

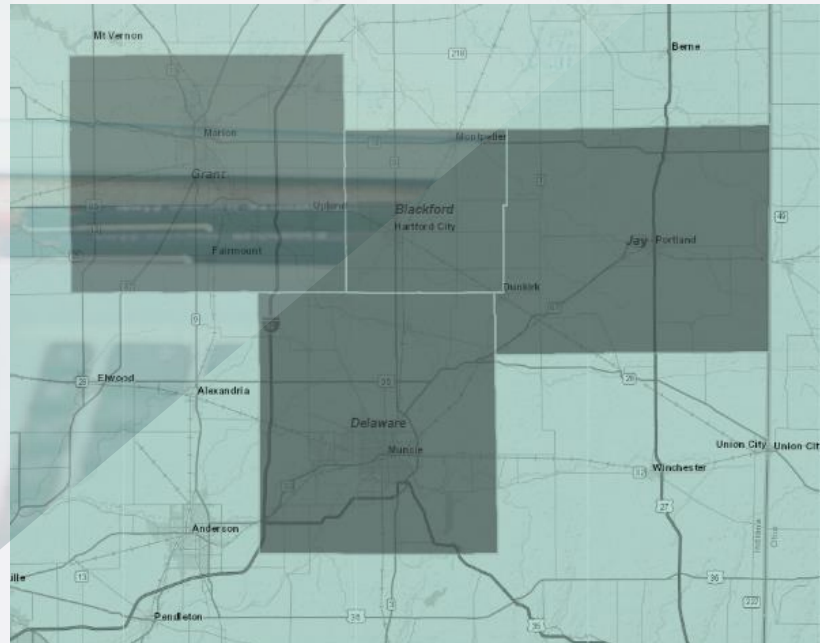
# East Central Indiana Regional Planning District

## Transportation and Logistics Cluster Drill-down

Section 01



### Economic indicators



<b>Economic Indicators</b>	<b>East Central Indiana Regional Planning District (QCEW, non-QCEW, self-employed and proprietors)</b>
Jobs 2023 (% of total jobs)	<b>5,734 (5%)</b>
Job change 2018-2023 (#, %)	<b>+1,096 (24%)</b>
Average total earnings per job 2023	<b>\$54,239</b>
Cost of Living (COL)	<b>93.2</b>
Est. Establishment 2023 (% of total est.)	<b>115 (2.7%)</b>
GRP (Gross Regional Product) 2023	<b>\$420.9 Million</b>
GRP per job 2023 (productivity)	<b>\$73,408</b>
Total purchases 2023	<b>\$332.2 Million</b>
<i>Within region</i>	<b>36%</b>
<i>Imported from outside of region &amp; state</i>	<b>64%</b>
Number of sectors in transportation and logistics cluster	<b>33</b>

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)
General Warehousing and Storage	2,326	166	1150	1315	429	-886
Couriers and Express Delivery Services	782	23	403	427	516	89 
General Freight Trucking, Long-Distance, Truckload	526	72	81	153	-294	-447
Local Messengers and Local Delivery	375	4	150	155	324	169 
General Freight Trucking, Long-Distance, Less Than Truckload	371	25	-5	19	88	68 
Process, Physical Distribution, and Logistics Consulting Services	272	12	21	33	139	106 
General Freight Trucking, Local	264	17	28	45	67	22 
Specialized Freight (except Used Goods) Trucking, Local	215	18	-11	7	4	-3
Rail transportation	154	16	-46	-30	-30	0
Packaging and Labeling Services	143	27	3	30	-171	-202
Motor Vehicle Towing	110	8	0	8	20	12 
All Other Transit and Ground Passenger Transportation	35	5	-16	-12	-19	-7
Specialized Freight (except Used Goods) Trucking, Long-Distance	30	2	-2	0	3	3 
Freight Transportation Arrangement	20	2	1	3	0	-3
Other Airport Operations	11	3	3	5	-19	-25

Note: Upward arrow  indicates regional competitiveness.

## Shift-Share Analysis 2023

### Industries that Outperformed

- General Freight Trucking, Long-Distance, Less Than Truckload
- Couriers and Express Delivery Services
- General Freight Trucking, Local
- Process, Physical Distribution, and Logistics Consulting Services
- Motor Vehicle Towing
- Local Messengers and Local Delivery
- Specialized Freight (except Used Goods) Trucking, Long-Distance

- A few strong industry sectors include General Warehousing and Storage with over 2000 jobs and Couriers and Express Delivery Services with 700 plus jobs in 2023.
- Local Messengers and Local Delivery, and Process, Physical Distribution, and Logistics Consulting Services have competitive shift values of +169 and +106, respectively.

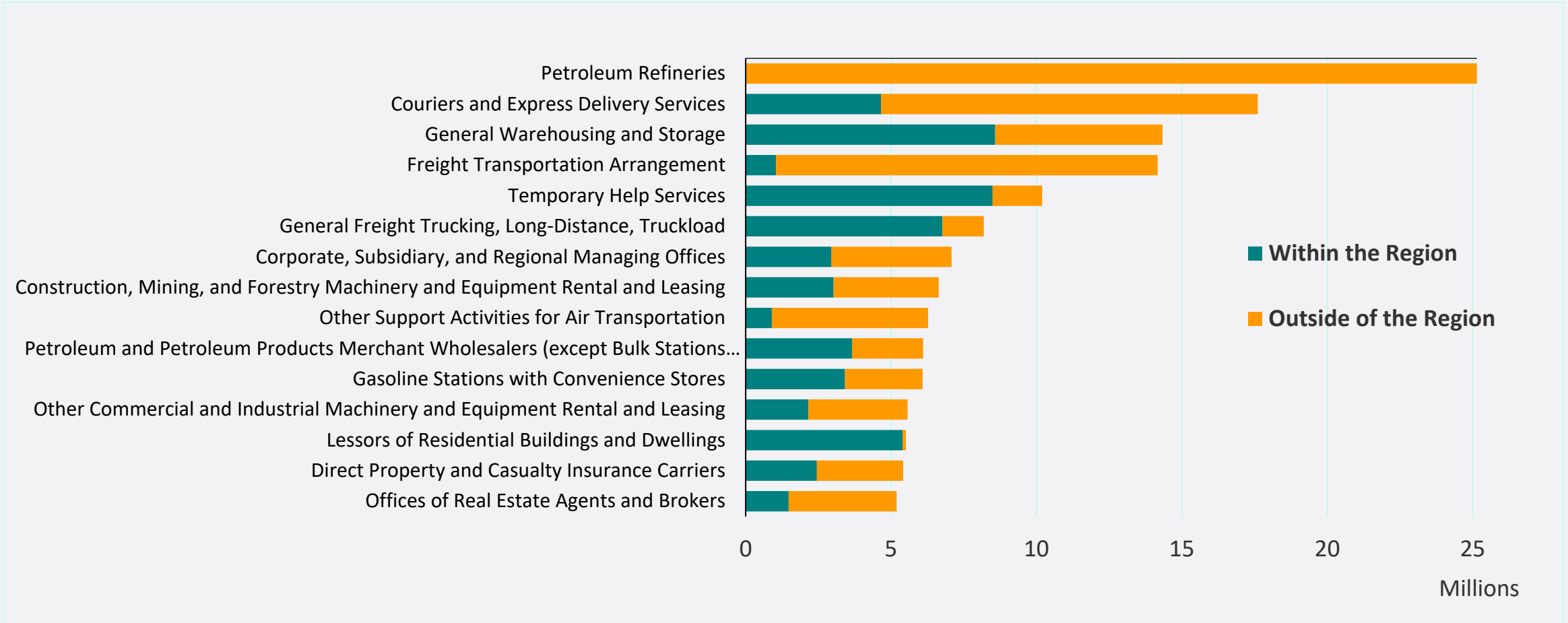
### Industries that Underperformed

- General Warehousing and Storage
- General Freight Trucking, Long-Distance, Truckload
- Packaging and Labeling Services
- Specialized Freight (except Used Goods) Trucking, Local
- All Other Transit and Ground Passenger Transportation
- Other Airport Operations
- Freight Transportation Arrangement

## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Million), 2023	% In-Region	% Out of Region
Petroleum Refineries	\$25,143,936	0.0%	100.0%
Couriers and Express Delivery Services	\$17,610,248	26.5%	73.5%
General Warehousing and Storage	\$14,332,859	59.9%	40.1%
Freight Transportation Arrangement	\$14,166,557	7.4%	92.6%
Temporary Help Services	\$10,198,772	83.3%	16.7%
General Freight Trucking, Long-Distance, Truckload	\$8,186,758	82.6%	17.4%
Corporate, Subsidiary, and Regional Managing Offices	\$7,081,199	41.7%	58.3%
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$6,638,823	45.5%	54.5%
Other Support Activities for Air Transportation	\$6,272,741	14.3%	85.7%
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$6,102,144	59.9%	40.1%
Gasoline Stations with Convenience Stores	\$6,082,677	56.2%	43.8%
Other Commercial and Industrial Machinery and Equipment Rental and Leasing	\$5,568,000	38.8%	61.2%
Lessors of Residential Buildings and Dwellings	\$5,508,279	98.0%	2.0%
Direct Property and Casualty Insurance Carriers	\$5,416,916	45.2%	54.8%
Offices of Real Estate Agents and Brokers	\$5,190,515	28.5%	71.5%

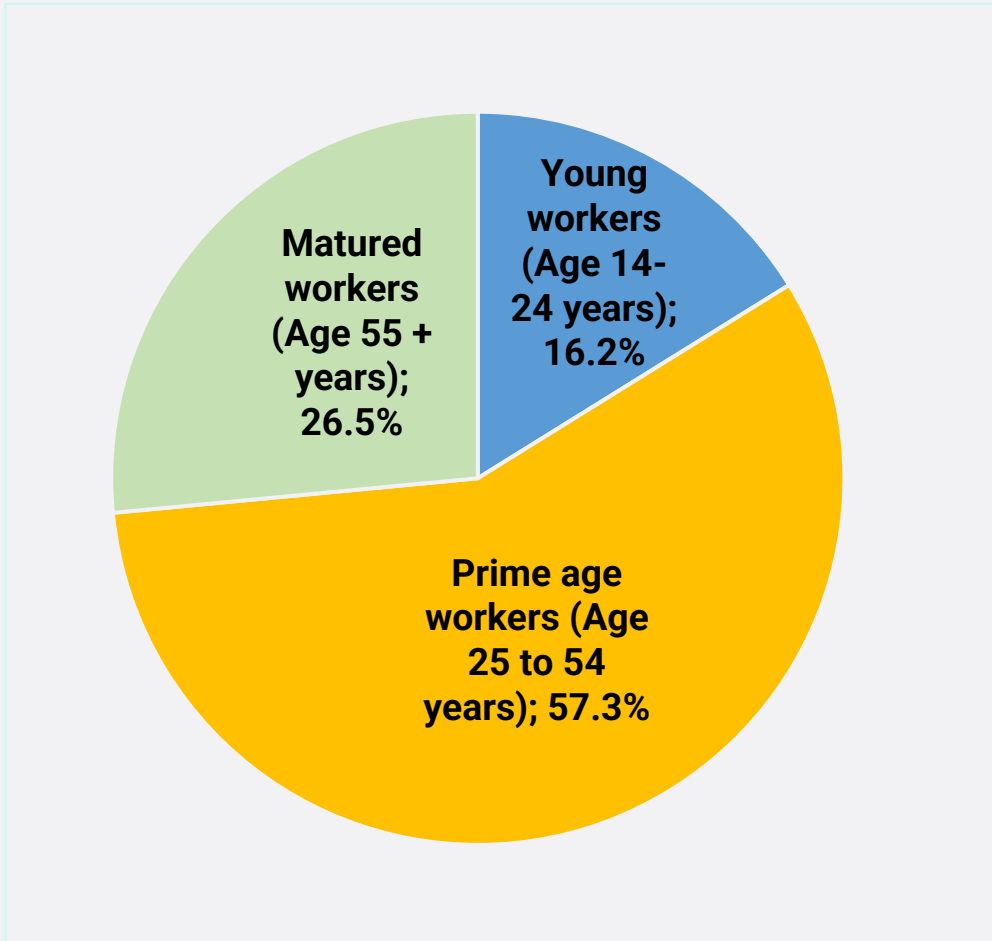
## Leakage analysis 2023



- Petroleum Refineries ranks the first and relies entirely on supply outside the region.

Occupations	Jobs 2023	% Change 2018-2023	% of Total Jobs in Cluster 2023	Median Hour Earnings	Entry level Education	Automation
Heavy and Tractor-Trailer Truck Drivers	1,145	-2%	20.0%	\$25.37	Postsecondary nondegree award	110.1
Couriers and Messengers	722	776%	12.6%	\$12.08	High school diploma or equivalent	105.3
Laborers and Freight, Stock, and Material Movers, Hand	683	7%	11.9%	\$16.79	No formal educational credential	117.2
Stockers and Order Fillers	559	198%	9.8%	\$16.50	High school diploma or equivalent	112.3
Industrial Truck and Tractor Operators	517	19%	9.0%	\$20.92	No formal educational credential	119.5
Light Truck Drivers	293	52%	5.1%	\$17.82	High school diploma or equivalent	112.9
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	114	-20%	2.0%	\$26.44	High school diploma or equivalent	93.8
Packers and Packagers, Hand	110	-33%	1.9%	\$15.75	No formal educational credential	123.1
Shipping, Receiving, and Inventory Clerks	96	-3%	1.7%	\$19.59	High school diploma or equivalent	109.1
Office Clerks, General	75	-27%	1.3%	\$17.84	High school diploma or equivalent	102
Bus and Truck Mechanics and Diesel Engine Specialists	72	-10%	1.2%	\$26.44	High school diploma or equivalent	114.6
General and Operations Managers	66	12%	1.1%	\$44.48	Bachelor's degree	82.2
Managers, All Other	62	116%	1.1%	\$21.89	Bachelor's degree	84.5
Dispatchers, Except Police, Fire, and Ambulance	50	-14%	0.9%	\$19.30	High school diploma or equivalent	95.1
Maintenance and Repair Workers, General	46	-17%	0.8%	\$21.62	High school diploma or equivalent	109.6

## Worker demographics 2023



- Hispanic workers (6%)
- Black or African-American workers (9%)
- Asian workers (1%)
- White workers (81%)
- American Indian or Alaska Native (0.31%)
- Others (3%)
  
- Male workers (63%)
- Female workers (37%)

- Slightly more than one in four workers (27%) are matured (aged 55 years or more) workers in ECIRPD in this cluster. Young workers are 16.2% of the labor force, proportionately higher share than other clusters.

Section 03

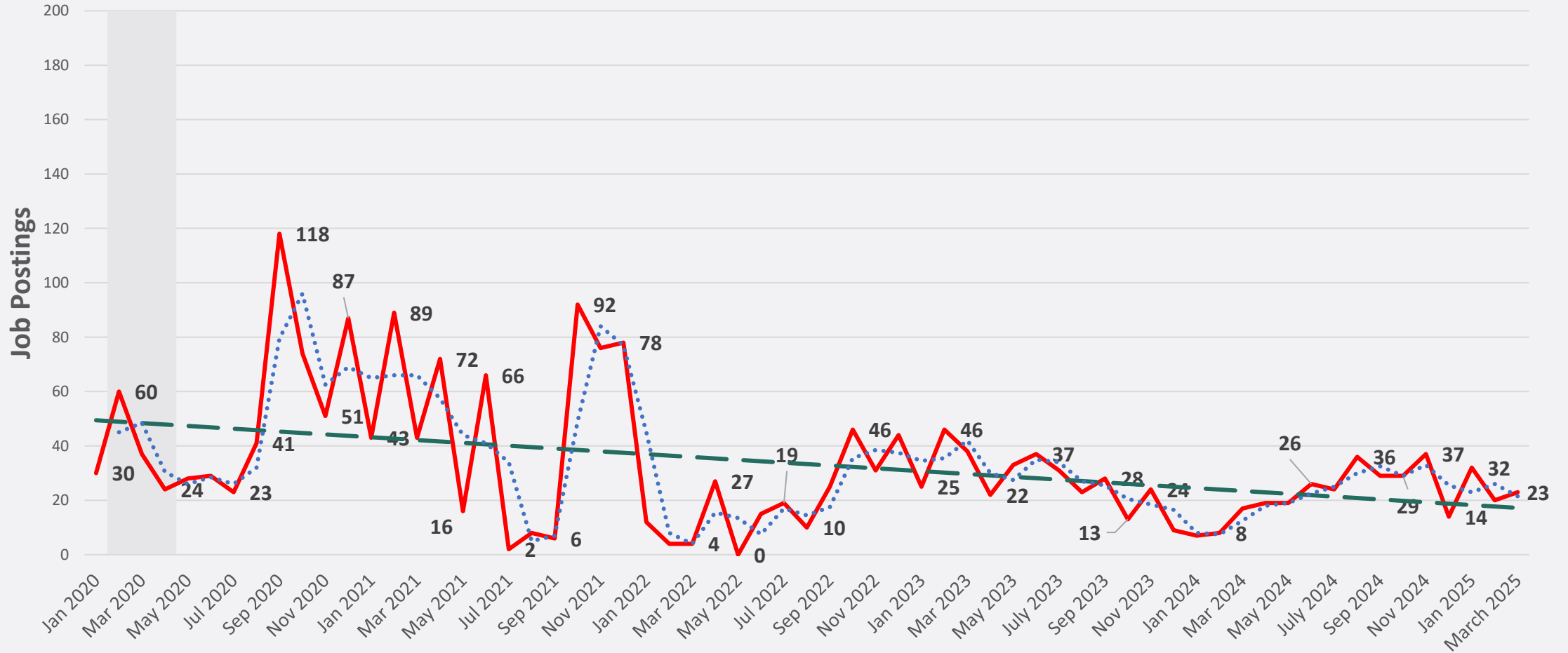


# Jobs Postings (Labor demand)

# Transportation and Logistics Cluster Jobs Postings Overview

- From January 2020 to March 2025, a total of 3,534 unique jobs postings happened in industries within the Transportation and Logistics cluster. The average monthly unique jobs postings was 56 per month.
- The median posting duration was 27 days. Posting intensity was 4:1.
- Percent change between **January 2020 and March 2025** was **-23%**.
- 410 employers in Transportation and Logistics cluster competed for talent during this period.
- Hourly median advertised salary was \$33.66 per hour (59% postings included salaries)
- Job postings were advertised in 19 different industries within ECIRPD Region. **General Freight Trucking, Long-Distance, Truckload, General Freight Trucking, Local, and Specialized Freight (except Used Goods) Trucking, Long-Distance** had more than 300 unique jobs postings during **January 2020 and March 2025**.
- Top companies in Transportation and Logistics cluster posting jobs include Morrystown Express, UPS, US Xpress, Roehl Transport, Carter Express, and Penske Logistics.

# Transportation and Logistics Cluster: Job Postings Time Series (Jan 2020 to March 2025)

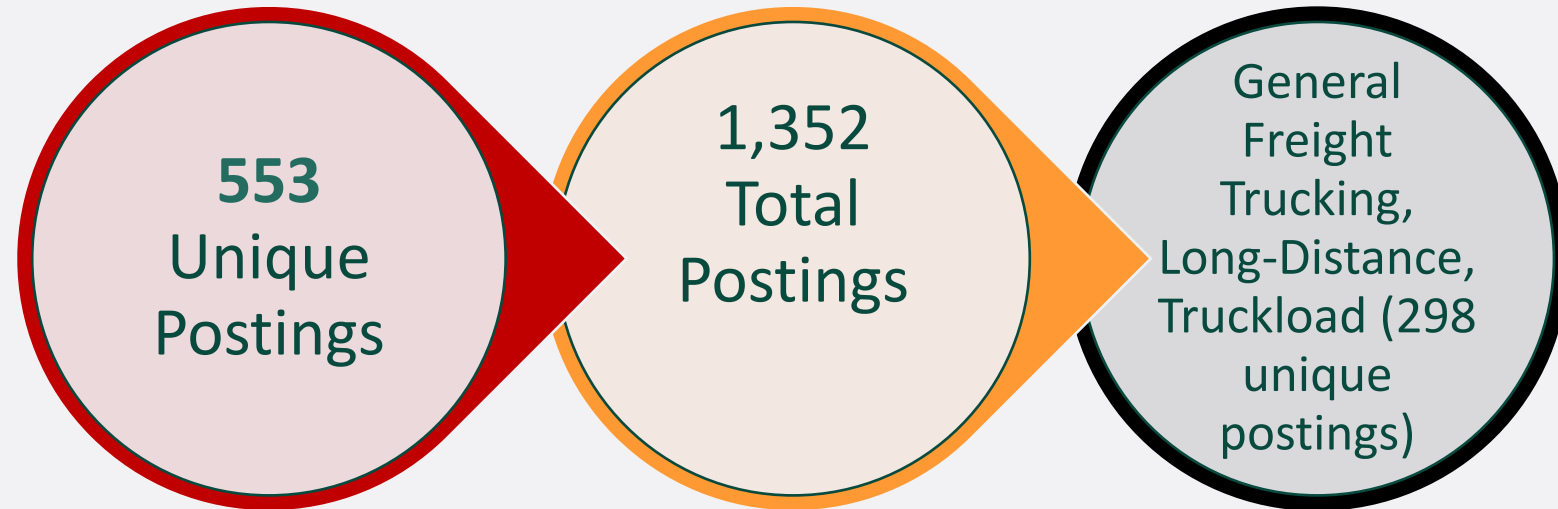


- Unique jobs postings are not seasonally adjusted and hence may show seasonal effects. Jobs postings are in a recovery and growth mode following the COVID-19 induced recession (February 2020 to April 2020).

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



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



## Top Companies Postings

1. Penske Logistics
2. Morristown Express
3. Fraley And Schilling
4. FirstFleet
5. US Xpress
6. Roehl Transport
7. Climate Express
8. Ascend
9. UPS
10. Carter Express

## Top Industries

1. General Freight Trucking, Long-Distance, Truckload
2. Process, Physical Distribution, and Logistics Consulting Services
3. General Freight Trucking, Local
4. Specialized Freight (except Used Goods) Trucking, Long-Distance
5. Freight Transportation Arrangement
6. Couriers and Express Delivery Services
7. Specialized Freight (except Used Goods) Trucking, Local
8. General Freight Trucking, Long-Distance, Less Than Truckload
9. General Warehousing and Storage
10. Used Household and Office Goods Moving

- Transportation and warehouse worker jobs advertisements could be based on analog and not online services.

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