

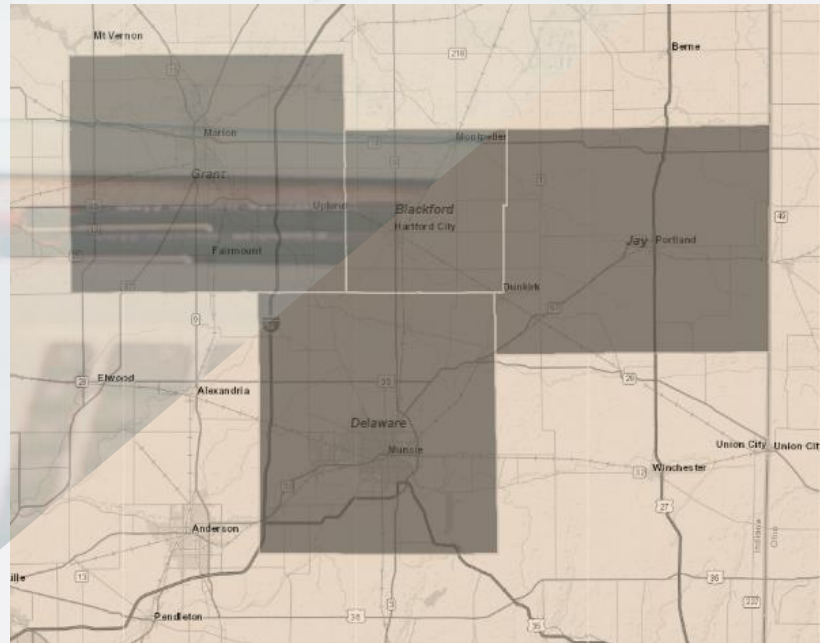
East Central Indiana Regional Planning District

Chemicals 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)	1,737 (1.6%)
Job change 2018-2023 (#, %)	+ 310 (22%)
Average total earnings per job 2023	\$78,347
Cost of Living (COL)	93.2
Est. Establishment 2023 (% of total est.)	44 (1%)
GRP (Gross Regional Product) 2023	\$404.3 Million
GRP per job 2023 (productivity)	\$ 232,757
Total purchases 2023	\$389.3 Million
<i>Within region</i>	20%
<i>Imported from outside of region & state</i>	80%
Number of sectors present in chemicals cluster	30

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)
All Other Plastics Product Manufacturing	427	27	-28	-1	119	120 
Glass Container Manufacturing	395	26	-63	-37	102	139 
Plastics Bottle Manufacturing	208	11	-5	6	81	76 
Plastics Bag and Pouch Manufacturing	113	8	4	12	18	6 
Ready-Mix Concrete Manufacturing	62	6	-2	4	-6	-10
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	61	4	-4	-1	20	21 
Plastics Pipe and Pipe Fitting Manufacturing	54	4	2	5	10	4 
Polystyrene Foam Product Manufacturing	47	9	-21	-11	-59	-48
Ethyl Alcohol Manufacturing	38	5	-7	-3	-15	-12
Petroleum Bulk Stations and Terminals	37	4	-2	2	-12	-14
Unlaminated Plastics Profile Shape Manufacturing	34	4	-7	-3	-9	-6
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers	34	2	-1	1	14	13 
Other Chemical and Allied Products Merchant Wholesalers	31	4	-2	1	-11	-12
Urethane and Other Foam Product (except Polystyrene) Manufacturing	18	3	-3	0	-13	-13
Pharmaceutical Preparation Manufacturing	<10	3	1	4	Insf. Data	-38

Note: Upward arrow (↑) indicates regional competitiveness.

Shift-Share Analysis 2023

Industries that Outperformed

- All Other Plastics Product Manufacturing
- Glass Container Manufacturing
- Plastics Bottle Manufacturing
- Plastics Bag and Pouch Manufacturing
- Plastics Pipe and Pipe Fitting Manufacturing
- Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
- Plastics Materials and Basic Forms and Shapes Merchant Wholesalers

○ A few relatively strong industry sectors include All Other Plastics Product Manufacturing with 400 plus jobs and Glass Container Manufacturing with almost 400 jobs in 2023.

○ All Other Plastics Product Manufacturing and Glass Container Manufacturing have large competitive shift values of +120 and +139, respectively.

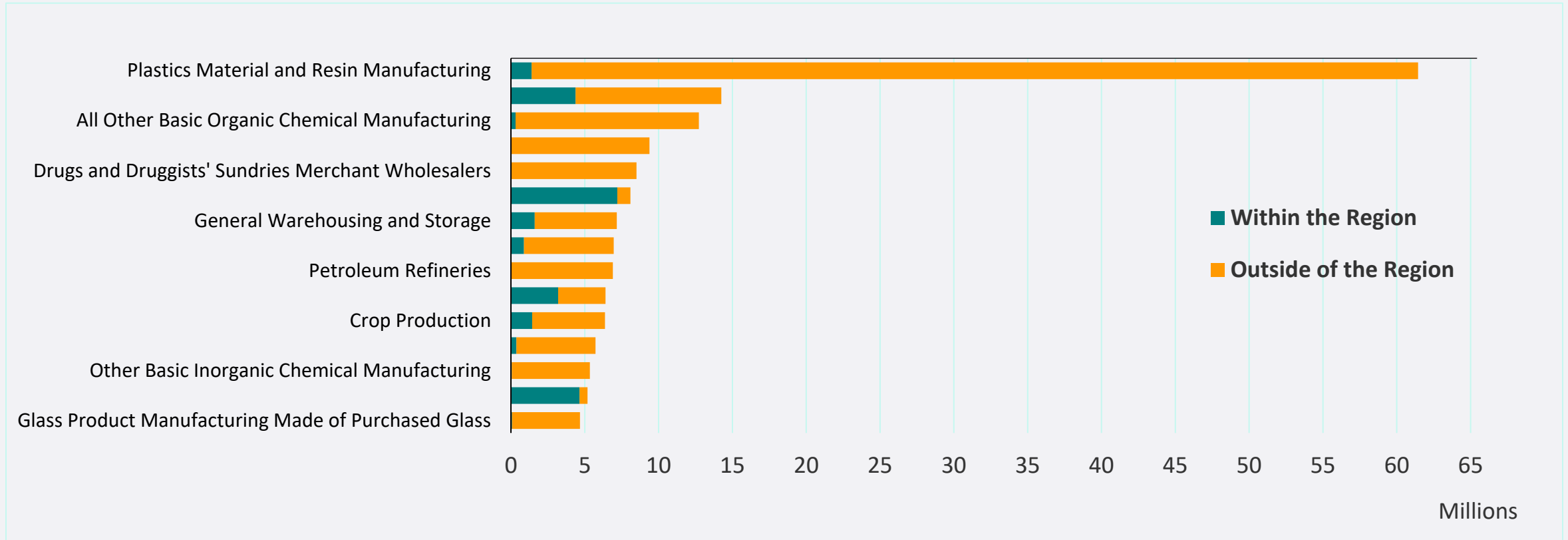
Industries that Underperformed

- Polystyrene Foam Product Manufacturing
- Ready-Mix Concrete Manufacturing
- Ethyl Alcohol Manufacturing
- Petroleum Bulk Stations and Terminals
- Unlaminated Plastics Profile Shape Manufacturing
- Other Chemical and Allied Products Merchant Wholesalers
- Pharmaceutical Preparation Manufacturing
- Urethane and Other Foam Product (except Polystyrene) Manufacturing

Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Million), 2023	% In-Region	% Out of Region
Plastics Material and Resin Manufacturing	\$61,440,396	2.3%	97.7%
Corporate, Subsidiary, and Regional Managing Offices	\$14,250,847	30.7%	69.3%
All Other Basic Organic Chemical Manufacturing	\$12,724,571	2.5%	97.5%
Petrochemical Manufacturing	\$9,378,208	0.0%	100.0%
Drugs and Druggists' Sundries Merchant Wholesalers	\$8,501,321	0.5%	99.5%
Electric Power Distribution	\$8,091,519	89.1%	10.9%
General Warehousing and Storage	\$7,163,947	22.5%	77.5%
All Other Plastics Product Manufacturing	\$6,955,176	12.7%	87.3%
Petroleum Refineries	\$6,900,317	0.0%	100.0%
Rail transportation	\$6,400,943	49.9%	50.1%
Crop Production	\$6,364,399	22.6%	77.4%
Corrugated and Solid Fiber Box Manufacturing	\$5,722,619	6.4%	93.6%
Other Basic Inorganic Chemical Manufacturing	\$5,345,930	1.0%	99.0%
General Freight Trucking, Long-Distance, Truckload	\$5,184,680	89.6%	10.4%
Glass Product Manufacturing Made of Purchased Glass	\$4,674,051	1.5%	98.5%

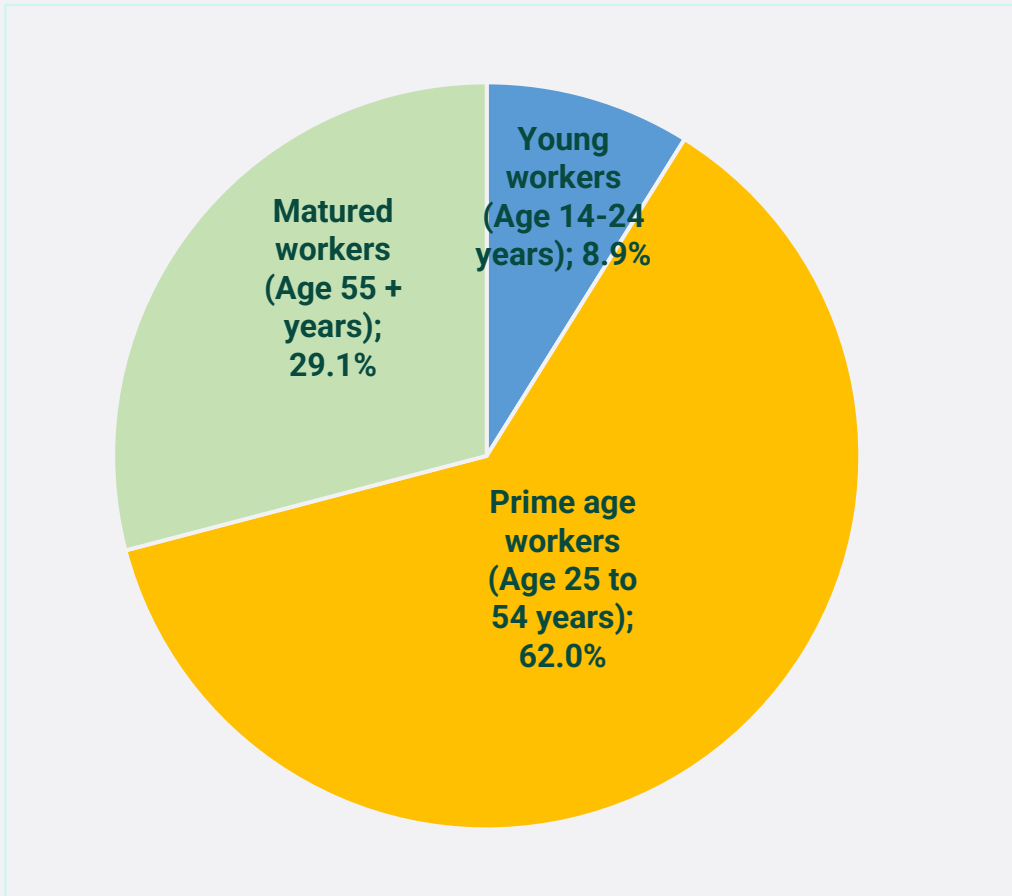
Leakage analysis 2023



- Seven industries rely on supply outside the region with more than 97%: a) **Plastics Material and Resin Manufacturing**, b) **All Other Basic Organic Chemical Manufacturing**, c) **Petrochemical Manufacturing**, d) **Drugs and Druggists' Sundries Merchant Wholesalers**, e) **Petroleum Refineries**, f) **Other Basic Inorganic Chemical Manufacturing**, and g) **Glass Product Manufacturing Made of Purchased Glass**.

Occupations	Jobs 2023	% Change 2018-2023	% of Total Jobs in Cluster 2023	Median Hour Earnings	Entry level Education	Automation
Miscellaneous Assemblers and Fabricators	142	73%	8.2%	\$20.31	High school diploma or equivalent	112.6
Heavy and Tractor-Trailer Truck Drivers	107	38%	6.2%	\$25.37	Postsecondary nondegree award	110.1
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	102	39%	5.9%	\$18.01	High school diploma or equivalent	117
Laborers and Freight, Stock, and Material Movers, Hand	81	39%	4.7%	\$16.79	No formal educational credential	117.2
First-Line Supervisors of Production and Operating Workers	76	33%	4.4%	\$29.07	High school diploma or equivalent	88.6
Inspectors, Testers, Sorters, Samplers, and Weighers	59	48%	3.4%	\$21.10	High school diploma or equivalent	106.1
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	55	8%	3.2%	\$29.54	High school diploma or equivalent	91.5
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	52	40%	3.0%	\$20.46	High school diploma or equivalent	116.6
Molders, Shapers, and Casters, Except Metal and Plastic	45	17%	2.6%	\$20.74	High school diploma or equivalent	121
Industrial Machinery Mechanics	44	57%	2.6%	\$28.72	High school diploma or equivalent	109.8
Packers and Packagers, Hand	43	-16%	2.5%	\$15.75	No formal educational credential	123.1
Packaging and Filling Machine Operators and Tenders	43	23%	2.5%	\$20.89	High school diploma or equivalent	116.9
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	42	57%	2.4%	\$21.71	High school diploma or equivalent	115.9
Industrial Truck and Tractor Operators	41	43%	2.4%	\$20.92	No formal educational credential	119.5
Maintenance and Repair Workers, General	36	-1%	2.1%	\$21.62	High school diploma or equivalent	109.6

Worker demographics 2023



- Hispanic workers (3%)
- Black or African-American workers (3%)
- Asian workers (1%)
- White workers (91%)
- American Indian or Alaska Native (0.09%)
- Others (2%)

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

- Almost 30% workers are matured (aged 55 years or more) workers in ECIRPD in this cluster. Young workers are only 8.9% of the labor force. Talent pipeline strategies are needed for retiring workforce.

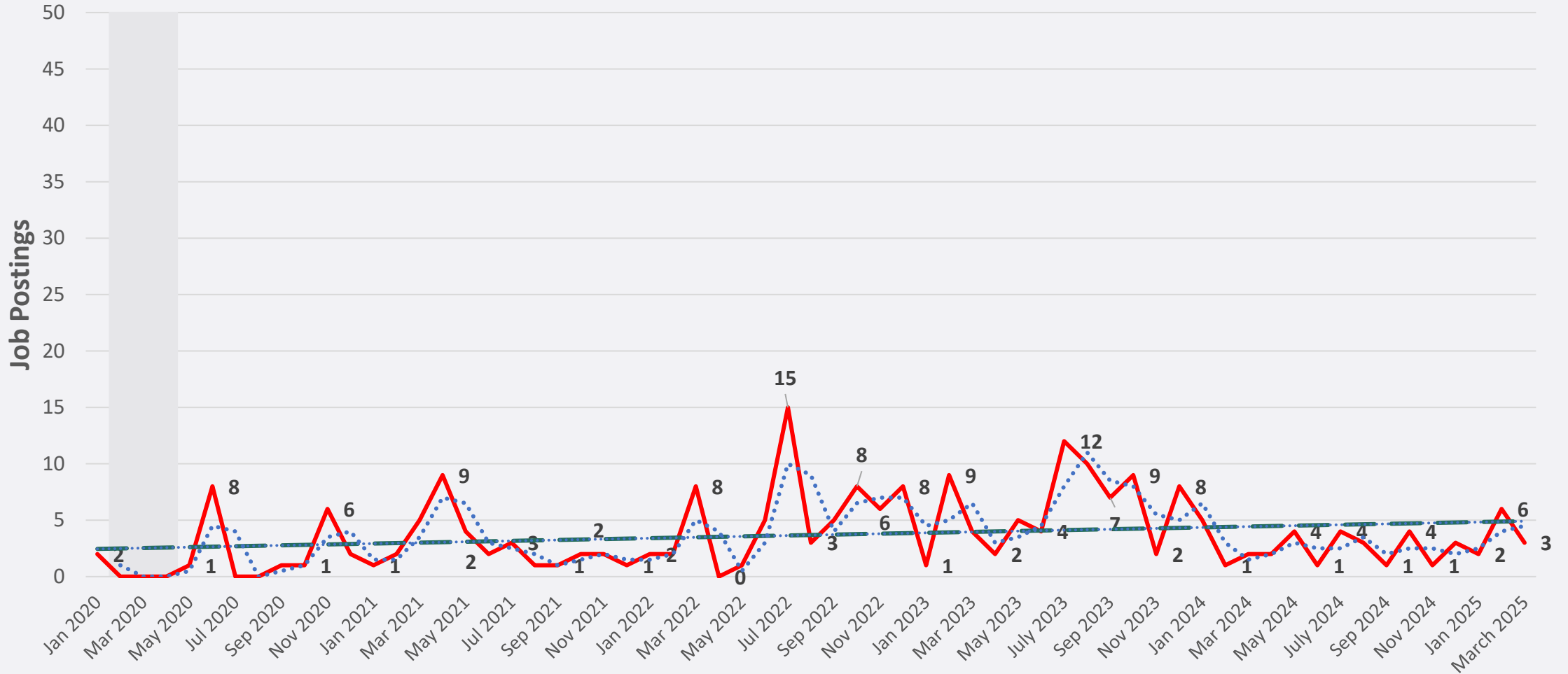
Section 03



Jobs Postings (Labor demand)

Chemical Cluster Jobs Postings Overview

- From January 2020 to March 2025, a total of 1,072 unique jobs postings happened in industries within the chemical cluster. The average monthly unique jobs postings was 18 per month.
- The median posting duration was 29 days. Posting intensity was 2:1.
- Percent change between **January 2020 and March 2025** was **+33%**.
- 70 employers in Chemical cluster competed for talent during this period.
- Hourly median advertised salary was \$26.03 per hour (22% postings included salaries)
- Job postings were advertised in 31 different industries within ECIRPD Region. **Pharmaceutical Preparation Manufacturing, Biological Product (except Diagnostic) Manufacturing, and Abrasive Product Manufacturing.** had more than 200 unique jobs postings during **January 2020 and March 2025.**
- Top companies in Chemicals cluster posting jobs include Pfizer, CSL, Crossmed, 3M, Marathon Petroleum, and Sherwin-Williams.



- 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).

Chemical 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. Pfizer
2. CSL
3. Crossmed
4. 3M
5. Marathon Petroleum
6. Sherwin-Williams
7. Takeda Pharmaceutical Company
8. Petoskey Plastics
9. Spartech Corporation
10. Priority Plastics

Top Industries

1. Pharmaceutical Preparation Manufacturing
2. Biological Product (except Diagnostic) Manufacturing
3. Abrasive Product Manufacturing
4. Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing
5. Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
6. Paint and Coating Manufacturing
7. Other Chemical and Allied Products Merchant Wholesalers
8. Petroleum Bulk Stations and Terminals
9. Plastics Material and Resin Manufacturing
10. Plastics Materials and Basic Forms and Shapes Merchant Wholesalers

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

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