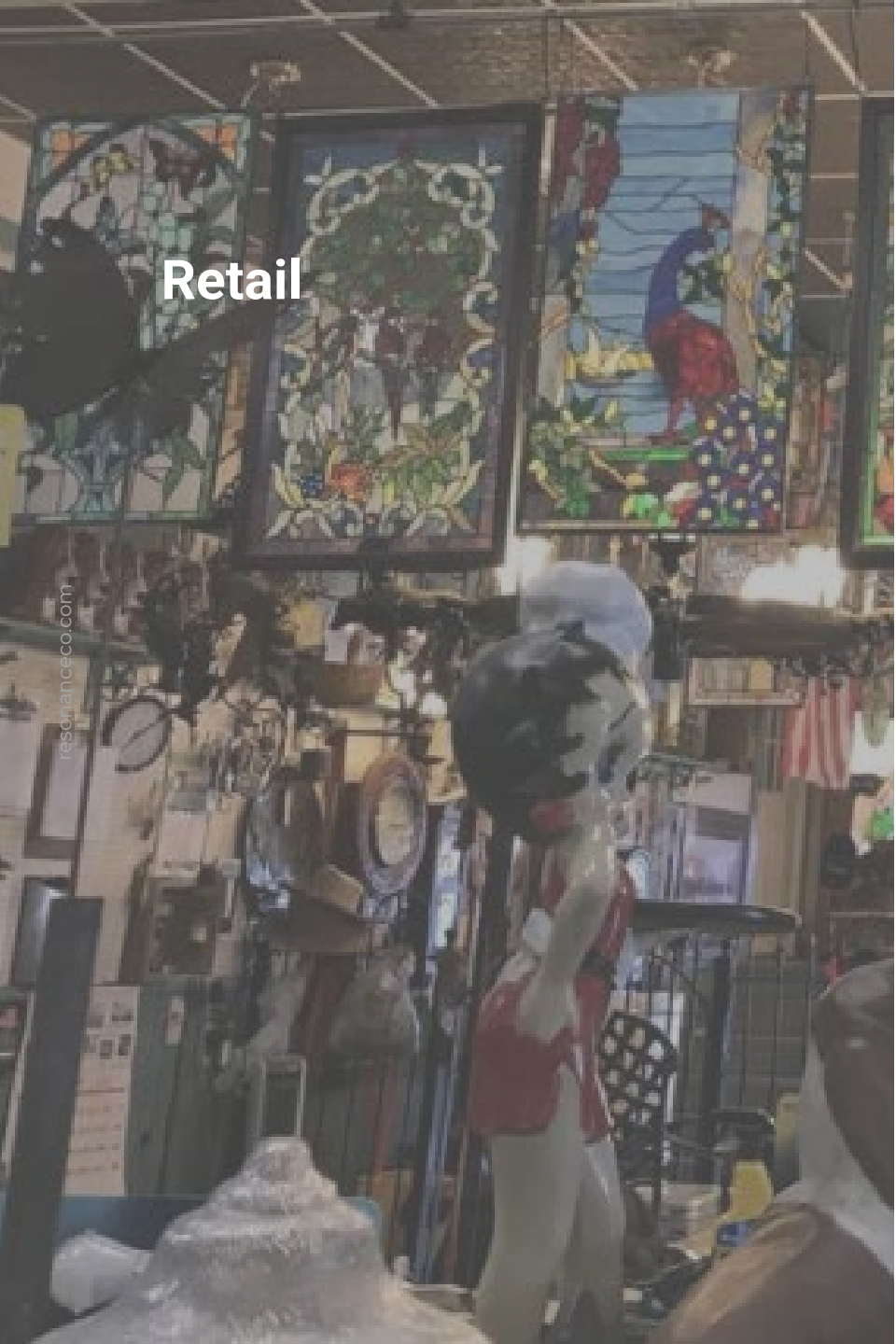
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Source: Emsi Burning Glass Market Analytics, 2016 & 2021

Food Processing and Manufacturing – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median Annual Wage	Typical Entry Level Education	Typical On-The-Job Training
51-9111	Packaging and Filling Machine Operators and Tenders	140	(4)	(3%)	10.4%	\$ 31,482	High school diploma or equivalent	Moderate-term on-the-job training
51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	88	38	77%	6.5%	\$ 35,360	High school diploma or equivalent	Moderate-term on-the-job training
27-1026	Merchandise Displayers and Window Trimmers	63	17	35%	4.7%	\$ 30,648	High school diploma or equivalent	Short-term on-the-job training
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	63	12	25%	4.7%	\$ 66,472	High school diploma or equivalent	Moderate-term on-the-job training
41-9011	Demonstrators and Product Promoters	59	28	87%	4.4%	\$ 37,413	No formal educational credential	Short-term on-the-job training



Retail

LQ: 9.59

Total Employment: 4,818

Annual Average Salary: \$46,356

Cluster assets:

- Town East Mall and Market East Shopping Center
- Specialization in Automotive Parts and Accessories Stores: Ford - \$49.5m in sales, Superior Trailer Sales Co. - \$42.0m in sales, Txvtlimited Partnership (5031 N Galloway Ave) - \$39.3m in sales.
- Specialization in Clothing Stores: Dick's Sporting Goods, Macy's, and Dillard's.
- Largest employer
- Largest contributor to the economy in terms of GRP
- 2nd largest employer of women

Retail – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		4,818	(620)	(11.4%)	9.59	\$46,356
453991	Tobacco Stores	80	33	72.0%	4.86	\$32,108
448210	Shoe Stores	207	(12)	(5.4%)	3.70	\$29,094
446199	All Other Health and Personal Care Stores	66	1	1.2%	3.20	\$80,675
448110	Men's Clothing Stores	32	(50)	(61.3%)	2.94	\$46,336
445210	Meat Markets	52	(9)	(14.9%)	2.54	\$40,994
448140	Family Clothing Stores	329	(5)	(1.4%)	2.53	\$28,089
448190	Other Clothing Stores	71	(25)	(25.9%)	2.24	\$41,449
448150	Clothing Accessories Stores	29	(34)	(54.1%)	2.03	\$42,528
441310	Automotive Parts and Accessories Stores	248	2	1.0%	1.95	\$47,899
445291	Baked Goods Stores	11	(1)	(5.9%)	1.79	\$43,643
442110	Furniture Stores	123	(13)	(9.8%)	1.69	\$70,387
446120	Cosmetics, Beauty Supplies, and Perfume Stores	86	(136)	(61.2%)	1.60	\$32,871
447190	Other Gasoline Stations	50	6	14.2%	1.52	\$44,046

Grey shading shows an industry competitive advantage (LQ>1.25)

Retail – Cluster Profile (cont'd)

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
451140	Musical Instrument and Supplies Stores	13	(0)	(0.1%)	1.39	\$51,055
448120	Women's Clothing Stores	84	(108)	(56.1%)	1.39	\$36,132
453210	Office Supplies and Stationery Stores	37	(7)	(15.2%)	1.35	\$65,193
445120	Convenience Stores	71	(8)	(10.3%)	1.29	\$30,141
448130	Children's and Infants' Clothing Stores	15	(19)	(56.2%)	1.28	\$21,763
444190	Other Building Material Dealers	96	19	25.2%	1.19	\$70,510
441320	Tire Dealers	71	(3)	(4.4%)	1.14	\$51,801
446110	Pharmacies and Drug Stores	265	(2)	(0.7%)	1.11	\$64,635
453310	Used Merchandise Stores	62	(3)	(4.4%)	1.09	\$30,730
452210	Department Stores	345	(146)	(29.7%)	1.09	\$44,042
443142	Electronics Stores	142	(21)	(12.8%)	1.07	\$84,730
448310	Jewelry Stores	36	1	1.6%	1.07	\$75,092
446130	Optical Goods Stores	24	(5)	(15.6%)	1.07	\$51,174
447110	Gasoline Stations with Convenience Stores	305	(84)	(21.5%)	1.05	\$32,553
444110	Home Centers	285	4	1.3%	1.02	\$39,921
453998	All Other Miscellaneous Store Retailers (except Tobacco Stores)	55	(6)	(9.6%)	0.90	\$61,554

Grey shading shows an industry competitive advantage (LQ>1.25)

Source: Emsi Burning Glass Market Analytics, 2016 & 2021

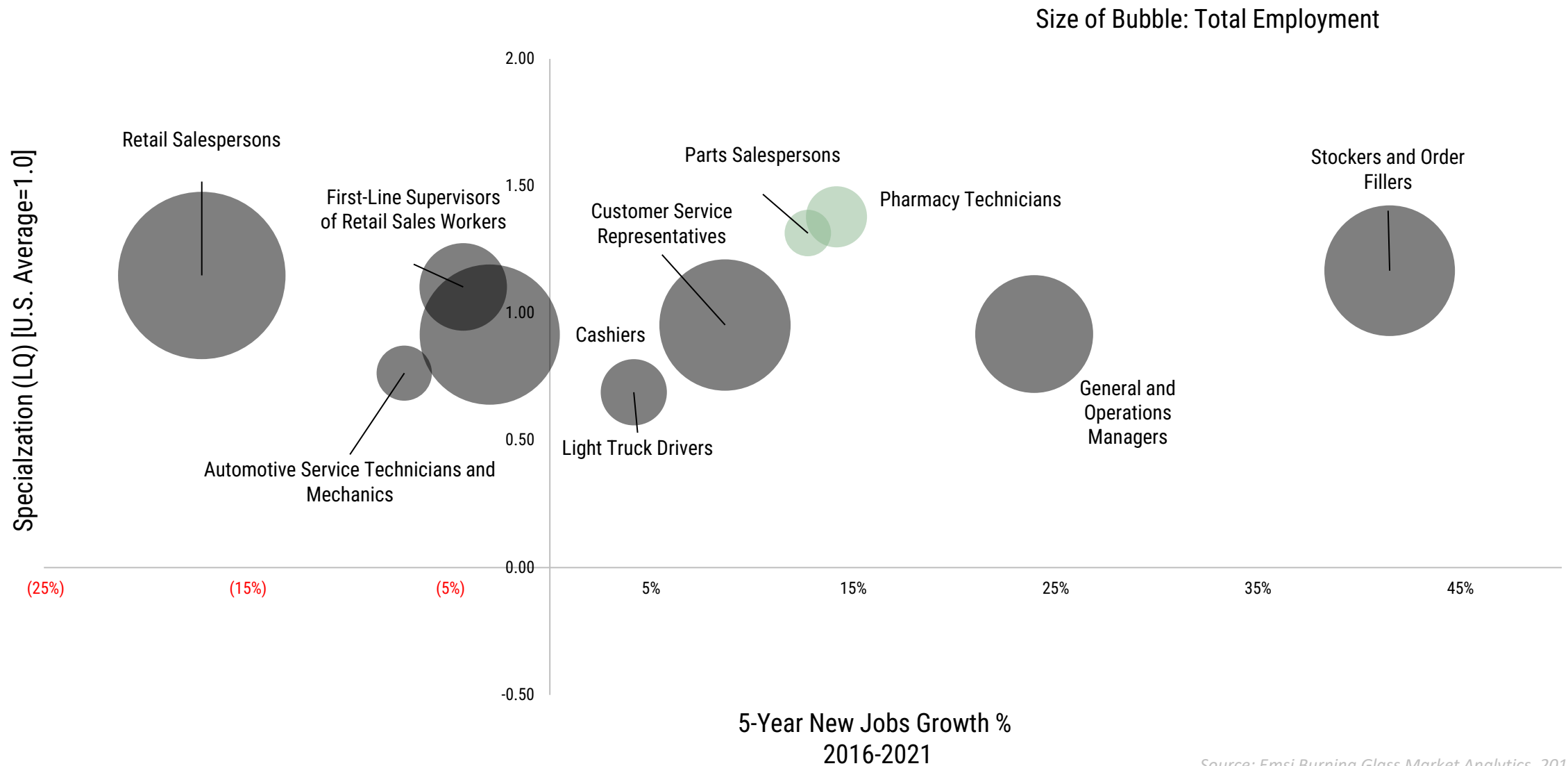
Retail – Cluster Profile (cont'd)

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
451110	Sporting Goods Stores	84	20	31.2%	0.88	\$65,498
445110	Supermarkets and Other Grocery (except Convenience) Stores	804	45	6.0%	0.88	\$36,102
451211	Book Stores	15	(7)	(33.8%)	0.84	\$29,175
451120	Hobby, Toy, and Game Stores	32	(1)	(2.9%)	0.81	\$27,445
445230	Fruit and Vegetable Markets	7	(3)	(30.0%)	0.77	Insf. Data
444120	Paint and Wallpaper Stores	10	0	0.5%	0.74	\$66,009
443141	Household Appliance Stores	11	(0)	(4.0%)	0.72	\$56,177
446191	Food (Health) Supplement Stores	10	3	46.4%	0.69	\$45,334
453910	Pet and Pet Supplies Stores	27	1	3.3%	0.69	\$41,999
441120	Used Car Dealers	32	5	19.6%	0.56	\$73,326
441110	New Car Dealers	200	(23)	(10.2%)	0.54	\$98,842
445310	Beer, Wine, and Liquor Stores	31	11	56.6%	0.53	\$42,628
453220	Gift, Novelty, and Souvenir Stores	17	(8)	(31.8%)	0.43	\$28,227
453110	Florists	7	1	9.0%	0.39	Insf. Data
442299	All Other Home Furnishings Stores	17	(8)	(31.4%)	0.35	\$35,599
444130	Hardware Stores	18	(29)	(61.3%)	0.32	\$49,948

Grey shading shows an industry competitive advantage (LQ>1.25)

Source: Emsi Burning Glass Market Analytics, 2016 & 2021

Retail – Key Occupations



Retail – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
41-2031	Retail Salespersons	1,363	(340)	(20%)	28.3%	\$ 27,635	No formal educational credential	Short-term on-the-job training
41-2011	Cashiers	855	(27)	(3%)	17.7%	\$ 24,271	No formal educational credential	Short-term on-the-job training
53-7065	Stockers and Order Fillers	403	(18)	(4%)	8.4%	\$ 30,927	High school diploma or equivalent	Short-term on-the-job training
41-1011	First-Line Supervisors of Retail Sales Workers	370	(23)	(6%)	7.7%	\$ 45,287	High school diploma or equivalent	None
29-2052	Pharmacy Technicians	129	8	7%	2.7%	\$ 39,242	High school diploma or equivalent	Moderate-term on-the-job training



Furniture

LQ: 3.45

Total Employment: 194

Annual Average Salary: \$72,164

Cluster assets:

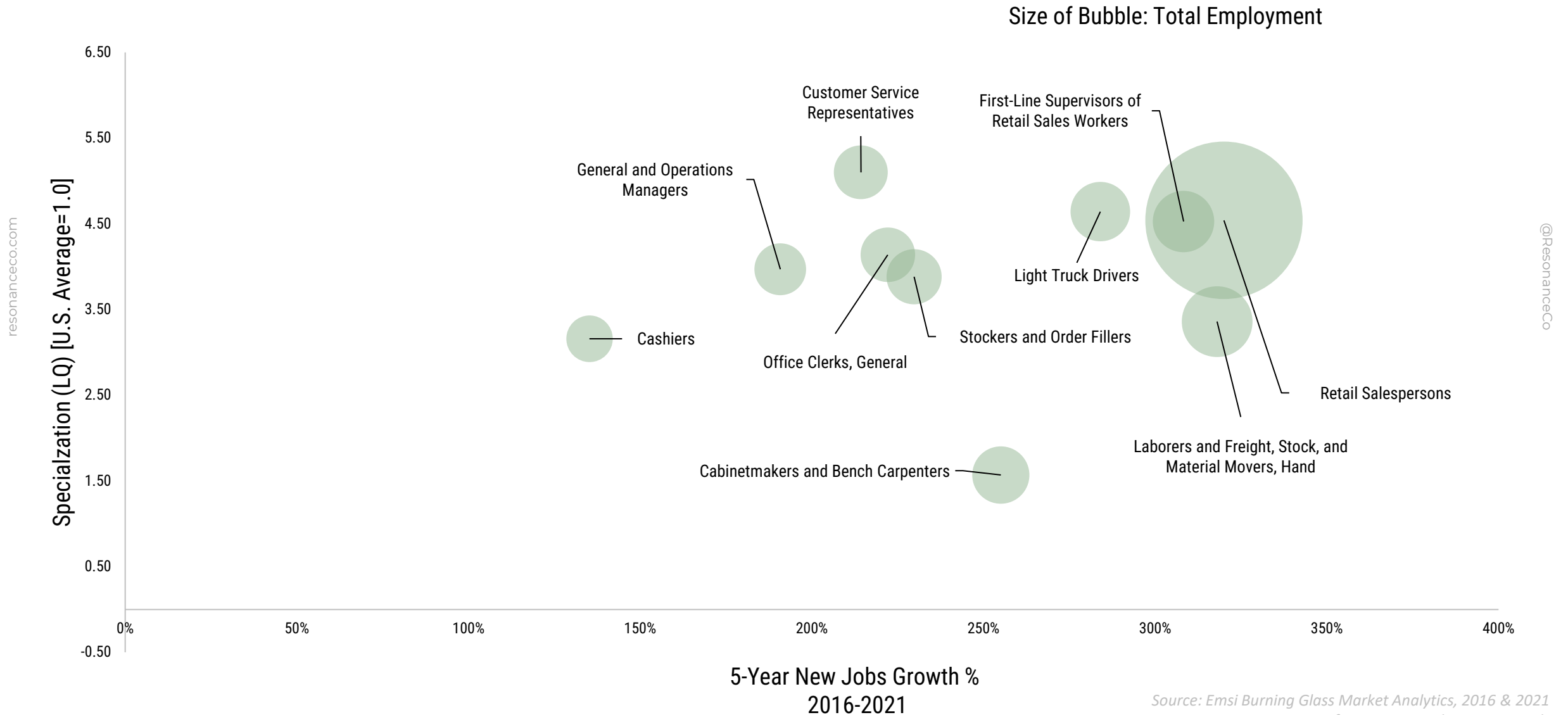
- Fastest-growing cluster
- Ashley Furniture, Elements International, and Steve Silver Co
- 2nd highest share of Hispanic employees
- 2nd lowest share of jobs at risk of automation

Furniture – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		955	742	349.3%	3.45	\$72,164
442110	Furniture Stores	806	670	492.9%	11.10	\$70,387
423210	Furniture Merchant Wholesalers	98	79	410.8%	5.82	\$138,117
337110	Wood Kitchen Cabinet and Countertop Manufacturing	34	2	5.7%	0.82	\$58,716
442299	All Other Home Furnishings Stores	17	(8)	(31.4%)	0.35	\$35,599

Grey shading shows an industry competitive advantage (LQ>1.25)

Furniture – Key Occupations




Furniture – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
41-2031	Retail Salespersons	269	205	320%	28.1%	\$ 27,635	No formal educational credential	Short-term on-the-job training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	54	41	318%	5.7%	\$ 31,791	No formal educational credential	Short-term on-the-job training
41-1011	First-Line Supervisors of Retail Sales Workers	41	31	308%	4.3%	\$ 45,287	High school diploma or equivalent	None
53-3033	Light Truck Drivers	38	28	284%	4.0%	\$ 41,606	High school diploma or equivalent	Short-term on-the-job training
51-7011	Cabinetmakers and Bench Carpenters	36	26	255%	3.7%	\$ 32,669	High school diploma or equivalent	Moderate-term on-the-job training

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Downstream Chemical Products

LQ: 2.51

Total Employment: 200

Annual Average Salary: \$95,887

Cluster assets:

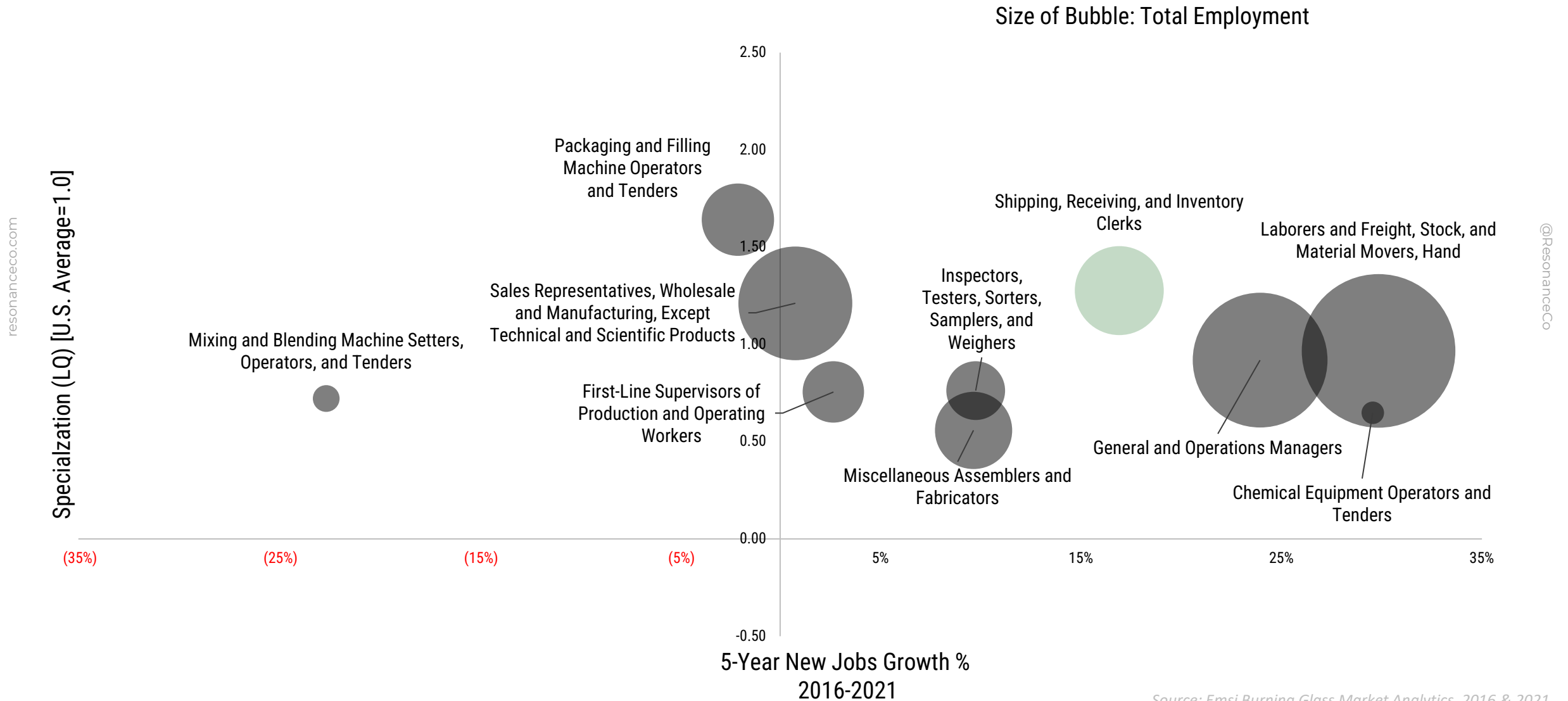
- Specialization in Adhesive Manufacturing: Augura Corporation, Varnish The Cat, H.B. Fuller
- 2nd most productive cluster in terms of GRP per worker
- Highest share of Black workers

Downstream Chemical Products – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		200	32	18.9%	2.51	\$95,887
325520	Adhesive Manufacturing	182	35	23.6%	23.05	\$95,997
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	19	(3)	(12.7%)	1.35	\$94,827

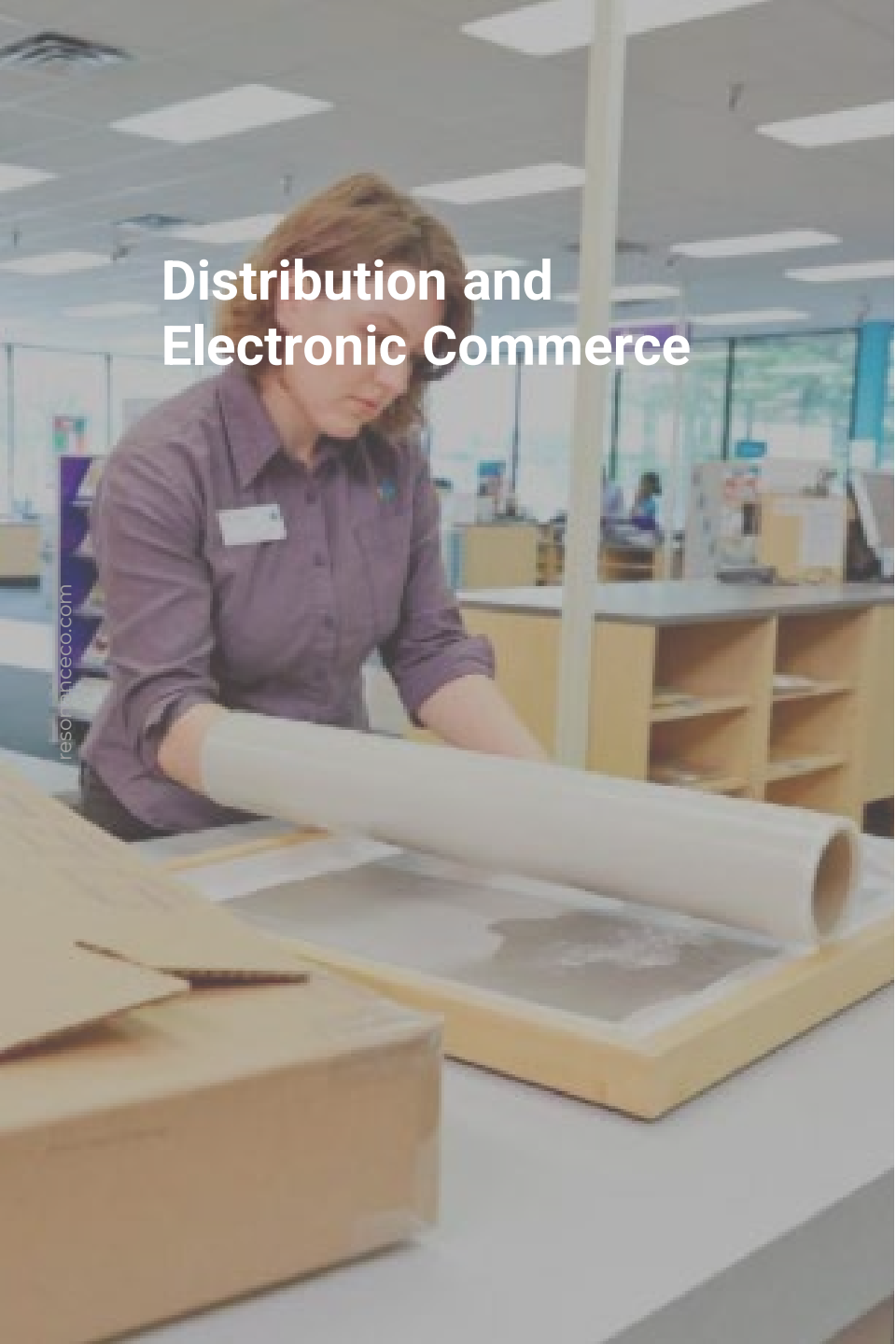
Grey shading shows an industry competitive advantage (LQ>1.25)

Downstream Chemical Products – Key Occupations



Downstream Chemical Products– Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
51-9111	Packaging and Filling Machine Operators and Tenders	22	9	69%	10.9%	\$31,481.56	High school diploma or equivalent	Moderate-term on-the-job training
51-9011	Chemical Equipment Operators and Tenders	17	4	33%	8.3%	\$37,874.81	High school diploma or equivalent	Moderate-term on-the-job training
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	12	(1)	(10%)	6.2%	\$36,336.26	High school diploma or equivalent	Moderate-term on-the-job training
43-5071	Shipping, Receiving, and Inventory Clerks	<10	2	36%	4.0%	\$35,250.20	High school diploma or equivalent	Short-term on-the-job training
51-1011	First-Line Supervisors of Production and Operating Workers	<10	1	10%	4.0%	\$65,396.57	High school diploma or equivalent	None



Distribution and Electronic Commerce

LQ: 1.60

Total Employment: 2,413

Annual Average Salary: \$64,015

Cluster assets:

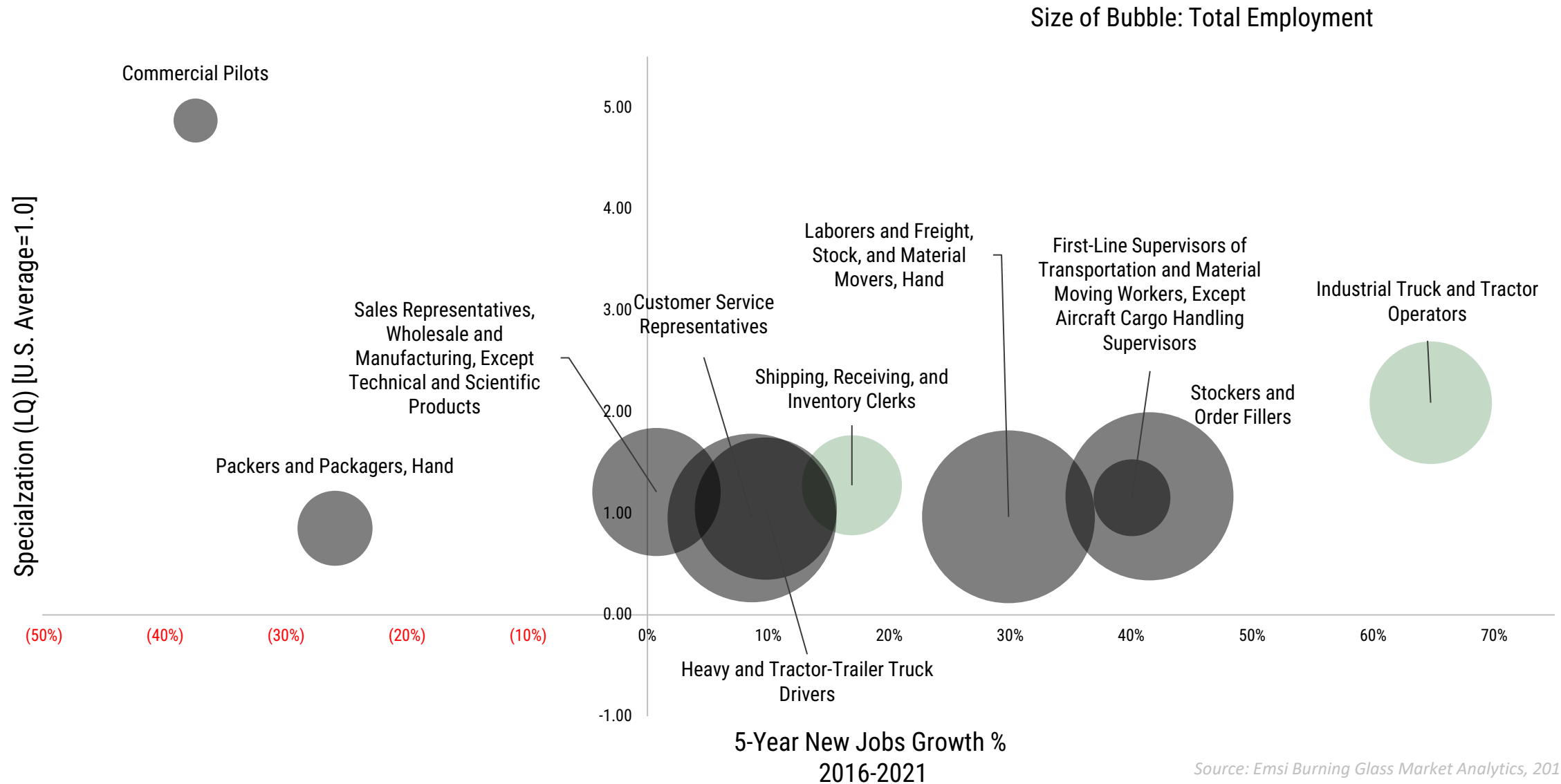
- Location; quick access to every major freeway surrounding the DFW metro and to the US Interstate highway system.
- Mesquite's Union Pacific Railroad Intermodal Hub
- Fastest growing
- 2nd largest employer and 2nd largest contributor to the economy in terms of GRP

Distribution and Electronic Commerce – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		2,413	965	66.6%	1.55	\$64,015
481211	Nonscheduled Chartered Passenger Air Transportation	112	(29)	(20.4%)	10.48	\$147,691
481219	Other Nonscheduled Air Transportation	7	0	0.0%	3.51	Insf. Data
488190	Other Support Activities for Air Transportation	126	11	9.2%	3.17	\$123,279
493110	General Warehousing and Storage	1604	1,032	180.2%	3.12	\$39,817
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing	46	(11)	(18.9%)	2.33	\$56,601
491110	Postal Service	7	0	0.0%	2.27	Insf. Data
425120	Wholesale Trade Agents and Brokers	204	(56)	(21.4%)	1.27	\$158,462
484121	General Freight Trucking, Long-Distance, Truckload	203	24	13.7%	1.14	\$67,992
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	33	(3)	(8.8%)	0.71	\$87,628
488510	Freight Transportation Arrangement	53	15	37.9%	0.65	\$75,545
425110	Business to Business Electronic Markets	7	(5)	(42.8%)	0.61	Insf. Data
561499	All Other Business Support Services	12	(13)	(52.7%)	0.44	\$88,959

Grey shading shows an industry competitive advantage (LQ>1.25)

Distribution and Electronic Commerce – Key Occupations



Distribution and Electronic Commerce – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	331	163	97%	13.7%	\$31,791.49	No formal educational credential	Short-term on-the-job training
53-7065	Stockers and Order Fillers	323	272	542%	13.4%	\$30,926.70	High school diploma or equivalent	Short-term on-the-job training
53-7051	Industrial Truck and Tractor Operators	315	209	196%	13.1%	\$35,246.91	No formal educational credential	Short-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	239	72	43%	9.9%	\$48,588.52	Postsecondary nondegree award	Short-term on-the-job training
43-5071	Shipping, Receiving, and Inventory Clerks	84	36	74%	3.5%	\$35,250.20	High school diploma or equivalent	Short-term on-the-job training



Furniture

LQ: 0.70

Total Employment: 194

Annual Average Salary: \$72,164

Cluster assets:

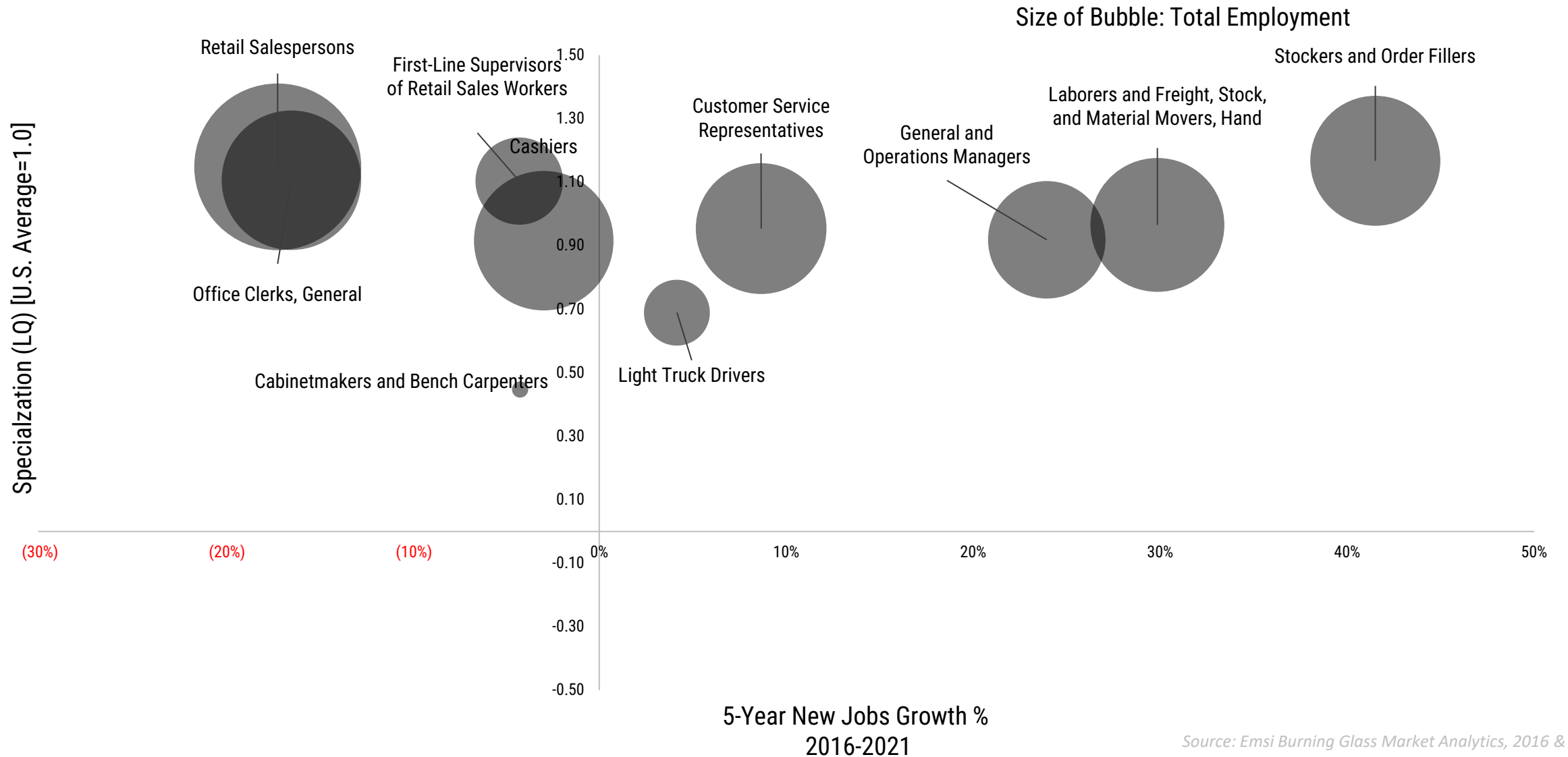
- Elements International, Steve Silver Co, and Ashley Furniture
- 2nd highest share of Hispanic employees
- 2nd lowest share of jobs at risk of automation

Furniture – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		194	(19)	(8.8%)	0.70	\$72,164
442110	Furniture Stores	123	(13)	(9.8%)	1.69	\$70,387
423210	Furniture Merchant Wholesalers	20	1	3.7%	1.18	\$138,117
337110	Wood Kitchen Cabinet and Countertop Manufacturing	34	2	5.7%	0.82	\$58,716
442299	All Other Home Furnishings Stores	17	(8)	(31.4%)	0.35	\$35,599

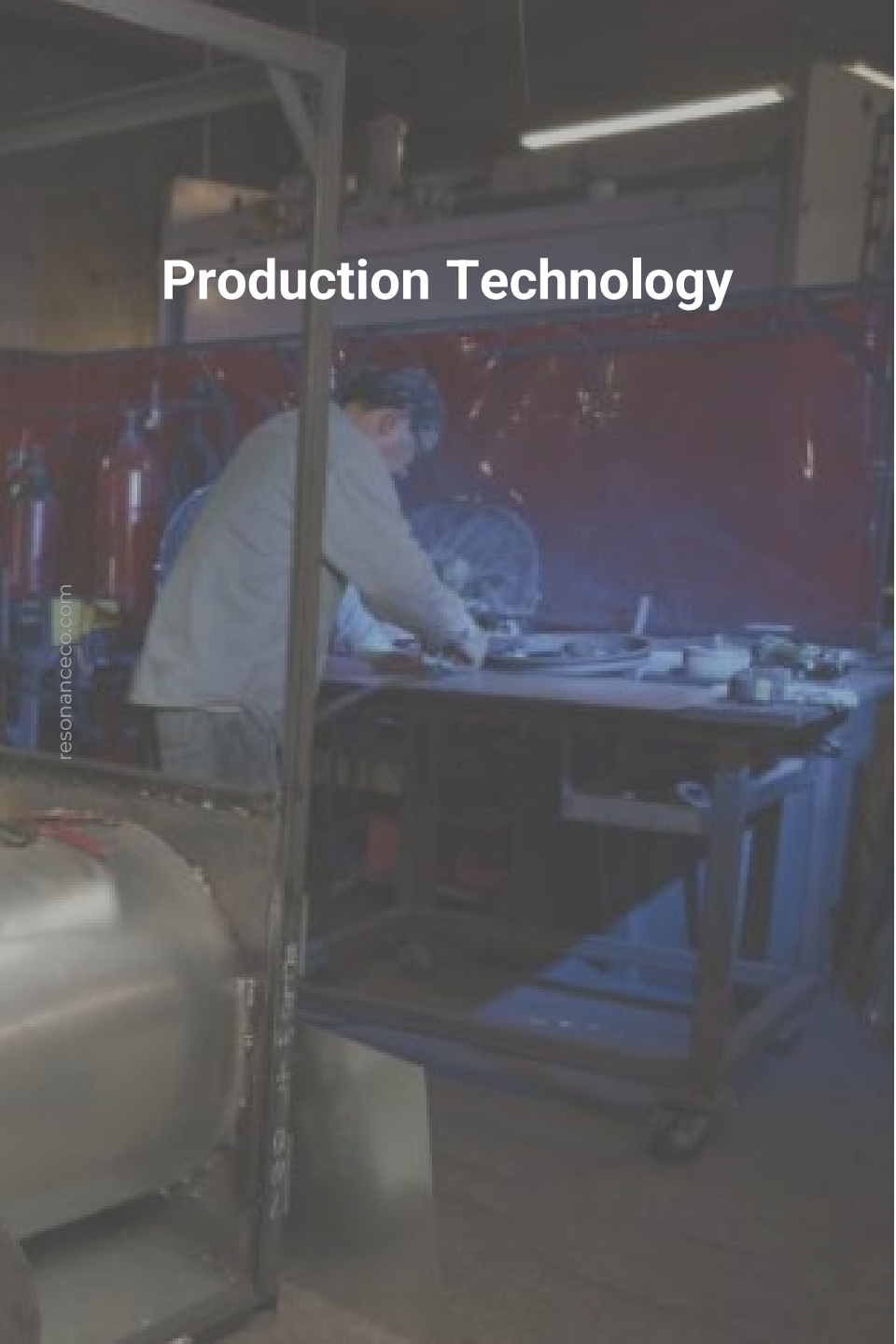
Grey shading shows an industry competitive advantage (LQ>1.25)

Furniture – Key Occupations



Furniture – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
41-2031	Retail Salespersons	55	(10)	(15%)	28.1%	\$ 27,635	No formal educational credential	Short-term on-the-job training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	11	(2)	(17%)	5.7%	\$ 31,791	No formal educational credential	Short-term on-the-job training
41-1011	First-Line Supervisors of Retail Sales Workers	<10	(1)	(6%)	4.3%	\$ 45,287	High school diploma or equivalent	None
53-3033	Light Truck Drivers	<10	(1)	(11%)	4.0%	\$ 41,606	High school diploma or equivalent	Short-term on-the-job training
51-7011	Cabinetmakers and Bench Carpenters	<10	(1)	(12%)	3.7%	\$ 32,669	High school diploma or equivalent	Moderate-term on-the-job training



Production Technology

LQ: 0.47

Total Employment: 138

Annual Average Salary: \$55,979

Cluster assets:

- Competitiveness in industrial process furnace and oven manufacturing
- 2nd highest growth rate
- Highest share of Hispanic employees
- 2nd highest share of employees with a Bachelor's degree

Production Technology – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		138	54	64.0%	0.47	\$55,979
333994	Industrial Process Furnace and Oven Manufacturing	98	44	81.4%	31.35	\$52,457
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	33	11	53.2%	1.04	\$54,848
333999	All Other Miscellaneous General Purpose Machinery Manufacturing	8	(1)	(13.7%)	0.59	Insf. Data

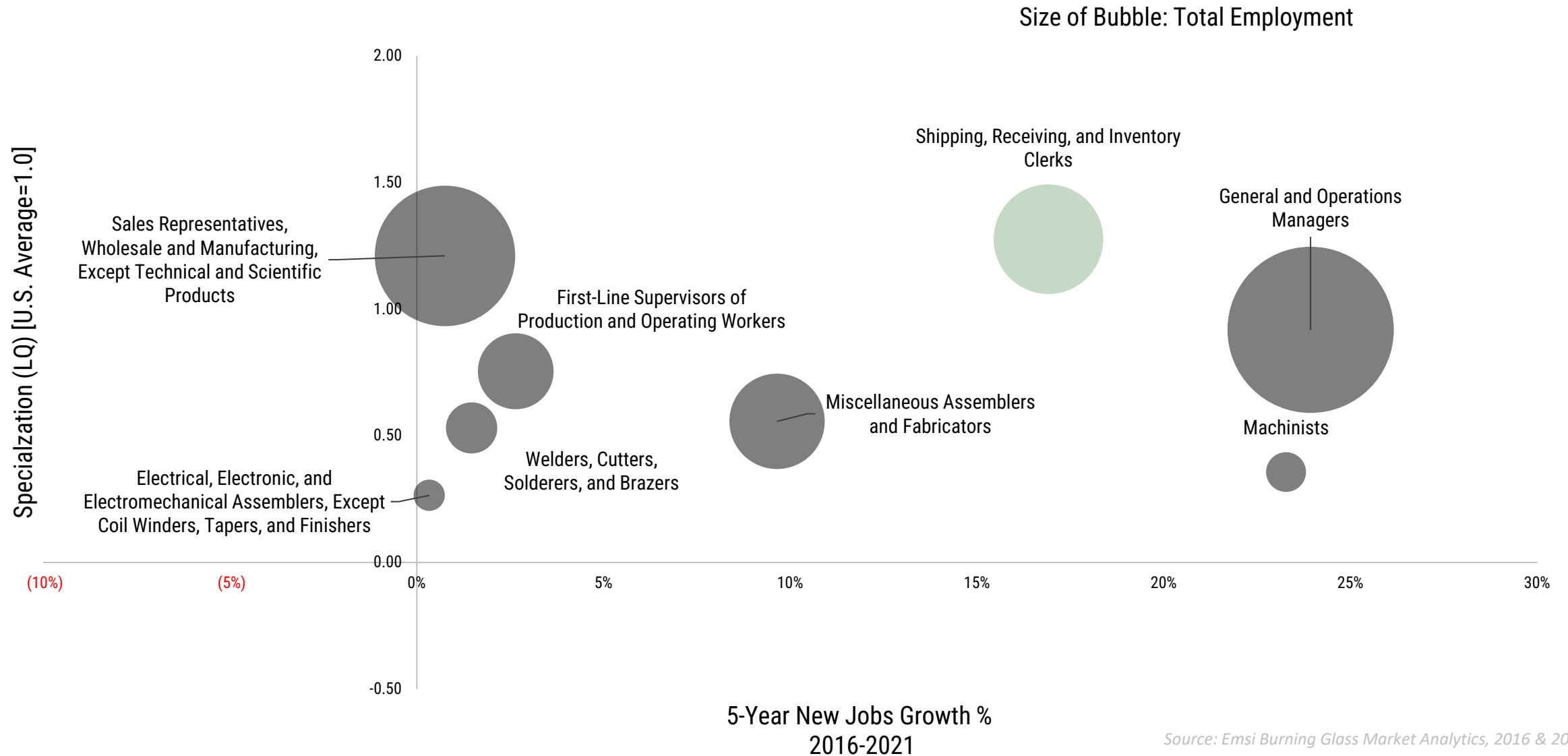
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Grey shading shows an industry competitive advantage (LQ>1.25)

Source: Emsi Burning Glass Market Analytics, 2016 & 2021

Production Technology – Key Occupations



Production Technology– Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
51-2098	Miscellaneous Assemblers and Fabricators	20	7	58%	14.6%	\$ 30,912	High school diploma or equivalent	Moderate-term on-the-job training
51-4121	Welders, Cutters, Solderers, and Brazers	<10	3	48%	6.9%	\$ 43,518	High school diploma or equivalent	Moderate-term on-the-job training
17-2141	Mechanical Engineers	<10	2	90%	3.4%	\$ 96,656	Bachelor's degree	None
51-4041	Machinists	<10	2	67%	3.4%	\$ 45,778	High school diploma or equivalent	Long-term on-the-job training
51-1011	First-Line Supervisors of Production and Operating Workers	<10	2	61%	3.3%	\$ 65,397	High school diploma or equivalent	None

A worker in an orange safety vest and safety glasses is looking at a large digital display in a factory setting. The display shows various data and graphics. The worker is leaning over the display, and their hands are visible on the surface. The background shows industrial equipment and a high ceiling with lights.

Media

LQ: 0.29

Total Employment: 146

Annual Average Salary: \$110,296

Cluster assets:

- Emerging cluster
- Competitiveness in sound recording and design services
- Art Greenhaw Inc, Piano Note1 Productions, Jo Musik Recording Studio, etc.
- B & J Interiors, Jones Sweet Custom Upholstery, Grafic Center, etc.
- Highest productivity in terms of GRP per worker
- Highest earnings
- Most educated workforce
- Lowest share of jobs at risk of automation

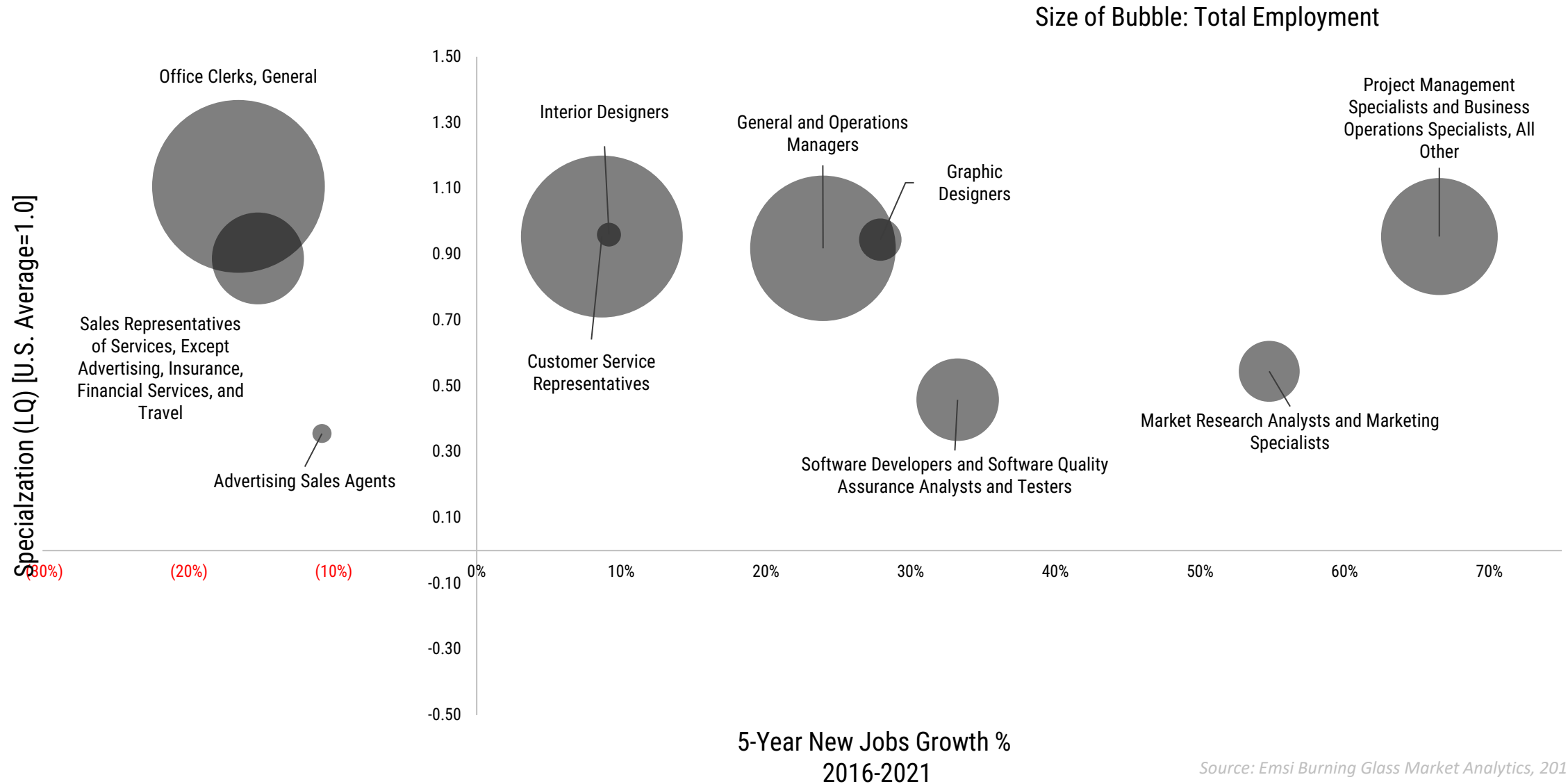
Media – Cluster Profile

NAICS	NAICS Name	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 Location Quotient	Avg. Earnings Per Job
		146	18	14.1%	0.29	\$110,296
512290	Other Sound Recording Industries	10	(5)	(33.6%)	14.00	\$97,198
512240	Sound Recording Studios	7	1	26.2%	3.75	Insf. Data
541430	Graphic Design Services	43	5	14.4%	2.21	\$96,003
541490	Other Specialized Design Services	7	7		1.68	Insf. Data
541420	Industrial Design Services	7	7		1.08	Insf. Data
519190	All Other Information Services	10	4	78.7%	1.07	\$111,601
519130	Internet Publishing and Broadcasting and Web Search Portals	42	15	53.4%	0.40	\$140,388
541810	Advertising Agencies	21	(1)	(3.3%)	0.30	\$117,858

Grey shading shows an industry competitive advantage (LQ>1.25)

Source: Emsi Burning Glass Market Analytics, 2016 & 2021

Media – Key Occupations



Media – Top 5 Occupations

SOC	Description	Employed in Industry Group (2021)	Change (2016 - 2021)	% Change (2016 - 2021)	% of Total Jobs in Industry Group (2021)	Median annual wage	Typical Entry Level Education	Typical On-The-Job Training
27-1024	Graphic Designers	12	2	17%	8.0%	\$ 56,928	Bachelor's degree	None
27-1025	Interior Designers	<10	1	16%	6.3%	\$ 56,006	Bachelor's degree	None
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	<10	0	5%	5.2%	\$ 60,240	High school diploma or equivalent	Moderate-term on-the-job training
11-1021	General and Operations Managers	<10	3	65%	4.4%	\$ 110,923	Bachelor's degree	None
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	<10	(0)	(6%)	4.3%	\$ 112,118	Bachelor's degree	None



Questions and Discussion

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