

SEWARD COUNTY TARGET INDUSTRY STUDY



Program Summary

The Target Industry Analysis identifies a core set of industries that are likely candidates for future retention, expansion, and possible recruitment efforts by the Seward County Chamber and Development Partnership. The study area, chosen based on commuting patterns, includes Butler, Fillmore, Gage, Polk, Saline, Saunders, and York Counties. All data in this report reflects this eight-county region.

This analysis is one of the important steps in the target industry program NPPD developed to support its customer communities.

TOP 5 INDUSTRIES BY EMPLOYMENT

1. Government
2. Manufacturing
3. Health Care & Social Assistance
4. Retail Trade
5. Accommodation & Food Services

FASTEST GROWING INDUSTRIES BY EMPLOYMENT (2016-2021)

1. Mining, Quarrying & Oil & Gas Extraction
2. Other Services
3. Real Estate
4. Arts, Entertainment & Recreation
5. Management of Companies

DECLINING INDUSTRIES BY EMPLOYMENT (2016-2021)

1. Accommodation & Food Services
2. Professional Services
3. Transportation & Warehousing
4. Wholesale Trade
5. Manufacturing

INDUSTRY STRENGTHS BY LOCATION QUOTIENT

1. Agriculture
2. Manufacturing
3. Educational Services
4. Government
5. Wholesale Trade

Note: An employment location quotient greater than one (the national average) indicates an area specializes in an industry.

TOP OCCUPATIONS BY EMPLOYMENT

1. Office & Administrative Support Occupations
2. Professional Services
3. Transportation & Material Moving Occupations
4. Educational Institutional & Library Occupations
5. Sales & Related Occupations

RECOMMENDED INDUSTRY TARGETS

Mature (Mature or Declining) - Strong current presence; Recent national employment decline; Projected future growth (local or national); Above average compensation

Key (Key to Future Growth) - Strong current presence; Strong recent growth (local); Projected future growth (local and national); Above average compensation

Potential (Potential to Drive Future Growth) - Moderate to Strong current presence; recent growth or decline (local or national); projected growth (local or national) or decline (local or national); Above average compensation

Supply Chain- Opportunities for Import Substitution

MATURE INDUSTRY TARGETS

Agriculture

- Support Activities for Crop Production

Manufacturing

- Basic Chemical Manufacturing
- Machine Shops; Turned Product; & Screw, Nut, & Bolt Manufacturing
- Agriculture, Construction, & Mining Machinery Manufacturing
- Motor Vehicle Parts Manufacturing

Wholesale Trade

- Farm Product Raw Material Merchant Wholesalers
- Miscellaneous Nondurable Goods Merchant Wholesalers

Transportation & Warehousing

- Rail Transportation
- Specialized Freight Trucking

KEY INDUSTRY TARGETS

Construction

- Utility System Construction
- Foundation, Structure, & Building Exterior Contractors
- Highway, Street, & Bridge Construction

Manufacturing

- Animal Food Manufacturing
- Architectural and Structural Metals Manufacturing
- Motor Vehicle Body & Trailer Manufacturing

POTENTIAL INDUSTRY TARGETS

Construction

- Nonresidential Building Construction
- Building Equipment Contractors
- Other Specialty Contractors

Manufacturing

- Animal Slaughtering & Processing
- Plastics Product Manufacturing

Wholesale Trade

- Machinery, Equipment, & Supplies Merchants

Transportation & Warehousing

- General Freight Trucking
- Warehousing & Storage

POTENTIAL INDUSTRY TARGETS

Finance & Insurance

- Depository & Credit Intermediation
- Agencies, Brokerages, and Other Insurance Related Activities

Healthcare and Social Assistance

- Offices of Physicians
- Offices of Dentists

SUPPLY CHAIN INDUSTRY TARGETS

Retail Trade

- Automobile Dealers
- Automotive Parts, Accessories, and Tire Stores

Administrative and Support and Waste Management and Remediation Services

- Employment Services
- Services to Buildings and Dwellings

Accommodation and Food Services

- Restaurants and Other Eating Places

Source: Lightcast Q2 2022 Data Set

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Introduction

The purpose of this study is to provide the Seward County Chamber and Development Partnership (SCCDP) with information to be used as part of a process to identify industries for future retention, expansion, and possible recruitment efforts.

This report contains information on the relative sizes and trends, both recent and projected, of area industries and their labor force, plus information on interactions between the Seward County economy and the economies of counties linked to it by commuting patterns. Industries that are key drivers of Seward County's recent economic growth, that are expected to be future drivers of economic growth, and that appear to have the potential to become drivers of the area economy are identified in this study. Also identified are industries that are currently highly important to the area's economic health but may be at risk due to expected declines in overall national employment.

Methodology

U.S. Census Department's Bureau of the Census and Lightcast are the primary sources of information for this study. Lightcast, a private data vendor, collects and analyzes data from a variety of public and private sources such as the U.S. Census Department, the U.S. Department of Labor, and the U.S. Department of Education. Lightcast uses this information to derive estimates of local data suppressed by government agencies to protect proprietary information. Data from Lightcast enables a level of analysis that would not be possible in many Nebraska counties due to high levels of data suppression common in areas of relatively small populations. Nebraska Public Power District (NPPD) subscribes to Lightcast data services and provides this information to wholesale and retail customers as part of its economic development services to these communities.

Data from the U.S. Census Bureau's OnTheMap Application is used to identify counties closely linked to Seward County based on proximity and commuting patterns. Two adjacent counties were selected for analysis. OnTheMap data for Seward and the seven adjacent counties is reported in this study.

Analysis of area industries, workforces, and labor forces indicated the counties could be combined in a single area, the 2022 Seward County Study Area. For this study, data are generally reported for the 2022 Seward County Study Area.

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages are reported for the 2022 Seward County Area. This information is used to identify the relative strengths and importance of existing industries and occupations.

Industry targets were divided into 3 categories based on their LQ, recent growth, projected future growth, and a minimum compensation level.

Mature (Mature or Declining) – Strong current presence; National employment decline; Projected future growth either local or national, Above average compensation.

Key (Key to Future Growth) – Strong current presence; Strong recent growth (local); Projected future growth (local and national), Above average compensation.

Potential (Potential to Drive Future Growth) – Moderate to Strong current presence; recent growth or decline, projected growth (local or national) or decline (local or national), Above average compensation.

Lastly, sales to Key industries and to industries identified as having the potential to become Key industries (Potential industries) by businesses outside the study area are compared to purchases from similar local businesses. This supply chain analysis identifies possible opportunities for local input substitution.

Study Area Identification

The geographic area selected for this study is based upon commuting data from the U.S. Census Bureau's OnTheMap Application. The Seward County Study Area consists of Seward County plus Butler, Fillmore, Gage, Polk, Saline, Saunders, and York Counties. Although Lancaster County neighbors Seward County and is a major work destination for Seward County workers, for the target industry analysis it was not included. It was not included because after preliminary analysis, where Lancaster County was included, the results were skewed toward Lancaster County due to its larger number of business establishments and employees.

Figure One
Study Area



Study Area – Workforce

While data about an area’s labor force describe the characteristics of residents, analysis of an area’s workforce provides information about workers at local businesses, regardless of where they live. Analysis of workforce data provides insights into the types of businesses that have been and are likely to be successful within a region. Table Four below provides information on the relative size as measured by 2nd Quarter 2022 employment, compensation paid, and the most recent five-year change in employment for very broad categories of Seward County businesses.

As shown in Table One below, **NAICS 90, Government, with 9,565 workers, is the largest 2-digit, NAICS industry in the 2022 Seward County Study Area. This sector has experienced a decrease in jobs during the latest five-years, and has average annual wages, \$42,123, which are slightly lower than the regional average of \$43,310. NAICS 31, Manufacturing, with 7,053 workers, is the second largest 2-digit, NAICS industry in the 2022 Seward County Study Area, has average annual wages, \$57,531, higher than the regional average, and has recently experienced a decline in workers. NAICS 22, Utilities, has the highest average annual wages, \$137,758, and the lowest, 26, number of jobs.**

Table One
2022 Seward County Study Area Workforce (Local Jobs) Employment
Average Wages and 5-Year Job Change by Industry
Preliminary Data, 2022 Q2

NAICS	Jobs	Avg Ann Wages (\$)	5-Year Change	
			Jobs	Annual, Percent
NAICS 90 Government	9,565	42,123	-483	-4.8%
NAICS 31 Manufacturing	7,053	57,531	-541	-7.1%
NAICS 62 Health Care and Social Assistance	4,836	41,773	-316	-6.1%
NAICS 44 Retail Trade	4,408	28,564	95	2.2%
NAICS 72 Accommodation and Food Services	2,391	14,994	-309	-11.4%
NAICS 23 Construction	2,185	49,603	-32	-1.4%
NAICS 81 Other Services (except Public Administration)	2,096	24,533	246	13.3%
NAICS 11 Agriculture, Forestry, Fishing and Hunting	2,068	39,804	-92	-4.3%
NAICS 42 Wholesale Trade	1,914	62,715	-148	-7.2%
NAICS 48 Transportation and Warehousing	1,661	69,965	-161	-8.8%
NAICS 61 Educational Services	1,658	24,559	-63	-3.7%
NAICS 52 Finance and Insurance	1,546	60,994	41	2.7%
NAICS 56 Administrative and Support and Waste Management and Remediation Services	1,001	42,220	-53	-5.0%
NAICS 54 Professional, Scientific, and Technical Services	684	58,109	-76	-10.0%
NAICS 71 Arts, Entertainment, and Recreation	415	14,112	26	6.7%
NAICS 51 Information	260	58,060	-12	-4.4%
NAICS 53 Real Estate and Rental and Leasing	141	36,970	11	8.4%
NAICS 55 Management of Companies and Enterprises	133	68,063	4	3.1%
NAICS 21 Mining, Quarrying, and Oil and Gas Extraction	58	57,555	22	61.3%
NAICS 22 Utilities	26	137,758	-2	-7.0%
Total All Industries	44,100	43,310	-1,844	-4.0%

Source: Lightcast Q2 2022 Data Set

Table Two below provides a comparison of employment distributions at the 2-digit NAICS level for industries in the 2022 Seward County Study Area and Nebraska. The largest differences occur within the NAICS 90, Government Sector, Seward County Study Area's, 21.7 percent vs. Nebraska's 17.6 percent.

Table Two
2022 Seward County Study Area
and Nebraska Workforce Employment
Total and Percent Distribution, Preliminary Data, 2022 Q2

NAICS	Jobs		Percent All Jobs	
	Seward County Study Area	Nebraska	Seward County Study Area	Nebraska
NAICS 90 Government	9,565	183,377	21.7%	17.6%
NAICS 31 Manufacturing	7,053	99,007	16.0%	9.5%
NAICS 62 Health Care and Social Assistance	4,836	128,806	11.0%	12.4%
NAICS 44 Retail Trade	4,408	104,782	10.0%	10.1%
NAICS 72 Accommodation and Food Services	2,391	71,866	5.4%	6.9%
NAICS 23 Construction	2,185	57,070	5.0%	5.5%
NAICS 81 Other Services (except Public Administration)	2,096	42,349	4.8%	4.1%
NAICS 11 Agriculture, Forestry, Fishing and Hunting	2,068	21,481	4.7%	2.1%
NAICS 42 Wholesale Trade	1,914	39,686	4.3%	3.8%
NAICS 48 Transportation and Warehousing	1,661	51,908	3.8%	5.0%
NAICS 61 Educational Services	1,658	19,787	3.8%	1.9%
NAICS 52 Finance and Insurance	1,546	58,767	3.5%	5.6%
NAICS 56 Administrative and Support and Waste Management and Remediation Services	1,001	49,643	2.3%	4.8%
NAICS 54 Professional, Scientific, and Technical Services	684	47,973	1.6%	4.6%
NAICS 71 Arts, Entertainment, and Recreation	415	13,333	0.9%	1.3%
NAICS 51 Information	260	17,236	0.6%	1.7%
NAICS 53 Real Estate and Rental and Leasing	141	10,801	0.3%	1.0%
NAICS 55 Management of Companies and Enterprises	133	20,289	0.3%	2.0%
NAICS 21 Mining, Quarrying, and Oil and Gas Extraction	58	996	0.1%	0.1%
NAICS 22 Utilities	26	998	0.1%	0.1%

Source: Lightcase Q2 2022 Data

Major Occupations and Wages

The composition of occupations, including associated skill levels, employed within a region is determined by the mix of existing industries. An analysis of average area compensation relative to national averages provides information on the relative skill levels and the attractiveness of an area for retention and growth of industries dependent upon specific skills.

Table Three
Seward County Study Area Workforce (Local Jobs) and
Labor Force (Resident Jobs) Net In-Commuters, Average Wages and
Average Wages as Percent US Average, Preliminary Data, 2022 Q2

Standard Occupational Code	Local Jobs	Residents Working in Occupation	Net In-Commuters	Mean Hourly Wage (\$)	Mean Hourly Wage as Percent US
43-0000 Office and Administrative Support Occupations	5,064	7,606	-2,511	\$17.38	85.3%
51-0000 Production Occupations	4,483	4,690	-234	\$20.62	102.6%
53-0000 Transportation and Material Moving Occupations	4,218	6,143	-1,946	\$19.50	100.5%
25-0000 Educational Instruction and Library Occupations	3,775	5,113	-1,340	\$26.26	89.9%
41-0000 Sales and Related Occupations	3,680	5,326	-1,653	\$18.24	82.3%
35-0000 Food Preparation and Serving Related Occupations	2,852	4,019	-1,228	\$11.54	86.7%
11-0000 Management Occupations	2,282	3,087	-827	\$42.75	71.4%
29-0000 Healthcare Practitioners and Technical Occupations	2,231	3,122	-908	\$33.73	81.5%
47-0000 Construction and Extraction Occupations	2,205	2,683	-522	\$20.81	80.2%
49-0000 Installation, Maintenance, and Repair Occupations	2,204	2,685	-490	\$22.61	89.5%
31-0000 Healthcare Support Occupations	2,017	2,496	-496	\$14.48	93.9%
37-0000 Building and Grounds Cleaning and Maintenance Occupations	1,517	1,970	-454	\$14.69	94.0%
45-0000 Farming, Fishing, and Forestry Occupations	1,473	1,450	17	\$15.46	103.1%
13-0000 Business and Financial Operations Occupations	1,323	2,300	-976	\$30.50	78.7%
39-0000 Personal Care and Service Occupations	898	1,295	-409	\$13.29	86.4%
21-0000 Community and Social Service Occupations	868	1,133	-282	\$21.26	84.5%
33-0000 Protective Service Occupations	787	991	-221	\$22.36	88.6%
15-0000 Computer and Mathematical Occupations	484	1,042	-564	\$34.76	74.8%
27-0000 Arts, Design, Entertainment, Sports, and Media Occupations	426	508	-84	\$21.09	67.4%
17-0000 Architecture and Engineering Occupations	399	468	-79	\$37.61	86.5%
19-0000 Life, Physical, and Social Science Occupations	374	416	-46	\$31.12	81.6%
23-0000 Legal Occupations	149	219	-73	\$40.18	74.5%
Total	43,890	59,092	-15,473	\$21.80	80.7%

Source: Lightcast Q2 2022 Data Set

As shown in Table Three on the previous page, the largest 2-digit, standard occupational code (SOC) category when measured by jobs within the 2022 Seward County Study Area, is SOC 43-0000 Office and Administrative Support Occupations, employing 5,064 workers. The next-largest occupation groups in the region are SOC 51-0000 Production Occupations (4,483), SOC 53-0000 Transportation and Material Moving Occupations (4,218), SOC 25-0000 Educational instruction and Library Occupations (3,775), and SOC 41-0000 Sales and Related Occupations (3,680).

Among the top five occupations, none of them have an average annual local wage greater than the 2022 Seward County Study Area average of \$21.80.

Analysis of Potential Targets

As noted in previous sections of this study, the 2-digit NAICS industries NAICS 90, Government, NAICS 62, Health Care and Social Assistance, NAICS 44, Retail Trade, NAICS 72, Accommodation and Food Services and NAICS 11, Agriculture, Forestry, Fishing, and Hunting make up a large portion of the Seward County Study Area economy when measured by employment.

Information in this section provides a more detailed analysis of 2022 Seward County Study Area industries at the 4-digit NAICS levels. This information is used to assess the suitability of individual industries as potential targets for retention, expansion, and recruitment efforts.

Excluded from this analysis are industries whose development is usually highly dependent on local population growth. These include Government, Utilities, and the Real Estate and Rental and Leasing industry. The Accommodation and Food Service and Retail Trade industries are excluded due to low average wages. Construction industries are usually excluded from further analysis; however, because of the importance of this industry to local growth, it was retained for further analysis. Additionally, only industries with average annual total earnings (wages and benefits) of at least \$43,000, just above average for Seward County, are included.

Location Quotient (LQ) Analysis

In this section, LQ analysis is used to identify study area industries that have performed better than the national average. Superior performance by area industries often indicates the presence of substantial competitive advantages or regional strengths. These advantages and/or strengths, such as access to skilled labor or specialized resources, are critical to an industry and provide a rationale for a region's expected future growth.

LQs indicate whether the percentage of total employment¹ by an area industry is greater than the national average ($LQ > 1$), is equal to the national average ($LQ = 1$) or is less than the national average ($LQ < 1$). An $LQ > 1$ often indicates the presence of a comparative advantage within a region.

As shown in Table Five on the following page in the Seward County Study Area, NAICS 11, Agriculture, Forestry, Fishing, and Hunting, 4.80; NAICS 31, Manufacturing, 1.97; followed by NAICS 61, Educational Services, 1.44; NAICS 90, Government, 1.37; and NAICS 42, Wholesale Trade, 1.15 have the highest location quotients by total employment.

¹ In addition to employment, location quotients can be calculated for other factors, such as total sales and taxes. For this report LQs are reported for employment only.

Of the five NAICS with the largest LQs, two (NAICS 31, Manufacturing and NAICS 90, Government) have average wages exceeding the regional average of \$43,310 and employ more than 1,000 workers.

Table Five
Seward County Study Area Workforce Employment (Local Jobs),
Average Wages and Change in Job Last 5 Years by Industry and LQs
2-Digit NAICS Industries, Preliminary Data, 2022 Q2

NAICS Industry	Jobs	Wages (\$)	Change in Jobs 2016 to 2021	LQ
NAICS 11 Agriculture, Forestry, Fishing and Hunting	2,068	39,804	-92	4.80
NAICS 21 Mining, Quarrying, and Oil and Gas Extraction	58	57,555	22	0.39
NAICS 22 Utilities	26	137,758	-2	0.16
NAICS 23 Construction	2,185	49,603	-32	0.99
NAICS 31 Manufacturing	7,053	57,531	-541	1.97
NAICS 42 Wholesale Trade	1,914	62,715	-148	1.15
NAICS 44 Retail Trade	4,408	28,564	95	0.98
NAICS 48 Transportation and Warehousing	1,661	69,965	-161	0.92
NAICS 51 Information	260	58,060	-12	0.32
NAICS 52 Finance and Insurance	1,546	60,994	41	0.80
NAICS 53 Real Estate and Rental and Leasing	141	36,970	11	0.21
NAICS 54 Professional, Scientific, and Technical Services	684	58,109	-76	0.24
NAICS 55 Management of Companies and Enterprises	133	68,063	4	0.19
NAICS 56 Administrative and Support and Waste Management and Remediation Services	1,001	42,220	-53	0.38
NAICS 61 Educational Services	1,658	24,559	-63	1.44
NAICS 62 Health Care and Social Assistance	4,836	41,773	-316	0.82
NAICS 71 Arts, Entertainment, and Recreation	415	14,112	26	0.74
NAICS 72 Accommodation and Food Services	2,391	14,994	-309	0.69
NAICS 81 Other Services (except Public Administration)	2,096	24,533	246	1.08
NAICS 90 Government	9,565	42,123	-483	1.37
Total All Industries	44,100	43,310	-1,844	

Source: Lightcast Q2 2022 Data Set

The information in Table Five shows industries in NAICS 11, Agriculture, Forestry, Fishing, and Hunting; NAICS 31, Manufacturing, and NAICS 61, Educational Services have been major drivers of the Seward County Study Area's economy by location quotient.

Table Six , next page, provides employment, wage, employment growth and LQ information for 24, 4-digit NAIC industries², with average 2021 employment of 100 or more workers, average wages greater than \$43,000, and LQs greater than 1.1 for the Seward County Study Area. These more narrowly defined industries are sub-sectors of the 2-digit industries in Table Five.

² Does not include industries in NAICS 92 Public Administration.

Table Six
Seward County Study Area Workforce Employment (Local Jobs),
Average Wages and Change in Job Last 5 Years by Industry and LQs,
Select* 4-Digit NAICS Industries, Preliminary Data, 2022 Q2

Industry	Jobs	Wages (\$)	Change in Jobs 2016 to 2021	LQ
NAICS 1151 Support Activities for Crop Production	673	\$47,887	-233	4.88
NAICS 2371 Utility System Construction	212	\$60,980	-43	1.31
NAICS 2373 Highway, Street, and Bridge Construction	208	\$54,611	30	2.02
NAICS 2381 Foundation, Structure, and Building Exterior Contractors	430	\$50,892	-26	1.55
NAICS 3111 Animal Food Manufacturing	818	\$62,122	-78	41.54
NAICS 3116 Animal Slaughtering and Processing	1,987	\$53,124	-121	12.97
NAICS 3251 Basic Chemical Manufacturing	331	\$74,955	-32	7.69
NAICS 3261 Plastics Product Manufacturing	186	\$53,193	10	1.08
NAICS 3323 Architectural and Structural Metals Manufacturing	478	\$69,150	118	4.26
NAICS 3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	171	\$44,633	-13	1.79
NAICS 3331 Agriculture, Construction, and Mining Machinery Manufacturing	445	\$57,943	-49	7.81
NAICS 3362 Motor Vehicle Body and Trailer Manufacturing	181	\$54,685	52	3.88
NAICS 3363 Motor Vehicle Parts Manufacturing	874	\$59,451	-368	5.52
NAICS 4238 Machinery, Equipment, and Supplies Merchant Wholesalers	577	\$64,961	-84	2.87
NAICS 4245 Farm Product Raw Material Merchant Wholesalers	493	\$53,258	-70	24.76
NAICS 4249 Miscellaneous Nondurable Goods Merchant Wholesalers	424	\$72,570	-57	4.57
NAICS 4821 Rail Transportation	487	\$119,072	-68	7.65
NAICS 4841 General Freight Trucking	343	\$51,307	-69	1.10
NAICS 4842 Specialized Freight Trucking	415	\$54,076	5	3.11

* Industries other than NAICS 92 Public Administration and NAICS 90 Government Enterprises with average wages greater than \$43,000, employment greater than 100, and LQ greater than 1.10.

Source: Lightcast Q2 2022 Data Set

Shift Share Analysis

Further analysis and refinement of the study area industries is accomplished using shift share analysis. Shift share analysis decomposes actual or projected changes in a local industry's employment into three components. These are the:

National effect: the local industry's starting employment multiplied by the percent change in national average employment for all industries—this shows the change in local employment attributable to the change in economy-wide employment;

Industry effect: the local industry's starting employment multiplied by the percent change in national employment for the industry minus the national effect—this shows the change in local employment attributable to an industry's employment trends after adjusting for national employment trends; and

Competitive effect: the difference between a local industry's ending and starting employment minus the national effect and the industry effect—this is an indication of the change in local employment attributable to an area's relative advantage or competitiveness.

The following is an example of a shift share decomposition:

1. Local Industry A grows by 10.0 percent from 1,000 to 1,100.
2. The average of all industry employment change in the U.S. is a 3.0 percent increase; the national effect is 30 or 1,000 times .03.
3. Average U.S. growth for Industry A is 5.0 percent.
4. The industry effect is .05 (5.0 percent) times 1,000 minus the national effect of 30; this is 50 minus 30 and the industry effect equals 20.
5. The competitive effect is 100 minus 30, the national effect, minus 20, the industry effect, and is equal to 50 or 5.0 percent. The industry has grown twice as fast as the average of similar industries across the U.S.

If a local industry's employment changes by the same percentage as the U.S. average for that industry, 5.0 percent in the above example, the competitive effect is zero. The change in employment for a US industry is also referred to as the **expected effect** for a local industry.

If the competitive effect is very strong, a local industry can grow when the national and industry effects are both negative. Likewise, if a national industry is experiencing strong growth, the expected effect can be positive when the national effect is negative. Industries with positive industry and local competitive shift share effects are either key drivers or are likely to become key drivers of the local economy.

The criteria used to evaluate 4-digit NAICS industries are shown, below, in Table Seven. Potential Targets were divided into 3 categories based on their LQ, recent growth, projected future growth, and a minimum compensation level.

Mature (Mature or Declining) – Strong current presence; National employment decline; Projected future growth either local or national, Above average compensation.

Key (Key to Future Growth) – Strong current presence; Strong recent growth (local); Projected future growth (national), Above average compensation.

Potential (Potential to Drive Future Growth) – Moderate to Strong current presence; Recent growth or decline (local or national), Projected growth (local or national) or projected decline (local or national), Above average compensation.

Table Seven
Initial Classification of Industries by Potential to Drive Local Growth

Category	LQ	Recent Growth	Projected Growth	Compensation
Mature (Mature or Declining)	1+	+/-	+/-	>\$43,000
Key (Key to Future Growth)	1+	+	+	>\$43,000
Potential (Potential to Drive Future Growth)	>1/<1	+/-	+/-	>\$43,000

Source: Melissa Trueblood, PhD, Economist, Nebraska Public Power District.

Table Eight A, on the following pages, contains information on employment, average annual wage, LQ, plus recent and forecast employment growth for 27 industry targets. These 27 possible industry targets are recommended for further examination and evaluation for future expansion and retention efforts.

Table Eight
Mature, Key, & Potential Target Industries
2022 Seward County Study Area

Workforce, Average Wages, LQ, Job Growth 2016-2021 & Forecast Job Growth 2021-2026, Preliminary Data, 2022 Q2

NAICS & Industry	Jobs	Wages (\$)	LQ	2016 – 2021		2021 – 2026	
				Job Change	Competitive Effect	Job Change	Competitive Effect
Mature							
Agriculture, Forestry, Fishing & Hunting							
NAICS 1151 Support Activities for Crop Production	673	\$47,887	4.88	-233	-219	-21	-68
Manufacturing							
NAICS 3251 Basic Chemical Manufacturing	331	\$74,955	7.69	-32	-28	2	-4
NAICS 3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	171	\$44,633	1.79	-13	0	38	39
NAICS 3331 Agriculture, Construction, and Mining Machinery Manufacturing	445	\$57,943	7.81	-49	-21	35	51
NAICS 3363 Motor Vehicle Parts Manufacturing	874	\$59,451	5.52	-368	-282	-59	-72
Wholesale Trade							
NAICS 4245 Farm Product Raw Material Merchant Wholesalers	493	\$53,258	24.76	-70	-27	-46	-42
NAICS 4249 Miscellaneous Nondurable Goods Merchant Wholesalers	424	\$72,570	4.57	-57	-49	-4	2
Transportation & Warehousing							
NAICS 4821 Rail Transportation	487	\$119,072	7.65	-68	14	17	23
NAICS 4842 Specialized Freight Trucking	415	\$54,076	3.11	5	7	13	7

Table Eight Continued
Mature, Key, & Potential Target Industries
2022 Seward County Study Area
Employment, Average Wages, LQ, Job Growth 2016-2021 &
Forecast Job Growth 2021-2026, Preliminary Data, 2022 Q2

NAICS & Industry	Jobs	Wages (\$)	LQ	2016 - 2021		2021 - 2026	
				Job Change	Competitive Effect	Job Change	Competitive Effect
Key Target Industries							
Construction							
NAICS 2371 Utility System Construction	212	\$60,980	1.31	-43	-73	6	-3
NAICS 2373 Highway, Street, and Bridge Construction	208	\$54,611	2.02	30	15	17	11
NAICS 2381 Foundation, Structure, and Building Exterior Contractors	430	\$50,892	1.55	-26	-68	10	-3
Manufacturing							
NAICS 3111 Animal Food Manufacturing	818	\$62,122	41.54	-78	-209	17	-48
NAICS 3323 Architectural and Structural Metals Manufacturing	478	\$69,150	4.26	118	104	97	81
NAICS 3362 Motor Vehicle Body and Trailer Manufacturing	181	\$54,685	3.88	52	45	-18	-22

Table Eight Continued
Mature, Key, & Potential Target Industries
2022 Seward County Study Area
Employment, Average Wages, LQ, Job Growth 2016-2021 &
Forecast Job Growth 2021-2026, Preliminary Data, 2022 Q2

NAICS & Industry	Jobs	Wages (\$)	LQ	2016 - 2021		2021 - 2026	
				Job Change	Competitive Effect	Job Change	Competitive Effect
Potential Target Industries							
Construction							
NAICS 2362 Nonresidential Building Construction	197	\$50,438	0.84	12	9	16	12
NAICS 2382 Building Equipment Contractors	593	\$46,996	0.88	34	-33	7	-15
NAICS 2389 Other Specialty Trade Contractors	180	\$46,339	0.86	-23	-46	-12	-18
Manufacturing							
NAICS 3116 Animal Slaughtering and Processing	1,987	\$53,124	12.97	-121	-236	-153	-195
NAICS 3261 Plastics Product Manufacturing	186	\$53,193	1.08	10	5	-3	-1
Wholesale Trade							
NAICS 4238 Machinery, Equipment, and Supplies Merchant Wholesalers	577	\$64,961	2.87	-84	-105	-45	-53
Transportation & Warehousing							
NAICS 4841 General Freight Trucking	343	\$51,307	1.10	-69	-89	-41	-51
NAICS 4931 Warehousing and Storage	230	\$46,224	0.48	-57	-277	-15	-47
Finance & Insurance							
NAICS 5221 Depository Credit Intermediation	968	\$56,164	1.89	-29	-63	-88	-60
NAICS 5242 Agencies, Brokerages, and Other Insurance Related Activities	395	\$68,271	0.85	53	-9	15	-14
Healthcare and Social Assistance							
NAICS 6211 Offices of Physicians	282	\$83,273	0.36	-17	-39	4	-12
NAICS 6212 Offices of Dentists	228	\$50,730	0.79	58	48	33	21

Source: Values calculated by Melissa L. Trueblood, Ph.D., Economist, Nebraska Public Power District from data in Lightcast Q2 2022 Data Set

Supply Chain Opportunities

Table Nine below contains information on six, local area, 4-Digit NAICS industries currently supplying a large portion of the total inputs purchased locally by industries in Tables Eight. These industries may be able to increase their sales to Key, Mature, and Potential area industries and may also be considered potential targets for retention, expansion, and recruitment efforts.

Table Nine
Potential Supply Chain Target Industries 2022 Seward County Study Area
Employment, Average Wages, LQ, Preliminary Data, 2022 Q2

NAICS Industry	Jobs	Average Annual Wage (\$)	LQ	Purchased Within Region (\$)	Imported Into Region (\$)
Retail Trade					
NAICS 4411 Automobile Dealers	426	\$55,618	1.18	\$2,444,065	\$11,546,404
NAICS 4413 Automotive Parts, Accessories, and Tire Stores	264	\$32,989	1.64	\$1,053,427	\$2,740,716
Administrative and Support and Waste Management and Remediation Services					
NAICS 5613 Employment Services	236	\$28,861	0.23	\$5,349,000	\$18,621,341
NAICS 5617 Services to Buildings and Dwellings	402	\$35,814	0.64	\$10,211,173	\$8,866,051
Accommodation and Food Services					
NAICS 7225 Restaurants and Other Eating Places	1,858	\$14,897	0.66	\$2,695,700	\$3,003,680

Source: Values calculated by Melissa L. Trueblood, Ph.D., Economist, Nebraska Public Power District from data in Lightcast Q2 2022 Data Set