



Economic Development

The Upper East Texas region stretches from the serene expanses of the pine forests bordering Arkansas and Louisiana to the energetic eastern fringe of the Dallas-Fort Worth Metroplex. This varied landscape is echoed in the mosaic of industries that fuel the region's growth.

Agriculture has traditionally anchored the Upper East Texas economy. Agricultural enterprises such as horticulture, timber and the dairy industry have remained robust, while value-added activities such as food processing and food distribution have evolved to support them.

Transportation also has played a pivotal role in the area's economy. Industries including the manufacture of railroad rolling stock (locomotives, railcars, coaches and wagons), tires and motor vehicle bodies, as well as various services that support transportation, have relatively high concentrations of employment in Upper East Texas. Distribution, warehousing and storage services also have found a niche in this region.

Economic Trends

Exhibit 2 displays the increase in employment expected for the Upper East Texas region, its urban and rural areas and the state of Texas as a whole from 2002 to 2012. These expected changes are presented in the form of growth indices, using 2002 as the base year with an index equal to 100.

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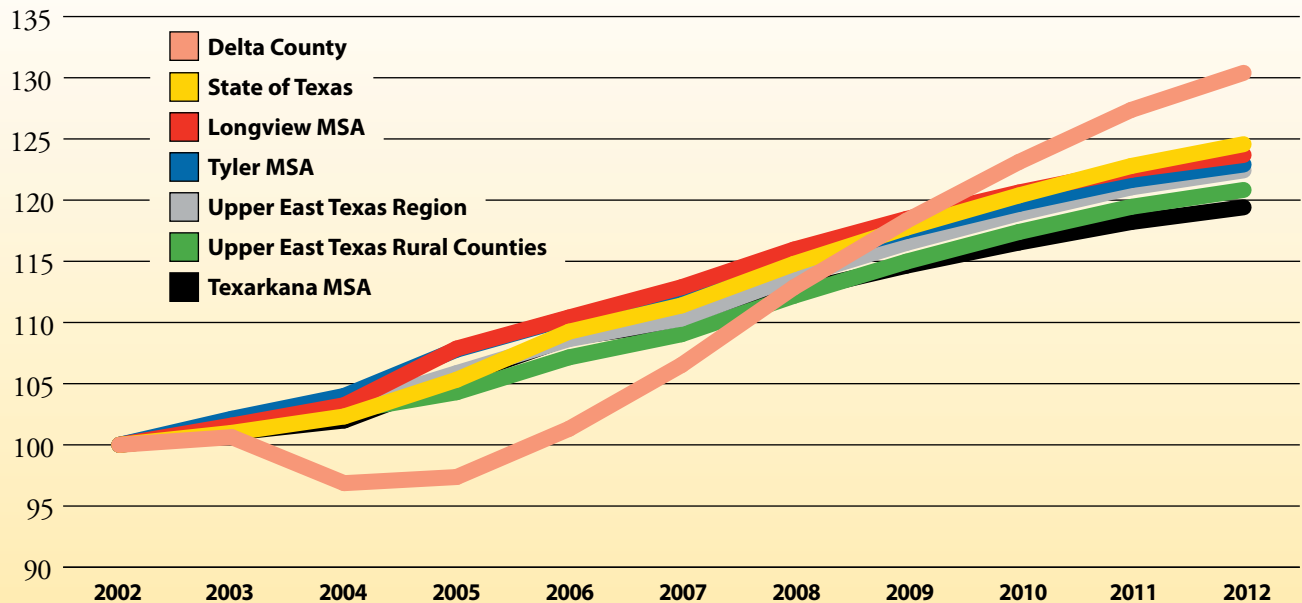


East Texas timber near Mt. Pleasant

PHOTO: Courtesy of James Taylor Timber.com

Exhibit 2

Upper East Texas Region Employment Indices, 2002-2012



Source: Economic Modeling Specialists Inc.

Among the three metropolitan statistical areas (MSAs) that comprise Upper East Texas, the Longview MSA will experience the largest job growth rate through 2012, at 23.7 percent. The MSAs of Tyler and Texarkana will realize employment growth rates of 22.9 percent and 19.4 percent, respectively.

Delta County, the only county in the region that is part of the Dallas-Fort Worth-Arlington MSA, is expected to experience the region's highest job growth. From 2002 to 2012, the county is expected to increase its number of jobs from 2,207 in 2002 to 2,878 in 2012, a 30.4 percent increase.

In all, however, employment growth in the region and its rural counties will parallel the state's. Between 2002 and 2012, employment in Texas is expected to increase by 24.6 percent. The region as a whole and its rural

counties are expected to undergo job growth at rates of 22.4 percent and 20.8 percent, respectively.

Exhibit 3 provides a more detailed picture of projected employment growth in Upper East Texas. It displays growth indices, again with 2002 as the base year, for various industries in the region. Employment numbers for these industries are presented at the 11-industry "supersector" level of the North American Industry Classification System (NAICS).¹

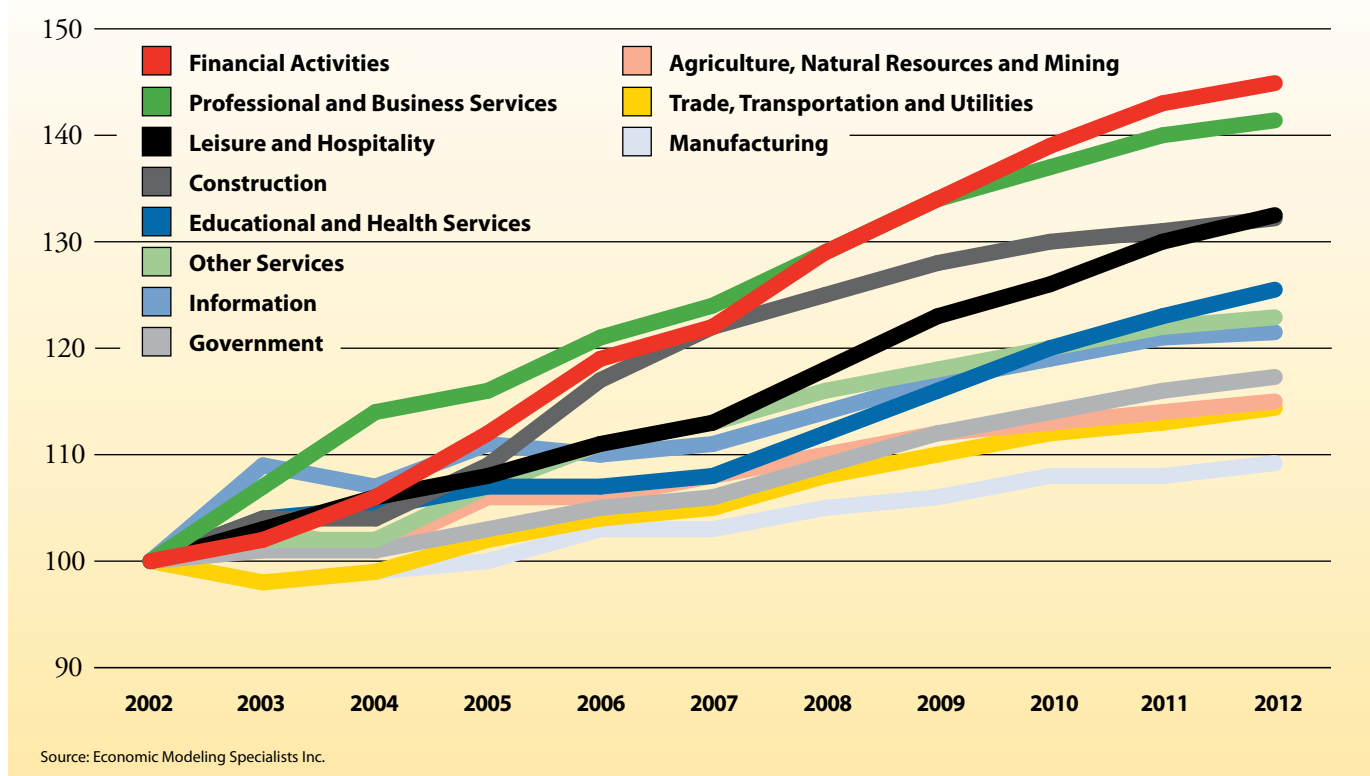
A supersector, as identified by a two-digit NAICS code, represents an aggregation of industries producing related goods and services. At this level, industries are classified into either goods-producing or service-producing supersectors. The goods-producing group comprises three supersectors pertaining to

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Exhibit 3

Upper East Texas Region Employment by Industry Sector, 2002-2012



Rose Capital of the Nation

Tyler, sometimes called the “Rose Capital of the Nation,” is the center of an industry that began in the 19th century. The first rose plant was sold there in 1879, and the first trainload of plants was shipped out of the region in 1917. About one-fifth of all commercial rose bushes produced in the U.S. are grown in Smith County, while more than half of the nation’s rose bushes are packaged and shipped from this area.

Smith County has several advantages in producing roses, including sandy acid soils, relatively abundant rainfall and mild winters. In addition, Tyler is centrally located in the U.S., and its proximity to major transportation corridors has encouraged the industry’s development.

Today, fewer than 25 growers produce about 5 million plants annually on about 500 acres within a 30-mile radius of Tyler. The total wholesale value of the rose plant production and processing industries in the Upper East Texas region is currently estimated at \$50 million per year, accounting for about a third of the estimated \$150 million in ornamental plant production found in and around the Tyler area.

Due to the impact roses have on Tyler, it is not surprising that the city is known as the “City of Roses” and that it is home to the nation’s largest municipal rose garden. From late April until early November, the Tyler Municipal Rose Garden blooms with nearly 40,000 rose bushes exhibiting some 500 varieties of roses. More than 100,000 people from around the world visit the rose garden annually. Tyler also has an annual rose festival and a rose museum to entertain and educate enthusiasts.

Sources: City of Tyler, Texas and Tyler Rose Museum.



Horticulture Industry

Upper East Texas' horticulture industry is booming. According to the Texas A&M University System's Texas AgriLife Extension Service, the region is home to several horticultural industries including the production of field roses, woody nursery stock and greenhouse bedding plants.

In 2001, the estimated production value of these nursery crops in Smith, Cherokee, Henderson and Van Zandt counties was \$245 million, accounting for about 20 percent of Texas' total production of nursery crops. In addition, the region's wholesale nursery producers supply more than 25 percent of the current nursery stock in Texas and serve 25 other states with quality nursery products as well.

Based on sales data obtained from the Texas AgriLife Extension Service, horticultural producers in the Upper East Texas region generated sales of \$932.5 million in 2007. Nearly 65 percent of this amount represented sales to retailers. Smith and Bowie counties accounted for more than 52 percent of total sales (27.9 percent and 24.8 percent, respectively). Gregg (8.3 percent), Anderson (8.2 percent) and Van Zandt (6.9 percent) counties rounded off the top five counties in the region in terms of horticultural sales. In all, these five counties comprise a little more than three-quarters of the region's horticultural sales.

natural resources and mining, construction and manufacturing. The service-producing group comprises eight supersectors providing services ranging from trade, transportation and utilities to information, finance, education, health and government.

The financial activities sector, which includes the finance, insurance and real estate industries, should experience the most significant employment growth between 2002 and 2012, at 44.9 percent.

Professional and business services and the leisure and hospitality sectors will post significant employment growth rates as well, at 41.4 percent and 32.5 percent, respectively. Other regional industries anticipating positive job growth rates by 2012 include the construction sector (32.2 percent), the educational and health services sector (25.5 percent) and the "other services" sector (22.9 percent).²

Among the 11 supersectors covered in **Exhibit 3**, only manufacturing will exhibit less than double-digit employment growth rates

between 2002 and 2012. The supersector is expected to grow by just 9.2 percent.

Economic Structure

All job growth depends upon the region's underlying economic structure. That structure includes multiple factors, including natural resources, labor force characteristics and the composition and concentration of the region's industries. This latter characteristic, which is also called *clustering*, is particularly important since industry clusters give firms within them access to more suppliers and skilled laborers and valuable knowledge and information.³ The benefits that result from high industry concentrations give a region its competitive edge.⁴

One tool that can be used to identify industry concentration is the "location quotient." The location quotient identifies industry concentration by comparing the share of a region's economy attributable to a specific industry to the share that same industry accounts for in the nation's economy.



Dairy Industry

Dairy is big business in the Upper East Texas region, particularly in Hopkins County, where the dairy industry dates back to the early 1900s. From 1940 to 1990, Hopkins County was known as the Dairy Capital of Texas. During its peak, Hopkins County had more than 600 Grade A dairies.

Today, only about 150 Grade A dairies remain in the county. Still, the county's dairies produced more than 500 million pounds of milk in 2007, ranking it among the state's top five milk-producing counties. At current prices, Hopkins County's milk output for this year should translate to \$119 million in sales.

The Hopkins County seat of Sulphur Springs is home to the Southwest Dairy Center and Museum, which is supported by dairy farmers from six states, and holds an annual dairy festival and ice cream freeze-off each June. Neighboring Franklin County is home to the Deal family dairy. Their Jersey dairy herd is famous for producing the Borden Milk Company's mascot Elsie.

According to the Texas Workforce Commission, the region's dairy products manufacturers, Keller's Creamery and Sulphur Springs Cultured Specs, employed more than 150 people and recorded more than \$150 million in sales in 2007.⁵

In essence, the share an industry accounts for in the national economy is seen as the "norm" for that industry, so comparing that norm with its share of a regional economy indicates whether that region tends to have "a lot" or "a little" of a particular industry. Typically, a region will contain "a lot" of industries for which it has some natural or developed competitive advantage, based for instance on a local abundance of a particular resource, climate, an advantageous natural feature (such as proximity to a port), labor skills or some other factor.

A location quotient greater than one signifies that the region has a high concentration of employment in the industry compared to the same industry at the national level. This means that the region is "specialized" in that particular industry. A location quotient of less than one indicates that the region's concentration in the industry is under or less than that of the same industry at the national level. In essence, the region is less specialized in that given industry.

Exhibit 4 lists industries in the Upper East Texas region with location quotients

that exceed one, which signifies that they are specialized, based on 2007 employment. These industries are grouped according to their respective NAICS supersectors and are ranked from the highest to lowest location quotient for each supersector.⁶

The location quotients for these industries ranged in value from 1.15 for mobile food services to 23.02 for the railroad rolling stock manufacturing industry. In the case of mobile food services, the level of employment in this Upper East Texas industry is 15 percent higher than its national counterpart. The railroad rolling stock manufacturing industry, by contrast, has 23 times more workers than the same industry at the national level.

Most Competitive Industries

While location quotients provide important information on regional industry concentrations, the portrait they paint is only a snapshot, a static measure for a particular point in time. To assess the competitive resilience of a regional industry, a more dynamic

Exhibit 4

**Largest Industry Location Quotients
Upper East Texas Region, 2007**
Agriculture, Natural Resources and Mining

NAICS Code	Description	2007 Jobs	2007 LQ
21311	Support activities for mining	9,676	9.76
11311	Timber tract operations	189	7.74
21111	Oil and gas extraction	9,512	7.62
21211	Coal mining	1,173	4.44
11A00	Crop and animal production	32,576	3.42
11331	Logging	1,171	2.69

Construction

NAICS Code	Description	2007 Jobs	2007 LQ
23712	Oil and gas pipeline construction	1,614	5.10
23621	Industrial building construction	1,359	2.01

Manufacturing

NAICS Code	Description	2007 Jobs	2007 LQ
33651	Railroad rolling stock manufacturing	2,190	23.02
32511	Petrochemical manufacturing	1,601	17.30
33341	HVAC and commercial refrigeration equipment	3,480	6.63
32229	Other converted paper product manufacturing	1,064	6.55
33111	Iron and steel mills and ferroalloy mfg.	1,854	5.73
33621	Motor vehicle body and trailer manufacturing	2,941	5.18
33312	Construction machinery manufacturing	1,320	5.02
32192	Wood container and pallet manufacturing	1,082	4.96
33242	Metal tank, heavy gauge, manufacturing	494	4.81
32711	Pottery, ceramics, and plumbing fixture mfg.	382	4.77
33151	Ferrous metal foundries	1,406	4.65
32621	Tire manufacturing	837	4.26
32791	Abrasive product manufacturing	159	4.19
31161	Animal slaughtering and processing	6,919	4.17
31599	Accessories and other apparel manufacturing	289	3.90
33311	Agricultural implement manufacturing	947	3.65
32712	Clay building material and refractories mfg.	459	3.57
31142	Fruit and vegetable canning and drying	935	3.12
33299	All other fabricated metal product mfg.	1,838	2.80
33313	Mining and oil and gas field machinery mfg.	633	2.75
32412	Asphalt paving and roofing materials mfg.	213	2.22
33231	Plate work and fabricated structural products	1,377	2.19
32111	Sawmills and wood preservation	885	2.15
33995	Sign manufacturing	410	1.28



Exhibit 4 (cont.)

**Largest Industry Location Quotients
Upper East Texas Region, 2007**

Trade, Transportation and Utilities

NAICS Code	Description	2007 Jobs	2007 LQ
48821	Support activities for rail transportation	582	6.88
42452	Livestock merchant wholesalers	366	4.94
22131	Water supply and irrigation systems	532	4.22
44521	Meat markets	663	3.75
45393	Manufactured, mobile, home dealers	332	3.53
48611	Pipeline transportation of crude oil	74	2.93
42471	Petroleum bulk stations and terminals	307	2.77
42493	Nursery and florist merchant wholesalers	470	2.22
45291	Warehouse clubs and supercenters	7,911	2.22
42443	Dairy product merchant wholesalers	289	2.06

Financial Activities

NAICS Code	Description	2007 Jobs	2007 LQ
52592	Trusts, estates, and agency accounts	832	7.53
52519	Other insurance funds	903	4.56
52591	Open-end investment funds	691	3.30

Professional and Business Services

NAICS Code	Description	2007 Jobs	2007 LQ
54136	Geophysical surveying and mapping services	173	2.23

Education and Health Services

NAICS Code	Description	2007 Jobs	2007 LQ
62161	Home health care services	12,260	3.22

Leisure and Hospitality

NAICS Code	Description	2007 Jobs	2007 LQ
72233	Mobile food services	47	1.15

Source: Economic Modeling Specialists Inc.

measure is needed. One such measure is “shift-share analysis.”

In this analysis, the change in an industry’s presence in a region is divided into three components: the portion attributable to the overall growth or decline in the nation’s economy (the national growth effect); that attributable to the industry’s national level growth or decline above or below the

national growth trend (the industry mix effect); and that attributable to the region’s competitiveness as a site for the industry (the regional competitiveness effect).

Exhibit 5 lists the most competitive industries in the Upper East Texas region, based on shift-share analysis.⁸ The industries are ranked based on their employment change in the regional competitiveness effect component



Red River Army Depot

The Red River Army Depot (RRAD) was established in August 1941 and was originally intended solely for ammunition storage. But the demands of the war, a healthy labor market, good roads and rail connections and its proximity both to military training areas and southern ports prompted the federal government to expand the depot's mission to include general supply storage and tank repair. Today, RRAD occupies more than 18,000 acres, making it one of the U.S. Army Materiel Command's largest supply and maintenance installations. With the adjacent Lone Star Army Ammunition Plant, the combined installations cover more than 54 square miles.

RRAD has about 600,000 square feet of space for maintenance operations and employs more than 4,300 people. Located 15 miles west of the city of Texarkana in Bowie County, RRAD is one of the region's largest employers. RADD consists of 16 different military and civilian organizations working together to manufacture, repair, refurbish, certify, store and ship equipment and ammunition to America's military personnel throughout the world.

The depot's vast industrial complex can completely overhaul and remanufacture combat systems and tactical vehicles. The flexibility and responsiveness of RRAD's work force, equipment and facilities give the depot a competitive edge within the defense industry and ensure that it will continue to play an important role in national defense.

The depot provides a significant economic impact to the region. In a report from the U.S. Department of Defense's on the Base Realignment and Closure process, the department estimated that 4,175 jobs are dependent upon the operation of the depot.⁷

(and thus the industry's comparative advantage in the region) between 2002 and 2007, and grouped based on their respective NAICS supersectors.

Based on the information presented in **Exhibit 5**, the most competitive industry in Upper East Texas is the "all other specialty trade contractor" industry, which includes businesses that construct outdoor swimming pools, fences, parking lots, pavements and driveways. A total of 1,502 positions of the 2,258-employee increase in this industry are attributable to the region's competitiveness in this industry.

The regional competitiveness effect also played a significant role in employment growth in transportation-related industries such as the general and the refrigerated warehousing and storage industries. These industries are ranked second and fourth, respectively, in terms of competitive effect employment

growth. In fact, this effect accounted for more than 90 percent of the change in industry employment from 2002 to 2007.

According to the exhibit, support activities for mining ranked third, with the regional competitiveness effect accounting for 1,465 of a 4,522-position change in employment.⁹ The majority of this change in employment, however, is not attributable to the competitiveness effect. Instead, about 58 percent (2,634 jobs) of this change in employment is due to the industry mix effect. This means that employment growth in this regional industry is largely due to the fact that the industry grew nationally at a faster rate than the overall economy from 2002 to 2007.

Good Jobs for the Future

Shift-share analysis can identify the region's most competitive industries — those that

The most competitive industry in Upper East Texas is the "all other specialty trade contractor" industry, which includes businesses that construct outdoor swimming pools, fences, parking lots, pavements and driveways.



Exhibit 5

**Most Competitive Industries
Upper East Texas Region, 2007**
Agriculture, Natural Resources and Mining

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
3	21311	Support activities for mining	423	2,634	1,465	4,522
25	21111	Oil and gas extraction	633	726	441	1,800

Construction

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
1	23899	All other specialty trade contractors	189	567	1,502	2,258
10	23712	Oil and gas pipeline construction	55	69	826	950
12	23829	Other building equipment contractors	35	65	751	851
43	23711	Water and sewer system construction	50	46	261	357

Manufacturing

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
8	33651	Railroad rolling stock manufacturing	82	203	910	1,195
14	32511	Petrochemical manufacturing	93	(292)	674	475
19	33329	Other industrial machinery manufacturing	29	(60)	543	512
24	33232	Ornamental and architectural metal products	46	(27)	454	473
33	32121	Plywood and engineered wood product mfg.	35	(21)	346	360
37	33611	Automobile and light truck manufacturing	0	(1)	317	316
38	33311	Agricultural implement manufacturing	52	(54)	313	311
44	33999	All other miscellaneous manufacturing	34	(50)	261	245
45	33621	Motor vehicle body and trailer manufacturing	196	102	255	553
47	33351	Metalworking machinery manufacturing	10	(21)	255	244
50	33341	HVAC and commercial refrigeration equipment	281	(462)	246	65

Trade, Transportation and Utilities

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
2	49311	General warehousing and storage	22	62	1,481	1,565
4	49312	Refrigerated warehousing and storage	0	0	1,356	1,356
7	44411	Home centers	169	331	912	1,412
13	48422	Other specialized trucking, local	79	6	679	764
17	48411	General freight trucking, local	118	50	563	731

Exhibit 5 (cont.)

**Most Competitive Industries
Upper East Texas Region, 2007**

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
27	44611	Pharmacies and drug stores	156	(46)	433	543
28	22111	Electric power generation	145	(335)	419	229
30	42383	Industrial machinery merchant wholesalers	105	(102)	393	396
32	48511	Urban transit systems	5	(1)	377	381
34	42441	General line grocery merchant wholesalers	34	(17)	329	346
39	48621	Pipeline transportation of natural gas	8	(18)	311	301
46	45111	Sporting goods stores	43	25	255	323
48	48423	Other specialized trucking, long-distance	45	35	253	333
49	44521	Meat markets	35	(53)	249	231

Information

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
41	51711	Wired Telecommunications Carriers	140	(515)	292	(83)

Financial Activities

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
15	52399	All other financial investment activities	31	(79)	635	587
16	52211	Commercial banking	432	(122)	589	899
23	52592	Trusts, estates and agency accounts	19	119	468	606
36	52519	Other insurance funds	47	(35)	323	335
42	53241	Heavy machinery rental and leasing	38	93	287	418

Professional and Business Activities

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
6	56142	Telephone call centers	83	(23)	1,147	1,207
18	56172	Janitorial services	294	116	555	965
21	55111	Management of companies and enterprises	247	(62)	482	667
22	56111	Office administrative services	80	318	477	875
26	54161	Management consulting services	126	200	441	767
35	56199	All other support services	30	8	326	364
40	56211	Waste collection	17	44	301	362



Exhibit 5 (cont.)

**Most Competitive Industries
Upper East Texas Region, 2007**

Education and Health Services

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
9	62231	Other (Specialty) hospitals	41	60	884	985
29	61151	Technical and trade schools	13	18	395	426

Leisure and Hospitality

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
20	72211	Full-service restaurants	839	429	515	1,783
31	71391	Golf courses and country clubs	65	93	385	543

Other Services

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
11	81411	Private households	674	1,823	817	3,314

Government

Rank	NAICS Code	Description	Nat Growth Effect	Ind Mix Effect	Competitive Effect	Job Change
5	91100	Federal government, civilian, except postal service	294	(66)	1,223	1,451

Source: Economic Modeling Specialists Inc.

possess the best chances for increased employment opportunities. What types of occupations can Upper East Texans expect to find within these industries? **Exhibit 6** presents a list of “good jobs” for the region’s future, grouping them based on their educational requirements.

Occupations requiring doctoral and professional degrees command the highest median annual earnings, with a weighted average of \$97,966 for the region. Occupations requiring both a college degree and work experience provide the second-highest median annual earnings, with a weighted average of \$71,903. Occupations requiring a master’s degree provide the third-highest median

annual earnings, with a weighted average median wage of \$60,680 annually.

In the Upper East Texas region, occupations requiring postsecondary vocational training provide median annual earnings of

Orgill, Inc.

In 2006, Orgill Inc. selected Kilgore as the site for its sixth distribution center. Orgill provides more than 60,000 lawn, garden and building supply products to small retail stores and individual customers. Its distribution center, expected to be fully operational by the first quarter of 2008, will occupy more than 530,000 square feet on a 65.2-acre plot of land in Kilgore’s Synergy Industrial Park. The facility will employ at least 100 workers when opened and should more than triple its employment numbers to over 300 in the next five years.

Source: Texas Economic Development Council.

Exhibit 6

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Doctoral and First Professional Degrees	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Physicians and surgeons	2,178	2,415	344	237	107	\$217,859
Orthodontists	26	29	6	3	3	159,203
Prosthodontists	21	23	4	2	2	151,237
Oral and maxillofacial surgeons	24	26	4	2	2	144,165
Dentists, all other specialists	23	26	5	3	2	136,406
Medical scientists, except epidemiologists	202	232	60	30	30	113,741
Pharmacists	760	890	196	130	66	107,287
Dentists, general	175	190	31	15	16	105,781
Lawyers	1,296	1,457	216	161	55	100,701
Veterinarians	190	228	50	38	12	75,430
Chiropractors	92	108	21	16	5	62,046
Optometrists	118	140	29	22	7	57,096
Audiologists	43	49	8	6	2	55,913
Clinical, counseling and school psychologists	312	360	58	48	10	54,337
Podiatrists	75	86	13	11	2	51,251
Postsecondary teachers	3,333	3,910	829	577	252	50,600
Total	8,868	10,169	1,874	1,301	573	
Weighted Average Annual Earnings						\$97,966

Master's Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Geoscientists, except hydrologists and geographers	439	509	123	70	53	\$90,461
Physical therapists	700	853	189	153	36	72,344
Occupational therapists	361	436	99	75	24	66,067
Instructional coordinators	388	449	85	61	24	53,965
Counselors, all other	328	369	70	41	29	50,067
Speech-language pathologists	575	654	129	79	50	49,579
Curators	21	24	7	3	4	48,654
Educational, vocational and school counselors	754	848	162	94	68	48,180
Librarians	418	456	92	38	54	45,139
Urban and regional planners	22	24	5	2	3	37,458
Total	4,006	4,622	961	616	345	
Weighted Average Annual Earnings						\$60,680

Degree Plus Work Experience	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Chief executives	4,554	5,241	759	687	72	\$94,464



Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Degree Plus Work Experience	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Engineering managers	342	371	62	29	33	93,059
Natural sciences managers	38	41	7	3	4	83,878
Marketing managers	302	337	53	35	18	82,002
Public relations managers	63	69	11	6	5	79,652
Computer and information systems managers	281	311	49	30	19	77,060
Sales managers	628	694	120	66	54	75,914
Human resources managers, all other	44	48	6	4	2	74,714
Compensation and benefits managers	112	123	20	11	9	74,690
Advertising and promotions managers	62	65	7	3	4	73,615
Financial managers	1,420	1,643	286	223	63	73,219
Education administrators, postsecondary	292	329	53	37	16	72,999
Purchasing managers	85	93	20	8	12	72,553
General and operations managers	7,136	7,643	1,256	507	749	71,483
Training and development managers	51	56	8	5	3	71,455
Administrative services managers	718	793	165	75	90	68,746
Medical and health services managers	1,222	1,378	244	156	88	62,778
Education administrators, elementary and secondary school	1,022	1,134	232	112	120	61,165
Vocational education teachers, secondary school	512	539	115	27	88	43,952
Management analysts	1,586	1,843	297	257	40	40,979
Vocational education teachers, middle school	109	116	22	7	15	40,697
Producers and directors	169	204	49	35	14	40,221
Total	20,748	23,071	3,841	2,323	1,518	
Weighted Average Annual Earnings						\$71,903

Bachelor's Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Physical scientists, all other	28	30	3	2	1	\$138,121
Securities, commodities and financial services sales agents	1,792	2,300	556	508	48	88,080
Physician assistants	166	200	45	34	11	86,994
Chemical engineers	97	106	21	9	12	85,308
Sales engineers	103	119	28	16	12	84,054

Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Bachelor's Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Computer software engineers, applications	225	273	59	48	11	83,315
Health and safety engineers, except mining safety engineers and inspectors	75	78	12	3	9	75,124
Electrical engineers	315	344	63	29	34	74,104
Electronics engineers, except computer	137	150	26	13	13	73,511
Petroleum engineers	249	288	69	39	30	72,233
Civil engineers	491	535	88	44	44	71,319
Mechanical engineers	328	360	64	32	32	69,374
Industrial engineers	296	358	97	62	35	65,640
Engineers, all other	170	182	20	12	8	60,834
Chemists	74	82	17	8	9	60,824
Computer systems analysts	416	482	109	66	43	60,684
Biological scientists, all other	43	47	8	4	4	59,973
Architects, except landscape and naval	242	262	28	20	8	59,904
Environmental engineers	46	51	11	5	6	58,732
Surveyors	180	206	51	26	25	55,690
Database administrators	121	141	25	20	5	52,852
Financial analysts	584	758	177	174	3	52,567
Accountants and auditors	3,633	3,953	503	320	183	50,951
Logisticians	106	122	24	16	8	50,516
Construction managers	3,115	3,380	321	265	56	49,615
Computer programmers	630	649	80	19	61	49,066
Network and computer systems administrators	502	583	132	81	51	47,783
Loan officers	558	608	77	50	27	47,154
Network systems and data communications analysts	275	337	77	62	15	46,950
Market research analysts	391	423	41	32	9	46,487
Medical and clinical laboratory technologists	657	715	107	58	49	46,486
Compensation, benefits and job analysis specialists	232	260	49	28	21	45,465
Athletic trainers	42	48	10	6	4	45,234
Tax examiners, collectors, and revenue agents	116	125	24	9	15	44,866
Business operation specialists, all other	1,552	1,785	308	233	75	44,733
Public relations specialists	390	436	56	46	10	44,248
Credit analysts	106	111	25	5	20	43,947



Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Bachelor's Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Medical and public health social workers	399	478	118	79	39	42,565
Secondary school teachers, except special and vocational education	4,725	5,188	1,167	463	704	42,501
Special education teachers, secondary school	295	327	65	32	33	41,591
Human resources, training and labor relations specialists, all other	241	282	60	41	19	41,370
Dietitians and nutritionists	149	165	29	16	13	41,263
Occupational health and safety specialists	115	126	22	11	11	40,686
Special education teachers, preschool, kindergarten and elementary school	472	548	128	76	52	40,516
Middle school teachers, except special and vocational education	3,597	4,042	835	445	390	40,407
Conservation scientists	71	69	4	-2	6	40,209
Special education teachers, middle school	212	244	56	32	24	40,006
Elementary school teachers, except special education	6,187	7,011	1,477	824	653	39,576
Kindergarten teachers, except special education	833	950	182	117	65	38,629
Social and community service managers	370	412	67	42	25	38,131
Employment, recruitment and placement specialists	282	312	55	30	25	37,671
Total	36,431	41,041	7,676	4,610	3,066	
Weighted Average Annual Earnings						\$49,325

Associate's Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Nuclear medicine technologists	39	42	5	3	2	\$65,635
Diagnostic medical sonographers	98	111	19	13	6	58,759
Dental hygienists	347	408	94	61	33	55,876
Geological and petroleum technicians	76	82	20	6	14	52,993
Engineering technicians, except drafters, all other	122	133	23	11	12	52,282
Registered nurses	9,275	10,761	2,240	1,486	754	51,766
Physical therapist assistants	272	336	81	64	17	50,819
Occupational therapist assistants	92	110	25	18	7	50,242
Environmental science and protection technicians, including health	161	185	54	24	30	49,922

Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Associate’s Degree	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Electrical and electronic engineering technicians	413	446	72	33	39	47,836
Cardiovascular technologists and technicians	94	107	19	13	6	45,471
Radiologic technologists and technicians	974	1,084	176	110	66	45,228
Respiratory therapists	431	500	101	69	32	43,333
Funeral directors	145	150	22	5	17	42,483
Industrial engineering technicians	209	236	47	27	20	38,088
Respiratory therapy technicians	191	195	33	4	29	37,428
Total	12,939	14,886	3,031	1,947	1,084	
Weighted Average Annual Earnings						\$50,673

Postsecondary Vocational Award	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Commercial pilots	155	171	31	16	15	\$54,454.60
Electrical and electronics repairers, commercial and industrial equipment	238	264	66	26	40	47,735.70
Electrical and electronics drafters	122	132	25	10	15	44,596.00
Occupational health and safety technicians	65	71	12	6	6	44,585.33
Healthcare technologists and technicians, all other	230	257	35	27	8	40,583.87
Aircraft mechanics and service technicians	561	615	81	54	27	40,204.00
Mechanical drafters	263	291	63	28	35	38,493.22
Architectural and civil drafters	361	390	77	29	48	37,440.54
Total	1,995	2,191	390	196	194	
Weighted Average Annual Earnings						\$42,239.81

Long-term on-the-job training	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Claims adjusters, examiners and investigators	353	374	54	21	33	\$59,438.27
Gas plant operators	194	201	43	7	36	56,390.62
Petroleum pump system operators, refinery operators and gaugers	163	174	44	11	33	52,280.00
Telecommunications line installers and repairers	982	1,046	182	64	118	49,884.89
Compliance officers, except agriculture, construction, health and safety and transportation	175	189	23	14	9	46,243.14
Crane and tower operators	130	141	21	11	10	40,994.56



Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Long-term on-the-job training	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Tool and die makers	219	239	45	20	25	40,706.50
Electrical power-line installers and repairers	907	990	223	83	140	39,686.40
Telecommunications equipment installers and repairers, except line installers	565	589	84	24	60	38,847.45
Numerical tool and process control programmers	89	98	18	9	9	38,682.00
Millwrights	301	362	79	61	18	37,759.25
Plumbers, pipefitters and steamfitters	1,074	1,170	174	96	78	37,629.44
Coaches and scouts	377	431	91	54	37	37,358.69
Brickmasons and blockmasons	357	374	38	17	21	37,353.00
Total	5,886	6,378	1,119	492	627	
Weighted Average Annual Earnings						\$42,832.16

Moderate-term on-the-job training	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Sales representatives, wholesale and manufacturing, technical and scientific products	1,139	1,268	200	129	71	\$84,985.48
Rotary drill operators, oil and gas	299	333	57	34	23	48,826.00
Cargo and freight agents	164	182	40	18	22	43,934.00
Sales representatives, services, all other	1,324	1,548	302	224	78	42,550.30
Sales representatives, wholesale and manufacturing, except technical and scientific products	4,719	5,226	971	507	464	42,440.96
Advertising sales agents	483	561	113	78	35	39,087.33
Precision instrument and equipment repairers, all other	69	71	9	2	7	37,840.00
Derrick operators, oil and gas	256	286	50	30	20	37,208.00
Total	8,453	9,475	1,742	1,022	720	
Weighted Average Annual Earnings						\$47,196.17

Short-term on-the-job training	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Postal service clerks	263	276	43	13	30	\$44,726.25
Postal service mail carriers	1,142	1,197	222	55	167	43,315.35
Postal service mail sorters, processors and processing machine operators	407	408	40	1	39	42,588.29
Telephone operators	23	21	4	-2	6	39,894.00
Total	1,835	1,902	309	69	242	

Exhibit 6 (cont.)

**“Good Jobs”
Upper East Texas Region, 2007-2012**

Short-term on-the-job training	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Weighted Average Annual Earnings						\$43,373.28
Work Experience in a Related Field	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
Industrial production managers	589	626	154	37	117	\$79,177.25
Transportation inspectors	50	57	15	7	8	70,356.00
Transportation, storage and distribution managers	269	302	65	33	32	65,857.17
Purchasing agents and buyers, farm products	25	27	3	2	1	60,791.00
Managers, all other	7,811	9,081	1,292	1,270	22	60,340.36
Postmasters and mail superintendents	106	111	18	5	13	59,135.40
First-line supervisors/managers of fire fighting and prevention workers	62	71	19	9	10	56,352.50
First-line supervisors/managers of non-retail sales workers	2,960	3,352	435	392	43	54,297.43
First-line supervisors/managers of mechanics, installers, and repairers	2,012	2,192	408	180	228	47,388.96
First-line supervisors/managers of transportation and material-moving machine and vehicle operators	751	835	156	84	72	46,570.83
Fire inspectors and investigators	77	88	20	11	9	45,883.00
Detectives and criminal investigators	317	373	91	56	35	45,883.00
First-line supervisors/managers of construction trades and extraction workers	4,330	4,777	585	447	138	44,901.70
Food service managers	1,559	1,845	370	286	84	44,113.75
Purchasing agents, except wholesale, retail and farm products	663	716	120	53	67	43,287.64
First-line supervisors/managers of police and detectives	121	137	35	16	19	42,305.63
Agricultural inspectors	71	77	15	6	9	41,600.00
First-line supervisors/managers of production and operating workers	3,653	3,901	629	248	381	40,707.14
Cost estimators	480	540	99	60	39	40,515.44
Wholesale and retail buyers, except farm products	359	378	41	19	22	39,224.00
First-line supervisors/managers, protective service workers, all other	70	79	13	9	4	39,123.00
Total	26,335	29,565	4,583	3,230	1,353	
Weighted Average Annual Earnings						\$51,219.76

Sources: Economic Modeling Specialists Inc. and Texas Workforce Commission.



\$42,239. Occupations requiring relevant work experience or an associate's or bachelor's degree yield median annual earnings of between \$49,000 and \$51,000.

For the purpose of this analysis, a "good job" is one for which the weighted average of median annual earnings, as reported by the Texas Workforce Commission for the workforce development areas comprising the Upper East Texas region, exceeds the state's 2007 per capita personal income level of \$37,187.¹⁰ In the Upper East Texas region, 171 occupations pay more than this amount.

It should be noted that many occupations that meet the "good jobs" definition do not require a college degree. A number of occupations requiring related work experience, on-the-job-training or postsecondary vocational training also provide good wages.

Comptroller Assistance

One of the many functions of the Comptroller's office is to provide economic development information to local governments and other groups, and to analyze demographics, the labor force and other economic factors needed to generate local economic growth. Through its Texas EDGE (Economic Data for Growth and Expansion) program, the agency can identify occupational and industry trends and their effects on local and regional economies.

The Comptroller's office also can provide local demographic data, identify business clusters and provide maps of regional infrastructure including highways, railroads and other public facilities. For assistance, please visit www.window.state.tx.us/texasedge or e-mail texas.edge@cpa.state.tx.us.

Since August 2008, the Comptroller's office has responded to 301 Texas EDGE requests from city and county government officials, economic development corporations, private businesses and members of the media.¹¹ These requests have covered many topics, including demographics, economic development, economic modeling and taxes.

The agency also provides local governments with information about tax-related programs and helps them identify opportunities to raise funds for economic development efforts through property, sales and franchise tax revenues, exemptions and credits. It also provides information on special assessments and other opportunities related to disaster relief.

Exhibit 7 lists 25 occupations expected to have the highest number of job openings between 2007 and 2012. The occupation most in demand, retail sales, is expected to create 4,653 openings between 2007 and 2012, with median annual earnings of approximately \$18,288.¹²

Eleven of the 25 occupations with the most openings, accounting for about 57 percent of the total, require short-term, on-the-job training. Of the remaining 14 occupations, eight require educational training beyond high school or work experience in a relevant field. These eight occupations provide a minimum median annual salary of at least \$30,000.

The Comptroller's Local Government Assistance and Economic Development Division provides free risk assessments to local governments. These give local officials reasonable assurance that risks to local objectives have been identified and identify the controls and mitigating factors associated with each.

171 occupations in Upper East Texas pay more than the state's 2007 per capita personal income level of \$37,187.

Finally, the Comptroller's State Energy Conservation Office (SECO) can help local governments slash their energy costs and adopt cost-effective clean energy technologies. SECO offers local governments a free

preliminary energy audit of their facilities. These audits provide recommendations for reducing electricity consumption by improving the efficiency of heating and air conditioning systems and lighting.

Exhibit 7

Occupations with the Most Projected Openings Upper East Texas Region, 2012

Rank	Description	2007 Jobs	2012 Jobs	Total Job Openings	Growth	Replacement	Median Annual Earnings
1	Retail salespersons	18,128	20,438	4,653	2,310	2,343	\$18,288
2	Cashiers, except gaming	12,580	12,977	3,567	397	3,170	14,940
3	Combined food preparation and serving workers, including fast food	11,213	13,224	3,071	2,011	1,060	14,102
4	Maids and housekeeping cleaners	10,496	12,872	2,650	2,376	274	14,614
5	Truck drivers, heavy and tractor-trailer	9,960	11,275	2,054	1,315	739	32,177
6	First-line supervisors/managers of retail sales workers	9,685	10,430	1,187	745	442	30,176
7	Office clerks, general	9,617	10,732	1,923	1,115	808	19,654
8	Registered nurses	9,275	10,761	2,240	1,486	754	51,766
9	Secretaries, except legal, medical, and executive	9,102	9,610	1,142	508	634	22,307
10	Laborers and freight, stock and material movers, hand	8,420	9,064	1,933	644	1,289	20,612
11	Managers, all other	7,811	9,081	1,292	1,270	22	60,340
12	Bookkeeping, accounting and auditing clerks	7,612	8,403	1,251	791	460	27,032
13	General and operations managers	7,136	7,643	1,256	507	749	71,483
14	Personal and home care aides	6,362	8,126	2,160	1,764	396	13,658
15	Waiters and waitresses	6,198	7,389	2,848	1,191	1,657	13,827
16	Elementary school teachers, except special education	6,187	7,011	1,477	824	653	39,576
17	Janitors and cleaners, except maids and housekeeping cleaners	5,952	6,696	1,240	744	496	16,790
18	Customer service representatives	5,814	6,809	1,759	995	764	22,760
19	Licensed practical and licensed vocational nurses	5,544	6,237	1,442	693	749	34,916
20	Child care workers	5,440	6,379	1,104	939	165	14,003
21	Home health aides	4,865	6,072	1,409	1,207	202	15,840
22	Secondary school teachers, except special and vocational education	4,725	5,188	1,167	463	704	42,501
23	Real estate sales agents	4,353	5,494	1,161	1,141	20	35,531
24	Correctional officers and jailers	4,254	4,876	1,108	622	486	28,006
25	Real estate brokers	4,143	5,263	1,125	1,120	5	78,186

Sources: Economic Modeling Specialists Inc. and the Texas Workforce Commission.



Shopping and Retail in Upper East Texas

Businesses in the Upper East Texas region generated more than \$38.8 billion in gross sales in 2006 and \$43.4 billion in 2007. About 24.4 percent, or more than \$9.4 billion, was subject to state and local sales taxes in 2006; in 2007, more than \$10 billion was taxed. State sales taxes levied in the region totaled \$591 million in 2006 and \$635 million in 2007.

Gross Sales and Sales Tax, Upper East Texas Region, 2006 and 2007

County	Gross Sales 2006	Gross Sales 2007	Amount Subject to Tax 2006	Amount Subject to Tax 2007	Sales Tax 2006	Sales Tax 2007
Gregg	\$8,495,399	\$11,818,894	\$2,152,539	\$2,322,116	\$134,534	\$145,132
Smith	6,646,663	6,516,042	2,353,913	2,439,097	147,120	152,444
Titus	3,247,579	3,858,156	270,948	504,985	16,934	31,562
Anderson	3,960,450	3,630,380	466,573	488,035	29,161	30,502
All Other Counties	16,471,287	17,578,547	4,213,394	4,409,137	263,337	275,571
TOTAL	\$38,821,379	\$43,402,020	\$9,457,367	\$10,163,370	\$591,085	\$635,211

Note: Amounts in Millions
Source: Texas Comptroller of Public Accounts.

The region had more than 51,000 retail employees in 2006 and more than 52,000 in 2007, earning total wages of more than \$1.2 billion in 2006 and nearly \$1.3 billion in 2007. Smith County had the highest number of retail jobs, followed by Gregg and Bowie counties. The annual average salary of the region's retail employees was \$24,182 in 2006 and \$24,607 in 2007, an increase of 1.8 percent.

Retail Employees and Wages, Upper East Texas Region, 2006 and 2007

County	Employees 2006	Total Wages 2006	Employees 2007	Total Wages 2007
Smith	12,925	\$329,383,599	13,431	\$342,563,022
Gregg	9,135	262,471,272	9,356	273,809,933
Bowie	5,499	124,544,730	5,734	133,994,602
Harrison	2,667	64,647,776	2,564	59,156,238
All Other Counties	21,342	465,967,109	21,268	478,713,249
TOTAL	51,568	\$1,247,014,486	52,353	\$1,288,237,044

Source: Texas Comptroller of Public Accounts.

Tyler's 630,000-square-foot Broadway Square Mall has a trade area population of more than 281,000 people with an average household income of more than \$59,000. (A trade area is the geographical area from which frequent shoppers originate.)

The Longview Mall is slightly larger at 650,000 square feet, and with a trade area of nearly 274,000 people who have an average household income of about \$56,000. And Texarkana's Central Mall, with 686,000 square feet of retail shopping area, serves nearly 460,000 people from 18 counties in three states. The mall is located on the Texas side of the state border, and consequently contributes to Texas sales tax revenue.¹³

Industry Profile – Food Processing

Within the region's manufacturing industries, various types of food products manufacturing play an important role.

Upper East Texas' fruit and vegetable, dairy, meat and bakery production industries employed more than 9,200 people and paid more than \$300 million in wages in 2007. These industries employed more than 68,000 in Texas, and paid annual wages in excess of \$2 billion. Regional employment in these four industries makes up about 14 percent of the statewide total.¹⁴

Exhibit 8 shows where these industries operate in the Upper East Texas region.

An analysis of location quotients indicates that the region has a comparative advantage in two of these four food production industries. Fruit and vegetable food manufacturing (with a location quotient of 1.14 in 2007) and animal slaughtering and processing (1.31 in 2007) have a higher concentration of employment than the state share in these industries. In other words, because the regional share of employment for these industries is greater than the state share, these industries are net exporters of these manufactured goods.

Of the four industrial groups listed above, animal slaughtering and processing was by far the region's largest employer. In 2007, the industry employed nearly 6,900 people in the region and paid more than \$200 million in wages.

While still employing a significant number of people in the region, the dairy products industries had the lowest employment, with about 500 positions and \$19 million in wages in 2007.

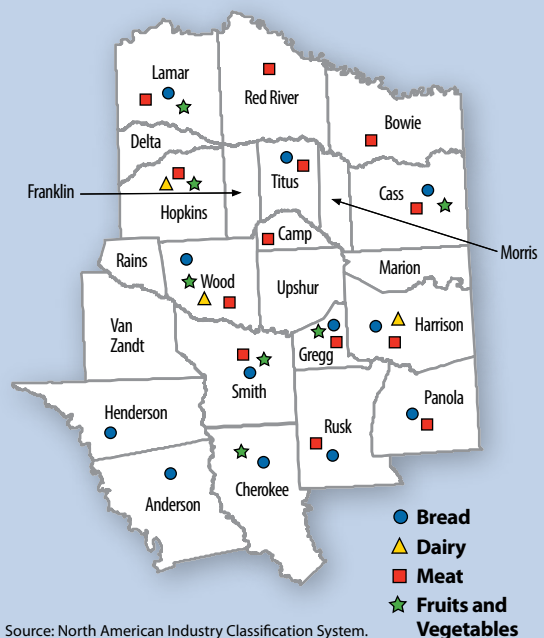
Sara Lee Bakery Group, which produces bread and other bakery products, has operations in Paris, Texas. The Paris location generated more than \$100 million in sales in 2007 and employs more than 500 people. Campbell's Soup, J&M Poultry, Tyson Poultry, Keller's Creamery and John Soules Inc. all have presences in the region as well, employing more than 1,300 and generating in excess of \$760 million in annual sales.¹⁵

Pilgrim's Pride, a food products manufacturer, has been headquartered in Pittsburg, Texas since 1946 and its operations are deeply rooted in the Upper East Texas region. Today, Pilgrim's Pride is the largest poultry producer in the nation.¹⁶ During fiscal 2007, the company employed about

55,000 and generated total sales of \$7.6 billion. In Mount Pleasant, Texas, site of one of the nation's largest prepared-foods plants, Pilgrim's Pride can produce 2,000 different products and more than 7 million pounds of finished goods per week. Globally, the company exports to more than 80 countries and annually processes about 9 billion pounds of poultry.¹⁷

The Upper East Texas region is not immune to rising energy and feed prices. According to the U.S. Department of Agriculture's Economic Research Service, beef and poultry prices have risen from May of last year by 1.5 and 4.5 percent, respectively. Both increases are attributed to higher feed and energy prices. Increasing costs for these two major factors of production (feedstock and energy) have affected meat production employers and their profit margins. Several have scaled back on production to offset higher costs and others have considered changes in their operations. For example, Pilgrim's Pride CEO recently explained that due to "unprecedented challenges," the company is going to review all production facilities to ensure optimal efficiency.¹⁸

Exhibit 8
Upper East Texas Food Products Manufacturing, 2007



Source: North American Industry Classification System.



Industry Profile – Wood Products

In 2007, the Upper East Texas region was home to 220 businesses and 6,800 jobs associated with the forest industry, including forestry, logging, wood product manufacturing and paper product manufacturing. These firms paid nearly \$294 million in wages in that year (Exhibit 9).

The region is home to more than a fourth of Texas' forestry and logging jobs. Eighty-eight firms accounted for 550 forestry and logging jobs and paid \$22 million in wages in 2007.¹⁹ Jobs in the forestry

and logging industry are divided between different stages in the production cycle, including timber tract operations that require specialized machinery, facilities for gathering forest products and logging. Logging accounts for most of the industry's jobs.

Paper manufacturing is a vertically integrated industry, meaning that individual companies account for multiple parts of the manufacturing process. The Upper East Texas region is home to two of Texas' largest paper manufacturing companies, International Paper in Queen City and Kimberly-Clark in Paris. International Paper is a global leader in paper and packaging products, and Kimberly-Clark is a manufacturer of paper products, including Kleenex brand tissues.

Texas paper exports totaled nearly \$1.6 billion in 2007, making it the fifteenth largest export market in the state.²⁰

Exhibit 10 shows companies in the Upper East Texas region associated with the forest industry.

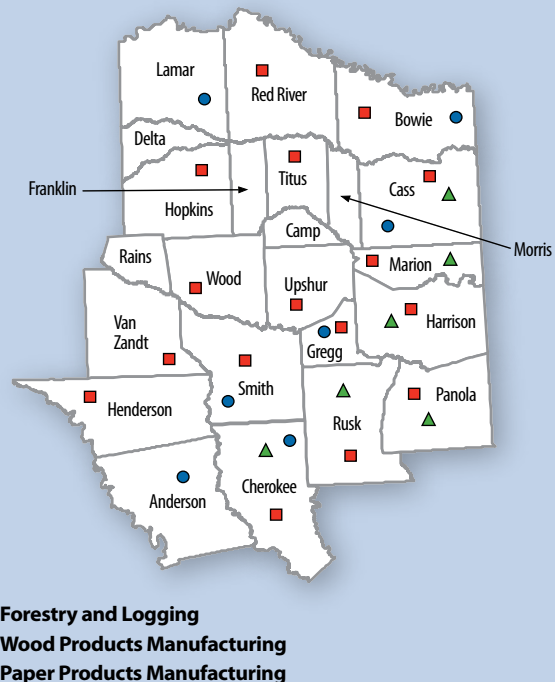
Exhibit 9
Jobs, Wages and Establishments Associated with Forest Industry Texas and Upper East

Upper East	2007 Employment	2007 Wages	Annual Wages per Employee	Establishments
Forestry and Logging	550	21,808,176	\$39,651.23	88
Wood Products Manufacturing	3,576	107,471,585	30,053.58	112
Paper Products Manufacturing	2,709	164,350,761	60,668.42	20
TOTAL	6,835	293,630,522		220

Texas	2007 Employment	2007 Wages	Annual Wages per Employee	Establishments
Forestry and Logging	2,090	82,053,538	\$39,260.07	346
Wood Products Manufacturing	26,917	983,850,449	36,551.27	843
Paper Products Manufacturing	20,127	1,065,159,858	52,921.94	309
TOTAL	49,134	2,131,063,845		1,498

Sources: Texas Workforce Commission and Texas Comptroller of Public Accounts.

Exhibit 10
Forest Industry by County, Upper East Texas, 2007



Source: North American Industry Classification System.



Endnotes

- ¹ U.S. Department of Labor, “NAICS Supersectors for CES Program,” <http://www.bls.gov/sae/saesuper.htm>. (Last visited September 23, 2008.)
- ² The “Other Services” sector represents all industries covered under the two-digit NAICS code 82. These industries are primarily engaged in the provision of repair and maintenance services for automotive, electronic, commercial and industrial machines and equipment. The sector also includes personal services such as laundry, dry cleaning, hair, nail, and skin care, funeral parlors and organizations that have religious, social advocacy, civic, political and business purposes.
- ³ National Governors Association, *A Governor’s Guide to Cluster-Based Economic Development* (Washington, D.C., 2002), p. 9, http://www.eda.gov/ImageCache/EDAPublic/documents/pdfdocs/nga_5clusters_2epdf/v1/nga_5clusters.pdf. (Last visited September 23, 2008.)
- ⁴ Laila Assanie and Mine Yücel, “Industry Clusters Shape Texas Economy,” *Southwest Economy* (September/October 2007), pp. 1-2, 5, 8, <http://dallasfed.org/research/swe/2007/swe0705b.cfm>. (Last visited September 23, 2008.)
- ⁵ Texas Workforce Commission, Standardized Occupational Components for Research and Analysis of Trends in Employment System (SOCRATES), “Employer Search,” <http://socrates.cdr.state.tx.us/>. (Last visited September 23, 2008.) Custom query for LWDA Region 07 (North East Texas) and LWDA Region 08 (East Texas) employer contacts.
- ⁶ U.S. Department of Labor, “NAICS Supersectors for CES Program.”
- ⁷ Texas Comptroller of Public Accounts. “Bouncing Back From BRAC.” *Fiscal Notes*. (July/August 2006), http://www.window.state.tx.us/comptrol/fnotes/fn0607_08/brac.html. (Last visited September 23, 2008.)
- ⁸ For the purpose of this analysis, “most competitive” industries are those that posted the largest job growth (positive job changes) in the competitive effect component of the shift-share analysis between 2002 and 2007.
- ⁹ This industry represents businesses that provide drilling core sampling, and geological observation services to the mining industry.
- ¹⁰ U.S. Department of Commerce, Bureau of Economic Analysis, “State Personal Income 2007,” *News Release*, (March 26, 2008), <http://www.bea.gov/newsreleases/regional/spi/2008/pdf/spi0308.pdf>. (Last visited September 23, 2008.) See “Table 1A. Per Capita Personal Income, Person Income, and Population, by State and Region, 2006-2007.”
- ¹¹ Based on e-mail correspondence with Mr. Andy Liebler, Senior Policy Analyst of the Regional Fiscal Analysis Section of the Texas Comptroller’s Office, August 21, 2008. These requests fall under categories such as economic development, sales tax, demographics, etc.
- ¹² Median annual earnings were estimated by multiplying the median hourly earning for the industry by 2,080 work hours, which is the average number of work hours in a week (40) multiplied by the number of weeks in a year (52). The exceptions to this estimate are professions related to elementary, middle school and secondary education, which generally involve about nine months of work. These annual wages were obtained from the Texas Workforce Commission.
- ¹³ Simon Property Group, “Broadway Square, Tyler, Texas,” p. 1, http://www.simon.com/Mall/LeasingSheet/0344_BroadwaySquare_PropFactSheet.pdf; Simon Property Group, “Longview Mall, Longview, Texas,” p. 1, http://www.simon.com/Mall/LeasingSheet/2356_LongviewMall_PropFactSheet.pdf; and “Central Mall, Texarkana, Texas,” pp.1-2, <http://www.centralmalltexarkana.com/mimages/factsheets.pdf>. (Last visited September 23, 2008.)
- ¹⁴ Texas Workforce Commission, “Quarterly Employment and Wages (QCEW),” <http://www.tracer2.com/cgi/dataanalysis/AreaSelection.asp?tableName=Industry>. (Last visited September 23, 2008). Custom query for Upper East Texas’ fruit and vegetable, dairy, meat, and bakery production industry data.
- ¹⁵ Texas Workforce Commission, Standardized Occupational Components for Research and Analysis of Trends in Employment System (SOCRATES), “Employer Search.”
- ¹⁶ Pilgrim’s Pride, “The Pilgrim’s Story,” p. 1, <http://www.pilgrimspride.com/aboutus/pilgrimsstory.aspx>. (Last visited September 23, 2008.)
- ¹⁷ Pilgrim’s Pride, “About Us,” p. 1, <http://www.pilgrimspride.com/aboutus/>. (Last visited September 23, 2008.)
- ¹⁸ Dan Garcia, “Pilgrim’s Pride Cuts 600 Jobs at Arkansas Plant,” (July 15, 2008), pp. 1-2, <http://www.kauz.com/news/25467844.html>. (Last visited September 23, 2008.)
- ¹⁹ Texas Workforce Commission, “Quarterly Employment and Wages (QCEW). Custom query for Upper East Texas’ forestry industry with Comptroller’s office calculations.
- ²⁰ Texas Office of the Governor, “Texas Industry Profile—Forestry and Logging NAICS 113 (private industry only),” p. 1, <http://www.texasindustryprofiles.com/pdf/empsnapshot/113.pdf>. (Last visited September 23, 2008); Texas Office of the Governor, “Texas’ Industry Profile—Paper Manufacturing NAICS 322 (private industry only),” p. 1, <http://www.texasindustryprofiles.com/pdf/empsnapshot/322.pdf>. (Last visited September 23, 2008.)