NORTH CENTRAL INDIANA REGIONAL PLANNING COUNCIL

CASS, CLINTON, FULTON, HOWARD, MIAMI & TIPTON

APPENDIX

REGIONAL ECONOMIC DEVELOPMENT PLAN
SEPTEMBER 2017

SET COMMITTEE

CASS COUNTY			
Christy	**Householder**	Economic Development	Cass
Jim	Sailors	Local Government	Cass
Arin	Shaver	City/County Planning	Cass
Becki	Harris	Logan's Landing	Cass
Elaine	Zeider	Area Five	Cass
Bob	Dunderman	Municipal Utility	Cass
Dave	Arnold	Education	Cass
Ide	Vaneen	Local Government	Cass
Bishop	Grover	Local Government	Cass
Jeff	LeDonne	Local Government	Cass
John	Jackson	Local Government	Cass
Rose	Jackson	Local Government	Cass
Larry	Lowry	Veteran Services	Cass
Fred	Seehase	Agriculture	Cass
FULTON COUNTY			
Randy	Sutton	Local Government	Fulton
Terry	**Lee**	Economic Development	Fulton
Sarah	Reese	Rochester Main St	Fulton
Amy	Roe	Chamber of Commerce	Fulton
Amy	Beechy	Economic Development	Fulton
Lori	Hurst	Local Government	Fulton
HOWARD COUNTY			
Charlie	Sparks	Economic Development	Howard
Scott	Deyoe	Business Owner	Howard
Stan	Ortman	Local Government	Howard
Tyler	Moore	Business Owner	Howard
Dean	Despinoy	GRDA	Howard
Jolene	Rule	Greentown Main St	Howard
Mike	**McCool**	Economic Development	Howard
Mark	Lantz	Local Government	Howard
Misty	Knisely	Economic Development	Howard

Bold indicates Core Team

CLINTON COUNTY			
Shan	**Sheridan**	Chamber of Commerce	Clinton
Don	Stock	Resident	Clinton
MIAMI COUNTY			
Dick	Wiles	Resident	Miami
Ethan	Manning	Local Government	Miami
Jim	**Tidd**	Economic Development	Miami
Josh	Francis	Local Government	Miami
Steve	Reiff	Resident	Miami
Marilyn	Jackson	Local Government	Miami
Steve	Dobbs	Business Owner	Miami
Tom	McKaig	Education	Miami
Jim	Yates	Economic Development	Miami
Brooke	Robertson	Economic Development	Miami
Sandy	Chittum	Chamber of Commerce	Miami
Richard	Hostetler	Regional Sewer District	Miami
REGION-WIDE			
Susan	Sciame-Giesescke	Indiana University Kokomo	Regional
Cathy	**Valcke**	Indiana University Kokomo	Regional
Kathy	**Burns**	Tecumseh Area Partnership	Regional
Michelle	**Simmons**	Ivy Tech	Regional
Susan	Davis	IN Small Business Development	Regional
Rodni	Lytle	Ivy Tech	Regional
Mike	Karickhoff	State Representative	Regional
Douglas	Schwartz	GRDA	Regional
Tim	Calhoon	GRDA	Regional
Amy	Pate	Real Estate Association	Regional
Gerry	White	OCRA	Regional
Jennifer	Vanderburg	OCRA	Regional
TIPTON COUNTY			
Don	Havens	Local Government	Tipton
Vicki	Warner	Chamber of Commerce	Tipton
Nathan	**Kring**	Economic Development	Tipton
Tami	Brown	Agriculture	Tipton

LETTERS OF ENGAGEMENT

CASS COUNTY COMMISSIONERS

Cass County Government Building
Room 200, 200 Court Park
Logansport, Indiana 46947
(574) 753-7770 Fax: (574) 753-4398

James L. Sailors
Ralph Anderson
Jeff LeDonne

May 18, 2017

Jim Sailors
Cass County Commissioners
200 Court Park
Logansport, IN 46947

Dear Mr. Ray

I am pleased to send this letter of commitment to the Stronger Economics Together (SET) Program. Cass County fully supports the North Central Indiana Regional Planning Council and its role in helping our rural communities/counties work together.

Cass County understands our region is only as strong as our communities. The goals and objectives outlined in the plan are consistent with our local strategies and build upon the past efforts to strengthen the region. For this reason, we offer our continued support for the implementation of the SET High-Quality plan in the form of both human and financial resources.

I look forward to the successful implementation of the SET initiatives

Sincerely,

Jim Sailors

Jim Sailors
Cass County Commissioners

May 15, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of commitment to participate as an active and engaged regional team member in the implementation of the Stronger Economics Together (SET) plan. Clinton County is committed to working with our regional partners to pursue strategies and activities that advance the advance manufacturing and agriculture sectors and build on the existing quality of life amenities across the region.

The goals and objectives outlined in the SET document are critical to the long-term growth and sustainability of our communities and region. As a participant of the planning process, I believe this strategic plan will serve as a foundation to strengthen our local and regional economies.

Clinton County strongly supports the SET initiative and looks forward to the implementation of the plan.

Sincerely,

Jeff Chyhoweth
Clinton County Council

May 15, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of commitment to participate as an active and engaged regional team member in the implementation of the Stronger Economics Together (SET) plan. Fulton County is committed to working with our regional partners to pursue strategies and activities that advance the advance manufacturing and agriculture sectors and build on the existing quality of life amenities across the region.

The goals and objectives outlined in the SET document are critical to the long-term growth and sustainability of our communities and region. As a participant of the planning process, I believe this strategic plan will serve as a foundation to strengthen our local and regional economies.

Fulton County strongly supports the SET initiative and looks forward to the implementation of the plan.

Sincerely,

Lorie L. Hurst

Lorie L. Hurst
Fulton County Council

Howard County Board of Commissioners
Howard County Administration Center
220 N. Main Street • Kokomo, IN 46901
Phone 765-456-2234 • Fax 765-456-2803
www.co.howard.in.us

Paul Wyman
District 1
1533 W. Lincoln Road
Kokomo, IN 46902
765-419-1021

Tyler O. Moore
District 2
517 Tumbleweed Drive
Kokomo, IN 46901
765-860-8745

Robert Brad Bray
District 3
4807 Ridge Road
Kokomo, IN 46901
765-437-4947

Lawrence R. Murrell
County Attorney
220 N. Main
Kokomo, IN 46901
765-456-1418

May 31, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of commitment to participate as an active and engaged regional team member in the implementation of the Stronger Economics Together (SET) plan. Howard County is committed to continue working with our regional partners to pursue strategies and activities that further the advancement of our manufacturing and agriculture sectors and build on the existing quality of life amenities across the region.

The goals and objectives outlined in the new SET document are critical to the long-term growth and sustainability of our communities and region. As a participant of the planning process, Howard County believes this strategic plan will serve as a foundation to strengthen our local and regional economies.

The Howard County Board of Commissioners strongly supports the SET initiatives and looks forward to the implementation of its plan.

Sincerely,

Tyler Moore
Howard County Commissioner

Miami County
25 North Broadway
Peru, Indiana 46970
(765) 472-3901
FAX (765) 472-1412

Commissioners
Josh Francis
Larry West
Jerry Hamman
Pat Roberts - Attorney

May 15, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of commitment to participate as an active and engaged regional team member in the implementation of the Stronger Economics Together (SET) plan. Miami County is committed to working with our regional partners to pursue strategies and activities that advance the advance manufacturing and agriculture sectors and build on the existing quality of life amenities across the region.

The goals and objectives outlined in the SET document are critical to the long-term growth and sustainability of our communities and region. As a participant of the planning process, I believe this strategic plan will serve as a foundation to strengthen our local and regional economies.

Miami County strongly supports the SET initiative and looks forward to the implementation of the plan.

Sincerely,

Josh Francis

Josh Francis
Miami County Commissioner

October 4, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of commitment to participate as an active and engaged regional team member in the implementation of the Stronger Economics Together (SET) plan. Tipton County is committed to working with our regional partners to pursue strategies and activities that advance the advance manufacturing and agriculture sectors and build on the existing quality of life amenities across the region.

The goals and objectives outlined in the SET document are critical to the long-term growth and sustainability of our communities and region. As a participant of the planning process, I believe this strategic plan will serve as a foundation to strengthen our local and regional economies.

Tipton County strongly supports the SET initiative and looks forward to the implementation of the plan.

Sincerely,

Ph.D.

James Mullins
Tipton County Commissioner

INDIANA UNIVERSITY
KOKOMO

OFFICE OF THE CHANCELLOR

May 23, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd. Ste 204
Peru, IN 46970

Dear Mr. Ray,

It is my pleasure to write this letter of support for the Stronger Economics Together (SET) Program. Indiana University Kokomo is a leading advocate of initiatives that bring together public, private and educational entities to build stronger local and regional economies.

Indiana University Kokomo has participated in the SET planning process is committed to the implementation of the strategies outlined in the final document. We have the experience necessary to advance the leadership institute and the quality of life initiatives. Our extensive network within the region and across the State can be leveraged to bring communities and counties together to develop a stronger future.

Indiana University Kokomo strongly supports the North Central Indiana Regional Planning Council's effort and is a committed partner.

Sincerely,

Susan Sciame-Giesecke

Susan Sciame-Giesecke, Ph.D.
Chancellor

2300 S. Washington Street P.O. Box 9003 Kokomo, IN 46904-9003 (765) 455-9225 fax (765) 455-9444 www.iuk.edu

June 6, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Ivy Tech Community College-Kokomo Region enthusiastically offers this letter of commitment to serve as an active and engaged regional team member in the implementation of the North Central Indiana Regional Planning Council's Stronger Economics Together (SET) plan. Ivy Tech offers educational and workforce training opportunities in each of the six North Central Indiana counties and believes the Community College will play a vital role in achieving the goals outlined in the SET plan.

Ivy Tech Community College has a long history of working with the regional partners and seeks to continue its engagement for the long-term growth and sustainability of our communities and region. The strategic objectives related to the employer/educator council, agriculture council, and the Center of Excellence for Advanced Manufacturing are aligned with Ivy Tech's core mission. As participants of the planning process, we believe this strategic plan will serve as a foundation to strengthen our local and regional economies.

Ivy Tech is committed to offer its resources to the successful implementation of the SET initiative and is excited to move this endeavor forward.

Sincerely,

Michelle Simmons
President, Kokomo Campus
Ivy Tech Community College

Kevin Bostic
President, Logansport Campus
Ivy Tech Community College

Indiana Manufacturers Association, Inc.
101 West Washington St., Suite 1050 East • Indianapolis, IN 46204
317-632-2474 • 800-462-7762 • Fax: 317-231-2320 • www.imaweb.com

June 12, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray:

I write to offer my support of the North Central Indiana Regional Planning Council's Stronger Economies Together plan. IMA is exclusively focused on Indiana's manufacturing sector and advocating for a business climate that creates, protects, and promotes quality manufacturing jobs in Indiana. It is encouraging to see North Central Indiana engaging in targeted strategies to build on the region's key manufacturing clusters.

IMA is prepared to offer its support as North Central Indiana promotes the region's advanced manufacturing resources and capacity, develops a supply chain strategy, and creates a Center of Excellence for Advance Manufacturing. To compete globally, Indiana and its communities must prepare and deliver a highly-skilled workforce to meet the demands of today's and tomorrow's manufacturers. IMA is committed to partnering with the NC Region to ensure that the next generation of technologies is manufactured here in Indiana.

IMA appreciates the opportunity to participate in the implementation Stronger Economies Together plan.

Sincerely,

Brian Burton
President & CEO

May 15, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

Please accept this letter of support and commitment to the North Central Stronger Economies Together plan. Indiana Farm Bureau promotes agriculture through public education and engagement, and serves as an advocate for agriculture and rural needs. We are excited to see the North Central region pursuing strategies to strengthen and grow the agriculture sector.

Farm Bureau has the expertise and resources to help the region achieve the goals and objectives outlined in the SET document. We will happily assist with the formation of the regional ag council and will collaborate on the agricultural supply chain study. Farm Bureau is also interested in the connecting of the agriculture industrial sector with local educational institutions. We feel this strategic plan will serve to strengthen the region and be a model for other regions within Indiana.

Please accept our support of this very important initiative.

Sincerely, Paul Dorsey

Paul Dorsey, Clinton County Farm Bureau President

Indiana
SMALL BUSINESS
DEVELOPMENT CENTER

June 14, 2017

Mr. Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray:

I am writing to offer my support of the North Central Indiana Regional Planning Council's Stronger Economies Together (SET) Program. The Hoosier Heartland Indiana Small Business Development Center (ISBDC) has a long history of working closely with community leaders and business owners to provide impactful services that help small businesses grow and be sustainable. The Goals and Objectives outlined within the SET plan are well aligned with our mission.

The ISBDC supports economic development strategies that start and grow small businesses. We have resources and expertise to assist the North Central's efforts to develop an agricultural strategy and to support and grow the advanced manufacturing sector. Our connectivity to a diverse group of resources spans the region and the State can be leveraged to ensure successful implementation.

The ISBDC is excited to continue our working relationship with the North Central Regional Planning Council. Thank you for including us in the important endeavor.

Sincerely,

Susan B. Davis

Susan B. Davis
Regional Director
Hoosier Heartland ISBDC

FIAT CHRYSLER AUTOMOBILES

August 1, 2017

Steven Ray, Executive Director
North Central Indiana Regional Planning Council
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

On behalf of FCA US LLC (FCA), please accept our support for the North Central Indiana Regional Planning Council (NCIRPC) "Stronger Economies Together" (SET) initiative. FCA US is one the region's largest auto manufacturers and we continually face workforce challenges, chief among these is the skilled workforce availability. To maintain a competitive advantage, industries and communities must work collaboratively to ensure there is a qualified and skilled workforce for the jobs of today and tomorrow.

The NCIRPC's regional goals of promoting the advanced manufacturing resources along with creating a Center of Excellence for Advance Manufacturing are key strategies to grow the region's economy.

FCA US looks forward to working with the North Central Indiana Regional Planning Council and its partners for the successful implementation of the SET plan. We will actively participate in the regional efforts to promote advance manufacturing as a viable career path.

Thank you for your consideration.

Sincerely,

Mark McLean

Mark McLean
Senior Manager, Human Resources
FCA Kokomo Transmission Plant.

Greater Kokomo

May 19, 2017

Steven Ray

NC RPC

1525 W Hoosier Blvd Ste 204

Peru, IN 46970

Dear Mr. Ray

The North Central Indiana Economic Development Partnership (EDP) comprised of economic development organizations from Cass, Clinton, Fulton, Howard, Miami and Tipton counties pledges its support and commitment to the implementation of the Stronger Economics Together (SET) plan. The EDP has a long history of working together to advance local and regional projects and is committed to providing financial and professional services to ensure the SET goals are pursued and objectives are achieved.

All of our members have an awareness of that regional strategies are key to overall economic growth. We will continue to participate in the regional efforts as conveners of our elected officials and business leaders; facilitators of technical and financial resources; and champions of initiatives to advance the manufacturing and agriculture sectors and the quality of life amenities within the region

The EDP will use the High-Quality SET plan to strengthen regional relationships and develop stronger more diverse local and regional economies.

Sincerely,

Michael McCool, Chair

North Central Indiana Economic Development Partnership

Region 4 WORKFORCE Board
Tecumseh Area Partnership, Inc.

April 5, 2016

Kathy Burns
Tecumseh Area Partnership dba Region 4 Workforce Board
976 Mezzanine Drive Suite C
Lafayette, IN 47905

Dear Mr. Ray,

I am pleased to send this letter of commitment to participate in the Stronger Economics Together (SET) Program. I am committed to becoming a regional team member and helping our rural communities/counties work together in developing and implementing economic growth that builds on current and emerging strengths, these include:

- Awareness of that our regional strategies are key to overall economic growth
- Willing to examine new possible economic activities to strengthen our communities
- Committed to gathering guidance and suggestions from diverse sources
- Observing new possible strategies and outcomes for the future of our region
- I am willing to participate and work through the SET planning process as a regional team and utilize the High Quality regional economic development Plan

The Region 4 Workforce Board is committed to promoting and supporting skills development and lifelong learning as a means of achieving economic success and improving the quality of life of our regional citizenry. Our mission meshes well with the scope of this project and I am looking forward to supporting this endeavor.

Sincerely,

Kathleen J. Burns

Kathy Burns
Regional Business Consultant

RACI
REALTORS® Association of Central Indiana

1620 E Hoffer St | Kokomo, IN 46902
(765) 457-0089 | info@raci.org

June 1, 2017

Mr. Steven Ray, Executive Director
North Central Indiana Regional Planning Council
1525 West Hoosier Blvd., Suite 204
Peru, IN 46970

Dear Mr. Ray:

The REALTORS Association of Central Indiana (RACI) is an independent not-for-profit organization, with a mission to enhance the opportunity of its members to provide cooperative, professional, ethical real estate services to the community while achieving their business objectives.

Our organization provides programs and services that strengthen our member agencies and the communities in which we serve. Through our community service activities, our members work closely with elected officials and community leaders to develop and complete projects that enhance the quality of life, as well as, promote and support economic development projects and initiatives to achieve more sustainable communities.

It is our understanding that the North Central Indiana Stronger Economies Together strategic plan has identified a goal to enhance the quality of life across the region and to promote talent attraction through targeted housing initiatives. We believe this regional goal aligns with the mission of RACI and its members. We strongly support and want to be an active participate in achieving this goal.

We appreciate learning of your proposed initiative and how it will improve our neighborhoods, communities and the region. RACI looks forward to serving North Central Indiana and bringing its expertise and insights to the housing market discussions.

Sincerely,

Amy Pate
Executive Vice President

COMMUNITY FOUNDATION
Serving Howard, Clinton & Carroll Counties
215 W. Sycamore Street
Kokomo, IN 46901
Phone: (765) 454-7298
(800) 964-0508
Fax: (765) 868-4123

May 15, 2017

Mr. Steven Ray, Executive Director
North Central Indiana Regional Planning Council
1525 West Hoosier Blvd., Suite 204
Peru, IN 46970

Dear Mr. Ray:

The Community Foundation of Howard County serves to connect people and resources to produce a positive and sustainable change within our communities. Our core values of Stewardship, Open Door, Service to Donors and Service to Community guide our organization and the work we do.

We understand that Howard and Clinton counties are founding members of the North Central Indiana Regional Planning Council and are engaged in the Stronger Economies Together initiative to strengthen the capacity of our communities. The Community Foundation of Howard strongly supports such activities and is an able partner to advance the goals and objectives outlined in the strategic plan.

Our organization provides support for programs and services that demonstrate community benefit in the following areas: Health & Medical, Social Services, Education, Cultural Affairs, Civic Affairs, and Community Beautification. The regional goals and objectives regarding education and quality of life are two key areas of interest for the Foundation. We believe we can bring resources to advance the regional effort at the local level to promote the proposed projects and achieve a more sustainable region. We strongly support and want to be an active participate in achieving this goal.

Thank you for your consideration. The Community Foundation of Howard County looks forward to collaborating with the North Central Indiana Regional Planning Council.

Sincerely,

Hilda G. Burns

Hilda G. Burns, President

Logansport Memorial Hospital

June 13, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray,

Please accept this letter of support of the North Central Indiana Regional Planning Council's Stronger Economies Together (SET) Program. Logansport Memorial Hospital understands the value of regionalism as providers of health care and support services to North Central Indiana.

Logansport Memorial has several ongoing local health and wellness initiatives to promote a higher quality of life for Cass County's nearly 39,000 residents. Logansport Memorial will actively partner with the NCIRPC to plan, develop and promote regional strategies to improve the health and economic conditions within Cass County and region. Healthy communities are vital to the sustainability of our economies and we will gladly support the SET plan.

I look forward to collaborating with the North Central Regional Planning Council. Thank you for your consideration.

Sincerely,

Perry Gay, President and Chief Executive Officer
Logansport Memorial Hospital

1101 Michigan Avenue • Logansport, IN 46947
574.753.7541 • 800.243.4512
www.logansportmemorial.org

GRISSOM REGIONAL DEFENSE ALLIANCE

May 1, 2017

Steven Ray, Executive Director
North Central Indiana Regional Planning Council
1525 West Hoosier Blvd. Suite 204
Peru, IN 46970

Dear Mr. Ray:

The Grissom Regional Defense Alliance (GRDA) is offering its support to the NCIRPC Stronger Economies Together Initiative (SET). The GRDA is a volunteer organization dedicated to enhancing regional cooperation for continued defense growth and development in North Central Indiana. GRDA is comprised of retired military and local community leaders from four North Central Indiana counties, including Cass, Howard and Miami, serving as the civil advocate for continued defense growth both inside the Grissom Air Reserve Base (GARB) and outside at the Grissom Aeroplex.

Several members of the GRDA have participated in the SET civic forums and working sessions. GRDA believes this effort aligns with our long-term strategies to further the development of the GARB and the Grissom Aeroplex. With the focus to Protect, Grow, Pursue and Educate, relative to Grissom and the defense industry, the GRDA will partner with the NCIRPC to advance the regional efforts through public outreach, community education, support of public meetings, and advocacy.

We have a common goal to enhance the economic sustainability of our communities. We will actively participate and support the Stronger Economies Together Initiative. Thank you for your consideration.

Sincerely,

Dean Despinoy, Ret. Brigadier General
GRDA Chairman

IARC
The gateway to regional development in Indiana

101 West Ohio Street, Suite 1575
Indianapolis, Indiana 46204
(317) 829-3658
Fax: (317) 684-3713
www.iarc.cc

June 13, 2017

Steven Ray, Executive Director
NCIRPC
1525 W Hoosier Blvd, Ste 204
Peru, IN 46970

Dear Mr. Ray

The Indiana Association of Regional Councils (IARC) is eager to support of the North Central Indiana Regional Planning Council's Stronger Economies Together (SET) Program. IARC has supported the formation of the NCIRPC for nearly ten years and we are excited to see the region's growth and success. The SET plan will serve as a guide to move the organization and region beyond its start-up phase and into maturity and IARC will continue to be an active resource.

IARC is available to serve and support the Regional Leadership Development initiative. Many of our member organizations date back to the late 1960's and can provide a wealth of knowledge relative to regionalism. IARC believes the North Central Indiana Regional Leadership Development initiative can serve as a model for unserved or underserved regions across the State. IARC will happily serve as an engaged partner in the implementation of this objective.

We look forward to working with the North Central Regional Planning Council. Thank you for your consideration.

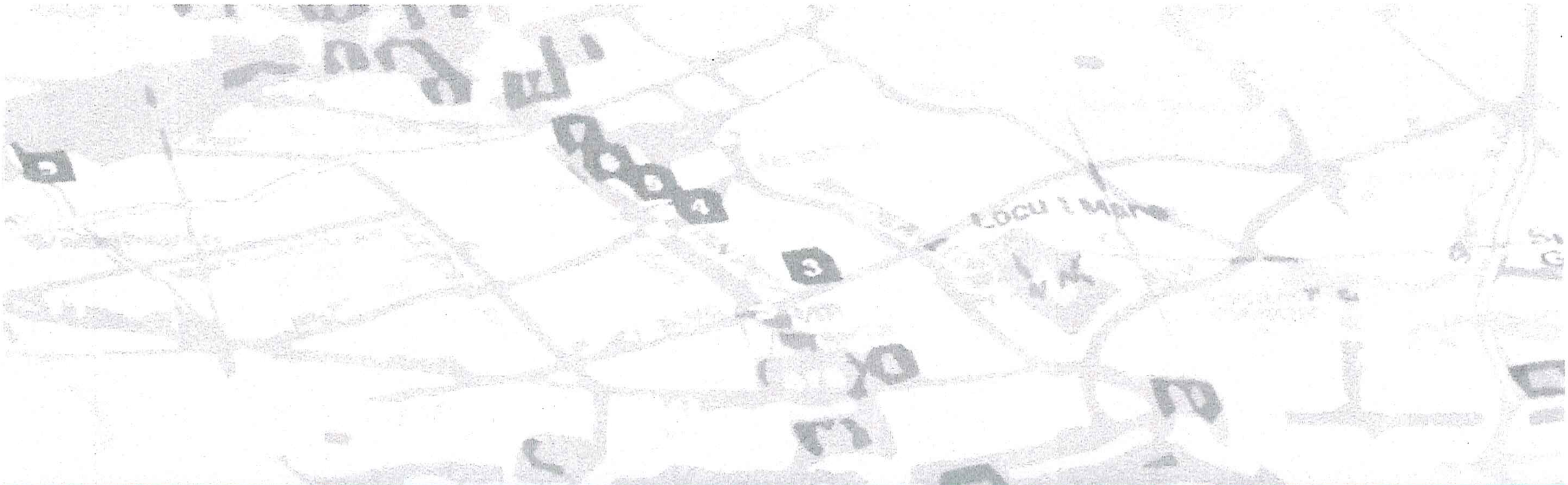
Sincerely,

Theresa Criss-Hartwig, Executive Director
Indiana Association of Regional Councils

REGIONAL DATA
AGRI-INDUSTRY &
ADVANCED MANUFACTURING

North Central Indiana Regional Planning Comission Industry Cluster Data - 2010 - 2015

Group	2010 Jobs	2015 Jobs	Jobs Rank (2015)	% Change Jobs	Earnings	Earnings Rank	Earnings Per Worker	Establishments	Earning Per Estab	Earning Per Estab Rank	Job Change	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect	2010 LQ	2015 LQ	Percent Change LQ	HHI
Advanced Materials	7,340	7,111	4	(3%)	$552,749,354	2	$77,736	107	$5,190,135	4	(230)	(134)	668	534	(764)	2.42	2.28	(6%)	0.299
Agribusiness, Food Processing And Technology	10,187	10,485	2	3%	$448,122,276	3	$42,740	224	$2,002,781	10	297	(384)	927	543	(245)	3.25	3.33	2%	0.216
Apparel And Textiles	193	215	22	11%	$5,235,555	22	$24,395	18	$290,864	22	21	(2)	18	15	6	0.25	0.27	8%	0.319
Arts, Entertainment, Recreation And Visitor Industries	1,811	1,778	11	(2%)	$33,437,275	16	$18,810	81	$415,370	19	(33)	32	165	197	(230)	0.44	0.41	(7%)	0.278
Biomedical/Biotechnical (Life Sciences)	6,971	7,279	3	4%	$330,119,589	4	$45,350	168	$1,964,998	11	308	(88)	634	546	(238)	0.87	0.88	1%	0.315
Business And Financial Services	5,272	5,143	5	(2%)	$201,112,252	6	$39,107	485	$414,878	20	(129)	132	480	611	(741)	0.42	0.38	(9%)	0.295
Chemicals	740	853	15	15%	$59,298,465	13	$69,481	40	$1,501,227	13	113	(6)	67	61	52	0.60	0.67	11%	0.222
Computer & Electronic Product Mfg	534	414	19	(22%)	$30,992,575	18	$74,915	11	$2,883,030	6	(120)	(70)	49	(21)	(99)	0.79	0.67	(16%)	0.451
Defense And Security	1,620	1,577	12	(3%)	$51,140,692	14	$32,434	47	$1,099,800	14	(43)	(7)	147	140	(183)	0.38	0.35	(6%)	0.231
Education And Knowledge Creation	583	605	17	4%	$10,982,313	21	$18,143	37	$296,819	21	22	6	53	59	(37)	0.24	0.24	(1%)	0.351
Electrical Equip, Appliance & Component Mfg	350	538	18	54%	$44,743,062	15	$83,145	2	$22,371,531	2	188	6	32	38	150	1.58	2.29	45%	0.634
Energy (Fossil And Renewable)	3,734	4,412	6	18%	$242,232,976	5	$54,898	311	$779,511	16	679	167	340	507	172	0.70	0.76	9%	0.226
Fabricated Metal Product Mfg	2,077	2,329	8	12%	$127,439,544	9	$54,716	53	$2,393,231	8	252	123	189	312	(60)	2.69	2.74	2%	0.197
Forest And Wood Products	1,554	1,783	10	15%	$73,015,466	12	$40,940	101	$724,719	17	229	7	141	148	81	1.03	1.13	10%	0.174
Glass And Ceramics	347	320	21	(8%)	$20,462,449	20	$63,939	9	$2,273,605	9	(27)	3	32	35	(62)	2.10	1.84	(12%)	0.278
Information Technology And Telecommunications	2,192	2,094	9	(4%)	$149,727,062	7	$71,502	97	$1,543,578	12	(98)	61	199	260	(358)	0.55	0.49	(11%)	0.254
Machinery Mfg	1,065	1,419	13	33%	$74,216,881	11	$52,289	27	$2,748,773	7	354	47	97	144	210	1.71	2.10	23%	0.274
Mining	396	384	20	(3%)	$32,248,986	17	$84,078	8	$4,031,123	5	(13)	36	36	72	(85)	1.41	1.20	(14%)	0.299
Primary Metal Mfg	1,060	931	14	(12%)	$85,781,937	10	$92,126	5	$17,156,387	3	(129)	(18)	96	79	(208)	4.74	4.05	(14%)	0.461
Printing And Publishing	884	745	16	(16%)	$30,055,343	19	$40,333	50	$601,107	18	(139)	(30)	80	50	(189)	0.49	0.41	(17%)	0.245
Transportation And Logistics	2,698	2,927	7	8%	$142,074,413	8	$48,543	162	$877,003	15	229	207	245	452	(223)	0.88	0.85	(3%)	0.209
Transportation Equipment Mfg	8,280	11,566	1	40%	$1,144,197,858	1	$98,931	23	$49,747,733	1	3,285	968	753	1,721	1,564	10.19	12.32	21%	0.777
KEY	Top 10	Top 10	Top 10	+ Change	Above Median	Top 11	Above Median	Above Median	Above Median	Top 11	+ Change				+ Change	Above 1.2	Above 1.2	+ Change	
Average	2,722	2,950			$176,790,287		$55,843	94	$5,514,009										
Median	1,587	1,677			$73,616,173		$53,502	48	$1,754,288										



Regional Data Snapshot

Agribusiness Industry Clusters

North Central IN RPC, Indiana

PURDUE UNIVERSITY

Center for Regional Development
Advancing Collaboration : Energizing Regions

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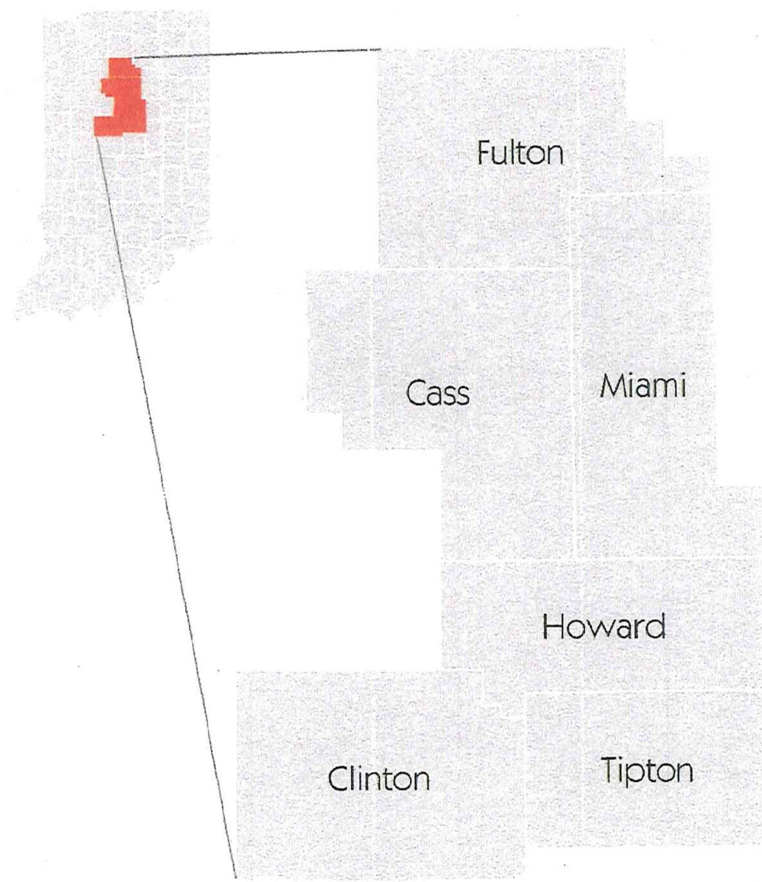
01 overview

North Central IN RPC, IN

North Central IN RPC

The North Central IN RPC Region is comprised of 6 Indiana counties. State Highway 31 connects the region to Indianapolis in the south, and South Bend in the north.

- Cass
- Clinton
- Fulton
- Howard
- Miami
- Tipton



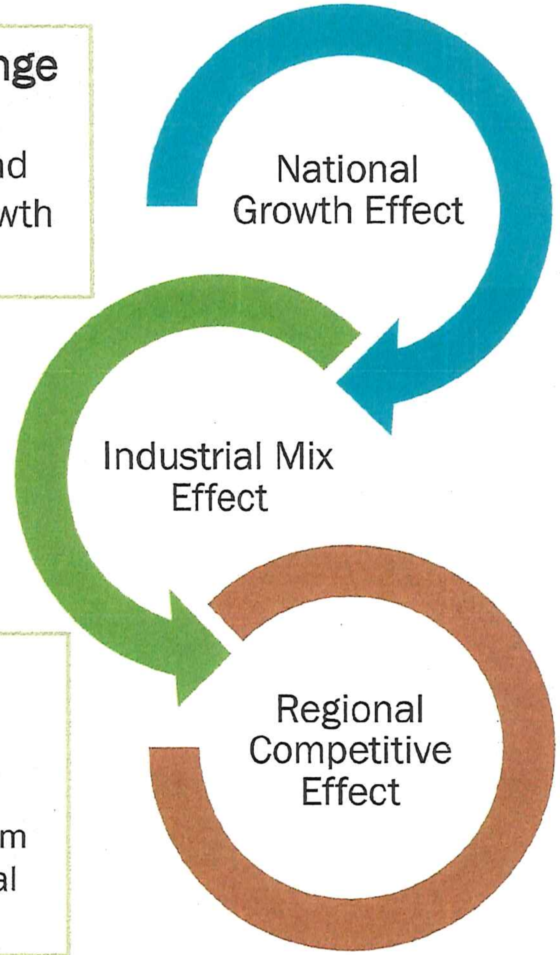
02 target industry clusters

Agribusiness, Food Processing and Technology

Regional Job Growth:

Three Key Components of the Shift-Share Analysis

Expected Change
The sum of the industrial mix and the national growth effects



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

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

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

Source: EMSI Website, http://www.economicmodeling.com/2011/12/05/understanding-shift-share-2/

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

Agribusiness, Food Processing and Technology

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Crop Production	2,284	220	-171	49	-234	-283
Meat Processed from Carcasses	2,268	205	-19	186	-75	-261
Animal Production and Aquaculture	1,662	159	-187	-28	-157	-129
Other Snack Food Manufacturing	1,237	112	155	267	-41	-308
Confectionery Manufacturing from Purchased Chocolate	393	27	-19	8	80	↑ 72
Animal (except Poultry) Slaughtering	359	23	-43	-20	100	↑ 120
Frozen Specialty Food Manufacturing	354	20	-6	14	123	↑ 109
Farm Supplies Merchant Wholesalers	323	27	-7	20	8	-12
Farm Machinery and Equipment Manufacturing	231	13	8	21	77	↑ 56
Farm and Garden Machinery and Equipment Merchant Wholesalers	217	19	-8	11	4	-7
Grain and Field Bean Merchant Wholesalers	175	15	-2	13	3	-10
Farm Labor Contractors and Crew Leaders	173	13	14	27	23	-4
Soil Preparation, Planting, and Cultivating	131	8	0	8	44	↑ 36
Dog and Cat Food Manufacturing	98	4	6	10	49	↑ 39
Fluid Milk Manufacturing	80	15	-17	-2	-97	-95

Note: Upward arrow (↑) indicates regional competitiveness.

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Animal (except Poultry) Slaughtering
- Frozen Specialty Food Manufacturing
- Confectionery Manufacturing from Purchased Chocolate
- Farm Machinery and Equipment Manufacturing
- Dog and Cat Food Manufacturing
- Soil Preparation, Planting, and Cultivating

Industries that Underperformed

- Farm Labor Contractors and Crew Leaders
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Grain and Field Bean Merchant Wholesalers
- Farm Supplies Merchant Wholesalers
- Fluid Milk Manufacturing
- Animal Production and Aquaculture
- Meat Processed from Carcasses
- Crop Production
- Other Snack Food Manufacturing

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Agribusiness, Food Processing and Technology

Industries	Exports 2015 ($ Millions)	Jobs 2015	Export per job 2015 ($)	LQ 2015
Crop Production	$282.4	2,284	$123,629	2.7
Meat Processed from Carcasses	$986.6	2,268	$435,015	32.7
Animal Production and Aquaculture	$340.0	1,662	$204,618	2.5
Other Snack Food Manufacturing	$922.4	1,237	$745,655	51.6
Confectionery Manufacturing from Purchased Chocolate	$84.3	393	$214,839	19.6
Animal (except Poultry) Slaughtering	$163.7	359	$456,567	4.5
Frozen Specialty Food Manufacturing	$79.9	354	$225,730	10.4
Farm Supplies Merchant Wholesalers	$56.3	323	$174,381	4.7
Farm Machinery and Equipment Manufacturing	$67.8	231	$293,755	6.1
Farm and Garden Machinery and Equipment Merchant Wholesalers	$27.3	217	$125,796	3.5
Grain and Field Bean Merchant Wholesalers	$28.7	175	$163,814	5.7
Farm Labor Contractors and Crew Leaders	$1.6	173	$9,155	0.9
Soil Preparation, Planting, and Cultivating	$1.8	131	$14,101	3.2
Dog and Cat Food Manufacturing	$57.7	98	$587,262	7.0
Fluid Milk Manufacturing	$81.7	80	$1,022,890	2.6

Note: Sorted similarly as the shift-share analysis slide.

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

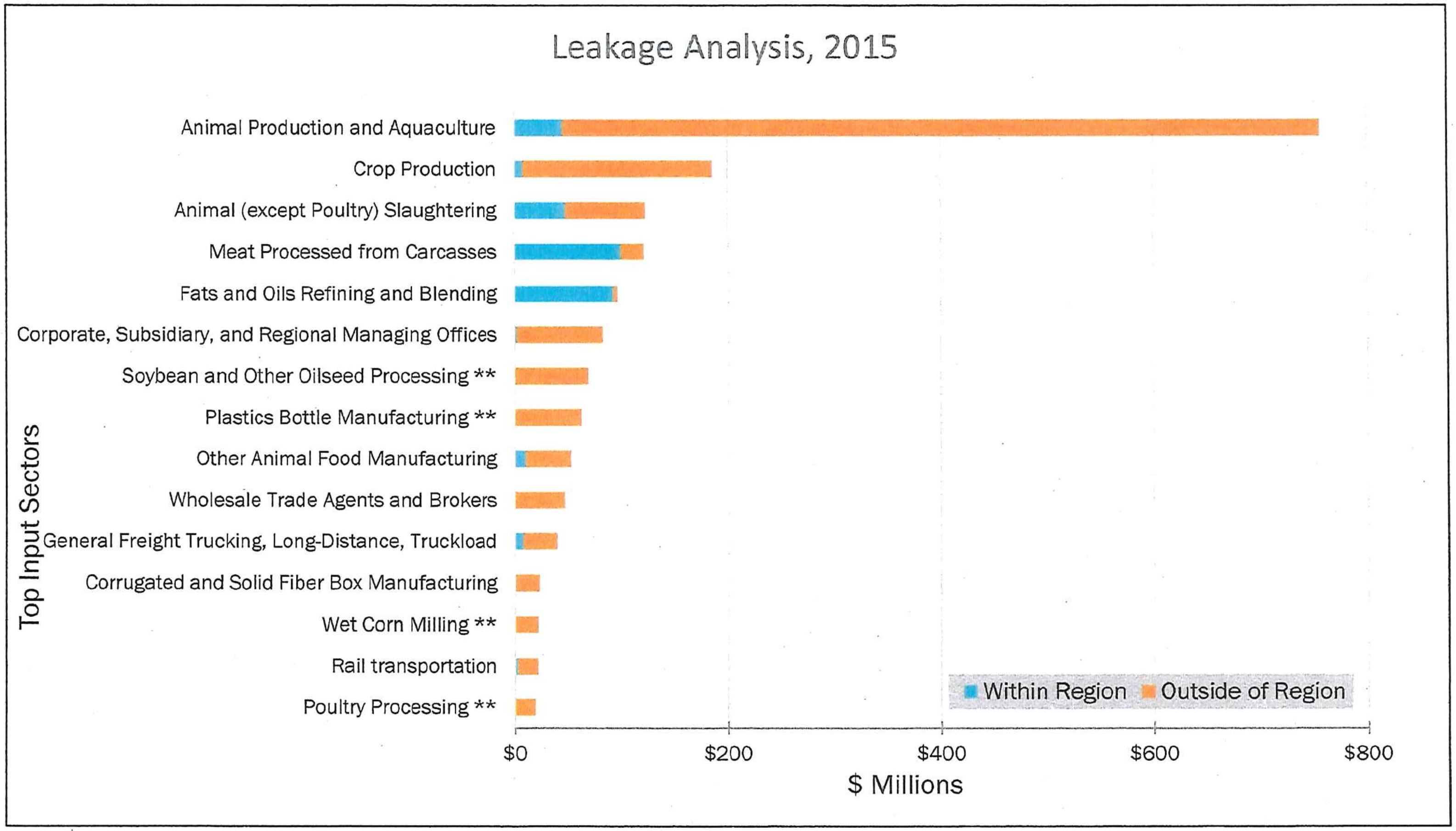
Agribusiness, Food Processing and Technology

Industries	Estimated Input ($ Millions), 2015	% In-Region	% Out of Region
Animal Production and Aquaculture	$756.50	6%	94%
Crop Production	$185.30	4%	96%
Animal (except Poultry) Slaughtering	$123.22	39%	61%
Meat Processed from Carcasses	$121.66	82%	18%
Fats and Oils Refining and Blending	$97.06	96%	4%
Corporate, Subsidiary, and Regional Managing Offices	$83.28	3%	97%
Soybean and Other Oilseed Processing **	$69.40	0%	100%
Plastics Bottle Manufacturing **	$62.55	0%	100%
Other Animal Food Manufacturing	$52.81	20%	80%
Wholesale Trade Agents and Brokers	$47.38	1%	99%
General Freight Trucking, Long-Distance, Truckload	$40.31	20%	80%
Corrugated and Solid Fiber Box Manufacturing	$23.66	6%	94%
Wet Corn Milling **	$22.41	0%	100%
Rail transportation	$22.06	15%	85%
Poultry Processing **	$19.83	0%	100%

Note: ** industry sector is not present in the region.

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Agribusiness, Food Processing and Technology



Note: ** industry sector is not present in the region.

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,862	-16%	$13.1	High school diploma or equivalent
Meat, Poultry, and Fish Cutters and Trimmers	893	3%	$13.0	No formal educational credential
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	713	25%	$11.3	No formal educational credential
Packaging and Filling Machine Operators and Tenders	365	6%	$13.7	High school diploma or equivalent
Food Batchmakers	335	11%	$11.2	High school diploma or equivalent
Packers and Packagers, Hand	326	5%	$11.8	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	291	4%	$12.7	No formal educational credential
Helpers–Production Workers	251	5%	$12.2	No formal educational credential
First-Line Supervisors of Production and Operating Workers	177	4%	$25.0	High school diploma or equivalent
Industrial Truck and Tractor Operators	161	6%	$16.2	No formal educational credential
Inspectors, Testers, Sorters, Samplers, and Weighers	147	7%	$16.1	High school diploma or equivalent
Maintenance and Repair Workers, General	146	4%	$17.9	High school diploma or equivalent
Team Assemblers	145	14%	$16.5	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	140	1%	$26.9	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	135	7%	$18.0	Postsecondary nondegree award

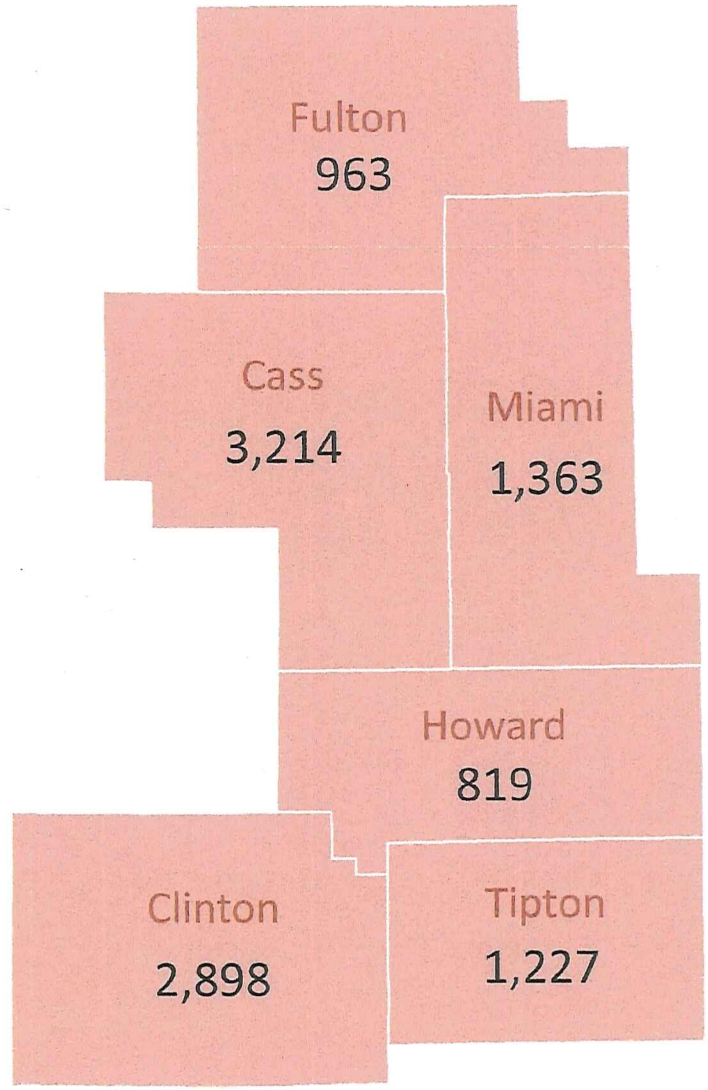
Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors).

03 Cluster Comparisons

Agribusiness, Food Processing and Technology

Contribution by Counties (Jobs, 2015)



Source: EMSI 2016.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology
Regional Performance, 2009-2015 (Shift-share analysis)	-586 (negative value)
Export value, 2014	$3,524,259,935
Leakage, 2014	$262,958,977
Number of establishments, 2015	228
Contribution by counties	6
Business input	Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.
Resident's value	Review Civic Forum Input from Residents

Source: EMSI 2016.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Regional Data Snapshot

Combined Manufacturing Industry Sub-Clusters

North Central IN RPC, Indiana

PURDUE
UNIVERSITY

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01 Overview

North Central IN RPC, IN

Cluster overview

Overview

North Central IN RPC

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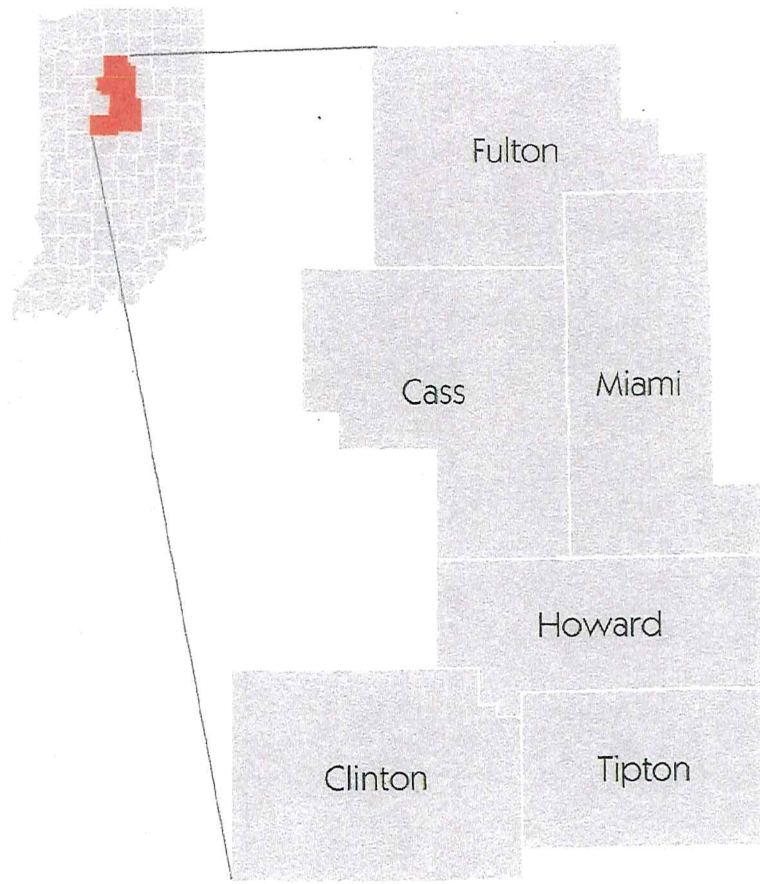


Cluster Overview

	MEFT	FM
Manufacturing Sub-clusters	• Electrical equipment • Fabricated Metal • Machinery Manufacturing • Transportation Equipment manufacturing	• Fabricated Metal • Machinery Manufacturing
Industries	121	40
Jobs in the region (2015)	15,814	1,397
Avg. Earnings Per Job (2015)	$87,658	$50,635
Number of establishments (2015)	105	27

Cluster Overview

Manufacturing clusters: MEFT

Subsectors

- Electrical equipment
- Fabricated Metal
- Machinery Manufacturing
- Transportation Equipment manufacturing

Industry overview

- Comprising 121 industries
- Offering 15,814 jobs for the region
- Avg. Earnings Per Job $87,658
- Number of establishments 105

Manufacturing clusters: FM

Subsectors:

- Fabricated Metal
- Machinery Manufacturing

Industry overview

- Comprising 40 industries
- Offering 1,397 jobs for the region
- Avg. Earnings Per Job $50,635
- Number of establishments 27

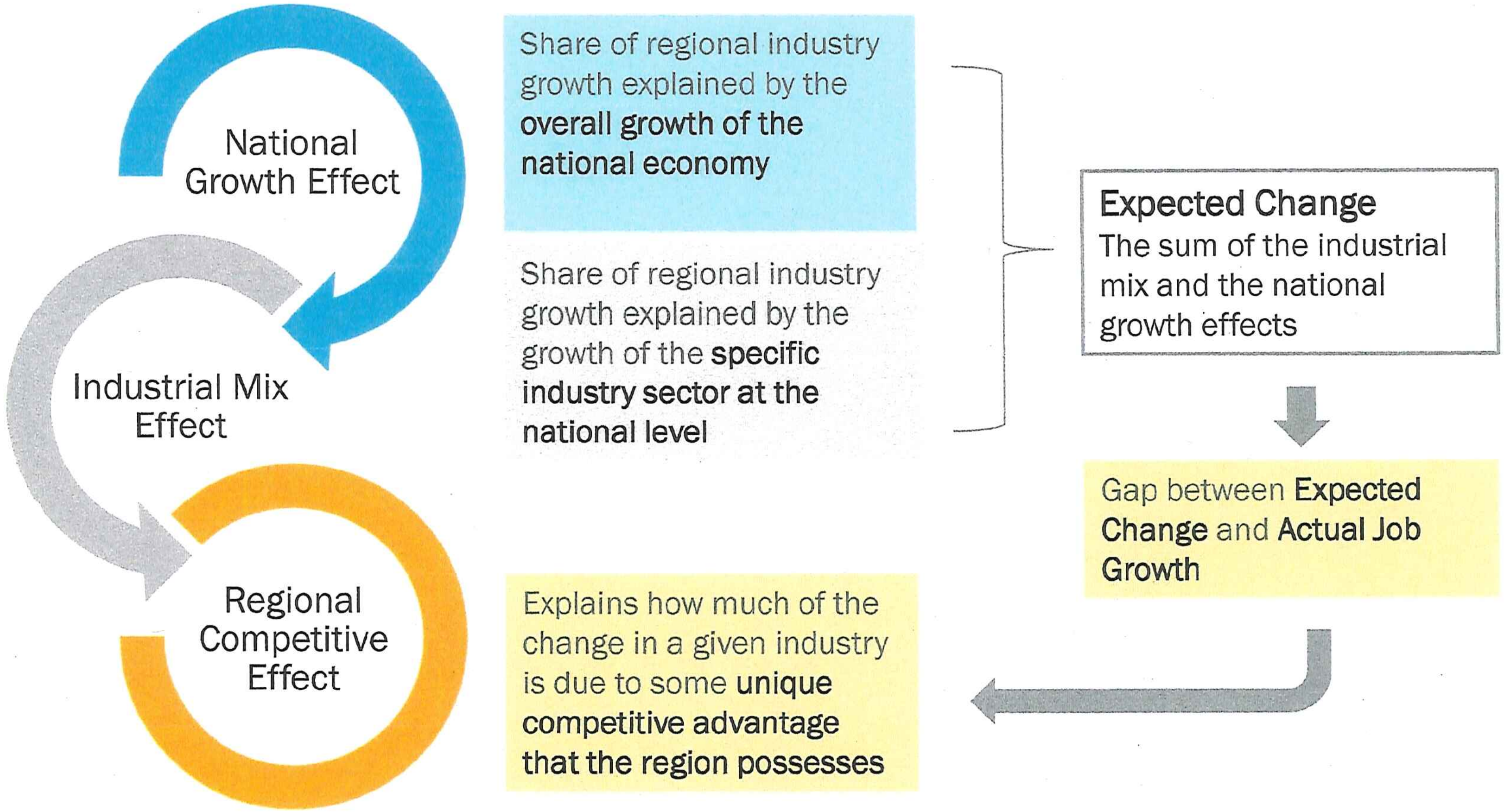
02 Manufacturing Sub-clusters

MEFT

- Shift-share analysis
- Export & LQ
- Leakage analysis
- Occupation

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



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

section 02

Source: EMSI Website. http://www.economicmodeling.com/2011/12/05/understanding-shift-share-2/

Manufacturing sectors: MEFT

Industries	Jobs 2015	National Trend 2009-2015	Industry Trend 2009-2015	Cumulative Expected Growth	Actual Job Growth 2009-2015	Regional Performance 2009-2015
		A	B	C=A+B	D	D-C
Motor Vehicle Transmission and Power Train Parts Manufacturing	8,234	308	1,357	1,665	4,863	↑ 3,199
Motor Vehicle Electrical and Electronic Equipment Manufacturing	2,204	297	-112	185	-1,046	-1,231
Machine Shops	695	37	43	80	285	↑ 205
Motor Vehicle Metal Stamping	414	34	143	177	44	-133
Switchgear and Switchboard Apparatus Manufacturing	410	24	13	37	145	↑ 107
Spring Manufacturing	405	33	62	95	45	-49
All Other Miscellaneous General Purpose Machinery Manufacturing	405	15	0	15	240	↑ 225
Other Motor Vehicle Parts Manufacturing	310	17	45	62	127	66
Metal Crown, Closure, and Other Metal Stamping	294	22	4	26	51	↑ 26
Bolt, Nut, Screw, Rivet, and Washer Manufacturing	282	24	12	36	16	-20
Farm Machinery and Equipment Manufacturing	231	14	6	20	78	58
Motor Vehicle Seating and Interior Trim Manufacturing	214	21	151	172	-20	↑ -193
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	172	17	7	24	-15	-38
Pump and Pumping Equipment Manufacturing	168	11	-5	6	48	↑ 43
Cutting Tool and Machine Tool Accessory Manufacturing	118	8	7	15	30	↑ 15

Note: Upward arrow (↑) indicates regional competitiveness.

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: MEFT

Industries that Outperformed

- Motor Vehicle Transmission and Power Train Parts Manufacturing
- All Other Miscellaneous General Purpose Machinery Manufacturing
- Machine Shops
- Switchgear and Switchboard Apparatus Manufacturing
- Other Motor Vehicle Parts Manufacturing
- Farm Machinery and Equipment Manufacturing
- Pump and Pumping Equipment Manufacturing
- Metal Crown, Closure, and Other Metal Stamping
- Cutting Tool and Machine Tool Accessory Manufacturing

Industries that Underperformed

- Bolt, Nut, Screw, Rivet, and Washer Manufacturing
- Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing
- Spring Manufacturing
- Motor Vehicle Metal Stamping
- Motor Vehicle Seating and Interior Trim Manufacturing
- Motor Vehicle Electrical and Electronic Equipment Manufacturing

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: MEFT

Industries	Exports 2015 ($ Millions)	Jobs 2015	Export per job 2015 ($)	LQ 2015
Motor Vehicle Transmission and Power Train Parts Manufacturing	$6,339.8	8,234	$769,955	176.2
Motor Vehicle Electrical and Electronic Equipment Manufacturing	$1,180.8	2204	$33,778	64.6
Machine Shops	$71.3	695	$102,534	3.8
Motor Vehicle Metal Stamping	$237.0	414	$304,016	8.7
Switchgear and Switchboard Apparatus Manufacturing	$125.9	410	$268,403	19.6
All Other Miscellaneous General Purpose Machinery Manufacturing	$74.4	405	$159,681	16.3
Spring Manufacturing	$72.9	405	$108,479	40.9
Other Motor Vehicle Parts Manufacturing	$110.0	310	$203,226	3.6
Metal Crown, Closure, and Other Metal Stamping	$63.0	294	$77,297	9.3
Bolt, Nut, Screw, Rivet, and Washer Manufacturing	$78.2	282	$277,480	11.8
Farm Machinery and Equipment Manufacturing	$64.7	231	$109,745	6.1
Motor Vehicle Seating and Interior Trim Manufacturing	$123.8	214	$340,457	5.2
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	$25.4	172	$1,378,167	9.7
Pump and Pumping Equipment Manufacturing	$43.9	168	$736,860	10.0
Cutting Tool and Machine Tool Accessory Manufacturing	$22.7	118	$10,006,422	7.2

Note: Sorted similarly as the shift-share analysis slide.

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

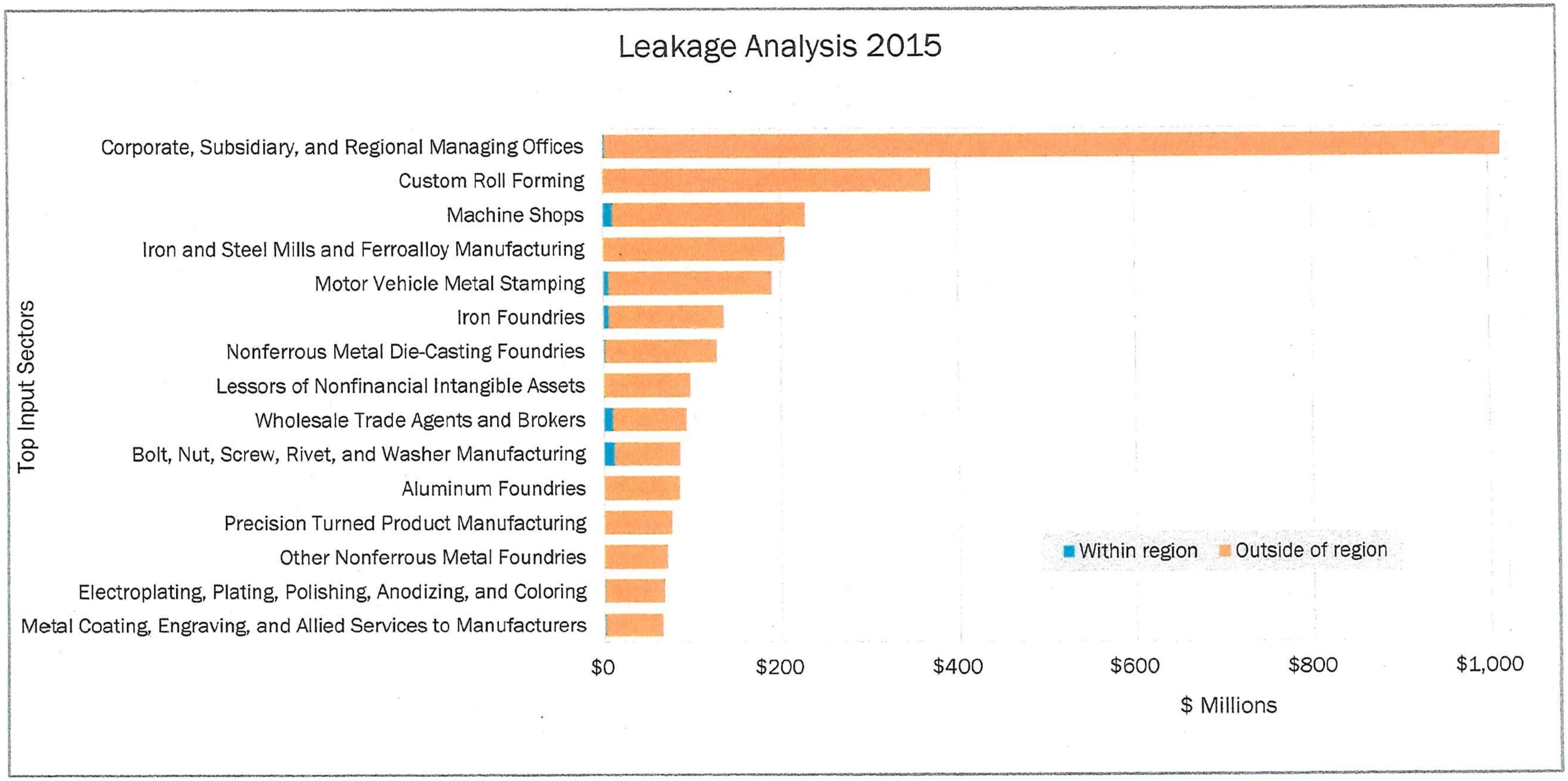
Manufacturing sectors: MEFT

Industries	Estimated Input ($ Millions), 2015	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	$1,014.41	0.3%	99.7%
Custom Roll Forming	$370.12	0.0%	100.0%
Machine Shops	$229.06	4.9%	95.1%
Iron and Steel Mills and Ferroalloy Manufacturing	$205.19	0.2%	99.8%
Motor Vehicle Metal Stamping	$190.06	3.5%	96.5%
Iron Foundries	$135.14	5.0%	95.0%
Nonferrous Metal Die-Casting Foundries	$127.20	1.8%	98.2%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	$96.92	0.7%	99.3%
Wholesale Trade Agents and Brokers	$92.42	11.4%	88.6%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing	$85.37	14.4%	85.6%
Aluminum Foundries (except Die-Casting)	$84.59	0.0%	100.0%
Precision Turned Product Manufacturing	$75.67	1.0%	99.0%
Other Nonferrous Metal Foundries (except Die-Casting)	$70.93	0.0%	100.0%
Electroplating, Plating, Polishing, Anodizing, and Coloring	$67.91	2.6%	97.4%
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	$65.36	3.4%	96.6%

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Manufacturing sectors: MEFT



section 02

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: MEFT

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings ($)	Entry Level Education
Machinists	1,288	70%	19.3	High school diploma or equivalent
Team Assemblers	1,016	-8%	13.9	High school diploma or equivalent
Engine and Other Machine Assemblers	836	91%	20.9	High school diploma or equivalent
Production Workers, All Other	788	97%	16.3	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	764	59%	27.0	High school diploma or equivalent
Helpers–Production Workers	611	77%	12.0	No formal educational credential
Tool and Die Makers	579	61%	25.5	High school diploma or equivalent
Electrical and Electronic Equipment Assemblers	561	70%	13.9	High school diploma or equivalent
Computer-Controlled Machine Tool Operators, Metal and Plastic	487	59%	17.1	High school diploma or equivalent
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	376	59%	20.2	High school diploma or equivalent
Industrial Engineers	322	53%	38.7	Bachelor's degree
Electricians	301	94%	31.4	High school diploma or equivalent
Mechanical Engineers	291	54%	39.4	Bachelor's degree
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	288	-4%	14.2	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	286	14%	17.4	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

02 Manufacturing Sub-clusters

FM

- Shift-share analysis
- Export & LQ
- Leakage analysis
- Occupation

Manufacturing sectors: FM

Industries	Jobs 2015	National Trend 2009-2015	Industry Trend 2009-2015	Cumulative Expected Growth	Actual Job Growth 2009-2015	Regional Performance 2009-2015
		A	B	C=A+B	D	D-C
All Other Miscellaneous General Purpose Machinery Manufacturing	405	15	0	15	240	↑ 225
Farm Machinery and Equipment Manufacturing	231	14	6	20	78	↑ 58
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	172	17	7	24	-15	-38
Pump and Pumping Equipment Manufacturing	168	11	-5	6	48	↑ 43
Cutting Tool and Machine Tool Accessory Manufacturing	118	8	7	15	30	↑ 15
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	88	8	0	8	-5	-13
Industrial Mold Manufacturing	83	7	9	16	4	-12
Other Industrial Machinery Manufacturing	52	4	4	8	12	↑ 4
Conveyor and Conveying Equipment Manufacturing	32	2	2	4	8	↑ 4
Machine Tool Manufacturing	28	4	3	7	-17	-24
Printing Machinery and Equipment Manufacturing	19	0	0	0	19	↑ 19

Note: (1) Upward arrow (↑) indicates regional competitiveness.
(2) only report 11 industries that offered job >0 in 2015

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: FM

Industries that Outperformed

- All Other Miscellaneous General Purpose Machinery Manufacturing
- Farm Machinery and Equipment Manufacturing
- Pump and Pumping Equipment Manufacturing
- Printing Machinery and Equipment Manufacturing
- Cutting Tool and Machine Tool Accessory Manufacturing
- Other Industrial Machinery Manufacturing
- Conveyor and Conveying Equipment Manufacturing

Industries that Underperformed

- Industrial Mold Manufacturing
- Special Die and Tool, Die Set, Jig, and Fixture Manufacturing
- Machine Tool Manufacturing
- Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: FM

Industries	Exports 2015 ($ Millions)	Jobs 2015	Export per job 2015 ($)	LQ 2015
All Other Miscellaneous General Purpose Machinery Manufacturing	$74.4	405	$183,917	16.3
Farm Machinery and Equipment Manufacturing	$64.7	231	$280,270	6.1
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	$25.4	172	$147,355	9.7
Pump and Pumping Equipment Manufacturing	$43.9	168	$260,755	9.9
Cutting Tool and Machine Tool Accessory Manufacturing	$22.7	118	$191,914	7.2
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	$9.2	88	$104,483	2.2
Industrial Mold Manufacturing	$7.6	83	$92,495	3.3
Other Industrial Machinery Manufacturing	$10.2	52	$197,073	1.5
Conveyor and Conveying Equipment Manufacturing	$13.8	32	$429,492	1.8
Machine Tool Manufacturing	$4.7	28	$171,039	1.1
Printing Machinery and Equipment Manufacturing	$5.0	19	$260,720	4.1

Note: Sorted similarly as the shift-share analysis slide.

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

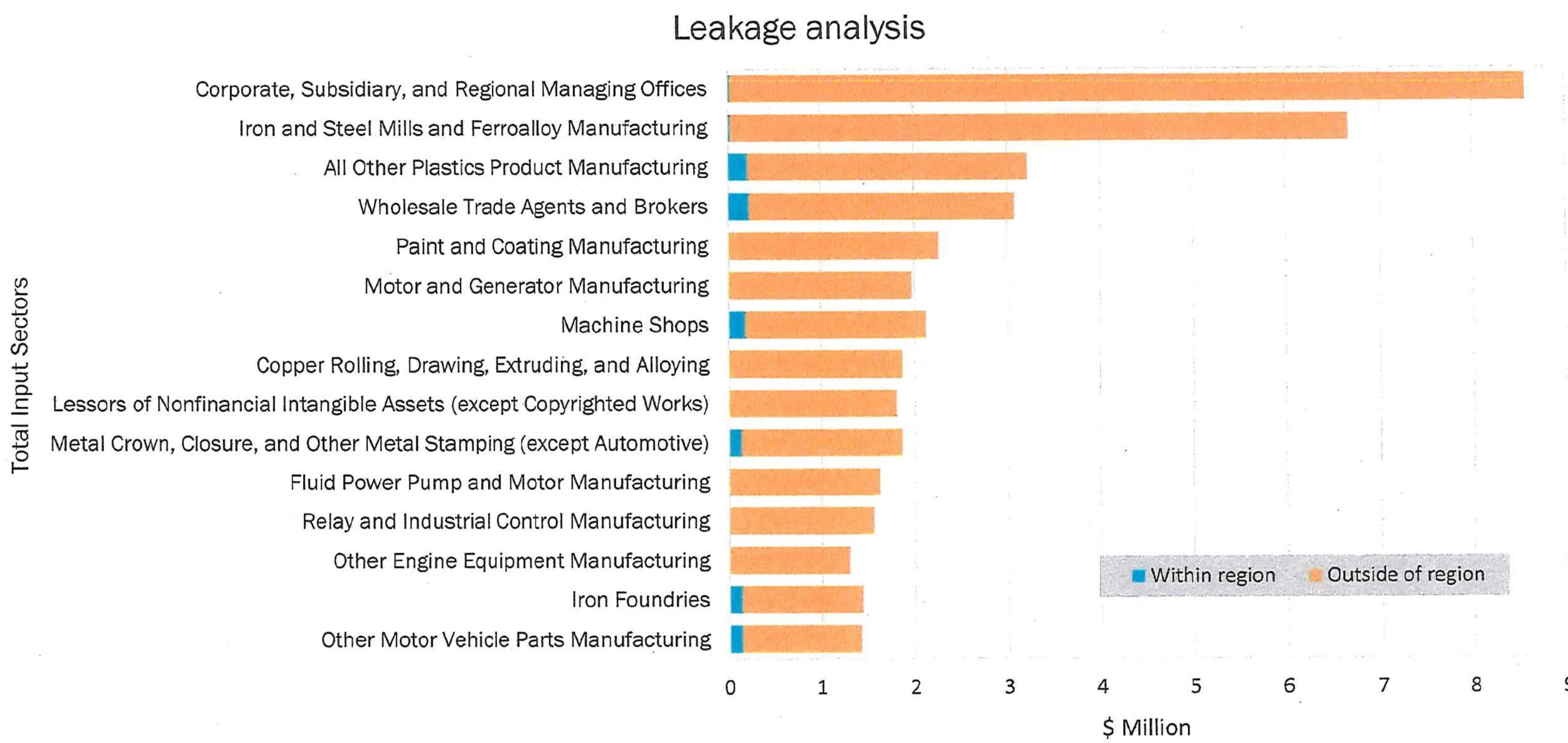
Manufacturing sectors: FM

Industries	Estimated Input ($ Millions), 2015	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	$8.58	0.3%	99.7%
Iron and Steel Mills and Ferroalloy Manufacturing	$6.67	0.4%	99.6%
All Other Plastics Product Manufacturing	$3.22	6.8%	93.2%
Wholesale Trade Agents and Brokers	$3.08	7.6%	92.4%
Paint and Coating Manufacturing	$2.27	0.0%	100.0%
Machine Shops	$2.13	8.7%	91.3%
Motor and Generator Manufacturing	$1.98	0.0%	100.0%
Copper Rolling, Drawing, Extruding, and Alloying	$1.88	0.0%	100.0%
Metal Crown, Closure, and Other Metal Stamping	$1.87	7.3%	92.7%
Lessors of Nonfinancial Intangible Assets	$1.81	0.6%	99.4%
Fluid Power Pump and Motor Manufacturing	$1.63	0.0%	100.0%
Relay and Industrial Control Manufacturing	$1.57	0.8%	99.2%
Iron Foundries	$1.44	9.9%	90.1%
Other Motor Vehicle Parts Manufacturing	$1.43	10.1%	89.9%
Other Engine Equipment Manufacturing	$1.31	0.0%	100.0%

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Manufacturing sectors: FM



section 02

Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

Manufacturing sectors: FM

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings ($)	Entry Level Education
Team Assemblers	190	32%	$13.9	High school diploma or equivalent
Machinists	121	42%	$19.3	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	70	67%	$18.3	High school diploma or equivalent
Computer-Controlled Machine Tool Operators, Metal and Plastic	52	41%	$17.1	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	51	42%	$27.0	High school diploma or equivalent
Tool and Die Makers	47	2%	$25.5	High school diploma or equivalent
Assemblers and Fabricators, All Other	45	88%	$18.6	High school diploma or equivalent
Mechanical Engineers	39	56%	$39.4	Bachelor's degree
Engine and Other Machine Assemblers	34	62%	$20.9	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	30	36%	$17.4	High school diploma or equivalent
Helpers--Production Workers	30	36%	$12.0	No formal educational credential
General and Operations Managers	29	45%	$30.5	Bachelor's degree
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	28	27%	$14.2	High school diploma or equivalent
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	26	24%	$16.9	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	25	39%	$25.8	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

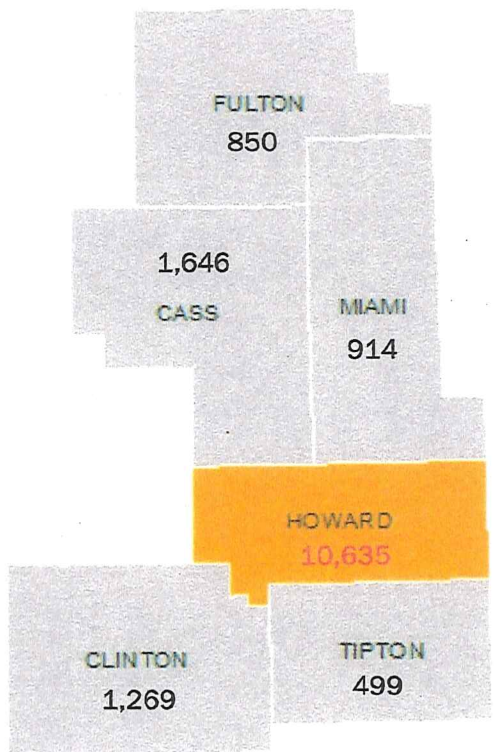
Source: EMSI Class of Worker 2017.3 (QCEW, non-QCEW, self-employed and extended proprietors).

03 Cluster Comparisons

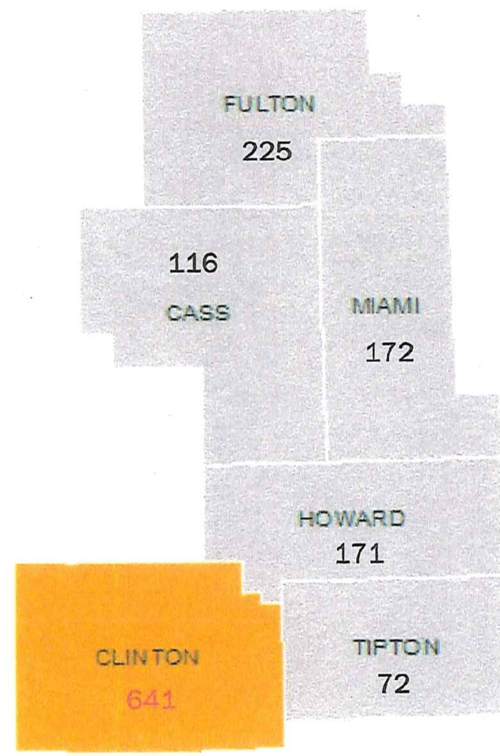
- Jobs by county
- Industry Output

Contribution by Counties (Jobs, 2015)

Manufacturing sectors: MEFT



Manufacturing sectors: FM



Source: EMSI 2017.3 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Industry Output and Labor Efficiency Metrics, 2015

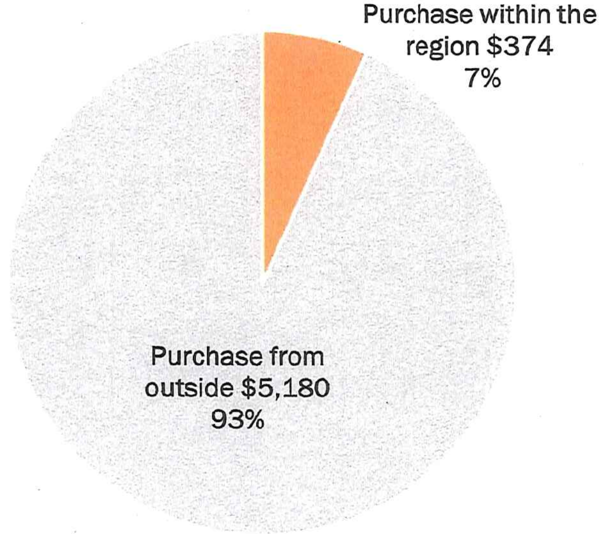
	Within Region		Indiana	
	MEFT	% of Total	MEFT	% of Total
Sales ($ Million)	$9,010	40.7%	$130,047	19.4%
Gross Regional Product ($ Million) *	$2,499	27.8%	$36,558	11.3%
Exports ($ Million)	$8,869	47.5%	$109,967	24.9%
Jobs	15,814	14.3%	237,869	6.3%
GRP per Job($)**	$158,002	194.1%	$153,688	180.6%
Exports per Job***	$560,853	331.1%	$462,298	397.6%
Total Supply Chain Purchase($ Million)	$5,554	/	$73,616	/
Within region	$374	6.7%	$24,377	33.1%
Imported from outside	$5,180	93.3%	$49,239	66.9%

*NOTE: Gross Regional Product (GRP) refers to the value added of all final goods and services produced in the region
** GRP per job in MEFT is compared to the average GRP per job in the region to estimate % of Total
*** Exports per job in MEFT is compared to the average Exports per job in the region to estimate % of Total

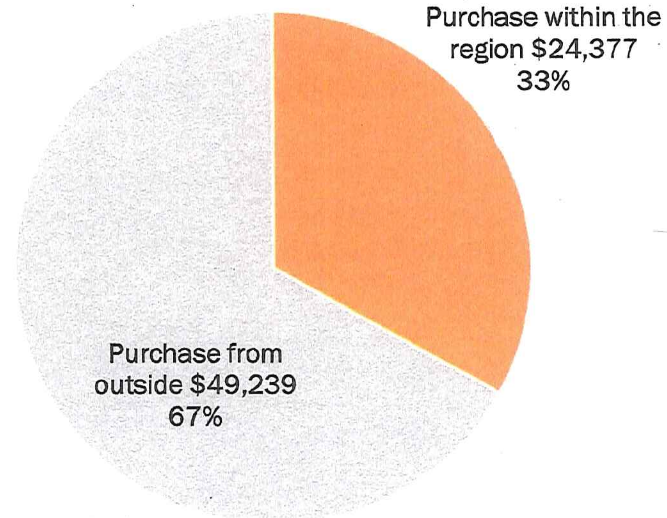
Source: EMSI 2017.3 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Leakage Comparison, 2015

NCIRPC Region ($ Million)



Indiana State ($ Million)



Source: EMSI 2017.3 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Economic Attributes: Within Region FM

Industry Output and Labor Efficiency Metrics, 2015

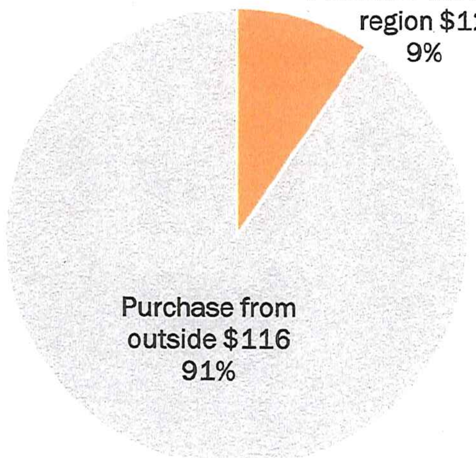
	Within Region		Indiana	
	FM	% of Total	FM	% of Total
Sales ($ Million)	$291	1.3%	$17,639	2.6%
Gross Regional Product ($ Million) *	$129	1.4%	$6,088	1.9%
Exports ($ Million)	$282	1.5%	$15,045	3.4%
Jobs	1,396	1.3%	44,424	1.2%
GRP per Job($)**	$92,132	113.2%	$137,042	161.0%
Exports per Job***	$201,938	119.2%	$338,675	291.3%
Total Supply Chain Purchase($ Million)	$128	/	$9,102	/
Within region	$12	9.4%	$3,188	35.0%
Imported from outside	$116	90.6%	$5,914	65.0%

*NOTE: Gross Regional Product (GRP) refers to the value added of all final goods and services produced in the region
** GRP per job in MEFT is compared to the average GRP per job in the region to estimate % of Total
*** Exports per job in MEFT is compared to the average Exports per job in the region to estimate % of Total

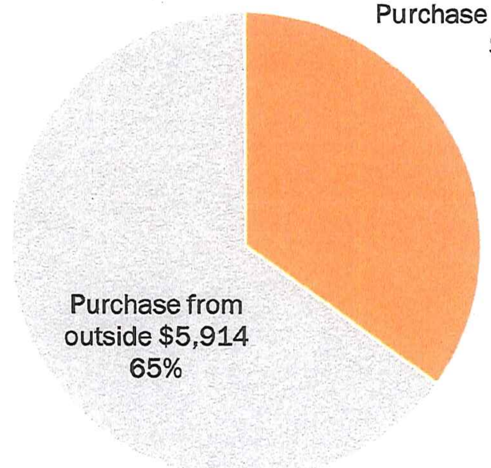
Source: EMSI 2017.3 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

Leakage Comparison, 2015

NCIRPC Region($ Million)



Indiana State ($ Million)



Source: EMSI 2017.3 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD