



ORANGE COUNTY ECONOMIC DEVELOPMENT CORPORATION

# Industry Growth Strategy:

## *Logistics, Distribution & Warehousing*

Prepared for:  
Orange County  
Economic Development Corp.

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2/28/2022

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# Introduction & Project Overview

## Project Overview

Based on interviews, desktop analysis and VisionFirst Advisors and Foremost Quality Logistics' (FQL) knowledge of the Orange County region and the Orange County Economic Development Corporation (OCEDC), this industry growth strategy identifies activities, outlines goals and provides suggested tactics for OCEDC to implement to recruit Logistics, Distribution and Warehousing businesses.

To develop a meaningful and effective growth strategy that Orange County can successfully implement, it was important to not only gather comprehensive data and trends, but also to seek stakeholder input from a variety of voices, providing context to the analytics.

VisionFirst and FQL's project approach included:

- Gathering feedback through conversations with numerous community leaders, business leaders, and staff regarding the community's current economic development efforts and suggestions for moving forward
- Analyzing data trends and projections regarding the county's growth, gaps, and opportunities as compared to the region, state, and nation
- Evaluating the county's Logistics, Distribution, and Warehousing industry sector
- Assessing the region's assets, both tangible and intangible
- Developing messaging for outreach and asset development efforts
- Developing a suite of goals and strategies for the county to use for increased industry-specific economic prosperity.





### **Key differences between Logistics and Distribution //**

- *Logistics refers to the overall planning and organization regarding the movement, storage and inventory control of goods.*
- *Distribution refers to the retrieval, preparation and movement of the goods.*

### **Key differences between Warehousing and Distribution //**

- *A warehouse is a planned space, usually a large commercial building, for the handling and storage of goods.*
- *Distribution is the process of making the goods available for use by end consumers.*



## 2021 State of Logistics

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Before identifying strategies that will enable Orange County to recruit within Logistics, Warehousing and Distribution, it is first important to understand the current state of the industry, especially given the acceleration of trends and the disruption caused by the pandemic.

2020 was an unpredictable year, with sudden stops, starts, dips, and rises in the industry. The year exposed systems that were optimized for cost and efficiency but were fragile and lacked resiliency. The ongoing flux in the supply chain makes its short- and long-term future unclear.

According to the [Council of Supply Chain Management Professionals' 32nd Annual State of Logistics](#) report, U.S. business logistics costs fell 4 percent to \$1.6 trillion in 2020 (7.4 percent of 2020 U.S. GDP).

The main driver for the drop was a decrease in inventory carrying costs, which fell 15 percent due to the immediate decline in manufacturing and commerce caused by pandemic shutdowns. This resulted in a corresponding decline in transportation volumes.

At the same time, costs for many transportation and warehousing services rose as the industry dealt with capacity shortages, port congestion, and major shifts in consumer demand, leading to many assets either remaining undeployed or being redeployed inefficiently.

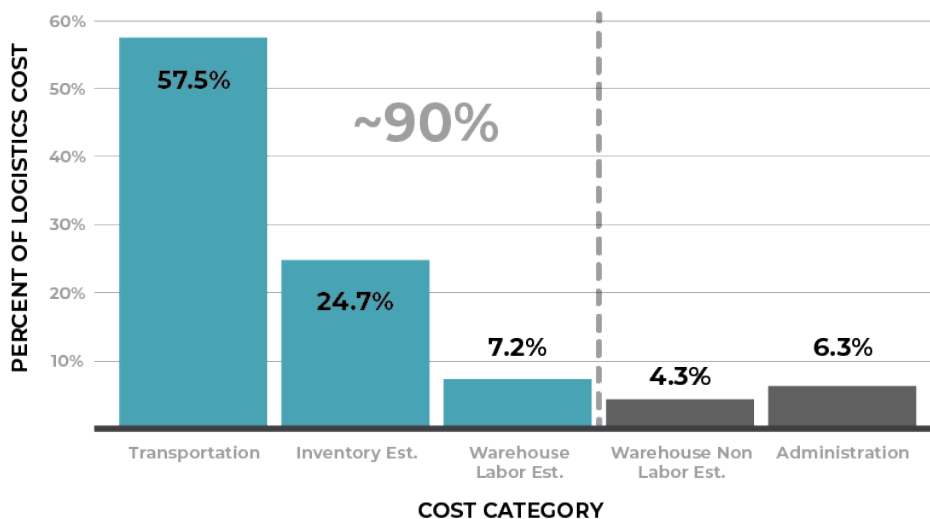
### SECTOR-BY-SECTOR BREAKDOWN

As the market shifted, some segments fared better than others.

- **Motor Carrier Freight:** Trucking costs fell by 1.6 percent year over year. Continuing economic recovery kept rates high through the end of 2021. The pandemic forced the industry to finally embrace digitization. Digital technologies such as online freight booking and digital materials billing may lead to improved service levels.
- **Logistics/Parcel Delivery:** Homebound consumers led to 33 percent growth in e-commerce in 2020—accounting for nearly 15 percent of total retail sales. While this increase fueled a nearly 25 percent year-over-year increase in parcel shipping spend, it also forced shippers to adjust their delivery offerings and solutions.

- **Rail:** Volumes and revenue were down overall for the rail industry, with spending dropping 11 percent year-over-year. This drop was the result of reduced volumes in industrial products and coal. Intermodal saw a smaller decline as high trucking prices forced some shippers to switch modes.
  - **Air Freight:** Air cargo costs experienced a 9 percent year-over-year increase, and rates remained high through mid-2021. Airlines have not recovered from the cancellation of passenger flights in 2020, and demand exceed supply through the end of 2021.
  - **Water:** Logistics costs associated with on-the-water shipping dropped nearly 30 percent year-over-year. Rates and volumes climbed in late 2020 as retailers restocked, and they have remained high.
  - **Pipeline:** The pandemic triggered a sudden burst in the oil industry. The gas industry was one of the few areas that remained unaffected by the pandemic, growing 1.7 percent year-over-year.
  - **Warehousing:** The e-commerce boom resulted in a high demand for warehousing space, especially in urban locations. At the same time, warehousing flows became more complicated and labor conditions tightened, leading more warehouses to adopt automation.
- Freight Forwarding:** Even with volume declines in freight forwarding, higher rates resulted in higher 2020 revenues. Freight forwarding is expected to see fierce competition as traditional providers face off against new digital startups while carriers seeking to become end-to-end providers and large players such as Amazon and Walmart continue to grow. Future mergers and acquisitions are likely.
- **Third-Party Logistics (3PL) Providers:** While many 3PL providers saw higher revenue last year, some also experienced cost increases, which reduced their profitability. As supply chains and logistics become more complex, the sector is forecasted to grow.

### Logistics Cost Breakdown – CSCMP 2020



**Supply chain is the driver of industrial real estate.**

**~90% of logistics costs is not rent.**

Sources: Tim Feemster, FQI, S.T. Kearney Analysis & CSCMP 2020 Report

# IMPRESSION

## First Impressions

*Communities experience difficulties seeing their surroundings as clients, guests, prospective industries and newcomers to the area see them. The information below outlines first impressions as perceived by a site selector.*



### 01 TRAFFIC & CONNECTIVITY CONCERNS

While scheduled to be only a temporary disruption for the region, the I-10 corridor construction results in frequent traffic congestion. The primary source of congestion is the replacement of numerous bridges between Orange County, Texas, and Lake Charles, Louisiana. In the short term, freight trucks will likely experience challenges in traveling the roads in an efficient manner.



### 02 QUALITY OF PLACE CHALLENGES

With Orange County's proximity to natural and man-made resources, such as the Sabine River and the Shangri La Botanical Gardens and Nature Center, as well as a historic, charming downtown, there is opportunity for population growth with the addition of cultural amenities. Additionally, increasing affordable housing and healthcare options would help attract and retain employers and employees.



### 03 LOW WORKFORCE COORDINATION

There is strong support of and belief in OCEDC staff's good working relationships with education stakeholders. Yet there remains a need to connect education with industry leaders to improve the talent pipeline. OCEDC should connect and facilitate those strategic partnerships.



## Stakeholder Feedback

### YOU SPOKE, WE LISTENED

*VisionFirst and FQL met with nearly fifty stakeholders—elected officials, existing business leaders, OCEDC staff and board members, and education partners—both in-person and virtually to gain a better understanding of current operations, programs, products, and services*

Meetings with business and community stakeholders enabled VisionFirst and FQL to gain insights through the lens of each group’s focus into how OCEDC and its partners can find long-term success. These conversations also helped identify challenges faced due to macroeconomic trends and local issues, especially as the nation and community adjust to and recover from the pandemic.

Each stakeholder meeting prompted productive dialogue about the county’s future and identified both critical issues and attainable opportunities. During the conversations, VisionFirst sought answers to questions around such topics as:

- What is the definition of economic development for Orange County?
- What do OCEDC’s internal and external customers think of the organization?
- What are the barriers to success?
- Who are the partners for the county’s economic development efforts?
- What responsibilities belong to the OCEDC?
- What does success look like for the OCEDC and economic development in Orange County overall?
- How will the OCEDC measure success?

Although the meetings focused on OCEDC and its role in leading local economic development, the discussion also covered the needs in the broader community. Key findings from the meetings are presented in aggregate on the following pages and have been grouped by the main themes that resulted from the stakeholder conversations.



**The comments listed are a sampling of the meeting outcomes from local leaders and do not reflect VisionFirst’s or FQL’s opinion.** Whether or not it is factual, this feedback is the augmented perception of key stakeholders and should be considered moving forward.

Pros	Cons
<b>Partnership Support/Engagement</b>	
<ul style="list-style-type: none"> <li>- There is overwhelming support of OCEDC organization and staff.</li> <li>- Well-established, recognizable companies thrive within the region.</li> <li>- Companies are growing and making large investments in the community.</li> </ul>	<ul style="list-style-type: none"> <li>- Permitting can be challenging, as inspectors use different codes.</li> <li>- Individual water treatment plants require high upkeep. The county should consolidate to one regional plant.</li> </ul>
<b>Infrastructure/Sites/Buildings</b>	
<ul style="list-style-type: none"> <li>- There are two existing shipping yards—one for construction and one for repair.</li> <li>- Port of Orange offers a variety of assets.</li> <li>- Orange County is served by Entergy (MISO).</li> <li>- There is ease of permitting throughout the county.</li> <li>- Land is less expensive than in other areas of Texas and Louisiana.</li> <li>- There is waterway access to inland and deep-water ports.</li> <li>- There are three Class 1 railroads in the area.</li> </ul>	<ul style="list-style-type: none"> <li>- Water drainage throughout the county is a constant issue.</li> <li>- The amount of project activity in the county is outpacing planned infrastructure improvements.</li> <li>- Broadband is lacking throughout the county.</li> </ul>
<b>Quality of Life/Place</b>	
<ul style="list-style-type: none"> <li>- Stark Foundation makes significant investments in the community.</li> <li>- The Stark Museum of Art is a major amenity.</li> <li>- Orange County has a lower cost of living than other areas of Texas.</li> </ul>	<ul style="list-style-type: none"> <li>- Hurricanes occur with regularity.</li> <li>- The community lacks shopping and recreational activities; there is no real downtown area.</li> <li>- Affordable housing is lacking within the county.</li> <li>- There are few healthcare options.</li> </ul>
<b>Workforce/Education</b>	
<ul style="list-style-type: none"> <li>- Lamar State College is a major asset.</li> <li>- The public school system is excellent.</li> <li>- There are a variety of CTE programs, including Maritime, Marine Mechanics, and Truck Driving.</li> </ul>	<ul style="list-style-type: none"> <li>- Parts of the labor force will transfer for minimal wage increases (\$1-\$2/hr.).</li> <li>- Younger workers are leaving the county.</li> <li>- More coordination is needed between education and industry partners.</li> <li>- There is a lack of focus on skill gaps.</li> </ul>



## Data-At-A-Glance

When evaluating a community for strategic plans, sector strategies, or site selection, VisionFirst Advisors conducts a high-level data analysis of the county and the region. Emphasis is placed on labor force participation rates, educational attainment, the talent pipeline, location quotients, and leading industries. This data provides a baseline of information to educate, inform, and better position the community for target industry growth. VisionFirst compiled data from numerous trusted state and national sources.

### Economic Overview

**FIGURE 1: COMMUNITY MARKETING & POSITIONING**

Source: <a href="#">JobsEQ®</a>	Orange County, Texas	Orange County Regional 45-Minute Labor Draw	Texas	U.S.
<b>DEMOGRAPHICS</b>				
Population	84,069	631,174	28,260,856	324,697,795
*Population Annual Growth Rate (Total Annual Value)	0.1% (86)	**0.3% (2,318)	1.5% (411,886)	0.6% (2,015,698)
People Per Square Mile	249.9	90.8	111.0	92.9
Median Age	37.9	36.9	34.6	38.1
<b>LABOR FORCE &amp; EMPLOYMENT</b>				
Civilian Labor Force Participation Size (16 & Over)	39,653	286,456	13,962,458	163,555,585
Labor Participation Rate (Civilian population 16 & Over)	60.5%	58.0%	64.5%	63.2%
Prime-Age Labor Force Part. Rate (Civilian population 25-54)	80.1%	74.5%	80.6%	82.1%
Veterans (Age 18-64)	5.0% 2,522	5.0% 13,482	4.9% 846,005	4.6% 9,143,042
Unemployment Rate October 2021 (Seasonally adjusted)	7.6%	6.7%	5.0%	4.8%
Unemployment Rate October 2020 (Seasonally adjusted)	10.0%	10.1%	7.1%	7.2%
Total Employment (2021 Q2)	24,103	296,232	-	-
Four-Quarter Moving Average Employment (2020 Q2)	6.7%	5.2%	7.7%	9.0%

Mean Commute Time (Minutes)	24.2	22.6	26.6	26.9
<b>EDUCATIONAL ATTAINMENT, AGE 25-64</b>				
Educational Attainment (Age 25-64 w/H.S. Diploma or Higher)	89.7%	87.2%	84.7%	89.1%
Educational Attainment (Age 25-64 w/Assoc Degree or Higher)	27%	28.3%	38.3%	42.6%
Spending Per Pupil	\$10,295	**10,295	\$9,670	\$12,654
Pupil/Teacher Ratio	14.3	**14.3	15.1	15.9
No High School Diploma	10.3%	12.8%	15.3%	10.9%
High School Graduate	36.3%	34.3%	24.7%	25.7%
Some College, No Degree	26.3%	24.6%	21.8% <sup>6</sup>	20.7%
Associate's Degree	11.1%	9.0%	7.6%	9.1%
Bachelor's Degree	13.1%	13.9%	20.4%	21.2%
Postgraduate Degree	2.8%	5.4%	10.3%	12.3%
<b>SOCIAL</b>				
Annual Average Salary	\$53,597	\$55,088	\$61,816	\$64,141
Cost of Living Index	95.5	91.5	94.7	100.0
U.S. Purchasing Power	\$56,143	\$60,225	\$65,272	\$64,141
Poverty Level (of all people)	13.3%	16.3%	14.7%	13.4%
Children in Single Parent Families (% of all children)	30.0%	37.9%	34.4%	34.1%
Disconnected Youth	4.6%	3.0%	2.8%	2.5%
With a Disability, Age 18-64	13.9%	13.0%	9.5%	10.3%
<b>UNION MEMBERSHIP</b>				
Union Membership (Private)	2.6%	3.8%	2.3%	6.2%
Union Membership (Mfg)	2.8%	4.1%	3.5%	8.4%

\* Population Annual Growth –estimates are total net total projections, including: 1) immigration or emigration and 2) deaths or births in the region

\*\* Aggregated for all counties within a 45-minute drive-time.

Figure 1 presents several data points worth noting in positioning the county and the region for competitive economic development projects.

- Both the 16-and-over and prime-age labor force participation rates are lower than those of the state and the nation. Showcasing employer and educational testimonials can help mitigate negativity surrounding labor force participation.
- Both overall private sector union rates and Manufacturing union rates are significantly lower than the national average. With the potential for Manufacturing and Transportation and Warehousing expansions because of the pandemic, those numbers will be attractive to prospects.
- Orange County has 249.9 people per square mile, more than double that of the state and the nation, reflecting a highly concentrated labor pool.
- The mean commute time of 24.2 minutes demonstrates a willingness to travel and indicates opportunities for regional projects. To demonstrate commute times more accurately for higher-paying jobs, rely on industry partners to provide employees' zip code information for specific occupations; this will likely highlight a longer average distance traveled in the region.
- The rate of high school graduates in the county is higher than that of the state and the nation.
- The four-quarter moving-average unemployment rate in the county is lower than that of the state and the nation.

## Industry Sector Overview

Since site selectors and location advisors will likely review high-level data prior to a visit, it is vital for OCEDC to share the benefits of the current workforce along with accolades from existing industry.

It is also important to consider a larger geographic draw for those occupations that pay significantly higher than the state or the national average, as those wages often increase the potential of employees moving to the region. Additionally, it is important to consider the average pay for each industry relative to the overall average wage. Currently, average wages for the county, state, and nation are:

**Orange County: \$53,597**

**Texas: \$61,874**

**U.S.: \$62,843**

Top industries such as Retail Trade, Accommodation and Food Services pay lower wages than the county average. This provides an opportunity to offer upskilling to employees to move to other industries such as Manufacturing or Construction.

**FIGURE 2: TOP INDUSTRIES BY EMPLOYMENT – ORANGE COUNTY**

NAICS	Industry	Current			Five-Year History		Five-Year Forecast				
		Employment	Average Wages	LQ	Total Employment Change	Annual % Change	Total Demand	Exits	Transfers	Total Employment Change	Annual % Growth
31	Manufacturing	4,380	\$103,699	2.21	-439	-1.9%	2,111	828	1,418	-135	-0.6%
44	Retail Trade	3,373	\$33,127	1.34	75	0.5%	2,090	977	1,234	-121	-0.7%
61	Educational Services	2,724	\$40,086	1.41	-147	-1.0%	1,236	603	651	-18	-0.1%
72	Accommodation and Food Services	2,447	\$19,110	1.34	86	0.7%	2,031	881	1,110	39	0.3%
23	Construction	2,424	\$59,624	1.70	-537	-3.9%	1,179	425	760	-7	-0.1%
62	Health Care and Social Assistance	1,621	\$38,587	0.45	-71	-0.9%	861	384	397	81	1.0%
81	Other Services (Except Public Administration)	1,264	\$28,296	1.21	-128	-1.9%	725	328	392	4	0.1%
54	Professional, Scientific, and Technical Services	995	\$66,893	0.58	247	5.9%	435	158	268	9	0.2%
92	Public Administration	812	\$58,343	0.68	9	0.2%	372	157	214	0	0.0%
48	<b>Transportation and Warehousing</b>	<b>794</b>	<b>\$64,233</b>	<b>0.67</b>	<b>117</b>	<b>3.2%</b>	<b>387</b>	<b>176</b>	<b>239</b>	<b>-28</b>	<b>-0.7%</b>
56	Administrative and Support and Waste Management and Remediation Services	771	\$34,580	0.50	-101	-2.4%	451	188	257	6	0.1%
42	Wholesale Trade	656	\$63,086	0.72	-124	-3.4%	316	127	211	-22	-0.7%
52	Finance and Insurance	560	\$54,169	0.55	-26	-0.9%	247	98	160	-11	-0.4%
11	Agriculture, Forestry, Fishing, and Hunting	317	\$6,069	0.93	-31	-1.8%	143	70	95	-22	-1.5%

NAICS	Industry	Current			Five-Year History		Five-Year Forecast				
		Employment	Average Wages	LQ	Total Employment Change	Annual % Change	Total Demand	Exits	Transfers	Total Employment Change	Annual % Growth
22	Utilities	277	\$87,338	2.16	51	4.2%	107	44	78	-14	-1.1%
53	Real Estate and Rental and Leasing	255	\$47,759	0.61	-17	-1.3%	119	58	69	-8	-0.6%
71	Arts, Entertainment, and Recreation	218	\$26,325	0.57	-68	-5.3%	167	70	87	10	0.9%
51	Information	81	\$38,154	0.17	-90	-13.9%	37	14	25	-2	-0.4%
55	Management of Companies and Enterprises	67	\$78,896	0.18	-13	-3.4%	31	11	19	1	0.2%
21	Mining, Quarrying, and Oil and Gas Extraction	54	\$74,186	0.65	-26	-7.6%	28	9	19	0	0.2%
99	Unclassified	15	\$33,520	0.47	9	22.4%	8	3	5	0	-0.2%
<b>Total - All Industries</b>		<b>24,103</b>	<b>\$53,597</b>	<b>1.00</b>	<b>-1,222</b>	<b>-1.0%</b>	<b>12,827</b>	<b>5,581</b>	<b>7,476</b>	<b>-230</b>	<b>-0.2%</b>

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data is updated through 2021Q1, with preliminary estimates updated to 2021Q2. Forecasted employment growth uses national projections adapted to regional growth patterns.

**The largest sector in Orange County, Texas,** is Manufacturing, which employs 4,380 workers. The next-largest sectors in the region are Retail Trade (3,373) and Educational Services (2,724).

High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The **sectors with the highest LQs in the county** are Manufacturing (2.21), Utilities (2.16), and Construction (1.70).

**Sectors in Orange County, Texas, with the highest average wages per worker** are Manufacturing (\$103,699), Utilities (\$87,338), and Management of Companies and Enterprises (\$78,896). **Regional sectors with the best job growth** over the last five years are Professional, Scientific, and Technical Services (+247), Transportation and Warehousing (+117), and Accommodation and Food Services (+86).

Over the next five years, employment in Orange County, Texas, is projected to contract by 230 jobs. The **fastest growing sector in the region** is expected to be Health Care and Social Assistance, with a 1 percent annual growth rate. The **strongest growth forecasts by number of jobs** over this period are for Health Care and Social Assistance (+81), Accommodation and Food Services (+39), and Arts, Entertainment, and Recreation (+10).

**FIGURE 3: TOP INDUSTRIES BY EMPLOYMENT – 45-Minute Drive Time**

NAICS	Industry	Empl	Current		5-Year History		5-Year Forecast				
			Avg Ann Wages	LQ	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
62	Health Care and Social Assistance	38,355	\$46,608	0.87	-3,314	-1.6%	20,446	9,081	9,388	1,977	1.0%
23	Construction	36,332	\$72,733	2.07	-4,085	-2.1%	18,439	6,423	11,492	524	0.3%
31	Manufacturing	34,884	\$106,272	1.43	-3,339	-1.8%	16,906	6,602	11,304	-999	-0.6%
44	Retail Trade	34,386	\$33,668	1.11	-1,908	-1.1%	21,231	9,952	12,574	-1,295	-0.8%
72	Accommodation and Food Services	27,955	\$20,789	1.24	-3,498	-2.3%	23,344	10,085	12,702	557	0.4%
61	Educational Services	24,445	\$43,713	1.03	164	0.1%	11,351	5,434	5,864	53	0.0%
56	Administrative and Support and Waste Management and Remediation Services	14,820	\$37,845	0.79	127	0.2%	8,669	3,622	4,941	106	0.1%
92	Public Administration	13,459	\$59,504	0.92	132	0.2%	6,036	2,600	3,538	-103	-0.2%
81	Other Services (except Public Administration)	13,401	\$29,315	1.04	-1,675	-2.3%	7,684	3,482	4,157	45	0.1%
<b>48</b>	<b>Transportation and Warehousing</b>	<b>13,239</b>	<b>\$61,209</b>	<b>0.90</b>	<b>1,092</b>	<b>1.7%</b>	<b>7,205</b>	<b>3,006</b>	<b>4,068</b>	<b>132</b>	<b>0.2%</b>
54	Professional, Scientific, and Technical Services	12,298	\$72,027	0.58	-450	-0.7%	5,232	1,947	3,296	-11	0.0%
42	Wholesale Trade	8,514	\$68,474	0.76	-696	-1.6%	4,102	1,653	2,740	-291	-0.7%
52	Finance and Insurance	6,487	\$64,098	0.52	-95	-0.3%	2,851	1,132	1,858	-138	-0.4%
53	Real Estate and Rental and Leasing	4,252	\$50,727	0.82	-588	-2.6%	1,978	962	1,152	-135	-0.6%
11	Agriculture, Forestry, Fishing and Hunting	3,892	\$19,170	0.93	-406	-2.0%	1,884	877	1,183	-176	-0.9%
71	Arts, Entertainment, and Recreation	2,841	\$25,759	0.60	-858	-5.1%	2,095	903	1,116	76	0.5%
22	Utilities	2,137	\$88,923	1.35	-551	-4.5%	842	341	600	-99	-0.9%
51	Information	1,759	\$54,930	0.30	-1,029	-8.8%	714	296	526	-108	-1.3%
55	Management of Companies and Enterprises	1,487	\$82,031	0.33	-915	-9.1%	692	249	425	19	0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	1,210	\$71,209	1.18	-1,014	-11.5%	750	209	433	108	1.7%
99	Unclassified	80	\$31,176	0.21	36	12.6%	44	19	26	-1	-0.1%
<b>Total - All Industries</b>		<b>296,232</b>	<b>\$55,088</b>	<b>1.00</b>	<b>-22,872</b>	<b>-1.5%</b>	<b>161,662</b>	<b>68,939</b>	<b>92,358</b>	<b>365</b>	<b>0.0%</b>

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data is updated through 2021Q1, with preliminary estimates updated to 2021Q2. Forecasted employment growth uses national projections adapted to regional growth patterns.

The **largest sector in the Orange County forty-five-minute drive time** is Health Care and Social Assistance, which employs 38,355 workers. The next-largest sectors in the region are Construction (36,332) and Manufacturing (34,884). The **sectors with the highest LQs in the region** are Construction (2.07), Manufacturing (1.43), and Utilities (1.35).

Sectors in the Orange County forty-five-minute drive time with **the highest average wages per worker** are Manufacturing (\$106,272), Utilities (\$88,923), and Management of Companies and Enterprises (\$82,031).

Regional sectors with the **best job growth over the last five years** are Transportation and Warehousing (+1,092), Educational Services (+164), and Public Administration (+132).

Over the next five years, employment in the Orange County forty-five-minute drive time is projected to expand by 365 jobs. The **fastest-growing sector in the region** is expected to be Mining, Quarrying, and Oil and Gas Extraction, with a 1.7 percent annual growth rate. The **strongest growth forecasts by number of jobs** over this period are for Health Care and Social Assistance (+1,977), Accommodation and Food Services (+557), and Construction (+524).



## Occupation/Industry Snapshot

Showcasing a county or regional industry mix is often an initial step in helping a potential investor understand the overall business and industry clusters. Often, when economic development organizations (EDOs) showcase only their industry/occupation mix, the focus remains solely on the occupation employment in that specific industry. A best practice when trying to expand and attract additional industry to the area is to highlight a wider range of occupations related to a target industry.

For example, industries within the Transportation and Warehousing sector show varying patterns of employment because they face different economic environments and require different mixes of job skills and occupations. As shown in Figure 4, there are 20,095 occupations associated with the Transportation, Distribution and Logistics CTE Cluster within a forty-five-minute drive time of Orange County, Texas, as compared to the 13,239 that work directly in the Transportation and Warehousing sector.

**Reviewing the Transportation, Distribution and Logistics CTE Cluster (Figure 4) within a 45-minute drive-time of Orange County, TX, the data showcases more than 20,000 occupations associated with the industry cluster, as compared to the 13,239 (Figure 3) that work directly in the industry sector.**

» The National Career Clusters® Framework provides a vital structure for sorting out and conveying Career & Technical Education (CTE) programs through learning and comprehensive programs of study.

The National Career Clusters® Framework fills in as a sorting out device for CTE programs, educational program plan and guidance. There are 16 Career Clusters in the National Career Clusters® Framework, speaking to 79 Career Pathways to assist students with exploring their approach to more noteworthy achievement in school and profession. The structure additionally works as a helpful guide in creating projects of study spanning auxiliary and postsecondary frameworks and for making singular understudy plans of study for a total scope of profession choices. It assists students with finding their interests and engages them to pick a pathway that can lead to achievement in school and in a career.

*The Transportation, Distribution and Logistics Cluster is focused on planning, management, and movement of people, materials, and goods by road, pipeline, air, rail and water and related professional support services such as transportation infrastructure planning and management, logistics services, mobile equipment and facility maintenance.*

Prior to the pandemic, numerous headlines indicated that there were limited qualified candidates for supply chain job openings. According to the [Association for Supply Chain Management](#) (ASCM), the pandemic exacerbated the situation, causing a significant talent gap. The ASCM is working with community colleges to find new ways to offer customized training and job-specific skills to enhance the labor market.

The data in Figure 4 also indicates a decline of 1,280 occupations associated with the Transportation, Distribution, and Logistics CTE Cluster over the past five years, alongside 1,157

current online job postings. Taken together, this data indicates that there are nearly enough jobs to offset the decline in occupations.

Workforce availability is an enduring problem across the nation and in nearly every CTE Cluster. The Department of Labor [reported](#) in August 2021 that there are nearly 8.7 million potential workers looking for a job; at the same time, there are nearly ten million job openings in the market. Enhanced benefits, childcare requirements, elderly care issues, and overall fear associated with the pandemic are among the reasons preventing people from seeking employment. Employers are exploring additional incentives to fill these positions.

[Manufacturing Skill Standards Council](#) (MSSC)®, a 501(c)3 non-profit, is an industry-led, training, assessment and certification system focusing on the core skills and knowledge needed by the nation’s front-line production and material handling technicians. MSSC offers remote testing and training options in [supply chain logistics certification](#). As OCEDC continues to expand its business, retention and expansion program, this should be a key topic to not only existing companies, but also to education partners within the region – ultimately aligning them together with the workforce.

**FIGURE 4: TRANSPORTATION, DISTRIBUTION AND LOGISTICS (CTE CLUSTER) OCCUPATION SNAPSHOT – 45-Minute Drive Time**

SOC	Occupation	Current						5-Year History		5-Year Forecast
		Empl	Mean Ann Wages <sup>2</sup>	LQ	Unempl	Unempl Rate	Online Job Ads <sup>3</sup>	Empl Change	Ann %	Ann % Growth
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	3,872	\$32,200	0.76	543	12.8%	73	17	0.1%	-0.3%
53-3032	Heavy and Tractor-Trailer Truck Drivers	3,422	\$43,900	1.00	321	8.7%	527	-197	-1.1%	-0.4%
53-3033	Light Truck Drivers	1,658	\$34,500	0.89	144	8.2%	144	68	0.8%	0.1%
49-3023	Automotive Service Technicians and Mechanics	1,268	\$45,300	1.00	107	8.1%	84	-113	-1.7%	-0.8%
53-7051	Industrial Truck and Tractor Operators	1,144	\$37,200	0.96	150	12.0%	24	-153	-2.5%	-0.6%
53-1047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	910	\$57,500	1.07	51	5.2%	12	4	0.1%	-0.3%
53-7061	Cleaners of Vehicles and Equipment	789	\$25,200	1.22	107	14.0%	23	-38	-0.9%	-0.2%
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	734	\$27,200	0.57	285	26.9%	60	-143	-3.5%	0.0%
49-3042	Mobile Heavy Equipment Mechanics, Except Engines	536	\$55,400	2.09	33	5.8%	1	-33	-1.2%	-0.3%
53-7064	Packers and Packagers, Hand	481	\$23,400	0.44	83	16.4%	n/a	-136	-4.9%	-1.4%

SOC	Occupation	Empl	Current					5-Year History		5-Year Forecast
			Mean Ann Wages <sup>2</sup>	LQ	Unempl	Unempl Rate	Online Job Ads <sup>3</sup>	Empl Change	Ann %	Ann % Growth
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	438	\$51,100	0.95	26	5.1%	53	-56	-2.4%	-0.3%
43-5032	Dispatchers, Except Police, Fire, and Ambulance	328	\$40,900	0.98	20	5.3%	10	-50	-2.8%	-0.6%
49-3021	Automotive Body and Related Repairers	289	\$51,500	1.13	25	8.5%	5	-13	-0.9%	-0.2%
49-3043	Rail Car Repairers	284	\$56,500	7.98	17	5.9%	4	20	1.5%	-1.7%
53-6031	Automotive and Watercraft Service Attendants	268	\$27,400	1.30	38	11.7%	5	10	0.8%	-0.3%
53-5011	Sailors and Marine Oilers	263	\$44,500	5.68	21	7.3%	4	22	1.8%	-0.5%
13-1081	Logisticians	256	\$96,500	0.80	11	4.2%	3	26	2.1%	-0.4%
49-3093	Tire Repairers and Changers	235	\$26,700	1.35	23	9.4%	6	-23	-1.8%	-0.4%
11-3071	Transportation, Storage, and Distribution Managers	226	\$91,200	0.94	19	7.2%	24	6	0.5%	-0.4%
53-5021	Captains, Mates, and Pilots of Water Vessels	213	\$81,600	4.02	26	11.8%	6	18	1.7%	-0.6%
43-5021	Couriers and Messengers	197	\$23,700	0.95	20	8.8%	5	15	1.5%	-0.8%
53-7121	Tank Car, Truck, and Ship Loaders	172	\$42,700	7.28	10	6.4%	n/a	11	1.4%	-1.2%
53-6021	Parking Attendants	161	\$22,000	0.77	54	25.4%	12	-46	-4.9%	0.3%
53-4031	Railroad Conductors and Yardmasters	158	\$62,900	2.47	12	6.7%	1	-19	-2.2%	-1.0%
53-3052	Bus Drivers, Transit and Intercity	156	\$39,600	0.43	27	13.4%	n/a	-121	-10.9%	0.2%
49-3011	Aircraft Mechanics and Service Technicians	142	\$66,600	0.65	10	6.3%	14	-44	-5.3%	0.3%
53-7072	Pump Operators, Except Wellhead Pumps	105	\$55,400	5.54	19	14.1%	n/a	-22	-3.7%	-0.1%
53-4011	Locomotive Engineers	103	\$68,200	2.03	2	2.0%	1	-33	-5.4%	-0.9%
53-2012	Commercial Pilots	95	\$95,500	1.36	8	9.3%	1	-26	-4.8%	0.4%
53-3099	Motor Vehicle Operators, All Other	91	\$32,900	0.95	27	21.0%	1	-15	-3.0%	-0.4%
43-5011	Cargo and Freight Agents	81	\$44,200	0.48	18	16.5%	6	13	3.4%	0.1%
47-4061	Rail-Track Laying and Maintenance Equipment Operators	78	\$59,500	3.07	3	4.2%	1	-5	-1.3%	0.8%
53-4022	Railroad Brake, Signal, and Switch Operators and Locomotive Firers	75	\$50,600	4.15	4	4.5%	6	-25	-5.7%	-1.5%
53-6098	Aircraft Service Attendants and Transportation Workers, All Other	68	\$42,300	1.17	12	11.9%	n/a	-24	-5.8%	-0.1%
53-7199	Material Moving Workers, All Other	67	\$39,900	1.37	4	5.7%	n/a	-22	-5.5%	-0.6%
53-6061	Passenger Attendants	66	\$24,600	1.60	45	34.5%	3	-9	-2.4%	-0.8%

SOC	Occupation	Current						5-Year History		5-Year Forecast
		Empl	Mean Ann Wages <sup>2</sup>	LQ	Unempl	Unempl Rate	Online Job Ads <sup>3</sup>	Empl Change	Ann %	Ann % Growth
53-4013	Rail Yard Engineers, Dinkey Operators, and Hostlers	59	\$52,700	7.72	1	2.2%	5	0	-0.1%	-1.7%
49-3022	Automotive Glass Installers and Repairers	57	\$39,400	1.38	6	10.3%	7	4	1.4%	-0.4%
49-3051	Motorboat Mechanics and Service Technicians	47	\$51,400	1.10	9	16.8%	n/a	-7	-2.7%	-0.6%
53-6011	Bridge and Lock Tenders	43	\$40,700	7.35	5	10.7%	1	13	7.4%	0.2%
49-2091	Avionics Technicians	42	\$73,000	1.12	8	17.1%	2	-11	-4.6%	0.2%
49-3092	Recreational Vehicle Service Technicians	32	\$47,300	1.13	3	9.2%	2	-3	-1.5%	0.0%
53-3011	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	32	\$26,400	1.30	5	13.1%	3	-10	-5.2%	0.2%
53-4099	Rail Transportation Workers, All Other	32	\$49,600	9.32	1	4.0%	2	-31	-12.7%	-1.7%
53-5031	Ship Engineers	32	\$84,300	2.40	5	11.5%	n/a	-1	-0.6%	-0.3%
49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	30	\$72,700	1.76	2	6.6%	3	-15	-8.0%	-0.5%
49-9097	Signal and Track Switch Repairers	30	\$77,300	2.38	3	10.5%	n/a	-2	-1.6%	-1.1%
49-3052	Motorcycle Mechanics	27	\$43,300	0.98	5	16.2%	n/a	-7	-4.6%	-0.1%
53-2011	Airline Pilots, Copilots, and Flight Engineers	23	\$177,400	0.17	2	8.9%	n/a	-14	-9.0%	0.1%
53-2021	Air Traffic Controllers	23	\$123,600	0.65	1	6.3%	2	0	-0.3%	-0.6%
53-7073	Wellhead Pumpers	20	\$59,800	1.02	8	13.5%	2	-18	-11.7%	0.4%
53-2031	Flight Attendants	19	\$55,500	0.10	8	19.8%	1	-22	-14.6%	0.7%
49-3091	Bicycle Repairers	18	\$30,900	0.80	2	9.0%	n/a	1	1.0%	0.0%
53-4041	Subway and Streetcar Operators	17	\$52,400	0.82	1	3.5%	n/a	-2	-1.9%	-0.2%
53-7071	Gas Compressor and Gas Pumping Station Operators	17	\$54,500	2.51	3	12.5%	4	-6	-6.3%	-0.7%
53-5022	Motorboat Operators	16	\$54,100	3.61	2	12.0%	n/a	0	0.5%	-0.8%
49-2096	Electronic Equipment Installers and Repairers, Motor Vehicles	15	\$41,300	0.86	2	9.9%	1	-12	-11.5%	-3.8%
53-1041	Aircraft Cargo Handling Supervisors	11	\$57,700	0.66	1	4.6%	n/a	2	4.6%	0.2%
53-2022	Airfield Operations Specialists	10	\$53,800	0.64	1	5.4%	1	-2	-4.0%	0.3%
53-6041	Traffic Technicians	10	\$43,300	0.76	2	12.5%	2	0	0.4%	0.0%
<b>95-0050</b>	<b>Transportation, Distribution &amp; Logistics (CTE Cluster)</b>	<b>20,095</b>	<b>\$42,000</b>	<b>0.93</b>	<b>2,410</b>	<b>10.9%</b>	<b>1,157</b>	<b>-1,280</b>	<b>-1.2%</b>	<b>-0.4%</b>

Data as of 2021Q2 unless noted otherwise. Note: Figures may not sum due to rounding.

1. Data based on a four-quarter moving average unless noted otherwise.

2. Wage data are as of 2020 and represent the average for all Covered Employment

3. Data represent found online ads active within the last thirty days in the selected region; data represents a sampling rather than the complete universe of postings. Ads lacking zip code information but designating a place (city, town, etc.) may be assigned to the zip code with greatest employment in that place for queries in this analytic.

Reviewing the decline (-1,280) in occupations associated with the transportation, distribution and logistics cluster over the past five years, the region currently has 1,157 job postings online. Theoretically, one might say there are nearly enough jobs to fill with the decline in occupations. However, this is an increasing problem across the nation in nearly every cluster. The Department of Labor [reported](#) in August (2021) there are nearly 8.7 million potential workers looking for a job (unemployment rate) – and at the same time there are nearly 10 million job vacancies in the market. Enhanced benefits, child and elderly care issues and overall fear associated with the pandemic are among the reasons preventing people from seeking employment. Employers across the national are exploring additional incentives to fill these positions.

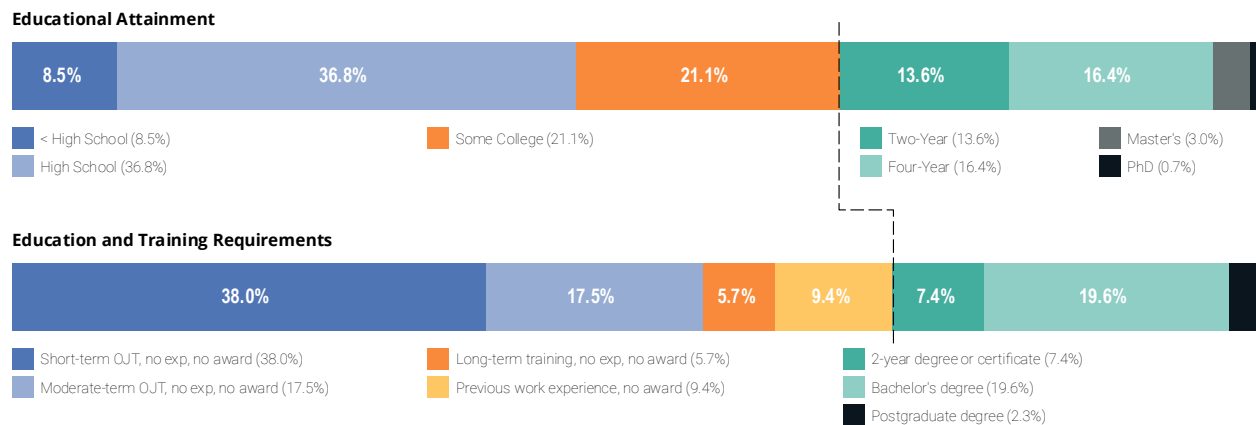
## Workforce & Industry Alignment

The labor force participation rate measures the percentage of residents who are in the labor force. The unemployment rate measures the percentage within the labor force that is currently without a job. A high participation rate combined with a low unemployment rate is an indication of a robust job market.

Demand for trained and skilled workers is high and expected to increase as industries adopt new technologies. Jobs are increasingly requiring education or credentials beyond high school. Comparing the educational attainment of the workforce with what companies are requiring provides valuable insight into the quality and trainability of the workforce.

Figure 5 shows that 29.3 percent of the jobs in Orange County require a two-year certificate/degree or higher, and 33.7 percent of the population has a two-year certificate/degree or higher. For employers seeking employees with some college or higher, 54.8 percent of residents meet that criterion, as compared to employers only requiring 44.4 percent of similar education and training.

**FIGURE 5: EDUCATION LEVEL VERSUS COMPARED TO TRAINING REQUIREMENTS**



Source: JobsEQ®. Data as of 2021Q2.

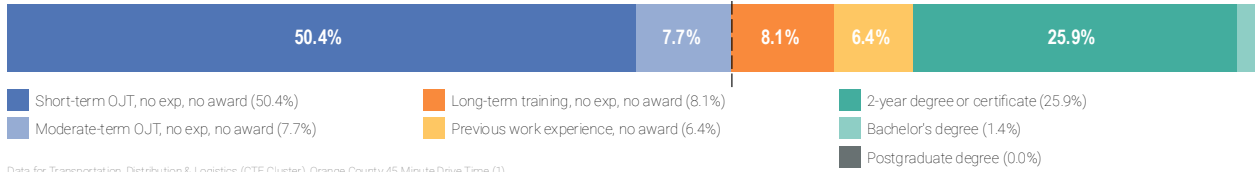
As seen in Figure 6, of Transportation, Distribution, and Logistics jobs in the Orange County region, 41.8 percent require some form of long-term training, compared to 34.9 percent of the workforce possessing some college or higher. This poses a potential threat for the organization when trying to expand and attract additional Logistics industries because it represents a gap in skilled workers to meet current and future workforce demands.

**FIGURE 6: EDUCATION LEVEL VERSUS TRAINING REQUIREMENTS IN THE TRANSPORTATION, DISTRIBUTION AND LOGISTICS CTE CLUSTER – 45 Minute Drive Time**

**Educational Attainment**



**Education and Training Requirements**



Data for Transportation, Distribution & Logistics (CTE Cluster), Orange County 45 Minute Drive Time (1)  
 Source: JobsEQ®. Data as of 2021Q2.

Source: JobsEQ®. Data as of 2021Q2.

## Building the Talent Pipeline

Educational attainment and training play a critical role in evaluating a community or region. EDOs must demonstrate not only an existing workforce but also a talent pipeline that can sustain industry. In running industry models, companies are looking for fifty applicants for every one position hired. In a rural area, providing data on career ladders, case studies, and willing educational partners is critical to ensuring the region is considered for projects.

The talent pipeline in Orange County is strong, with nine higher-education institutions within a forty-five-minute drive time issuing nearly 11,000 awards, certificates, and degrees annually. **OCEDC should also highlight the nearly 800 Transportation, Distribution, and Logistics awards being issued annually by higher-education institutions within the region**, as indicated in Figure 8.

Orange County has over 1,200 students graduating annually. As students prepare for continuing education or career opportunities, it is important the educators and companies highlight potential warehouse floor labor opportunities – for both new and existing facility locations. This engagement provides a potential continual flow of workers over time. Tim Feemster, a former [Supply Chain and Logistics Technology Industry Advisory Board](#) member, encourages opportunities to link members of the student body in the University of Houston program to employers in Orange County who are seeking interns during the summers and have the employers participate in job fairs on campus during the school year. It would be an opportunity to have the [WorkForce Solutions Southeast Texas](#) spearhead this activity.

**FIGURE 7: 2020 CERTIFICATES & AWARDS ISSUED WITHIN A 45-MINUTE DRIVE TIME**

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
13.0401	Educational Leadership and Administration, General.	0	0	0	0	0	937	1,228	0	46	2,211
24.0102	General Studies.	0	304	242	0	270	0	0	0	0	816
51.3801	Registered Nursing/Registered Nurse.	0	0	125	0	304	0	47	0	0	476
15.0699	Industrial Production Technologies/Technicians, Other.	131	121	123	0	0	0	0	0	0	375
13.1001	Special Education and Teaching, General.	0	0	0	0	0	217	124	0	0	341
15.0404	Instrumentation Technology/Technician.	82	99	158	0	0	0	0	0	0	339
52.0201	Business Administration and Management, General.	0	15	41	0	151	0	117	0	0	324
41.0301	Chemical Technology/Technician.	25	62	227	0	0	0	0	0	0	314



CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
43.0104	Criminal Justice/Safety Studies.	25	18	32	0	125	0	112	0	0	312
51.3901	Licensed Practical/Vocational Nurse Training.	0	166	0	36	0	0	0	0	0	202
52.0101	Business/Commerce, General.	59	38	56	0	44	0	0	0	0	197
48.0508	Welding Technology/Welder.	106	61	4	19	0	0	0	0	0	190
30.9999	Multi-/Interdisciplinary Studies, Other.	0	0	0	0	188	0	0	0	0	188
46.0302	Electrician.	64	67	55	0	0	0	0	0	0	186
52.0401	Administrative Assistant and Secretarial Science, General.	156	15	12	0	0	0	0	0	0	183
13.0501	Educational/Instructional Technology.	0	0	0	0	0	0	182	0	0	182
14.0101	Engineering, General.	0	0	0	0	94	0	78	0	7	179
42.2803	Counseling Psychology.	0	0	0	0	0	0	171	0	0	171
12.0401	Cosmetology/Cosmetologist, General.	12	148	3	0	0	0	0	0	0	163
51.1508	Mental Health Counseling/Counselor.	0	0	0	0	0	0	122	0	0	122
42.0101	Psychology, General.	0	0	0	0	88	0	28	1	0	117
31.0505	Exercise Science and Kinesiology.	0	0	0	0	75	0	30	0	0	105
24.0101	Liberal Arts and Sciences/Liberal Studies.	0	0	96	0	3	0	0	0	0	99
26.0101	Biology/Biological Sciences, General.	0	0	6	0	79	0	2	0	0	87
52.0301	Accounting.	0	0	0	0	64	0	22	0	0	86
52.0302	Accounting Technology/Technician and Bookkeeping.	40	17	28	0	0	0	0	0	0	85
14.1901	Mechanical Engineering.	0	0	0	0	80	0	0	0	0	80
11.0103	Information Technology.	39	16	20	0	0	0	0	0	0	75
11.0701	Computer Science.	0	0	0	0	37	0	37	0	0	74
51.0801	Medical/Clinical Assistant.	32	35	0	0	0	0	0	0	0	67
45.1101	Sociology, General.	0	0	4	0	61	0	0	0	0	65
09.0101	Speech Communication and Rhetoric.	0	0	0	0	64	0	0	0	0	64
12.0503	Culinary Arts/Chef Training.	35	21	7	0	0	0	0	0	0	63
01.0000	Agriculture, General.	0	0	0	0	60	0	0	0	0	60
15.1301	Drafting and Design Technology/Technician, General.	3	21	34	0	0	0	0	0	0	58
14.0701	Chemical Engineering.	0	0	0	0	47	0	0	0	10	57
11.0101	Computer and Information Sciences, General.	0	10	9	0	35	0	0	0	0	54

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
15.1202	Computer/Computer Systems Technology/Technician.	33	0	20	0	0	0	0	0	0	53
43.0107	Criminal Justice/Police Science.	40	0	13	0	0	0	0	0	0	53
50.0402	Commercial and Advertising Art.	18	24	9	0	0	0	0	0	0	51
52.0801	Finance, General.	0	0	0	0	51	0	0	0	0	51
52.1401	Marketing/Marketing Management, General.	0	0	0	0	50	0	0	0	0	50
15.0612	Industrial Technology/Technician.	0	0	0	0	49	0	0	0	0	49
44.0701	Social Work.	0	0	0	0	47	0	0	0	0	47
51.0911	Radiologic Technology/Science - Radiographer.	0	0	23	0	22	0	0	0	0	45
23.0101	English Language and Literature, General.	0	0	0	0	29	0	14	0	0	43
51.0713	Medical Insurance Coding Specialist/Coder.	5	28	9	0	0	0	0	0	0	42
50.0901	Music, General.	0	0	4	0	34	0	4	0	0	42
14.1001	Electrical and Electronics Engineering.	0	0	0	0	37	0	0	0	0	37
46.0301	Electrical and Power Transmission Installation/Installer, General.	23	14	0	0	0	0	0	0	0	37
27.0101	Mathematics, General.	0	0	0	0	26	0	11	0	0	37
31.0504	Sport and Fitness Administration/Management.	0	0	0	0	37	0	0	0	0	37
51.0203	Speech-Language Pathology/Pathologist.	0	0	0	0	0	0	35	0	0	35
51.0201	Communication Sciences and Disorders, General.	0	0	0	0	33	0	0	0	0	33
14.3501	Industrial Engineering.	0	0	0	0	33	0	0	0	0	33
09.0102	Mass Communication/Media Studies.	0	0	0	0	31	0	0	0	0	31
51.0602	Dental Hygiene/Hygienist.	0	0	28	0	0	0	0	0	0	28
13.1206	Teacher Education, Multiple Levels.	0	0	27	0	0	0	0	0	0	27
47.0608	Aircraft Powerplant Technology/Technician.	0	23	3	0	0	0	0	0	0	26
51.0001	Health and Wellness, General.	0	0	0	0	26	0	0	0	0	26
13.1202	Elementary Education and Teaching.	0	0	0	0	17	2	6	0	0	25
51.0707	Health Information/Medical Records Technology/Technician.	13	0	12	0	0	0	0	0	0	25
52.1201	Management Information Systems, General.	0	0	0	0	25	0	0	0	0	25

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
12.0409	Aesthetics/Esthetician and Skin Care Specialist.	24	0	0	0	0	0	0	0	0	24
47.0600	Vehicle Maintenance and Repair Technology/Technician, General.	17	7	0	0	0	0	0	0	0	24
13.1210	Early Childhood Education and Teaching.	0	0	0	0	23	0	0	0	0	23
19.0505	Foodservice Systems Administration/Management.	0	0	0	0	23	0	0	0	0	23
51.0909	Surgical Technology/Technologist.	0	1	22	0	0	0	0	0	0	23
16.1601	American Sign Language (ASL).	0	0	0	0	22	0	0	0	0	22
52.0701	Entrepreneurship/Entrepreneurial Studies.	0	0	0	0	22	0	0	0	0	22
46.0503	Plumbing Technology/Plumber.	22	0	0	0	0	0	0	0	0	22
50.0701	Art/Art Studies, General.	0	0	0	0	21	0	0	0	0	21
16.0101	Foreign Languages and Literatures, General.	0	0	0	0	7	0	14	0	0	21
50.0409	Graphic Design.	0	0	0	0	21	0	0	0	0	21
51.2211	Health Services Administration.	0	0	0	0	21	0	0	0	0	21
51.2207	Public Health Education and Promotion.	0	0	0	0	0	0	21	0	0	21
51.0601	Dental Assisting/Assistant.	0	20	0	0	0	0	0	0	0	20
54.0101	History, General.	0	0	0	0	18	0	2	0	0	20
46.0303	Lineworker.	0	19	0	0	0	0	0	0	0	19
40.0501	Chemistry, General.	0	0	0	0	12	0	6	0	0	18
51.0908	Respiratory Care Therapy/Therapist.	0	0	18	0	0	0	0	0	0	18
52.0601	Business/Managerial Economics.	0	0	0	0	17	0	0	0	0	17
15.0303	Electrical, Electronic, and Communications Engineering Technology/Technician.	1	0	16	0	0	0	0	0	0	17
43.0203	Fire Science/Firefighting.	17	0	0	0	0	0	0	0	0	17
51.0805	Pharmacy Technician/Assistant.	6	11	0	0	0	0	0	0	0	17
14.0801	Civil Engineering, General.	0	0	0	0	16	0	0	0	0	16
51.0802	Clinical/Medical Laboratory Assistant.	16	0	0	0	0	0	0	0	0	16
13.1003	Education/Teaching of Individuals with Hearing Impairments Including Deafness.	0	0	0	0	0	0	10	0	6	16
19.0501	Foods, Nutrition, and Wellness Studies, General.	0	0	0	0	0	0	16	0	0	16
50.0903	Music Performance, General.	0	0	0	0	16	0	0	0	0	16
45.1001	Political Science and Government, General.	0	0	0	0	16	0	0	0	0	16

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
51.0910	Diagnostic Medical Sonography/Sonographer and Ultrasound Technician.	0	1	14	0	0	0	0	0	0	15
52.1001	Human Resources Management/Personnel Administration, General.	0	0	0	0	15	0	0	0	0	15
11.0401	Information Science/Studies.	0	0	0	0	0	0	15	0	0	15
51.1005	Clinical Laboratory Science/Medical Technology/Technologist.	0	0	0	0	14	0	0	0	0	14
14.3301	Construction Engineering.	0	0	0	0	13	1	0	0	0	14
51.3802	Nursing Administration.	0	0	0	0	0	0	14	0	0	14
15.0701	Occupational Safety and Health Technology/Technician.	5	0	9	0	0	0	0	0	0	14
51.3203	Nursing Education.	0	0	0	0	0	0	13	0	0	13
15.1302	CAD/CADD Drafting and/or Design Technology/Technician.	12	0	0	0	0	0	0	0	0	12
51.1012	Sterile Processing Technology/Technician.	12	0	0	0	0	0	0	0	0	12
40.0599	Chemistry, Other.	0	0	0	0	0	0	11	0	0	11
13.1334	School Librarian/School Library Media Specialist.	0	0	0	0	0	11	0	0	0	11
12.0413	Cosmetology, Barber/Styling, and Nail Instructor.	9	0	1	0	0	0	0	0	0	10
47.0605	Diesel Mechanics Technology/Technician.	5	1	4	0	0	0	0	0	0	10
50.0501	Drama and Dramatics/Theatre Arts, General.	0	0	2	0	8	0	0	0	0	10
15.1501	Engineering/Industrial Management.	0	0	0	0	0	1	9	0	0	10
47.0201	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician.	8	0	2	0	0	0	0	0	0	10
40.0801	Physics, General.	0	0	0	0	10	0	0	0	0	10
13.1205	Secondary Education and Teaching.	0	0	0	0	0	2	8	0	0	10
51.0202	Audiology/Audiologist.	0	0	0	0	0	0	0	0	9	9
19.0709	Child Care Provider/Assistant.	0	2	7	0	0	0	0	0	0	9
40.0601	Geology/Earth Science, General.	0	0	0	0	9	0	0	0	0	9
15.0501	Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician.	0	6	3	0	0	0	0	0	0	9

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide.	9	0	0	0	0	0	0	0	0	9
13.1314	Physical Education Teaching and Coaching.	0	0	0	0	9	0	0	0	0	9
42.2813	Applied Psychology.	0	0	0	0	0	0	8	0	0	8
51.1001	Blood Bank Technology Specialist.	0	8	0	0	0	0	0	0	0	8
43.0102	Corrections.	0	8	0	0	0	0	0	0	0	8
22.0302	Legal Assistant/Paralegal.	0	0	8	0	0	0	0	0	0	8
12.0410	Nail Technician/Specialist and Manicurist.	8	0	0	0	0	0	0	0	0	8
52.1501	Real Estate.	3	0	5	0	0	0	0	0	0	8
03.0601	Wildlife, Fish and Wildlands Science and Management.	0	0	0	0	8	0	0	0	0	8
23.1302	Creative Writing.	0	0	0	0	0	0	7	0	0	7
51.3810	Psychiatric/Mental Health Nurse/Nursing.	0	0	0	0	0	0	0	7	0	7
11.0801	Web Page, Digital/Multimedia and Information Resources Design.	1	0	6	0	0	0	0	0	0	7
26.0202	Biochemistry.	0	0	0	0	6	0	0	0	0	6
11.0202	Computer Programming, Specific Applications.	0	5	0	0	1	0	0	0	0	6
11.0201	Computer Programming/Programmer, General.	1	0	5	0	0	0	0	0	0	6
11.0501	Computer Systems Analysis/Analyst.	0	0	6	0	0	0	0	0	0	6
14.1401	Environmental/Environmental Health Engineering.	0	0	0	0	0	0	6	0	0	6
50.0702	Fine/Studio Arts, General.	0	0	1	0	5	0	0	0	0	6
51.3501	Massage Therapy/Therapeutic Massage.	0	6	0	0	0	0	0	0	0	6
51.0710	Medical Office Assistant/Specialist.	6	0	0	0	0	0	0	0	0	6
51.1009	Phlebotomy Technician/Phlebotomist.	6	0	0	0	0	0	0	0	0	6
44.0401	Public Administration.	0	0	4	0	0	0	2	0	0	6
51.1501	Substance Abuse/Addiction Counseling.	1	0	5	0	0	0	0	0	0	6
47.0604	Automobile/Automotive Mechanics Technology/Technician.	4	0	1	0	0	0	0	0	0	5

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
13.1101	Counselor Education/School Counseling and Guidance Services.	0	0	0	0	0	0	5	0	0	5
03.0104	Environmental Science.	0	0	0	0	5	0	0	0	0	5
52.0205	Operations Management and Supervision.	0	0	0	0	5	0	0	0	0	5
31.0501	Sports, Kinesiology, and Physical Education/Fitness, General.	0	0	5	0	0	0	0	0	0	5
52.0209	Transportation/Mobility Management.	0	0	0	0	0	0	5	0	0	5
11.1003	Computer and Information Systems Security/Auditing/Information Assurance.	0	4	0	0	0	0	0	0	0	4
19.0701	Human Development and Family Studies, General.	0	0	0	0	4	0	0	0	0	4
51.0716	Medical Administrative/Executive Assistant and Medical Secretary.	1	0	3	0	0	0	0	0	0	4
19.0901	Apparel and Textiles, General.	0	0	0	0	3	0	0	0	0	3
19.0101	Family and Consumer Sciences/Human Sciences, General.	0	0	0	0	0	0	3	0	0	3
03.0511	Forest Technology/Technician.	2	1	0	0	0	0	0	0	0	3
47.0303	Industrial Mechanics and Maintenance Technology/Technician.	0	1	2	0	0	0	0	0	0	3
24.0199	Liberal Arts and Sciences, General Studies and Humanities, Other.	0	0	3	0	0	0	0	0	0	3
23.1304	Rhetoric and Composition.	0	0	3	0	0	0	0	0	0	3
41.0303	Chemical Process Technology.	2	0	0	0	0	0	0	0	0	2
11.0901	Computer Systems Networking and Telecommunications.	2	0	0	0	0	0	0	0	0	2
51.0904	Emergency Medical Technology/Technician (EMT Paramedic).	1	0	1	0	0	0	0	0	0	2
40.0510	Forensic Chemistry.	0	0	0	0	2	0	0	0	0	2
49.0399	Marine Transportation, Other.	2	0	0	0	0	0	0	0	0	2
09.0701	Radio and Television.	0	0	2	0	0	0	0	0	0	2
09.0903	Advertising.	0	0	0	0	1	0	0	0	0	1
13.0301	Curriculum and Instruction.	0	0	0	0	0	0	1	0	0	1
13.1004	Education/Teaching of the Gifted and Talented.	0	0	0	0	0	0	0	1	0	1
13.1203	Junior High/Intermediate/Middle School Education and Teaching.	0	0	0	0	0	1	0	0	0	1

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
<b>Total</b>		<b>1,144</b>	<b>1,424</b>	<b>1,588</b>	<b>55</b>	<b>2,789</b>	<b>1,172</b>	<b>2,546</b>	<b>9</b>	<b>78</b>	<b>10,805</b>

Source: [JobsEQ®](#)

Data as of the 2019-2020 academic year

**FIGURE 8: 2020 CERTIFICATES AND AWARDS ISSUED WITHIN A 45-MINUTE DRIVE TIME - TRANSPORTATION, DISTRIBUTION, & WAREHOUSING (CTE CLUSTER)**

CIP Code	Title	Certificate < 1 Yr	Certificate 1+ but < 2 Yr	Associate's	Certificate 2+ but < 4 Yr	Bachelor's	Post-Baccalaureate	Master's	Post-Master's	Doctorate	Total Awards
52.0201	Business Administration and Management, General.	0	15	41	0	151	0	117	0	0	324
52.0101	Business/Commerce, General.	59	38	56	0	44	0	0	0	0	197
46.0302	Electrician.	64	67	55	0	0	0	0	0	0	186
47.0608	Aircraft Powerplant Technology/Technician.	0	23	3	0	0	0	0	0	0	26
47.0600	Vehicle Maintenance and Repair Technology/Technician, General.	17	7	0	0	0	0	0	0	0	24
47.0605	Diesel Mechanics Technology/Technician.	5	1	4	0	0	0	0	0	0	10
44.0401	Public Administration.	0	0	4	0	0	0	2	0	0	6
47.0604	Automobile/Automotive Mechanics Technology/Technician.	4	0	1	0	0	0	0	0	0	5
52.0205	Operations Management and Supervision.	0	0	0	0	5	0	0	0	0	5
52.0209	Transportation/Mobility Management.	0	0	0	0	0	0	5	0	0	5
49.0399	Marine Transportation, Other.	2	0	0	0	0	0	0	0	0	2
<b>Total</b>		<b>151</b>	<b>151</b>	<b>164</b>	<b>0</b>	<b>200</b>	<b>0</b>	<b>124</b>	<b>0</b>	<b>0</b>	<b>790</b>

## Education Programs to Occupations Crosswalk

The CIP SOC Crosswalk is a joint effort by the Bureau of Labor Statistics and the National Center for Education Statistics (NCES) that matches six-digit CIP Codes from the 2020 Classification of Instructional Programs (CIP) with six-digit detailed descriptions from the 2018 Standard Occupational Classification (SOC). The crosswalk is designed to match postsecondary programs of study that provide graduates with specific skills and knowledge to occupations requiring those skills or knowledge to be successful.

For several reasons, the data must be treated with care, especially when making comparisons to occupation demand. While the data shows the awards in a specified region, some postsecondary institutions with branches report all their data through only one branch. A branch in the greater SARPC region may grant awards without reporting data in a specific sub-region, and awards may be reported for a school in the region that were granted in a branch location elsewhere.

In addition, the program-occupation pairs form a complex web, making it difficult to view a direct relationship between a specific training program and a single occupation. The program-occupation pairs provided by the NCES, while detailed, are incomplete—especially in terms of rare and nontraditional training routes.

Data represents awards, not students. A student with a double major will count as two awards in this data set, and if one student earns several awards at different levels (two-year, four-year, then postgraduate), each award will be reported.

Finally, note that students do not necessarily reside and work in the same region in which they receive an education.

The following data is presented in Figure 9:

- **Annual Separation Demand** – The projected minimum demand due to separations such as retirements and transitions into a different occupation.
- **Total Annual Demand** – Annual average occupation demand due to separation demand plus growth. Growth estimates are based on the current occupation employment and the ten-year occupation demand.



**FIGURE 9: TRANSPORTATION, DISTRIBUTION, AND WAREHOUSING (CTE CLUSTER) CIP TO SOC CROSSWALK (OCCUPATION LINKAGES)**

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
47.0608	Aircraft Powerplant Technology/Technician.	49-3011	Aircraft Mechanics and Service Technicians	13	13	151	\$66,500	14
47.0608	Aircraft Powerplant Technology/Technician.	51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	3	3	42	\$58,200	24
47.0604	Automobile/Automotive Mechanics Technology/Technician.	49-3023	Automotive Service Technicians and Mechanics	133	124	1,413	\$44,800	94
47.0604	Automobile/Automotive Mechanics Technology/Technician.	49-2096	Electronic Equipment Installers and Repairers, Motor Vehicles	2	1	16	\$40,900	1
47.0604	Automobile/Automotive Mechanics Technology/Technician.	49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	3	3	33	\$72,000	3
52.0201	Business Administration and Management, General.	13-1111	Management Analysts	59	61	615	\$112,300	27
52.0201	Business Administration and Management, General.	13-1141	Compensation, Benefits, and Job Analysis Specialists	12	12	122	\$55,900	6
52.0201	Business Administration and Management, General.	13-1198	Project Management Specialists and Business Operations Specialists, All Other	246	252	2,531	\$76,600	68
52.0201	Business Administration and Management, General.	13-2053	Insurance Underwriters	7	6	84	\$68,000	1
52.0201	Business Administration and Management, General.	25-1011	Business Teachers, Postsecondary	4	5	52	\$91,500	4
52.0201	Business Administration and Management, General.	11-3111	Compensation and Benefits Managers	2	2	24	\$100,000	

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
52.0201	Business Administration and Management, General.	11-3131	Training and Development Managers	5	5	51	\$117,800	
52.0201	Business Administration and Management, General.	11-3013	Facilities Managers	41	42	487	\$95,900	
52.0201	Business Administration and Management, General.	11-1011	Chief Executives	18	14	273	\$204,700	4
52.0201	Business Administration and Management, General.	11-1021	General and Operations Managers	403	408	4,619	\$112,900	67
52.0201	Business Administration and Management, General.	11-2022	Sales Managers	48	46	547	\$137,200	54
52.0201	Business Administration and Management, General.	11-3012	Administrative Services Managers	4	4	47	\$95,700	1
52.0201	Business Administration and Management, General.	11-3051	Industrial Production Managers	40	38	566	\$135,900	27
52.0201	Business Administration and Management, General.	11-3071	Transportation, Storage, and Distribution Managers	21	22	271	\$93,100	26
52.0201	Business Administration and Management, General.	11-3121	Human Resources Managers	19	19	220	\$105,300	11
52.0201	Business Administration and Management, General.	11-9021	Construction Managers	148	167	1,966	\$100,200	27
52.0201	Business Administration and Management, General.	11-9151	Social and Community Service Managers	19	22	201	\$68,600	3
52.0201	Business Administration and Management, General.	13-1051	Cost Estimators	59	57	609	\$78,700	9
52.0201	Business Administration and Management, General.	13-1071	Human Resources Specialists	80	81	785	\$60,800	80
52.0201	Business Administration and Management, General.	13-1081	Logisticians	28	27	291	\$95,600	3
52.0201	Business Administration and Management, General.	11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	180	171	2,449	\$102,600	47

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
52.0101	Business/Commerce, General.	13-1051	Cost Estimators	59	57	609	\$78,700	9
52.0101	Business/Commerce, General.	11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	180	171	2,449	\$102,600	47
52.0101	Business/Commerce, General.	13-1111	Management Analysts	59	61	615	\$112,300	27
52.0101	Business/Commerce, General.	11-3071	Transportation, Storage, and Distribution Managers	21	22	271	\$93,100	26
52.0101	Business/Commerce, General.	11-9151	Social and Community Service Managers	19	22	201	\$68,600	3
52.0101	Business/Commerce, General.	11-9021	Construction Managers	148	167	1,966	\$100,200	27
52.0101	Business/Commerce, General.	11-1021	General and Operations Managers	403	408	4,619	\$112,900	67
52.0101	Business/Commerce, General.	11-3051	Industrial Production Managers	40	38	566	\$135,900	27
52.0101	Business/Commerce, General.	11-3012	Administrative Services Managers	4	4	47	\$95,700	1
52.0101	Business/Commerce, General.	11-2022	Sales Managers	48	46	547	\$137,200	54
52.0101	Business/Commerce, General.	11-1011	Chief Executives	18	14	273	\$204,700	4
52.0101	Business/Commerce, General.	11-3013	Facilities Managers	41	42	487	\$95,900	
52.0101	Business/Commerce, General.	25-1011	Business Teachers, Postsecondary	4	5	52	\$91,500	4
52.0101	Business/Commerce, General.	13-2053	Insurance Underwriters	7	6	84	\$68,000	1
52.0101	Business/Commerce, General.	13-1198	Project Management Specialists and Business Operations	246	252	2,531	\$76,600	68

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
			Specialists, All Other					
52.0101	Business/Commerce, General.	13-2022	Appraisers of Personal and Business Property	1	1	8	\$61,100	
47.0605	Diesel Mechanics Technology/Technician.	49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	3	3	33	\$72,000	3
47.0605	Diesel Mechanics Technology/Technician.	49-2096	Electronic Equipment Installers and Repairers, Motor Vehicles	2	1	16	\$40,900	1
47.0605	Diesel Mechanics Technology/Technician.	49-3051	Motorboat Mechanics and Service Technicians	5	5	53	\$50,700	
47.0605	Diesel Mechanics Technology/Technician.	49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	47	47	508	\$50,900	62
46.0302	Electrician.	49-9097	Signal and Track Switch Repairers	3	3	32	\$77,000	1
46.0302	Electrician.	49-2098	Security and Fire Alarm Systems Installers	15	16	125	\$45,400	7
46.0302	Electrician.	47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	329	343	3,105	\$69,400	73
46.0302	Electrician.	47-2111	Electricians	236	244	1,999	\$59,000	32
49.0399	Marine Transportation, Other.	53-5022	Motorboat Operators	2	1	17	\$54,300	
52.0205	Operations Management and Supervision.	11-3013	Facilities Managers	41	42	487	\$95,900	
52.0205	Operations Management and Supervision.	51-1011	First-Line Supervisors of Production and Operating Workers	210	202	2,102	\$92,400	79
52.0205	Operations Management and Supervision.	49-1011	First-Line Supervisors of Mechanics,	119	116	1,316	\$73,600	69

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
			Installers, and Repairers					
52.0205	Operations Management and Supervision.	25-1011	Business Teachers, Postsecondary	4	5	52	\$91,500	4
52.0205	Operations Management and Supervision.	11-3021	Computer and Information Systems Managers	24	25	306	\$131,600	3
52.0205	Operations Management and Supervision.	11-3051	Industrial Production Managers	40	38	566	\$135,900	27
52.0205	Operations Management and Supervision.	11-9021	Construction Managers	148	167	1,966	\$100,200	27
52.0205	Operations Management and Supervision.	13-1081	Logisticians	28	27	291	\$95,600	3
44.0401	Public Administration.	11-9151	Social and Community Service Managers	19	22	201	\$68,600	3
44.0401	Public Administration.	11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	180	171	2,449	\$102,600	47
44.0401	Public Administration.	11-3071	Transportation, Storage, and Distribution Managers	21	22	271	\$93,100	26
44.0401	Public Administration.	11-1011	Chief Executives	18	14	273	\$204,700	4
44.0401	Public Administration.	11-1021	General and Operations Managers	403	408	4,619	\$112,900	67
44.0401	Public Administration.	11-9131	Postmasters and Mail Superintendents	2	1	24	\$77,300	
44.0401	Public Administration.	11-1031	Legislators	6	6	79	\$36,300	
52.0209	Transportation/Mobility Management.	53-1047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	113	114	1,059	\$56,900	15

CIP Code	CIP Title	SOC Code	SOC Title	Annual Separation Demand	Total Annual Demand	Empl	Avg. Wages	Online Job Ads <sup>1</sup>
52.0209	Transportation/Mobility Management.	11-3071	Transportation, Storage, and Distribution Managers	21	22	271	\$93,100	26
47.0600	Vehicle Maintenance and Repair Technology/Technician, General.	49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	119	116	1,316	\$73,600	69
47.0600	Vehicle Maintenance and Repair Technology/Technician, General.	49-3023	Automotive Service Technicians and Mechanics	133	124	1,413	\$44,800	94

Data as of the 2019-2020 academic year, related occupation data as of 2021Q2 except wages which are as of 2020.

Occupation demand data reflect annual average rates from the 10-year forecast.

1. Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings. Ads lacking zip code information but designating a place (city, town, etc.) may be assigned to the zip code with greatest employment in that place for queries in this analytic.

Note: Figures may not sum due to rounding.



## Current Employment Conditions

### *In today's market, can employers find the employees they need?*

*Understanding the existing labor force and the growth/decline of targeted industries is an important first step to better positioning OCEDC's region for future competitive projects to recruit the target industry. It is also important to consider potential workforce deficits when running project scenarios.*

### Labor Availability

Chmura's [JobsEQ®](#) "what-if" modeling describes the labor availability of a region for an incoming industry. Figures 10 and 11 use the model to depict the labor availability within a forty-five-minute drive-time of Orange County for an incoming Transportation and Warehousing industry. Workforce projections for a 100 and 250 job count were considered.

By evaluating labor availability within a forty-five-minute drive time versus single-county availability, employee access increases substantially. Based on high-level data, the region has strong labor availability for both the 100 and 250 job count scenarios.

Drilling down into SOC codes reveals a more precise picture of the region's current labor pool: both an excess of labor availability and minimal potential gaps in a few occupations. While a few occupations might have less than a desired amount of current employment, most of these occupations have a significant extended employment base.

Encouraging and educating potential employees in the extended employment base to consider other trades would further enhance OCEDC's labor pool. This effort should begin at the middle-to-high-school level to provide future employees insight into diverse occupations available in the area and to prepare them for new advancements in the area.

#### » Column Glossary

##### **Labor Market with Occupations Directly Related to Industry Sector »**

- **Employed:** Estimated number of workers currently employed in the occupation in the region by residence.
- **Unemployed:** Estimated number of workers unemployed in the occupation in the region by residence.



## Labor Market with Transferable Skill Sets Directly Related to Industry Sector »

- **Employment Extended:** Regional workers who meet three criteria: are currently employed, have similar skill sets to the specified occupation (though they may need additional training and/or certification to meet the specified occupation's requirements), and who have current wages that are no more than 10 percent higher than average wages of the specified occupation.
- **Unemployment Extended:** Same as Employment Extended, except this indicates workers who are currently unemployed.
- **Potential Candidates per Opening:** The ratio of potential candidates (employed plus unemployed) to the new employer demand. Numbers in **bold red** represent short labor supplies; all other numbers reflect generally ample supply. (The threshold for an "ample" supply varies industry to industry and occupation to occupation, but a threshold of fifty is used in JobsEQ to denote generally ample supply.)

**FIGURE 10: WHAT-IF SCENARIO – 100 NEW TRANSPORTATION AND WAREHOUSING (NAICS 48) OCCUPATIONS**

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
53-3032	Heavy and Tractor-Trailer Truck Drivers	17	3,354	321	\$43,900	\$48,700	2,029	197	216
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	14	3,703	543	\$32,200	\$33,700	107	7	303
53-3033	Light Truck Drivers	7	1,607	144	\$34,500	\$41,100	978	305	250
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	6	774	285	\$27,200	\$34,400	502	130	177
43-5052	Postal Service Mail Carriers	5	590	13	\$51,900	\$53,200	4,976	662	121
53-7051	Industrial Truck and Tractor Operators	4	1,103	150	\$37,200	\$39,200	6,951	861	313
53-7065	Stockers and Order Fillers	4	3,485	438	\$30,100	\$31,000	23,558	5,046	981
53-3052	Bus Drivers, Transit and Intercity	3	177	27	\$39,600	\$48,100	895	336	68
53-1047	First-Line Supervisors of Transportation and Material	3	928	51	\$57,500	\$58,300	7,944	747	326



SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
	Moving Workers, Except Aircraft Cargo Handling Supervisors								
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	2	478	26	\$51,100	\$52,100	2,445	234	252
43-4051	Customer Service Representatives	2	3,294	397	\$30,800	\$38,500	4,509	539	1,845
53-2031	Flight Attendants	2	32	8	\$55,500	\$59,200			20
43-9061	Office Clerks, General	2	4,962	556	\$33,100	\$37,800	2,511	288	2,759
53-7064	Packers and Packagers, Hand	2	423	83	\$23,400	\$29,300	2,300	493	253
43-5053	Postal Service Mail Sorters, Processors, and Processing Machine Operators	2	143	4	\$52,600	\$51,400	8,203	872	74
43-5071	Shipping, Receiving, and Inventory Clerks	2	1,187	135	\$36,700	\$37,200	10,131	1,117	661
49-3011	Aircraft Mechanics and Service Technicians	1	147	10	\$66,600	\$69,000	854	91	157
53-2011	Airline Pilots, Copilots, and Flight Engineers	1	23	2	\$177,400	\$186,900	77	8	26
49-3023	Automotive Service Technicians and Mechanics	1	1,222	107	\$45,300	\$46,800	144	20	1,329
43-3031	Bookkeeping, Accounting, and Auditing Clerks	1	2,436	158	\$37,900	\$44,100	2,289	201	2,594
43-5011	Cargo and Freight Agents	1	94	18	\$44,200	\$47,200	4,718	494	112
53-7061	Cleaners of Vehicles and Equipment	1	659	107	\$25,200	\$29,400	126	26	766

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
43-5021	Couriers and Messengers	1	204	20	\$23,700	\$33,000	3,072	483	224
43-5032	Dispatchers, Except Police, Fire, and Ambulance	1	360	20	\$40,900	\$44,900	3,035	185	380
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	1	1,206	52	\$73,800	\$73,100	2,520	168	1,258
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1	2,180	98	\$54,700	\$62,000	2,207	268	2,278
11-1021	General and Operations Managers	1	3,802	262	\$113,000	\$125,700	9,810	593	4,064
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1	3,586	481	\$26,100	\$31,400	5,753	1,210	4,067
53-4011	Locomotive Engineers	1	98	2	\$68,200	\$70,700	329	18	100
49-9071	Maintenance and Repair Workers, General	1	2,467	230	\$41,300	\$43,800	760	30	2,698
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1	1,896	66	\$103,100	\$124,000	3,457	168	1,962
43-5051	Postal Service Clerks	1	137	4	\$53,700	\$51,200	7,778	992	141
43-5061	Production, Planning, and Expediting Clerks	1	597	41	\$55,600	\$52,000	1,525	93	637

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
53-4031	Railroad Conductors and Yardmasters	1	167	12	\$62,900	\$65,400	237	7	179
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks	1	72	15	\$47,300	\$45,700	4,164	470	87
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1	1,070	114	\$59,300	\$70,500			1,184
33-9098	School Bus Monitors and Protective Service Workers, All Other	1	225	105	\$35,500	\$36,100			331
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1	3,322	212	\$34,300	\$40,400	6,164	634	3,533
11-3071	Transportation, Storage, and Distribution Managers	1	248	19	\$91,200	\$105,100	6,243	268	267

**FIGURE 11: WHAT-IF SCENARIO – 250 NEW TRANSPORTATION AND WAREHOUSING (NAICS 48) OCCUPATIONS**

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
53-3032	Heavy and Tractor-Trailer Truck Drivers	41	3,354	321	\$43,900	\$48,700	2,029	197	90
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	34	3,703	543	\$32,200	\$33,700	107	7	125
53-3033	Light Truck Drivers	16	1,607	144	\$34,500	\$41,100	978	305	109
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	13	774	285	\$27,200	\$34,400	502	130	82
43-5052	Postal Service Mail Carriers	11	590	13	\$51,900	\$53,200	4,976	662	55
53-7065	Stockers and Order Fillers	11	3,485	438	\$30,100	\$31,000	23,558	5,046	357
53-7051	Industrial Truck and Tractor Operators	10	1,103	150	\$37,200	\$39,200	6,951	861	125
53-3052	Bus Drivers, Transit and Intercity	7	177	27	\$39,600	\$48,100	895	336	29
53-1047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	7	928	51	\$57,500	\$58,300	7,944	747	140
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	4	478	26	\$51,100	\$52,100	2,445	234	126
43-4051	Customer Service Representatives	4	3,294	397	\$30,800	\$38,500	4,509	539	923
53-2031	Flight Attendants	4	32	8	\$55,500	\$59,200			10
43-9061	Office Clerks, General	4	4,962	556	\$33,100	\$37,800	2,511	288	1,379
53-7064	Packers and Packagers, Hand	4	423	83	\$23,400	\$29,300	2,300	493	127

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
43-5053	Postal Service Mail Sorters, Processors, and Processing Machine Operators	4	143	4	\$52,600	\$51,400	8,203	872	37
43-5071	Shipping, Receiving, and Inventory Clerks	4	1,187	135	\$36,700	\$37,200	10,131	1,117	330
49-3011	Aircraft Mechanics and Service Technicians	3	147	10	\$66,600	\$69,000	854	91	52
53-2011	Airline Pilots, Copilots, and Flight Engineers	3	23	2	\$177,400	\$186,900	77	8	9
43-3031	Bookkeeping, Accounting, and Auditing Clerks	3	2,436	158	\$37,900	\$44,100	2,289	201	865
43-5011	Cargo and Freight Agents	3	94	18	\$44,200	\$47,200	4,718	494	37
43-5032	Dispatchers, Except Police, Fire, and Ambulance	3	360	20	\$40,900	\$44,900	3,035	185	127
43-1011	First-Line Supervisors of Office and Administrative Support Workers	3	2,180	98	\$54,700	\$62,000	2,207	268	759
11-1021	General and Operations Managers	3	3,802	262	\$113,000	\$125,700	9,810	593	1,355
43-5051	Postal Service Clerks	3	137	4	\$53,700	\$51,200	7,778	992	47
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks	3	72	15	\$47,300	\$45,700	4,164	470	29
49-3023	Automotive Service Technicians and Mechanics	2	1,222	107	\$45,300	\$46,800	144	20	665
43-5021	Couriers and Messengers	2	204	20	\$23,700	\$33,000	3,072	483	112
49-9071	Maintenance and Repair	2	2,467	230	\$41,300	\$43,800	760	30	1,349

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
	Workers, General								
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	2	1,896	66	\$103,100	\$124,000	3,457	168	981
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	2	1,070	114	\$59,300	\$70,500			592
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2	3,322	212	\$34,300	\$40,400	6,164	634	1,767
11-3071	Transportation, Storage, and Distribution Managers	2	248	19	\$91,200	\$105,100	6,243	268	134
13-2011	Accountants and Auditors	1	1,590	70	\$77,600	\$81,700	915	42	1,659
53-1041	Aircraft Cargo Handling Supervisors	1	13	1	\$57,700	\$59,600	679	41	13
53-6098	Aircraft Service Attendants and Transportation Workers, All Other	1	87	12	\$42,300	\$43,900			99
43-3021	Billing and Posting Clerks	1	680	52	\$35,000	\$41,600	3,908	296	732
53-5021	Captains, Mates, and Pilots of Water Vessels	1	192	26	\$81,600	\$89,700	2,098	70	218

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
53-7061	Cleaners of Vehicles and Equipment	1	659	107	\$25,200	\$29,400	126	26	766
53-2012	Commercial Pilots	1	77	8	\$95,500	\$110,800	192	26	85
53-3031	Driver/Sales Workers	1	859	79	\$26,900	\$31,900	1,215	377	938
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	1	1,206	52	\$73,800	\$73,100	2,520	168	1,258
13-1071	Human Resources Specialists	1	634	52	\$60,300	\$69,400	3,295	178	687
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	1	1,195	123	\$59,400	\$44,600	2,200	275	1,318
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1	3,586	481	\$26,100	\$31,400	5,753	1,210	4,067
53-4011	Locomotive Engineers	1	98	2	\$68,200	\$70,700	329	18	100
13-1081	Logisticians	1	246	11	\$96,500	\$79,800	2,917	137	257
53-7063	Machine Feeders and Offbearers	1	108	26	\$30,400	\$34,500	344	63	134
53-3099	Motor Vehicle Operators, All Other	1	100	27	\$32,900	\$40,200			127
43-4151	Order Clerks	1	216	11	\$34,100	\$37,700	767	44	227
53-6061	Passenger Attendants	1	86	45	\$24,600	\$30,400	5,469	442	131
11-9131	Postmasters and Mail Superintendents	1	19	0	\$77,400	\$79,700	3,274	162	20
43-5061	Production, Planning, and Expediting Clerks	1	597	41	\$55,600	\$52,000	1,525	93	637
13-1198	Project Management Specialists and Business	1	1,976	65	\$76,400	\$84,300	1,272	59	2,042

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidates per Opening
	Operations Specialists, All Other								
49-3043	Rail Car Repairers	1	271	17	\$56,500	\$58,300	1,296	226	288
53-4022	Railroad Brake, Signal, and Switch Operators and Locomotive Firers	1	84	4	\$50,600	\$55,900	3,818	384	87
53-4031	Railroad Conductors and Yardmasters	1	167	12	\$62,900	\$65,400	237	7	179
53-5011	Sailors and Marine Oilers	1	262	21	\$44,500	\$55,700	3,556	354	283
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	1	1,926	129	\$68,900	\$73,500	216	14	2,055
33-9098	School Bus Monitors and Protective Service Workers, All Other	1	225	105	\$35,500	\$36,100	–	–	331
33-9032	Security Guards	1	2,020	174	\$28,200	\$34,400	389	91	2,194
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	1	532	20	\$99,600	\$114,300	1,343	46	552
13-1151	Training and Development Specialists	1	302	20	\$66,500	\$67,400	3,140	177	322
43-5111	Weighers, Measurers, Checkers, and Samplers, Recordkeeping	1	115	10	\$34,200	\$38,100	5,796	657	125



## Occupational Gaps

*Occupational growth rates are constantly increasing and declining in various sectors. There are several reasons the occupation mix for a specific industry might change:*

- **Technology and production methods** – The introduction of new tools, automation, and technology can reduce the need for or replace workers. Advanced technology can bring new and often higher-paying jobs for individuals with more technical skills.
- **Outsourcing and organization** – As companies grow or restructure, contract workers often fill specific occupations, limiting employment growth within a company.
- **Replacing services or products** – Consumer preferences for products and services change over time, impacting employment for the associated occupations.

Examination into the potential occupation gaps (Figures 12 and 13), which is based on comparing occupation demand growth and projected educational attainment from residents, reveals the potential for supply shortfalls or saturation in the workforce—the annual supply gap.

Workers exiting the labor force and occupational transfers across industry sectors reveal jobs that will need to be filled in the coming years. The total annual demand forecast is based on the sum of projected employment growth and projected separations from the workforce. The separations are the sum of labor force exits and occupational transfers; however, this does not reflect the demand.

- When a region has an occupation that is expected to grow quickly but the educational requirements for the occupation do not match well with the educational attainment of residents, there is a high potential for an **occupation shortfall** (negative **red** number).
- Slow-growing or declining occupations due to factors such as automation or technology, as well as increasing supply, result in potential **saturation** (positive **green** number) in the market.

In noting these gaps, **OCEDC should coordinate with employers and education providers before layoffs to mitigate any negative employment impacts.** Workers are often unaware of training opportunities or cannot afford to take time off. If training is conducted on-site and in partnership with the employer, however, reskilling is more attainable and provides more long-term benefits.

**FIGURE 12: POTENTIAL ANNUAL OCCUPATION GAPS OVER TEN YEARS – ORANGE COUNTY**

SOC	Occupation	Projected Annual Gap or Surplus	Current Employment Q2 2021	Total Annual Demand	Projected Employment 2031
25-0000	Educational Instruction and Library Occupations	-10	1,911	167	1,907
11-0000	Management Occupations	-10	1,601	128	1,558
29-0000	Healthcare Practitioners and Technical Occupations	-7	683	45	717
13-0000	Business and Financial Operations Occupations	-6	816	76	806
49-0000	Installation, Maintenance, and Repair Occupations	-5	1,223	117	1,219
17-0000	Architecture and Engineering Occupations	-5	670	51	662
47-0000	Construction and Extraction Occupations	-4	1,760	194	1,753
21-0000	Community and Social Service Occupations	-3	304	37	330
15-0000	Computer and Mathematical Occupations	-3	320	25	334
19-0000	Life, Physical, and Social Science Occupations	-2	248	22	246
23-0000	Legal Occupations	-1	90	6	90
33-0000	Protective Service Occupations	-1	465	47	465
31-0000	Healthcare Support Occupations	-1	490	72	571
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	-1	265	28	260
45-0000	Farming, Fishing, and Forestry Occupations	0	38	6	35
37-0000	Building and Grounds Cleaning and Maintenance Occupations	0	679	92	705
39-0000	Personal Care and Service Occupations	1	608	91	628
53-0000	Transportation and Material Moving Occupations	4	1,882	227	1,831
51-0000	Production Occupations	6	2,668	270	2,468
43-0000	Office and Administrative Support Occupations	8	2,492	249	2,251
41-0000	Sales and Related Occupations	18	2,562	344	2,386
35-0000	Food Preparation and Serving Related Occupations	22	2,328	416	2,421

**FIGURE 13: POTENTIAL ANNUAL OCCUPATION GAPS OVER 10 YEAR – 45-MINUTE DRIVE TIME OF ORANGE COUNTY**

SOC	Occupation	Projected Annual Gap or Surplus	Current Employment Q2 2021	Total Annual Demand	Projected Employment 2031
29-0000	Healthcare Practitioners and Technical Occupations	-166	14,866	68	15,549
11-0000	Management Occupations	-118	16,509	-11	16,402
13-0000	Business and Financial Operations Occupations	-60	10,061	-14	9,918
25-0000	Educational Instruction and Library Occupations	-54	14,116	11	14,221
49-0000	Installation, Maintenance, and Repair Occupations	-44	12,825	-17	12,660
47-0000	Construction and Extraction Occupations	-38	23,254	43	23,680
17-0000	Architecture and Engineering Occupations	-38	5,830	-17	5,658
21-0000	Community and Social Service Occupations	-28	3,884	33	4,213
31-0000	Healthcare Support Occupations	-23	10,904	197	12,878
15-0000	Computer and Mathematical Occupations	-23	2,933	0	2,933
19-0000	Life, Physical, and Social Science Occupations	-14	2,667	-7	2,598
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	-10	2,805	-8	2,723
33-0000	Protective Service Occupations	-9	7,492	-19	7,301
23-0000	Legal Occupations	-6	1,778	-1	1,764
37-0000	Building and Grounds Cleaning and Maintenance Occupations	7	8,429	22	8,648
45-0000	Farming, Fishing, and Forestry Occupations	7	685	-6	627
39-0000	Personal Care and Service Occupations	22	6,517	27	6,788
53-0000	Transportation and Material Moving Occupations	46	20,698	-71	19,986
51-0000	Production Occupations	48	20,279	-168	18,597
43-0000	Office and Administrative Support Occupations	88	29,652	-285	26,806
41-0000	Sales and Related Occupations	184	24,826	-193	22,899
35-0000	Food Preparation and Serving Related Occupations	228	22,249	67	22,917

## Commuting Patterns

Figures 14 and 15 demonstrate the county’s position as the regional employment hub in the area, with the majority of residents working in the county. In addition, more than 5,000 employees commute in from outside the county. Potential or expanding employers can be confident that residents of the surrounding counties will drive to Orange County for employment opportunities.

**FIGURE 14: RESIDENTS OF ORANGE COUNTY, TEXAS AND WHERE THEY WORK**

FIPS	Region	Commuters
48361	Orange County, Texas	18,685
48245	Jefferson County, Texas	6,863
48201	Harris County, Texas	2,595
48199	Hardin County, Texas	545
22019	Calcasieu Parish, Louisiana	383
48241	Jasper County, Texas	290
48339	Montgomery County, Texas	254
48167	Galveston County, Texas	243
22023	Cameron Parish, Louisiana	227
48071	Chambers County, Texas	207
48039	Brazoria County, Texas	162
48157	Fort Bend County, Texas	150

**FIGURE 15: WORKERS IN ORANGE COUNTY, TEXAS AND WHERE THEY LIVE**

FIPS	Region	Commuters
48361	Orange County, Texas	18,685
48245	Jefferson County, Texas	769
48199	Hardin County, Texas	686
48201	Harris County, Texas	502
22019	Calcasieu Parish, Louisiana	447
48241	Jasper County, Texas	363
48351	Newton County, Texas	343
48339	Montgomery County, Texas	256
48157	Fort Bend County, Texas	208
48457	Tyler County, Texas	150
48039	Brazoria County, Texas	123

Federal Information processing Standards (FIPS) codes are numbers which uniquely identify geographic areas. The number of digits in FIPS codes vary depending on the level of geography. State-level FIPS codes have two digits, county-level FIPS codes have five digits of which the first two are the FIPS code of the state to which the county belongs.

Figures 14 and 15 further demonstrate the county's position as the regional employment hub in the area with most residents working in the county. In addition, the county draws in over 5,000 additional employees from outside the county. Potential or expanding employers can feel confident that the residents of the surrounding counties will drive to Orange County for employment opportunities.

## Product Review

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*One of the biggest limiting factors a community faces in competing for economic development projects is the availability of quality sites.*



There are several logistical assets that make property in the Orange County region more attractive to prospects, including:

- Interstate 10 and five major highways
- Burlington Northern Santa Fe, Kansas City Southern and Union Pacific rail lines
- Orange County Airport, Jack Brooks Regional Airport and Lake Charles Regional Airport
- Sabine-Neches Waterway
- The Port of Orange and access to the Port of Beaumont and the Port of Port Arthur
- Strong pipeline logistics

One of the challenges in presenting these assets is ensuring the message surrounding them is conveyed to its target audience. Fortunately, while the competition in economic development is greater than ever, so is the ability to get site information in front of decision-makers. Online databases and marketing materials are crucial for promoting industrial products and assets within a community or region. Ultimately, they increase a community's credibility and chance to win competitive projects.

First impressions matter, especially for those seeking to stand out in a highly competitive market. **While OCEDC has sites listed on Entergy's site and building database, due diligence associated with the sites should be addressed or emphasized in the site listings as well.**

Titles should be included under the documents and images tab on Entergy's website so users know which file will be showcased. Falcon Cove is listed as a featured property, but the listing states "Sorry, this property is no longer available" when the link is clicked. Improving the ease of access to sites and related documents is an opportunity to increase potential interest in those sites.

Using the checklist in Figure 16 can help rectify inconsistencies, inform and establish trust among potential customers, and improve asset awareness.

**FIGURE 16: COMPETITIVE PROPERTY CHECKLIST**

- Recent Aerial Photography**
- Letter of Commitment (if applicable)**
- Conceptual Site Plans**
- Covenants**
- Executive Summary**
- Flood Map**
- Foreign Trade Zone**
- Gantt Analysis/Timeline**
- Infrastructure Development Plants for Sites not Shovel Ready**
- Location/Vicinity Maps** *with local and regional amenities:*
  - Global
  - USA
  - Regional
  - County
  - City
  - Ingress/Egress Routes to Property
- New Market Tax Credits**
- Ownership/Tax Maps**
- Report/Summaries:**
  - Phase I
  - Environmental
  - Geotechnical
  - Soils
  - Wetlands
- Topography Map**
- Zoning Map** *with surrounding areas up to one mile*
- Utility Maps** *with existing and proposed utilities defined and providers). Consider using the [APWA color guide](#) to highlight current and proposed utility infrastructure.*
  - Broadband/Fiber
  - Electric
  - Natural Gas
  - Telecommunications
  - Water
  - Wastewater and Sewer

## Best Practices

- 01** Provide downloadable links to OCEDC existing KML/KMZ Google Earth files on executive summaries on online databases.
- 02** Drone videos and photography are an effective marketing tool. Enhance drone site footage to create **360°**, interactive drone photos for virtual site tours to engage prospective clients. [Kuula Pro](#) offers an inexpensive platform for virtual site tours.
- 03** [Creativemarket.com](#) offers inexpensive and customized templates (Microsoft Word and PowerPoint) that can be used to develop branded OCEDC executive summaries.

Color	Utility Line
WHITE	Proposed Excavation
PINK	Temporary Survey Markings
RED	Electrical Power Lines, Cables, Conduit and Lighting Cables
YELLOW	Gas, Oil, Steam, Petroleum or Gaseous Materials
ORANGE	Communication, Alarm or Signal Lines, Cables or Conduit
BLUE	Potable Water
PURPLE	Reclaimed Water, Irrigation and Slurry Lines
GREEN	Sewer and Drain Lines

## Review of Select Sites

To better understand the availability and positioning of OCEDC's sites, a driving tour and high-level review of eleven sites was conducted.

Online databases reviewed for Orange County, based on organic search for "Texas Industrial Site and Building Database":

- (1) [State of Texas Industrial & Commercial Sites and Buildings](#) –Orange County resulted in **zero** property results.
- (2) [Entergy's Site Selection Center \(Texas\)](#) – 57 Sites & two (2) Buildings

The biggest asset in Orange County regarding logistics, distribution and warehousing is its availability of sites adjacent to or in close proximity to Interstate-10. I-10 access is a major consideration due to its ease of east-west movement at interstate speeds very quickly upon exiting the facility. The top five sites are subdividable, undeveloped and unencumbered. Each top site allows the client to get in on the "ground floor" as to how the site gets developed and therefore gives the client the maximum flexibility in determining the fit for their structure and operation. It is possible that the top sites could end up in competition with each other (bidding war) and be within a few miles of each other. This gives the client a variety of sites that could work in a very small radius and maximum cost control leverage verses other sites that might work in neighboring communities, e.g., Lake Charles, LA or Houston, TX. The bottom six properties all have special-use and/or existing structures on the sites that would require a specific industry/user and or potentially expensive site preparations. These sites as noted in Figure 11 and could rise to the #1 position for the client that needed to be at the port (#6 & 7), or #1 for Chemical #5, or #1 for rail car storage #11. This ranking helps OCEDC respond to each RFP with the most advantageous sites for that specific RFP based on the client requirements.

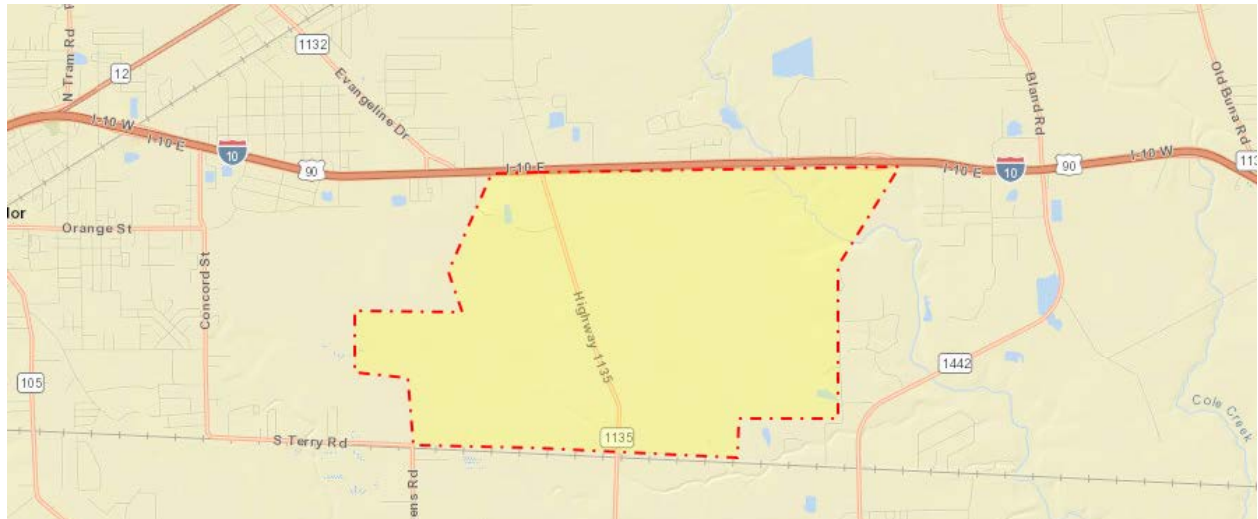
**Figure 18: 11 Site Review Ranking**

FQL Ranking	Site Name (link to Entergy database)	Acreage	Interstate 10 Access	Building	Buildable	Readiness	Rail Access	Port Access
1	<a href="#">Orange Crossing</a>	3,600	Adjacent to I-10	no	Hwy 1135 intersects the Mega Site	Grading	UP & BNSF	no
2	<a href="#">Eagle Point</a>	245	Adjacent to I-10	no	Yes	Grading	no	no
3	<a href="#">Hwy 62 and I-10 East</a>	47	Adjacent to I-10	no	Eastbound frontage of I-10 Long and Skinny Shape	Grading	no	no



4	<a href="#">Countryland 255</a>	255	.1-3.7 miles	no	Lowland water	Grading	no	no
5	<a href="#">Falcon Cove</a>	2,150	1.5-4.5 miles	no	Lowland water, lots of pipelines, #1 for Chemical	Grading	no	no
6	<a href="#">Port Industrial Park</a>	100	1.3-3.1 miles	some	Lowland water #1 for Port Site	Grading	no	Yes
7	<a href="#">Westport Shipyard</a>	83	0-1.8 miles	no	Yes	Grading	no	Yes
8	<a href="#">Equitable Bag</a>	217,700 S.F.	.1-2.1 miles	3 totaling 217,700 S.F.	3 Existing buildings	Retrofit	UP Spur	No
9	<a href="#">Hwy 62 and Womack</a>	77	0-.7 miles	yes	smaller industrial or mixed use	Grading	UP	no
10	<a href="#">Hwy 62 and Hwy 87</a>	131	0-3.7 miles	no	yes- mixed use & residential	Grading	no	no
11	Trinity Industries	36.8	2 miles	3 totaling 117,800 S.F.	3 Existing buildings	Rail Use	26,499 feet of track	No

## Orange Crossing Industrial Park



<b>Location</b>	Directly adjacent to I-10, not within city limits
<b>Property Size</b>	3,600 acres
<b>Ownership</b>	Not specified – for lease, not for sale
<b>Property Type</b>	Industrial (according to Entergy’s site and building database)
<b>Utilities</b>	Not specified if utilities are onsite and/or in close proximity to the site
<b>Transportation</b>	<ul style="list-style-type: none"> <li>- Approximately 100 miles from Houston, TX</li> <li>- Directly adjacent to Interstate 10, Burlington Northern (BN) Rail Line and Union Pacific (UP) Rail Line</li> <li>- 8.9 miles from Orange County Airport.</li> <li>- Within 13 miles of three ports</li> </ul>
<b>Key Attributes/ Opportunities</b>	<p>Large track of land with:</p> <ul style="list-style-type: none"> <li>- 1-10 offering multiple access points to the site</li> <li>- BN and UP boarding the southern portion of the site, offering multiple rail spur opportunities</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>- Two pipelines intersect the site on the central and east portions</li> <li>- Sabine RA Canal and a drainage canal intersect the property on the west and central portion</li> <li>- State Highway 1135 divides the site into west and east parcels</li> <li>- Lack of online due diligence conducted leaves potential investors uncertain of potential risks and mitigation</li> <li>- Heavily timbered decreases speed to market for a company</li> </ul>

## Eagle Point



<b>Location</b>	Directly adjacent to I-10, not within city limits
<b>Property Size</b>	245 acres (although some documents reference 265 acres)
<b>Ownership</b>	Not specified – for sale only
<b>Property Type</b>	Commercial (according to Entergy’s site and building database)
<b>Utilities</b>	Not specified if utilities are onsite and/or in close proximity to the site
<b>Transportation</b>	Frontage road access to I-10 and additional site access via hwy 62 which provides a high level of visibility for the site.
<b>Key Attributes/ Opportunities</b>	Access road already constructed through the western portion of the site
<b>Barriers</b>	Much of the site resides in a 0.2 PCT Annual Chance Flood Hazard which could limit building size and placement. While this is low to moderate chance of flooding, OCEDC should provide a cost estimate and gantt chart timeline for construction of building pads, parking lots, etc. to potential clients.

## Highway 62 & I-10 (Eastbound)



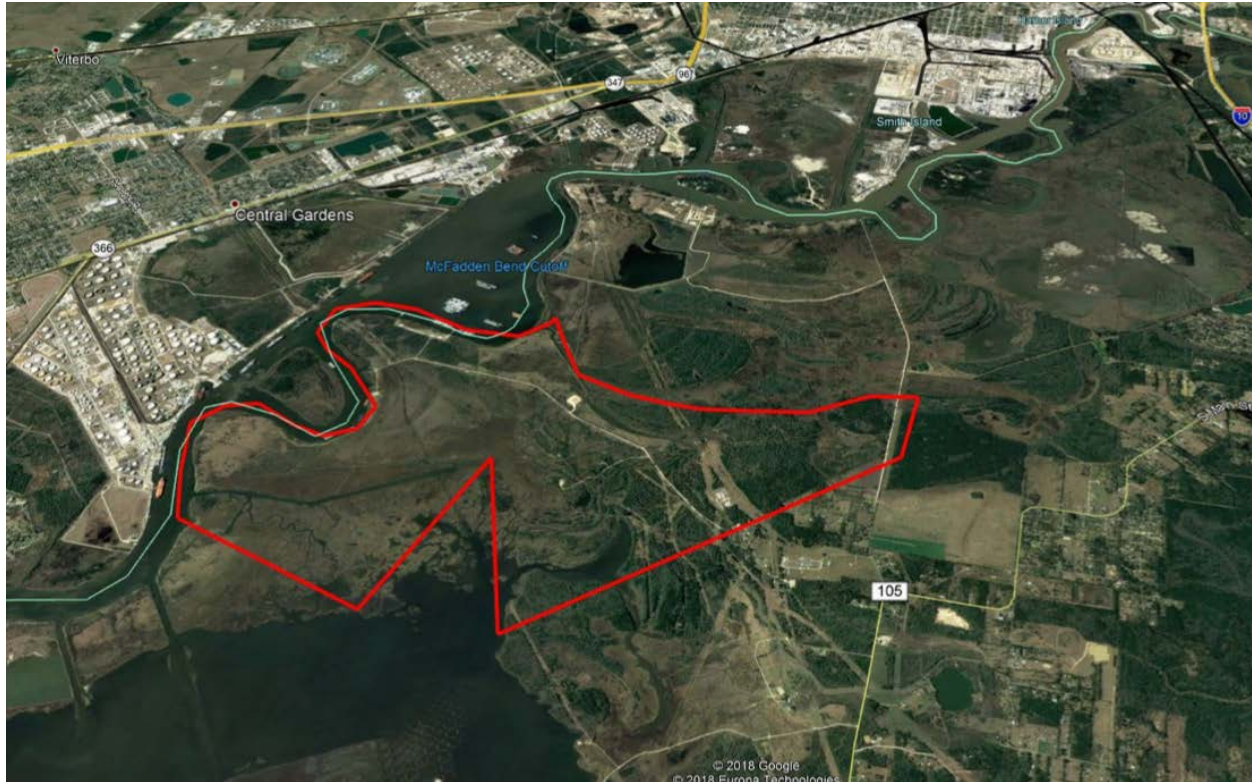
<b>Location</b>	Directly adjacent to I-10, not within city limits
<b>Property Size</b>	47 acres (although some documents reference 265 acres)
<b>Ownership</b>	<b>Not specified</b> – entire site for sale only, does not appear to be subdividable
<b>Property Type</b>	Approximately 5 acres are zones I-10 Development Corridor, while the remaining acreage is not zoned
<b>Utilities</b>	<b>Not specified if utilities are onsite and/or in close proximity to the site</b>
<b>Transportation</b>	Frontage road access to I-10 and additional site access via hwy 62 which provides a high level of visibility for the site
<b>Key Attributes/ Opportunities</b>	Great visibility, with frontage road access
<b>Barriers</b>	Shape of property (long and skinny) may limit building size and configuration

## Countryland 255



<b>Location</b>	Access to four-lane divided hwy 87 via road 1006, not within city limits
<b>Property Size</b>	225 Acres
<b>Ownership</b>	<b>Not specified</b> – entire site for sale only, does not appear to be subdividable
<b>Property Type</b>	Commercial & Industrial (according to Entergy's site and building database)
<b>Utilities</b>	<b>Not specified if utilities are onsite and/or in close proximity to the site</b>
<b>Transportation</b>	Access to four-lane divided hwy 87 via road 1007 and within 3.5 miles to I-10
<b>Key Attributes/ Opportunities</b>	Near established industries – assuming upgraded utilities and infrastructure serving those industries would be available for this property.
<b>Barriers</b>	Site is near Cow Bayou and Coon Bayou. OCEDC would need to provide flood and topography maps for the property.

## Falcon Cove



<b>Location</b>	Directly adjacent to the Neches River, not within the city limits
<b>Property Type</b>	2,150 acres, subdividable
<b>Ownership</b>	Not specified, not specified if for sale and/or lease
<b>Zoning</b>	Industrial (according to Entergy's site and building database)
<b>Utilities</b>	Not specified if utilities are onsite and/or in close proximity to the site
<b>Transportation</b>	<ul style="list-style-type: none"> <li>- 1.5 miles to Hwy 347</li> <li>- 5.8 miles to I-10</li> <li>- Adjacent to Neches River</li> <li>- Kansas City Southern rail onsite</li> </ul>
<b>Key Attributes/ Opportunities</b>	<p>Large track of land with:</p> <ul style="list-style-type: none"> <li>- Direct access to the Neches River – 5 miles of deep water frontage (40 ft depth)</li> <li>- Access roads throughout the site</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>- Underground pipeline may limit development locations</li> <li>- Much of the site resides in a 1% Annual Chance Flood Hazard and wetlands. While this is low to moderate chance of flooding, OCEDC should provide a cost estimate and gantt chart timeline for construction of building pads, wetlands mitigation, etc. to potential clients.</li> </ul>



## SWOT Analysis & Leverage Points

Based on conversations with stakeholders and the in-depth labor and industry research, the region's strengths, weaknesses, opportunities and threats were identified in relation to the region's ability to recruit the target sector. This analysis relied heavily on qualitative input as well as industry knowledge.



### STRENGTHS

- Strong infrastructure logistics, with rail, interstate, and port access
- Capital investment projects making an impact on the region
- Serviced by Entergy
- Port of Orange located on the Sabine River with access to the Gulf of Mexico
- Strong support of and belief in OCEDC staff
- Good relationships between OCEDC and stakeholders



### WEAKNESSES

- Multiple bridge constructions between Orange County and Lake Charles
- I-10 construction
- Confusion among workforce coordination
- Few cultural amenities
- Limited affordable housing options
- Lack of healthcare options
- Few site listings and developers in the region
- Topography challenges for many sites



### OPPORTUNITIES

- Develop partnerships with surrounding counties for projects and product development
- Increase achievement in K-12 schools
- Increase workforce coordination
- Encourage workforce toward Warehousing industry
- Connect education with workforce
- Opportunities with Port of Orange County



### THREATS

- Traffic and connectivity
- Quality of life
- Perceptions surrounding potential hurricanes
- Water drainage issues
- Lack of forward-thinking city planning

## Target Opportunities for OCEDC

Manufacturing is Orange County’s largest industry sector, both in terms of employment and GDP. Per covered employment establishment counts, there were seventy-seven Manufacturing establishments in Orange County, Texas, in 2020, unchanged from 2010.

Manufacturing produced \$1.8 billion in GDP in 2020 according to data from JobsEQ, representing 53.6 percent of Orange County’s total GDP. Over the 2010–2020 period, Orange County has seen a 2.6 percent average annual increase in Manufacturing contributions to GDP. The output per worker is \$1,269,000, more than twice the national average (\$514,000). A higher output per worker leads to increases in wealth and higher average standards of living in the region.

As of 2021Q2, Manufacturing establishments in Orange County were estimated to make \$3.9 billion in annual purchases from suppliers across the United States, with about \$1.1 billion (29 percent) of those purchases being made from businesses located within Orange County.

**FIGURE 17: MANUFACTURING PURCHASES WITHIN AND OUTSIDE OF ORANGE COUNTY**

6-digit Supplier Industries	Purchases from In-Region (\$M)	Purchases from Out-of-Region (\$M)
Petrochemical Manufacturing	\$380.8	\$0.4
All Other Basic Organic Chemical Manufacturing	\$282.7	\$0.6
Petroleum Refineries	<\$0.1	\$156.9
Corporate, Subsidiary, and Regional Managing Offices	\$3.6	\$146.3
Other Basic Inorganic Chemical Manufacturing	\$79.8	\$32.8
Remaining Supplier Industries	\$391.4	\$2,395.5
<b>Total</b>	<b>\$1,138.2</b>	<b>\$2,732.5</b>

Demand for manufacturing space rose at unprecedented rates (nearly 93 percent over the past year according to a 2021 [Industrial Tenant Demand Study](#)) due to an increase in demand caused by reshoring to reduce the long supply chains, disruptions and higher costs experienced due to the pandemic. Many companies are reevaluating and moving workers and production facilities closer to their existing customers or relocating plants closer to suppliers, while others are buying their suppliers or bringing former contract work in-house. Thus, the transportation, distribution and logistics sector is experiencing continued growth as it connects manufacturers and other companies to consumers. With the drastic increase in e-commerce, parcel delivery and warehousing operations, and available products, an abundance of skilled and trained employees are needed to transport goods from one location to another safely and on time.



The supply chain process has experienced tremendous change over the last 100 years. All aspects of how we source, manufacture and transport goods have transformed – resulting in more complex yet efficient supply chains. Advantages to the logistics industry expansion continue while more technology is incorporated into the supply chain to be more efficient and offset some of capacity constraints due to seasonal peaks, the pandemic, and worker shortages.

## Warehousing and Storage Location Economic Project Drivers:

Companies in the Warehousing and Storage sector are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods, but do not sell the goods they handle.

They may also provide a range of services, often referred to as logistics services, related to the distribution of goods. Logistics services can include labeling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing, and transportation arrangement. Establishments in this industry group always provide warehousing and storage services in addition to any logistics services. Furthermore, the warehousing or storage of goods must be more than incidental to the performance of other services.

### Warehousing and Storage (NAICS 493) Location Factor Industry Standards

- **Multimodal Logistics Infrastructure (40%)**
  - o Interstate/controlled four-lane access
  - o Roads in good condition with recent repairs/upgrades
  - o Limited highway congestion
  - o Mainline and short line rail access
  - o Navigable waterways
  - o Commercial airport with cargo facilities
- **Available and Affordable Workforce (30%)**
  - o Average hourly wage at or below industry average based on BLS data
  - o Presence of community or technical college offering transportation-related courses
  - o Customized programs available to train transportation workers
  - o Distribution/logistics programs at university or technical college within sixty miles
- **Available Sites and Buildings (10%)**
- **Market Proximity (10%)**
  - o Proximity to customers or suppliers
- **Cost of Doing Business (5%)**
  - o Rental/facility cost
  - o Tax burden (state and local)

- Utility cost
- Wage cost
- **Financial Incentives (5%)**
  - State incentives
  - Local match
  - Other local incentives

## OCEDC Targets:

The pandemic has brought new opportunities to the Texas real estate market as individuals and businesses seeking a business-friendly environment and a relatively low cost of living have relocated to Texas. Dallas, Austin, and Houston have experienced the majority of recent growth. As markets become saturated and competition for housing inventory and human capital continues to tighten, this presents increased opportunity for more rural markets near these Texas hotspots.

The pandemic has also accelerated the demand for home deliveries and increased e-commerce operations, thus driving the need for expanded Transportation, Distribution, and Logistics operations across the nation.

According to a recent *Wall Street Journal* article, [Farewell Offshoring, Outsourcing, Pandemic Rewrites CEO Playbook](#), companies have experienced trouble obtaining raw materials, hiring production workers, and booking space on shipping vessels since the pandemic began. Input shortages and supply chain bottlenecks are continuing to disrupt the availability and quality of goods and services.

These disruptions, caused by the drastic alteration in the supply of and demand for products, goods, and services, have significantly impacted all aspects of the supply chain, creating new logistics hotspots across the nation.

Numerous market and economic considerations are in the mix as companies determine where to locate their next facility to take advantage of this opportunity. Access to markets (nationally and globally), utility costs, talent availability, education opportunities, real estate costs, and state/local incentives all play a role in the decision-making process.

### **ORANGE COUNTY REGIONAL WAREHOUSING AND STORAGE GROWTH**

From 2010–2020, employment in Warehousing and Storage in the Orange County regional forty-five-minute drive time has increased by 1,285 jobs. After adjusting for national growth during this period and industry mix share, the portion of this employment change due to local competitiveness was 523 jobs.

Per covered employment establishment counts, there were thirty-seven Warehousing and Storage establishments in the Orange County regional forty-five-minute drive time in 2020, an increase from thirty-four establishments in 2010.

## LOGISTICS/PARCEL DELIVERY

» **Industry** // Air freight and parcel carriers, rail freight, trucking and shipping, warehouse and storage

» **Examples** // Amazon, FedEx, UPS, USPS, DHL, Hackbarth, Lone Star Overnight (LSO), TForce

One major effect of the influx of e-commerce activity brought on by the pandemic has been increased online ordering activity, which has caused severe impacts on logistics and parcel delivery operations. As the nation reopens, e-commerce growth has not slowed. This continued surge has forced many companies to adjust to and manage record volumes, tight capacity, and increased costs while attempting to retain a consistent level of service.

With e-commerce and traditional retailer companies becoming more digitized, logistics and parcel delivery companies will continue to expand alongside them. According to JLL's 2021 Industrial Tenant Demand Study, logistics and parcel delivery is the most active cluster in nearly every region across the nation. The south-central portion of the U.S. (New Mexico, Texas, Oklahoma, and Arkansas) experienced a 27.4 percent increase in logistics and parcel demand from 2020 to 2021.

Those not using distribution centers must plan how to ship goods across the continental U.S. Many small businesses opt to use USPS due to its reliability and cost effectiveness. Figure 18 displays the USPS shipping zones from Orange County, indicating the large portion of the U.S. population accessible within Zones 1–4.

Shipping Zone	Mile Radius from Origin	Population from Orange Co.	10-Year Historic Growth Rate
Zone 1 (Local)	50-mile radius	650,412	1.9%
Zone 2	51 – 150-mile radius	650,412 – 9,419,449	1.9% – 15.6%
Zone 3	151 – 300-mile radius	9,419,449 – 30,656,039	15.6% – 14.8%
Zone 4	301 – 600-mile radius	30,656,039 – 48,310,549 (500-mile radius)	14.8% – 10.8%

Source: ShipBob and StatsAmerica's Big Radius Tool – 500-mile radius limit for Big Radius Tool.

As consumers increasingly turn to e-commerce for shopping needs, efficient fulfillment and distribution centers are expanding and adopting new technologies to increase parcel volume and expedite deliveries. In supply chain management and transportation planning, last-mile delivery refers to the last leg of a journey, comprising the movement of goods from a transportation hub to a destination.

Over the past few years, FedEx and UPS have dominated the market share of last-mile delivery, but new service providers and platforms have been on the rise, and continued growth is expected. DoorDash, Postmates, Shipt and Uber all provide last-mile delivery services.

*Orange County Leverage Points:*

- Orange County is in close proximity to five of the top twenty fastest growing cities in the U.S. based on [2020-2025 projections](#).



- Researchers at the [University of Texas at Dallas](#) are exploring how retail drone delivery could change logistics networks.
- The condition of the infrastructure in rural areas is a concern for cargo and package pickup and delivery. According to the [Texas Freight Mobility Plan](#), of the 7,863 projects that are currently under planning or in development, many are in rural areas of Texas, including Orange County.

## E-COMMERCE

» **Industry** // Companies that are involved with the buying and selling of goods and services online, including four market segments: business-to-business, business-to-consumer, consumer-to-consumer, consumer-to-business

» **Examples** // Alibaba, Amazon, Chewy, eBay, Shopify, Walmart, Wayfair

Prior to the pandemic, the increase in online sales was a key driver in the growth of the industrial real estate sector. Area Development's [Latest Trends in the Industrial Real Estate Sector Here to Stay](#) reported that the industrial real estate sector has experienced a complete transformation brought about by changes in the retail sector, warehouse design, and supply chains. Referencing JLL's research, the article reported that pre-pandemic, approximately 35 percent of all industrial leasing was directly linked to e-commerce.

Beginning March 2020, online sales experienced a dramatic increase in growth, as did the demand for distribution space—resulting in much of the industrial leasing demand in 2020. Amazon accounted for more than half of total U.S. industrial absorption. Communities and regions across the nation experienced a flood of investment dollars into the industrial real estate sector and the infrastructure (e.g., warehouses) needed to build out the same-day/next-day delivery network.

As e-commerce continues to soar, so does the demand for cross-dock warehousing and logistic centers across the nation and throughout Texas. Orange County's location, however, could present a challenge in attracting e-commerce distribution centers.

There are four main requirements in the search process:

- **Market Proximity to Customers or Suppliers** – Many e-commerce distribution centers are exploring locations in urban or densely populated areas (i.e., metropolitan areas/regions).
- **Land Scale** – Large distribution centers often need both a large building footprint and additional acreage for truck and employee parking.
- **Speed to Market** – E-commerce distribution centers often require either existing buildings or shovel-ready sites that will allow construction to begin almost immediately following the site location announcement.
- **Workforce** – A large (including seasonal) workforce near the distribution center is needed. According to a recent [article](#) by Area Development, “studies have shown that [e-commerce companies] utilize three times more labor than traditional warehouse operations.”

### *Orange County Leverage Points and Community Considerations:*

- Inventory that resides in the state for a short period of time (175 days or less) and will be transported outside of Texas may be tax exempt via a freeport exemption. This could lead to a sizable reduction in a company's inventory value and reduced taxes.

- Land constraints becoming an issue for urban markets could be an opportunity for Orange County to highlight its large sites and access to growing markets.
- Since speed to market is a search process requirement, OCEDC should either prepare some pad-ready sites or effectively demonstrate site prep time and costs via a detailed Gantt chart.

## TRADITIONAL RETAIL

» **Industry** // Companies that are involved with buying and selling of good and services online, including four market segments: business-to-business, business-to-consumer, consumer-to-consumer, consumer-to-business.

» **Examples** // Best Buy, Costco, Home Depot, Ikea, Lowes, Target, Walmart

According to JLL, traditional retailers are extremely active, and facilities typically require one million square feet or more, with e-commerce comprising a portion of the facility. Demand for warehouse space has risen consistently over the past few years and remains tight. As businesses continue to revamp and upgrade their supply chains, there is ongoing pressure to deliver efficiently and economically.

Mass Merchandisers, which are retailers or retail stores that sell large quantities of goods quickly by offering discounts, customer self-service, or plain displays and packaging (e.g., a warehouse stock/showroom), comprise the fastest growing category in the traditional retail market. Home improvement stores and garden/landscaping retail stores saw a spike in 2020 but have since leveled off. Grocery and consumer electronics have seen a slight but steady increase in the marketplace.

### *Orange County Leverage Points and Community Considerations:*

- Four regional institutions are graduating nearly 1,100 students annually from postsecondary retail-related programs, providing a pipeline of future workers.
- Per covered employment establishment counts, there were 243 General Merchandise Stores establishments in the Orange County forty-five-minute drive time in 2020, an increase from 176 establishments in 2010.
- Entergy's utility-operating companies provide electricity at some of the lowest rates to retail customers, according to a recent [study](#) by S&P Global Market Intelligence.

## FOOD & BEVERAGE MANUFACTURERS

» **Industry** // Companies involved in processing, packaging, and distributing raw food materials, including fresh, prepared foods as well as packaged foods, and alcoholic and nonalcoholic beverages

» **Examples** // Anheuser-Busch InBev, Coca-Cola, JBS, Nestlé, PepsiCo

Food and beverage manufacturers can range from small, manual operations with limited employs to large, global manufacturers that incorporate highly automated processes. In addition to production lines, these manufacturers typically require significant storage, including dry storage or cooler/freezer space, and warehousing operations for raw goods or finished products. Products are transported to either a distributor or the end consumer.

Nationally, the food and beverage industry sector has seen steady growth in a variety of distribution channels, including supermarkets, hypermarkets, convenience stores and online. Well-established companies have typically driven market growth; over the past few years, however, private-label brands have been making significant investments across the nation. According to [Grand View Research](#), “increasing innovations in food packaging, plant-based products, bold flavors, and healthy ingredients are expected to contribute to the growth of the U.S. market over the next few years.”

One of the major, ongoing challenges for the Food and Beverage Manufacturing industry is the availability of labor. The struggle to find workers is often due to the unpleasant work environment perceptions, including odors, noise, and temperature conditions.

### *Orange County Leverage Points and Community Considerations:*

- Orange County’s region boasts more than 5,700 employed in occupations within the Agriculture, Food, and Natural Resources cluster.
- Education institutions in Orange County offer fourteen degree programs that graduate more than 250 annually in the Agriculture, Food, and Natural Resources cluster.
- The [Texas Food Processors Association](#) (TFPA) is a nonprofit trade association representing companies engaged in the production of food products. It includes companies that provide the processors with necessary raw materials, packaging, equipment, plant layout and design services, laboratory testing, and a variety of business services.
- Orange County’s geographic region could serve as a regional hub to service six of the [twenty most populated cities](#) in the nation.
- As water availability decreases in areas around the nation, Orange County has the ability to provide raw water, uncontracted to clients.

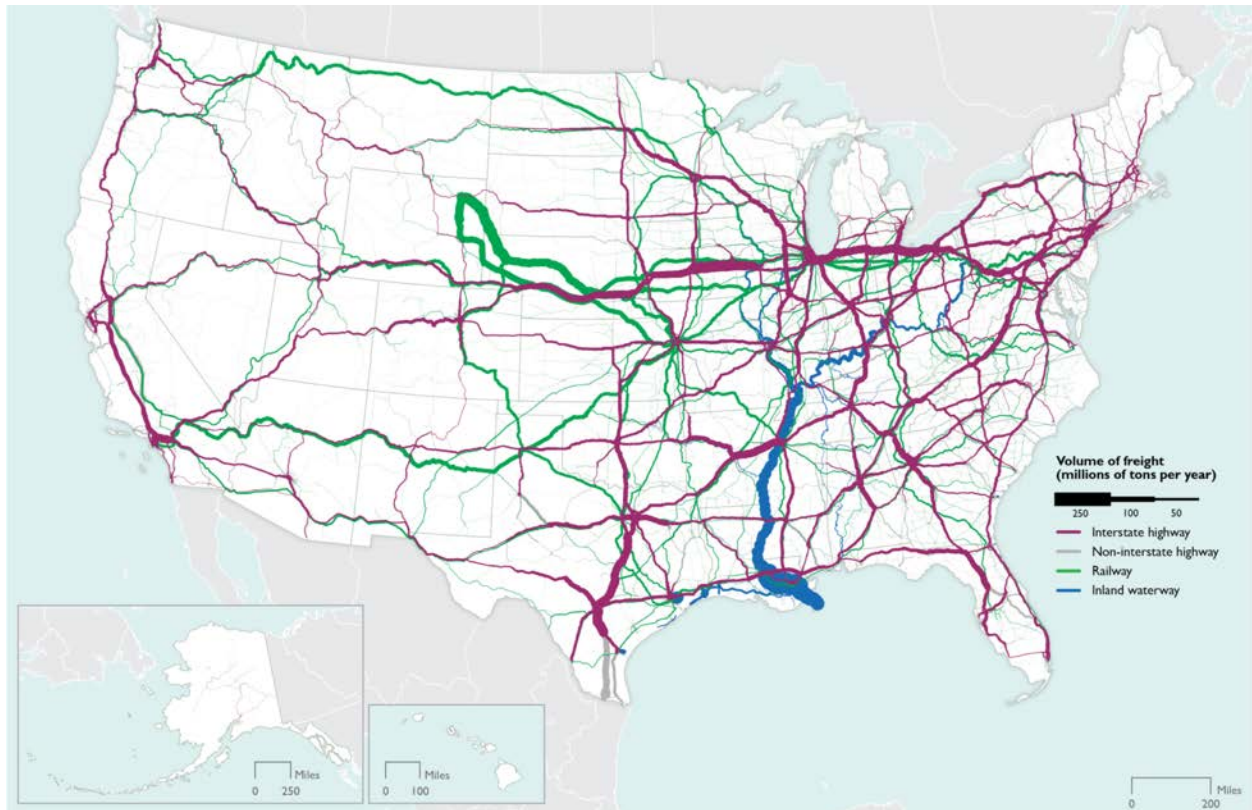


## FREIGHT TRANSPORTATION

» **Industry** // Companies involved in the process of moving merchandise, goods, cargo, and other products from one place to another

» **Examples** // FedEx Freight, Old Dominion Freight Line, XPO Logistics, YRC Logistics

**FIGURE 19: 2017 FREIGHT FLOWS BY HIGHWAY, RAILWAY, AND WATERWAY**



Source: Highway: U.S. Department of Transportation (USDOT), Bureau of Transportation Statistics and Federal Highway Administration, *Freight Analysis Framework*, version 4.5, 2019. Railway: USDOT, Federal Railroad Administration, 2019. Inland Waterway: U.S. Army Corps of Engineers, Institute of Water Resources, *Annual Vessel Operating Activity and Lock Performance Monitoring System data*, 2018. Highway flows depicted in the map are based on the *Freight Analysis Framework* data for 2015. Waterway and port tonnages are based on data for 2017, and railways are based on 2016 data. 1 short ton = 2,000 lbs.

The freight transportation market experienced a puzzling performance even prior to the pandemic. According to a 2020 [article](#) by McKinsey, “U.S. Freight after COVID-19: What’s Next?”:

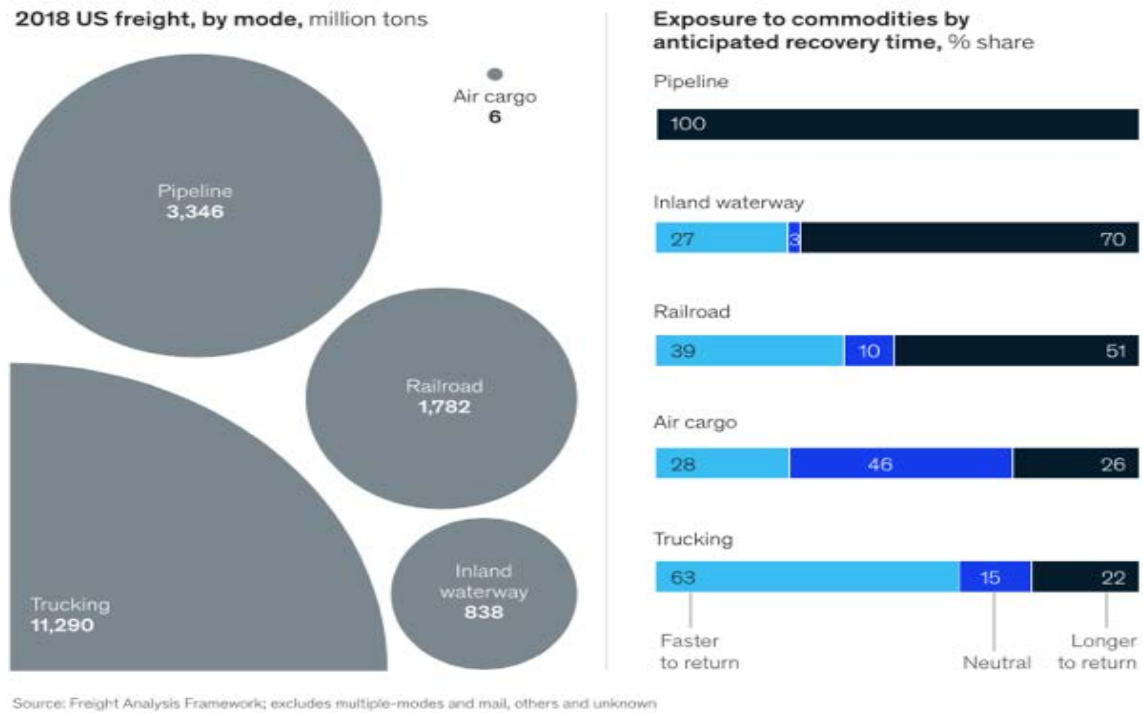
*Compared with last year, trucking volumes initially increased by about 30% in 2020 as a result of panic buying, then dropped markedly, and are now ticking back up again. Railroad volumes declined by 20% and have not recovered. Last-mile deliveries have surged more than ten times over, but ocean shipping is down by 25%.*

Freight companies across the nation are scrambling to understand the market as the economy starts growing again. Freight companies' recovery paths will be based on their mix of customers and products, according to McKinsey. Figures 20 and 21 highlight which commodities are likely to rebound faster and the projected effect on individual modes of transportation. Recovery in each mode will depend on its commodity mix.

**FIGURE 20: EXPECTED FREIGHT REBOUND BY COMMODITY**

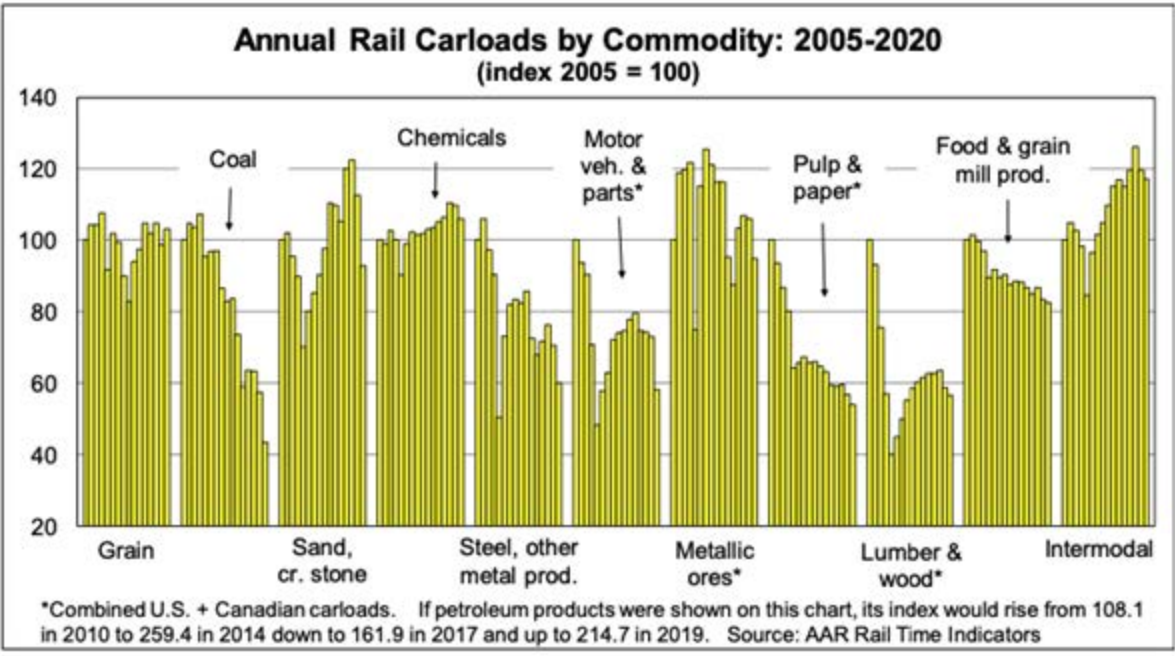
Key Factors impacting COVID-19 Recovery		U.S. Freight by Commodity Type	Million tons					
<b>COMMODITIES PROJECTED TO HAVE A SHORTER RETURN</b>								
<table border="1"> <tr> <td style="text-align: center;">↑</td> <td>Increased demand for consumer essentials</td> </tr> <tr> <td style="text-align: center;">↑</td> <td>National priority</td> </tr> <tr> <td style="text-align: center;">↑</td> <td>Acceleration of e-commerce</td> </tr> </table>	↑	Increased demand for consumer essentials	↑	National priority	↑	Acceleration of e-commerce	Basic Commodities	4,395
	↑	Increased demand for consumer essentials						
	↑	National priority						
	↑	Acceleration of e-commerce						
	Agricultural Products	2,334						
Food & Grocery	1,531							
Animal Feed	334							
	Pharma	38						
<b>COMMODITIES PROJECTED TO HAVE A NEUTRAL RETURN</b>								
<table border="1"> <tr> <td style="text-align: center;">↓</td> <td>Lower income &amp; consumer demand for nonessential goods</td> </tr> <tr> <td style="text-align: center;">↑</td> <td>Potential reshoring</td> </tr> </table>	↓	Lower income & consumer demand for nonessential goods	↑	Potential reshoring	Manufacturing	1,410		
	↓	Lower income & consumer demand for nonessential goods						
	↑	Potential reshoring						
Other	610							
	Electronics	91						
<b>COMMODITIES PROJECTED TO HAVE A LONGER RETURN</b>								
<table border="1"> <tr> <td style="text-align: center;">↓</td> <td>Slowdown in US oil &amp; gas production</td> </tr> <tr> <td style="text-align: center;">↓</td> <td>Declining demand for nonessentials</td> </tr> <tr> <td style="text-align: center;">↑</td> <td>Potential reshoring</td> </tr> </table>	↓	Slowdown in US oil & gas production	↓	Declining demand for nonessentials	↑	Potential reshoring	Oil & Coal Products	6,726
	↓	Slowdown in US oil & gas production						
	↓	Declining demand for nonessentials						
	↑	Potential reshoring						
Basic chemicals	478							
Paper, Furniture & Textiles	428							
	Automotive	243						

**FIGURE 21: FREIGHT VOLUME AND ANTICIPATED RECOVERY TIME BY MODE**



During the first half of 2019, the nation’s ports experienced growing container volumes, while rail cargo slowed due to intense competition from trucking. The latest [U.S. Freight Transportation Forecast](#) from the [American Trucking Associations](#) (ATA) predicts freight volumes will grow 36 percent between 2020–2031.

While trucking has increase, rail commodity has been on the decline for the past 15 years. While the reasons vary, some are out of railroads’ control, including economic changes in the manufacturing sector and an increasing trend towards smaller shipments over shorter distances – resulting in increased trucking services. Reasons behind the decline include unreliable and inconsistent rail service, but there is still an ease of doing business and competitive negotiation rates within the trucking industry.



*Orange County Leverage Points and Community Considerations:*

- Interstate 10, the fourth-longest interstate in the nation, is also the southernmost cross-cutting interstate in America, connecting markets from California to Florida.
- Orange County's two waterways and well-established ports offer options to industries in Texas, across the nation, and to international markets.
- Orange County's three Class 1 rail carriers, Burlington Northern Santa Fe, Kansas City Southern and Union Pacific, ensure businesses have access to all regions of North America.

## MAINTENANCE & REPAIR OPERATIONS

» **Industry** // *Maintenance, Repair and Operations — or sometimes Maintenance, Repair and Overhaul — refers to equipment, tools and activities associated with the daily operations of a business. It does not include materials, products and services that are directly used in production.*

» **Examples** // *Beacon Maritime, Eagle Railcar Services, TrinityRail*

Economic growth has led to a rise in volume and demand for trucking fleets, resulting in the need for additional carrying capacity, both in additional trucks and vehicle mileage, which increases service requirements. Costs for parts and labor for fleet repairs rose over the first half of 2021, according to American Trucking Associations' [Technology & Maintenance Council and Decisiv Inc](#): repair and maintenance labor costs rose 2.6 percent, overall parts costs rose 2.8 percent, parts costs for tires rose 10.7 percent, transmission parts costs rose 9 percent, and brake costs rose 11.1 percent.

When the pandemic restricted commercial airline flights around the world, airlines shifted their focus to overhauling and servicing their grounded fleets.

Rail maintenance service is an \$8 billion industry that provides specialized services for railroad transportation including: servicing, routine repairs, railcar maintenance on railcars, loading and unloading of railcars and operating independent rail terminals operations.

### *Orange County Leverage Points and Community Considerations:*

- Orange County's existing Maintenance, Repair and Operations industries are a key economic driver in the community. Developing ongoing relationships (e.g., through BR&E visits) can provide detailed data on future expansions.
- Availability of TrinityRail's former site should be advertised and marketed to potential investors looking to expand MR&O operations.

# Strategies

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1. Improve Internal and External Messaging
2. Increase Business Development Outreach
3. Align Education and Industry Partners
4. Develop Key Performance Indicators



## Strategies & Tactics

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To develop the strategies and tactics in this section, VisionFirst reviewed OCEDC's economic development activities to assess their effectiveness in aligning assets, talent, and resources in a manner that is competitive for jobs and investment in the target sector.

Combining facts and trends drawn from the data with economic development best practices, four strategies were identified for implementation. Within each strategy is a series of tactics that provide an approach to implementation.

For the purpose of the plan, the timeframes are defined as:

- **Short-Term:** Three Months to One Year
- **Mid-Term:** One Year to Three Years
- **Long-Term:** Three Years to Five Years

Understanding the numerous organizations involved in economic development, the tactics are segmented by:

**IMPLEMENT** – OCEDC to undertake, coordinate and implement directly.

**FACILITATE** – OCEDC to work in conjunction with partners to develop and implement.

**ADVOCATE** - OCEDC to advocate to municipalities, along with county, regional and state leaders to undertake and/or implement.



## Strategy One: Improve Internal and External Messaging

The Orange County community is fortunate to have a long history of successful economic development projects. OCEDC and its partners, roles and leaders have changed over the years, but the county and region continue to be known as a destination for large capital investments, particularly in the petroleum and petrochemical industries.

While the pandemic abruptly halted travel, location decisions continued, providing communities an unmatched opportunity to proactively reach out to site selectors and business decision-makers. As a result, many organizations have seen an increased project pipeline as companies look to mitigate the disruption of global supply chains. Companies will likely continue to evaluate existing locations while considering new projects that leverage competitive advantages.

Given this altered economic development landscape, organizations must improve and increase their marketing and communications to external customers. Equally important is OCEDC’s ability to continue to communicate messages of accountability, transparency and measured success to internal stakeholders.

Today, EDOs must appeal to a multitude of audiences, each looking for unique content that directly addresses their needs. Figure 22 provides an audience segmentation chart that will help OCEDC best communicate with its external and internal audiences.

**FIGURE 22: OCEDC AUDIENCE SEGMENTATION**

External Audiences	Internal Audiences
<ul style="list-style-type: none"> <li>- Executive-level Corporate C-Suite Decisionmakers (US &amp; International)</li> </ul>	<ul style="list-style-type: none"> <li>- Local Elected Officials</li> </ul>
<ul style="list-style-type: none"> <li>- Site Location Consultants</li> </ul>	<ul style="list-style-type: none"> <li>- Board Members</li> </ul>
<ul style="list-style-type: none"> <li>- Existing Industry</li> </ul>	<ul style="list-style-type: none"> <li>- Economic Development Partners (Economic Development &amp; State Partners: Inclusive of state economic development partners, workforce boards, state agencies and utility partners)</li> </ul>
<ul style="list-style-type: none"> <li>- Industry and Economic Development Media</li> </ul>	<ul style="list-style-type: none"> <li>- Community Organizations</li> </ul>
<ul style="list-style-type: none"> <li>- Companies engaged in International Trade</li> </ul>	<ul style="list-style-type: none"> <li>- Education &amp; Workforce Partners</li> </ul>
	<ul style="list-style-type: none"> <li>- Local Media</li> </ul>
	<ul style="list-style-type: none"> <li>- Taxpayers</li> </ul>

Compelling and meaningful messages are vital to successful economic development. OCEDC should use audience segmentation to determine what messages should be conveyed, to whom, and with what action as the goal. From there, key messages can be developed that will serve as the foundation for generating messaging and content.

The messages will be used in interviews, social media, presentations, web materials and other mediums. Developers, business owners and others want to be assured that their investment in



the region will have broad support among local leaders, residents and key partners, and consistent messaging offers that level of confidence.

### **What Is Important to Decisionmakers?**

In developing a tactical marketing and communications plan, it is critical to understand what target audiences want and help them obtain the information they are looking for in the location they are looking for it. In 2020, Development Counsellors International (DCI) published their *Winning Strategies in Economic Development Marketing* report, which asked corporate executives and location advisors for the most effective strategies and techniques in economic development marketing.

One significant finding from the report is that certain location types are at a disadvantage, at least in the short term, as DCI found that COVID-19 is impacting how location decisions are being made. The survey posed the following question: “Thinking about the impact of COVID-19 on corporate location decisions, how has your perception of the following location types as a business location been impacted?” Nearly 50 percent of respondents indicated that “large urban areas (cities with populations of more than one million)” are now less attractive as business locations.

Several other findings as it relates to how the region markets itself are worth noting:

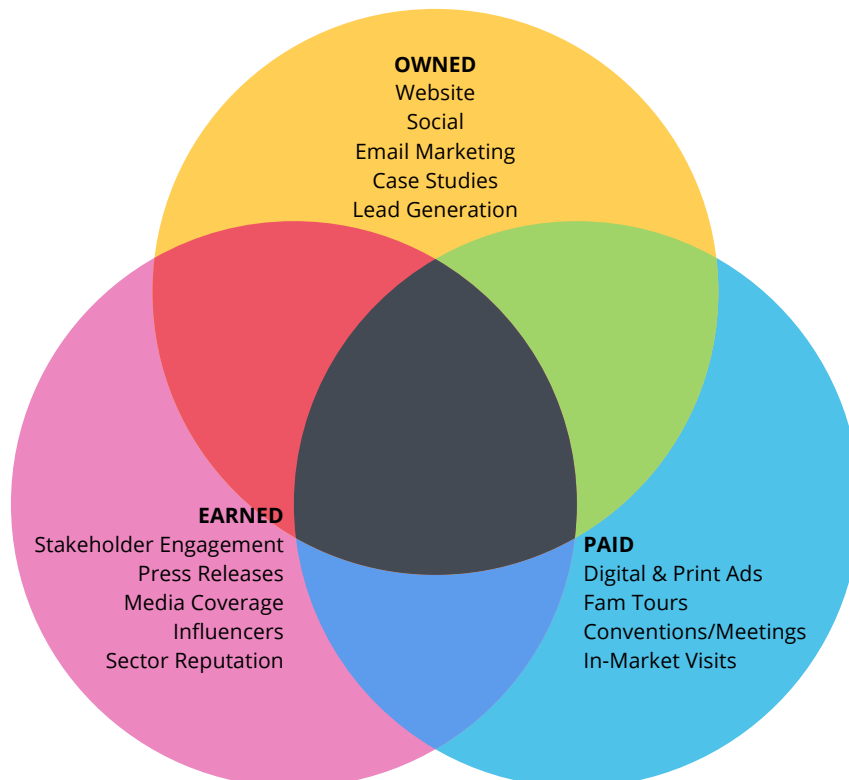
- Since 1996, dialogue with industry peers has been the top source of information about a location, followed by business travel and articles in newspapers and magazines.
- Since 2014, an internet/website presence has been rated as the most effective marketing technique, followed by planned visits to corporate executives, media relations/publicity, and hosting special events.
- 80 percent of respondents used the internet during their last site-selection search, and 77 percent reported a strong likelihood that they would visit an EDO’s website during their next site search.
- Location advisors said staff contact information and incentive information are the most useful features of an EDO’s website.

## Marketing and Communications Outcomes and Channels

To successfully implement the tactics outlined and reach decision-makers, OCEDC should strive to achieve the following outcomes with its marketing and communications initiatives.

- **Awareness:** Increase awareness of each of the counties and the region overall along with its competitive advantages, existing industry strengths, the diversity of its communities, and the willingness of its partners to help companies succeed.
- **Reputation:** Enhance the region’s reputation among site selectors, commercial real estate developers, companies, entrepreneurs and existing employers, as well as national and international media, as a region that offers a business-friendly environment in which companies and their employees will succeed. Highlight strategies undertaken during COVID to keep businesses open, retain talent and build resiliency.
- **Engagement:** Support the efforts of regional partners and continue to engage state and community leaders as well as potential investors in the region’s economic development efforts.
- **Recruitment:** Proactively recruit and retain business in the region. Leverage the support of regional partner organizations to position for an increase in the project pipeline and wins, with an emphasis on focus areas outlined in the strategic plan.

To realize these goals, OCEDC should utilize a suite of marketing and communications channels. The channels are broken down into three categories: owned, earned and paid.



**Tactic: Implement Strategic Messaging Across Platforms** *(Implement, Short-term)*

Economic development marketing is a long-term, ongoing proposition. Therefore, it is critical to effectively communicate what advantages each county and the region have to offer a business and, when appropriate, high-level talent.

Clear, well-constructed messages help people break through information overload and choose among many different sources of information. The goal of the messaging points is to shape opinion and motivate behavior. It is based on three principles of effective communication and persuasion:

- Opinion is often shaped by a relatively small number of opinion leaders – those who are knowledgeable, influential and articulate.
- A message is more believable if the source is credible. The economic development staff and community must deliver the narrative honestly, clearly and from a position of expertise.
- Messages are most persuasive when they are simple, relevant, consistent, aligned with the audiences' needs, concerns and interests and repeated over time using multiple means of delivery.

The primary focus of a tactical marketing and communications strategy is lead generation and awareness building. The county and region have achieved a host of successes this past year. The combination of strong economic developers, proactive workforce and education partners, and forward-thinking infrastructure projects has increased the community's marketability.

With that in mind, efforts have been aimed at communicating specific messages to target audiences.

- **Businesses know:** OCEDC understands and responds to their rapidly changing industry needs and leverages regional partnerships to increase success. The community demonstrated its capacity and business-friendly climate during COVID by ensuring businesses could stay open and locate needed talent.
- **Site selectors know:** The community and region bring together numerous partners to help companies mitigate risk, identify and employ a skilled workforce and leverage resources for bottom-line benefits.
- **Policymakers and legislators know:** OCEDC and its partners are collaborating and diversifying the economy by promoting the community and regional assets to national and global audiences.
- **Community leaders know:** What is happening in economic development at the local, regional, state, and utility levels and know how to promote it.

## Targeted External Stakeholders

**Executive-Level Decision-makers (U.S. and International):** Ultimately, business location decisions are made by top-level executives in a firm. Ensuring that C-level decision-makers in the key industries are aware of the region and understand the area's and the state's value propositions will be an important factor in influencing the perceptions of those considering relocation or expansion.

**Site Location Consultants:** Site location consultants often assist large firms in major location projects. They are an influential group that can bring multiple significant projects to the state over time. Building a solid relationship with this group and ensuring they are aware of the region's business and industry advantages is paramount to success. The objective is to create relationships that keep the area front of mind and generate opportunities for the development to be a part of the competition as project opportunities arise.

**Industry and Economic Development Media:** Informing and engaging national and international industry and economic development media about the community and the region's benefits within Texas is a cost-effective method of getting key marketing messages out to large, targeted audiences. Ensuring coastal Texas and Orange County is positioned positively in national and international markets, industry, site selection, and in-state media will positively influence business perceptions.

**Government Officials:** Government leaders can play a role in creating a business-friendly environment through regulations and policymaking as well as by providing investments in communities for infrastructure, logistics, workforce, and other priorities.

**Existing Industry:** Existing industry is critical in creating and maintaining a diverse economy. Existing industry is often a larger creator of new jobs and capital investment than new projects.

## Targeted Internal Stakeholders

**Government Officials:** Although government leaders are external stakeholders, they are also an internal audience to the organization's funding use and effectiveness measurements. OCEDC should ensure leaders are aware of the many activities being undertaken that support job creation and capital investment as well as how pro-business policies influence location decisions.

**Utilities:** Major utilities and local energy co-ops have a vested interest in economic development, and many provide economic development services and financial programs within their territories.

**Educational Entities:** The Orange County region has thirteen colleges and seven universities within the region. These are key partners in providing a skilled and trained workforce to targeted industries, and they need to be aware of industry labor needs.

**Civic organizations, nonprofits, and chambers of commerce:** These nonprofit organizations can help spread awareness of a shared message and goals. They have large reaches and can often influence the culture of a community. These organizations also serve as important funnels of information to talent.

**Small Businesses:** Small businesses are the backbone of many communities. Keeping them informed as to how proactive and competitive economic development efforts benefit their business, as well as ensuring they are aware of any programs or services that benefit them, is important.

**Residents:** Residents play an important role in supporting community efforts to attract new and expanding business and industry. By engaging this group, the organization can eliminate or lessen the risk of “NIMBY” mindsets and foster an environment conducive to economic growth and job creation.

**External**

WHAT DO WE WANT THEM TO THINK?	WHAT DO WE WANT THEM TO DO?
<ul style="list-style-type: none"> <li>OCEDC offers businesses competitive advantages in workforce and infrastructure assets</li> <li>The region’s strategic location provides upgraded infrastructure assets including deep-water ports, international and regional airports, Class 1 railways and interstate access.</li> <li>The region’s robust infrastructure network and skilled industrial workforce have drawn top tier companies in manufacturing and warehousing to locate in Orange County.</li> <li>Businesses can find the talent, infrastructure, regulatory environment and location to be successful in the region.</li> <li>Talent is skilled, reliable and growing with nine higher education institutions awarding more than 11,000 certificates and degrees annually within a 45-min drive time.</li> </ul>	<ul style="list-style-type: none"> <li>Contact OCEDC when they are considering an expansion, face challenges or have opportunities with their customers or supply chain.</li> <li>Share how the benefits of the region benefits for their business with corporate leadership, customers and suppliers.</li> <li>Consider the region as a top site due to its location, transportation infrastructure, workforce talent and business climate.</li> <li>Take advantage of the region’s ability to provide a location and expertise for a variety of projects.</li> <li>Consider OCEDC staff a repository of expertise, data and news for businesses looking to locate or expand.</li> <li>Be responsive to story ideas.</li> </ul>

**Internal**

WHAT DO WE WANT THEM TO THINK?	WHAT DO WE WANT THEM TO DO?
<ul style="list-style-type: none"> <li>The OCEDC region offers companies of all sizes bottom-line advantages for success.</li> <li>OCEDC, along with educational and utility partners, will continue to aggressively pursue high-wage jobs and capital</li> </ul>	<ul style="list-style-type: none"> <li>Carry key messages about the region and its competitive advantages to constituencies.</li> <li>Refer prospective business leaders to OCEDC for resources.</li> <li>Provide fair coverage.</li> </ul>

<p>investment to grow the economic vitality of the region.</p> <ul style="list-style-type: none"> <li>• Attracting manufacturing and logistic businesses to the region would create jobs, increase wages and tax revenues and benefit the region's local economy.</li> <li>• Site readiness is designed to increase and attract project activity to the region.</li> <li>• Companies in manufacturing and logistics have recognized the regional assets.</li> </ul>	<ul style="list-style-type: none"> <li>• Be responsive to story ideas.</li> <li>• Look to OCEDC as an entity that supports industry of all sizes and growing the economy.</li> <li>• Consider OCEDC staff experts on economic development.</li> <li>• Be proud of the regional industry portfolio and supportive of new growth.</li> <li>• Consider OCEDC a repository of expertise and a resource for businesses.</li> </ul>
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## Strategy Two: Increase Business Development Outreach

As the lead agency for economic development activities in Orange County, OCEDC oversees the attraction and retention of new business investments as well as the retention and expansion of existing businesses. This is accomplished through the creation of a competitive business environment. OCEDC’s strategies should include:

- Hosting and attending relationship-building events that target key audiences to expand county and regional awareness and create opportunities to compete.
- Utilizing quality research and sales materials to support business development and trade opportunities.
- Using social and digital media to develop and promote top-line messages that communicate the competitive advantages of Orange County and the region as well as the available properties that can be customized for each of the target audiences.
- Continuing to enhance the website to proactively promote initiatives and increase knowledge of the county, region, available properties, and the existing and emerging Logistics workforce available.
- Engaging stakeholders, board members and partners (grasstops outreach) in the region and expanding message repetition—specifically related to available properties and talent projects.

The following personal and digital outreach methods should be used to accomplish these strategies:

- Stakeholder and investor outreach
- Site visits, conferences, and events
- Media relations
- Website enhancement and optimization
- Digital and social media
- Email engagement

The following table represents ideas for outreach tools that will support key messages, strategies, and tactics. These can be undertaken by OCEDC directly as well as in partnership with regional partners. This is not a comprehensive list, and items are not necessarily listed in the order they might be implemented.

TACTIC	DESCRIPTION
<b>Messaging &amp; Outreach</b>	<ul style="list-style-type: none"> <li>• Compelling and meaningful messages are vital to successful economic development. The messages should be used in interviews, digital media, presentations, web materials and other media.</li> <li>• Site selectors, C-level executives, and others want to be assured that their investment in the county will have broad support from local</li> </ul>

	<p>leaders, residents, and key partners. Consistent messaging can offer that confidence.</p> <ul style="list-style-type: none"> <li>• <b>Audience:</b> All</li> <li>• <b>Measurement:</b> Consistent use of messaging throughout all marketing and communications tools. Message repetition among key stakeholders.</li> </ul>
Top Line Talking Points	<ul style="list-style-type: none"> <li>• The assets and benefits of the county.</li> <li>• Regional benefits such as the available property, an experienced Logistics workforce and the pro-business climate.</li> </ul>
Leveraging Testimonials	<ul style="list-style-type: none"> <li>• Testimonials tell the story of why the county and the region are attractive to business using assets such as its workforce, site development, and bottom-line benefits.</li> </ul>
Presentations	<ul style="list-style-type: none"> <li>• Virtual technology and virtual presentations bring a level of sophistication for EDOs. Organizations can project an image to prospects and clients that best illustrates its assets, resources and vision for growth. Through the creative use of technology, an understanding of data, and a clear articulation of the county's and the metro's business benefits, OCEDC and its partners can position and communicate the value proposition to each key audience.</li> <li>• Develop a non-linear presentation that responds to the audience's needs. A non-linear presentation does not necessarily start with the first slide and proceed sequentially. The slides will be structured similar to a website, enabling the presenter to respond to their audience's area of interest by clicking on a topic that is hyperlinked.</li> <li>• <i>Asset to Use: PowerPoint Deck</i></li> </ul>
Grasstops Outreach	<ul style="list-style-type: none"> <li>• Local officials and stakeholders are partners in OCEDC's success. Provide messaging for these leaders to convey to their sphere of influence.</li> <li>• High-level talking points about economic development and the area assets for Logistics, Warehousing and Distribution companies.</li> <li>• Key accomplishments and success stories.</li> <li>• Important metrics.</li> <li>• <i>Assets to Use: Site Flyer, Pocket Card, PowerPoint Decks, Case Studies</i></li> </ul>
Board Meetings	<ul style="list-style-type: none"> <li>• Use board meetings to strengthen board members into surrogates with key audiences.</li> <li>• Ensure materials presented at board meetings are also available online to the media and the public.</li> <li>• <i>Assets to Use: Pocket Card, PowerPoint Decks, Site Brochure, Videos</i></li> </ul>
Legislative Session & Activities with Delegation	<ul style="list-style-type: none"> <li>• Talking points and/or presentations targeted specifically at legislators who can help support messages about the county's competitiveness and how investments in the community have enabled the county to win competitive projects.</li> <li>• Leverage local success stories.</li> </ul>



	<ul style="list-style-type: none"> <li>• <i>Assets to Use: Pocket Card, PowerPoint Slides, Site Brochure, Case Studies, Videos</i></li> </ul>
<b>Site Visits, Conferences &amp; Events</b>	<ul style="list-style-type: none"> <li>• As in-person events resume, attend industry conferences and events to inform decisionmakers about sites and the due diligence already conducted.</li> </ul>
Market Intelligence	<ul style="list-style-type: none"> <li>• OCEDC has collected a wide variety of market intelligence and information. These reports should be strategically analyzed to detect business opportunities. OCEDC should use that intelligence to determine which events and conferences to attend.</li> </ul>
<b>In-Bound Site Visits</b>	<ul style="list-style-type: none"> <li>• Partner to host in-bound regional events for key site selectors. Consider site selectors who worked on projects for which the county was considered but did not win.</li> <li>• <i>Assets to Use: PowerPoint Decks, Site Brochure, Videos</i></li> </ul>
<b>In-Market Consultant &amp; C-Suite Meetings</b>	<ul style="list-style-type: none"> <li>• Host in-market, invitation-only events on the region and the benefits of available properties and its existing infrastructure with site consultants and corporate executives in key cities throughout the U.S.</li> <li>• <i>Assets to Use: PowerPoint Decks, Site Brochure, Case Studies, Videos</i></li> </ul>
<b>Conferences &amp; Events</b>	<ul style="list-style-type: none"> <li>• OCEDC promotes the county and generates leads by attending key industry trade shows and meetings with companies from those industries. Select events may provide promotional opportunities.</li> <li>• <i>Assets to Use: Site Brochure, Case Studies, Videos</i></li> </ul>
<b>Virtual Presentations</b>	<ul style="list-style-type: none"> <li>• Virtual opportunities can be used to brief and familiarize companies and consultants virtually. Use videos and slides to market the county and region by participating in / hosting webinars and online events.</li> <li>• <i>Assets to Use: PowerPoint Decks, Videos</i></li> </ul>
<b>Media Relations</b>	<ul style="list-style-type: none"> <li>• Promote the successes of OCEDC – investments and announcements.</li> <li>• Use press releases, fact sheets and testimonials to expand coverage.</li> </ul>
<b>Proactive Media Angles</b>	<ul style="list-style-type: none"> <li>• Identify stories and issue releases at least quarterly.</li> <li>• Consider using existing industry partners for stories.</li> <li>• Consider using board members and other community leaders to support OCEDC and recent successes.</li> <li>• Drive media to the newsroom for facts, reports and story ideas.</li> <li>• <i>Assets to Use: Photos, Videos, Graphics, Case Studies, Messaging</i></li> </ul>
<b>Website Enhancement</b>	<ul style="list-style-type: none"> <li>• EDO websites serve as the foundation for virtual marketing efforts. Given the focus on a community's or region's online presence, OCEDC should implement several tactics to improve the user experience on the site. <ul style="list-style-type: none"> <li>○ Enrich data available on the site with narratives that highlight the region's competitiveness.</li> <li>○ Build out the Sites and Buildings section on the website rather than taking visitors to the Entergy site.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Build out target industry information to highlight assets and data.</li> </ul>
<p><b>Search Engine Optimization</b></p>	<ul style="list-style-type: none"> <li>• Google’s Webmaster Guidelines suggests making pages primarily for users, not for search engines. That includes consideration on how pages of your website might appear in Google and other search engines. Most search results are made up of just three things: a title, a URL, and a description. <ul style="list-style-type: none"> <li>• A proper title tells visitors exactly what the page is about.</li> <li>• A good URL informs visitors about the structure and organization of the site as it relates to the page itself.</li> <li>• A thoughtful description gives visitors just enough information to assure them that the page has what they are looking for.</li> </ul> </li> <li>• Analytics should track metrics and capture a user’s device and browser type, location, and user path.</li> <li>• <b>Tactic:</b> Work with a web development company to create metadata that will help improve SEO for targeted audiences.</li> <li>• <b>Measurement:</b> New user sessions, time on site, pages, referral sources and bounce rate.</li> </ul>
<p><b>Digital &amp; Social Media</b></p>	<ul style="list-style-type: none"> <li>• There are several key components to an effective digital and social media approach that should be considered and utilized with all the activities listed below, including: <ul style="list-style-type: none"> <li>○ The communications efforts must be integrative, combining online strategies and traditional communications strategies (those listed in the previous section).</li> <li>○ The efforts must be targeted and efficient.</li> <li>○ No digital medium can stand alone. Combining them maximizes results.</li> <li>○ The efforts are acquisition focused to decision-making audiences and influencers.</li> <li>○ All marketing must be optimized for desktop and mobile devices.</li> <li>○ Marketing must contain staff contact information that is easy to find.</li> </ul> </li> <li>• <i>Assets to Use: Photos, Videos, Graphics, Messaging</i></li> </ul>
<p><b>Performance-Based Online Advertising &amp; Retargeting</b></p>	<ul style="list-style-type: none"> <li>• Content advertising is an extremely intent-driven medium reaching individuals at the moment of inquiry. Google offers several services based on content that can be used to promote OCEDC and its assets, all of which have an exceptional ability to target users based on behavior and demographics. Through Google, OCEDC can expect high click-through rates and quality clicks. The use of display banner advertising and retargeting in small campaigns to measure success should be considered.</li> <li>• <b>Audience:</b> Site selectors, C-Suite executives and decision-makers/influencers</li> <li>• <b>Measurement:</b> Reach and click-through rates</li> </ul>

<b>Search Engine Marketing/Paid Search</b>	<ul style="list-style-type: none"> <li>• Paid search ads appear adjacent to Google results when users search for relevant keywords or topics. Cost is determined based on a bidding process. Search ads let you determine your budget, keeping costs low. Results are used to determine success, and the campaign can be adjusted accordingly.</li> <li>• <b>Audience:</b> Site selectors, C-suite executives and decision-makers/influencers</li> <li>• <b>Measurement:</b> Reach and click-through rates, cost per click</li> </ul>
<b>Email Engagement</b>	<ul style="list-style-type: none"> <li>• Email marketing is a cost-effective medium for building relationships and maintaining regular contact with audiences, customers, and prospects. <b>OCEDC should launch a small email marketing campaign that appeals to key audiences.</b> The newsletter should take advantage of industry trends and audience preferences. Given the number of emails sent to decision-makers, the content should be relevant to the specific audience, not broad-based messages for internal and external audiences.</li> <li>• <b>Audience:</b> Site selectors, C-Level decision-makers, influencers</li> <li>• <b>Measurement:</b> Open rates and click-throughs should be at or higher than industry averages (20 percent open rate and 2 percent click-through rate)</li> <li>• <i>Assets to Use: Photos, Videos, Graphics, Case Studies, Messaging</i></li> </ul>
<b>Targeted and Content-Rich Email Blasts</b>	<ul style="list-style-type: none"> <li>• Identify a targeted audience for limited email outreach (100–250 members).</li> <li>• Develop a schedule and ideas for emails that communicate the benefits of locating in Orange County and of locating at any of the available properties.</li> <li>• Determine frequency and timing and be consistent in delivery.</li> <li>• Optimize content for mobile viewing.</li> </ul>

**Tactic: Enhance Website & Online Presence** *(Implement, Short-Term & Ongoing)*

Potential economic development projects often begin with the consideration of states and defined geographic regions (e.g., metros, electric utility service territories). Rarely, does a prospect, company or site selector have a specific community in mind. Communities can, however, increase their visibility through a strong online presence.

By enhancing Orange County’s online presence, the community can expand its reach and share competitive regional advantages and sites with interested investors. Economic development websites most valued by site selectors and business decision-makers:

- understand their audiences and speak to them in their own language;
- are heavy on bulleted facts and light on filler;
- provide relevant data in formats that users can download and manipulate;
- are fast, easy to find, and easy to use;

- have the right content, organized in a way that makes sense;
- are current, visually attractive, and regularly updated;
- use photos and infographics to highlight key pieces of information; and
- make the organization's contact information clear and accessible.

Using the eight elements outlined above, OCEDC has opportunities to make improvements on [orangecountyedc.com](http://orangecountyedc.com).

- **Maps:** While the [homepage](#) showcases a close-up regional map, OCEDC should consider how foreign direct investment companies and those unfamiliar with the area would be able to understand the location. The [interactive maps page](#) features the community's location within the state, the southeast, and the nation, yet does not clearly demonstrate competitive advantages via text or infographics. Consider highlighting the Neon Cloud production [video](#) on Orange County, which highlights logistical advantages and outlines what makes the community unique and how it is welcoming to business. *Note: OCEDC's Interstate 10 Project Tracker link is broken and should be updated to this active link: [apps3.txdot.gov/apps-cq/project\\_tracker/](https://apps3.txdot.gov/apps-cq/project_tracker/).*
- **Competitive Advantages:** OCEDC does well at demonstrating competitive advantages for target industries and the region's education and training resources, as indicated on the [Workforce page](#), but it is difficult for the viewer to find OCEDC's target industries using the current dropdowns. Zoomprospector.com offers an up-to-date [community profile](#) on the website, but it does not highlight Orange County's regional workforce and amenities and it relies on the audience to interpret data into their own narrative. Providing synthesized data and emphasizing competitive advantages for target industries gives a clearer direction for potential prospects to learn more about the region and its assets.
- **Regional Data:** Using data from earlier in this report, highlight strong metrics as compared to the state or nation using simple infographics and short narratives.
- **Incentives:** While OCEDC's website offers detailed information on local and state incentives, consider adding information on Entergy's incentives or rate riders.
- **Workforce:** While communities have improved in featuring workforce on their websites, they often have only a basic list of demographic information and educational institutions. In a hypercompetitive market, organizations must highlight what business decision-makers cannot find through online databases. Websites, including partner websites, should demonstrate partnerships with educational, workforce, and industry partners. Give specific examples and timelines of how success was achieved and consider highlighting various degrees and certificate programs within target industries. Each target industry page should also feature relevant workforce and education statistics.
- **Case Studies and Testimonials:** Demonstrating success from a company perspective helps differentiate a community. Success stories need to be told throughout the website and throughout the entire year, not saved for annual reports. Testimonials should help a company understand the community behind the numbers. Include testimonials from

business owners of all sizes on why they choose to live and work in the county or region. Feature professionals who are passionate about the region and the type of industry thriving there. Use sidebars or callout boxes, with infographics and statistics, to generate more visual interest. For best practices, consider [Amatrol.com](http://Amatrol.com), an interactive training tool for industry and education partners. It highlights a variety of its programs in an easy and effective manner and provides video clips from a variety of perspectives.

- **Newsroom:** Create a newsroom that features case studies, fact sheets, bios, and presentations. Rather than taking people away from the site to either a partner site or a PDF, post press releases directly on the site. Consider including the following in a newsroom:
  - Press releases
  - Hot topics, including fact sheets on projects, state or regional rankings, and releases from partners
  - Success stories or case studies
  - Multimedia, including videos, photos and interviews
  - Contact information
  - A search function by date, subject, and content type
- **Contact Information and a Call to Action:** Every page on a site should have a contact with a photo and a direct phone number and email address. Include a call to action on each page to help the site locator or decision-maker understand what to do next.

**Tactic: Utilize Existing Industry Program to Drive Business Development, Expansion and Retention.** *(Implement, Ongoing)*

Maintaining healthy relationships with existing industries is key to the organization's development of a favorable business environment. **OCEDC's Existing Industry Program can be capitalized on through yearly visits (in-person or virtual) to gather information about existing industries' current and future needs.** Closures can often be avoided or minimized if the organization is made aware of problems or concerns within a sufficient time frame—the earlier, the better. Using a customer relationship management (CRM) tool enables OCEDC staff to track industry visits, record data and conversations and document follow-up activity.

Industries can aid in economic development by sharing valuable insight about their business practices, especially information related to expansions and supply chain prospects. This information can help the organization develop a calculated approach to building industry clusters by creating a gravitational field that attracts new industries that are complementary to existing industries in the region. Industries can also often shine light on challenges that other local industries are experiencing, enabling OCEDC to troubleshoot and quickly address those difficulties. Finally, a well-planned and well-executed existing industry program provides valuable feedback on how the industries view OCEDC's services.

**Tactic: Enhance Technology to Highlight Assets** *(Implement, Mid-Term)*

Pre-pandemic, having an online presence and ample marketing collateral to connect with customers was considered a competitive advantage. Today, online databases and marketing materials are vital for promoting industrial products and assets within a community, MSA, or utility service region. Ultimately, they are necessary to increase a community's credibility and its chances of competing for competitive projects.

Technology has made it easier for communities to project an image to prospects and clients that best illustrates its assets, resources, and vision for growth. Through the creative use of technology, an understanding of data, and a clear articulation of the area's business benefits, OCEDC can position and communicate the community and region's value proposition to each of its key audiences locally, statewide, domestically, and globally.

Tools such as **interactive maps, digital presentations, interactive drone footage, overlays in Google Earth** (KMZ files), and other tools, partnered with clearly defined competitive advantages, including key messaging and benefits of business growth for the region, are needed to properly present the product offerings.

While drone videos and photography are an effective marketing tool, **enhancing drone site footage or photography by creating 360° interactive photos** for sites and buildings increases engagement by prospective clients. [Kuula.co](https://kuula.co) is an easy-to-use and budget-friendly solution for creating 360° virtual tours and sharing them on the web.

**Tactic: Increase Positioning for Top Sites and Buildings** *(Implement, Mid-Term)*

Even before the pandemic, initial site selection research was conducted online by evaluating workforce demographics, incentives, and sites and buildings. Many EDOs use sites and buildings databases to showcase properties, but contrary to the quickness with which a site selector needs to narrow down locations, these tools can be overwhelming, cumbersome, and unusable on mobile devices. Positioning the best sites for increased visibility and consideration is critical in today's marketplace.

In addition, the topic of finding truly ready sites has become an industrywide conversation. Consider this excerpt from a [recent publication](#) by Area Development magazine:

*Across the nation, finding well-positioned, developable land with utilities and infrastructure has become almost impossible in some areas. Just about all of it has been scooped up by hungry buyers. Competition for land zoned for industrial/warehouse development is particularly intense.*

*Considerations for greenfield acquisition are quite different than improved land. Notably, buyers must factor in additional risk related to timing and cost of utilities and infrastructure. Timing adds a lot of risk because no one knows what the market will be like by the time the land is ready for vertical development.*

As noted in the product review, Orange County has several sites that should be marketed consistently as they offer low risk and short development timelines.

Given the market for and the desirability of finding ready sites, **OCEDC should improve online marketing and promotion of its top sites on its website, demonstrating competitive advantages and due diligence performed.**

OCEDC should consider three initiatives to improve site marketability to target audiences:

- Develop a target industries page that highlights the top properties for each industry.
- Improve site overviews by demonstrating due diligence, timelines, and associated incentives.
- Highlight Entergy site videos on the website in addition to the site and building database.
  - [Orange Crossing Industrial Park](#) (3,600 acres)
  - [Falcon Cove](#) (2,150 acres)

**Tactic: Highlight Occupations with Transferable Skill Sets or Extended Employment**  
*(Implement, Mid-term)*

To be considered extended employment, regional workers must meet three criteria: be employed, have similar skills to the specified occupation (though may need additional training and/or certification to meet the specified occupation's requirements) and have current wages that are no more than 10 percent higher than average wages of the specified occupation.

For a best practice, consider the Yokohama Tire manufacturing plant, located in West Point, Mississippi, which required a workforce of 2,000 employees over a four-phase build out. West Point had lost Bryan Foods eight years earlier, which raised the county's unemployment rate to the second highest in the state. Part of the pitch for the workforce focused on the transferable skill sets from food processing to tire manufacturing.

**Tactic: Create an Annual Event Listing** *(Implement, Short-Term and Ongoing)*

Economic development success is built on relationships. As in-person events resume, it is important for OCEDC and key stakeholders to participate in conferences, events, inbound site visits, and in-market visits. Below is a high-level listing of events for consideration. Inbound Logistics also provides a 2022 list of [logistics and supply chain events](#).

Date	Event	Location	Tools
	Online Campaign Roll-Out		
2022	<a href="#">Economix - Consultant Connect</a>	Columbus, Ohio	
	Consultant Connect Small Group Event		
	<a href="#">NextGen Talks</a>		
August 1-3, 2022	<a href="#">Logistics Development Forum</a>	Beaver Creek, Colorado	
	FDI Events		
	Area Development Trips		

	In Market Corporate HQ Visits		
	Site Selectors Guild Events		
	Industrial Asset Management Council (IAMC) Events		
<b>June 26-29, 2022</b>	<a href="#">SelectUSA Investment Summit</a>	National Harbor, Maryland	

For each of these, OCEDC should utilize its marketing toolkit of:

- Property overview brochure
- Industry specific case studies
- Targeted industry fact sheets
- Marketing videos and drone footage
- Social media graphics
- Pocket card with top messaging
- PowerPoint decks

### Strategy Three: **Align Education & Industry Partners**

Workforce and talent development has always been a major component of economic development activities. Can a community demonstrate an available, skilled and reliable workforce? Are the training programs and partners in place to support additional skill development? Is the local education system, public and private, graduating students in career and technical education programs to serve employer needs?

Each of these questions existed on project requests for information well before COVID and even before the Great Recession. The pandemic underscored the need for collaboration, critical thinking and a keen understanding of the motivating factors of the local workforce.

Students are searching for programming that will make them employable, while employers are looking for a workforce that can meet their specific needs. To create a more seamless pathway for students to enter or re-enter the workforce and stay there, educational institutions must establish a close-knit relationship with industry partners. Ongoing communication is critical to working collaboratively and helps to ensure institutions can create tailored programming for industry, while developing job-ready graduates.

Workforce and talent development is usually discussed in general terms of aligning target industries to career programs and subsequent employment and retention numbers. The pandemic added to that information by providing more charts and data points for communities and leaders to follow, such as job openings versus unemployment or labor force participation dips versus federal aid programs.

The following section provides high-level numbers on the state of the workforce in Orange County and the region, comparing job openings with the unemployment rate to determine the surplus or deficit of jobs in the region.



**FIGURE 23: DECEMBER 2020 REAL-TIME JOB OPENINGS DATA – ORANGE COUNTY**

Sector	Total Job Posts	Occupations	Locations	Employers	Certifications	Hard Skills	Soft Skills	Job Titles	Programs
All Job Postings	4,591	329	195	1,100	86	568	93	2,500	95
Transportation & Material Occupations (53-0000), Transportation Inspectors (53-6050), Transportation, Storage, & Distribution Managers (11-3070) Job Postings	645	21	73	266	12	94	56	373	13

Source: JobsEQ®. Online job post numbers are from the Real-Time Intelligence (RTI) data set, produced by Chmura and drawn from forty thousand websites. Data is updated daily, and all ad counts represent deduplicated figures.

**FIGURE 24: DECEMBER 2020 REAL-TIME JOB OPENINGS DATA – 45-MINUTE DRIVE TIME**

Sector	Total Job Posts	Occupations	Locations	Employers	Certifications	Hard Skills	Soft Skills	Job Titles	Programs
All Job Postings	72,630	750	2,300	9,100	450	1,600	180	31,500	340
Transportation & Material Occupations (53-0000), Transportation Inspectors (53-6050), Transportation, Storage, & Distribution Managers (11-3070) Job Postings	9,609	52	877	2,000	27	373	90	3,600	37

Source: JobsEQ®. Online job post numbers are from the Real-Time Intelligence (RTI) data set, produced by Chmura and drawn from forty thousand websites. Data is updated daily, and all ad counts represent deduplicated figures.

Figure 24 displays unemployment numbers since before the pandemic. The low of 4.6 percent was recorded in November 2019. October 2021, the most recent data available, is the lowest recorded unemployment rate since then.

**FIGURE 25: UNEMPLOYMENT RATE SNAPSHOT – 45-MINUTE DRIVE TIME**

Month	Rate	Month	Rate
January 2019	5.1%	June 2020	12.8%
February 2019	5.0%	July 2020	12.3%
March 2019	4.9%	August 2020	11.3%
April 2019	4.8%	September 2020	10.5%
May 2019	4.7%	October 2020	10.1%
June 2019	4.7%	November 2020	10.0%
July 2019	4.8%	December 2020	10.0%
August 2019	4.9%	January 2021	10.0%
September 2019	4.9%	February 2021	9.9%
October 2019	4.8%	March 2021	9.7%

November 2019	4.6%	April 2021	9.4%
December 2019	4.8%	May 2021	8.9%
January 2020	5.8%	June 2021	8.3%
February 2020	7.5%	July 2021	7.8%
March 2020	9.6%	August 2021	7.4%
April 2020	11.4%	September 2021	7.0%
May 2020	12.6%	October 2021	6.7%

*Note: Seasonally adjusted.*

When the unemployment rate is converted into number of workers and compared to job openings, it creates a clearer picture of the workforce environment. Currently, there are about 72,500 openings in the region, while the number of unemployed and looking for work is 50,000. This indicates a surplus of approximately 22,500 job openings.

**Tactic: Coordinate with Existing Industry to Identify and Influence Skill Development**  
*(Facilitate, Short-Term)*

**OCEDC should survey existing employers on skill and occupation gaps as well as projections regarding the impacts of automation and disruption.** The data and feedback should then be shared with education and training providers.

Many employees do not pursue additional education or training due to the opportunity cost of leaving their current employment. To increase accessibility, **OCEDC should explore the need for free training programs that do not impact a person's current work schedule.**

For a best practice, consider ST Engineering. At its maintenance, repair, and overhaul (MRO) facility in Pensacola, Florida, ST Engineering offers trainings including the Airman Trainee Program, Structures and Interior Internships, and the Military Fast Track program. Each program aims to develop a pipeline of talent to support the aviation sector and its facility. Those who participate in the programs can receive paid on-the-job training alongside classroom lessons. The training program provides a head start for those interested in an aviation maintenance career.

This type of programming should be coordinated in conjunction with the region's community colleges and promoted in the early high school years so students are aware of the various local career pathways. OCEDC should also advocate for increased promotion of programs to ensure underserved populations are aware of opportunities and support services.

**Tactic: Grow the Labor Force Using Untapped Talent** *(Advocate, Mid-Term)*

Currently, women comprise about 45 percent of the total labor force within a forty-five-minute drive time of Orange County, but only account for 16.5 percent of the

Transportation, Distribution, and Logistics workforce. **OCEDC should spearhead an effort that leverages this intellectual capital into a campaign that celebrates and encourages women to pursue a Transportation, Distribution, and Logistics career.**

For a best practice, consider [West Virginia Women Work](#), which was founded to help women train and secure employment in nontraditional occupations, especially the skilled trades. The program boasts an 80 percent job placement rate, with new graduates earning a minimum of \$3 more per hour than a traditional job.

The Orange County region is also home to nearly 23,000 veterans (ages 18–62). The military offers veterans hard skills that can be difficult to obtain in the civilian workforce, especially in the current market. Veterans often find work in Construction because of their teamwork and fitness qualities, as well as Manufacturing due to their experience working on equipment or vehicle repair. Truck Driving and Transportation occupations are also common occupations for veterans, as many ex-military personnel have experience working long or odd hours and are capable of the stamina required to endure those hours.

A 2019 Pew Research Center [survey](#), however, found that 45 percent of veterans say that “the military prepared them ‘not well at all’ or ‘not too well’ for the transition to civilian life.” Given that data indicates that there is a strong need for veterans in the civilian workforce, as many have in-demand skills and experience, **OCEDC should educate veterans on in-demand workforce opportunities with industries.**

**OCEDC should also facilitate job opportunities for people with disabilities.** The labor force participation rate of people with disabilities is 13 percent. Companies have created partnerships with state organizations to identify successful recruiting tactics that create a more inclusive workforce while leveraging an untapped portion of the population. Working with local workforce partners, OCEDC should work with the [Texas Workforce Solutions – Vocational Rehabilitation Services](#) to customize recruitment efforts for existing industries—creating a bridge between businesses and the disability communities.

For a best practice, consider Madison County Mississippi Economic Development Alliance, which connected existing industry Fastenal with the [Mississippi Department of Rehabilitation Services](#) (MDRS). MDRS is a state agency that provides resources to help Mississippians with disabilities find new careers, live more independently, overcome obstacles, and face new challenges. Through the Office of Business Development, MDRS recruited, referred, and pre-screened qualified applicants that could support Fastenal’s needs; the services were provided at no cost to the company.

The partnership promotes diversity in the workforce by recruiting and retaining individuals with disabilities while also filling an employers’ need for an expanded workforce. By

utilizing MDRS, Fastenal has been added nearly a dozen employees to their current workforce base. The MDRS employees have been an invaluable addition to the Madison County Fastenal facility, serving in picking and sorting positions as well as forklift operations. As a result, turnover rates are lower, productivity has increased, and some of the new employees have earned promotions.

**OCEDC should encourage regional participation in the [ACT Work Ready Communities Initiative](#) and highlight any current ACT-certified counties and ACT national career readiness certificates (ACT NCRC) in the region.** The NCRC is a nationally recognized credential that certifies that a recipient has the essential skills for workplace success. Many employers look for it from job applicants because it is viewed as a predictor of job performance.

**Tactic: Break Down Higher Education Barriers for Adult Learners** (*Advocate, Long-Term*)

Recent research estimates that 71 million Americans have the right skills for higher-wage jobs but are unable to enter those roles because they lack four-year degrees. In the U.S., individuals without a college degree are disproportionately African American and Hispanic. These demographics are also more likely to experience job loss from automation because they are disproportionately concentrated in support roles.

Competency-based and requiring less time and tuition than a conventional degree, credential courses aim to match skill development to evolving hiring needs. Credentials can also “stack” over time to earn degrees. This approach has the potential to be significantly more inclusive while broadening the talent pipeline.

Enrollment in short-term credential classes has increased 70 percent compared to the prior year, according to the [Business-Higher Education Forum](#). Providing credential courses online or on weekends and evenings can broaden access to underrepresented students who are balancing family obligations, are reskilling for a new career, or are veterans.

According to the American Council on Education, college students over the age of 25 are often overlooked in efforts to increase student success. Yet adult learners make up more than one-third of all undergraduate students, with Black or African American, Native Hawaiian or other Pacific Islander, and American Indian or Alaska Native undergraduate students enrolling at higher rates as adult learners than other ethnic groups.

These students tend to enroll part time (52.0 percent), and more than half (51.5 percent) attend public two-year institutions. Adult learners often maintain jobs as they complete coursework, with slightly less than half (44.0 percent) working full time and approximately one-fourth (24.3 percent) working part time.

Understanding that adult learners or nontraditional students have different needs and expectations and face different barriers to higher education access, **OCEDC should encourage local education institutions to implement programs and initiatives that encourage entry and college of completion by these students.** When provided both an education and a more varied job market upon graduation, they are less likely to leave the region for another market.

[EMSI](#) suggests the following five strategies for encouraging residents to enroll in education opportunities:

- Embed current, relevant career data directly on high-traffic platforms and webpages.
- Facilitate career exploration that connects future learners with academic programs.
- Help learners identify and fill their skill gaps.
- Highlight real employment outcomes of past students.
- Highlight the return on investment of a certificate or degree.

For a best practice, consider the [49er Finish Program](#) at the University of North Carolina, Charlotte. Housed within the Office of Adult Students and Evening Services (OASES), the program recruits former UNC Charlotte students to return to school, then supports them in achieving their academic goals. A central component of the program is personalized academic advising. The advisors are trained to assist adult and nontraditional students, and they work with each student to develop and implement individual plans for achieving their goals. The program focuses on completion, persistence, and retention by using tactics specific to adult learners such as wraparound services, counseling, and financial advising.

Throughout the stakeholder interviews, it was mentioned that the workforce is lacking in its understanding of job opportunities and career pathways. Although that may be true, employers and educators should also consider the underlying reasons. OCEDC should educate local and regional **higher education institutions to implement best practices that support adult learners** such as:

- supportive services, including childcare and transportation;
- professional networks and peer support;
- course time flexibility;
- financial aid and support offices with nontraditional hours so students with full-time jobs can receive assistance;
- a course in which students create a portfolio of prior experience and allows the student to earn credits to apply to their degree; and
- enlisting adult education recruiters to attend college fairs and reach parents who attend with their high schoolers.

## Strategy Four: Develop Key Performance Indicators

As discussed earlier, personal outreach is key. Many industry conferences and trade shows offer opportunities to promote the community to decision-makers. In addition to this type of outreach, OCEDC must target specific decision-makers focused on the Logistics, Warehousing and Distribution industry while highlighting local assets and attributes.

**OCEDC should develop a plan to attend professional association conferences targeting site selection consultants to develop relationships with decision-influencers.** If possible, OCEDC should join Texas' or Entergy's outreach efforts around in-market events.

### Metrics

- Develop a master list containing at least fifty global out-of-market decision-makers / decision-influencers consisting of site selection consultants and company officials (see appendix for top 50 largest logistics companies in North America).
- Utilize a marketing firm for the development of promotional material to target site selector list followed by handwritten correspondence introduction.
- In the first year, develop a personal relationship with five to ten site selectors or company representatives in the Logistics, Warehousing and Distribution sectors.
- Set specific lead generation goals; consider an increase of 10 percent over previous year's lead generation. This number should be those gained by OCEDC; consider a 10–15 percent increase inclusive of Texas and Entergy leads.
- Attend at least two site selection professional association conferences events annually (if available).
- Create and maintain at least two touchpoints annually with the decision-makers on the master list via calls, visits, and correspondence.

Given Orange County's large industrial investments, including Maintenance, Repairs, and Operations, Petrochemical, and Construction, one-on-one visits that include systematic information collection are a key component of any outreach program.

### **To begin industry outreach, OCEDC should ensure several key components are included:**

- Include both large private sector employers and small businesses in the program. A good cross-section that is representative of the community is imperative.
- Conduct one-on-one visits with each company, using a survey tool to focus on the needs of the business and its employees. Identify and address companies at risk and potential expansion opportunities.
- Analyze all data and develop action plans to define the priorities for the community as it relates to existing business. Allocate resources to address concerns.

- Follow up. Each meeting must be of consequence. Companies need to trust that the information they are sharing has a chance to make a lasting impact or they will stop sharing it.

### **Metrics**

- In the first year, perform twenty one-on-one consultations, to be conducted annually, with private sector businesses.

Consider the following parameters for selecting businesses to visit:

- Visits should include the top ten largest employers in the county (not in market-driven industries such as Retail, Health Care, or Accommodations).
- Visits should include businesses in the county's target sectors, with a special focus on Manufacturing and Warehousing.
- Businesses should have twenty-five or more employees.
- Consider companies with less than twenty-five employees if they are within a target industry and have demonstrated the ability to grow.

Consider the following recommendations for the consultations:

- Use visits to identify similar businesses such as suppliers, clients, or ancillary services that might present targets for cluster development.
- Engage and recruit private business leadership to serve on task forces or committees to enhance the competitive position of the county.
- Use survey information to build quantitative data to help with refining workforce and education programs that target the development of talent.



## Moving Forward



It is clear the pandemic has uncovered the vulnerabilities of the global supply chains – a challenge the logistics industry will continue to face moving into 2022. A high degree of flexibility between all parties in the supply chain will be needed and expected as companies are forced to rethink their approach to responding to the pandemic and moving into a post-COVID era.

For OCEDC to become more competitive in the growing logistics, distribution and warehousing market, the organization must:

- It is crucial to stay up-to date with current trends as logistics, distribution and warehouse subsectors are evolving and supply chains remain bottlenecked. Throughout this report, various articles and industry news sources are referenced that provide additional suggestions and recommendations for Orange County to utilize.
- Increase external messaging, making sure to keep online product information updated and accurate.
- Develop an action plan and with clearly identified timelines and cost associated with product development improvements for top competitive sites.
- Engage partners in a workforce development plan for training as companies begin to evaluate talent in the region.

In the words of Margaret Mead, “Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has.” The OCEDC team has clearly made a significant impact on the region’s competitiveness. To take that effort to the next level this plan attempts to lay out the groundwork for a collaborative approach to logistics, distribution and warehousing by optimizing the resources of the region. Continuing this approach is the key to the transformative growth the region so desires.



## 2021 Largest Logistics Companies in North America



[Transport Topics](#) provides a complete list of the top fifty logistics service companies in North America, including the **freight brokerage, dry storage warehousing, refrigerated warehousing, dedicated, ocean freight, and airfreight** subsectors.

**FIGURE 26: 2021 FINANCIAL AND OPERATING INFORMATION FOR THE FIFTY LARGEST LOGISTICS COMPANIES IN NORTH AMERICA**

2021 Rank	Company	Gross Rev. (millions)	Net Rev. (millions)	Employees
1	<a href="#">C.H. Robinson Worldwide</a>	15,490 est	2,241	9,114
2	<a href="#">XPO Logistics</a>	12,107 est	6,470 est	62,000
3	<a href="#">UPS Supply Chain Solutions</a>	11,048	5,565 est	77,000
4	<a href="#">Expeditors International of Washington</a>	10,116	2,927	17,908
5	<a href="#">J.B. Hunt Transport Services</a>	9,198	3,045 est	23,000
6	<a href="#">Kuehne + Nagel Americas</a>	6,615 est	1,656 est	15,000
7	<a href="#">DHL Supply Chain</a>	5,800	5,290 est	36,339
8	<a href="#">Transportation Insight Holding Co.</a>	4,270	280 est	1,800
9	<a href="#">Total Quality Logistics</a>	4,138	736	5,000
10	<a href="#">Burris Logistics</a>	4,100	435 est	2,109
11	<a href="#">Ryder Supply Chain Solutions</a>	3,774	2,800	15,000

12	<a href="#"><u>Hub Group</u></a>	3,646	449	5,000
13	<a href="#"><u>Transplace Inc.</u></a>	3,400 est	334 est	2,800
14	<a href="#"><u>DSV Panalpina</u></a>	2,970	730 est	-
15	<a href="#"><u>Schneider</u></a>	2,814	1,135 est	1,500
16	<a href="#"><u>Geodis (North America)</u></a>	2,700	1,600 est	17,337
17	<a href="#"><u>NFI</u></a>	2,631	2,214	14,500
18	<a href="#"><u>Penske Logistics</u></a>	2,600	2,040 est	20,033
19	<a href="#"><u>Echo Global Logistics</u></a>	2,512	393	2,593
20	<a href="#"><u>DB Schenker (North America)</u></a>	2,335 est	840 est	8,700
21	<a href="#"><u>Ingram Micro Commerce &amp; Lifecycle Services</u></a>	2,300	2,140 est	28,500
22	<a href="#"><u>Landstar System</u></a>	2,196 est	365 est	700
23	<a href="#"><u>MODE Transportation</u></a>	2,100	287	435
23	<a href="#"><u>FedEx Logistics</u></a>	2,100 est	1,075 est	20,000
25	<a href="#"><u>Americold Logistics</u></a>	1,990	1,580 est	16,000
26	<a href="#"><u>Ceva Logistics (North America)</u></a>	1,975 est	935 est	17,000
27	<a href="#"><u>GlobalTranz Enterprises</u></a>	1,651	263	1,152

28	<a href="#"><u>Worldwide Express</u></a>	1,650	360	2,000
29	<a href="#"><u>BDP International</u></a>	1,552 est	379 est	5,000
30	<a href="#"><u>Werner Logistics</u></a>	1,527	1,120	6,495
31	<a href="#"><u>Lineage Logistics</u></a>	1,440 est	1,440 est	14,000
32	<a href="#"><u>Knight-Swift Transportation</u></a>	1,330 est	665 est	20,000
33	<a href="#"><u>TransGroup Global Logistics</u></a>	1,300	580 est	1,740
34	<a href="#"><u>Ruan</u></a>	1,223	860	5,500
35	<a href="#"><u>AIT Worldwide Logistics</u></a>	1,220	256	1,719
36	<a href="#"><u>Syncreon Holdings</u></a>	1,203 est	1,080 est	-
37	<a href="#"><u>Radial</u></a>	1,200	1,200 est	4,600
38	<a href="#"><u>Universal Logistics Holdings</u></a>	1,190	550 est	7,550
39	<a href="#"><u>Capstone Logistics</u></a>	1,040 est	900 est	12,000
40	<a href="#"><u>Odyssey Logistics &amp; Technology</u></a>	1,018 est	365 est	2,600
41	<a href="#"><u>Uber Freight</u></a>	1,011	120 est	-
42	<a href="#"><u>APL Logistics (North America)</u></a>	1,010 est	625 est	4,000
43	<a href="#"><u>Ascent Global Logistics</u></a>	974	140	950

44	<a href="#"><u>Crane Worldwide Logistics</u></a>	916 est	267 est	1,800
45	<a href="#"><u>OIA Global</u></a>	876 est	164 est	1,300
46	<a href="#"><u>Pilot Freight Services</u></a>	874	250	2,500
47	<a href="#"><u>U.S. Xpress Enterprises</u></a>	857	609	3,895
48	<a href="#"><u>Cardinal Logistics</u></a>	849	752	4,250
49	<a href="#"><u>Radiant Logistics</u></a>	847	199	603
50	<a href="#"><u>Nippon Express (North America)</u></a>	844	300 est	2,931