WHERE WE STAND

An Update from

EAST-WEST GATEWAY
Council of Governments

Creating Solutions Across Jurisdictional Boundaries

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WHERE WE STAND UPDATE: MANUFACTURING SECTOR

Since its first publication in 1990,* Where We Stand *has come to be recognized as an authoritative source of information about the competitive position of the St. Louis region in the national marketplace. We track over 100 variables that together tell a story about the health of our region compared to 34 peer MSAs.[1] These regions are our domestic competition and provide a consistent yardstick to gauge "Where We Stand." Now in its sixth edition,* Where We Stand *is issued about every three years with periodic updates in between each publication. These briefings provide an opportunity to update the St. Louis region's standing with new data or provide further insight on a specific topic. This issue builds on the data included in the WWS sixth edition, providing a greater understanding of the manufacturing sector in the St. Louis region and introduces new indicators on manufacturing exports.

Introduction

Despite the dramatic loss in manufacturing jobs over the past three decades, manufacturing is a vital contributor to the national and St. Louis regional economies. The manufacturing sector provides employment to an estimated 12.0 million people in the U.S. and 111,200 people in the St. Louis region.[2] Over the last 40 years, the number of manufacturing jobs has decreased substantially, affecting the economy and the lives of many families. In recent years, however, the number of manufacturing jobs in the region has increased. There is evidence that the U.S. is once again competitive in manufacturing, and that St. Louis is poised to benefit from the rebound in American manufacturing. This *Where We Stand Update* compares the St. Louis region's manufacturing industry to that of 34 peer regions and examines the importance of manufacturing to the regional economy.

Manufacturing in the St. Louis Region

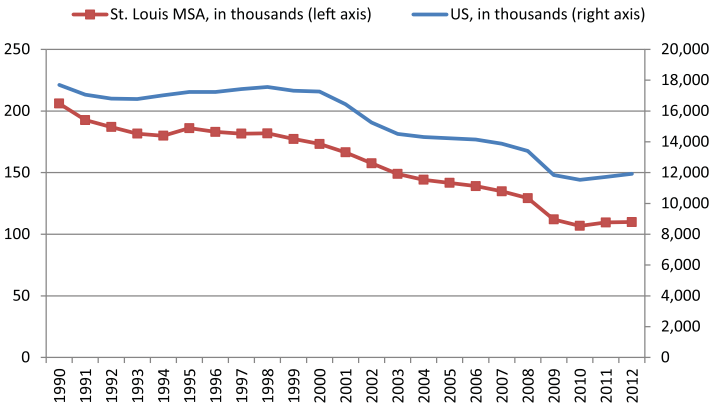
- Continues to provide high paying jobs with average salary of $79k (2011)
- Contributes to 24 percent of Gross Domestic Product (2010)
- Accounts directly for 9 percent of jobs in the region (Feb 2012)
- Accounts for more than half of the region's foreign exports

1 The U.S. Census Bureau defines a MSA, or metropolitan statistical area, as "that of a large population nucleus, together with adjacent communities having a high degree of social and economic integration with that core. MSAs comprise one or more counties…the Office of Management and Budget (OMB) defines metropolitan areas for purposes of collecting, tabulating, and publishing federal data. Metropolitan area definitions result from applying published standards to Census Bureau data."

The Fall and Rise of Manufacturing Jobs

In 1969, manufacturing jobs accounted for 26 percent of employment in the St. Louis region with 292,000 jobs in the industry. The number of jobs steadily decreased to a low of 106,800 jobs in 2010. Over the last couple of years, the number of jobs increased to an estimated 111,200 jobs, as of July 2013. Despite the recent increase, the number of manufacturing jobs remains below what it was before the recession (134,900 in 2007), and the percentage of workers engaged in manufacturing (8.5 percent in 2012) is still much lower than historical levels.[3]

Chart 1: Manufacturing Jobs in United States and St. Louis MSA, 1990 to 2012



Since 1990, manufacturing employment in the St. Louis MSA increased annually in only four years: 1995, 1998, 2011, and 2012. The 2.6 percent increase from 2010 (106,800) to 2011 (109,600) was the largest increase in manufacturing employment in the region since 1995, when there was a 3.4 percent increase. The other

2 Bureau of Labor Statistics, July 2013.

3 Bureau of Labor Statistics, July 2013.

increases were minimal with a 0.2 percent rise in 1998 and 0.3 percent in 2012. The region continues to see some growth with an additional increase of 1.2 percent in the first six months of 2013.

The drop and recent increase in manufacturing jobs is not unique to the St. Louis region. As seen in Chart 2, the percent change in manufacturing employment in the St. Louis region tracks the national trend fairly closely. The recent increase in manufacturing employment followed the largest decrease in decades, for both the region and the nation. In 2009, manufacturing employment decreased 13.4 percent for the St. Louis region and 11.6 percent for the United States. The following year, additional decreases occurred in both geographies; -4.6 percent for St. Louis and -2.7 percent for the United States. Over the next two years (2011 and 2012) manufacturing employment increased 2.9 percent for the St. Louis region and 3.4 percent for the nation.

Manufacturing is....

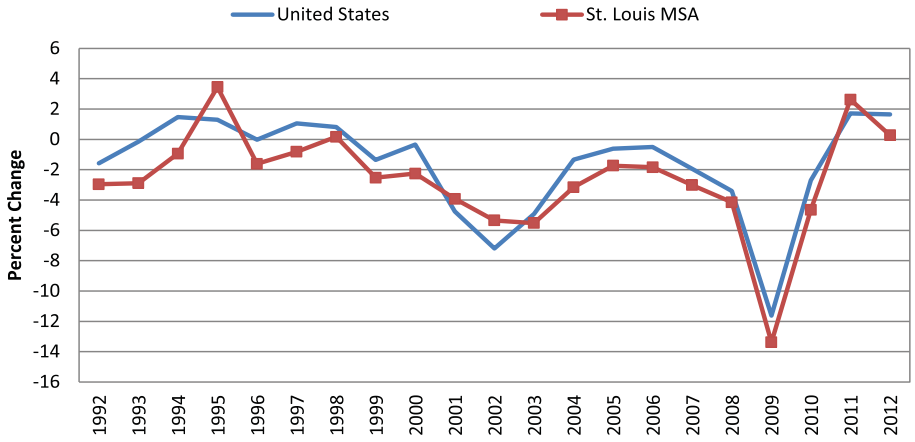
The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.

Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector.

Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

~ North American Industry Classification System

Chart 2: Manufacturing Employment, Percent Change, United States and St. Louis MSA, 1992 to 2012



Source: Bureau of Labor Statistics

Although the pattern is not unique to St. Louis, the region experienced one of the largest decreases in manufacturing employment among the 35 peers; ranking 30th in percent change from 1992 to 2012. Over this 20-year period, the St. Louis MSA experienced a drop in manufacturing employment from 187,000 employees to 109,900 employees. This decrease also dropped the region's ranking in total manufacturing employment from 12th to 17th. Almost all regions lost manufacturing employment over this time period with only three regions—Houston, Salt Lake City and San Antonio—experiencing increases in total manufacturing employment. Two of these regions —Salt Lake City and San Antonio—continue to have low total number of manufacturing jobs, ranking 30th and 33rd, respectively.

Looking at the patterns of manufacturing employment in the United States over the past few decades, a Brookings study concluded that there has been a shift in manufacturing back to the Midwest. The Northeast and Midwest have traditionally been the hubs for manufacturers, but between 1980 and 2000, these regions lost manufacturing jobs while the South and West saw gains. From 2000 to 2010, this shift halted with all regions losing manufacturing jobs and the South and Midwest seeing the same percent loss as the nation as a whole.[4]

MANUFACTURING EMPLOYMENT
In thousands, 1992

1	Los Angeles	901.2
2	New York	751.5
3	Chicago	644.4
4	Detroit	343.7
5	Boston	315.2
6	Philadelphia	311.6
7	Dallas	309.5
8	Seattle	222.2
9	Minneapolis	213.3
10	Houston	203.4
Average		**199.4**
11	Cleveland	196.4
12	**St. Louis**	**187.0**
13	Atlanta	181.1
14	San Francisco	161.9
15	Milwaukee	154.2
16	Cincinnati	148.8
17	Miami	148.2
18	Phoenix	129.5
19	Pittsburgh	122.2
20	Portland	120.9
21	Charlotte	115.5
22	San Diego	111.8
23	Baltimore	111.8
24	Indianapolis	109.3
25	Columbus	92.7
26	Nashville	88.9
27	Kansas City	88.6
28	Louisville	87.6
29	Denver	79.7
30	Washington DC	66.4
31	Memphis	64.5
32	Austin	53.7
33	Salt Lake City	49.0
34	Oklahoma City	46.0
35	San Antonio	45.6

Source: Bureau of Labor Statistics

MANUFACTURING EMPLOYMENT
In thousands, 2012

1	Los Angeles	523.5
2	Chicago	413.7
3	New York	357.9
4	Dallas	257.2
5	Houston	243.2
6	Detroit	219.0
7	Boston	193.6
8	Seattle	184.1
9	Philadelphia	182.6
10	Minneapolis	181.0
11	Atlanta	148.2
Average		**137.2**
12	Cleveland	123.0
13	Milwaukee	119.5
14	Phoenix	117.0
15	San Francisco	116.1
16	Portland	114.2
17	**St. Louis**	**109.9**
18	Cincinnati	105.8
19	San Diego	93.4
20	Pittsburgh	89.7
21	Indianapolis	83.1
22	Miami	76.9
23	Kansas City	72.1
24	Charlotte	70.7
25	Louisville	70.5
26	Nashville	67.3
27	Columbus	65.9
28	Denver	63.2
29	Baltimore	59.1
30	Salt Lake City	55.2
31	Austin	50.9
32	Washington DC	48.7
33	San Antonio	46.8
34	Memphis	44.1
35	Oklahoma City	35.0

Source: Bureau of Labor Statistics

PERCENT CHANGE IN MANUFACTURING EMPLOYMENT 1992-2012

1	Houston	19.6
2	Salt Lake City	12.7
3	San Antonio	2.6
4	Austin	-5.2
5	Portland	-5.5
6	Phoenix	-9.7
7	Minneapolis	-15.1
8	San Diego	-16.5
9	Dallas	-16.9
10	Seattle	-17.1
11	Atlanta	-18.2
12	Kansas City	-18.6
13	Louisville	-19.5
14	Denver	-20.7
15	Milwaukee	-22.5
16	Oklahoma City	-23.9
17	Indianapolis	-24.0
18	Nashville	-24.3
Average		**-24.4**
19	Pittsburgh	-26.6
20	Washington DC	-26.7
21	San Francisco	-28.3
22	Cincinnati	-28.9
23	Columbus	-28.9
24	Memphis	-31.6
25	Chicago	-35.8
26	Detroit	-36.3
27	Cleveland	-37.4
28	Boston	-38.6
29	Charlotte	-38.8
30	**St. Louis**	**-41.2**
31	Philadelphia	-41.4
32	Los Angeles	-41.9
33	Baltimore	-47.1
34	Miami	-48.1
35	New York	-52.4

Source: Bureau of Labor Statistics

4 Helper, Susan, Timothy Krueger, and Howard Wial; *Locating American Manufacturing: Trends in the Geography of Production*; Metropolitan Policy Program at Brookings, April 2012.

PERCENT CHANGE IN MANUFACTURING EMPLOYMENT 2010-2012

1	Detroit	17.5
2	Oklahoma City	12.9
3	Houston	11.9
4	Louisville	11.7
5	Nashville	11.4
6	Seattle	10.3
7	Charlotte	7.4
8	Austin	6.9
9	Portland	6.7
10	Milwaukee	6.0
11	San Antonio	5.9
12	Phoenix	5.7
13	Cleveland	5.6
14	Salt Lake City	5.5
15	Minneapolis	4.5
16	Columbus	4.1
Average		**3.9**
17	Atlanta	3.9
18	Denver	3.4
19	**St. Louis**	**2.9**
20	Pittsburgh	2.6
21	Cincinnati	2.4
22	Dallas	2.4
23	Chicago	2.3
24	Indianapolis	1.5
25	Miami	1.2
26	San Diego	0.5
27	Los Angeles	0.0
28	Boston	-0.4
29	San Francisco	-0.5
30	Memphis	-1.3
31	Kansas City	-1.4
32	New York	-2.1
33	Philadelphia	-2.5
34	Baltimore	-4.7
35	Washington DC	-6.5

Source: Bureau of Labor Statistics

The most recent data is even more positive for the Midwest with nearly half of all manufacturing jobs gains from 2010 to 2012 occurring in that region of the US.[5] Metro peer regions in the Northwest, South and Midwest saw gains in manufacturing employment in the last two years. Of the regions that experienced over 10 percent growth, three (Houston, Detroit and Seattle) have some of the largest numbers of total manufacturing jobs while the other three are below average in the total number of jobs in the sector. The increase experienced in the St. Louis region from 2010 to 2012 was the 19th largest among the peer regions, just below the average increase of 3.9 percent.

Importance of the Manufacturing Industry

Despite the decline in manufacturing employment, the sector remains a key component of the United States and the St. Louis regional economies. Not only does the sector continue to provide a large number of jobs, it also has substantial positive impacts on the economy.

- Manufacturing jobs are relatively high paying, particularly for less formally educated workers.
- Manufacturers account for 68 percent of domestic research and development spending by US companies.[6]
- Over half of all U.S. foreign exports are attributed to the manufacturing sector.
- For every dollar in final sales of manufactured products, $1.34 is generated in other sectors, compared to 55 and 58 cents for retail and wholesale trade, respectively.
- Manufacturing provides 11.9 million direct U.S. jobs and supports an additional 5.8 million jobs in other sectors.[7]

5 Helper, Susan, Timothy Krueger, and Howard Wial; *Locating American Manufacturing: Trends in the Geography of Production*; Metropolitan Policy Program at Brookings, April 2012.

6 Helper, Susan, Timothy Krueger, and Howard Wial, *Why Does Manufacturing Matter? Which Manufacturing Matters?*, Metropolitan Policy Program at Brookings, February 2012 and Facts about Manufacturing, Manufacturing Institute, November 2012.

7 Helper, November 2012.

Employment Remains High and High Paying

For the St. Louis region, the importance of manufacturing to the economy is illustrated by the percent of total employment the industry encompasses. The MSA's ranking on this indicator slipped, but the region remains above average, ranking 16th among the peers in 2012 with 8.5 percent of total employment in the manufacturing sector. All regions saw a decrease in the proportion of their employment consisting of manufacturing jobs. St. Louis experienced one of the largest decreases with a 7.5 percentage point decrease. Yet, St. Louis remains above average among the peer regions with a larger proportion of employment attributed to manufacturing than 19 of the peer regions.

MANUFACTURING, PERCENT OF TOTAL EMPLOYMENT, 1992

1	Charlotte	20.7
2	Milwaukee	20.3
3	Cleveland	19.6
4	Los Angeles	18.3
5	Detroit	18.2
6	Cincinnati	17.2
7	Louisville	17.0
8	Seattle	16.7
9	Nashville	16.5
10	Chicago	16.3
11	Portland	16.2
12	**St. Louis**	**16.0**
13	Indianapolis	15.9
14	Dallas	15.4
15	Minneapolis	15.1
16	Boston	15.0
Average		**13.6**
17	Memphis	13.0
18	Philadelphia	13.0
19	Phoenix	12.7
20	Austin	12.7
21	Columbus	12.6
22	Salt Lake City	12.3
23	San Diego	11.8
24	Pittsburgh	11.8
25	Houston	11.3
26	Atlanta	11.1
27	Kansas City	10.5
28	Oklahoma City	10.4
29	Baltimore	10.2
30	New York	10.2
31	San Francisco	9.1
32	Denver	9.0
33	Miami	8.9
34	San Antonio	8.1
35	Washington DC	3.0

Source: Bureau of Labor Statistics

MANUFACTURING, PERCENT OF TOTAL EMPLOYMENT, 2012

1	Milwaukee	14.5
2	Cleveland	12.1
3	Detroit	12.0
4	Louisville	11.5
5	Portland	11.3
6	Seattle	10.8
7	Cincinnati	10.6
8	Minneapolis	10.2
9	Los Angeles	9.9
10	Chicago	9.5
11	Indianapolis	9.1
12	Houston	9.0
13	Salt Lake City	8.6
14	Nashville	8.6
15	Dallas	8.5
16	**St. Louis**	**8.5**
17	Charlotte	8.3
Average		**8.0**
18	Boston	7.7
19	Pittsburgh	7.7
20	San Diego	7.4
21	Memphis	7.3
22	Kansas City	7.2
23	Columbus	6.9
24	Philadelphia	6.7
25	Phoenix	6.7
26	Atlanta	6.3
27	Austin	6.2
28	Oklahoma City	5.9
29	San Francisco	5.9
30	San Antonio	5.3
31	Denver	5.1
32	Baltimore	4.5
33	New York	4.2
34	Miami	3.4
35	Washington DC	1.6

Source: Bureau of Labor Statistics

CHANGE IN THE PORTION OF TOTAL EMPLOYMENT THAT WAS MANUFACTURING 1992-2012

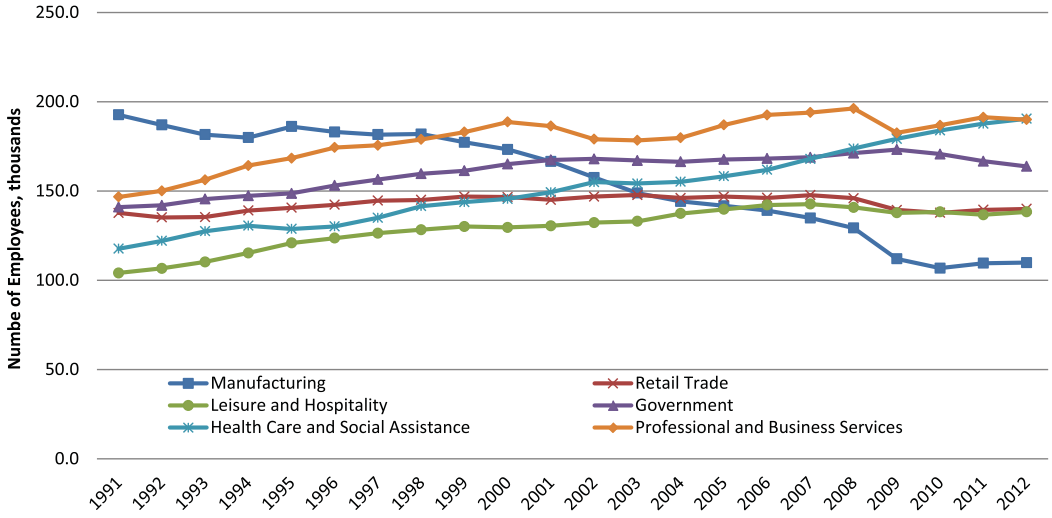
1	Washington DC	-1.4
2	Houston	-2.3
3	San Antonio	-2.7
4	San Francisco	-3.2
5	Kansas City	-3.3
6	Salt Lake City	-3.7
7	Denver	-3.9
8	Pittsburgh	-4.0
9	San Diego	-4.4
10	Oklahoma City	-4.5
11	Atlanta	-4.8
12	Minneapolis	-4.8
13	Portland	-4.9
14	Louisville	-5.4
15	Miami	-5.5
Average		**-5.6**
16	Columbus	-5.6
17	Memphis	-5.7
18	Milwaukee	-5.7
19	Baltimore	-5.8
20	Seattle	-6.0
21	New York	-6.0
22	Phoenix	-6.0
23	Detroit	-6.3
24	Philadelphia	-6.3
25	Austin	-6.5
26	Cincinnati	-6.7
27	Chicago	-6.8
28	Indianapolis	-6.8
29	Dallas	-6.9
30	Boston	-7.2
31	Cleveland	-7.5
32	**St. Louis**	**-7.5**
33	Nashville	-8.0
34	Los Angeles	-8.3
35	Charlotte	-12.3

Source: Bureau of Labor Statistics

Although manufacturing remains one of the largest employment sectors in the St. Louis region, it went from the largest in the 1990s to the sixth largest. Over the past two decades, manufacturing, leisure and hospitality, health care and social assistance, retail trade, government, and professional and business services sectors each maintained employment of over 100,000 persons in the region (See Chart 3).

With average earnings per employee of $79,851 in 2011, manufacturing jobs are among the highest paying jobs in the region, particularly among the top six employing industries. Comparatively, retail trade has an average earnings of $27,925, health care $47,925, and government $65,131. In the St. Louis region, manufacturing has seen one of the largest increases in the average compensation per employee with a 9.6 percent increase over the past decade. In a 2012 report, the Brookings Institution looked at the type of manufacturing jobs in the United States for the largest 100 metropolitan areas. The portion of the St. Louis region's manufacturing jobs that are in "very high tech" and "moderately high tech" industries is 40.1 percent, compared to 34.7 percent for the U.S. as a whole. On average, jobs in these industries pay two to three times as much as all other manufacturing jobs.[8]

Chart 3: Six Largest Industries, St. Louis MSA 1992 to 2012



Source: Bureau of Labor Statistics

8 Helper, April 2012.

Table 1: Compensation per Full Time and Part Time Employee
St. Louis MSA, 2011 Dollars

NAICS Industry	2001 (2011 Dollars)	2011 (Dollars)	Percent Change 2001 to 2011
Government and government enterprises	56,629	65,131	15.0
Management of companies and enterprises	105,169	120,105	14.2
Administrative and waste management services	29,629	33,043	11.5
Health care and social assistance	43,662	47,925	9.8
Manufacturing	72,837	79,851	9.6
Average compensation per job for all wage and salary employees	55,062	58,822	6.8
Wholesale trade	71,366	74,999	5.1
Professional, scientific, and technical services	58,084	58,762	1.2
Finance and insurance	56,081	55,655	-0.8
Retail trade	28,268	27,925	-1.2
Accommodation and food services	19,750	19,038	-3.6
Arts, entertainment, and recreation	30,278	28,675	-5.3
Educational services	40,636	35,838	-11.8
Real estate and rental and leasing	17,733	12,738	-28.2

Note: Compensation includes wage and salary disbursements and supplements to wages and salaries (including employer contributions for employee pension and insurance funds and for government social insurance)

Source: Bureau of Economic Analysis [9]

9 The source for compensation data is the Bureau of Economic Analysis (BEA) while the remainder of employment data is from the Bureau of Labor Statistics (BLS). Both bureaus provide employment estimates. BEA is considered more comprehensive while BLS provides more timely data. Both provide consistent descriptions of recent employment trends.

The Role of Exports

Exports are a key component to the manufacturing industry as well as a strong indicator of economic competitiveness.

Manufacturing comprises an estimated 61 percent of U.S. exports and US manufacturing exports support an estimated 6.4 million jobs (2.5 million directly and 3.9 million non-manufacturing jobs).

In 2011, $18.5 billion worth of goods and services were produced in the St. Louis MSA and exported to other countries. Manufacturing was the largest exporting sector, accounting for 62 percent ($11.6 billion) of total foreign exports (See Chart 4). Wholesale trade and management of companies and enterprises are the next two largest exporting sectors, each accounting for about 8 percent of total foreign exports for the MSA.

The largest two exporting manufacturing industries for the MSA are transportation equipment and chemical (See Table 2). Within the transportation equipment industry, aircraft ($2.8 billion) and light truck and utility vehicle ($618 million) manufacturing account for a majority (91 percent combined) of the value of transportation equipment exports. For chemical manufacturing, plastics and resin ($385 million) comprise the largest portion of the sales but medicinal and botanical, soap and cleaning compound, pharmaceutical preparation, and petrochemical manufacturing also each account for over $200 million in sales.

Table 2: Manufacuturing Share of Foreign Exports, St. Louis MSA, 2011

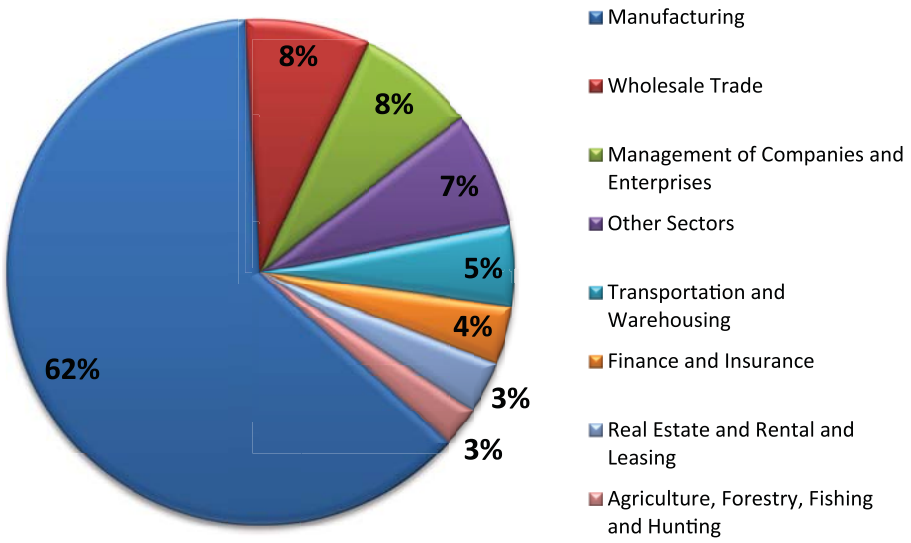
Manufacturing Industry Description	Foreign Exports 2011 (Dollars)	Percent of Total Foreign Exports
Transportation Equipment	3,812,992,625	20.6
Chemical	2,056,846,212	11.1
Primary Metal	1,288,593,051	7.0
Petroleum and Coal Products	1,079,007,171	5.8
Machinery	954,814,000	5.2
Fabricated Metal Product	380,144,184	2.1
Food	335,795,839	1.8
Miscellaneous Manufacturing	274,379,760	1.5
Beverage and Tobacco Product	250,703,165	1.4
Electrical Equipment and Appliance	245,231,726	1.3
Computer and Electronic Product	235,934,329	1.3
Plastics and Rubber Products	232,201,016	1.3
Foreign Exports - All Manufacturing	**11,570,966,948**	**62.4**
MSA Total Exports	**18,529,732,507**	

Source: Implan, 2011

10 Istrate, Emilia and Nicholas Marchio, Export Nation2012: How U.S. Metropolitan Areas Are Driving National Growth, Brookings Institution, 8 March 2012. http://www.brookings.edu/research/reports/2012/03/08-exports#4

11 http://trade.gov/press/press-releases/2013/export-factsheet-september2013-090413.pdf

Chart 4: Foreign Exports by Sector, St. Louis MSA, 2011



Source: Implan, 2011

Tides are Changing in the Manufacturing Industry and St. Louis is Poised to Increase Manufacturing Employment

The recent upswing in manufacturing jobs in the U.S. can partially be attributed to an economy that is rebuilding and bringing jobs back that were lost during the recession but there are also signs that the U.S. is regaining its competitive edge in manufacturing. There are several reasons that are given for this resurgence, including:[12 13 14]

- Rising oil prices and cheaper natural gas ~ The United States has increased energy production, making natural gas plentiful and much more affordable in the U.S. than in Europe or Asia. Oil prices in China have increased five-fold since 2000.

- Higher wages in China and lower wages and higher productivity in U.S. ~ it is estimated that the wage gap between the U.S. and China will close from 22 times higher wages in the U.S. in 2000 to just four times as high by 2015. This along with U.S.'s higher gains in productivity and lower worker turnover rates are making the labor force in the U.S. more competitive.

- Rising land prices in China ~ to secure lower industrial land prices in China, companies will need to move inland, which will add to transportation costs. Industrial land in some U.S. states is much lower. For example, the national average in China is $10.22 per square foot compared to $1.86 to $7.43 per square foot in Alabama and $3.96 in the St. Louis region.[15]

- Leader in research and development ~ The U.S. remains a leader in global innovation with 31 percent of total global spending on research and development, 16 of the world's top 20 universities and U.S. organizations owning more than one-third of all patents globally. Additionally, the U.S. provides companies with certainty that their intellectual property and property rights will be protected. These factors are important not only for the research and development jobs but also for production jobs because companies are realizing the benefits of having their research and development operations close to their operations.

- Strong interest from the administration in creating a national network of manufacturing innovation institutes ~ President Barack Obama has expressed support for creating 15 manufacturing institutes in the country that will help companies, particularly small manufacturers, capitalize on cutting-edge technologies.

12 Sirkin, Harold L., Michael Zinser, and Douglas Hohner; *Made in America, Again: Why Manufacturing will Return to the U.S.*, Boston Consulting Group; August 2011.

13 Welsch, Hugh, *Why Manufacturing Jobs are Returning to America for the First Time in Decades*, 27 February 2013; accessed on 1 March 2013 at http://www.businessinsider.com/manufacturing-jobs-returning-to-america-2013-2?goback=%2Egde_3698300_member_218197156

14 Prah, Pamela M., *States in Recovery: Manufacturing*; Stateline: The Daily News Service of The Pew Charitable Trusts, 27 February 2013; accessed on 1 March 2013 at http://www.pewstates.org/projects/stateline/headlines/states-in-recovery-manufacturing-85899454454

15 St. Louis Industrial Market Report, Research and Forecast, Colliers International, Q2 2013.

The Future of Manufacturing in the St. Louis Region

If manufacturing jobs are returning to the United States in the long term, the St. Louis region has several assets that make it poised to capture some of that growth. The region's history in manufacturing means the workforce is skilled and the infrastructure is in place to support further training and education for these jobs. The strong base in manufacturing, particularly in aerospace and defense and food products, means there is opportunity to spur growth that is dependent on clustering. The region's central location and highly developed integrated transportation infrastructure—the confluence of three major rivers, access to six Class 1 railroads, four major interstates and the second largest inland port in the US—are seen as tremendous assets for the manufacturing sector.

The St. Louis Regional Chamber and the Southwestern Illinois Economic Development Network both recently initiated efforts with specific target areas that seek to build on these manufacturing assets. Additionally, regional leaders are coming together as a result of a regional freight study to better coordinate transportation and land use to facilitate growth of freight in the region which will support a growth in the manufacturing sector.

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