

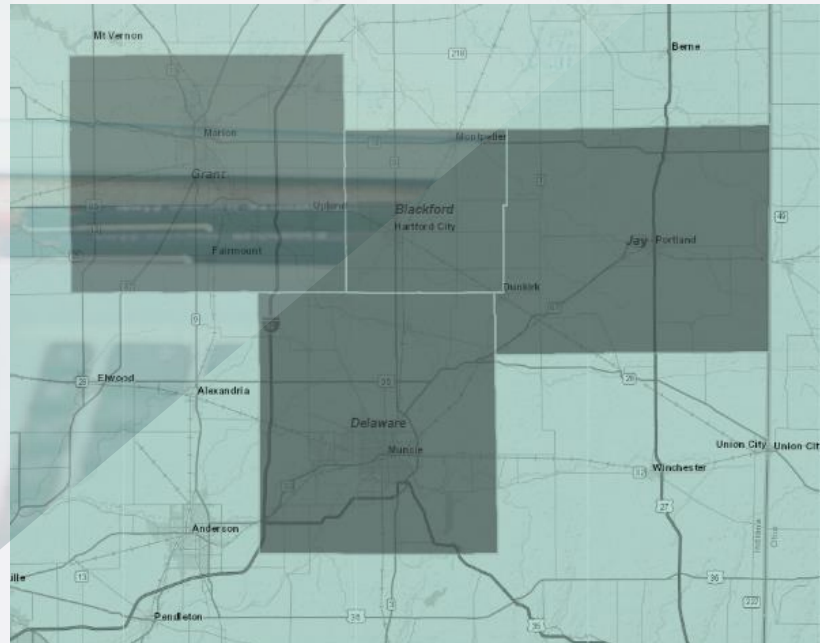
East Central Indiana Regional Planning District

Agribusiness, Food Processing and Technology Cluster Drill-down

Section 01



Economic indicators



Economic Indicators	East Central Indiana Regional Planning District (QCEW, non-QCEW, self-employed and proprietors)
Jobs 2023 (% of total jobs)	5,001 (4.5%)
Job change 2018-2023 (#, %)	+592 (13.4%)
Average total earnings per job 2023	\$62,854
Cost of Living (COL)	93.2
Est. Establishment 2023 (% of total est.)	120 (2.8%)
GRP (Gross Regional Product) 2023	\$615.6 Million
GRP per job 2023 (productivity)	\$ 123,094
Total purchases 2023	\$1.06 Billion
<i>Within region</i>	26%
<i>Imported from outside of region & state</i>	74%
Number of sectors present in agribusiness cluster	36

Section 02



Competitiveness, economic leakages and Workforce

Regional Job Growth:

Three Key Components of the Shift-Share Analysis

Expected Change

The sum of the industrial mix and the national growth effects



National Growth Effect

Explains how much of the regional industry's growth is explained by the overall growth of the national economy

Industrial Mix Effect

Share of regional industry growth explained by the growth of the specific industry sector at the national level








Regional Competitive Effect

Explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses

Note:

The calculations ensure no double counting of job change effects from national to regional levels

Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2023	National Trend 2018-2023 (A)	Industry Trend 2018-2023 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2018-2023 (D)	Regional Performance 2018-2023 (D-C)
Animal Production	1305	113	-161	-49	15	64 
Crop Production	1055	95	-86	10	-37	-46
All Other Miscellaneous Food Manufacturing	630	45	85	129	118	-11
Tortilla Manufacturing	469	28	2	30	148	118 
Flour Milling	415	13	-1	13	264	251 
Commercial Bakeries	210	12	-4	8	79	71 
Farm Supplies Merchant Wholesalers	128	8	-5	3	35	32 
Farm and Garden Machinery and Equipment Merchant Wholesalers	108	8	7	15	14	-2
Farm Labor Contractors and Crew Leaders	93	8	-5	3	2	-2
Breweries	89	4	13	16	45	29 
Soil Preparation, Planting, and Cultivating	86	6	-1	5	16	11 
Poultry Processing	85	18	-16	1	-121	-123
Retail Bakeries	30	5	6	11	-29	-41
Soft Drink Manufacturing	17	5	-4	1	-41	-42
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	15	4	-4	0	-30	-31

Note: Upward arrow  indicates regional competitiveness.

Shift-Share Analysis 2023

Industries that Outperformed

- Animal Production
- Tortilla Manufacturing
- Flour Milling
- Commercial Bakeries
- Farm Supplies Merchant Wholesalers
- Soil Preparation, Planting, and Cultivating
- Breweries

Industries that Underperformed

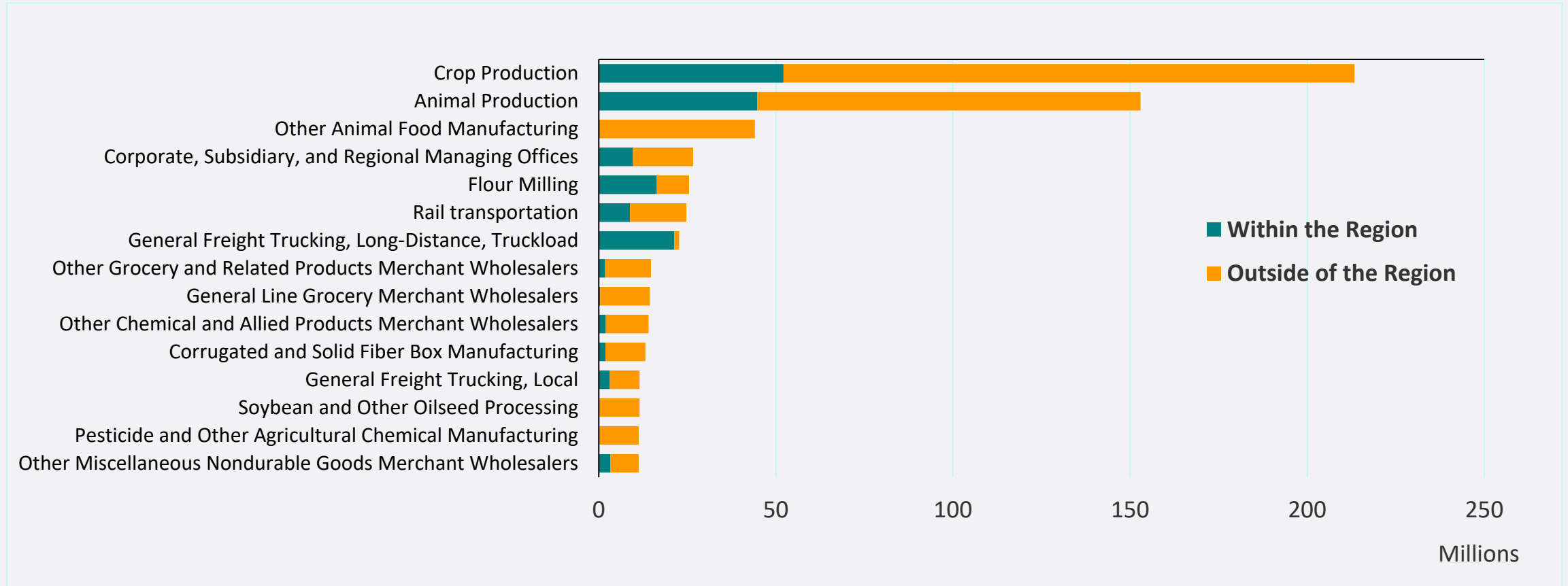
- Crop Production
- All Other Miscellaneous Food Manufacturing
- Poultry Processing
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Farm Labor Contractors and Crew Leaders
- Retail Bakeries
- Soft Drink Manufacturing
- Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour

- Top industry sectors by jobs include Animal Production and Crop Production in 2023.
- Flour Milling has a large competitive shift value of +251. Animal Production and Commercial Bakeries have competitive shift values of +64 and +71, respectively.

Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Million), 2023	% In-Region	% Out of Region
Crop Production	\$213,367,457	24.5%	75.5%
Animal Production	\$152,950,023	29.3%	70.7%
Other Animal Food Manufacturing	\$44,098,574	0.7%	99.3%
Corporate, Subsidiary, and Regional Managing Offices	\$26,682,023	36.2%	63.8%
Flour Milling	\$25,511,919	64.3%	35.7%
Rail transportation	\$24,724,153	35.8%	64.2%
General Freight Trucking, Long-Distance, Truckload	\$22,703,361	94.0%	6.0%
Other Grocery and Related Products Merchant Wholesalers	\$14,747,422	12.2%	87.8%
General Line Grocery Merchant Wholesalers	\$14,421,114	2.7%	97.3%
Other Chemical and Allied Products Merchant Wholesalers	\$14,077,687	14.1%	85.9%
Corrugated and Solid Fiber Box Manufacturing	\$13,179,386	14.3%	85.7%
General Freight Trucking, Local	\$11,511,630	27.2%	72.8%
Soybean and Other Oilseed Processing	\$11,509,777	0.0%	100.0%
Pesticide and Other Agricultural Chemical Manufacturing	\$11,283,391	1.3%	98.7%
Other Miscellaneous Nondurable Goods Merchant Wholesalers	\$11,282,702	29.4%	70.6%

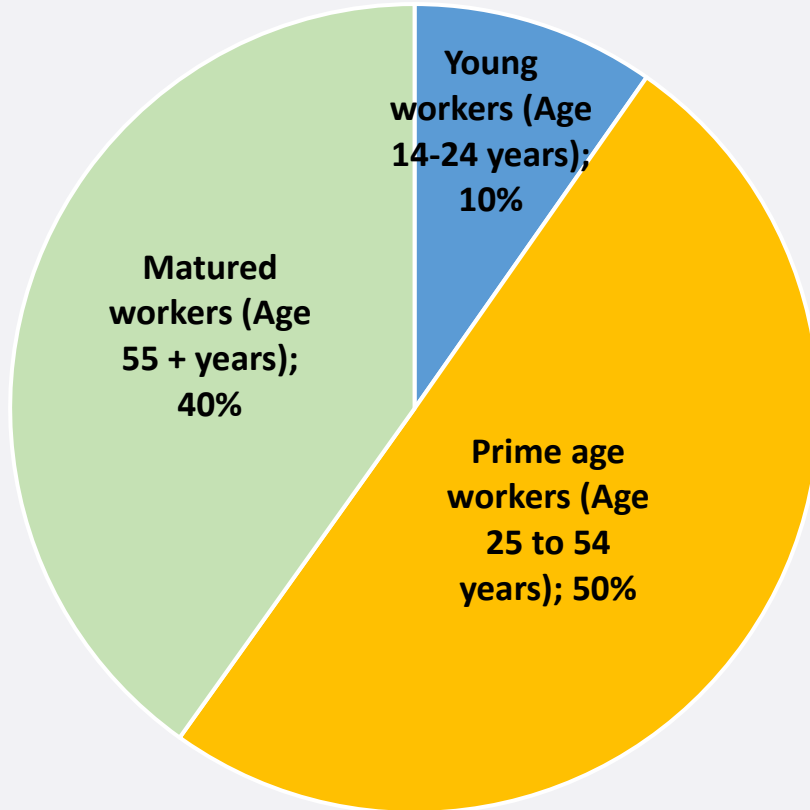
Leakage analysis 2023



- Four industries rely on supply outside the region with more than 97%: a) Other Animal Food Manufacturing, b) General Line Grocery Merchant Wholesalers, c) Soybean and Other Oilseed Processing, and d) Pesticide and Other Agricultural Chemical Manufacturing.

Occupations	Jobs 2023	% Change 2018-2023	% of Total Jobs in Cluster 2023	Median Hour Earnings	Entry level Education	Automation
Farmers, Ranchers, and Other Agricultural Managers	1,629	-2%	32.6%	\$18.80	High school diploma or equivalent	93.5
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	285	4%	5.7%	\$14.85	No formal educational credential	113
Food Batchmakers	207	9%	4.1%	\$19.99	High school diploma or equivalent	111.3
Packaging and Filling Machine Operators and Tenders	193	22%	3.9%	\$20.89	High school diploma or equivalent	116.9
Farmworkers, Farm, Ranch, and Aquacultural Animals	187	-16%	3.7%	\$14.09	No formal educational credential	107.3
Bakers	132	104%	2.6%	\$14.61	No formal educational credential	121.9
Laborers and Freight, Stock, and Material Movers, Hand	128	67%	2.5%	\$16.79	No formal educational credential	117.2
Packers and Packagers, Hand	102	4%	2.0%	\$15.75	No formal educational credential	123.1
First-Line Supervisors of Production and Operating Workers	91	96%	1.8%	\$29.07	High school diploma or equivalent	88.6
Industrial Truck and Tractor Operators	84	74%	1.7%	\$20.92	No formal educational credential	119.5
Agricultural Workers, All Other	78	8%	1.6%	\$15.76	No formal educational credential	107.7
Fast Food and Counter Workers	72	42%	1.4%	\$12.66	No formal educational credential	130.8
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	71	17%	1.4%	\$29.54	High school diploma or equivalent	91.5
Maintenance and Repair Workers, General	64	56%	1.3%	\$21.62	High school diploma or equivalent	109.6
Industrial Machinery Mechanics	57	62%	1.1%	\$28.72	High school diploma or equivalent	109.8

Worker demographics 2023



- Hispanic workers (6%)
- Black or African-American workers (5%)
- Asian workers (2%)
- White workers (85%)
- American Indian or Alaska Native (0.18%)
- Others (2%)

- Male workers (73%)
- Female workers (27%)

- Nearly 40% workers are mated (aged 55 years or more) workers in ECIRPD in this cluster. Young workers are only 9.9% of the labor force. Strategies for talent pipeline are needed to replace the workers nearing retirement.

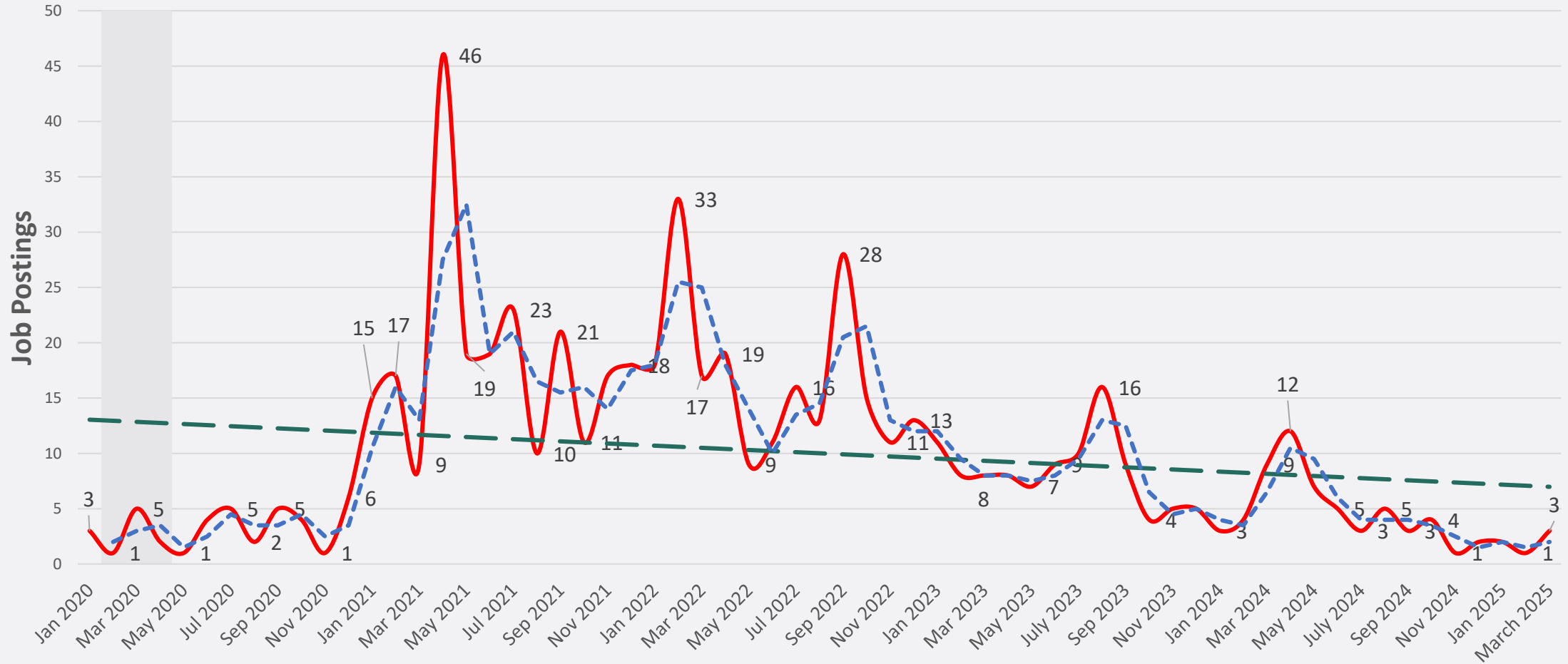
Section 03



Jobs Postings (Labor demand)

Agribusiness Cluster Jobs Postings Overview

- From January 2020 to March 2025, a total of 1,469 unique jobs postings happened in industries within the Agribusiness cluster. The average monthly unique jobs postings was 24 per month.
- The median posting duration was 24 days. Posting intensity was 3:1.
- Percent change between **January 2020 and March 2025** was **0.0%**.
- 48 employers in Agribusiness and food processing cluster competed for talent during this period.
- Hourly median advertised salary was \$18.65 per hour (43% postings included salaries)
- Job postings were advertised in 28 different industries within ECIRPD Region. **Poultry Processing** and **Soft Drink Manufacturing** had more than 200 unique jobs postings during **January 2020 and March 2025**.
- Top companies in Agribusiness cluster posting jobs include Tyson Foods, PepsiCo, Café Valley Bakery, AdvancePierre Foods Holdings, The Coca-Cola Company, and Rural King.



- Unique jobs postings are not seasonally adjusted and hence may show seasonal effects. Jobs postings are in a recovery and growth mode following the COVID-19 induced recession (February 2020 to April 2020). There is a long-term declining trend.

Agribusiness Cluster Latest Unique Jobs Postings

**Latest 1-Month
Unique Jobs
Postings
February 2025 –
March 2025**



**Latest 12-Month
Unique Jobs
Postings
March 2024 –
March 2025**



Top Companies Postings

1. Tyson Foods
2. PepsiCo
3. Cafe Valley Bakery
4. AdvancePierre Foods Holdings
5. The Coca-Cola Company
6. Rural King
7. Bimbo Bakeries USA
8. The Andersons
9. Mondelez International
10. Keystone Cooperative

Top Industries

1. Poultry Processing
2. Soft Drink Manufacturing
3. Meat Processed from Carcasses
4. Frozen Cakes, Pies, and Other Pastries Manufacturing
5. Commercial Bakeries
6. Farm Supplies Merchant Wholesalers
7. Grain and Field Bean Merchant Wholesalers
8. Farm and Garden Machinery and Equipment Merchant Wholesalers
9. Cheese Manufacturing
10. Tobacco Manufacturing

- Farmers, farm hand and manual worker jobs advertisements are based on analog and not online services.

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