

2024

Manufacturing Update

Montgomery County

Agenda



Beech Aircraft Corporation (1940-1945)

Source: Kansas Historical Society

- What is the **landscape** of the Kansas manufacturing economy?
- How **important** is manufacturing to the Kansas economy?
- How does the **Montgomery County** manufacturing landscape compare to the rest of Kansas?



Elk City State Park
Source: Google Maps

Landscape

Top Ten-Defining Manufacturing Segments



Petroleum



Food



Transportation



Printing



Machinery



Plastic



Nonmetallic mineral



Fabricated Metal



Chemical



Computer

Selected companies by the top 10



Petroleum



Food



Transportation



Printing



Machinery



Plastic



Nonmetallic mineral



Fabricated Metal



Chemical



Computer

Top sectors by region



**Fabricated Metal –
Northwest**



**Machinery –
North Central**



**Food –
Northeast**



**Computer –
Kansas City**



**Food-
Southwest**



**Transportation-
South Central**



**Food –
Southeast**

NOTE – Detailed industry employment does not add to the total due to nondisclosure issues, which can underrepresent an industry cluster.

Selected companies by region



Northwest



North Central



Northeast



Kansas City



Southwest



South Central



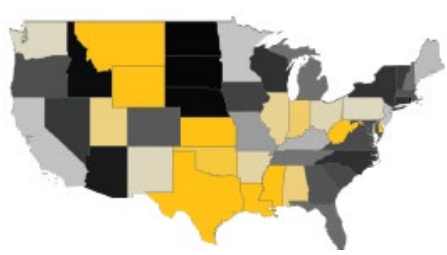
Southeast



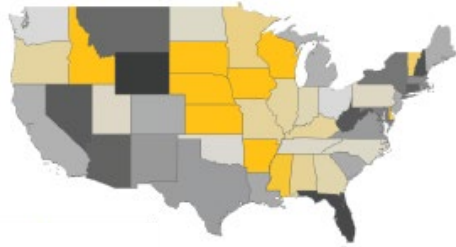
Acme Foundry Building
Source: Google Maps

Impact

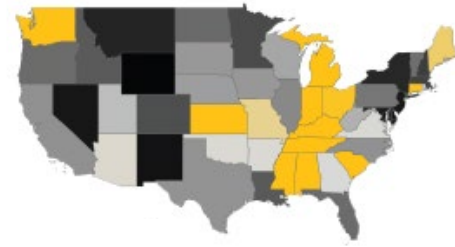
Kansas Tops the Nation in 7 of our Top 10 Segments



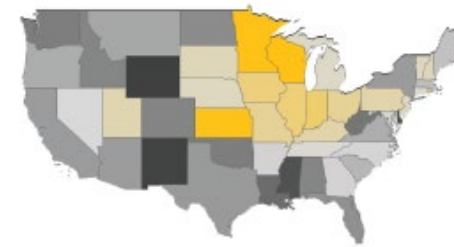
Petroleum ✓



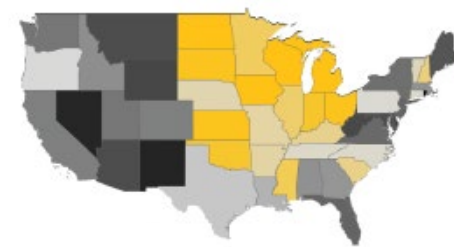
Food ✓



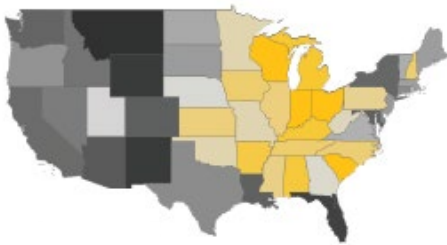
Transportation ✓



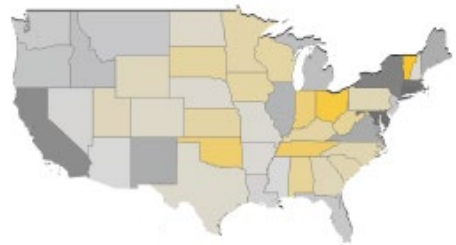
Printing ✓



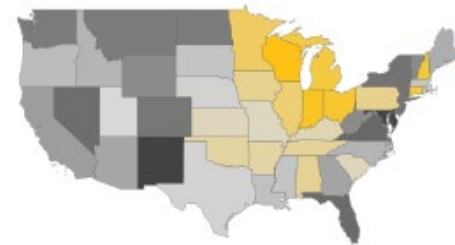
Machinery ✓



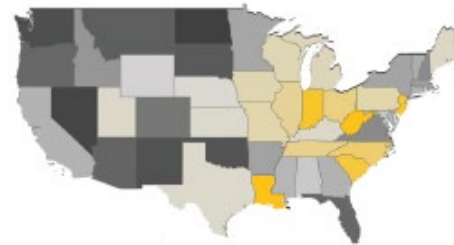
Plastic ✓



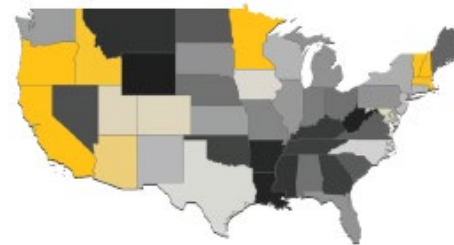
Nonmetallic mineral ✓



Fabricated Metal



Chemical

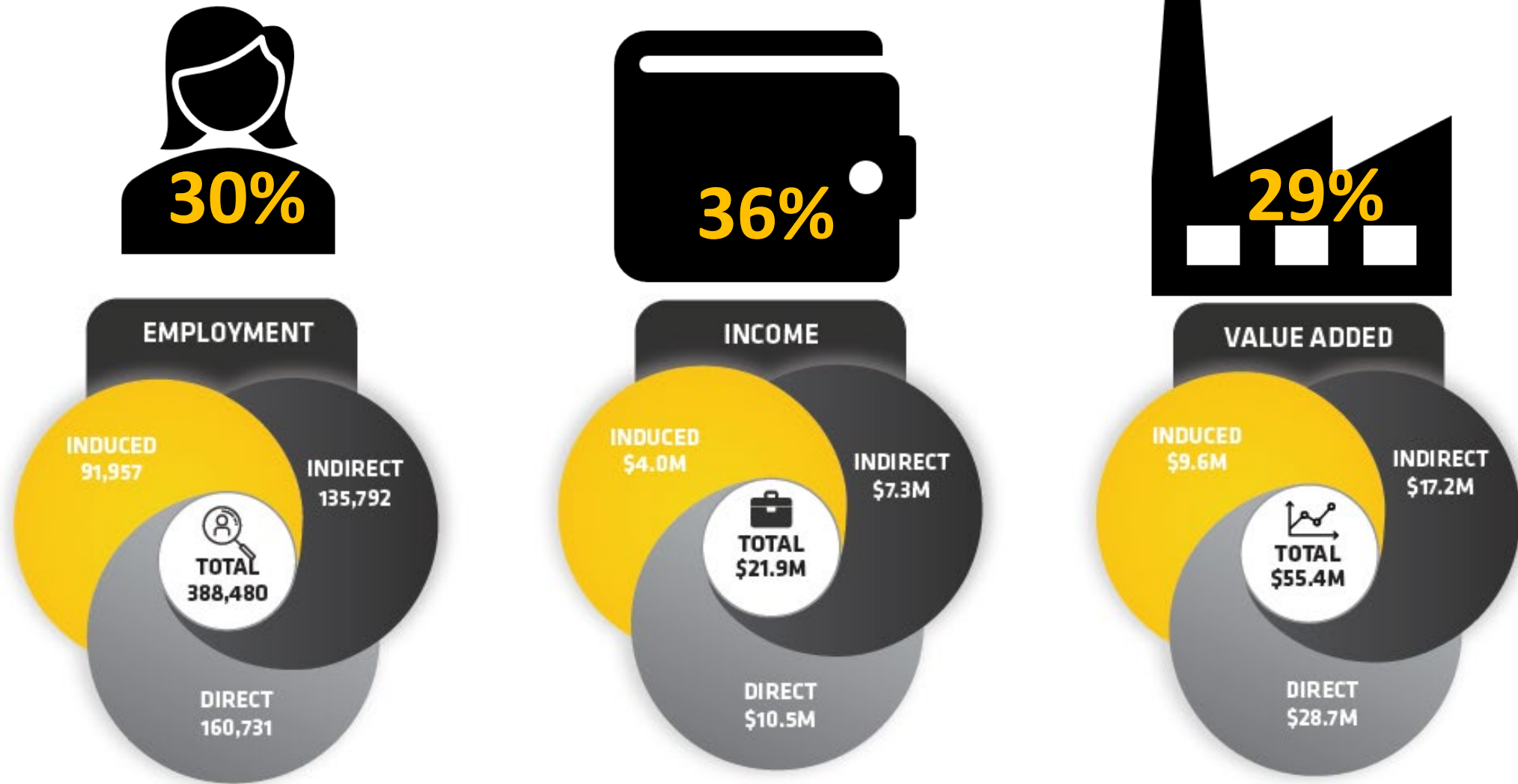


Computer

0.00 2.00

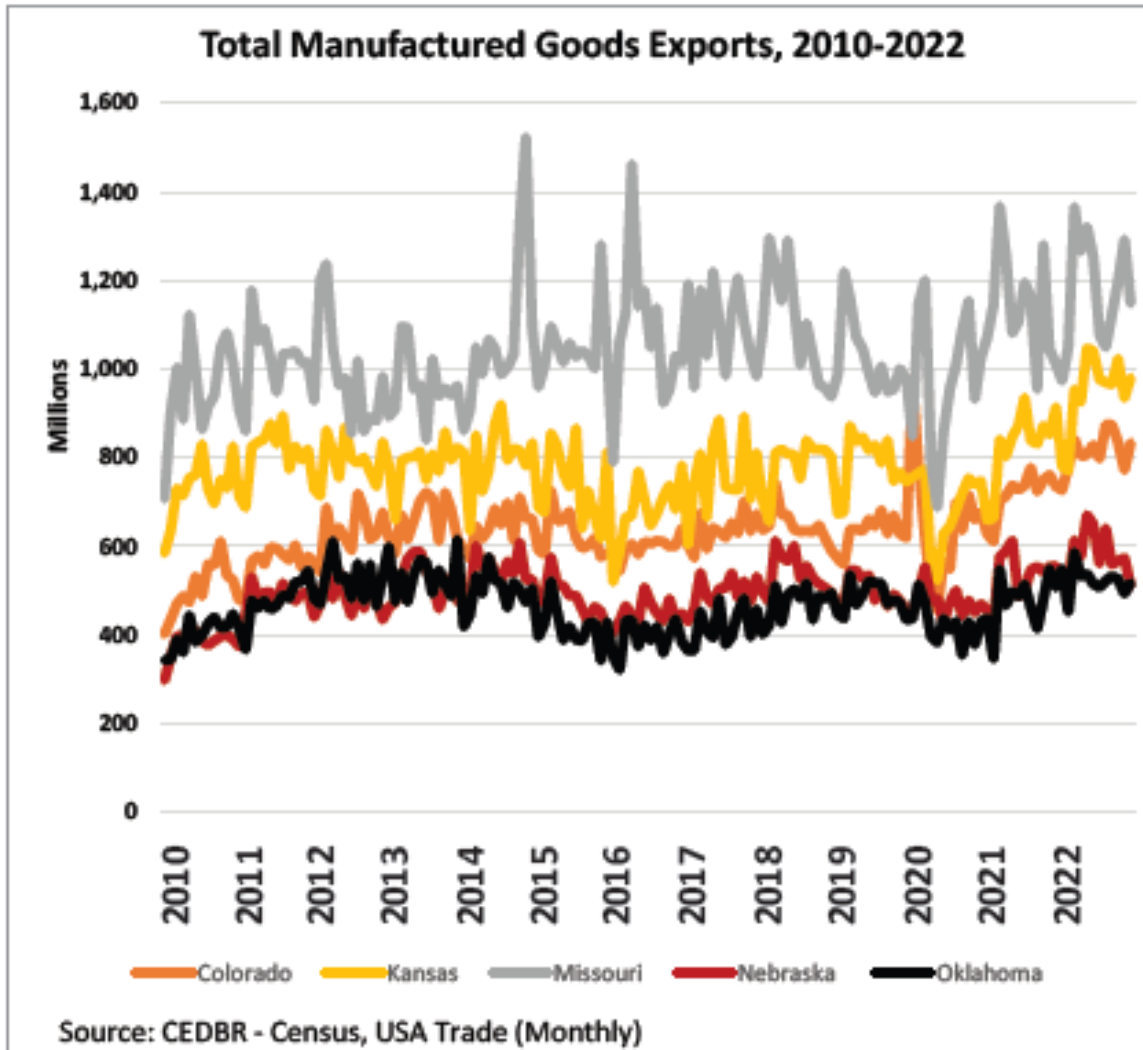
Source: CEDBR, BLS - QCEW

Manufacturing Supports Over 1/3 of the Kansas Economy.



Manufacturing directly supports 160,000 jobs with \$10.5B in annual wages. Those jobs support over 388,000 workers, representing 30% of the Kansas Economy.

KS had **1.7 X** more manufacturing exports per capita than MO



Manufacturing Exports per Capita

State	2021	2022
Colorado	\$1,490	\$1,693
Kansas	\$3,381	\$3,869
Missouri	\$2,223	\$2,294
Nebraska	\$3,266	\$3,552
Oklahoma	\$1,442	\$1,584

Source: CEDBR, USA Trade

Labor Demand – Kansas Manufacturing



1,447 Employers Competing

All employers in the region who posted for this job over the last 12 months.



47,126 Unique Job Postings

The number of unique postings for this job over the last 12 months.



30 Day Median Duration ⓘ

Posting duration is the same as what's typical in the region.



Top Companies

Unique Postings

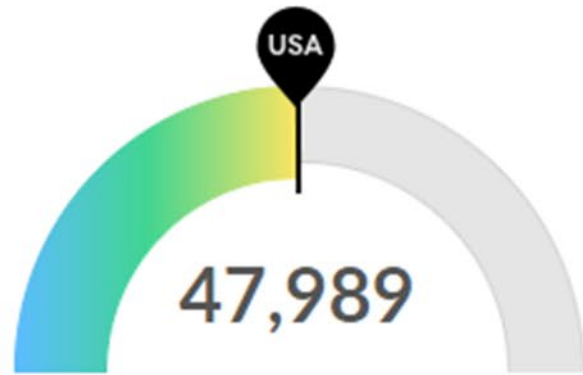
Airbus	1,324	<div style="width: 92%;"></div>
Johnson & Johnson	1,288	<div style="width: 89%;"></div>
Textron	1,219	<div style="width: 84%;"></div>
General Dynamics	1,214	<div style="width: 83%;"></div>
Honeywell International	1,197	<div style="width: 81%;"></div>

Top Job Titles

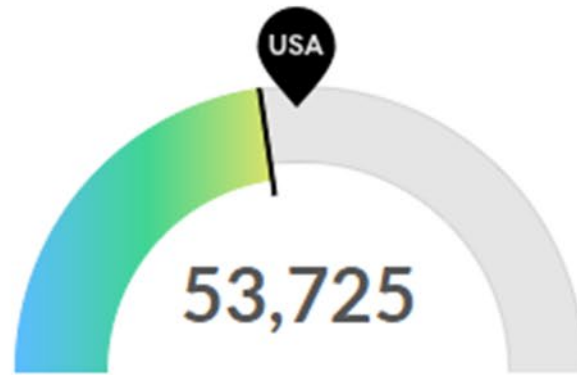
Unique Postings

Maintenance Technicians	447	<div style="width: 94%;"></div>
Machine Operators	316	<div style="width: 67%;"></div>
Material Handlers	311	<div style="width: 66%;"></div>
General Laborers	280	<div style="width: 59%;"></div>
Forklift Operators	254	<div style="width: 54%;"></div>

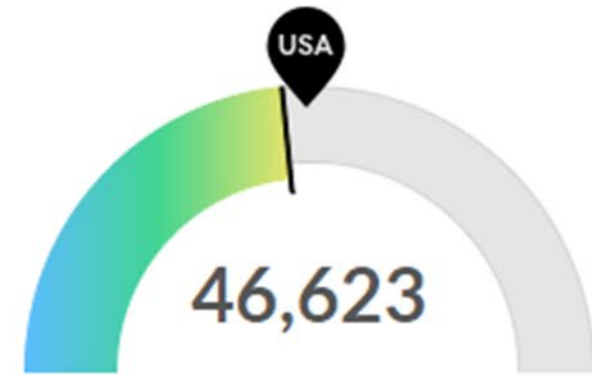
KS Manufacturing is getting more competitive



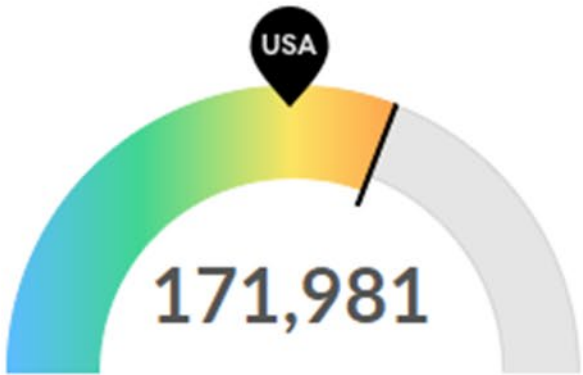
Retiring Soon



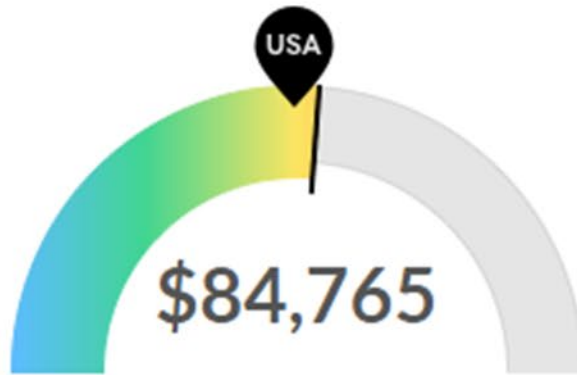
Racial Diversity



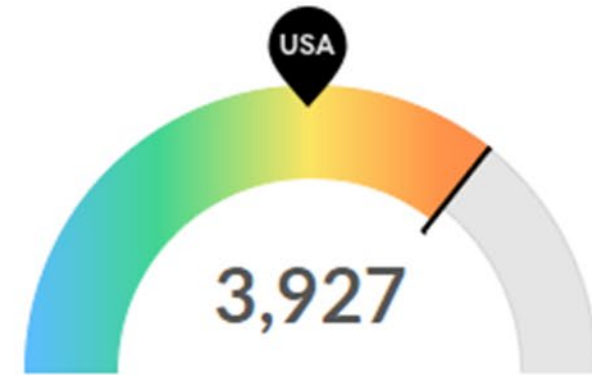
Gender Diversity



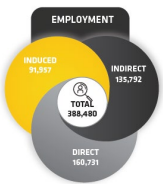
Supply (Jobs)



Earnings Per Job



Demand (Job Postings)



Total Employment Contribution by Segment

9,157

66,779

57,228

10,953

19,345



Petroleum



Food



Transportation



Printing



Machinery



Plastic



Nonmetallic mineral



Fabricated Metal



Chemical



Computer

18,743

10,038

25,150

16,887

16,326

Kansas will likely have an increased labor gap of **21,500** by 2030

Labor Gap - Manufacturing			
Occupation	2023	2025	2030
Management	817	1,167	1,656
Business and Financial Operations	598	844	1,165
Computer and Mathematical	363	545	851
Architecture and Engineering	864	1,254	1,842
Life, Physical, and Social Science	147	202	261
Legal	12	17	22
Arts, Design, Entertainment, Sports, and Media	86	118	152
Healthcare Practitioners and Technical	12	17	22
Protective Service	12	17	22
Food Preparation and Serving Related	133	205	338
Building and Grounds Cleaning and Maintenance	74	101	131
Sales and Related	417	571	740
Office and Administrative Support	751	863	613
Farming, Fishing, and Forestry	37	50	65
Construction and Extraction	231	340	512
Installation, Maintenance, and Repair	764	1,141	1,767
Production	5,736	7,600	9,054
Transportation and Material Moving	1,172	1,654	2,287
Total	12,225	16,705	21,502

Source: CEDBR, BLS - QCEW, BLS - National Employment Matrix, KLIC

Solutions to the KS labor gap

- Internal training
- Labor attraction
- Increased wages

Food and Transportation have the largest expected gap in 2030

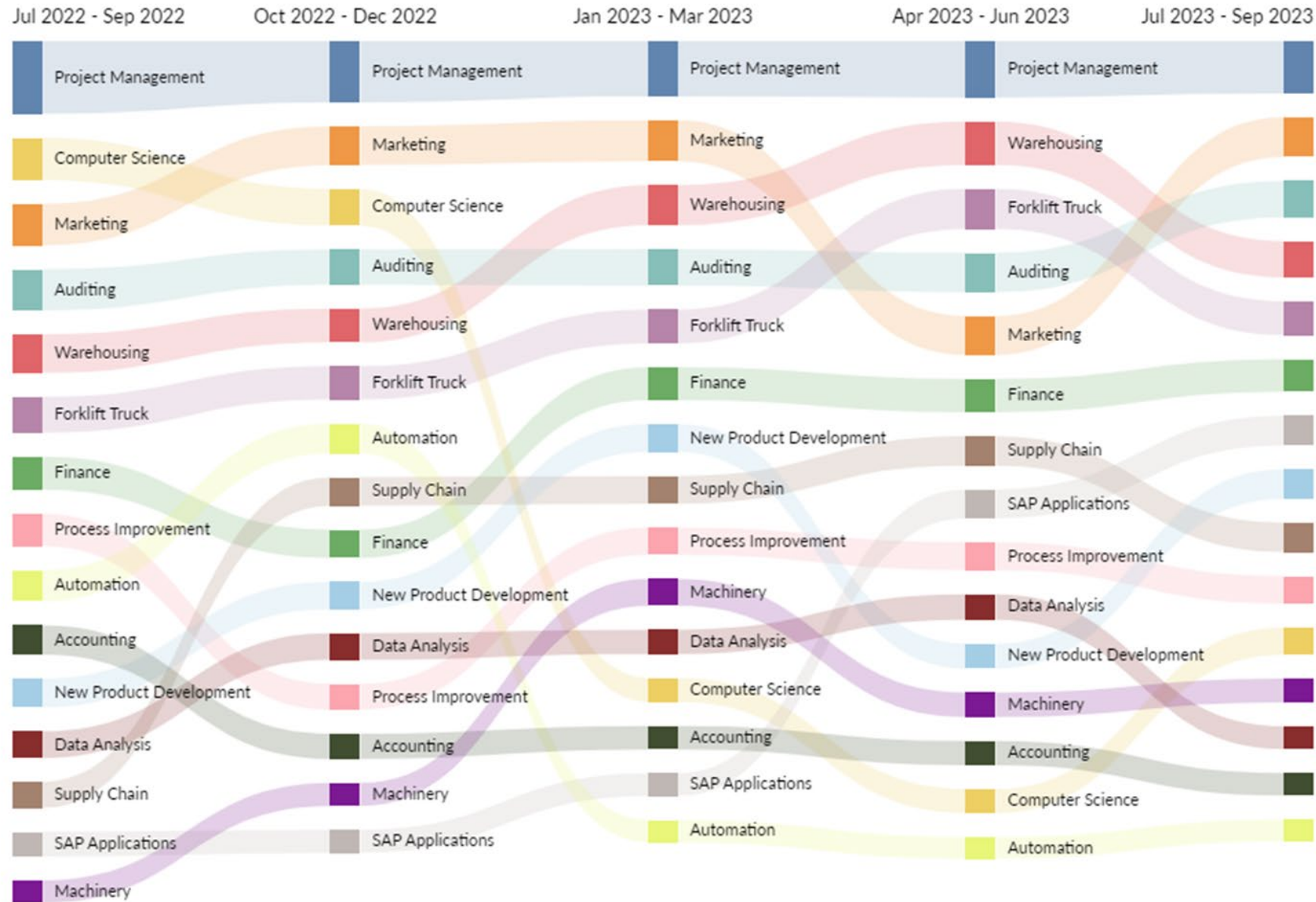
Labor Gap in 2030, By Manufacturing Subsector

Occupation	Food	Printing	Petrol.	Chemical	Plastic	Nonmetal	Fab. Metal	Machinery	Comp. & Elect.	Transp. Eq.
Management	176	15	18	262	64	3	89	157	347	325
Business and Financial Operations	122	8	17	183	39	2	47	111	294	380
Computer and Mathematical	44	6	2	57	8	0	6	74	505	256
Architecture and Engineering	25	0	16	180	48	1	50	329	612	752
Life, Physical, and Social Science	53	0	9	282	4	0	3	5	22	25
Legal	0		0	3	0		0	2	15	0
Arts, Design, Entertainment, Sports, and Media	4	14	1	11	2	0	1	7	22	18
Healthcare Practitioners and Technical	4		0	8	0		0	0	3	0
Healthcare Support	0			3						
Protective Service	4	0	0	3	0	0	1	0	3	12
Food Preparation and Serving Related	107							0	0	0
Building and Grounds Cleaning and Maintenance	110	0	0	25	4	0	4	22	9	12
Sales and Related	116	20	5	86	28	2	36	81	135	91
Office and Administrative Support	89	-56	2	165	28	-31	4	32	178	219
Farming, Fishing, and Forestry	41			5				0		
Construction and Extraction	8	0	17	13	4	13	65	15	6	154
Installation, Maintenance, and Repair	407	1	41	224	124	16	70	162	90	518
Production	2,050	29	74	962	485	36	399	588	827	3,065
Transportation and Material Moving	831	15	22	195	139	17	76	86	69	349
Total	4,192	52	224	2,665	976	60	851	1,672	3,137	6,177

Source: CEDBR, BLS - QCEW, BLS - National Employment Matrix, KLIC



Project Management is the top needed skill in Kansas

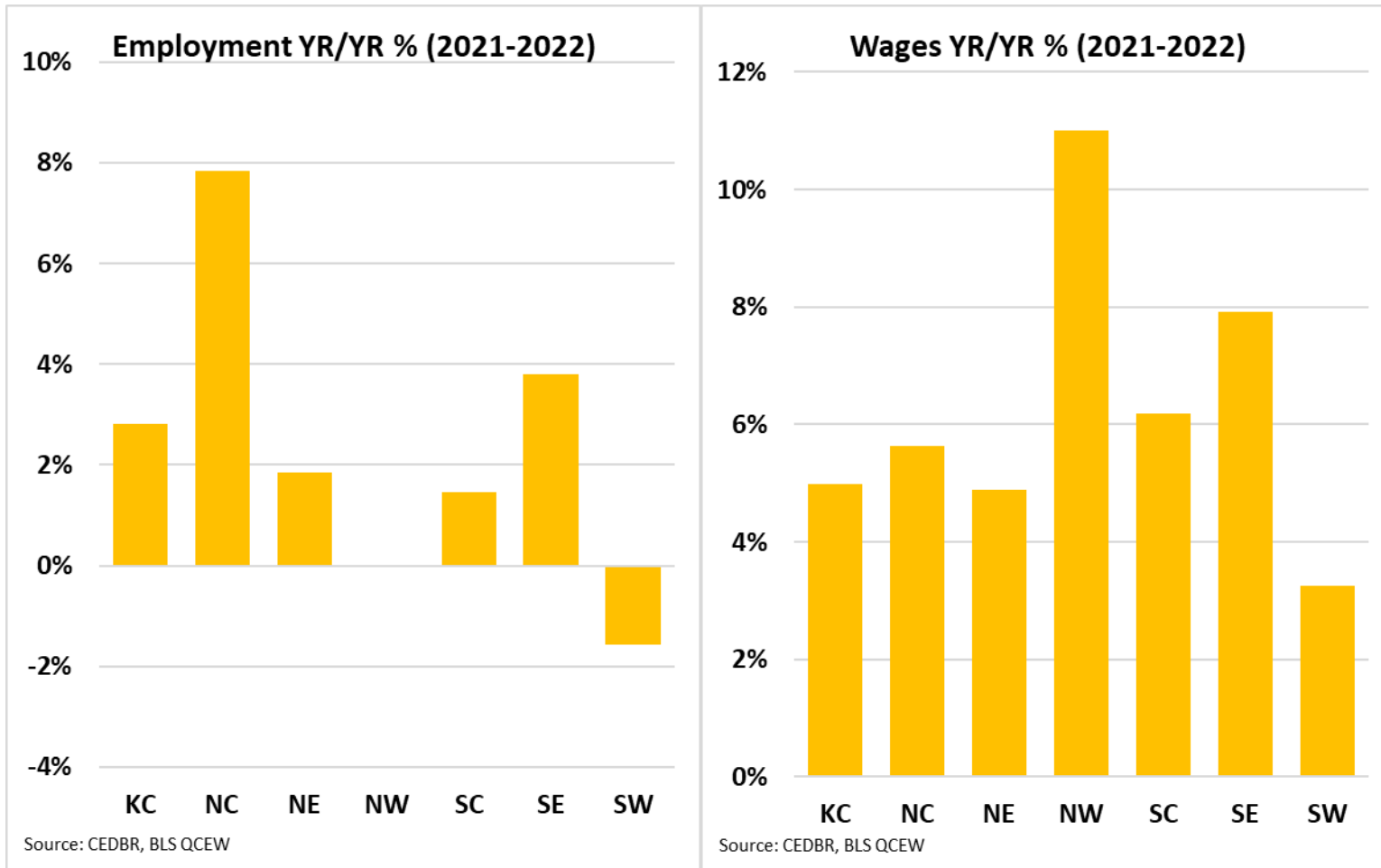




Little House on the Prairie Museum
Source: Google Maps

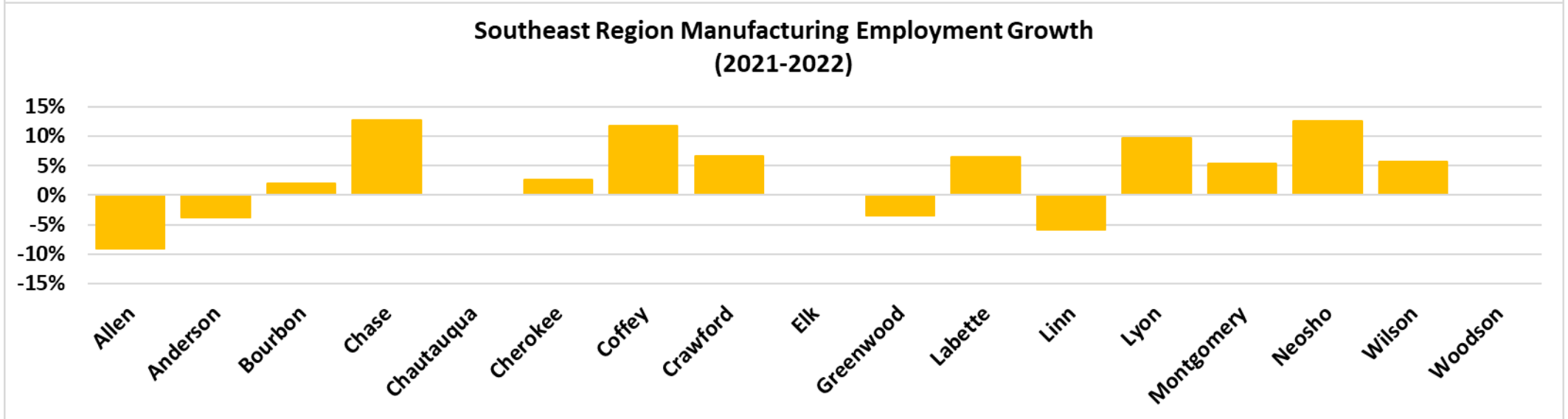
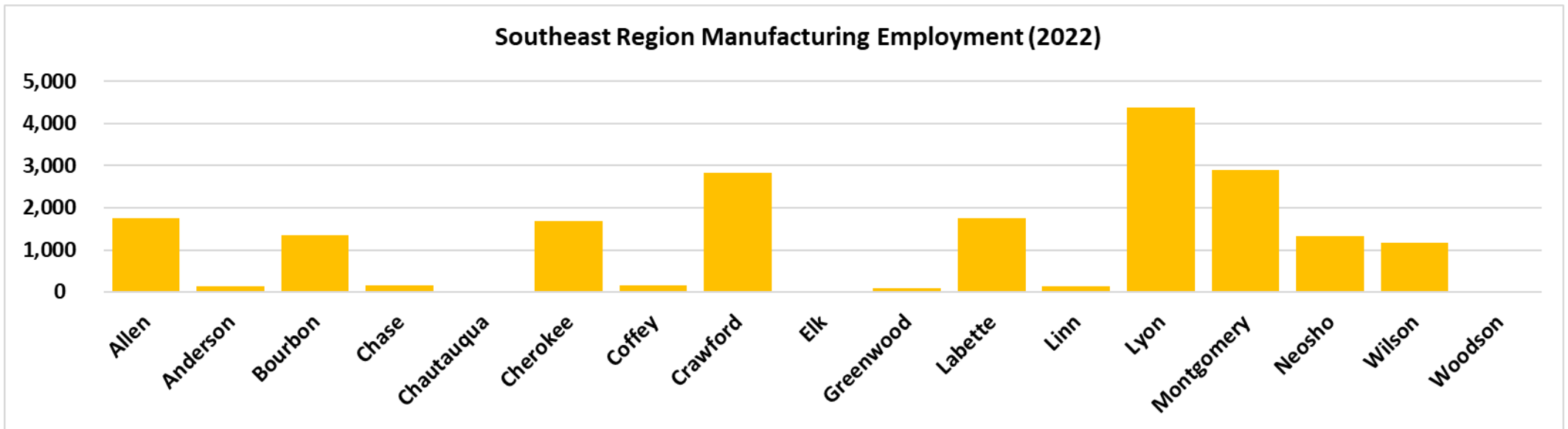
Montgomery County Comparison

Manufacturing Emp & Wages by Region



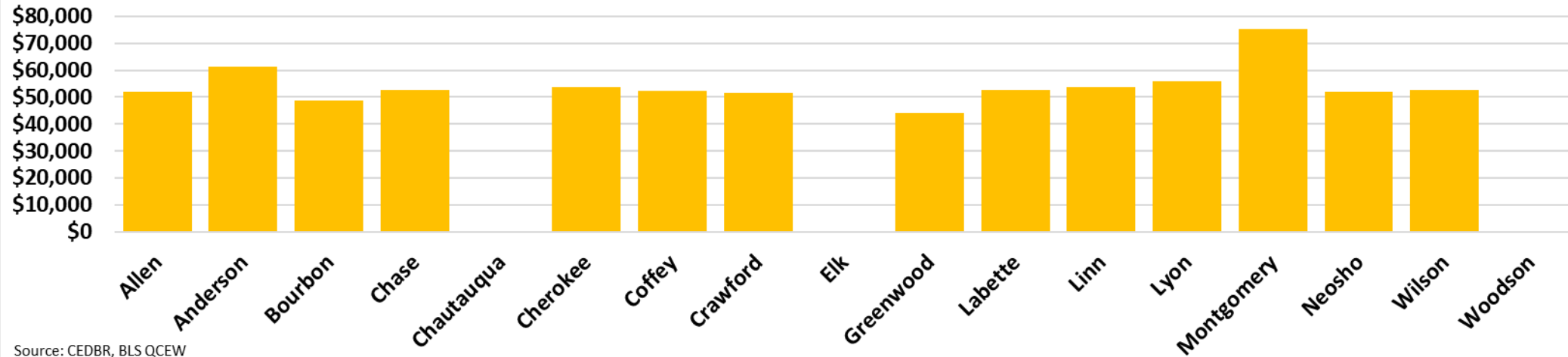
- **Employment**
 - SE saw second highest growth
- **Wage**
 - SE saw second highest growth as well

SE Region Manufacturing Employment

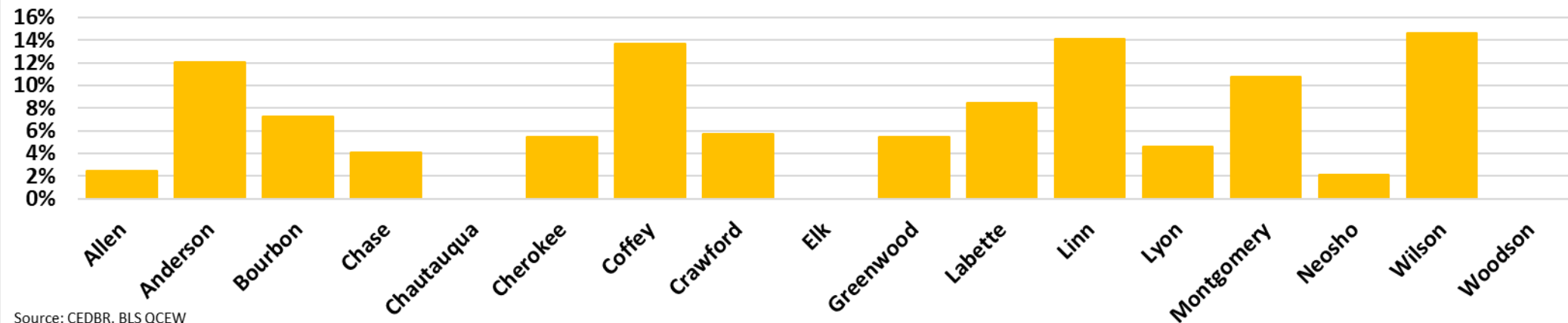


SE Manufacturing Wages

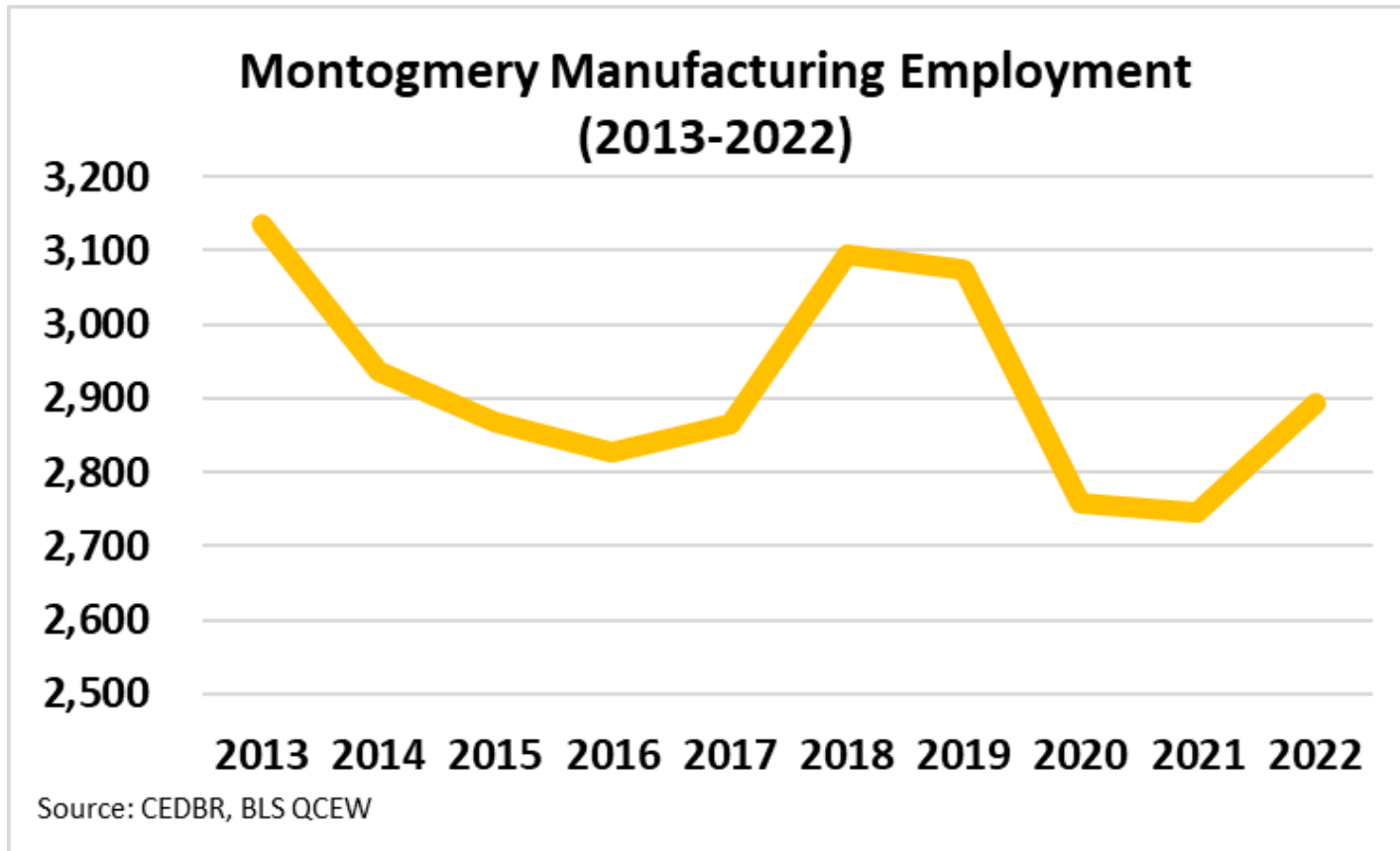
Southeast Region Manufacturing Wages (2022)



Southeast Region Manufacturing Wage Growth (2021-2022)



Montgomery County Manufacturing Employment



- Employment has rebounded 5% from COVID-19 recession
- Difference between current employment and 10-year high is 241 jobs (7% decrease).

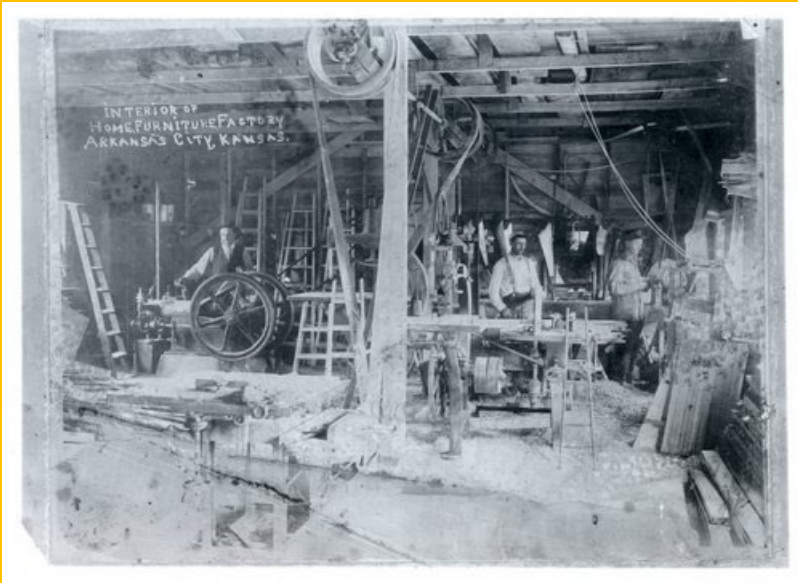
A Broad Manufacturing Mix

Montgomery County Manufacturers (100+ employees)

Company Name	Primary NAICS	Primary NAICS Description
Coffeyville Resources Nitrogen	32531102	Nitrogenous Fertilizer Manufacturing
Cessna Aircraft Co Inc	33641103	Aircraft Manufacturing
Acme Foundry Inc	33151304	Steel Foundries (Except Investment)
Spears Manufacturing Co	32619913	All Other Plastics Product Manufacturing
Standard Motor Products Inc	33639002	Other Motor Vehicle Parts Manufacturing
John Deere Coffeyville Works	33312014	Construction Machinery Manufacturing
Charloma Inc	32619916	All Other Plastics Product Manufacturing
Specialized Vehicles	33639006	Other Motor Vehicle Parts Manufacturing
Jensen International Inc	33151304	Steel Foundries (Except Investment)
Matcor Metal Fabrication	23891054	Site Preparation Contractors
Heartland Cement Co	32731001	Cement Manufacturing
Coffeyville Resources Nitrogen	32411006	Petroleum Refineries

Summary

- South Central Kansas is the dominant manufacturing provider in the state.



Furniture Factory, Arkansas City (1880-1890)

Source: Kansas Historical Society