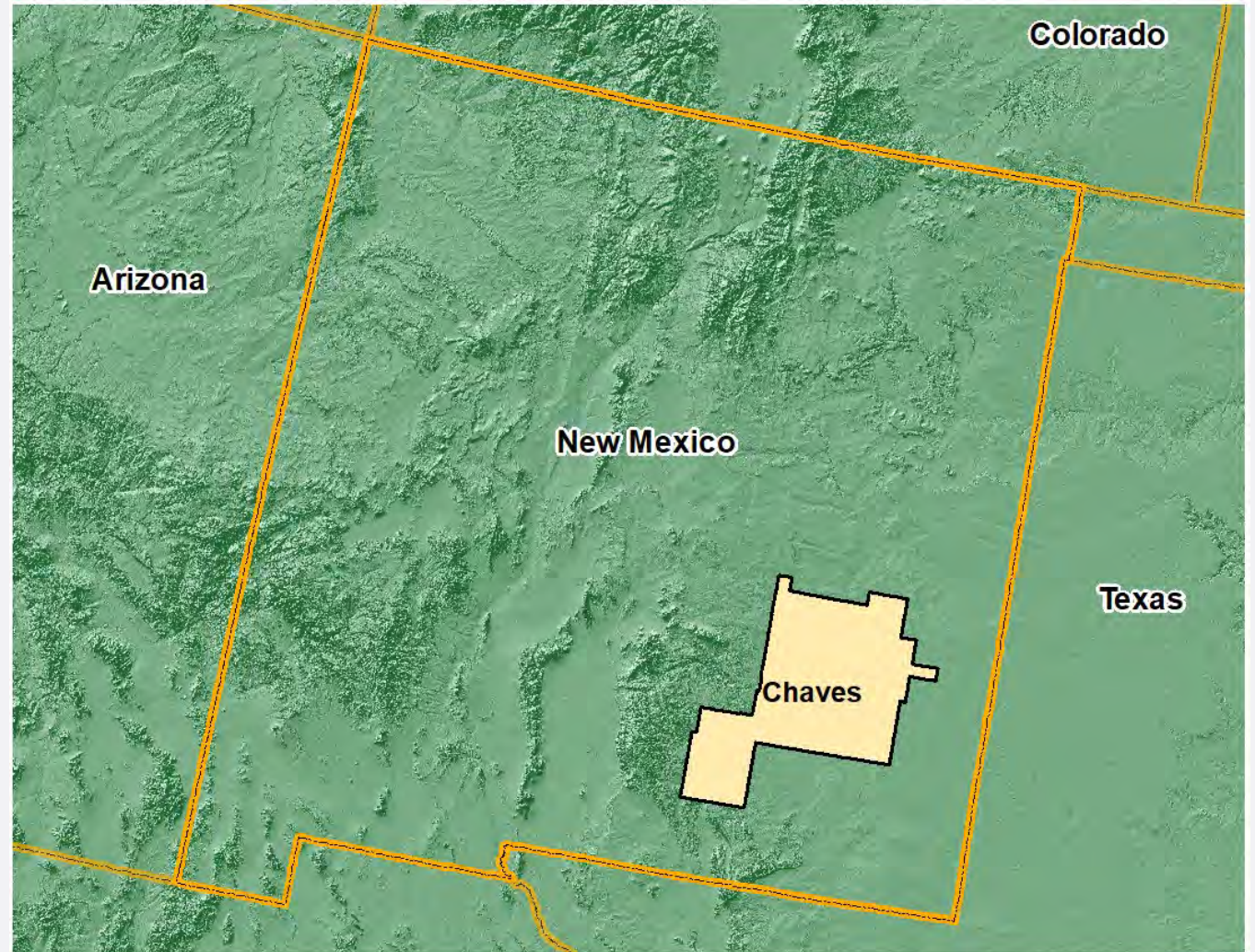


Industry Cluster

Chaves County, New Mexico

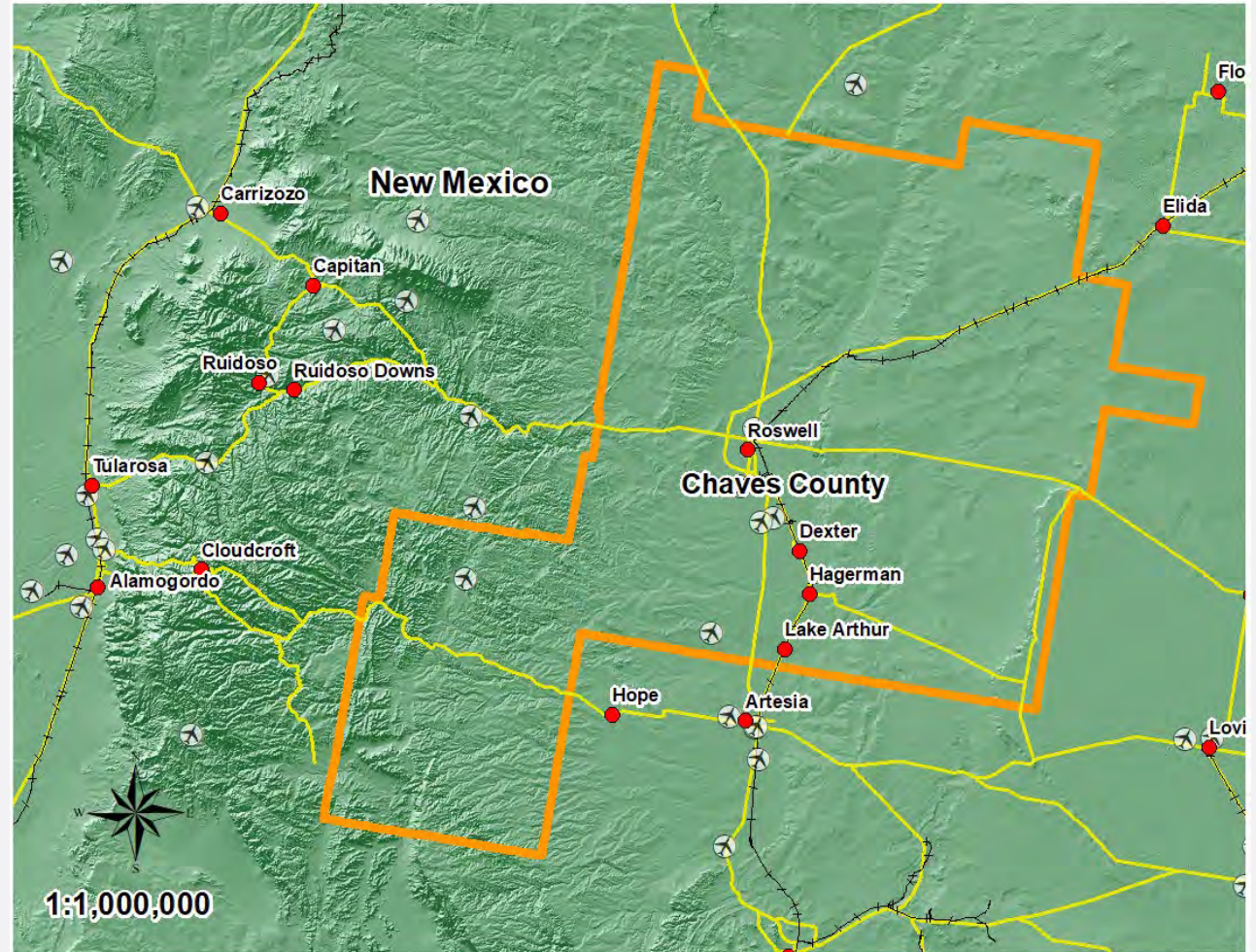


Cluster Drill-down Analysis
February 2023



Southeastern New Mexico Region

- Chaves County





Industry cluster drilldown

- 1. Agribusiness, food processing and technology**
- 2. Transportation and logistics**
- 3. Energy (fossil and renewable)**



Regional Job Growth:

Three Key Components of the Shift-Share Analysis

Expected Change

The sum of the industrial mix and the national growth effects

National Growth Effect

Explains how much of the regional industry's growth is explained by the overall growth of the national economy

Industrial Mix Effect

Share of regional industry growth explained by the growth of the specific industry sector at the national level

Regional Competitive Effect

Explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses

Note:

The calculations ensure no double counting of job change effects from national to regional levels



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Animal Production	1,384	20	-67	-47	-56	-9
Cheese Manufacturing	524	7	117	124	18	-106
Crop Production	368	5	-10	-5	-12	-7
Farm Labor Contractors and Crew Leaders	148	2	-1	0	40	↑ 40
Livestock Merchant Wholesalers	70	1	-7	-6	3	↑ 9
Meat Processed from Carcasses	60	0	0	0	Insf. Data	↑ 58
Other Snack Food Manufacturing	57	0	2	2	40	↑ 38
Farm Supplies Merchant Wholesalers	48	1	0	0	-5	-6
Farm and Garden Machinery and Equipment Merchant Wholesalers	44	0	1	1	10	↑ 9
Perishable Prepared Food Manufacturing	33	0	1	1	Insf. Data	↑ 27
Retail Bakeries	17	0	0	0	Insf. Data	↑ 13
Farm Management Services	15	0	1	1	5	↑ 4
Cotton Ginning	14	0	-1	0	-20	-20
Other Farm Product Raw Material Merchant Wholesalers	11	0	1	1	Insf. Data	↑ 7
Soil Preparation, Planting, and Cultivating	11	0	0	0	-9	-9

Note: Upward arrow (↑) indicates regional competitiveness.



Shift-Share Analysis 2021

Industries that Outperformed

- Meat Processed from Carcasses
- Farm Labor Contractors and Crew Leaders
- Other Snack Food Manufacturing
- Perishable Prepared Food Manufacturing
- Retail Bakeries
- Livestock Merchant Wholesalers
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Other Farm Product Raw Material Merchant Wholesalers
- Farm Management Services

Industries that Underperformed

- Farm Supplies Merchant Wholesalers
- Crop Production
- Animal Production
- Soil Preparation, Planting, and Cultivating
- Cotton Ginning
- Cheese Manufacturing

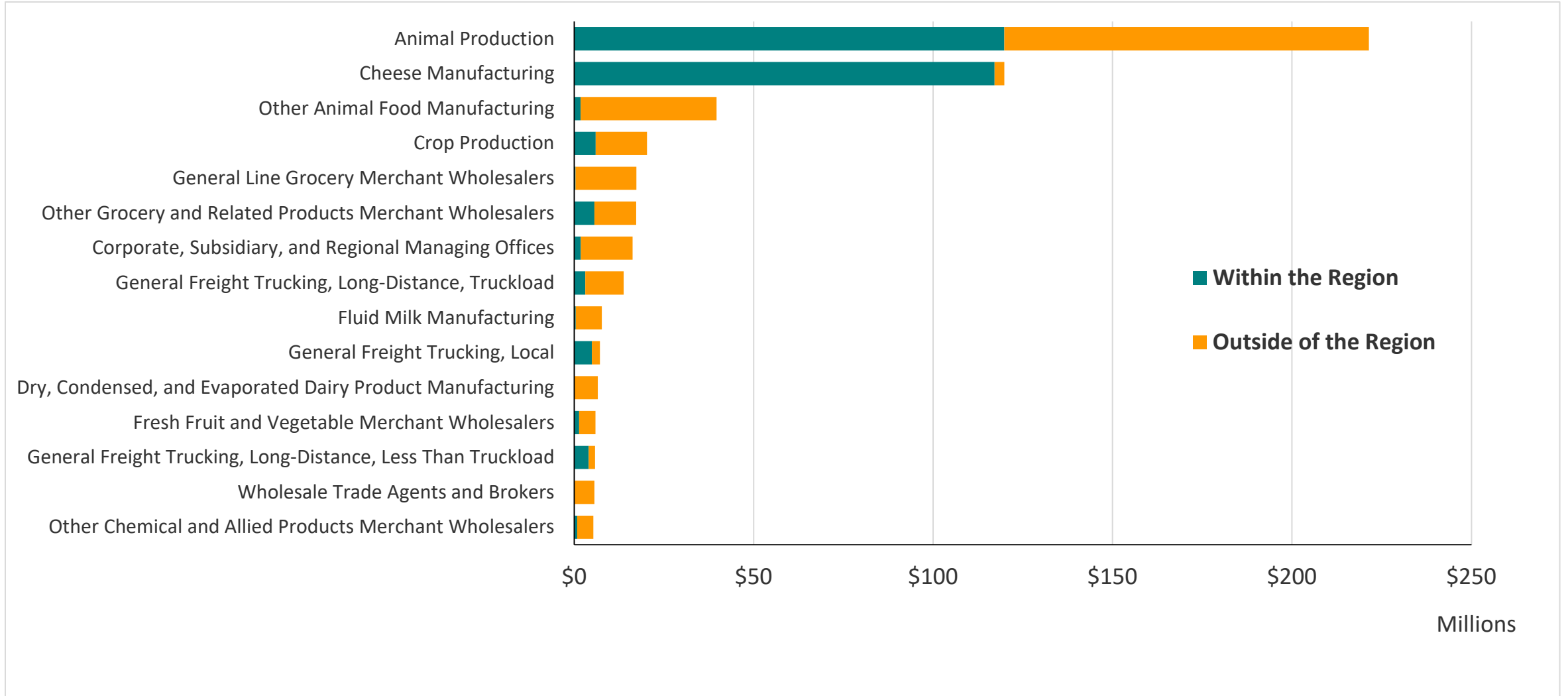


Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Animal Production	221.4	54.1%	45.9%
Cheese Manufacturing	119.8	97.8%	2.2%
Other Animal Food Manufacturing	39.7	4.5%	95.5%
Crop Production	20.3	29.6%	70.4%
General Line Grocery Merchant Wholesalers	17.3	2.1%	97.9%
Other Grocery and Related Products Merchant Wholesalers	17.2	32.7%	67.3%
Corporate, Subsidiary, and Regional Managing Offices	16.2	11.5%	88.5%
General Freight Trucking, Long-Distance, Truckload	13.8	22.1%	77.9%
Fluid Milk Manufacturing	7.7	5.1%	94.9%
General Freight Trucking, Local	7.1	68.8%	31.2%
Dry, Condensed, and Evaporated Dairy Product Manufacturing	6.6	0.0%	100.0%
Fresh Fruit and Vegetable Merchant Wholesalers	5.9	23.1%	76.9%
General Freight Trucking, Long-Distance, Less Than Truckload	5.8	69.5%	30.5%
Wholesale Trade Agents and Brokers	5.6	0.5%	99.5%
Other Chemical and Allied Products Merchant Wholesalers	5.3	15.9%	84.1%



Leakage analysis 2021

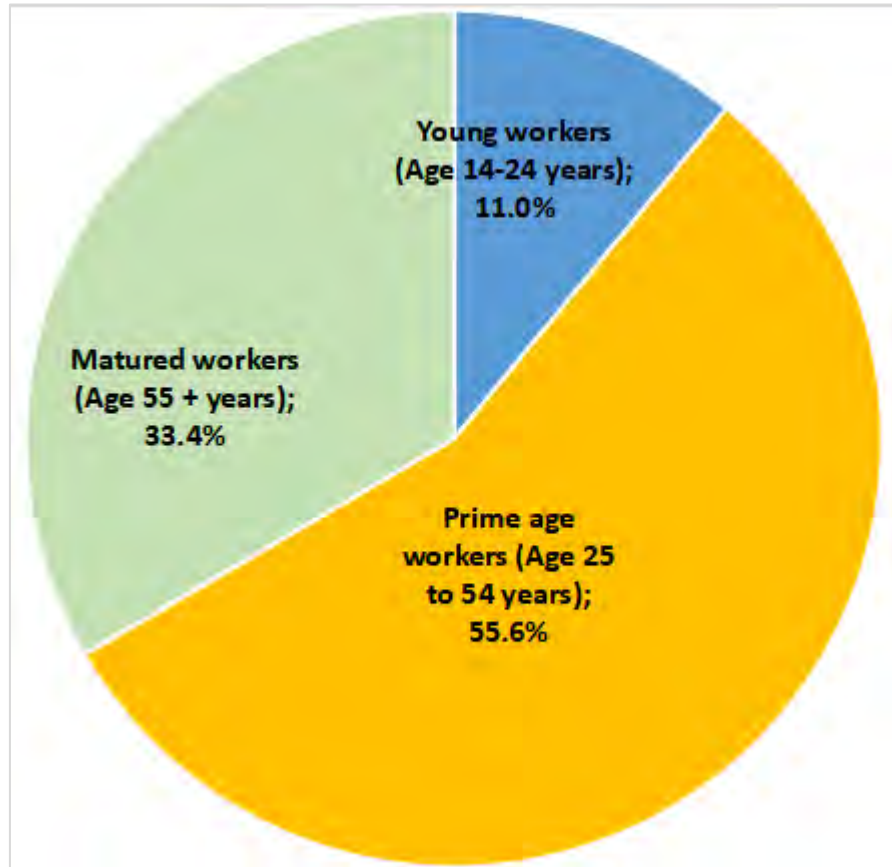




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Farmers, Ranchers, and Other Agricultural Managers	800	12.08%	28.1%	\$17.38	High school diploma or equivalent	93.5
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	456	-15.24%	16.0%	\$10.78	No formal educational credential	113
Farmworkers, Farm, Ranch, and Aquacultural Animals	195	-11.81%	6.9%	\$13.62	No formal educational credential	107.3
Food Batchmakers	102	-8.08%	3.6%	\$19.53	High school diploma or equivalent	111.3
Packaging and Filling Machine Operators and Tenders	88	38.86%	3.1%	\$14.45	High school diploma or equivalent	116.9
Agricultural Workers, All Other	85	5.48%	3.0%	\$13.12	No formal educational credential	107.7
Agricultural Equipment Operators	68	-4.60%	2.4%	\$14.23	No formal educational credential	102.9
Heavy and Tractor-Trailer Truck Drivers	64	-9.42%	2.2%	\$20.81	Postsecondary nondegree award	110.1
Laborers and Freight, Stock, and Material Movers, Hand	55	0.53%	1.9%	\$13.36	No formal educational credential	117.2
Packers and Packagers, Hand	43	35.58%	1.5%	\$11.02	No formal educational credential	123.1
Maintenance and Repair Workers, General	42	26.52%	1.5%	\$17.21	High school diploma or equivalent	109.6
Industrial Machinery Mechanics	40	-1.50%	1.4%	\$26.44	High school diploma or equivalent	109.8
First-Line Supervisors of Farming, Fishing, and Forestry Workers	35	-20.09%	1.2%	\$16.12	High school diploma or equivalent	96
First-Line Supervisors of Production and Operating Workers	35	-1.54%	1.2%	\$33.39	High school diploma or equivalent	88.6
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	32	4.23%	1.1%	\$21.91	High school diploma or equivalent	91.5



Worker demographics 2021



- Hispanic workers (47.0%)
- Black or African-American workers (3.0%)
- Asian workers (2.0%)
- White workers (45%)
- Others (3%)

- Male workers (74%)
- Female workers (26%)

- One-third (34%) of the workforce is comprised of matured (aged 55 years or more) workers.



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Couriers and Express Delivery Services	238	1	79	80	148	↑ 67
General Freight Trucking, Local	179	2	13	15	53	↑ 38
Other Support Activities for Air Transportation	158	4	19	23	-121	-144
General Freight Trucking, Long-Distance, Truckload	76	1	3	4	28	↑ 24
General Freight Trucking, Long-Distance, Less Than Truckload	64	1	5	6	2	-4
Scheduled Passenger Air Transportation	58	0	-1	-1	40	↑ 41
Specialized Freight (except Used Goods) Trucking, Local	36	1	1	2	-5	-7
Pipeline Transportation of Natural Gas	35	0	1	1	3	↑ 1
Other Airport Operations	25	0	0	0	7	↑ 7
Charter Bus Industry	19	0	0	0	18	↑ 18
Other Warehousing and Storage	16	0	1	1	Insf. Data	↑ 8
Specialized Freight (except Used Goods) Trucking, Long-Distance	15	0	-1	0	-3	-3
Freight Transportation Arrangement	<10	0	0	0	Insf. Data	↑ 1
Other Support Activities for Road Transportation	<10	0	0	0	Insf. Data	-6
Motor Vehicle Towing	<10	0	0	0	Insf. Data	-3

Several mining sectors show <10 jobs.

Note: Upward arrow (↑) indicates regional competitiveness.



Shift-Share Analysis 2021

Industries that Outperformed

- Couriers and Express Delivery Services
- Scheduled Passenger Air Transportation
- General Freight Trucking, Local
- General Freight Trucking, Long-Distance, Truckload
- Charter Bus Industry
- Other Warehousing and Storage
- Other Airport Operations
- Pipeline Transportation of Natural Gas
- Freight Transportation Arrangement

Industries that Underperformed

- Specialized Freight (except Used Goods) Trucking, Long-Distance
- Motor Vehicle Towing
- General Freight Trucking, Long-Distance, Less Than Truckload
- Other Support Activities for Road Transportation
- Specialized Freight (except Used Goods) Trucking, Local
- Other Support Activities for Air Transportation

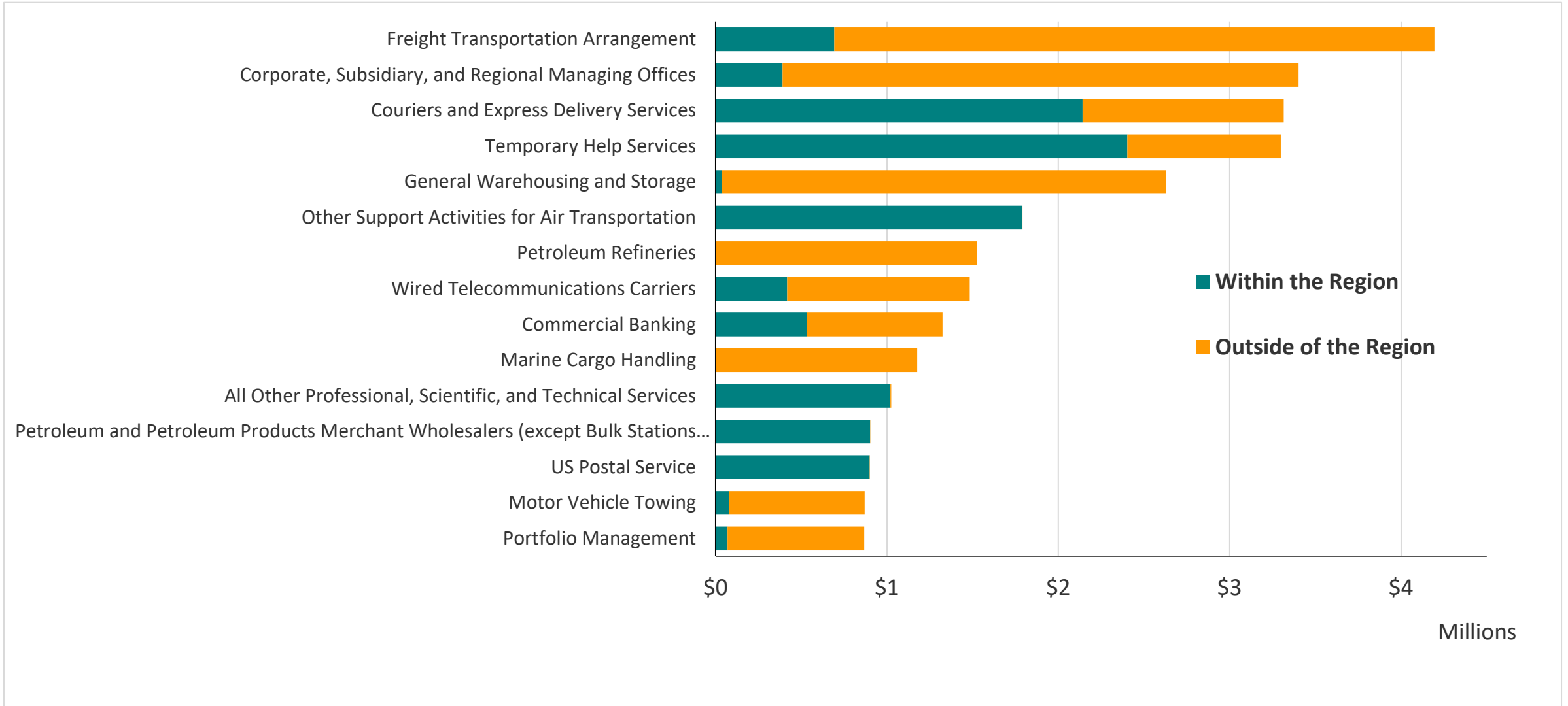


Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Freight Transportation Arrangement	\$4.2	16.5%	83.5%
Corporate, Subsidiary, and Regional Managing Offices	\$3.4	11.5%	88.5%
Couriers and Express Delivery Services	\$3.3	64.6%	35.4%
Temporary Help Services	\$3.3	72.8%	27.2%
General Warehousing and Storage	\$2.6	1.4%	98.6%
Other Support Activities for Air Transportation	\$1.8	100.0%	0.0%
Petroleum Refineries	\$1.5	0.0%	100.0%
Wired Telecommunications Carriers	\$1.5	28.2%	71.8%
Commercial Banking	\$1.3	40.2%	59.8%
Marine Cargo Handling	\$1.2	0.0%	100.0%
All Other Professional, Scientific, and Technical Services	\$1.0	99.4%	0.6%
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$0.9	99.9%	0.1%
US Postal Service	\$0.9	99.9%	0.1%
Motor Vehicle Towing	\$0.9	8.9%	91.1%
Portfolio Management	\$0.9	8.0%	92.0%



Leakage analysis 2021

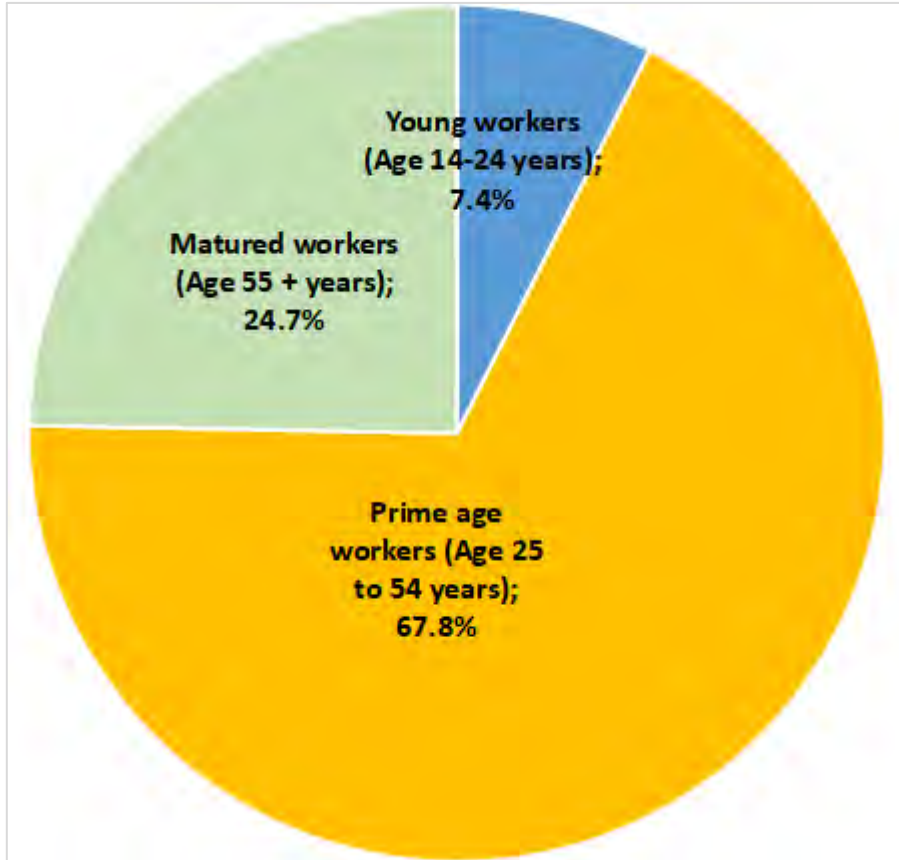




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Heavy and Tractor-Trailer Truck Drivers	301	13%	31.0%	\$20.81	Postsecondary nondegree award	110.1
Aircraft Mechanics and Service Technicians	147	184%	15.1%	\$33.15	Postsecondary nondegree award	101.2
Light Truck Drivers	93	81%	9.6%	\$16.71	High school diploma or equivalent	112.9
Laborers and Freight, Stock, and Material Movers, Hand	79	3%	8.1%	\$13.36	No formal educational credential	117.2
Couriers and Messengers	53	276%	5.4%	\$12.20	High school diploma or equivalent	105.3
Commercial Pilots	19	9%	1.9%	\$39.36	High school diploma or equivalent	89.6
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	15	7%	1.6%	\$22.09	High school diploma or equivalent	93.8
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	13	(20%)	1.3%	\$17.39	High school diploma or equivalent	91.4
Shipping, Receiving, and Inventory Clerks	12	211%	1.2%	\$16.98	High school diploma or equivalent	109.1
Avionics Technicians	11	50%	1.2%	\$21.92	Associate's degree	100
Reservation and Transportation Ticket Agents and Travel Clerks	11	84%	1.2%	\$19.92	High school diploma or equivalent	94.4
Managers, All Other	11	30%	1.1%	\$27.67	Bachelor's degree	84.5
Bus and Truck Mechanics and Diesel Engine Specialists	10	(6%)	1.1%	\$20.07	High school diploma or equivalent	114.6
Customer Service Representatives	10	5%	1.1%	\$13.93	High school diploma or equivalent	96.4
Dispatchers, Except Police, Fire, and Ambulance	10	14%	1.0%	\$16.80	High school diploma or equivalent	95.1



Worker demographics 2021



- Hispanic workers (49%)
- Black or African-American workers (5%)
- Asian workers (2%)
- White workers (43%)
- Others (1%)

- Male workers (84%)
- Female workers (16%)

- Nearly one-quarter (25%) of the workforce is comprised of matured (aged 55 years or more) workers.



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Crude Petroleum Extraction	972	34	-1,343	-1,309	-1,454	-145
Plumbing, Heating, and Air-Conditioning Contractors	238	3	23	26	32	↑ 6
Support Activities for Oil and Gas Operations	190	2	-28	-26	53	↑ 78
Gasoline Stations with Convenience Stores	167	3	2	5	-43	-48
Electrical Contractors and Other Wiring Installation Contractors	100	2	14	16	-46	-62
Miscellaneous Intermediation	86	1	2	3	5	↑ 2
Fuel Dealers	82	2	-7	-5	-59	-54
Natural Gas Extraction	80	2	-69	-67	-49	↑ 17
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	74	2	0	1	-34	-35
Engineering Services	58	1	4	5	6	↑ 1
Other Heavy and Civil Engineering Construction	53	0	1	1	24	↑ 22
Water and Sewer Line and Related Structures Construction	51	1	3	3	1	-2
Electric Power Distribution	42	0	0	0	25	↑ 25
Drilling Oil and Gas Wells	40	2	-31	-29	-86	-57
Other Gasoline Stations	37	1	-5	-4	-6	-2

Note: Upward arrow (↑) indicates regional competitiveness.



Shift-Share Analysis 2021

Industries that Outperformed

- Support Activities for Oil and Gas Operations
- Electric Power Distribution
- Other Heavy and Civil Engineering Construction
- Natural Gas Extraction
- Plumbing, Heating, and Air-Conditioning Contractors
- Miscellaneous Intermediation
- Engineering Services

Industries that Underperformed

- Other Gasoline Stations
- Water and Sewer Line and Related Structures Construction
- Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
- Gasoline Stations with Convenience Stores
- Fuel Dealers
- Drilling Oil and Gas Wells
- Electrical Contractors and Other Wiring Installation Contractors
- Crude Petroleum Extraction

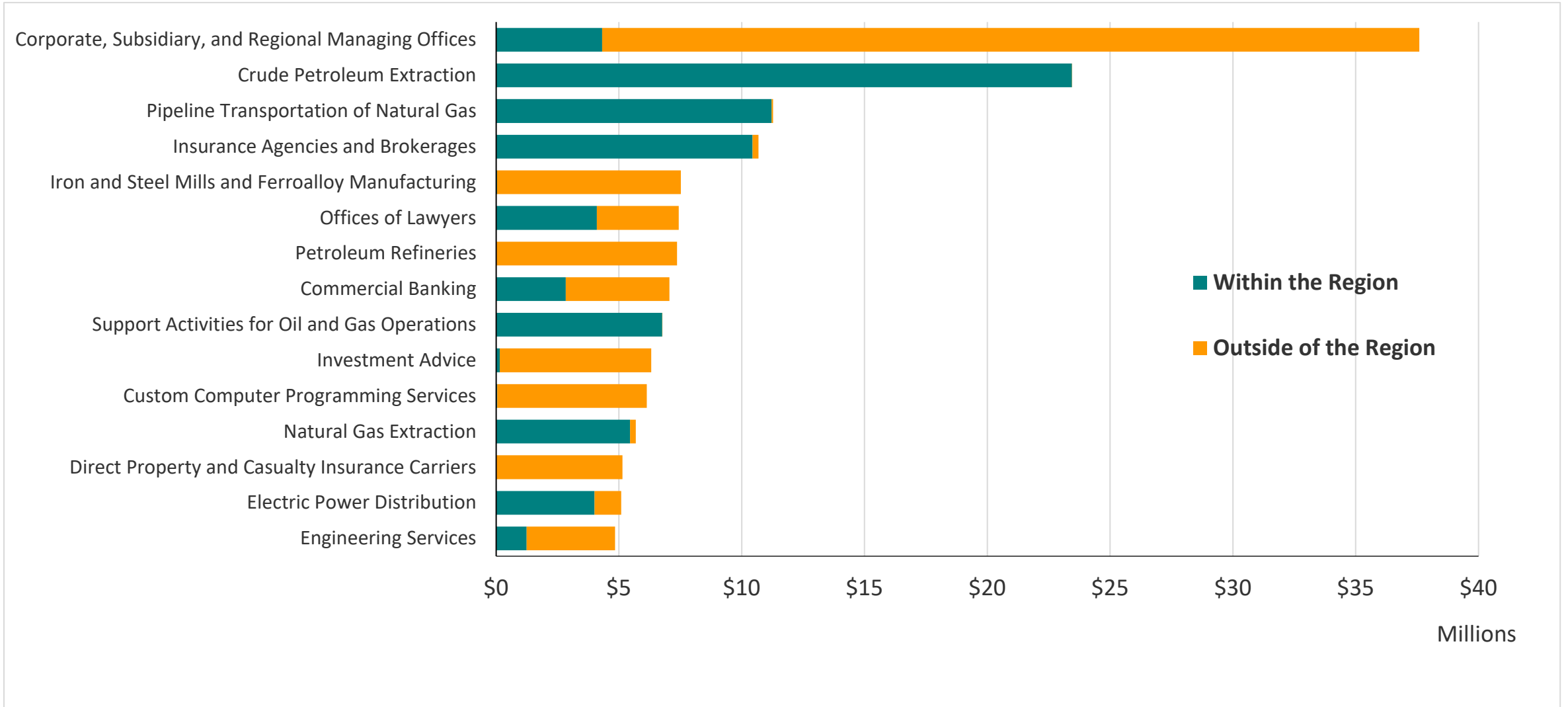


Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$37.6	11.5%	88.5%
Crude Petroleum Extraction	\$23.4	100.0%	0.0%
Pipeline Transportation of Natural Gas	\$11.3	99.5%	0.5%
Insurance Agencies and Brokerages	\$10.7	97.7%	2.3%
Iron and Steel Mills and Ferroalloy Manufacturing	\$7.5	0.5%	99.5%
Offices of Lawyers	\$7.4	55.1%	44.9%
Petroleum Refineries	\$7.4	0.0%	100.0%
Commercial Banking	\$7.1	40.2%	59.8%
Support Activities for Oil and Gas Operations	\$6.8	99.9%	0.1%
Investment Advice	\$6.3	2.3%	97.7%
Custom Computer Programming Services	\$6.1	0.8%	99.2%
Natural Gas Extraction	\$5.7	95.9%	4.1%
Direct Property and Casualty Insurance Carriers	\$5.1	0.0%	100.0%
Electric Power Distribution	\$5.1	78.6%	21.4%
Engineering Services	\$4.8	25.7%	74.3%



Leakage analysis 2021

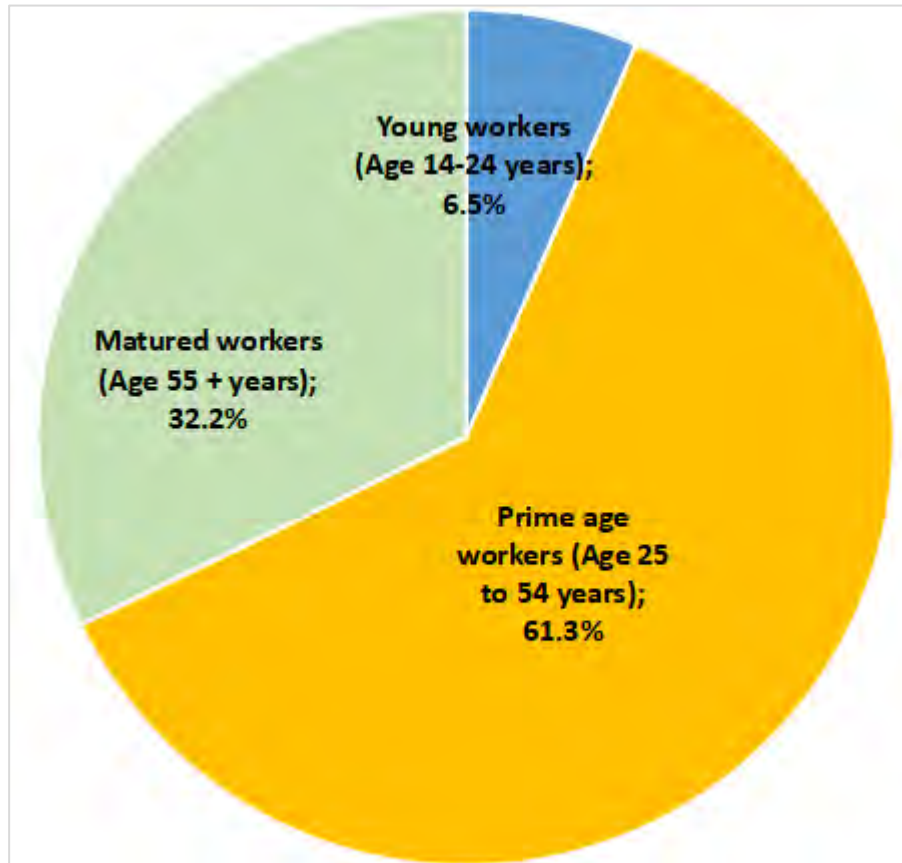




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Managers, All Other	253	-47.5%	10.1%	\$27.67	Bachelor's degree	84.5
Wellhead Pumpers	135	-64.2%	5.4%	\$32.04	High school diploma or equivalent	115.1
Cashiers	124	-25.2%	5.0%	\$10.62	No formal educational credential	105.5
General and Operations Managers	116	-47.1%	4.6%	\$39.52	Bachelor's degree	82.2
First-Line Supervisors of Construction Trades and Extraction Workers	99	-41.5%	4.0%	\$27.09	High school diploma or equivalent	106.2
Property, Real Estate, and Community Association Managers	96	-54.2%	3.8%	\$27.70	High school diploma or equivalent	83.8
Electricians	94	-17.5%	3.8%	\$25.38	High school diploma or equivalent	110.3
Project Management Specialists	78	38.6%	3.1%	\$41.58	Bachelor's degree	86.8
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	72	-32.8%	2.9%	\$17.39	High school diploma or equivalent	91.4
Plumbers, Pipefitters, and Steamfitters	69	61.3%	2.7%	\$23.15	High school diploma or equivalent	116.3
Construction Laborers	67	15.2%	2.7%	\$12.93	No formal educational credential	131.9
Laborers and Freight, Stock, and Material Movers, Hand	57	11.6%	2.3%	\$13.36	No formal educational credential	117.2
Heavy and Tractor-Trailer Truck Drivers	45	-34.4%	1.8%	\$20.81	Postsecondary nondegree award	110.1
Roustabouts, Oil and Gas	44	-54.6%	1.8%	\$16.05	No formal educational credential	123.5
Accountants and Auditors	44	-42.8%	1.7%	\$30.58	Bachelor's degree	93.1



Worker demographics 2021



- Hispanic workers (33%)
- Black or African-American workers (4%)
- Asian workers (1%)
- White workers (60%)
- Others (2%)

- Male workers (73%)
- Female workers (27%)

- 32% of the workforce is comprised of matured (aged 55 years or more) workers.

Report Contributors

This report was produced by the Purdue Center for Regional Development.



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Purdue Center for Regional Development

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