

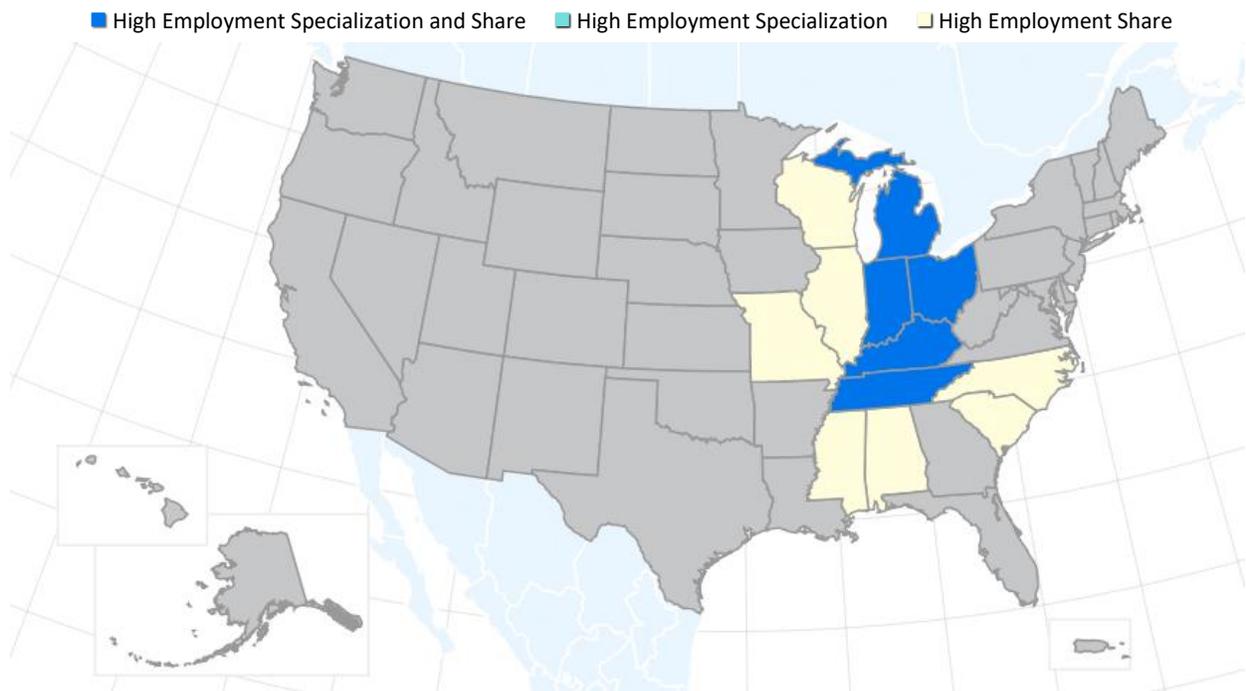
U.S. Industry Report

Automotive Cluster

The Automotive Cluster represents subclusters such as Automotive Parts, Gasoline Engine and Engine Parts, and Motor Vehicles. This cluster includes a variety of industries ranging from Iron Foundries (NAICS 331511) to Heavy Duty Truck Manufacturing (NAICS 336120) and from Motor Vehicle Brake System Manufacturing (NAICS 336340) to Military Armored Vehicle, Tank, and Tank Component Manufacturing (NAICS 336992). As of 2016, there are **8,668 establishments** across the United States that employ **1,000,405 professionals**, earning an **average annual wage of \$59,629**. The following five states offer high employment specialization *and* share.

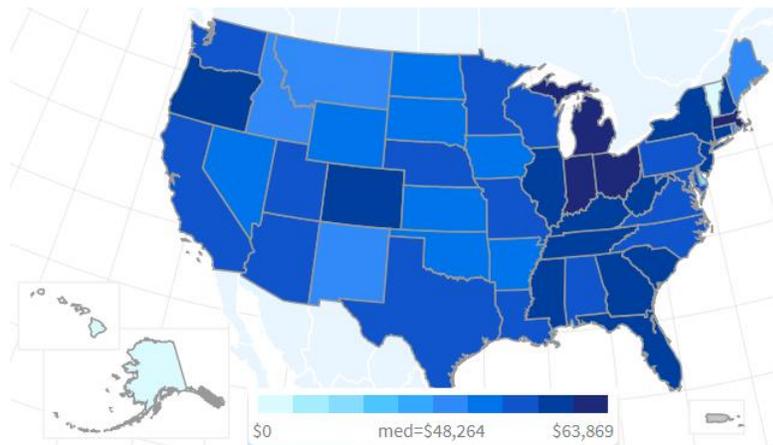
MICHIGAN	KENTUCKY	INDIANA	OHIO	TENNESSEE
Location Quotient 5.8	Location Quotient 5.7	Location Quotient 4.0	Location Quotient 3.1	Location Quotient 2.9
Establishments 954	Establishments 200	Establishments 477	Establishments 709	Establishments 252
Employment 172,490	Employment 67,724	Employment 86,630	Employment 113,124	Employment 56,102

Top States by Specialization & Share



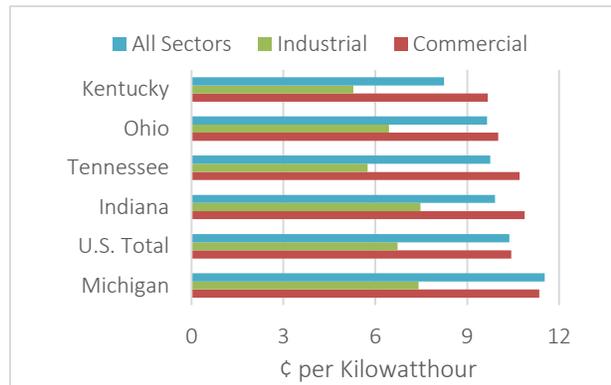
Source: U.S. Cluster Mapping Project

2016 Average Annual Cluster Wages



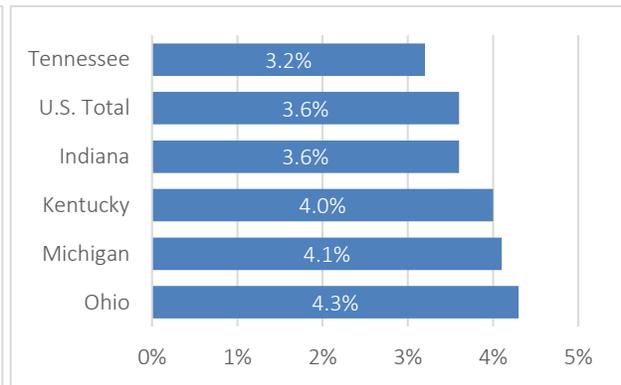
Source: *U.S. Cluster Mapping Project*

Energy Costs (March 2019)



Source: *Energy Information Administration, Electric Power Monthly*

Unemployment Rates (April 2019)



Source: *Bureau of Labor Statistics*

State Cluster Trends (2011-2016)

Highest % ↑ in Employment	HAWAII	MISSOURI	ALASKA	COLORADO	KENTUCKY
	59%	15%	15%	14%	11%
2016 Employment	405	34,870	40	3,319	67,724
	MICHIGAN	FLORIDA	ARIZONA	UTAH	ALABAMA
Most New Establishments	+39	+29	+20	+20	+19
2016 Establishments	954	270	138	88	224
Highest ↑ in Location Quotient	KENTUCKY	MISSOURI	ALABAMA	MISSISSIPPI	TENNESSEE
	+1.49	+0.72	+0.71	+0.62	+0.32
2016 LQ	5.67	1.86	3.97	2.28	2.89

Source: *U.S. Cluster Mapping Project*

Definitions

Cluster – A cluster is a regional concentration of related industries that arise out of the various types of linkages or externalities that span across industries in a particular location.

Establishment – An establishment is a single physical location at which business is conducted or services or industrial operations are performed. It is not necessarily identical with a company or enterprise, which may consist of one or more establishments. When two or more activities are carried on at a single location under a single ownership, all activities generally are grouped together as a single establishment

Location Quotient – A location quotient greater than 1 indicates a higher than average cluster concentration in a location.

NAICS – The North American Industry Classification System is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

High Employment Share – States with high employment *share* rank among the top 10 percent of states with employment information by number of employees in an industry.

High Employment Specialization – States with high employment *specialization* have a location quotient ranking among the top 25 percent of states with employment information for an industry.

U.S. States and Territories



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