

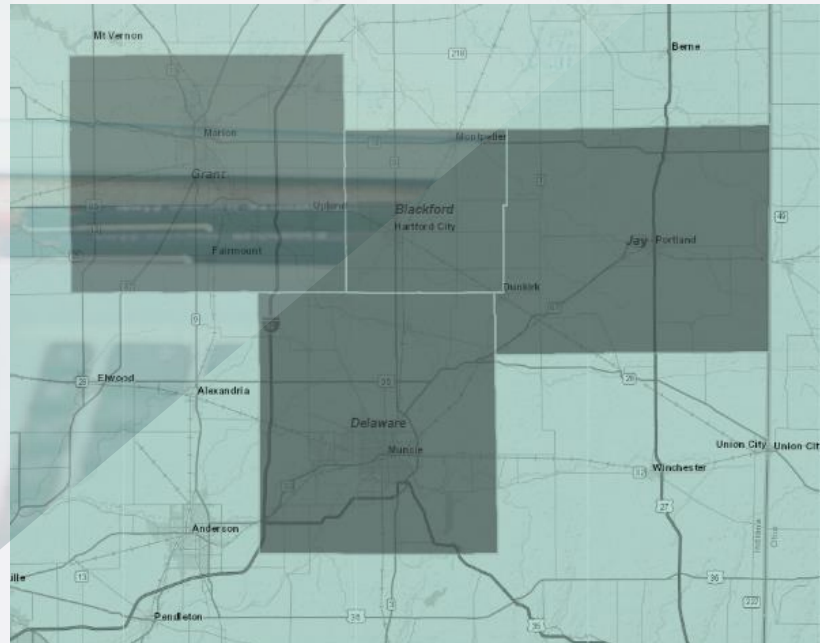
East Central Indiana Regional Planning District

Primary Metals 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)	589 (Less than 1%)
Job change 2018-2023 (#, %)	+100 (20%)
Average total earnings per job 2023	\$79,362
Cost of Living (COL)	93.2
Establishment 2023 (% of total est.)	10 (Less than 1%)
GRP (Gross Regional Product) 2023	\$ 102.6 Million
GRP per job 2023 (productivity)	\$174,193
Total purchases 2023	\$119.2 Million
<i>Within region</i>	20%
<i>Imported from outside of region & state</i>	80%
Number of sectors in primary metals cluster	9

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)
Iron Foundries	188	15	-31	-16	16	32 
Nonferrous Metal Die-Casting Foundries	160	2	-5	-3	138	141 
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)	158	14	-15	-1	3	5 
Aluminum Foundries (except Die-Casting)	75	9	-20	-11	-31	-20
Copper Rolling, Drawing, Extruding, and Alloying	<10	3	-2	1	Insf. Data	-30
Other Nonferrous Metal Foundries (except Die-Casting)	<10	0	0	0	Insf. Data	-1
Iron and Steel Mills and Ferroalloy Manufacturing	<10	0	0	0	Insf. Data	2 
Aluminum Sheet, Plate, and Foil Manufacturing	<10	0	0	0	Insf. Data	3 
Other Aluminum Rolling, Drawing, and Extruding	<10	0	0	0	Insf. Data	0

Note: Upward arrow  indicates regional competitiveness.

Shift-Share Analysis 2023

Industries that Outperformed

- Iron Foundries
- Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)
- Nonferrous Metal Die-Casting Foundries
- Iron and Steel Mills and Ferroalloy Manufacturing
- Aluminum Sheet, Plate, and Foil Manufacturing

Industries that Underperformed

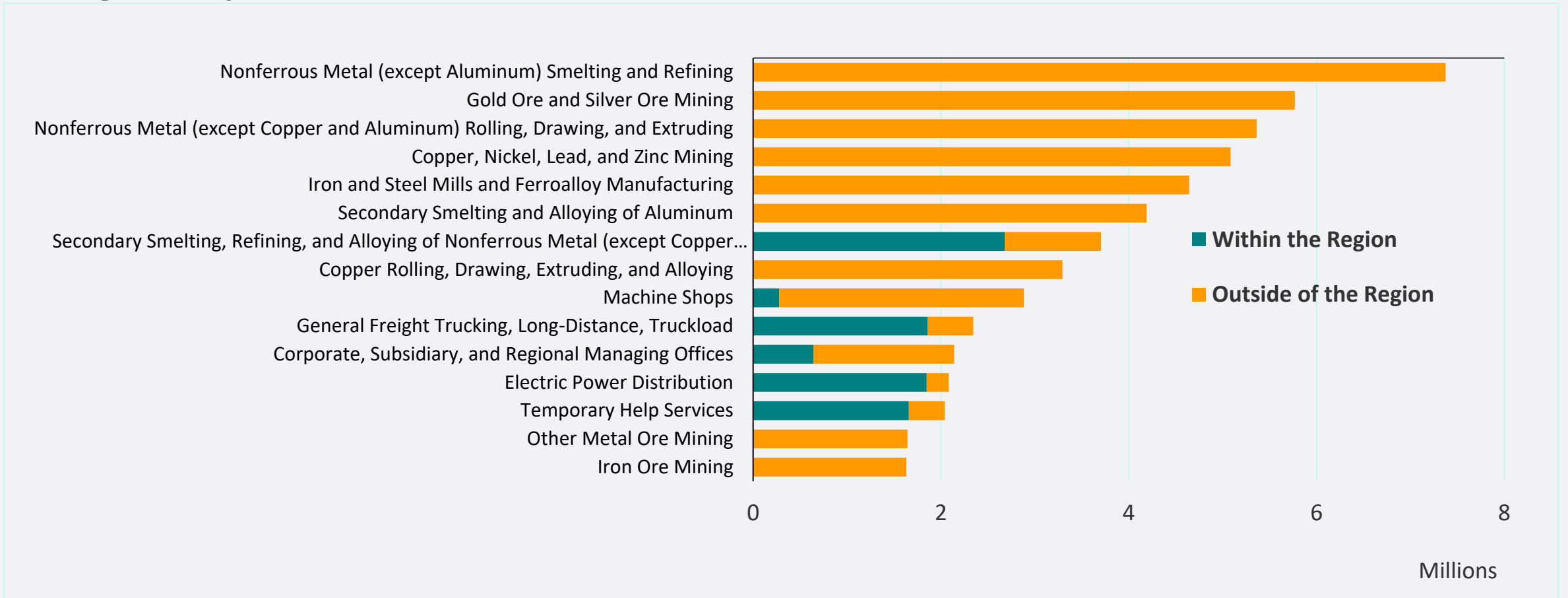
- Aluminum Foundries (except Die-Casting)
- Copper Rolling, Drawing, Extruding, and Alloying
- Other Nonferrous Metal Foundries (except Die-Casting)
- Other Aluminum Rolling, Drawing, and Extruding

- A few strong industry sectors include Iron Foundries, Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum), and Nonferrous Metal Die-Casting Foundries with 150 plus jobs in 2023.
- Nonferrous Metal Die-Casting Foundries has a large competitive shift/regional performance value of +141.

Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Million), 2023	% In-Region	% Out of Region
Nonferrous Metal (except Aluminum) Smelting and Refining	\$7,374,255	0.0%	100.0%
Gold Ore and Silver Ore Mining	\$5,768,467	0.0%	100.0%
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding	\$5,362,281	0.0%	100.0%
Copper, Nickel, Lead, and Zinc Mining	\$5,083,595	0.0%	100.0%
Iron and Steel Mills and Ferroalloy Manufacturing	\$4,643,697	0.1%	99.9%
Secondary Smelting and Alloying of Aluminum	\$4,190,479	0.0%	100.0%
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)	\$3,703,404	72.3%	27.7%
Copper Rolling, Drawing, Extruding, and Alloying	\$3,294,098	0.1%	99.9%
Machine Shops	\$2,883,435	9.6%	90.4%
General Freight Trucking, Long-Distance, Truckload	\$2,343,504	79.3%	20.7%
Corporate, Subsidiary, and Regional Managing Offices	\$2,140,061	29.9%	70.1%
Electric Power Distribution	\$2,084,292	88.7%	11.3%
Temporary Help Services	\$2,041,599	81.2%	18.8%
Other Metal Ore Mining	\$1,643,759	0.4%	99.6%
Iron Ore Mining	\$1,631,492	0.0%	100.0%

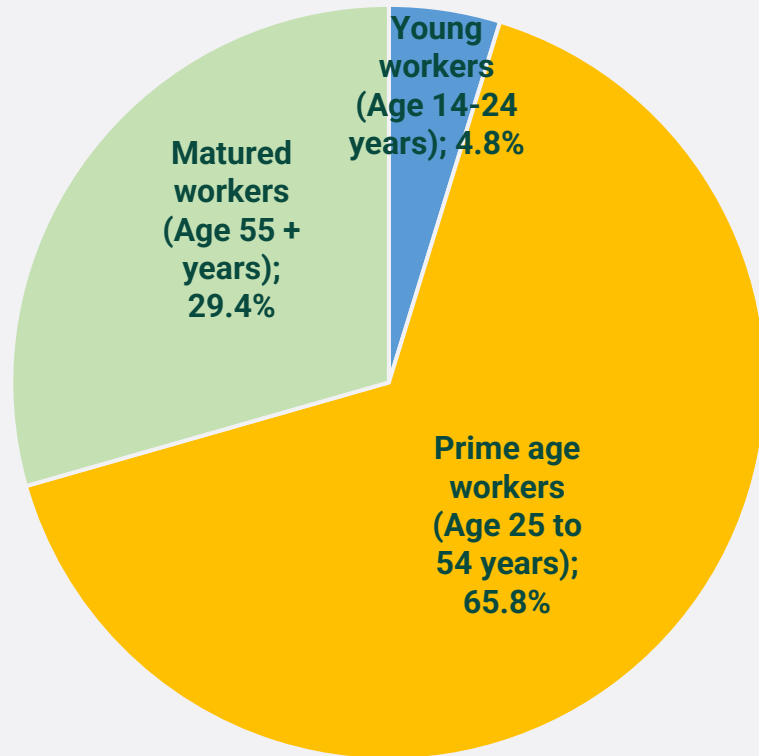
Leakage analysis 2023



- Six industries rely entirely on supply outside the region: a) Nonferrous Metal (except Aluminum) Smelting and Refining, b) Gold Ore and Silver Ore Mining, c) Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding, d) Copper, Nickel, Lead, and Zinc Mining, e) Secondary Smelting and Alloying of Aluminum, and f) Iron Ore Mining.

Occupations	Jobs 2023	% Change 2018-2023	% of Total Jobs in Cluster 2023	Median Hour Earnings	Entry level Education	Automation
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	47	96%	8.0%	\$18.01	High school diploma or equivalent	117
Foundry Mold and Coremakers	42	-18%	7.2%	\$18.43	High school diploma or equivalent	126.5
First-Line Supervisors of Production and Operating Workers	33	35%	5.7%	\$29.07	High school diploma or equivalent	88.6
Inspectors, Testers, Sorters, Samplers, and Weighers	29	42%	4.9%	\$21.10	High school diploma or equivalent	106.1
Metal-Refining Furnace Operators and Tenders	28	313%	4.7%	\$24.11	High school diploma or equivalent	117.4
Industrial Machinery Mechanics	26	89%	4.5%	\$28.72	High school diploma or equivalent	109.8
Tool and Die Makers	22	60%	3.7%	\$28.64	Postsecondary nondegree award	120.2
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	21	0%	3.5%	\$19.12	High school diploma or equivalent	119
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	19	48%	3.3%	\$21.71	High school diploma or equivalent	115.9
Pourers and Casters, Metal	19	242%	3.2%	\$21.33	High school diploma or equivalent	121.1
Machinists	19	-2%	3.2%	\$22.23	High school diploma or equivalent	115.2
Laborers and Freight, Stock, and Material Movers, Hand	19	75%	3.2%	\$16.79	No formal educational credential	117.2
Miscellaneous Assemblers and Fabricators	17	107%	2.9%	\$20.31	High school diploma or equivalent	112.6
Maintenance and Repair Workers, General	15	-21%	2.5%	\$21.62	High school diploma or equivalent	109.6
Industrial Engineers	14	27%	2.4%	\$38.22	Bachelor's degree	92

Worker demographics 2023



- Hispanic workers (3%)
- Black or African-American workers (9%)
- Asian workers (1%)
- White workers (86%)
- American Indian or Alaska Native (0%)
- Others (1%)

- Male workers (86%)
- Female workers (14%)

- Slightly more than one in four workers (29.4%) are matured (aged 55 years or more) workers in ECIRPD in this cluster. Young workers are only 4.8% of the labor force. Talent pipeline strategies are needed!

Section 03



Jobs Postings (Labor demand)

Primary Metals Cluster Jobs Postings Overview

- From January 2020 to March 2025, a total of 98 unique jobs postings happened in industries within the Primary Metals cluster. The average monthly unique jobs postings was 1 per month.
- The median posting duration was 30 days. Posting intensity was 3:1.
- Percent change between **January 2020 and March 2025** was **0%**.
- 6 employers in Primary Metals cluster competed for talent during this period.
- Hourly median advertised salary was \$17.97 per hour (53% postings included salaries)
- Job postings were advertised in 19 different industries within ECIRPD Region. **Nonferrous Metal Die-Casting Foundries** and **Iron Steel Pipe and Tube Manufacturing from Purchased Steel** had more than 10 unique jobs postings during **January 2020 and March 2025**.
- Top companies in Primary Metals cluster posting jobs include Fort Recovery Industries, Tru-Form Steel & Wire, and Indiana Bridge.

Primary Metals 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. Tru-Form Steel & Wire
2. Fort Recovery Industries
3. Indiana Bridge
4. Steel Dynamics
5. Reynolds Consumer Products
6. Swan Transportation

Top Industries

1. Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
2. Nonferrous Metal Die-Casting Foundries
3. Iron and Steel Mills and Ferroalloy Manufacturing
4. Aluminum Sheet, Plate, and Foil Manufacturing
5. Iron Foundries

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