



Regional Data Snapshot

Industry Cluster Analysis

SET Session 1

Forest Country Region, Texas

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01 overview

Forest Country Region, TX

Overview

Forest Country Region

The Forest Country Region is comprised of 12 Texas counties. State Highway 59 connects the region to I-69 and Houston to the south, while State Highway 190 connects the region to I-45 to the west.

- Angelina
- Houston
- Jasper
- Nacogdoches
- Newton
- Polk
- Sabine
- San Augustine
- San Jacinto
- Shelby
- Trinity
- Tyler



02 industry and occupation

Establishments

Employment by industry

Industry and occupation

Establishments

Components of Change for Establishments 2000-2013

Total Change	5,780
Percent Change	35.6%
Net Change (Establishments launched minus Establishments closed)	5,478
Net Migration (Establishments moving into minus Establishments moving out of the region)	302

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.



Definition of Company Stages



section 02

Note: The difference between total change in establishments estimated via components of change versus two points of time seems related to the estimation of Startups and Relocation in the database.

Industry and occupation

Establishments

Number of Establishments by Company Stages

Stage	2000		2013	
	Establishments	Proportion	Establishments	Proportion
Stage 0	4,756	29.3%	5,945	26.9%
Stage 1	9,189	56.6%	13,591	61.5%
Stage 2	2,123	13.1%	2,400	10.9%
Stage 3	149	0.9%	137	0.6%
Stage 4	25	0.2%	20	0.1%
Total	16,242	100.0%	22,093	100.0%

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Industry and occupation

Establishments

Number of Jobs by Company Stages

Year	2000	2013	% Change
Stage 0	4,756	5,945	25.0%
Stage 1	32,704	41,664	27.4%
Stage 2	53,512	60,938	13.9%
Stage 3	25,583	23,526	-8.0%
Stage 4	25,562	18,377	-28.1%
Total	142,117	150,450	5.9%

Sales (\$ 2013) by Company Stages

Year	2000	2013	% Change
Stage 0	\$601,747,625	\$365,938,669	-39.2%
Stage 1	\$4,598,075,509	\$3,102,043,577	-32.5%
Stage 2	\$6,824,574,715	\$4,761,170,778	-30.2%
Stage 3	\$3,275,198,788	\$3,578,813,747	9.3%
Stage 4	\$3,148,515,792	\$1,666,332,742	-47.1%
Total	\$18,448,112,430	\$13,474,299,513	-27.0%

Questions

What establishments are the most numerous based on company stages?

What stages have experienced the largest growth? The greatest decline?

What company stage employs the largest number of people?

What stage captures the most sales?

Which ones have experienced the greatest percentage loss over the 2000-13 period?

Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
21	Mining, Quarrying, and Oil and Gas Extraction	2,467	4,901	2434	99%	56%
48	Transportation and Warehousing	3,916	4,531	615	16%	16%
53	Real Estate and Rental and Leasing	4,700	5,229	529	11%	14%
52	Finance and Insurance	6,335	6,957	622	10%	13%
42	Wholesale Trade	3,409	3,726	317	9%	15%
71	Arts, Entertainment, and Recreation	1,508	1,625	117	8%	14%
56	Administrative and Support and Waste Management and Remediation Services	7,881	8,434	553	7%	19%
62	Health Care and Social Assistance	17,729	18,734	1005	6%	15%
72	Accommodation and Food Services	9,858	10,354	496	5%	18%
61	Educational Services	914	940	26	3%	16%

Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

Industry and occupation

Top eight industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
55	Management of Companies and Enterprises	1,068	874	-194	-18%	36%
51	Information	1,391	1,256	-135	-10%	1%
31	Manufacturing	15,094	14,131	-963	-6%	7%
11	Crop and Animal Production	12,892	12,197	-695	-5%	0%
90	Government	27,820	26,699	-1121	-4%	0%
23	Construction	10,508	10,313	-195	-2%	7%
44	Retail Trade	17,471	17,338	-133	-1%	9%
22	Utilities	819	813	-6	-1%	1%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

03 Industry cluster analysis

Forest Country Region, TX

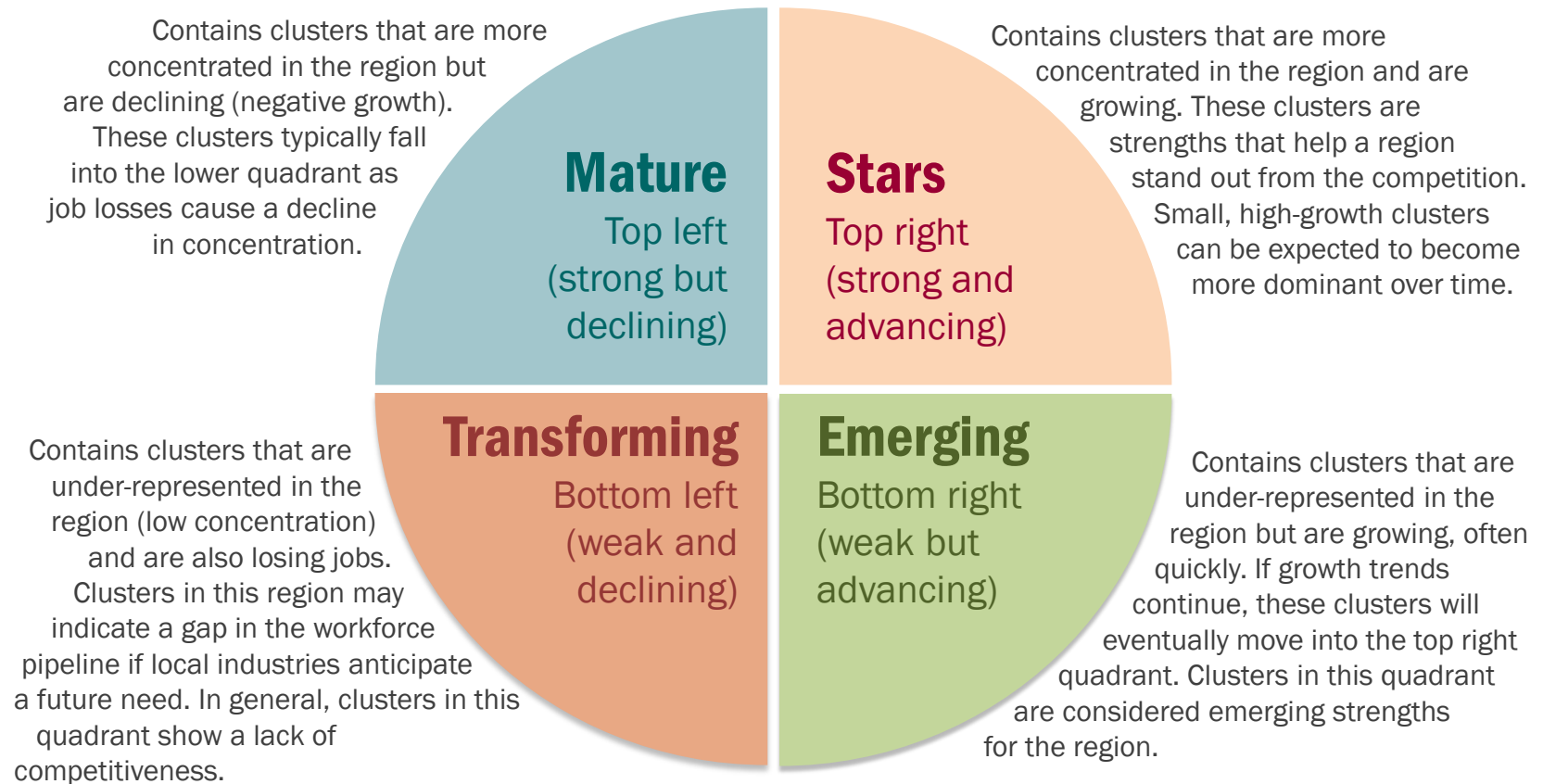
List of Clusters

- Advanced Materials
- Agribusiness, Food Processing & Technology
- Apparel & Textiles
- Arts, Entertainment, Recreation & Visitor Industries
- Biomedical/Biotechnical (Life Sciences)
- Business & Financial Services
- Chemicals
- Computer & Electronic Product Manufacturing
- Defense & Security
- Education & Knowledge Creation
- Electrical Equip, Appliance & Component Manufacturing
- Fabricated Metal Product Manufacturing
- Energy (Fossil & Renewable)
- Forest & Wood Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Machinery Manufacturing
- Manufacturing Super-cluster
- Mining
- Primary Metal Manufacturing
- Printing & Publishing
- Transportation & Logistics
- Transportation Equipment Manufacturing

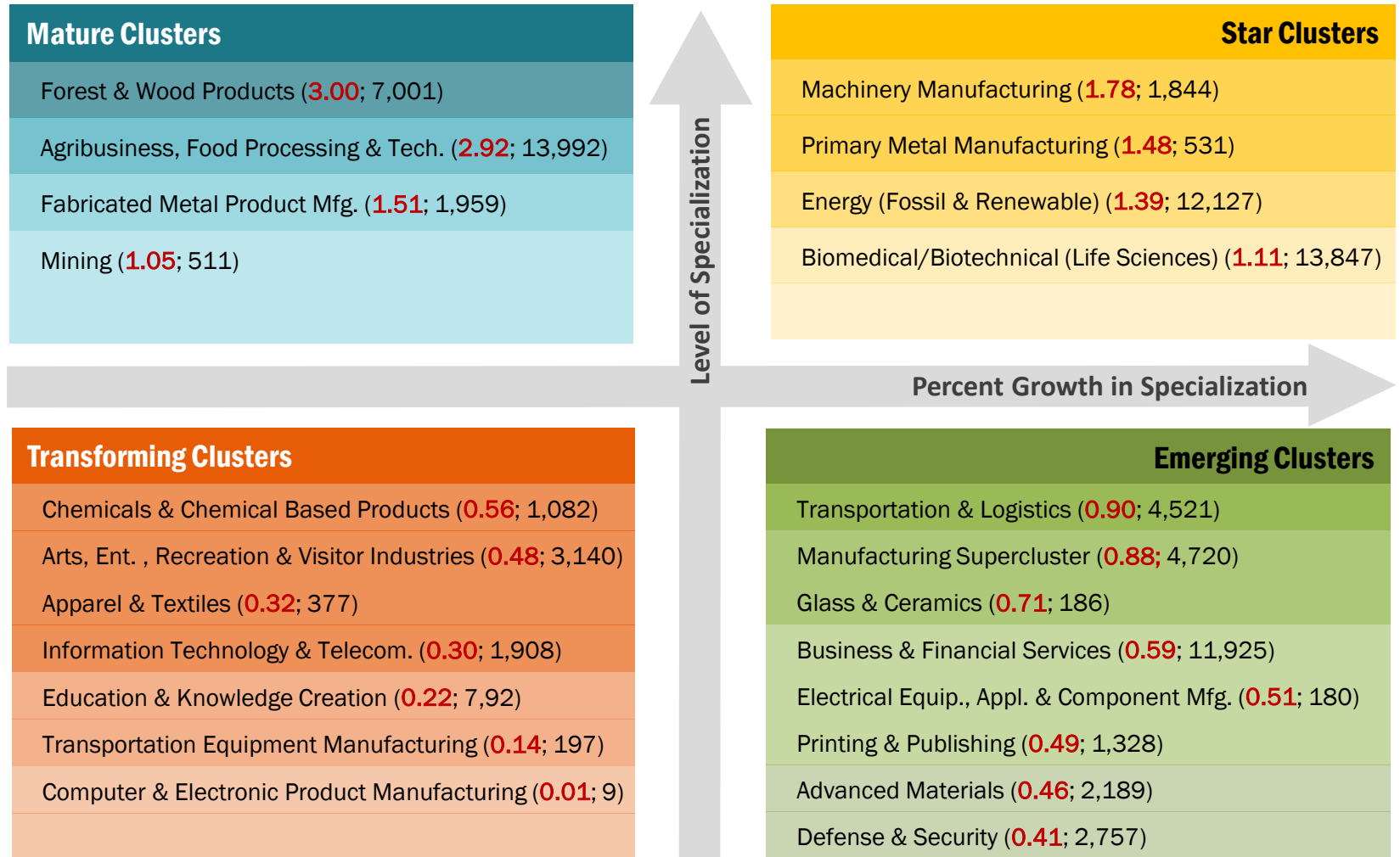
Industry cluster analysis

How to interpret cluster data results

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



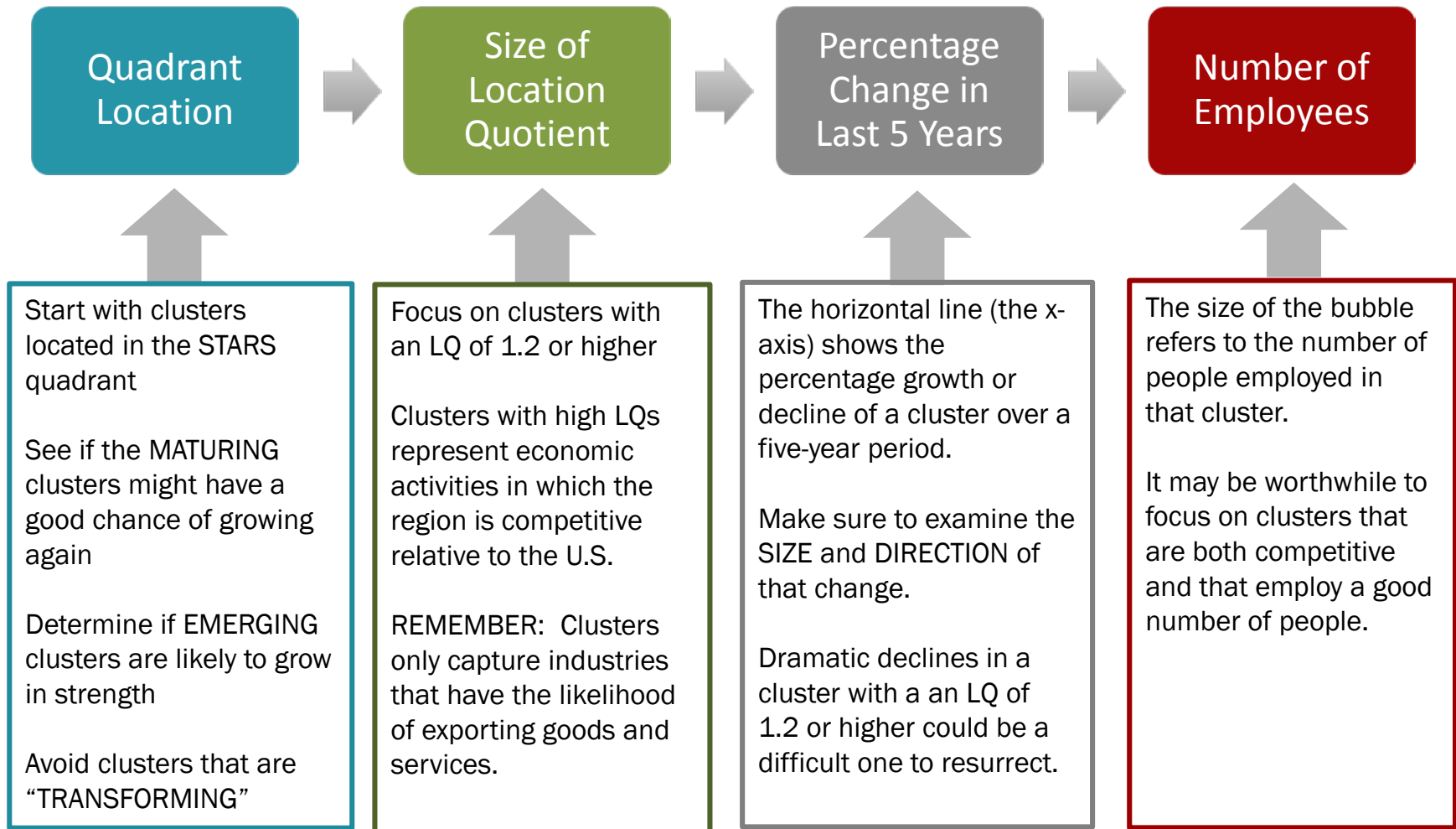
Industry cluster analysis



section 03

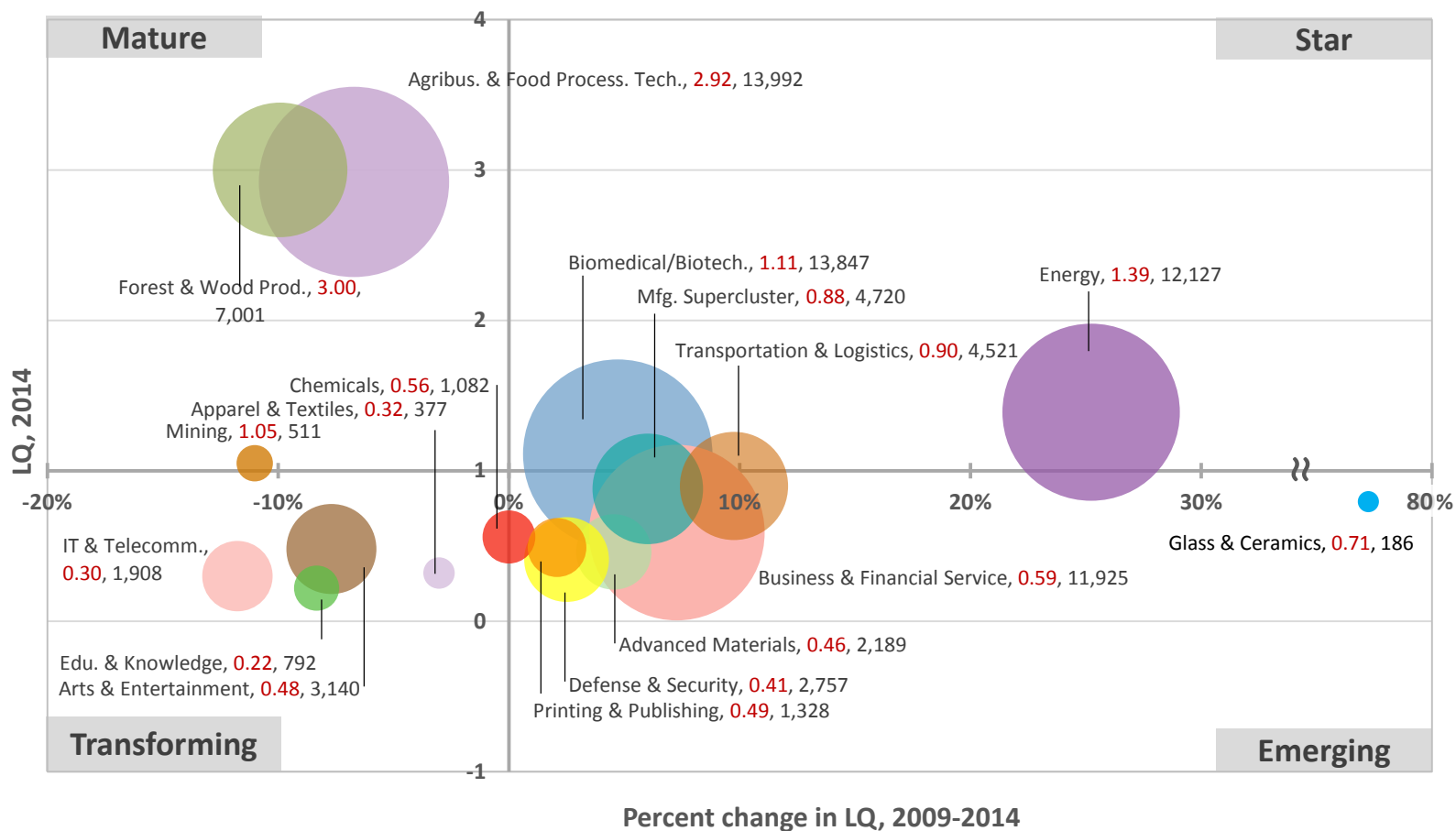
NOTE: The first number after each cluster represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient as shown in the bubble chart.

Bubble Chart: What to Look at First



Industry and occupation

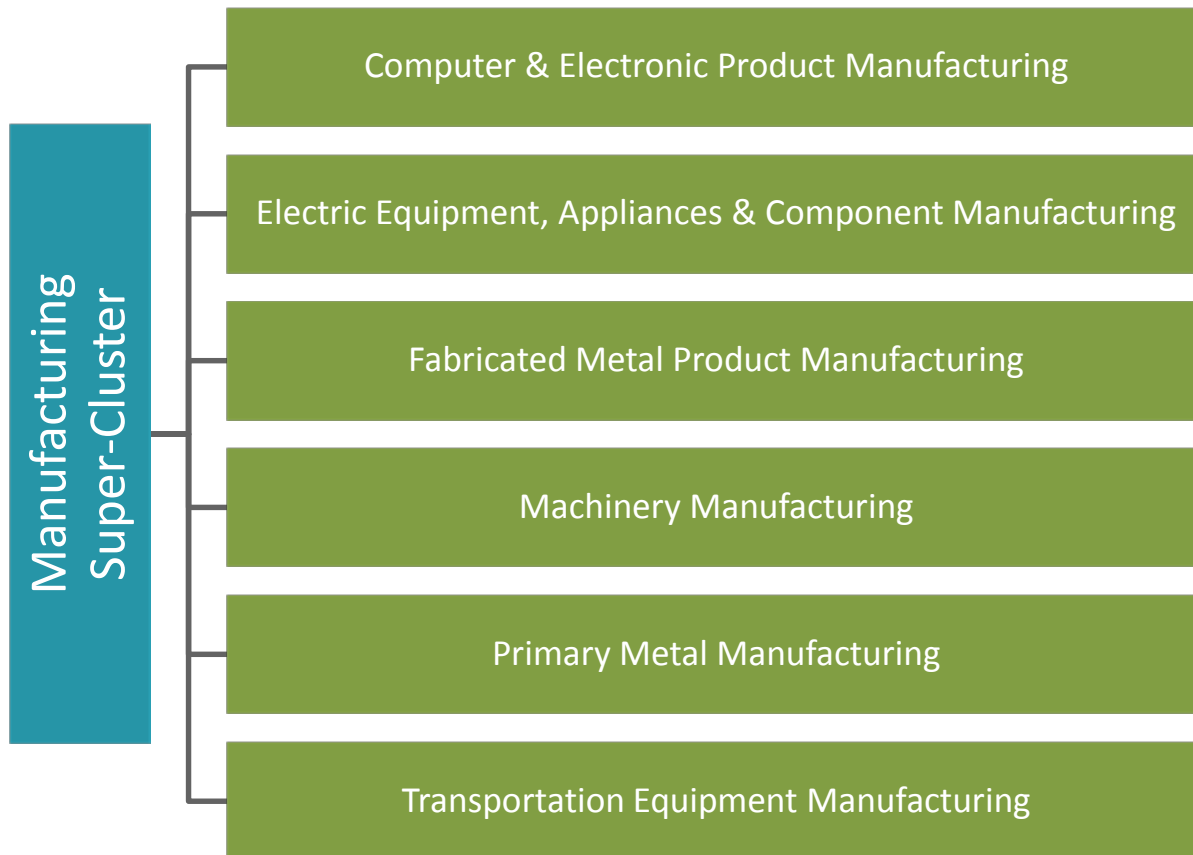
Industry cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014

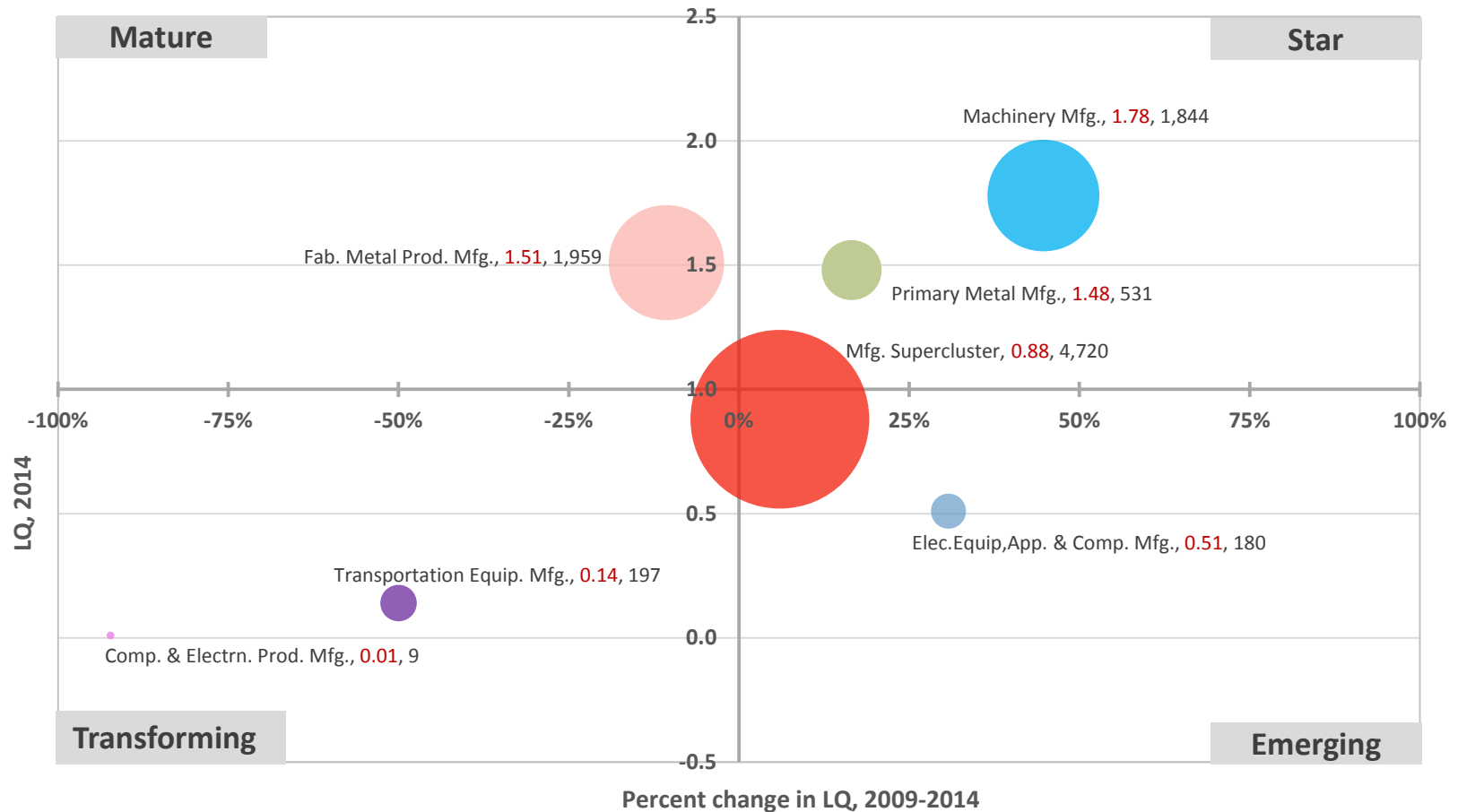
The Manufacturing Super-Cluster

Please note that this is not a cluster that a SET region should select. Rather, focus on the manufacturing sub-clusters that are important to that super-cluster.



Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014

Industry and occupation

For your region

Mature Industries

Four industry clusters in the Forest Country Region are in the Matured stage: Forest & Wood Products; Agribusiness, Food Processing & Tech.; Fabricated Metal Product Mfg.; and Mining. These industries are relatively concentrated, but its growth is trending downward. It is worth noting, however, that the Forest County 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 Forest Country Region, Chemicals; Arts, Ent., Rec. & Visitor Industries; Apparel & Textiles; IT & Telecom.; Education & Knowledge Creation; Transportation Equipment Mfg.; and Computer & Electronic Product Mfg. are all Transforming clusters. 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. Four Star industry clusters in the Forest Country Region are Machinery Mfg.; Primary Metal Mfg.; Energy; and Biomedical/Biotechnical (Life Sciences). These clusters indicate that they have a little more jobs concentration in the region compared to the U.S.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are eight Emerging clusters in total in the Forest County Region. These are Transportation & Logistics; Manufacturing Supercluster; Glass & Ceramics; Business & Financial Services; Electrical Equipment, Appliance & Component Mfg.; Printing & Publishing; Advanced Materials; and Defense & Security.

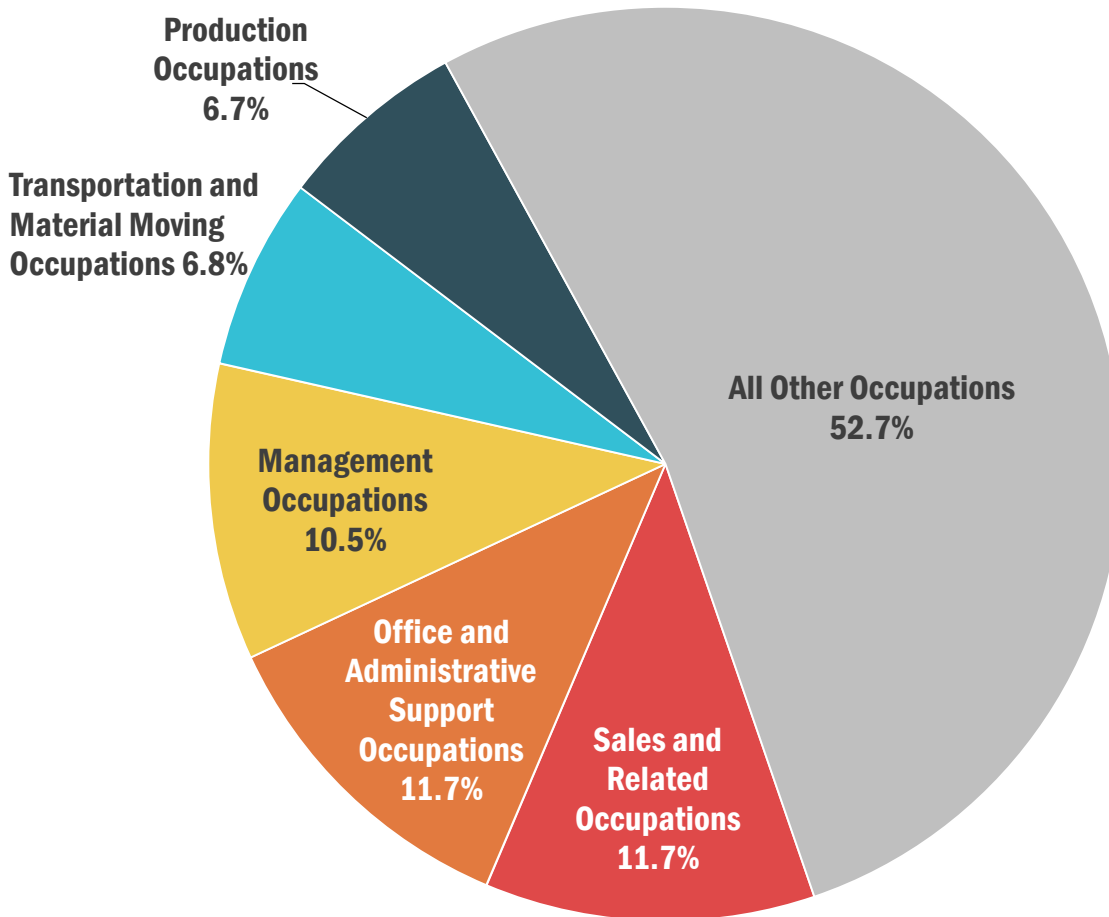
04 occupations

Top occupations

STEM occupations

Industry and occupation

Top five occupations in 2014

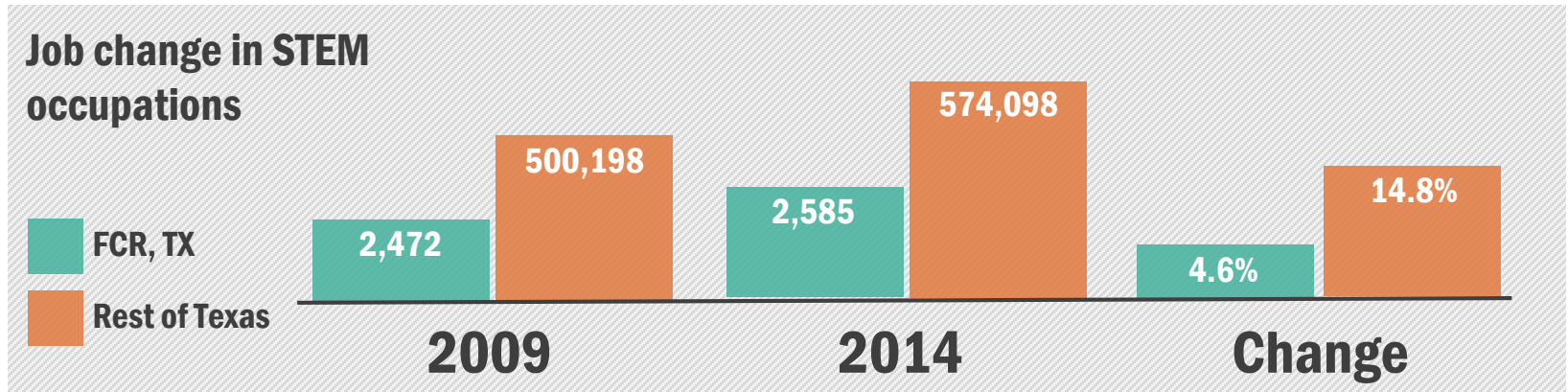


Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

Industry and occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

Report Contributors

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