



Industry Spotlight

Transportation and Warehousing

Fort Bend County, Texas



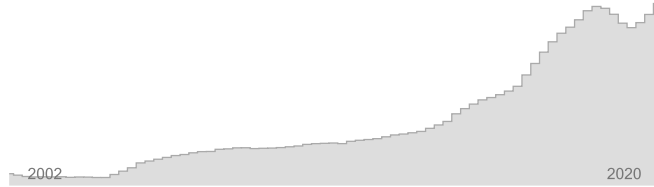
Greater Houston's Finest Address

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Spotlight Summary

Transportation and Warehousing
Fort Bend County, Texas – 2020Q3

EMPLOYMENT



7,272

Regional employment / 7,233,898 in the nation

7.4%

Avg Ann % Change Last 10 Years / +2.9% in the U.S.

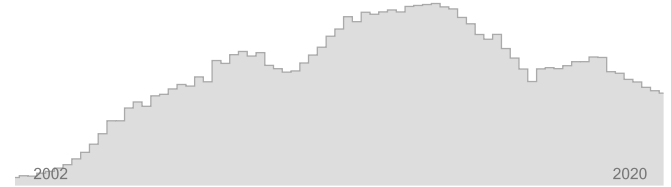


3.3%

% of Total Employment / 4.7% in the U.S.



WAGES



\$43,112

Avg Wages per Worker / \$53,874 in the nation

-0.8%

Avg Ann % Change Last 10 Years / +1.6% in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

7.3 %



Couriers and Express Delivery Services

23.4 %



Taxi and Limousine Service

2.3 %



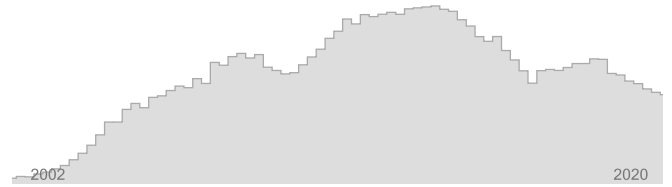
General Freight Trucking

Industry Snapshot

EMPLOYMENT



WAGES



| 4-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|--------------|-----------------|-------------|-------------|---------------|---------------------|
| Couriers and Express Delivery Services | 2,426 | \$36,741 | 2.06 | | 355 | 2.9% |
| Taxi and Limousine Service | 778 | \$9,576 | 1.50 | | 101 | 3.0% |
| General Freight Trucking | 739 | \$50,087 | 0.43 | | 85 | 1.0% |
| Warehousing and Storage | 666 | \$40,817 | 0.34 | | 99 | 2.9% |
| Postal Service | 589 | \$63,309 | 0.67 | | 50 | 1.0% |
| Freight Transportation Arrangement | 469 | \$50,921 | 1.27 | | 56 | 2.2% |
| Local Messengers and Local Delivery | 365 | \$37,483 | 1.56 | | 53 | 4.3% |
| Specialized Freight Trucking | 331 | \$69,185 | 0.50 | | 42 | 2.1% |
| Rail Transportation | 159 | \$93,191 | 0.71 | | 18 | 1.8% |
| Support Activities for Air Transportation | 119 | \$56,755 | 0.31 | | 15 | 2.6% |
| Remaining Component Industries | 632 | \$52,869 | 0.41 | | 83 | 2.3% |
| Transportation and Warehousing | 7,272 | \$43,112 | 0.70 | | 962 | 2.5% |

💡 Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

💡 Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

Staffing Pattern



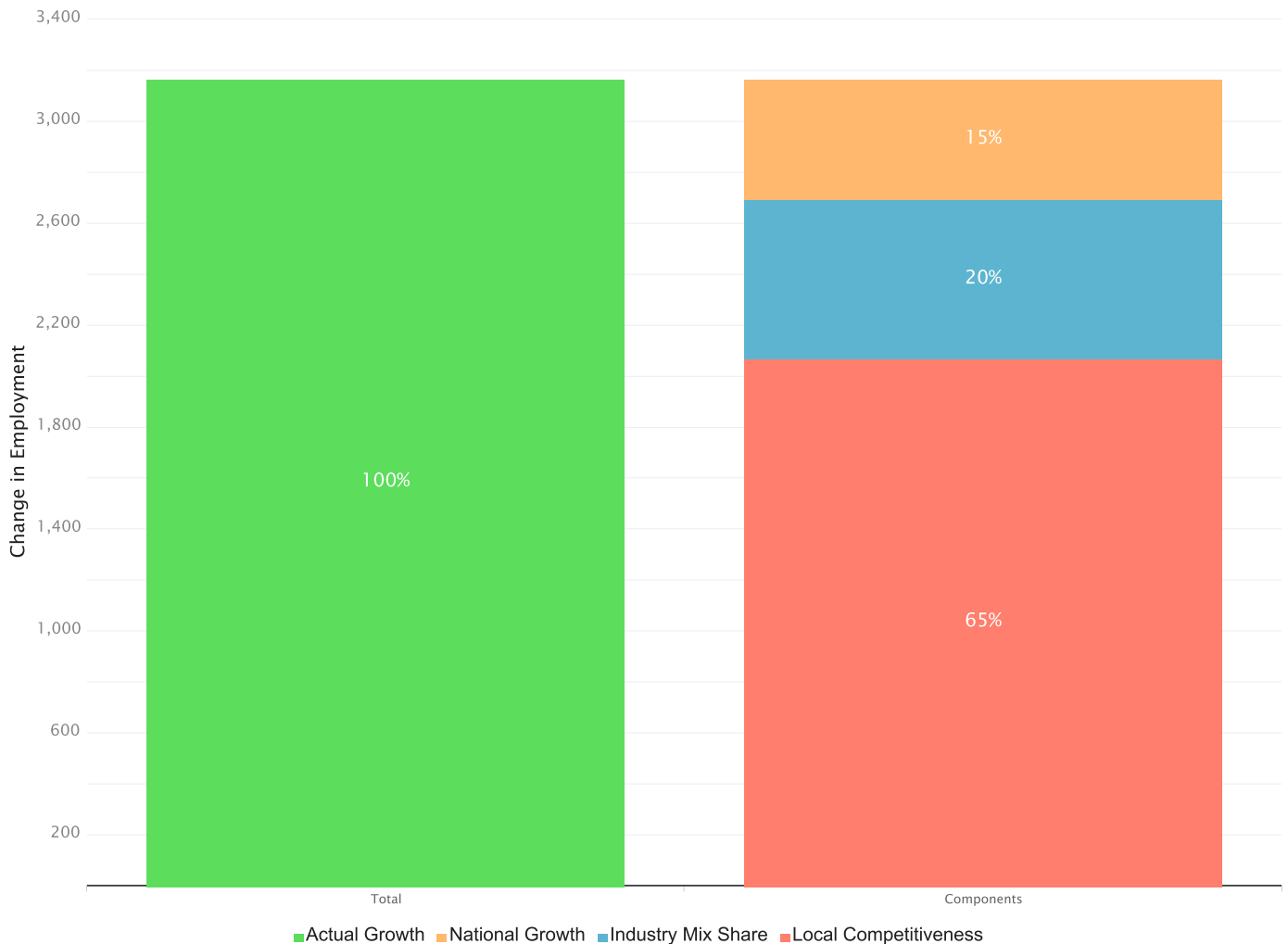
| 6-digit Occupation | Empl | Avg Ann Wages | Annual Demand |
|--|--------------|---------------|---------------|
| Laborers and Freight, Stock, and Material Movers, Hand | 1,236 | \$29,300 | 227 |
| Heavy and Tractor-Trailer Truck Drivers | 1,016 | \$45,000 | 139 |
| Light Truck Drivers | 941 | \$47,400 | 153 |
| Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity | 461 | \$28,200 | 86 |
| Postal Service Mail Carriers | 359 | \$49,400 | 32 |
| First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors | 191 | \$56,400 | 28 |
| Couriers and Messengers | 181 | \$28,700 | 21 |
| Industrial Truck and Tractor Operators | 174 | \$35,900 | 26 |
| Shipping, Receiving, and Inventory Clerks | 129 | \$35,600 | 16 |
| Automotive Service Technicians and Mechanics | 128 | \$40,400 | 12 |
| Remaining Component Occupations | 2,428 | \$63,100 | 333 |
| Total | 7,272 | | |

 The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

Drivers of Employment Growth

Over the ten years ending 2019, employment in Transportation and Warehousing for Fort Bend County, Texas added 3,166 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a gain of 2,066 jobs—meaning this industry was more competitive than its national counterpart during this period.

Drivers of Employment Growth for Fort Bend County, Texas



Source: JobsEQ®, Data as of 2019Q4

- 💡 Shift-share analysis sheds light on the factors that drive regional employment growth in an industry. A positive change in local competitiveness indicates advantages that may be due to factors such as superior technology, management, and labor pool, etc.
- 💡 National growth is due to the overall growth or contraction in the national economy. Industry mix share is the growth attributable to the specific industries examined (based on national industry growth patterns and the industry mix of the region).

Employment Distribution by Type

The table below shows the employment mix by ownership type for Transportation and Warehousing for Fort Bend County, Texas. Four of these ownership types — federal, state, and local government and the private sector — together constitute “Covered Employment” (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

“Self-Employment” refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



| | Empl | % |
|--------------------|-------|-------|
| Private | 4,562 | 62.7% |
| Self-Employment | 1,937 | 26.6% |
| Local Government | 40 | 0.6% |
| Federal Government | 573 | 7.9% |
| Other Non-Covered | 159 | 2.2% |

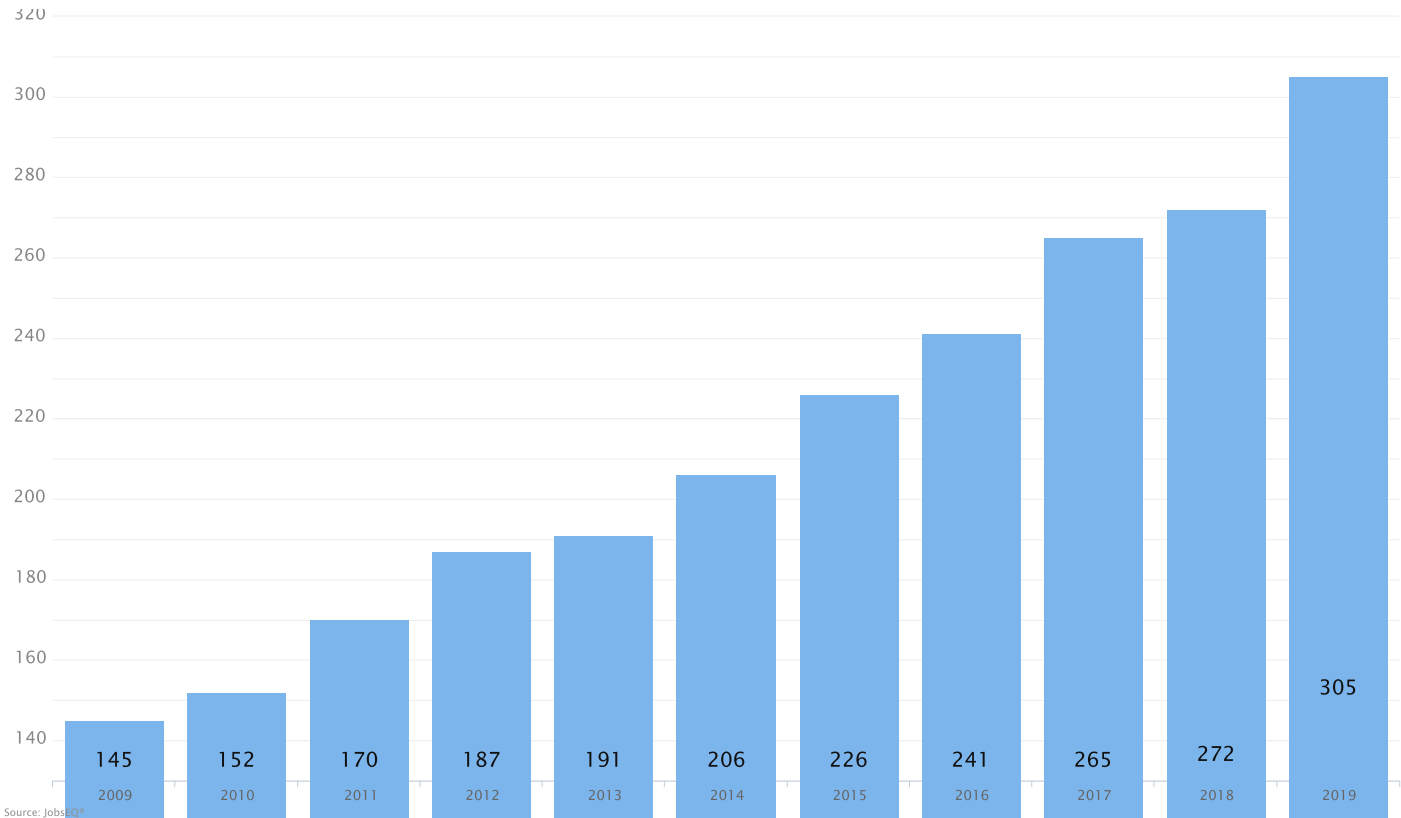
Source: JobsEQ®



Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

Establishments

In 2019, there were 305 Transportation and Warehousing establishments in Fort Bend County, Texas (per covered employment establishment counts), an increase from 145 establishments ten years earlier in 2009.

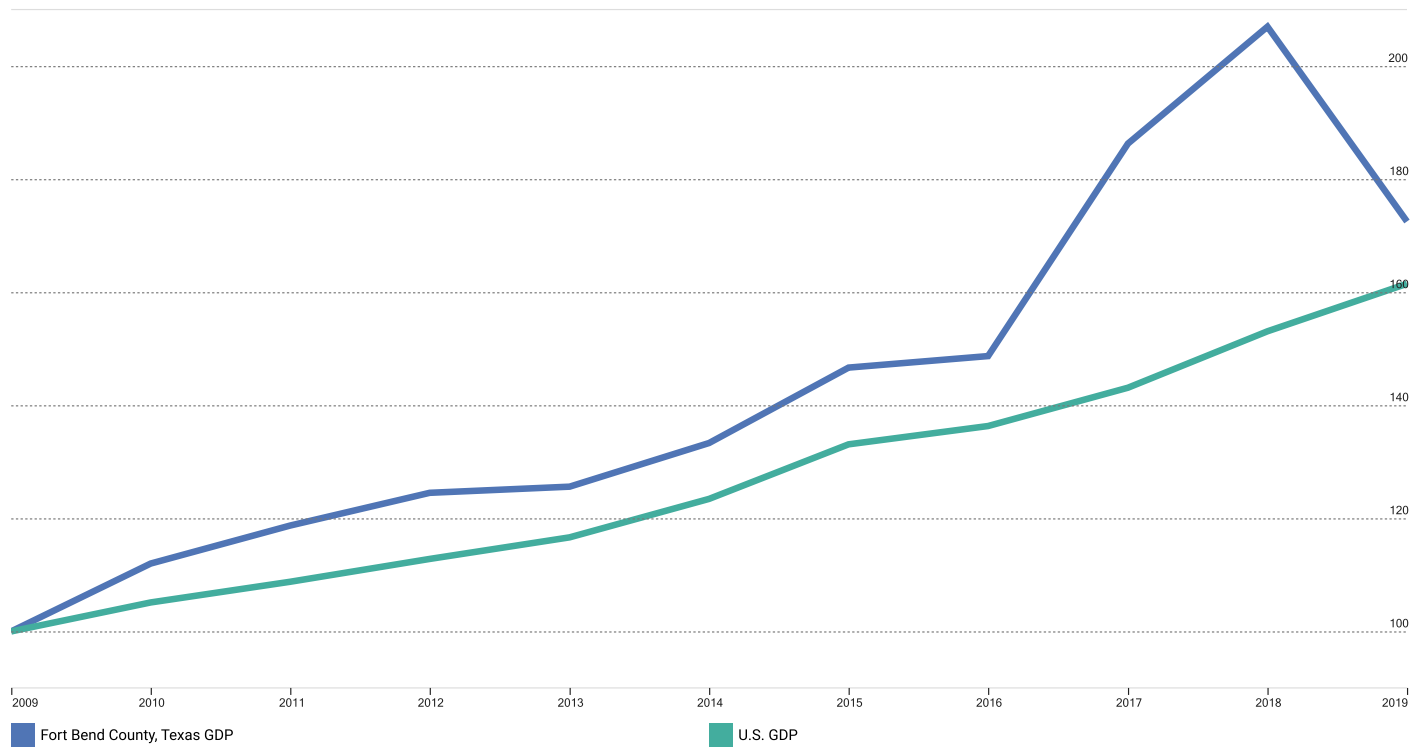


💡 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

GDP & Productivity

In 2019, Transportation and Warehousing produced \$0.5 billion in GDP for Fort Bend County, Texas.

GDP: Indexed 2009 = 100



2.0 %

Industry Share of Total GDP /
3.8 % in the nation



5.6 % ↑

Avg Ann % Change Last 10 Yrs /
4.9 % in the nation



\$150k

Output per Worker /
\$197k in the nation




💡 Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value-added to a regional economy in the form of labor income, proprietor's income, and business profits, among others.

💡 Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

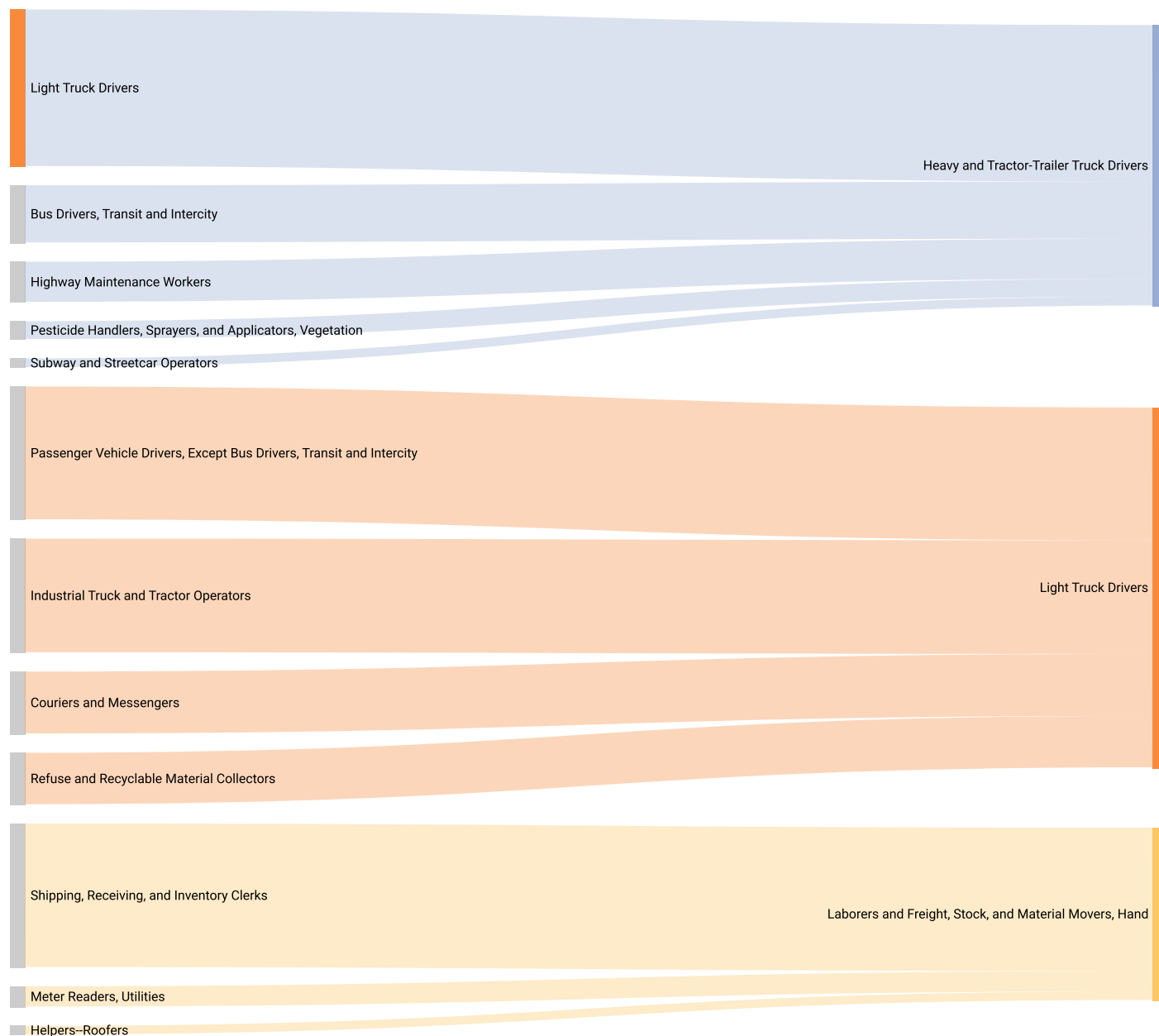
Supply Chain: Top Suppliers


As of 2020Q3, Transportation and Warehousing in Fort Bend County, Texas are estimated to make \$381.4 million in annual purchases from suppliers in the United States with about 49% or \$187.9 million of these purchases being made from businesses located in Fort Bend County, Texas.

| 4-digit Supplier Industries | Purchases from In-Region (\$M) | Purchases from Out-of-Region (\$M) |
|---|--------------------------------|------------------------------------|
| Petroleum and Coal Products Manufacturing | \$19.7 | \$31.7 |
| Couriers and Express Delivery Services | \$16.2 | <\$0.1 |
| Insurance Carriers | \$4.6 | \$10.1 |
| Oil and Gas Extraction | \$8.9 | \$3.5 |
| Activities Related to Real Estate | \$6.3 | \$4.6 |
| Remaining Supplier Industries | \$132.2 | \$143.5 |
| Total | \$187.9 | \$193.5 |

 Supplier-buyer networks can indicate local linkages between industries, regional capacity to support growth in an industry, and potential leakage of sales out of the region.

Sector Strategy Pathways





 The graphics on this page illustrate relationships and potential movement (from left to right) between occupations that share similar skill sets. Developing career pathways as a strategy promotes industry employment growth and workforce engagement.

Postsecondary Programs Linked to Transportation and Warehousing

| Program | Awards |
|---|--------|
| North American University | |
| Business Administration and Management, General | 50 |
| Computer Science | 41 |
| Ogle School Hair Skin Nails-Stafford | |
| Aesthetician/Esthetician and Skin Care Specialist | 184 |

Source: [JobsEQ®](http://www.chmuraecon.com/jobseq)

-  The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.
-  Among postsecondary programs at schools located in Fort Bend County, Texas, the sampling above identifies those most linked to occupations relevant to Transportation and Warehousing. For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

Fort Bend County, Texas Regional Map



Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2020Q3 and are based upon BLS QCEW data, imputed by Chmura where necessary, and supplemented by additional sources including Census ZBP data. Employment forecasts are modeled by Chmura and are consistent with BLS national-level 10-year forecasts.
- Occupation employment is as of 2020Q3 and is based on industry employment and local staffing patterns calculated by Chmura and utilizing BLS OES data. Occupation wages are per the BLS OES data and are as of 2019.
- GDP is derived from BEA data and imputations by Chmura. Productivity (output per worker) is calculated by Chmura using industry employment and wages as well as GDP and BLS output data. Supply chain modeling including purchases by industry are developed by Chmura.
- Postsecondary awards are per the NCES and are for the 2018-2019 academic year.
- Establishment counts are per the BLS QCEW data.
- Figures may not sum due to rounding.

FAQ

What is (LQ) location quotient?

Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is annual demand?

Annual demand is a of the sum of the annual projected growth demand and separation demand. Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. Growth demand is the increase or decrease of jobs expected due to expansion or contraction of the overall number of jobs.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.