

Dynamic change in San Joaquin County's Goods Movement System

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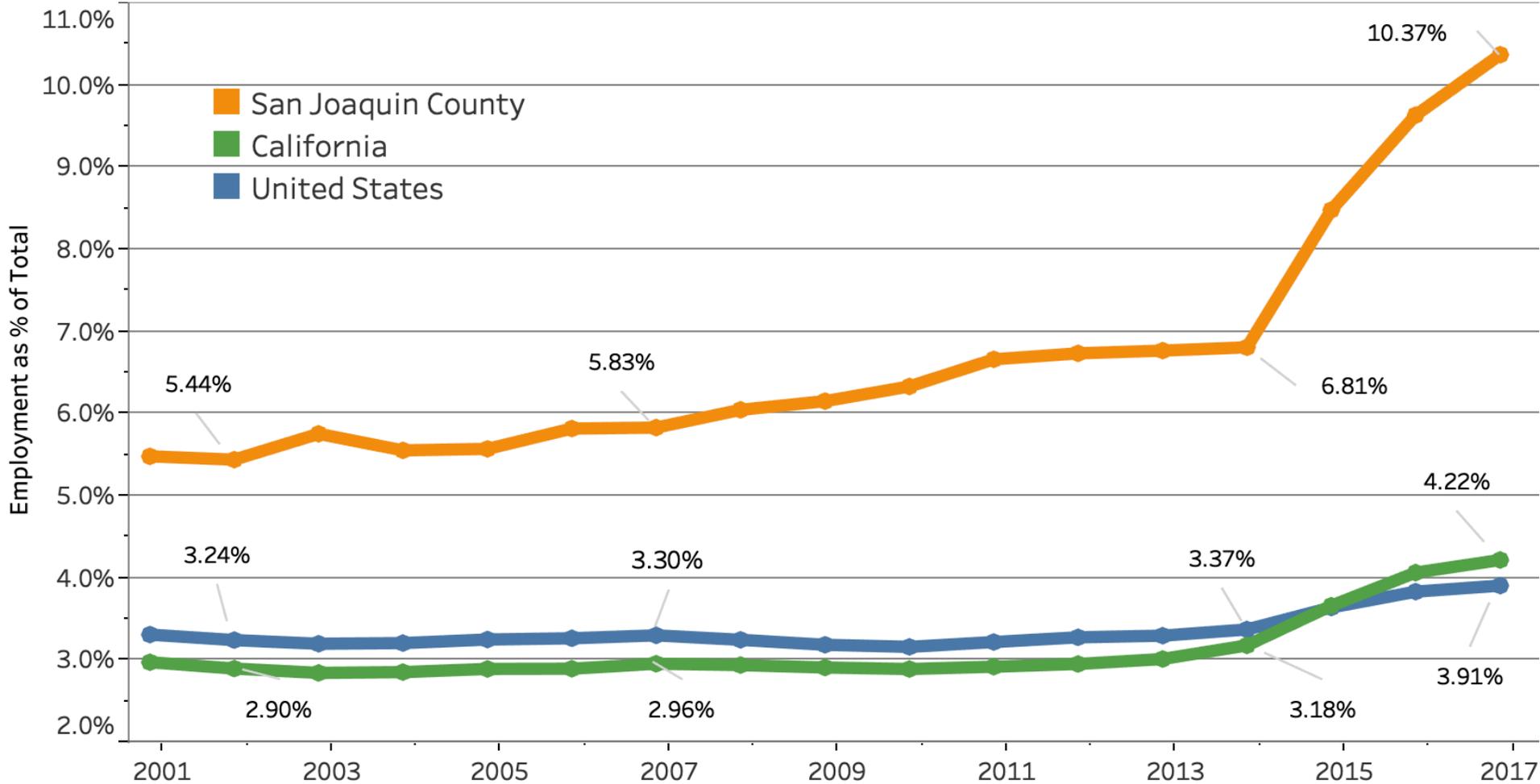
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Overview



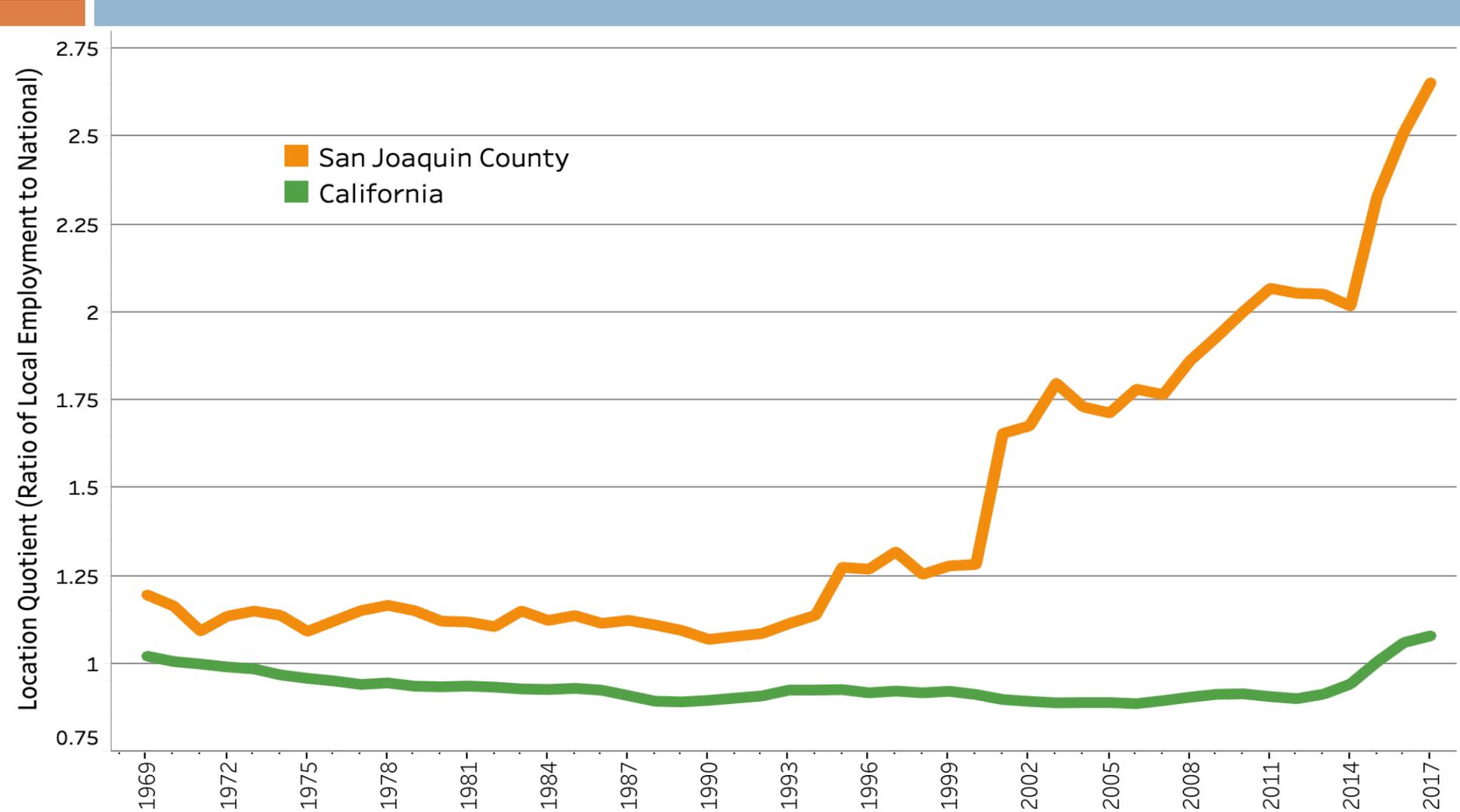
- Competitiveness of the Goods Movement System
- Dynamics of the Goods Movement System
- Policy Opportunities and Challenges

Transportation & Warehousing Sector Employment Shares



Source: Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by Industry (CAEMP25) database

Transportation & Warehousing Location Quotient (U.S.)



Source: Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by Industry (CAEMP25) database

Top-10 Transportation & Warehousing MSAs in the U.S. by share of employment

Metropolitan Statistical Area	Employment	T&W as % of Total
Laredo, TX	20,271	14.3%
Stockton-Lodi, CA	34,202	10.4%
Memphis, TN-MS-AR	79,977	9.4%
Houma-Thibodaux, PA	10,249	9.0%
Chambersburg-Waynesboro, PA	6,733	8.4%
Harrisburg-Carlisle, PA	32,235	7.7%
Riverside-San Bernardino-Ontario, CA	155,837	7.6%
Joplin, MO	7,693	7.5%
Scranton--Wilkes-Barre—Hazleton, PA	23,722	7.3%
Reno, NV	21,309	7.0%

Source: Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by Industry (CAEMP25) database

Top-10 Transportation & Warehousing MSAs in the U.S. by new jobs per person employed

Metropolitan Statistical Area	Job Postings	Postings per 10,000 people employed
Monroe, MI	1,354	319
Toledo, OH	6,877	247
Fort Wayne, IN	4,581	243
Laredo, TX	2,037	240
Memphis, TN-MS-AR	13,140	232
Greeley, CO	2,335	225
<i>Stockton-Lodi, CA</i>	<i>4,451</i>	<i>212</i>
Cedar Rapids, IA	3,054	205
Davenport-Moline-Rock Island, IA-IL	3,707	191
Greensboro-High Point, NC	6,110	185

Source: Labor Insight Jobs (Burning Glass Technologies)

Transportation & Warehousing employment in NCMR, California & U.S.

Area		2013	2017	% Change 2013-2017
Northern California Megaregion	<i>Stockton-Lodi MSA</i>	<i>6.8%</i>	<i>10.4%</i>	<i>53.2%</i>
	Merced MSA	4.2%	5.0%	19.0%
	Modesto MSA	4.5%	4.8%	8.8%
	Vallejo-Fairfield MSA	2.7%	4.1%	51.1%
	Sacramento--Roseville--Arden-Arcade MSA	2.8%	3.7%	29.3%
	Napa MSA	2.1%	2.8%	29.4%
	San Jose-Sunnyvale-Santa Clara MSA	1.6%	2.4%	53.0%
	Salinas MSA	2.0%	2.3%	14.1%
	Santa Rosa MSA	1.9%	2.1%	13.0%
	San Francisco-Oakland-Hayward MSA	3.1%	N/A	N/A
	Santa Cruz-Watsonville MSA	N/A	N/A	N/A
California	3.0%	4.2%	40.0%	
United States	3.3%	3.9%	18.5%	

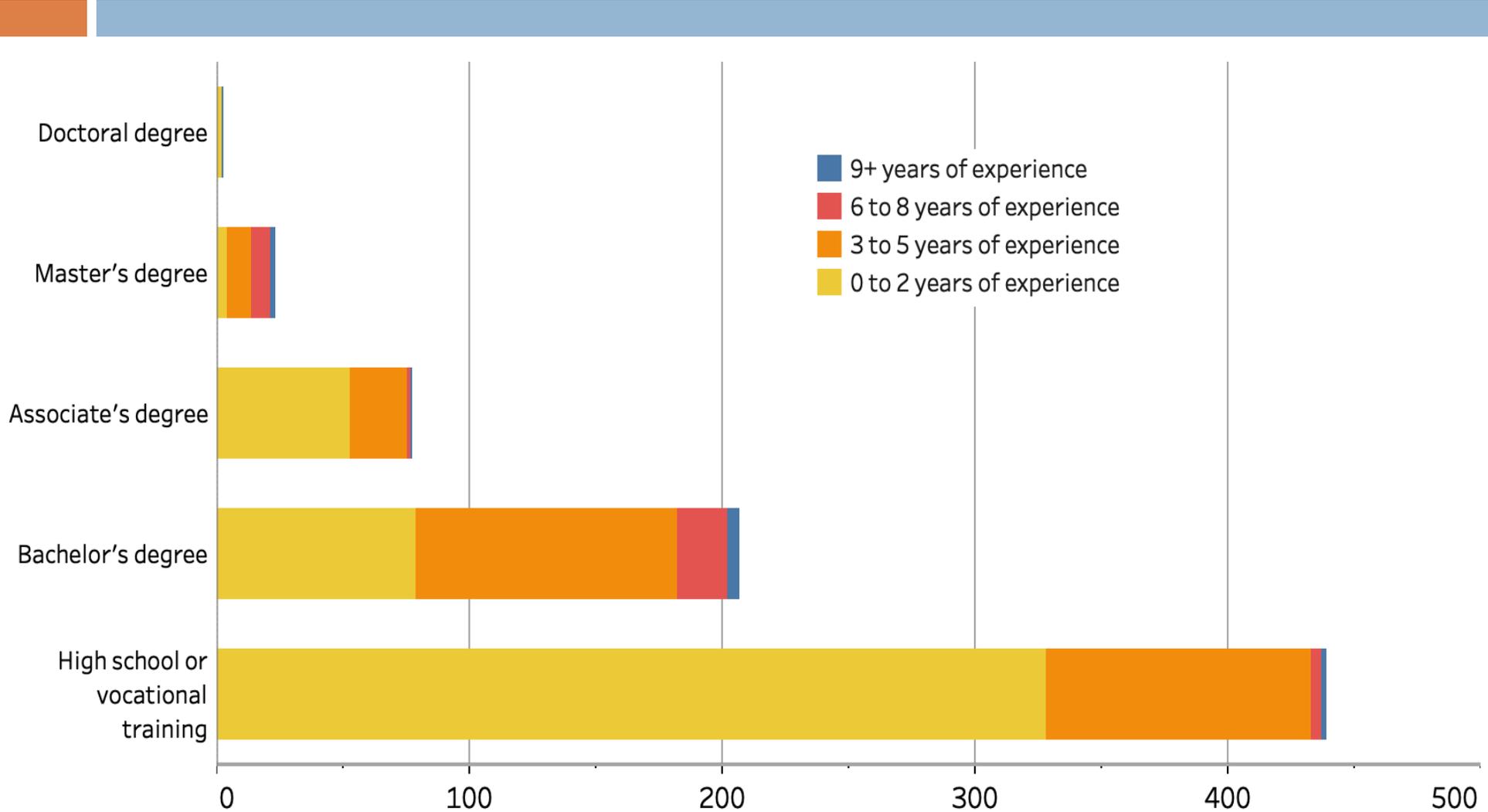
Source: Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by Industry (CAEMP25) database

Ratio of Retail to Transportation & Warehousing Employment

Area	2008 Ratio	2013 Ratio	2018 Ratio
Laredo, TX	1.02	0.93	0.77
Memphis, TN-MS-AR	1.08	0.99	0.96
Stockton-Lodi, CA	1.79	1.52	0.93
California	3.21	3.15	2.63
United States	3.35	3.28	3.01

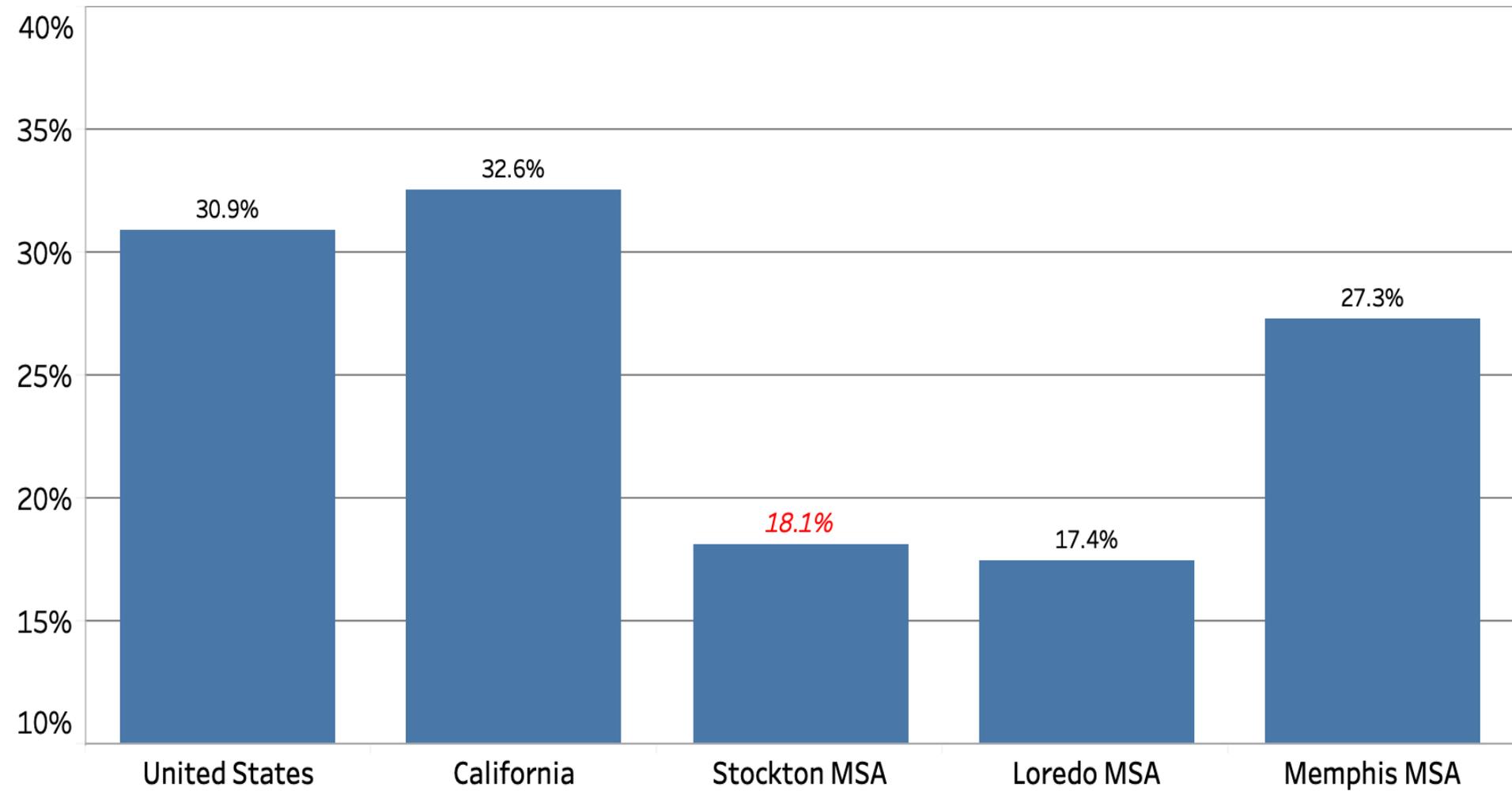
Source: Bureau of Labor Statistics, Current Employment Statistics database

Experience & Education in County Transportation & Warehousing Jobs



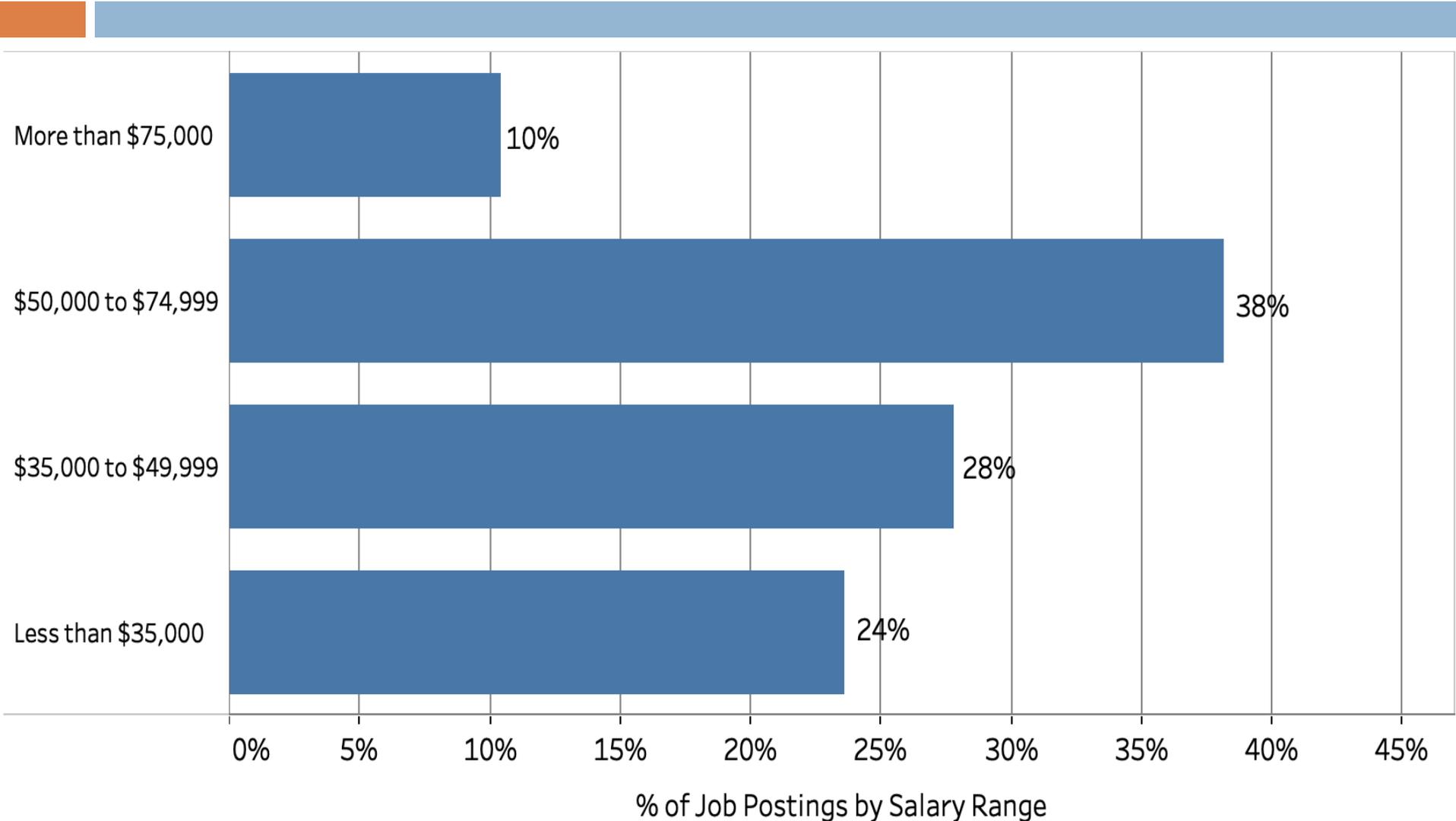
Source: Labor Insight Jobs (Burning Glass Technologies)

Population 25 & Over with a Bachelor's Degree or Higher



Source: Census Bureau, American Community Survey, 2017 5-Year Estimates (2013-17)

Salaries for Transportation & Warehousing Job Postings in 2018



Source: Labor Insight Jobs (Burning Glass Technologies)

Transportation & Material Moving Occupational Employment



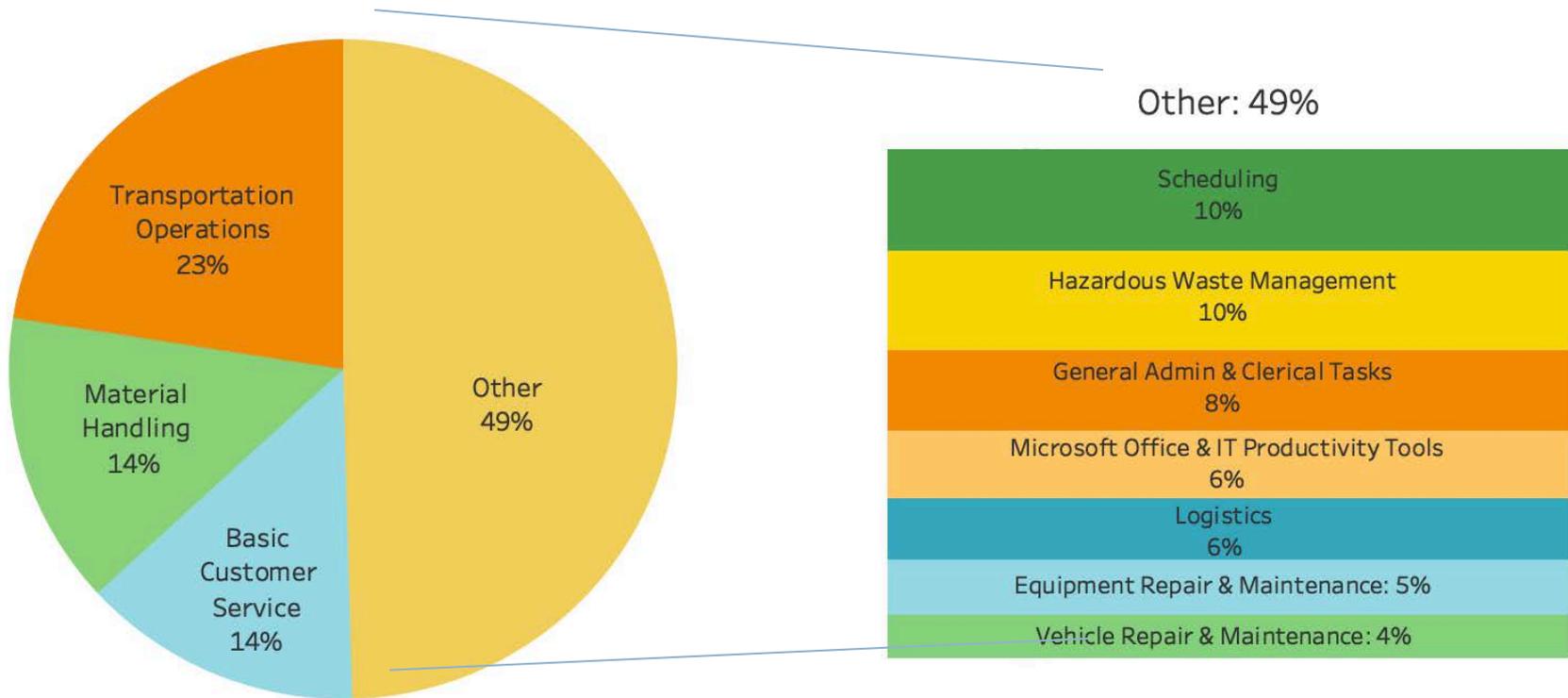
Source: Bureau of Labor Statistics, Occupational Employment Statistics database

Real Annual Mean Wage of Transportation & Material Moving Occupations

Occupation	2013 (Real\$ 2018)	2018
First-Line Supervisors	\$56,133	\$57,710
Heavy Truck Drivers	\$44,917	\$47,130
Light Truck/Delivery Services Drivers	\$38,665	\$38,010
Industrial Truck and Tractor Operators	\$37,673	\$36,520
Laborers & Freight Movers	\$30,817	\$38,480
Packers and Packagers	\$23,984	\$30,150
Other Transportation & Material Moving Occupations	\$36,303	\$41,237

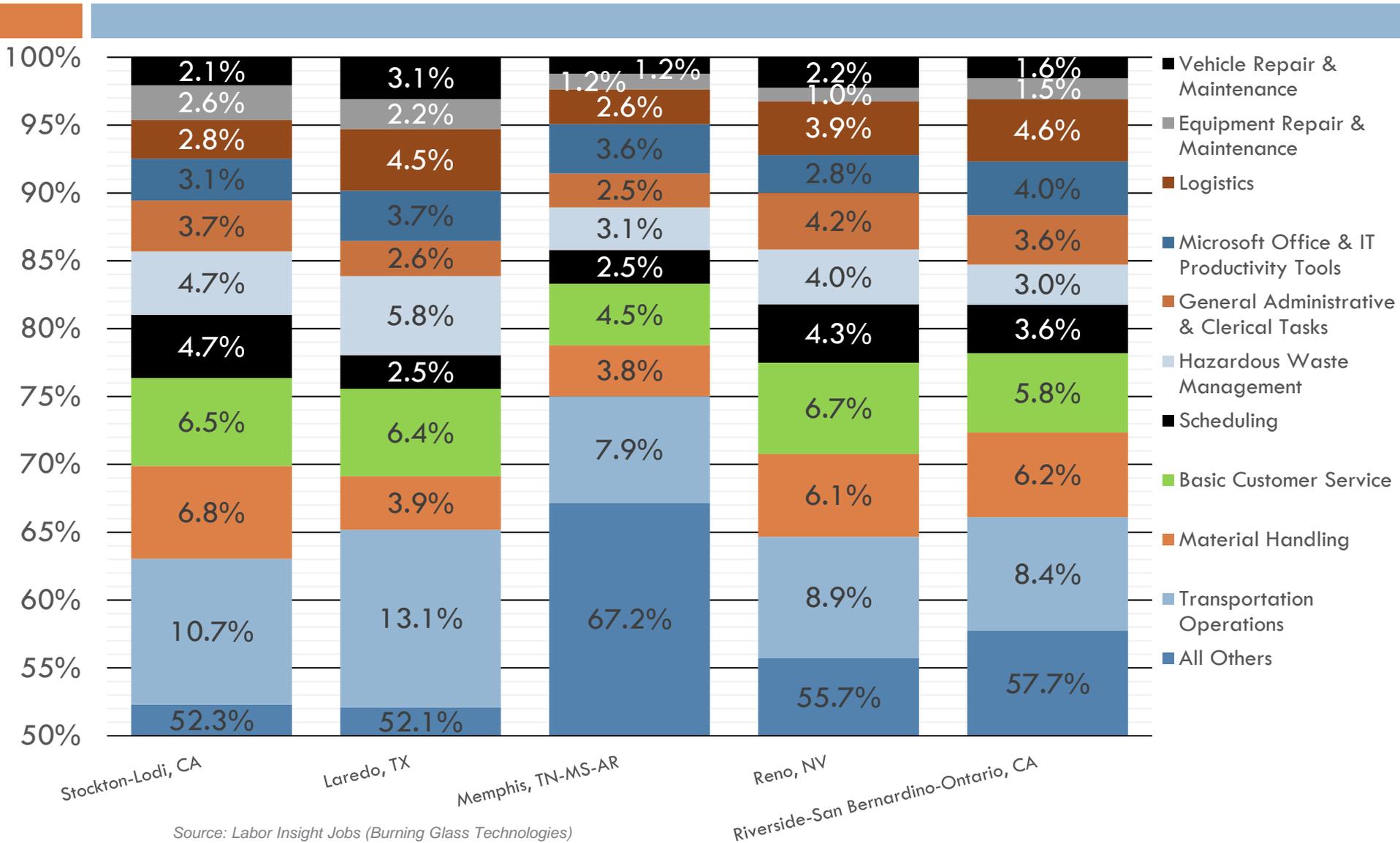
Source: Bureau of Labor Statistics, Occupational Employment Statistics database & Consumer Price Index

Skill Clusters in Transportation & Warehousing Jobs in 2018



Source: Labor Insight Jobs (Burning Glass Technologies)

Comparison of Skill Clusters in Transportation & Warehousing Jobs in 2018



Profile of Select Transportation & Warehousing Jobs in 2018

Occupation	2008 Job Postings	Median Salary	Location Quotient	LQ Rank (CA)	Projected Growth '16-'26
Tractor-Trailer Truck Driver	4,284	\$59k	2.7	#1	11.9%
Laborer / Warehouse Worker	1,558	\$26k	2.7	#1	15.6%
Forklift / Pallet Jack Operator	567	\$28k	5.8	#1	17.9%
Light Truck Delivery Driver	488	\$31k	2.3	#1	12.1%
Packager	94	\$23k	2.2	#2	6.2%

Source: Labor Insight Jobs (Burning Glass Technologies)

Policy Opportunities and Challenges

- Changing production geography of the NCMR
- Employment opportunities → sustained advancement
- New integrated business models transforming functions & roles of the goods movement system

THANK YOU!

For more information: go.pacific.edu/cbpr