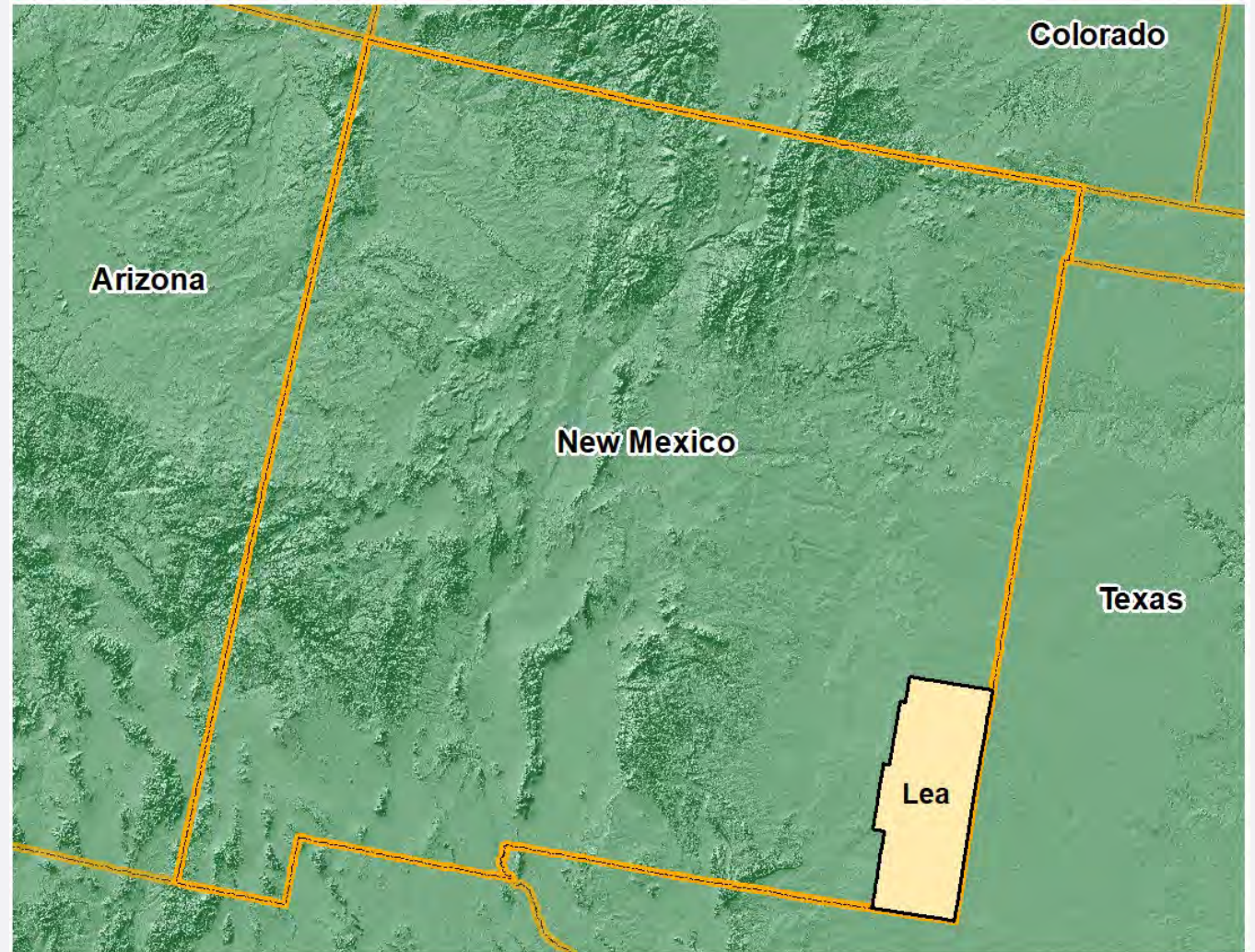


# Industry Cluster

Lea County, New Mexico

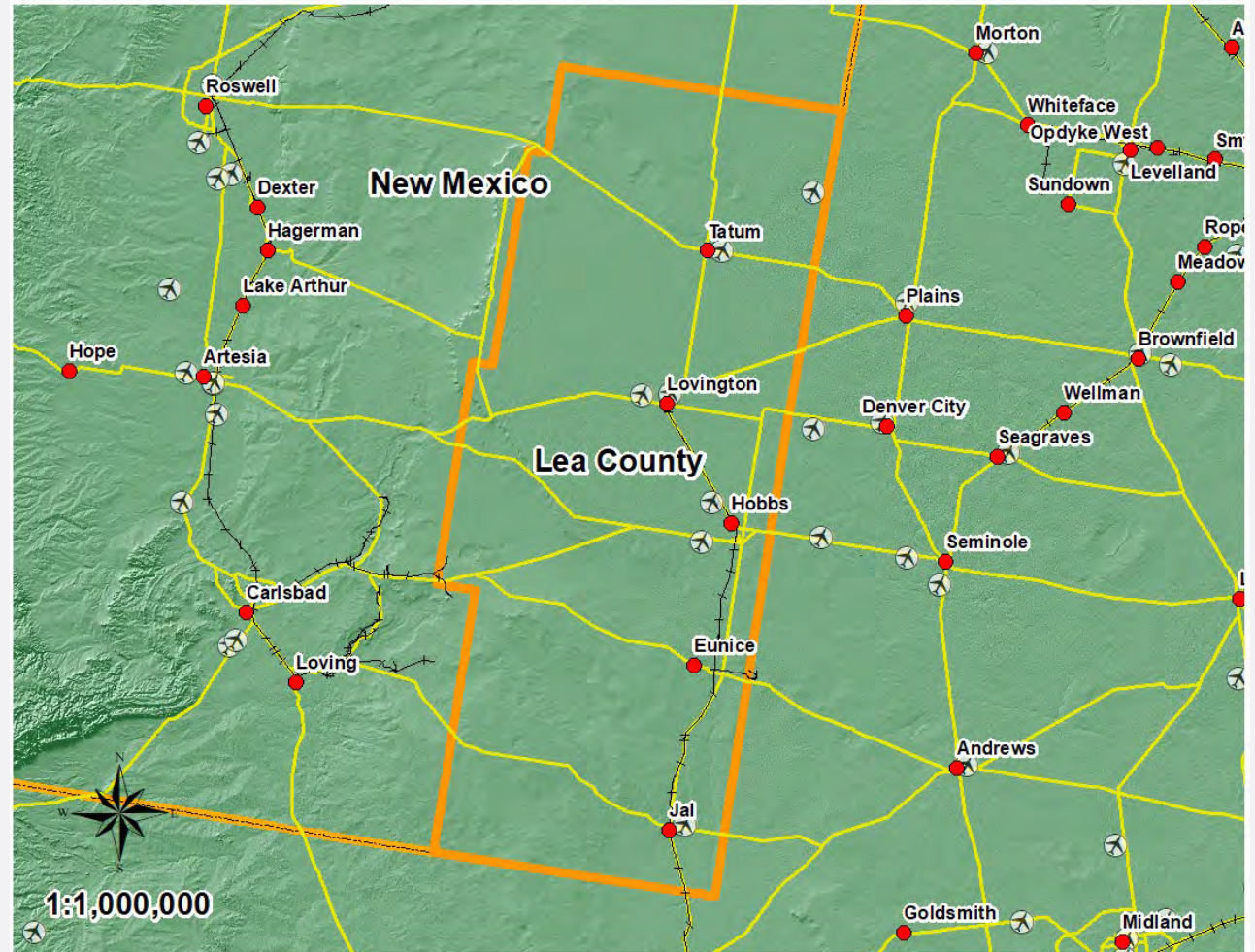


Cluster Drill-down Analysis  
February 2023



## Southeastern New Mexico Region

- Lea County





# Industry cluster drilldown

- 1. Mining**
- 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)
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	290	3	27	30	61	↑ 31
Industrial Sand Mining	44	0	0	0	44	↑ 44
Rail transportation	19	0	-2	-2	5	↑ 7
Potash, Soda, and Borate Mineral Mining	<10	0	-1	0	Insf. Data	-10
Support Activities for Nonmetallic Minerals (except Fuels) Mining	<10	0	0	0	Insf. Data	-1
Support Activities for Metal Mining	<10	0	0	0	Insf. Data	-1
Crushed and Broken Limestone Mining and Quarrying	<10	0	0	0	Insf. Data	↑ 1
All Other Nonmetallic Mineral Mining	<10	0	0	0	Insf. Data	↑ 1
Construction Sand and Gravel Mining	<10	0	-1	-1	Insf. Data	-1
Gold Ore Mining	<10	0	0	0	Insf. Data	↑ 2
Copper, Nickel, Lead, and Zinc Mining	<10	0	0	0	Insf. Data	↑ 1

Several mining sectors show <10 jobs.

Note: Upward arrow (↑) indicates regional competitiveness.




## Shift-Share Analysis 2021

### Industries that Outperformed

- 
- Industrial Sand Mining
  - Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing
  - Rail transportation
  - Gold Ore Mining
  - All Other Nonmetallic Mineral Mining
  - Copper, Nickel, Lead, and Zinc Mining
  - Crushed and Broken Limestone Mining and Quarrying

### Industries that Underperformed

- 
- Support Activities for Nonmetallic Minerals (except Fuels) Mining
  - Construction Sand and Gravel Mining
  - Support Activities for Metal Mining
  - Potash, Soda, and Borate Mineral Mining

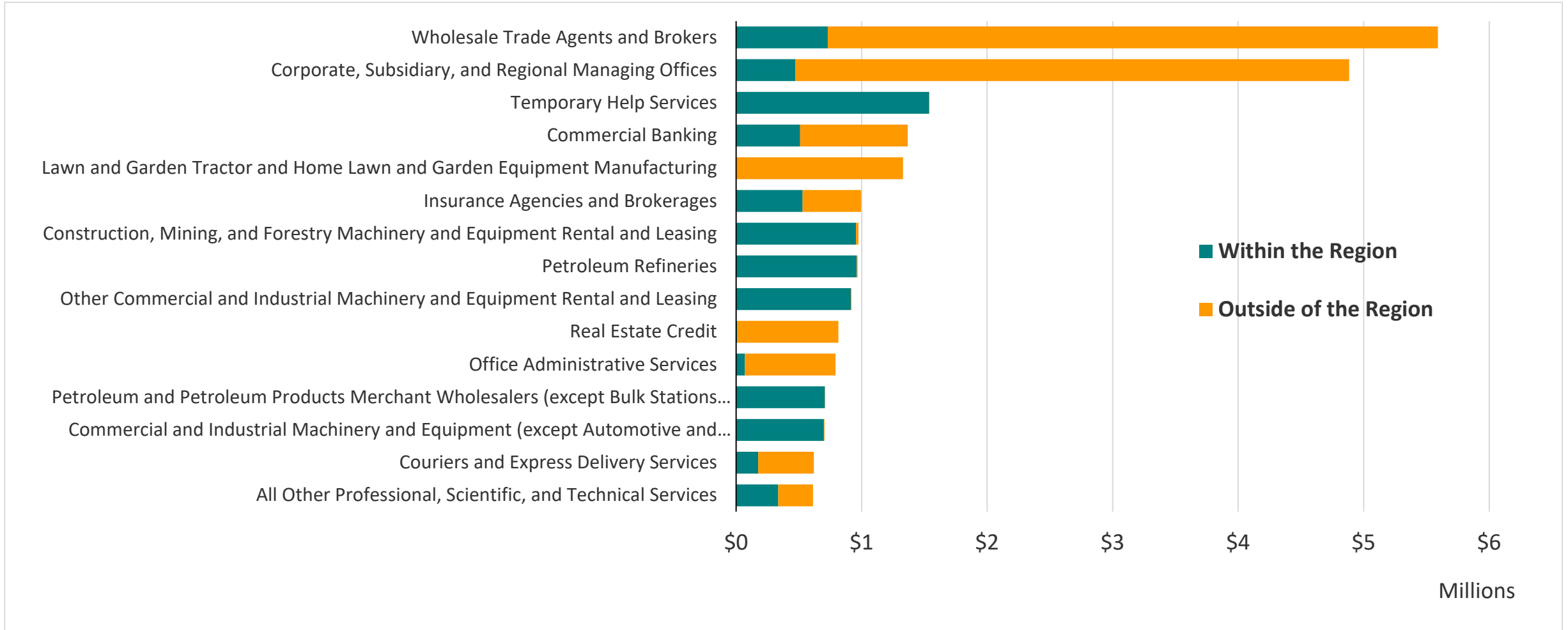


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Wholesale Trade Agents and Brokers	\$5.6	13.0%	87.0%
Corporate, Subsidiary, and Regional Managing Offices	\$4.9	9.6%	90.4%
Temporary Help Services	\$1.5	100.0%	0.0%
Commercial Banking	\$1.4	37.3%	62.7%
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing	\$1.3	0.0%	100.0%
Insurance Agencies and Brokerages	\$1.0	53.2%	46.8%
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$1.0	98.0%	2.0%
Petroleum Refineries	\$1.0	99.4%	0.6%
Other Commercial and Industrial Machinery and Equipment Rental and Leasing	\$0.9	99.5%	0.5%
Real Estate Credit	\$0.8	0.9%	99.1%
Office Administrative Services	\$0.8	8.7%	91.3%
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$0.7	99.8%	0.2%
Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	\$0.7	99.1%	0.9%
Couriers and Express Delivery Services	\$0.6	28.4%	71.6%
All Other Professional, Scientific, and Technical Services	\$0.6	54.7%	45.3%



# Leakage analysis 2021



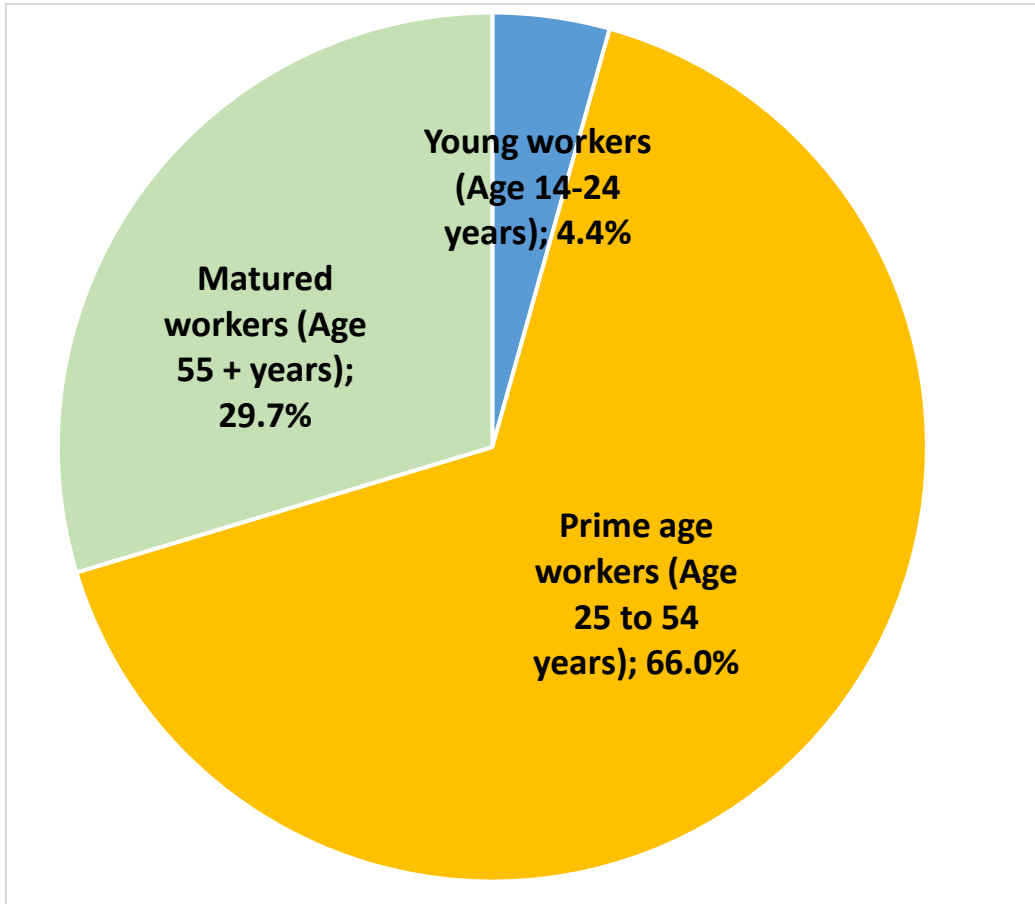




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Heavy and Tractor-Trailer Truck Drivers	22	39%	6.1%	\$23.55	Postsecondary nondegree award	110.1
Mobile Heavy Equipment Mechanics, Except Engines	21	68%	5.6%	\$27.12	High school diploma or equivalent	109.6
Counter and Rental Clerks	21	-18%	5.6%	\$14.17	No formal educational credential	100.3
General and Operations Managers	18	63%	4.9%	\$42.51	Bachelor's degree	82.2
Light Truck Drivers	17	4%	4.6%	\$19.21	High school diploma or equivalent	112.9
First-Line Supervisors of Non-Retail Sales Workers	15	52%	4.2%	\$23.24	High school diploma or equivalent	81.4
Laborers and Freight, Stock, and Material Movers, Hand	15	14%	4.0%	\$13.22	No formal educational credential	117.2
Customer Service Representatives	12	108%	3.2%	\$14.55	High school diploma or equivalent	96.4
Industrial Machinery Mechanics	12	198%	3.1%	\$27.68	High school diploma or equivalent	109.8
Operating Engineers and Other Construction Equipment Operators	10	227%	2.8%	\$23.36	High school diploma or equivalent	120.3
Dispatchers, Except Police, Fire, and Ambulance	<10	50%	0.6%	\$19.37	High school diploma or equivalent	95.1
Shipping, Receiving, and Inventory Clerks	<10	224%	0.8%	\$17.63	High school diploma or equivalent	109.1
Medical Secretaries and Administrative Assistants	<10	Insf. Data	0.1%	\$16.61	High school diploma or equivalent	93.1
Office and Administrative Support Workers, All Other	<10	17%	0.1%	\$20.85	High school diploma or equivalent	87.6
Office Clerks, General	<10	127%	1.9%	\$14.24	High school diploma or equivalent	102



## Worker demographics 2021



- Hispanic workers (40%)
- Black or African-American workers (3%)
- Asian workers (1%)
- White workers (53%)
- American Indian (1%)
  
- Male workers (80%)
- Female workers (20%)

- Almost 30% of the workforce is comprised of mated (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)
Specialized Freight (except Used Goods) Trucking, Local	893	9	16	25	223	↑ 198
Pipeline Transportation of Natural Gas	222	1	2	3	132	↑ 129
General Freight Trucking, Long-Distance, Truckload	215	3	14	17	8	-9
General Freight Trucking, Local	196	2	14	16	61	↑ 45
Couriers and Express Delivery Services	176	1	48	49	121	↑ 72
Specialized Freight (except Used Goods) Trucking, Long-Distance	76	3	-7	-5	-103	-99
General Freight Trucking, Long-Distance, Less Than Truckload	43	1	3	4	0	-4
Rail transportation	19	0	-2	-2	5	↑ 7
Other Support Activities for Road Transportation	16	0	0	0	5	↑ 4
Inland Water Freight Transportation	15	0	0	0	Insf. Data	↑ 10
Pipeline Transportation of Crude Oil	13	1	-1	0	-33	-32
Freight Transportation Arrangement	13	0	1	1	0	-1
All Other Transit and Ground Passenger Transportation	<10	0	-2	-2	Insf. Data	↑ 1
Local Messengers and Local Delivery	<10	0	4	4	Insf. Data	↑ 2

Note: Upward arrow (↑) indicates regional competitiveness.




## Shift-Share Analysis 2021

### Industries that Outperformed

- 
- Specialized Freight (except Used Goods) Trucking, Local
  - Pipeline Transportation of Natural Gas
  - Couriers and Express Delivery Services
  - General Freight Trucking, Local
  - Inland Water Freight Transportation
  - Rail transportation
  - Other Support Activities for Road Transportation
  - Local Messengers and Local Delivery

### Industries that Underperformed

- 
- Freight Transportation Arrangement
  - General Freight Trucking, Long-Distance, Less Than Truckload
  - General Freight Trucking, Long-Distance, Truckload
  - Pipeline Transportation of Crude Oil
  - Specialized Freight (except Used Goods) Trucking, Long-Distance

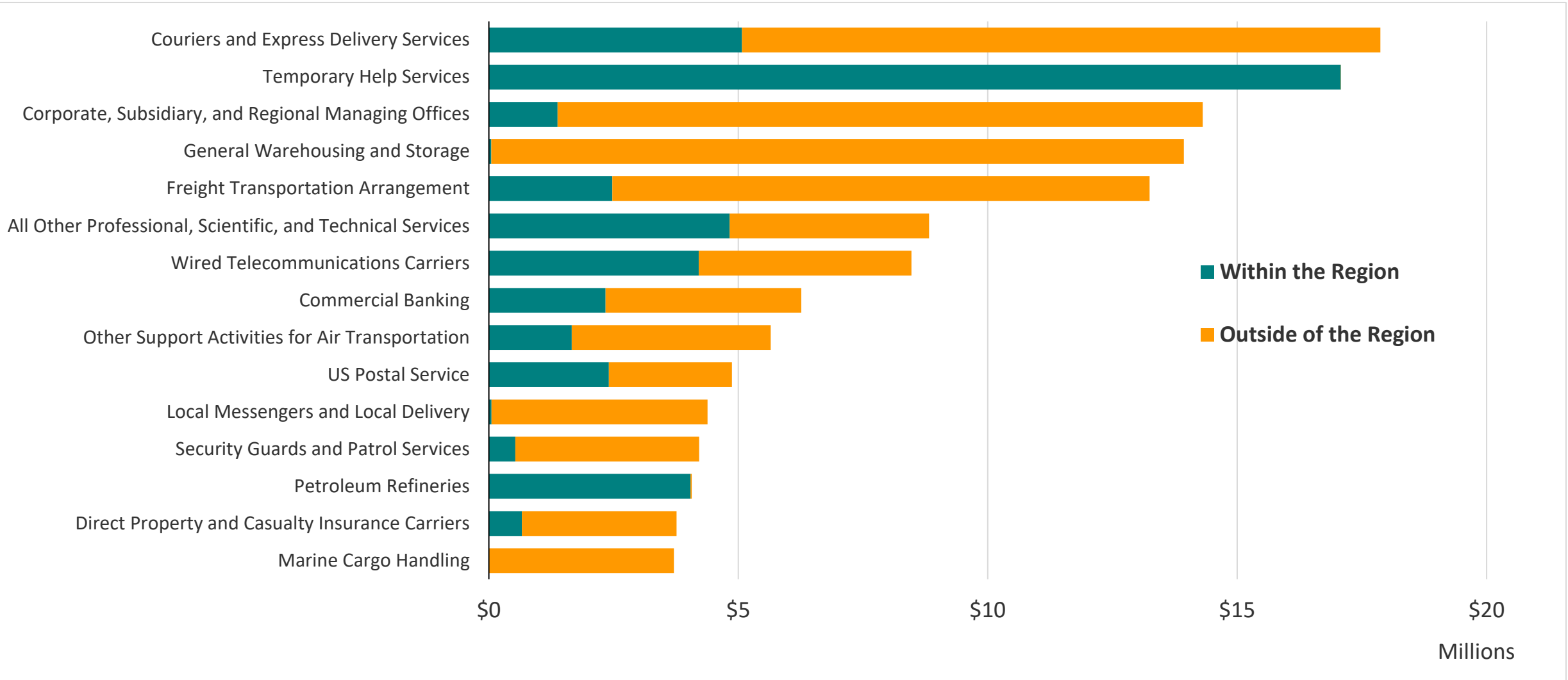


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Couriers and Express Delivery Services	\$17.9	28.4%	71.6%
Temporary Help Services	\$17.1	100.0%	0.0%
Corporate, Subsidiary, and Regional Managing Offices	\$14.3	9.6%	90.4%
General Warehousing and Storage	\$13.9	0.4%	99.6%
Freight Transportation Arrangement	\$13.2	18.7%	81.3%
All Other Professional, Scientific, and Technical Services	\$8.8	54.7%	45.3%
Wired Telecommunications Carriers	\$8.5	49.7%	50.3%
Commercial Banking	\$6.3	37.3%	62.7%
Other Support Activities for Air Transportation	\$5.6	29.4%	70.6%
US Postal Service	\$4.9	49.4%	50.6%
Local Messengers and Local Delivery	\$4.4	1.2%	98.8%
Security Guards and Patrol Services	\$4.2	12.6%	87.4%
Petroleum Refineries	\$4.1	99.4%	0.6%
Direct Property and Casualty Insurance Carriers	\$3.8	17.6%	82.4%
Marine Cargo Handling	\$3.7	0.0%	100.0%



# Leakage analysis 2021



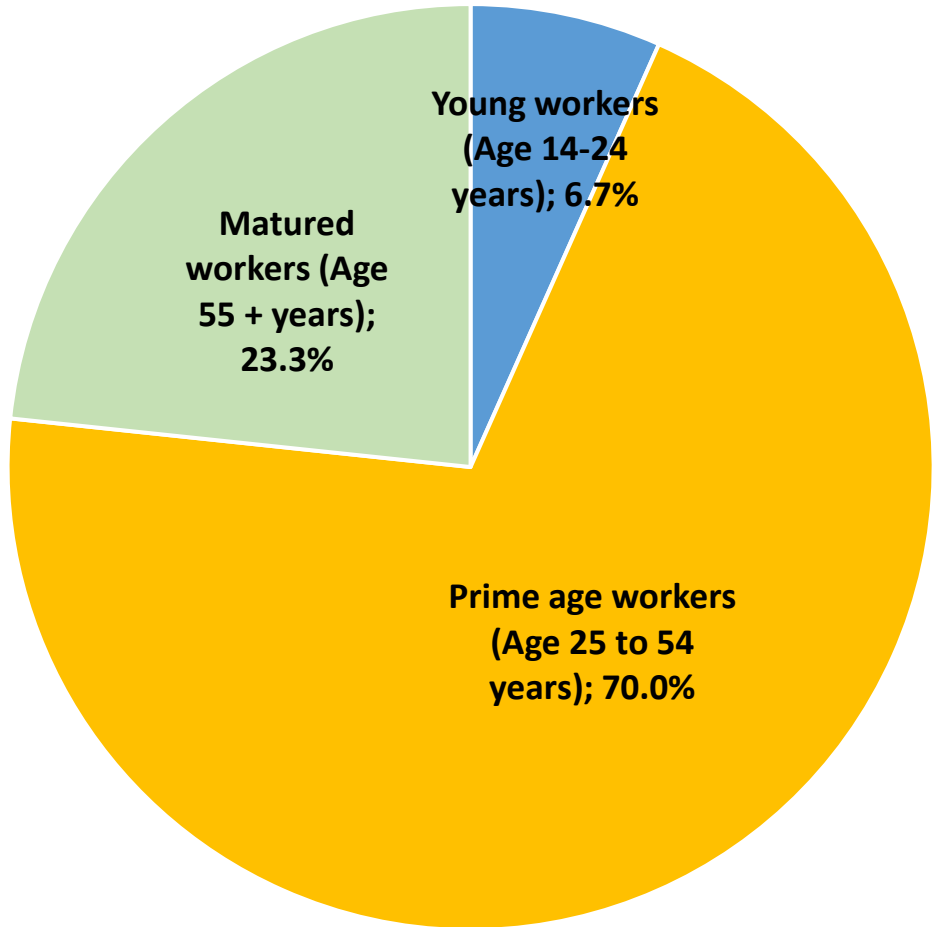
■ Within the Region  
 ■ Outside of the Region



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	999	1%	50.7%	\$23.55	Postsecondary nondegree award	110.1
Light Truck Drivers	104	95%	5.3%	\$19.21	High school diploma or equivalent	112.9
Laborers and Freight, Stock, and Material Movers, Hand	92	29%	4.7%	\$13.22	No formal educational credential	117.2
Couriers and Messengers	78	376%	4.0%	\$12.87	High school diploma or equivalent	105.3
Bus and Truck Mechanics and Diesel Engine Specialists	50	1%	2.5%	\$23.08	High school diploma or equivalent	114.6
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	41	36%	2.1%	\$18.09	High school diploma or equivalent	91.4
Dispatchers, Except Police, Fire, and Ambulance	37	43%	1.9%	\$19.37	High school diploma or equivalent	95.1
Gas Plant Operators	35	-14%	1.8%	\$30.75	High school diploma or equivalent	101.1
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	33	45%	1.7%	\$24.38	High school diploma or equivalent	93.8
Industrial Machinery Mechanics	33	116%	1.7%	\$27.68	High school diploma or equivalent	109.8
Office Clerks, General	27	86%	1.4%	\$14.24	High school diploma or equivalent	102
General and Operations Managers	27	45%	1.4%	\$42.51	Bachelor's degree	82.2
Petroleum Pump System Operators, Refinery Operators, and Gaugers	27	-16%	1.4%	\$45.37	High school diploma or equivalent	104
Managers, All Other	24	36%	1.2%	\$24.72	Bachelor's degree	84.5
Gas Compressor and Gas Pumping Station Operators	23	1106%	1.2%	\$37.90	High school diploma or equivalent	97.9



## Worker demographics 2021



- Hispanic workers (50%)
- Black or African-American workers (5%)
- Asian workers (2%)
- White workers (42%)
- American Indian (1%)
  
- Male workers (83%)
- Female workers (17%)

- Nearly one-quarter (23%) 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)
Support Activities for Oil and Gas Operations	3,718	63	-895	-832	-749	↑ 83
Crude Petroleum Extraction	1,577	40	-1,582	-1,542	-1,281	↑ 261
Oil and Gas Pipeline and Related Structures Construction	1,194	15	17	32	131	↑ 99
Drilling Oil and Gas Wells	1,007	7	-119	-113	518	↑ 631
Electrical Contractors and Other Wiring Installation Contractors	630	6	40	45	216	↑ 171
Natural Gas Extraction	369	6	-208	-202	-22	↑ 180
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	290	3	27	30	61	↑ 31
Gasoline Stations with Convenience Stores	262	3	2	4	74	↑ 69
Power and Communication Line and Related Structures Construction	235	4	72	76	-50	-127
Pipeline Transportation of Natural Gas	222	1	2	3	132	↑ 129
Plumbing, Heating, and Air-Conditioning Contractors	182	2	13	15	67	↑ 52
Natural Gas Distribution	174	2	-6	-5	48	↑ 52
Other Scientific and Technical Consulting Services	159	1	5	5	102	↑ 97
Other Heavy and Civil Engineering Construction	115	0	0	0	Insf. Data	↑ 107
Electric Power Distribution	113	2	-5	-2	-59	-56

Note: Upward arrow (↑) indicates regional competitiveness.



## Shift-Share Analysis 2021

### Industries that Outperformed

- Drilling Oil and Gas Wells
- Crude Petroleum Extraction
- Natural Gas Extraction
- Electrical Contractors and Other Wiring Installation Contractors
- Pipeline Transportation of Natural Gas
- Other Heavy and Civil Engineering Construction
- Oil and Gas Pipeline and Related Structures Construction
- Other Scientific and Technical Consulting Services
- Support Activities for Oil and Gas Operations
- Gasoline Stations with Convenience Stores
- Plumbing, Heating, and Air-Conditioning Contractors
- Natural Gas Distribution

### Industries that Underperformed

- Power and Communication Line and Related Structures Construction
- Electric Power Distribution

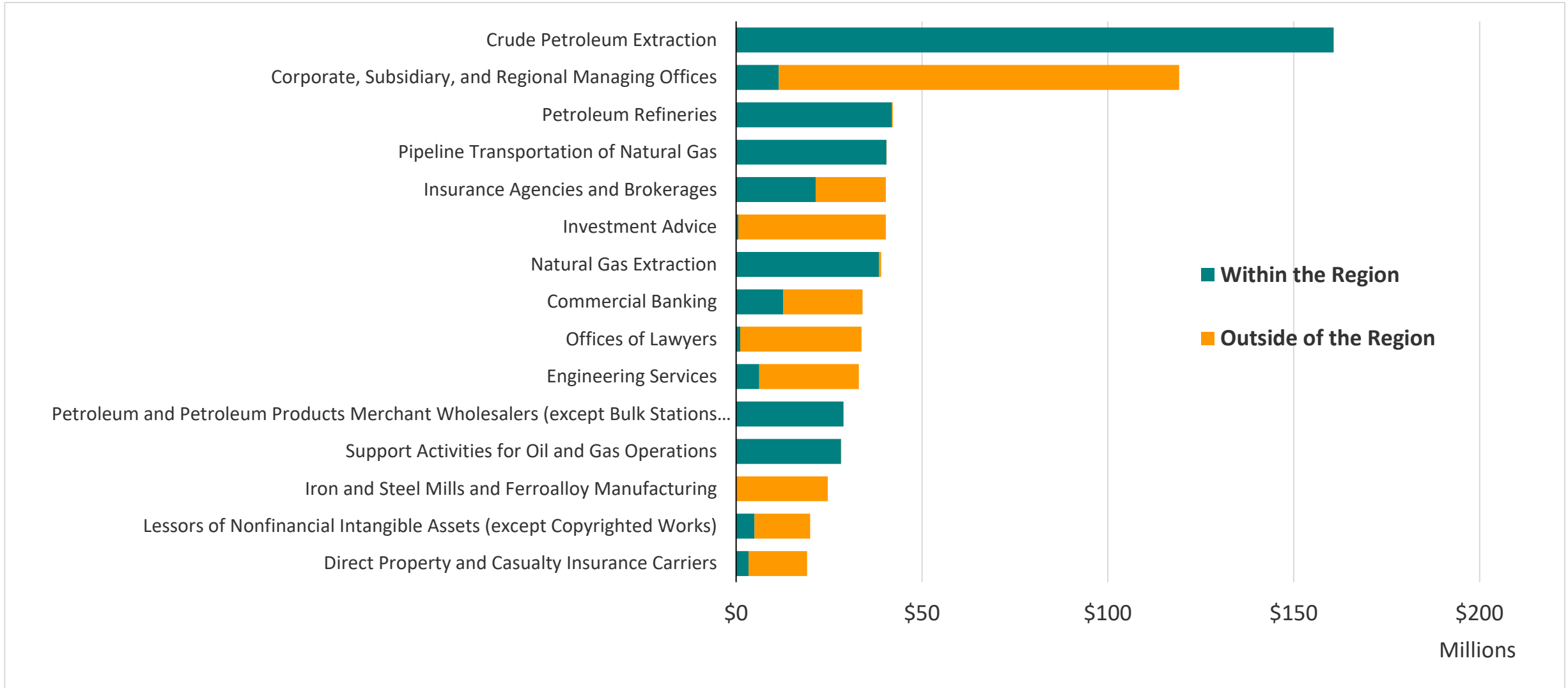


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Crude Petroleum Extraction	\$160.7	100.0%	0.0%
Corporate, Subsidiary, and Regional Managing Offices	\$119.2	9.6%	90.4%
Petroleum Refineries	\$42.2	99.4%	0.6%
Pipeline Transportation of Natural Gas	\$40.4	100.0%	0.0%
Insurance Agencies and Brokerages	\$40.3	53.2%	46.8%
Investment Advice	\$40.2	1.5%	98.5%
Natural Gas Extraction	\$39.0	98.5%	1.5%
Commercial Banking	\$34.0	37.3%	62.7%
Offices of Lawyers	\$33.7	3.2%	96.8%
Engineering Services	\$33.0	18.7%	81.3%
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$29.0	99.8%	0.2%
Support Activities for Oil and Gas Operations	\$28.2	100.0%	0.0%
Iron and Steel Mills and Ferroalloy Manufacturing	\$24.6	0.0%	100.0%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$19.9	24.7%	75.3%
Direct Property and Casualty Insurance Carriers	\$19.1	17.6%	82.4%



# Leakage analysis 2021

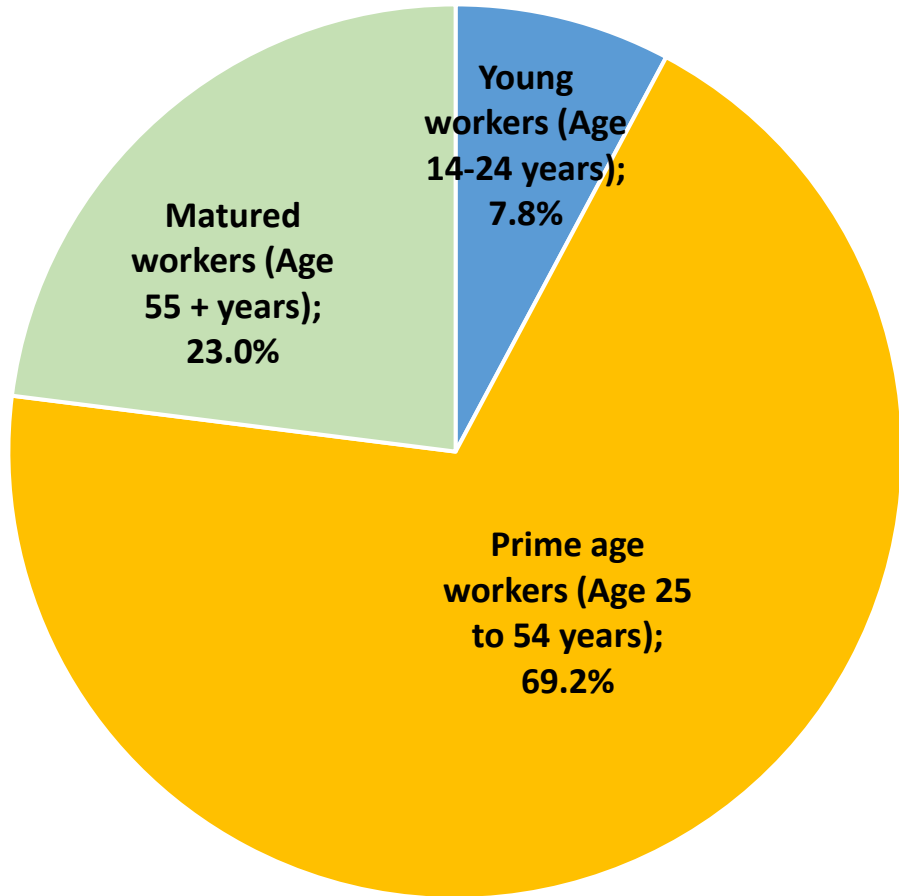




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Roustabouts, Oil and Gas	870	-36%	8.0%	\$17.09	No formal educational credential	123.5
Construction Laborers	684	32%	6.3%	\$14.62	No formal educational credential	131.9
First-Line Supervisors of Construction Trades and Extraction Workers	623	-2%	5.7%	\$29.22	High school diploma or equivalent	106.2
Managers, All Other	465	-23%	4.3%	\$24.72	Bachelor's degree	84.5
Service Unit Operators, Oil and Gas	450	-21%	4.1%	\$28.65	No formal educational credential	106.1
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	365	28%	3.4%	\$18.09	High school diploma or equivalent	91.4
General and Operations Managers	363	-1%	3.3%	\$42.51	Bachelor's degree	82.2
Electricians	362	43%	3.3%	\$28.74	High school diploma or equivalent	110.3
Wellhead Pumpers	359	-13%	3.3%	\$33.53	High school diploma or equivalent	115.1
Heavy and Tractor-Trailer Truck Drivers	347	2%	3.2%	\$23.55	Postsecondary nondegree award	110.1
Operating Engineers and Other Construction Equipment Operators	321	27%	3.0%	\$23.36	High school diploma or equivalent	120.3
Industrial Machinery Mechanics	244	79%	2.2%	\$27.68	High school diploma or equivalent	109.8
Cashiers	193	31%	1.8%	\$11.70	No formal educational credential	105.5
Property, Real Estate, and Community Association Managers	153	-38%	1.4%	\$30.89	High school diploma or equivalent	83.8
Laborers and Freight, Stock, and Material Movers, Hand	150	55%	1.4%	\$13.22	No formal educational credential	117.2



## Worker demographics 2021



- Hispanic workers (43%)
- Black or African-American workers (4%)
- Asian workers (1%)
- White workers (49%)
- American Indian (1%)
- Two or More Races (1%)
  
- Male workers (82%)
- Female workers (18%)

- Nearly one-quarter (23%) of the workforce is comprised of matured (aged 55 years or more) workers.

# Report Contributors

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



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seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

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