

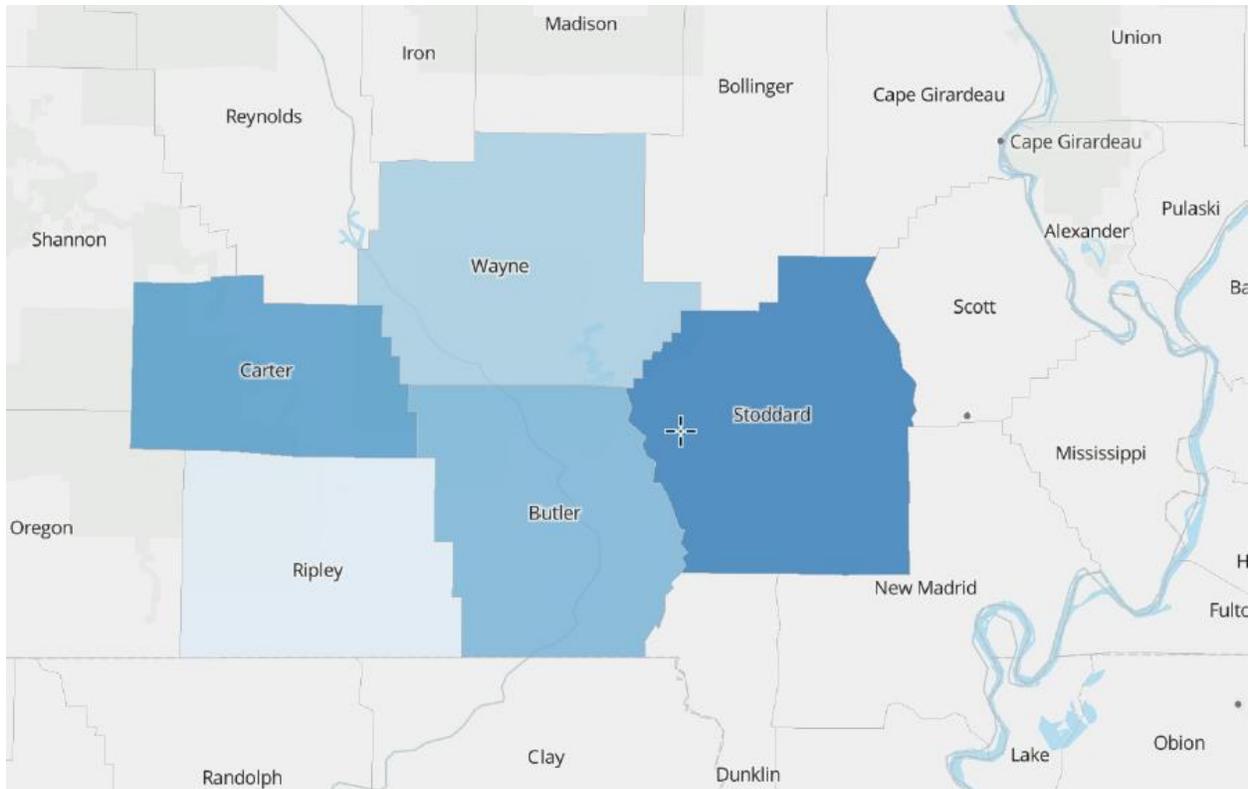
**Target Industry Study,
Labor Analysis and
Industrial Strategy
for
The Greater Poplar Bluff
Region**

September, 2020

Future Focus Development Solutions

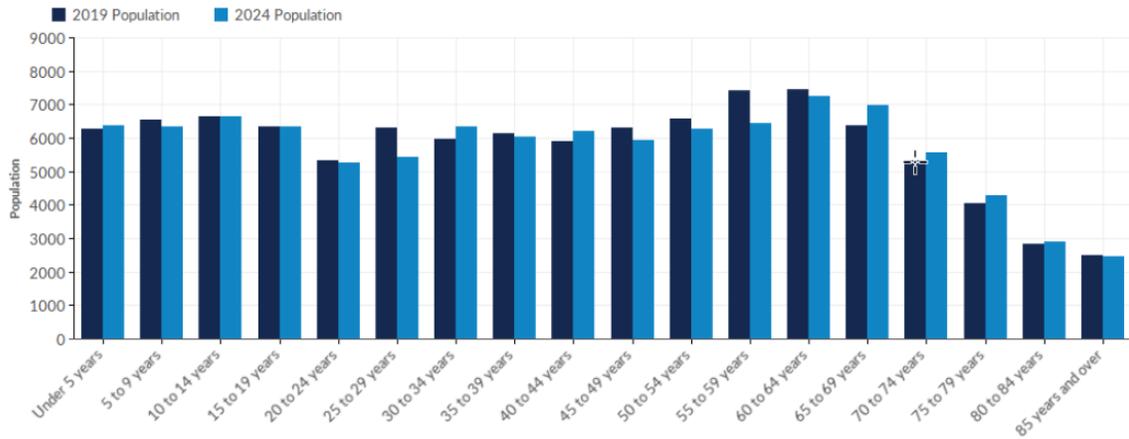
Introduction

Poplar Bluff, Mo., the county seat of Butler County, is the trade, health care and business center of a five-county area which comprises Butler County along with the surrounding counties of Carter, Ripley, Stoddard and Wayne. Together, the five counties make up Poplar Bluff's laborshed. The five counties' 2019 population was 104,195, down 2 percent since 2014, and the population is projected to drop to 102,998 by 2024, a one percent drop.



The age cohort is relatively even across the population in the 2019 numbers, and not overbalanced by older residents, as is often the case in small cities across the country (See Fig. 1). A potentially troubling trend in the 2024 projections shows marked decreases in the age cohort that falls between 20 and 29, which would normally ripple through the population in later years as well and could foreshadow a shortage of workforce in decades to come. This is an ongoing trend that should be watched; however, future developments such as downtown revitalization, enhanced rural broadband, increased employer presence, and upgraded educational opportunities could impact it.

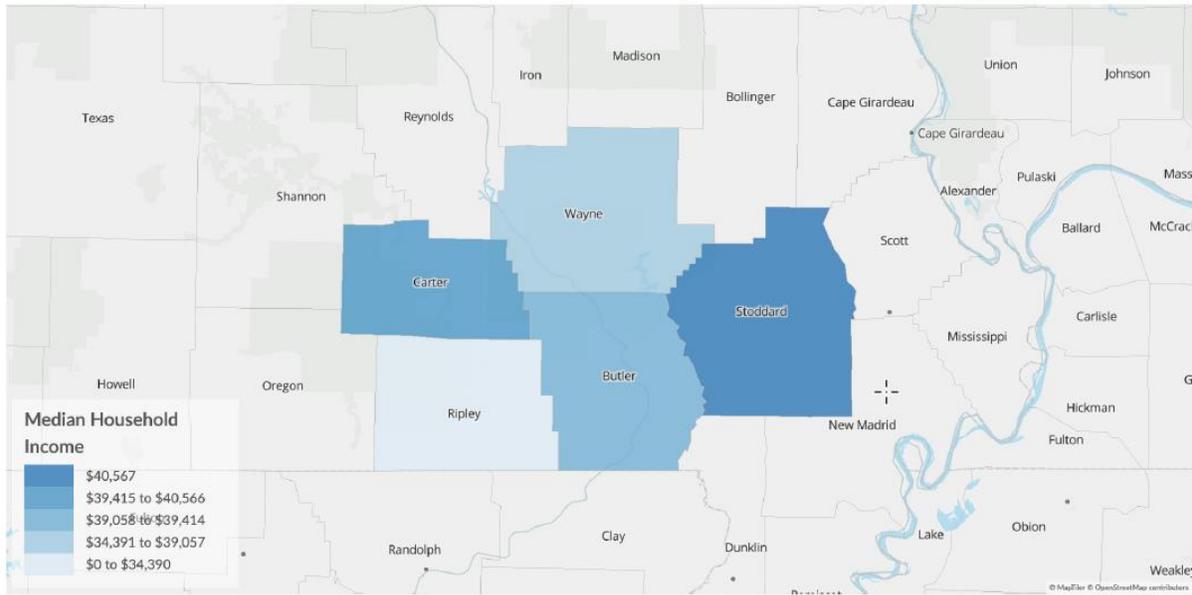
Population by Age Cohort



Median household income in the region ranges from \$33,343 to \$40,567, while per-capita income ranges from \$17,502 to \$22,205. The range of both is well below the Missouri average of \$50,147 PCI and the national average \$32,621 of per capita income, and the household income median of \$61,726 in Missouri and \$60,293 nationally. In 2019, of a total working age population of 84,742, a total of 44,190 were in the labor force and of those, 42,741 were employed. The labor force participation trend is about average in the central United States, and reflects an increase in labor force participation over the latter portion of 2019. The labor force participation rate of 52.15 percent is still below the 2014 rate of 53.38 percent.

Regionwide, 79.6 percent of the working age population holds a high school diploma or higher, while 8.6 percent holds a bachelor's degree. In general, the population's education level is in line with the education requirements of employers, although there is a need for more employees with high school diplomas and bachelor's degrees.

(See appendix 1 for other community and demographic data.)



County	County Name	Median Household Income	Per Capita Income	Mean Commute Time
29207	Stoddard County, MO	\$40,567	\$22,205	22.3
29035	Carter County, MO	\$39,415	\$21,884	28.1
29023	Butler County, MO	\$39,058	\$21,286	17.9
29223	Wayne County, MO	\$34,391	\$18,759	26.3
29181	Ripley County, MO	\$33,343	\$17,502	26.8

The three largest employers in the region are health care, government and manufacturing. In all three categories, there are more jobs in those sectors in the five-county region than the national average. It should be noted that the VA hospital employees are classified as government workers, not health care. The manufacturing location quotient is about 1.75 times the national average. Retail trade employment also outstrips the national average, indicative of Poplar Bluff’s status as a regional trade center. Major jobs growth areas have been accommodations and food services, transportation and warehousing, and health care. The highest industrial location quotients are found in agriculture/forestry/fishing/hunting (about 4.3), manufacturing (about 1.75), health care and utilities (both about 1.5).

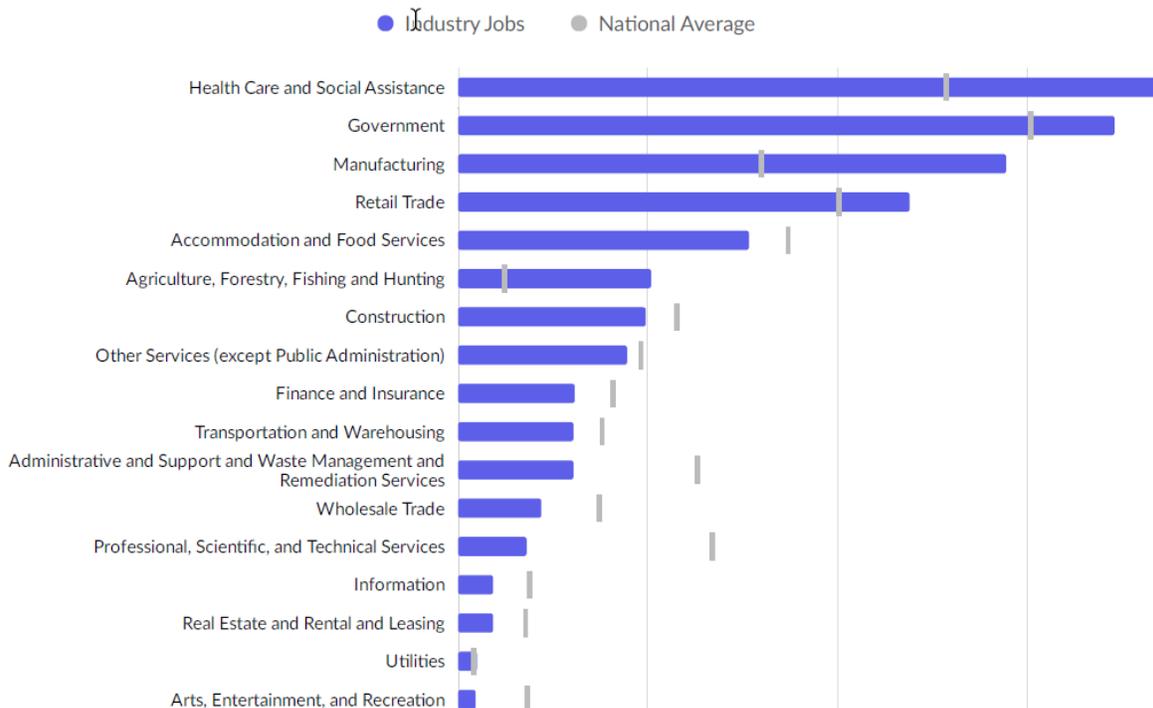
Manufacturing turns out the most gross regional product by far in the area, reaching about \$450,000,000 annually. Health care stands at about \$300,000,000. Government, manufacturing and retail trade all posted fewer jobs in 2019 than 2014, while health care added jobs. Well over half the region’s businesses are small businesses with fewer than 20 employees. (See Appendix 2 for additional economic overview information on the region.)

Review of existing industry

The Greater Poplar Bluff five-county region is something of an anomaly in that manufacturing is its third-largest employer group, after health care and government. Poplar Bluff is, in fact, a center for manufacturing, in an era when many manufacturing jobs have been offshored. The region is also heavily agricultural, with significant presence in both the farming and timber industries.

Industry Characteristics

Largest Industries



Existing industry in the Poplar Bluff area has three significant clusters: woodworking, metal fabrication, and food processing. The largest single manufacturing employer is WW Wood Products, a manufacturer of cabinets, at about 1,500 employees. Other major employers are Gates, Briggs and Stratton, and Mid-Continent Steel and Wire, all in the 400-600 range. (See Appendix 2)

Besides WW Wood Products, there are a significant number of logging, sawmill, millwork, pallet, and wood treatment facilities. Woodworking has both the largest number of employers and the most employees of any industry cluster although, with the exception of WW Wood Products, all of the entities have less than 50 employees.

Food processing falls more into the outlying counties of the region, led by the Tyson Foods chicken processing plant in Dexter, Mo. Today's Foods in Piedmont and Nestle Purina in Bloomfield are also major employers in the industry. A number of smaller manufacturers handle specialty foods, specialty meat processing, seasonings, condiments and snacks. The region is a major producer of commodity row crops, fruit and vegetables, and cattle.

Metal fabrication is led by Mid-Continent Steel and Wire, the largest metal fabrication employer. A number of other metalworking industries range from those in support of the wood products industry to equipment, engines and auto parts to sheet metal fabrication. There are also a significant number of small machine shops.

A review of industry purchases shows a marked lack of local purchases of warehousing and storage. Other categories in which more than \$10 million annually is spent outside the region are computer system design and internet publishing, broadcasting and web hosting. More than \$9 million is spent annually outside the region on data processing, and more than \$6 million annually on custom computer programming. Two other industrial categories in which more than \$5 million annually is spent out of region are plastics material and resin manufacturing, and motor vehicle electrical and electronic manufacturing.

NAICS	Purchases from	In-region Purchases	Imported Purchases
541512	Computer Systems Design Services	\$281,667	\$10,992,264
493110	General Warehousing and Storage	\$881,355	\$10,851,520
519130	Internet Publishing and Broadcasting and Web Search Portals	\$5,570	\$10,259,383
531390	Other Activities Related to Real Estate	\$2,408,531	\$9,211,281
518210	Data Processing, Hosting, and Related Services	\$189,335	\$9,167,125
541611	Administrative Management and General Management Consulting Services	\$645,875	\$9,127,116
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$0	\$7,486,958
541511	Custom Computer Programming Services	\$11,406	\$6,339,812
336320	Motor Vehicle Electrical and Electronic Equipment Manufacturing	\$0	\$5,879,583
325211	Plastics Material and Resin Manufacturing	\$0	\$5,620,839
531312	Nonresidential Property Managers	\$85,731	\$5,517,177
333618	Other Engine Equipment Manufacturing	\$3,509,222	\$4,726,682
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$306,072	\$4,664,738
423830	Industrial Machinery and Equipment Merchant Wholesalers	\$364,486	\$4,424,035
326199	All Other Plastics Product Manufacturing	\$660,046	\$4,160,809
238210	Electrical Contractors and Other Wiring Installation Contractors	\$1,053,443	\$4,027,590
336390	Other Motor Vehicle Parts Manufacturing	\$0	\$3,561,807
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	\$152,436	\$3,422,301
541714	Research and Development in Biotechnology (except Nanobiotechnology)	\$0	\$3,310,507
331511	Iron Foundries	\$103,681	\$3,291,879
325199	All Other Basic Organic Chemical Manufacturing	\$0	\$3,192,275

111000	Crop Production	\$3,239,684	\$3,160,650
323111	Commercial Printing (except Screen and Books)	\$59,791	\$2,909,634
332710	Machine Shops	\$69,428	\$2,745,300
423690	Other Electronic Parts and Equipment Merchant Wholesalers	\$77,257	\$2,534,522
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	\$124,879	\$2,443,853
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$0	\$2,413,273

(See Appendix 3, Industry purchases)

Review of infrastructure

Poplar Bluff is located at the intersection of U.S. Highway 67 and U.S. Highway 60, connecting it with St. Louis, Little Rock, AR, and Interstates 55, 57 and 44. Highway 67 has been designated by Congress as “Future Interstate 57,” which will extend that interstate from its western terminus outside Sikeston, Mo., to a junction with Interstates 40 and 30 in Little Rock. The city is served by Union Pacific Railroad. Nearest commercial air service is in St. Louis and in Memphis, TN.

Utilities are provided by the City of Poplar Bluff (electricity and water); Aspire provides natural gas; and internet services are provided by NewWave, the City of Poplar Bluff, and AT&T internet. Top internet speed available is 1,000 Mbps, and average speed to all subscribers is 46.18 Mbps. Data caps are in place for most providers.

Review of existing workforce

Forestry, logging, wood products manufacturing

Occupational Classification	Number of workers
Foresters	15
Forest and Conservation Technicians	48
Tree Trimmers and Pruners	38
Forest and Conservation Workers	10
Fallers	11
Logging Equipment Operators	67
Carpenters	320
Cabinetmakers and bench carpenters	214
Furniture Finishers	27
Sawing Machine Setters, Operators, and Tenders, Wood	138
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	108
Woodworkers, All Other	13
Logging	12
Sawmills and planing mills	51
Millwork	11
Wood pallet manufacturing	51
Total Forestry, logging and wood products manufacturing	1,133

It should be noted that EMSI numbers in this category may be incomplete. An EMSI listing of companies in the four-county region does NOT include WW Wood Products, the largest single regional employer in the field. If those employees are NOT captured in the SOC occupational code listing, which I would expect to be the case if the company is not listed, then the total number of workers in the field should be increased to about 2,600. (See appendix 4, occupation table.)

Food production and processing

Occupational classification	Number of workers
Farmers and ranchers	1028
Farmworkers and laborers	676
Food service managers	46
Food prep and service managers	251
Fast food cooks	112
Institutional cooks	297
Restaurant cooks	360
Food prep workers	102
Combined food prep and serving workers	1,161
Bakers	25
Meat, Poultry and Fish Cutters and Trimmers	323
Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders	25
Food Batchmakers	94
Food Cooking Machine Operators and Tenders	45
Food Processing Workers, All Other	38
TOTAL FOOD PRODUCTION AND PROCESSING WORKERS	4,235

Restaurant and other food service workers are included in this category because these are workers with the same basic skill sets as those required in food processing. Should, for example, another poultry processing plant be recruited, food service workers are a good source of potential workforce for that plant. (See Appendix 4, occupation table)

Metal fabrication and manufacturing

Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	99
Industrial Engineering Technician	47
Mechanical Engineering Technicians	11
Sheet Metal Workers	19
Maintenance Workers, Machinery	24
Maintenance and Repair Workers, General	390
Installation, Maintenance, and Repair Workers, All Other	295
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	80
Engine and Other Machine Assemblers	81
Assemblers and Fabricators, All Other, Including Team Assemblers	360
Structural Metal Fabricators and Fitters	16
Forging Machine Setters, Operators, and Tenders, Metal and Plastic	21

Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	99
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	34
Machinists	98
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	184
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	95
Tool and Die Makers	28
Welders, Cutters, Solderers, and Brazers	151
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	13
Tool Grinders, Filers, and Sharpeners	50
Metal Workers and Plastic Workers, All Other	50
TOTAL	1,938

Metalworking jobs are broadly spread across a number of skill sets. In addition, there are other production jobs whose skill sets may translate into metalworking and metal fabrication.

(See appendix 4, occupation table.)

Target industry recommendations

Target industry recommendations are based on a number of factors, including the existence of workers with needed skill sets, business purchases, infrastructure, and industry clusters. They also reflect the upward or downward trend in employment in specific industries, and the migration of industries from higher-price areas of the country to locations with a lower cost of doing business. Finally, the availability of raw materials is taken into consideration.

Based on all these factors, the target industries recommended for the Poplar Bluff region are:

1. Forest products. Butler County is the southeasternmost Missouri county counted as a portion of the Eastern Ozark Foothills, the most heavily forested area in the state. Existing transportation networks mean timber logged to the north and west of Poplar Bluff can easily be brought into the area for milling, finishing and for the more advanced areas of wood products manufacturing, including furniture, cabinets and other millwork. One of the region's largest employers, WW Wood Products, specifically expressed the wish for a plywood production facility in proximity to its plant. Additionally, there are a sufficient number of loggers and sawmills in the region to support a more robust local wood products industry. As the majority of the wood produced in the Ozark Highlands is oak, the potential for wooden, turned and finished furniture, perhaps produced in small shops for a high-end niche, specialty market, should not be ignored.

2. Information Technology. Three of the top 10 products purchased outside the region by local businesses and industries, about \$26 million annually, fall into this category. They include \$10 million in internet publishing and broadcasting and web portals; \$9 million in data processing, hosting and related services; and \$6 million in custom computer programming. These, also, will likely be small job-number companies, but that is balanced by salaries that are much higher than the regional average. A barrier to this kind of industry may be the slow average speed of local broadband networks and the existence of data caps. A major advantage is these kinds of businesses can locate in renovated buildings in the historic downtown area, contributing to the revitalization of downtown.

3. Transportation, logistics and warehousing. With its four-lane connection to Interstate 55 and its location at the junction of U.S. Highways 60 and 67, Poplar Bluff is well-placed to be a jumping-off spot for distribution to the entire south central region of Missouri. There is a dearth of general warehousing and storage availability in the region, evidenced by the fact local business and industry spends almost \$11

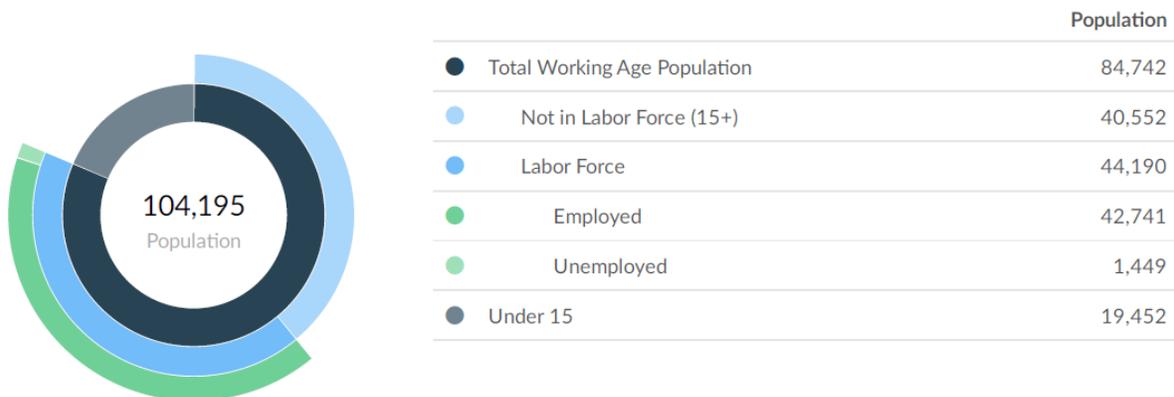
million annually outside the region for warehousing and storage. Both Union Pacific and U.S. Highway 60 serve the port of Southeast Missouri, providing connectivity via the Mississippi River for commodities and other bulk shipping. There is a market for bulk warehousing space in the region.

4. Food processing. Southeast Missouri and Northeast Arkansas are expected to be the newest growth area for poultry growing and processing in the central portion of the country following build-out of the industry in north central and northwestern Arkansas. There is already a Tyson presence in the region, and the location of PECO Foods just south of the state line in Pocahontas, AR, represents what may become a wave of plant and growing locations in the region. Other food processing opportunities are present in the major agricultural commodity production in the eastern and southern portion of the region, where soybeans, corn and wheat are produced in abundance. Potential targets for industry related to commodity production are soybean processing and grain milling and baking. Pet food production would be a natural target as well. Thought should also be given to the larger-scale farming of fruits and vegetables for canning or for distribution fresh, particularly with a eye to niche market, upscale, and organic farming to serve the St. Louis—Little Rock—Memphis markets. There may also be a potential for aquaculture projects along the Black River to the east and south of Poplar Bluff as more and more food production is onshored and less food is imported.

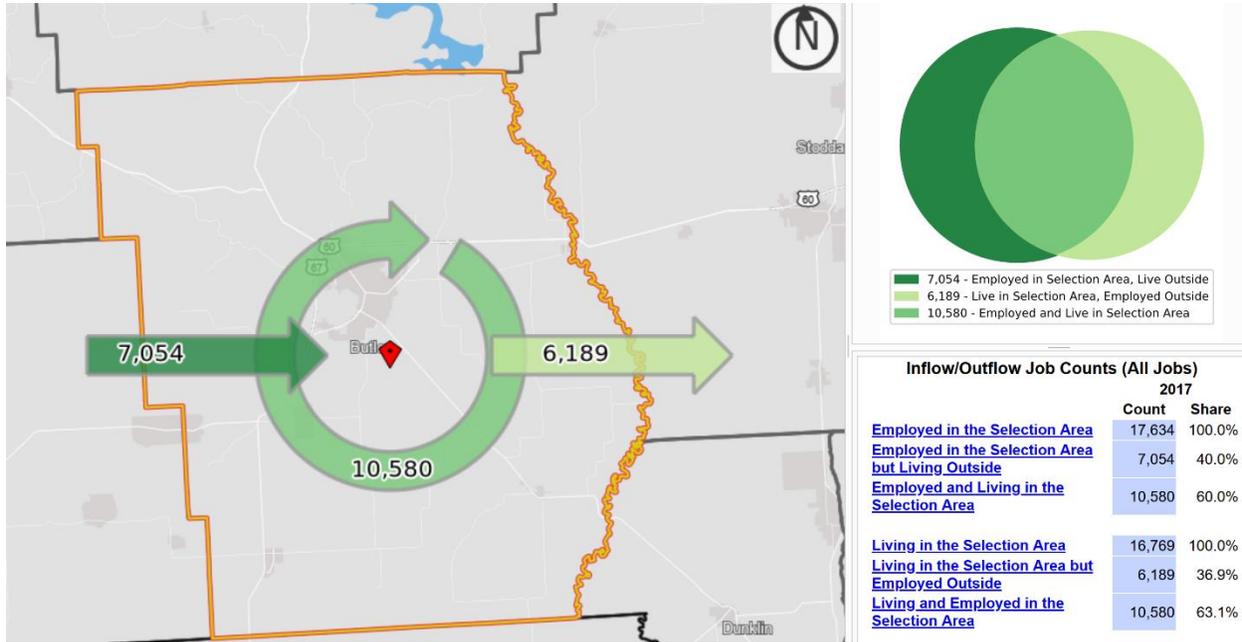
5. Metalworking and metal fabricating manufacturing. This is the largest single manufacturing cluster in the Poplar Bluff region. There is a significant cluster of businesses involved in metal products manufacturing, ranging from small makers of knives and saw blades to major manufacturers of steel nails and wire. There is also a good cohort of skilled workers in metal working, welding, and machining. A ready and convenient source of steel is located less than 90 miles away at Nucor in Armorel, Arkansas. Given the ready availability of coil steel, manufacture of metal buildings might be a productive area. Rail and highway network give good access to raw material and good potential for shipping finished products.

Review of regional labor force

The population of the five-county region that makes up Poplar Bluff’s primary laborshed was 104,925 in 2019, and is projected to fall by 1,197, to 102,998 by 2024. The working age population in 2019 was 84,742, of whom 44,190 are in the labor force. The population under the age of 15 is 19,452, while the population between the ages of 50 and 55 is 21,449, indicating a workforce that is aging only slightly. Population trends indicate the number of residents will continue a slow decline in the next five years, while the number of jobs is projected to increase by about the same rate, indicating that employers may continue to have trouble filling positions. However, the rate of participation in the labor force increased by two percentage points in late 2019. That corresponds with a slight uptick in the unemployment rate in late 2019.



Poplar Bluff is the employment center of the region and has a sizeable in-commute from the remaining four counties. In 2019, there were 17,984 jobs in the 63901 zip code, but only 12,985 workers reside there. The only other significant employment center in the region is Dexter, in Stoddard County, with 6,944 jobs.



A look at the existing labor force in the Poplar Bluff region reveals a total of 40,371 jobs, a decrease of 1,435 jobs. The top 25 job classifications in terms of numbers are heavily weighted toward health care.

SOC	Description	2014 Jobs	2019 Jobs	2019 Location Quotient	Avg. Hourly Earnings
		41,806	40,371		\$18.25
39-9021	Personal Care Aides	1,656	2,050	3.32	\$10.95
41-2011	Cashiers	1,315	1,285	1.45	\$10.11
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	1,084	1,161	1.26	\$9.53
Nov-13	Farmers, Ranchers, and Other Agricultural Managers	1,274	1,028	8	\$26.99
41-2031	Retail Salespersons	1,103	980	0.88	\$13.02
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	989	940	1.48	\$14.86
29-1141	Registered Nurses	818	831	1.12	\$27.61
53-3032	Heavy and Tractor-Trailer Truck Drivers	730	738	1.42	\$22.15
43-9061	Office Clerks, General	636	621	0.74	\$13.03

31-1014	Nursing Assistants	610	602	1.62	\$12.20
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	726	562	0.88	\$12.14
43-5081	Stock Clerks and Order Fillers	514	517	1.02	\$11.34
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	514	483	0.65	\$13.93
25-2021	Elementary School Teachers, Except Special Education	504	472	1.35	\$20.90
11-1021	General and Operations Managers	460	457	0.77	\$37.69
47-2061	Construction Laborers	429	444	1.21	\$17.26
37-2012	Maids and Housekeeping Cleaners	476	439	1.2	\$10.29
35-3031	Waiters and Waitresses	399	408	0.64	\$9.98
41-1011	First-Line Supervisors of Retail Sales Workers	451	403	1.17	\$19.70
25-2031	Secondary School Teachers, Except Special and Career/Technical Education	395	392	1.52	\$21.21
49-9071	Maintenance and Repair Workers, General	385	390	1.01	\$17.36
31-1011	Home Health Aides	543	385	1.86	\$12.32
29-2061	Licensed Practical and Licensed Vocational Nurses	375	366	2.02	\$18.23

Similarly, the top 25 classifications in NAICS codes in regional employers also reflect a concentration in health care.

NAICS	Description	2010 Jobs	2010 Location Quotient	2010 Payrolled Business Locations	Avg. Earnings Per Job
		42,495		3,604	\$41,731
903611	Elementary and Secondary Schools (Local Government)	2,811	1.32	44	\$49,547
903999	Local Government, Excluding Education and Hospitals	1,719	1.05	122	\$43,052
814110	Private Households	1,646	4.77	1,033	\$11,742
111000	Crop Production	1,594	6.73	109	\$51,772
333618	Other Engine Equipment Manufacturing	1,579	134.32	1	\$47,147
722513	Limited-Service Restaurants	1,179	1.16	55	\$15,733
623110	Nursing Care Facilities (Skilled Nursing Facilities)	1,128	2.31	22	\$26,716

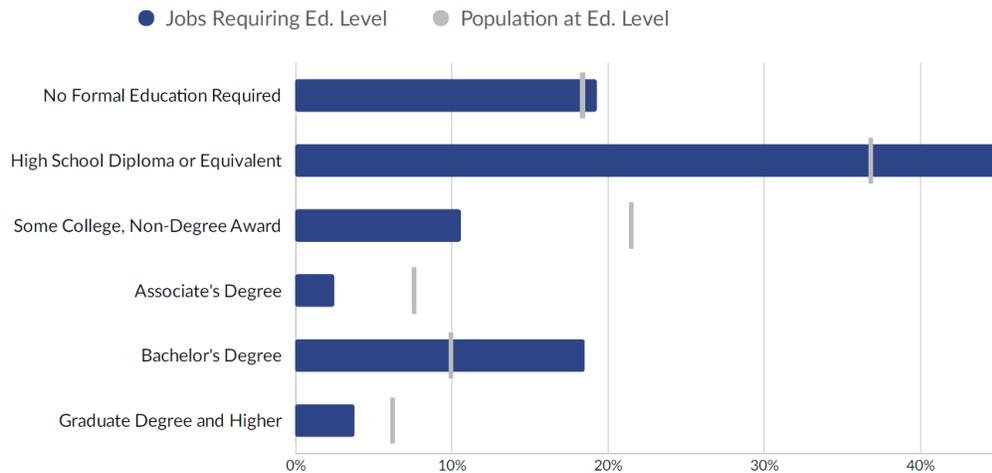
90299	State Government, Excluding Education and Hospitals	1,019	1.46	53	\$54,639
62211	General Medical and Surgical Hospitals	988	0.78	6	\$56,687
62412	Services for the Elderly and Persons with Disabilities	956	4.32	18	\$19,617
31161	Poultry Processing	949	14.36	1	\$46,732
90119	Federal Government, Civilian, Excluding Postal Service	949	1.35	35	\$96,799
72251	Full-Service Restaurants	911	0.69	60	\$17,764
44511	Supermarkets and Other Grocery (except Convenience) Stores	714	1.03	25	\$20,868
62161	Home Health Care Services	705	2.07	12	\$30,305
33639	Other Motor Vehicle Parts Manufacturing	688	20.31	1	\$66,485
45231	Warehouse Clubs and Supercenters	672	1.84	2	\$35,238
33711	Wood Kitchen Cabinet and Countertop Manufacturing	662	20.02	9	\$61,376
44711	Gasoline Stations with Convenience Stores	660	3.08	75	\$20,118
62111	Offices of Physicians (except Mental Health Specialists)	648	0.95	65	\$63,492
56132	Temporary Help Services	598	0.97	4	\$15,888
52211	Commercial Banking	522	1.36	49	\$57,075
81311	Religious Organizations	486	0.98	1	\$17,112
48412	General Freight Trucking, Long-Distance, Truckload	477	2.87	32	\$59,923
44111	New Car Dealers	423	1.60	13	\$52,478

It should be noted that the NAICS numbers are from the 2010 census, and thus the engine manufacturing numbers reflect Briggs and Stratton prior to downsizing. SOC numbers are from 2019.

EMSI modeling of workforce and job profiles

An EMSI profile of the existing employers in the region and the workforce education level shows some significant underemployment of workers with some college, an associate degree or a graduate degree, while there is a shortage of workers with bachelors' degrees. Unique job postings tracked shows the greatest number of openings in healthcare practitioners and technical personnel, transportation and material moving, and sales and related occupations.

Underemployment



EMSI data on workforce commuting shows 10,580 workers both live in and are employed in Butler County, while 7,054 live outside the county and commute in. Outcommute from the county for workers living there is 6,189. About 60 percent of those commute 45 minutes or less, indicating the majority of them commute elsewhere in the laborshed.

Further data on the workforce was drawn from employers, both in interviews with 10 industrial employers with workforces ranging from 70 to 1,400 in size, and from an online survey sent to all Chamber of Commerce members and thus reflecting a broader range of types of employers.

General employer survey

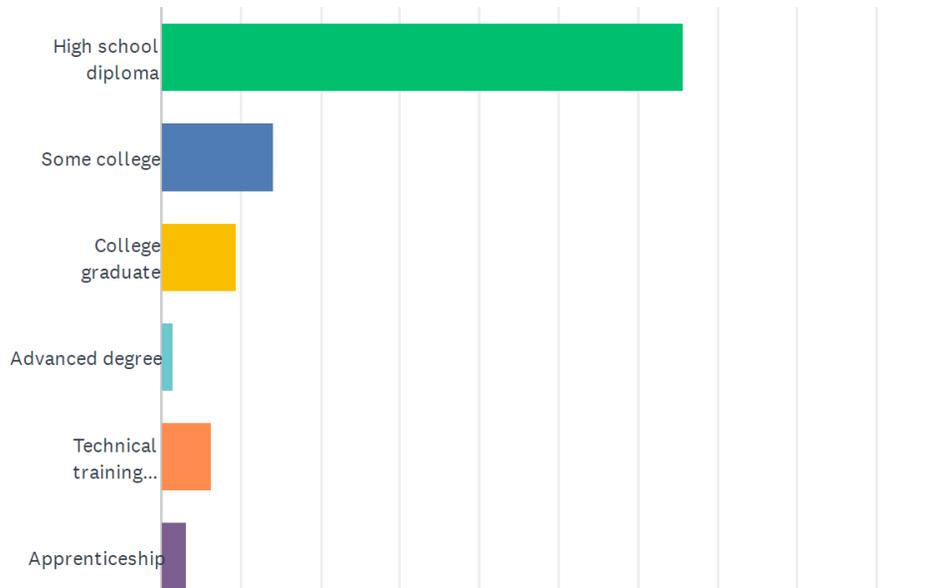
A 10-question, web-based employer survey was sent to all members of the Poplar Bluff Chamber of Commerce. A total of 70 employers responded to the survey, with the most respondents in the Under-10 (25) and 10-50 (28) employee category. Five employers of 50-100, seven employers of 100-250, and five employers of more than 250 people responded.

These employers reported an average turnover rate of 20 percent, but only six percent showed an average employee tenure of less than a year. The most common employee turnover average was from 1-5 years (40 percent of respondents). A full 50 percent of respondents reported average employee tenure of from 5-10 or 10-20 years.

A majority of respondents said they required a high school diploma as a prerequisite for hiring. Fewer than 10 percent required a bachelor's degree. Starting salaries listed by respondents ranged from minimum wage to \$45,000 per year. Asked to rate the difficulty of finding suitable employees for their starting salary, on a scale of 1 to 100, with 1 being easiest and 100 being most difficult, the average response was 57. Ten respondents ranked the difficulty as 90 or higher, while 15 ranked it between 1 and 10. Ninety-five percent of respondents said they provided post-hire training to employees, and of those, 75 percent said the training was on-the-job while 18 percent said they offered off-site training, but most said they used a combination of several methods, including on-line instruction.

What skill/education level do you require from starting employees?

Answered: 64 Skipped: 6



A majority of employers offered benefits including vacation, health insurance and a retirement or pension plan, while almost a third offered tuition reimbursement to employees who took college classes.

Industrial employer interviews

A total of 10 employers were interviewed individually. Information collected must be considered anecdotal, as interviews were specific to most industries' specific characteristics. Information gathered from the interviews is released only anecdotally and in aggregate. Some general observations are:

- A significant percentage of employers said they did not require a high school diploma or GED if a prospective employer had experience in an industrial setting.
- All employers said they experienced a major turnover problem in the first six months of employment, but had little problem retaining employees who had more than a year of tenure.
- Average pay reported for skilled workers was \$17 per hour.
- Average pay for unskilled labor was \$12 per hour.
- Four employers reported using apprenticeship programs.
- Two employers reported they will reimburse tuition for college classes.
- Seven employers said they promoted from within their ranks whenever possible.
- Most employers said they would hire convicted felons, as long as the felonies did not involve violence.

A significant number of employers said they have difficulty in finding prospective employees coming into the workforce from high school or college who have any understanding of the industrial environment, but few said they had any kind of close working relationship with the school systems or with the community college/technical training system. Employers also expressed varying degrees of dissatisfaction in young workers' work ethic. Attendance and tardiness were listed as major concerns, while other soft-skill issues cited by one or more employers included appropriate dress, quality of workmanship, and attitude toward other employees and supervisory personnel. Employers also noted they had some concerns with their ability to replace skilled workers as they retired.

Education and training pipeline

Two educational institutions in Poplar Bluff provide local training beyond high school for workforce skills aimed toward the technical area. The closest four-year colleges offering bachelors' and advanced degrees are Williams Baptist College in Walnut Ridge, Ark.; Southeast Missouri State University in Cape Girardeau; Arkansas State University in Jonesboro and Missouri State University in Springfield, with a branch at West Plains. There are 258 other two- and four- year colleges and technical training schools within a 150 mile radius of Poplar Bluff, and the total program completions at those schools in 2019 was 97,293. The top 10 programs completed were liberal arts and sciences, business administration, registered nurse, general studies, general business and commerce, licensed practical nurse, general welding technology and psychology.

Interviews with both industrial employers and with leadership at Three Rivers Community College and the Poplar Bluff Technical Career Center indicate there is only minimal communication between training entities and employers regarding availability, skill sets and training levels for potential employees.

The top degree and certification programs at institutions within 150 miles of Poplar Bluff are:

CIP Code	Description	Institutional Completions > All Program Types > 2017 Completions	Institutional Completions > All Program Types > 2018 Completions
		97,721	97,293
24.0101	Liberal Arts and Sciences/Liberal Studies	7,085	7,144
52.0201	Business Administration and Management, General	5,709	4,891
51.3801	Registered Nursing/Registered Nurse	4,720	4,802
24.0102	General Studies	2,385	2,714
52.0101	Business/Commerce, General	2,064	2,054
51.3901	Licensed Practical/Vocational Nurse Training	1,682	1,859
48.0508	Welding Technology/Welder	1,484	1,638
42.0101	Psychology, General	1,594	1,479
26.0101	Biology/Biological Sciences, General	1,474	1,466
51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide	1,526	1,445
52.0301	Accounting	1,355	1,398
44.0701	Social Work	1,257	1,376
51.0801	Medical/Clinical Assistant	1,067	1,059
12.0401	Cosmetology/Cosmetologist, General	1,134	1,014
13.0408	Elementary and Middle School Administration/Principalship	824	1,006
52.0801	Finance, General	759	909
47.0604	Automobile/Automotive Mechanics Technology/Technician	669	900
31.0505	Kinesiology and Exercise Science	863	887
30.0101	Biological and Physical Sciences	967	814
14.1901	Mechanical Engineering	740	805
51.3805	Family Practice Nurse/Nursing	866	775
43.0104	Criminal Justice/Safety Studies	751	767
52.1401	Marketing/Marketing Management, General	703	730
11.0701	Computer Science	714	720
51.0904	Emergency Medical Technology/Technician (EMT Paramedic)	713	704

13.1202	Elementary Education and Teaching	748	688
30.9999	Multi-/Interdisciplinary Studies, Other	793	677
11.0101	Computer and Information Sciences, General	664	670

(See Appendix 5, Educational completions table.)

Industrial strategy recommendations

Poplar Bluff is in the somewhat enviable position of having a diverse economy with a strong manufacturing sector, as well as a workforce which, while aging, is not aging as rapidly as in many other exurban areas in the nation. In most of the industrial sector, there is a sufficient number of people with the requisite educational level to fill available positions. While there is a shortage of baccalaureate degreed workers, there are sufficient four-year colleges and universities within a 100 to 150 mile radius to fill the need, provided the quality of life in the Poplar Bluff region is sufficient to attract them.

The significant weakness of Poplar Bluff in industrial recruitment is the shortage of product. There is a decided lack of greenfield sites and available buildings to lure industry to the region. Otherwise, the industrial infrastructure is sufficient for most mid-sized and smaller industry.

Recommendations fall into three categories: Product improvement, labor pool/pipeline improvement, and recruitment/growth strategy.

Product Improvement:

1. The single biggest need is for the acquisition of more land for industrial development. Efforts should be made to secure land near the existing industrial park, or elsewhere along the U.S. 67 and U.S. 60 corridors, to provide for an expansion of the present industrial park or creation of a new one. The region should develop at least one certified site to be listed on the Missouri Partnership website. If financially feasible, a spec building should be constructed, in the form of a shell with no floor, and in the alternative, a virtual spec building should be created with information on cost to construct and, if possible, pre-permitted.
2. A complete assessment should be made of broadband availability and the potential for expanding it to accommodate industry, particularly in the information services category. At present, federal funding is available for expansion of broadband services, and a determination should be made as to whether an expansion in broadband capability is necessary and financially feasible.
3. A projection should be completed regarding the cost of creating a waste pre-treatment facility capable of pre-treating wastewater from food processing industries to a level where it can be accepted by the city's sewer system or discharged into the Black River. If a site can be located that is suitable for a large-scale food-processing operation, necessary preliminary permitting, engineering and cost estimates should be done involving drawing water from the river for process use, wastewater treatment, and discharge back into the river.

Labor pool/pipeline improvement

1. A closer relationship should be developed between local industries and the two local institutions which provide technical and career training. There should be a clear understanding by the institutions of what the demand will be in different areas and skill sets, and an understanding on the part of employers that they will give preference to graduates from those programs.
2. The Chamber should establish a relationship with four-year colleges and universities within a 150-mile radius which will enable it to keep apprised of how many upcoming graduates are expected in primary

fields related to its target industries and existing industry base, including health care, engineering and forestry. This will enable the Chamber to respond rapidly when a prospect or an existing industry expresses a need for personnel at the baccalaureate level.

3. The potential for establishing and expanding internship programs, both with the local technical training institutions and with regional colleges and universities, should be explored.

Recruitment/growth strategy

1. Identify existing manufacturers' needs for product or raw material they are currently having to source out of the region and particularly, outside the country. When those needs are collated, identify several specific industrial categories for potential recruitment, and research what companies within those clusters may be in growth or relocation mode, and contact them.

2. Once a site or sites is acquired and a site is certified, contract with a lead identification firm to prospect for leads and set meetings with companies which are planning expansion or relocation projects, focusing on one target area at a time. Concurrently, make site consultant visits to centers like Chicago, Dallas and Atlanta, to introduce the new site.

3. Investigate potential prospecting trips in conjunction with the Missouri Partnership.

4. As reshoring becomes increasingly a priority, focus on food processing as a major opportunity.

5. Focus on the potential for becoming a logistics center for the region. Investigate the market for a transload facility where goods may be unloaded from rail, warehoused, and then trucked to destinations. If possible, build speculative warehouse space near rail and the 60-67 junction.

6. Investigate the potential for creating a revolving loan fund to assist start-up entrepreneurs in manufacturing businesses.

This report has been prepared by Future Focus Development Solutions, an independent economic and community development consulting firm, and is based on EMSI, ESRI, Bureau of Labor Statistics and U.S. Census Bureau information compiled by the Trent Lott National Center at the University of Southern Mississippi.

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