

January 2017

# Food, Glorious Food!

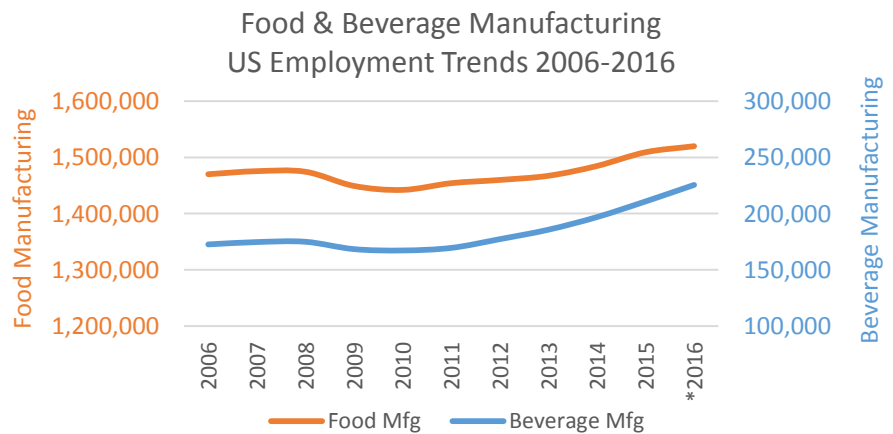
## Top Metros for the Food & Beverage Manufacturing Industry



*Whether you enjoyed the full array of holiday treats this season or you are one of the 45 percent of Americans who will make New Year's Resolutions about a diet, food and beverages are on the mind this time of year. The food and beverage industry is a generous slice of the nation's manufacturing employment.*

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Nearly 1.8 million people across the United States work in food and beverage manufacturing sectors as of June 2016 according to the Bureau of Labor Statistics. Employment trends show growth in this sector since 2010, increasing about six percent based on preliminary figures for 2016.



So where are these food and beverage manufacturing sector jobs? This white paper surveys Metropolitan Statistical Areas in the United States for the top food and beverage locations based on the number of employees working in the industry.

The top metro areas for food manufacturing, covering all activity under NAICS code 311 Food Manufacturing, are generally the most populous MSAs across the nation. All but one of the metro areas on the ranking below are within the top sixteen MSAs ranked by population. However, there's more to this story so keep reading!

### FOOD MANUFACTURING

The transformation of livestock and agricultural crops into products for consumption can be as simple as washing and packaging or a more complex process involving cooking, baking, etc.

The Fresno Metropolitan Statistical Area is the exception to the pattern of food production employment following population. Fresno is in proximity to other large metro areas; however, it also contains some of highly productive agricultural Central Valley. Fresno has higher concentration of food production workers as shown by the Location Quotient (LQ) of 3.2. The LQ displays the comparison of regional workers compared to the national rate of employment for that industry. The higher the LQ, the higher the specialization a region has for that particular

\* Average of Jan-Jun 2016

industry sector.

TOP METROS FOR FOOD MANUFACTURING EMPLOYMENT  
12-Month Average Employment Ending June 2016

METRO AREA	FOOD MANUFACTURING EMPLOYMENT (NAICS 311)	FOOD MANUFACTURING CONCENTRATION <sup>1</sup> (Location Quotient)	AVERAGE WEEKLY WAGE <sup>1</sup>
1 Chicago-Naperville-Elgin, IL-IN-WI MSA	50,569	1.06	\$1,055
2 New York-Newark-Jersey City, NY-NJ-PA MSA	50,248	0.52	\$830
3 Los Angeles-Long Beach-Anaheim, CA MSA	46,162	0.73	\$879
4 Atlanta-Sandy Springs-Roswell, GA MSA	25,222	0.94	\$1,456
5 Boston-Cambridge-Newton, MA-NH MSA	19,336	0.68	\$965
6 Dallas-Fort Worth-Arlington, TX MSA	19,067	0.53	\$954
7 San Francisco-Oakland-Hayward, CA MSA	15,793	0.64	\$976
8 Minneapolis-St. Paul-Bloomington, MN-WI MSA	14,824	0.73	\$879
9 Seattle-Tacoma-Bellevue, WA MSA	14,674	0.73	\$997
10 Fresno, CA MSA	12,891	3.2	\$696

Now, if we review the regions based on the concentration, or LQ, the ranking becomes a vastly different list. These metros tend to be mid-sized or small in regards to population but have a high concentration of food manufacturing workers.

Gainesville, GA tops the list with more than ten thousand employees in the MSA and a LQ of 11.51 (primarily poultry related). The remaining nine areas dispersed around the country from Gettysburg, PA to central California’s Hanford.

LOCATION QUOTIENT

Location Quotient (LQ) is basically a way of quantifying how concentrated a particular industry is in a region as compared to the nation. It can reveal what makes a particular region “unique” in comparison to the national average.

TOP METROS FOR FOOD MANUFACTURING CONCENTRATION  
12-Month Average Employment Ending June 2016

METRO AREA	FOOD MANUFACTURING EMPLOYMENT (NAICS 311)	FOOD MANUFACTURING CONCENTRATION <sup>1</sup> (Location Quotient)	AVERAGE WEEKLY WAGE <sup>1</sup>
1 Gainesville, GA MSA	10,074	11.51	\$659
2 Decatur, IL MSA	5,488	10.69	\$1,873
3 Sioux City, IA-NE-SD MSA	5,247	10.64	\$951
4 Hanford-Corcoran, CA MSA	4,234	9.04	\$817
5 Grand Island, NE MSA	3,963	8.93	\$765
6 Merced, CA MSA	6,767	7.79	\$878
7 St. Joseph, MO-KS MSA	3,294	7.44	\$872
8 Gettysburg, PA MSA	2,594	6.99	\$838
9 Fort Smith, AR-OK MSA	7,945	6.96	\$710
10 Goldsboro, NC MSA	2,643	6.03	\$695



## BEVERAGE PRODUCTION

Beverage manufacturing includes:

- soft drinks production
- ice manufacturing
- purifying & bottling water
- breweries
- wineries
- distilleries

Then there's beverage production. Beverage manufacturing has a strong presence in California with six of the top ten metro areas for this sector located in the state. The Napa region ranks number one on this list with an average of 9,544 employees engaged in primarily wine production. As well-known as the region is for wine, it is no surprise that the LQ of 73.89 shows concentrated employment in the beverage industry.

### TOP METROS FOR BEVERAGE MANUFACTURING

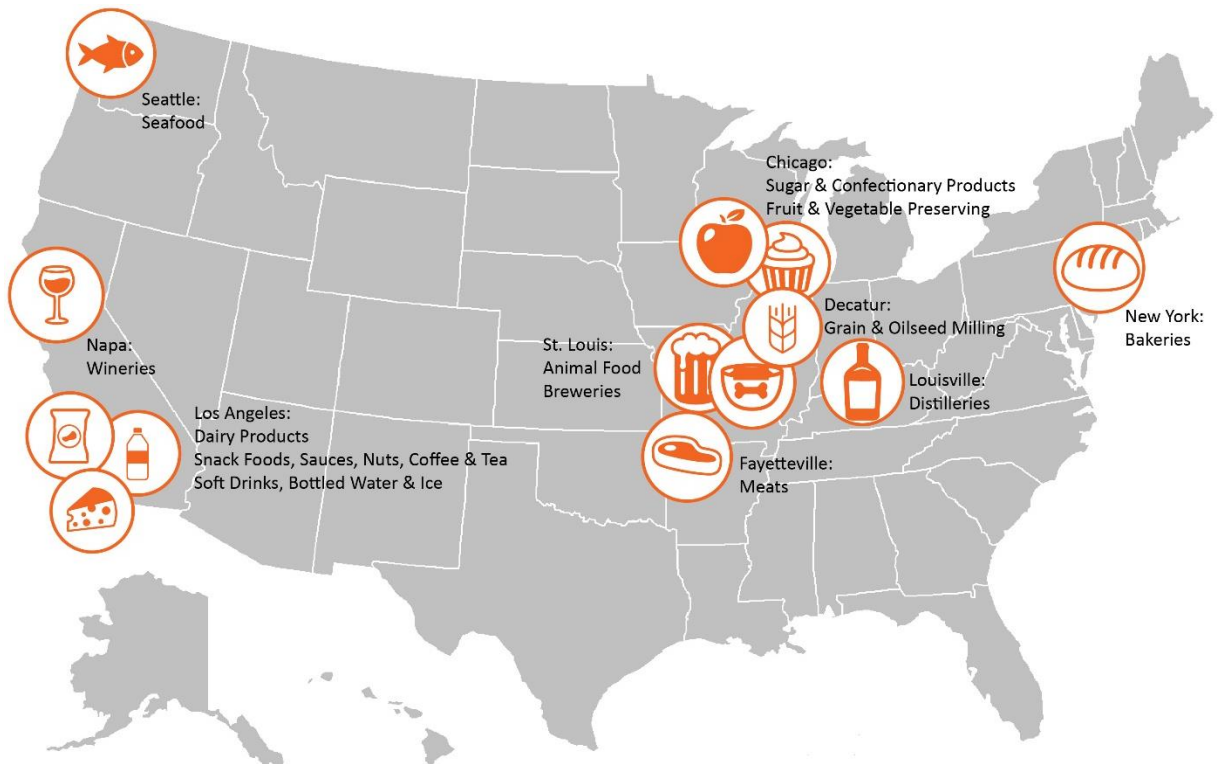
12-Month Average Employment Ending June 2016

METRO AREA	BEVERAGE MANUFACTURING EMPLOYMENT (NAICS 311)	BEVERAGE MANUFACTURING CONCENTRATION <sup>1</sup> (Location Quotient)	AVERAGE WEEKLY WAGE <sup>1</sup>
1 Napa, CA MSA	9,544	73.89	\$1,209
2 Santa Rosa, CA MSA	7,782	22.93	\$1,041
3 St. Louis, MO-IL MSA	4,579	2.21	\$1,455
4 Dallas-Fort Worth-Arlington, TX MSA	4,259	0.76	\$1,209
5 Denver-Aurora-Lakewood, CO MSA	4,029	1.90 <sup>2</sup>	\$1,238 <sup>2</sup>
6 Modesto, CA MSA	3,714	12.10	\$1,305
7 San Francisco-Oakland-Hayward, CA MSA	3,654	1.00	\$997
8 Riverside-San Bernardino-Ontario, CA MSA	3,587	1.59	\$807
9 Seattle-Tacoma-Bellevue, WA MSA	3,216	1.14 <sup>3</sup>	\$943 <sup>3</sup>
10 Cincinnati, OH-KY-IN MSA	2,857	1.86	\$1,074

Taking the cue from Napa CA having a specialization in wine, the top metro areas for subsectors of food and beverage production were explored. Several areas followed suit with a strong concentration such as Decatur, IL ranking first in Grain & Oilseed Milling employing just over 5,500 people however having an extremely high employment LQ of 270. Napa showed an even stronger concentration within Wineries than it did in the Beverage category. Louisville, KY had the third highest LQ of 30.37 for distilleries employment reflecting its recognized bourbon heritage.

FOOD & BEVERAGE MANUFACTURING: SUBSECTOR RANKING  
Employment Average 2<sup>nd</sup> Quarter 2016

INDUSTRY SUBSECTOR	METRO AREA	AVERAGE EMPLOYMENT <sup>1</sup>	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVERAGE WEEKLY WAGE <sup>1</sup>
Animal Food	St. Louis, MO-IL MSA	2,330	4.39	\$1,722
Grain & Oilseed Milling	Decatur, IL MSA	5,520	270.11	\$1,893
Sugar & Confectionary Products	Chicago-Naperville-Elgin, IL-IN-WI MSA	6,070	2.75	\$1,315
Fruit & Vegetable Preserving	Chicago-Naperville-Elgin, IL-IN-WI MSA	4,608	0.85	\$1,352
Dairy Products	Los Angeles-Long Beach-Anaheim, CA MSA	5,223	0.88	\$1,464
Meats	Fayetteville-Springdale-Rogers, AR-MO MSA	10,054	12.99	\$639
Seafood	Seattle-Tacoma-Bellevue, WA MSA	3,787	7.52	\$1,450
Bakeries	New York-Newark-Jersey City, NY-NJ-PA MSA	27,520	1.41	\$609
Snack Foods, Sauces, Nuts, Coffee & Tea	Los Angeles-Long Beach-Anaheim, CA MSA	11,412	1.34	\$939
Soft Drinks, Bottled Water & Ice	Los Angeles-Long Beach-Anaheim, CA MSA	4,932	1.14	\$1,126
Breweries	St. Louis, MO-IL MSA	2,729	5.24	\$1,865
Wineries	Napa, CA MSA	9,447	282.47	\$1,209
Distilleries	Louisville-Jefferson County, KY-IN MSA	1,631	30.37	\$4,263 <sup>4</sup>



The table below lists U.S. Metro Areas with average employment within Food and Beverage Manufacturing, average annual wages for the industries; and location quotient for employment in this sector compared to the sector's employment nationally.

Location quotient is an excellent tool to quantify how concentrated an industry sector or occupation is in a region as compared to the nation. A location quotient of 1.2 or higher indicates a concentration or specialization of the industry or occupation.

**Metro Areas not listed below are excluded due to lack of data from the Bureau of Labor Statistics within the last 12 months. Please see end notes for additional information.**

## FOOD & BEVERAGE MANUFACTURING IN METROPOLITAN STATISTICAL AREAS

Industry Employment: 12-Month Average Ending June 2016

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
Abilene, TX MSA	559	0.82	\$545	240	2.31 <sup>8</sup>	\$830 <sup>8</sup>
Akron, OH MSA	1,646	0.41	\$718	706	1.67	\$856
Albany, GA MSA	888	1.44	\$914	5	6	5
Albany, OR MSA	703	1.38	\$971	44	0.67	\$329
Albany-Schenectady-Troy, NY MSA	1,673	0.35 <sup>2</sup>	\$847 <sup>2</sup>	631	0.87	\$1,135
Albuquerque, NM MSA	2,122	0.55	\$694	5	6	5
Alexandria, LA MSA	116	0.17	\$575	5	6	5
Allentown-Bethlehem-Easton, PA-NJ MSA	2,947	0.78	\$1,093	5	6	5
Altoona, PA MSA	1,651	2.65	\$659	49	0.46	\$665
Amarillo, TX MSA	5,480	4.43	\$732	35	0.19	\$637
Ames, IA MSA	578	1.17	\$1,005	44	0.76	\$330
Anchorage, AK MSA	687	0.34	\$624	5	6	5
Ann Arbor, MI MSA	848	0.39	\$814	57	0.24	\$360
Anniston-Oxford-Jacksonville, AL MSA	136	0.29	\$965	5	6	5
Appleton, WI MSA	4,902	3.75	\$941	5	6	5
Asheville, NC MSA	763	0.39 <sup>2</sup>	\$709 <sup>2</sup>	1,089	3.94 <sup>8</sup>	\$589 <sup>8</sup>
Atlanta-Sandy Springs-Roswell, GA MSA	25,222	0.94	\$1,456	5	6	5
Atlantic City-Hammonton, NJ MSA	352	0.18	\$482	83	0.42	\$389
Auburn-Opelika, AL MSA	151	0.25	\$871	15	0.19	\$404
Augusta-Richmond County, GA-SC MSA	1,249	0.59	\$885	5	6	5
Austin-Round Rock, TX MSA	5	6	5	1,144	.78 <sup>8</sup>	\$3,565 <sup>8</sup>
Bakersfield, CA MSA	5,805	1.67	\$822	348	0.62	\$713
Baltimore-Columbia-Towson, MD MSA	9,294	0.66	\$1,006	1,280	0.59	\$1,141
Bangor, ME MSA	318	0.40	\$450	25	0.56	\$376
Barnstable Town, MA MSA	458	0.47	\$659	45	0.31	\$562
Baton Rouge, LA MSA	1,413	0.34	\$836	584	1.00 <sup>2</sup>	\$1,047 <sup>2</sup>
Battle Creek, MI MSA	1,367	2.18	\$1,644	159	1.64	\$593
Bay City, MI MSA	929	2.13	\$799	5	6	5
Beaumont-Port Arthur, TX MSA	5	6	5	60	0.25 <sup>2</sup>	\$898 <sup>2</sup>
Beckley, WV MSA	5	6	5	37	0.54 <sup>2</sup>	\$1,045 <sup>2</sup>
Bellingham, WA MSA	2,003	2.16	\$753	171	1.37	\$434
Bend-Redmond, OR MSA	413	0.53	\$481	630	5.23	\$819
Binghamton, NY MSA	809	0.73	\$917	4	0.02	\$476
Birmingham-Hoover, AL MSA	4,052	0.78	\$757	5	6	5

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
Bismarck, ND MSA	5	6	5	122	1.00	\$916
Blacksburg-Christiansburg-Radford, VA MSA	387	0.55	\$707	102	.90 <sup>8</sup>	\$427 <sup>8</sup>
Bloomington, IL MSA	937	0.97	\$833	5	6	5
Boise City, ID MSA	4,601	1.42	\$926	352	0.80	\$500
Boston-Cambridge-Newton, MA-NH MSA	19,336	0.68	\$965	2,669	0.65 <sup>8</sup>	\$1,187 <sup>8</sup>
Boulder, CO MSA	1,856	0.98	\$872	5	6	5
Bremerton-Silverdale, WA MSA	256	0.33	\$434	67	0.58	\$489
Bridgeport-Stamford-Norwalk, CT MSA	1,621	0.35	\$805	314	0.46	\$1,602
Brownsville-Harlingen, TX MSA	1,176	0.74	\$616	61	0.27	\$1,078
Brunswick, GA MSA	638	1.27	\$876	5	6	5
Buffalo-Cheektowaga-Niagara Falls, NY MSA	4,881	0.83	\$993	5	6	5
Burlington, NC MSA	217	0.34	\$543	5	6	5
Burlington-South Burlington, VT MSA	5	6	5	236	1.36	\$668
Canton-Massillon, OH MSA	5	6	5	89	0.35	\$798
Cape Coral-Fort Myers, FL MSA	399	0.16	\$884	61	0.15	\$729
Cape Girardeau, MO-IL MSA	321	0.68	\$897	34	0.45	\$167
Carson City, NV MSA	244	0.80	\$759	5	6	5
Casper, WY MSA	31	0.05	\$347	5	6	5
Cedar Rapids, IA MSA	3,941	2.54	\$1,363	259	0.98	\$861
Chambersburg-Waynesboro, PA MSA	1,400	2.20	\$992	35	0.44	\$373
Champaign-Urbana, IL MSA	1,955	1.81	\$642	133	0.80	\$674
Charleston, WV MSA	235	0.21	\$744	5	6	5
Charleston-North Charleston, SC MSA	532	0.16	\$573	5	6	5
Charlotte-Concord-Gastonia, NC-SC MSA	9,501	0.80	\$803	5	6	5
Charlottesville, VA MSA	206	0.17 <sup>8</sup>	\$468 <sup>8</sup>	899	5.42	\$539
Chattanooga, TN-GA MSA	4,747	1.79	\$932	365	0.84	\$1,045
Cheyenne, WY MSA	30	0.06	\$352	12	0.19	\$540
Chicago-Naperville-Elgin, IL-IN-WI MSA	50,569	1.06	\$1,055	5	6	5
Chico, CA MSA	1,193	1.38	\$764	5	6	5
Cincinnati, OH-KY-IN MSA	12,494	1.13	\$980	2,857	1.86	\$1,074
Cleveland, TN MSA	5	6	5	362	5.20 <sup>8</sup>	\$897 <sup>8</sup>
Cleveland-Elyria, OH MSA	5,739	0.53	\$794	801	0.51	\$735
Coeur d'Alene, ID MSA	93	0.14	\$345	137	1.59	\$632
College Station-Bryan, TX MSA	1,472	1.23 <sup>2</sup>	\$570 <sup>2</sup>	187	1.07	\$591
Columbia, MO MSA	794	0.76	\$856	56	0.41	\$693
Columbia, SC MSA	4,772	1.14	\$707	321	.55 <sup>8</sup>	\$840 <sup>8</sup>
Columbus, GA-AL MSA	2,486	1.98	\$612	5	6	5
Columbus, IN MSA	471	0.85	\$806	49	0.85	\$282
Columbus, OH MSA	7,562	0.69	\$1,221	2,021	1.28	\$1,060
Corpus Christi, TX MSA	1,220	0.62	\$685	5	6	5
Corvallis, OR MSA	59	0.14	\$339	102	1.83	\$636
Crestview-Fort Walton Beach-Destin, FL MSA	161	0.14 <sup>8</sup>	\$562 <sup>8</sup>	32	0.20	\$506
Cumberland, MD-WV MSA	111	0.27	\$744	5	6	5
Dallas-Fort Worth-Arlington, TX MSA	19,067	0.53	\$954	4,259	0.76	\$1,209
Danville, IL MSA	1,069	3.54	\$1,148	5	6	5
Daphne-Fairhope-Foley, AL MSA	295	0.32	\$626	33	0.40	\$455
Davenport-Moline-Rock Island, IA-IL MSA	4,858	2.44 <sup>2</sup>	\$866 <sup>2</sup>	232	0.83	\$518



METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
Dayton, OH MSA	2,673	0.67	\$870	495	0.87	\$762
Decatur, IL MSA	5,488	10.69	\$1,873	5	6	5
Deltona-Daytona Beach-Ormond Beach, FL MSA	386	0.19 <sup>8</sup>	\$663 <sup>8</sup>	5	6	5
Denver-Aurora-Lakewood, CO MSA	9,168	0.59	\$923	4,029	1.90 <sup>2</sup>	\$1,238 <sup>2</sup>
Des Moines-West Des Moines, IA MSA	4,788	1.24 <sup>8</sup>	\$902 <sup>8</sup>	557	1.00	\$869
Detroit-Warren-Dearborn, MI MSA	6,886	0.35 <sup>7</sup>	\$688 <sup>7</sup>	5	6	5
Dothan, AL MSA	1,022	1.90	\$748	5	6	5
Dover, DE MSA	2,240	3.23	\$815	73	0.66	\$441
Dubuque, IA MSA	960	1.53	\$956	39	0.51	\$393
East Stroudsburg, PA MSA	101	0.15	\$669	104	1.15 <sup>2</sup>	\$581 <sup>2</sup>
Eau Claire, WI MSA	1,275	1.46	\$1,092	285	2.3 <sup>8</sup>	\$641 <sup>8</sup>
El Centro, CA MSA	708	1.23	\$654	5	6	5
Elizabethtown-Fort Knox, KY MSA	24	0.04	\$454	5	6	5
Elkhart-Goshen, IN MSA	1,277	0.94	\$721	5	6	5
Elmira, NY MSA	5	6	5	26	0.43	\$725
El Paso, TX MSA	5	6	5	514	1.12	\$830
Erie, PA MSA	1,609	1.18	\$854	231	1.14	\$563
Eugene, OR MSA	1,885	1.16	\$775	5	6	5
Evansville, IN-KY MSA	4,312	2.61	\$943	198	0.87	\$556
Fairbanks, AK MSA	45	0.17	\$424	120	2.07	\$494
Fargo, ND-MN MSA	1,386	0.89	\$931	103	0.44	\$749
Farmington, NM MSA	53	0.10	\$323	30	0.39	\$549
Fayetteville-Springdale-Rogers, AR-MO MSA	5	6	5	224	0.61	\$567
Flagstaff, AZ MSA	446	0.69	\$1,132	84	0.97	\$495
Flint, MI MSA	316	0.24	\$541	5	6	5
Florence, SC MSA	531	0.75	\$612	5	6	5
Florence-Muscle Shoals, AL MSA	126	0.24	\$635	5	6	5
Fond du Lac, WI MSA	1,819	3.63	\$863	5	6	5
Fort Collins, CO MSA	588	0.37	\$765	1,411	5.65	\$1,300
Fort Smith, AR-OK MSA	7,945	6.96	\$710	5	6	5
Fort Wayne, IN MSA	5	6	5	20	0.07 <sup>3</sup>	\$482 <sup>3</sup>
Fresno, CA MSA	12,891	3.20	\$696	1,529	2.30	\$972
Gadsden, AL MSA	1,325	3.51	\$637	5	6	5
Gainesville, FL MSA	78	0.07	\$288	5	6	5
Gainesville, GA MSA	10,074	11.51	\$659	222	1.87	\$1,024
Gettysburg, PA MSA	2,594	6.99	\$838	5	6	5
Glens Falls, NY MSA	139	0.25	\$518	57	0.71 <sup>2</sup>	\$539 <sup>2</sup>
Goldsboro, NC MSA	2,643	6.03	\$695	5	6	5
Grand Forks, ND-MN MSA	1,286	1.90	\$951	5	6	5
Grand Island, NE MSA	3,963	8.93	\$765	75	1.14	\$550
Grand Junction, CO MSA	190	0.28	\$629	204	2.16	\$400
Grand Rapids-Wyoming, MI MSA	10,489	1.79	\$959	5	6	5
Grants Pass, OR MSA	218	0.73	\$354	75	1.79	\$439
Great Falls, MT MSA	387	0.91	\$985	53	0.92	\$500
Greeley, CO MSA	5,050	4.82	\$772	61	0.46	\$331
Green Bay, WI MSA	6,737	3.82	\$858	116	0.45	\$372
Greenville, NC MSA	73	0.09	\$509	5	6	5
Greenville-Anderson-Mauldin, SC MSA	2,312	0.56	\$654	103	0.17	\$615
Gulfport-Biloxi-Pascagoula, MS MSA	5	6	5	65	0.27	\$714
Hagerstown-Martinsburg, MD-WV	353	0.35	\$619	5	6	5

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
MSA						
Hammond, LA MSA	1,053	2.32	\$581	3	0.07	\$533
Hanford-Corcoran, CA MSA	4,234	9.04	\$817	5	6	5
Harrisburg-Carlisle, PA MSA	5,939	1.69	\$906	453	0.90	\$776
Hartford-West Hartford-East Hartford, CT MSA	2,707	0.40	\$842	5	6	5
Hilton Head Island-Bluffton-Beaufort, SC MSA	5	6	5	32	0.27 <sup>2</sup>	\$729 <sup>2</sup>
Hot Springs, AR MSA	67	0.17	\$886	5	6	5
Houma-Thibodaux, LA MSA	501	0.51	\$781	44	0.34	\$690
Houston-The Woodlands-Sugar Land, TX MSA	11,380	0.37 <sup>7</sup>	\$802 <sup>7</sup>	5	6	5
Huntington-Ashland, WV-KY-OH MSA	446	0.29	\$720	5	6	5
Huntsville, AL MSA	169	0.07	\$427	67	0.28	\$429
Idaho Falls, ID MSA	1,329	1.57	\$854	63	0.57	\$708
Indianapolis-Carmel-Anderson, IN MSA	7,274	0.67	\$958	2,196	1.41	\$852
Iowa City, IA MSA	537	0.55	\$656	100	0.65	\$354
Ithaca, NY MSA	179	0.31	\$553	90	1.20	\$677
Jackson, MI MSA	959	1.53	\$1,498	5	6	5
Jackson, MS MSA	3,600	1.31	\$546	133	0.29	\$794
Jacksonville, FL MSA	1,500	0.22	\$1,022	5	6	5
Jacksonville, NC MSA	164	0.32	\$508	5	6	5
Janesville-Beloit, WI MSA	1,930	2.88	\$951	5	6	5
Jefferson City, MO MSA	1,010	1.24	\$748	5	6	5
Johnson City, TN MSA	88	0.10	\$707	214	1.73	\$951
Johnstown, PA MSA	400	0.72	\$680	148	1.72	\$838
Jonesboro, AR MSA	2,080	3.67	\$860	5	6	5
Joplin, MO MSA	4,030	4.50	\$876	5	6	5
Kahului-Wailuku-Lahaina, HI MSA	643	0.70	\$636	118	0.96	\$763
Kalamazoo-Portage, MI MSA	1,455	1.04	\$907	614	2.87	\$957
Kankakee, IL MSA	1,287	2.90	\$1,106	5	6	5
Kansas City, MO-KS MSA	7,373	0.67	\$1,089	5	6	5
Kennewick-Richland, WA MSA	4,334	3.35	\$705	5	6	5
Killeen-Temple, TX MSA	574	0.38	\$830	169	0.72	\$716
Kingsport-Bristol-Bristol, TN-VA MSA	505	0.42	\$732	61	0.37	\$406
Kingston, NY MSA	473	0.68	\$501	211	2.13	\$862
Knoxville, TN MSA	2,487	0.62	\$992	828	1.49	\$881
Kokomo, IN MSA	149	0.37	\$651	5	6	5
La Crosse-Onalaska, WI-MN MSA	1,475	1.97	\$766	577	4.61	\$966
Lafayette, LA MSA	2,726	1.41	\$731	73	0.28	\$552
Lake Charles, LA MSA	119	0.11	\$749	5	6	5
Lake Havasu City-Kingman, AZ MSA	5	6	5	54	0.82	\$674
Lakeland-Winter Haven, FL MSA	4,418	2.02	\$880	290	0.89	\$860
Lancaster, PA MSA	7,396	2.87	\$999	5	6	5
Lansing-East Lansing, MI MSA	546	0.24	\$799	201	0.60	\$1,337
Laredo, TX MSA	156	0.14	\$396	5	6	5
Las Cruces, NM MSA	577	0.65	\$587	52	0.45	\$528
Las Vegas-Henderson-Paradise, NV MSA	3,205	0.32	\$713	5	6	5
Lawrence, KS MSA	230	0.43	\$990	5	6	5
Lebanon, PA MSA	2,669	5.22	\$715	33	0.42	\$275
Lewiston, ID-WA MSA	8	0.03 <sup>8</sup>	\$433 <sup>8</sup>	12	0.28	\$305



METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
Lewiston-Auburn, ME MSA	399	0.76	\$798	499	6.26	\$1,034
Lexington-Fayette, KY MSA	1,233	0.44	\$1,128	745	1.76	\$814
Lima, OH MSA	1,231	2.28	\$780	5	6	5
Lincoln, NE MSA	1,762	0.92	\$769	5	6	5
Little Rock-North Little Rock-Conway, AR MSA	1,152	0.32	\$786	440	0.81	\$721
Longview, WA MSA	908	2.24	\$705	13	0.20	\$191
Los Angeles-Long Beach-Anaheim, CA MSA	46,162	0.73	\$879	5	6	5
Louisville/Jefferson County, KY-IN MSA	6,938	1.00	\$963	5	6	5
Lubbock, TX MSA	1,009	0.65	\$738	187	0.79	\$977
Lynchburg, VA MSA	5	6	5	26	0.20	\$327
Macon, GA MSA	182	0.18	\$668	5	6	5
Madera, CA MSA	674	1.27	\$717	208	2.23	\$1,045
Madison, WI MSA	5,183	1.24	\$916	5	6	5
Manchester-Nashua, NH MSA	479	0.23	\$633	412	1.33	\$1,279
Manhattan, KS MSA	75	0.17 <sup>8</sup>	\$501 <sup>8</sup>	5	6	5
Mankato-North Mankato, MN MSA	5	6	5	156	1.75	\$793
Mansfield, OH MSA	329	0.58	\$550	109	1.28	\$772
McAllen-Edinburg-Mission, TX MSA	1,578	0.47	\$666	5	6	5
Medford, OR MSA	1,429	1.49	\$642	263	2.00	\$544
Memphis, TN-MS-AR MSA	5,222	0.82	\$1,193	5	6	5
Merced, CA MSA	6,767	7.79	\$878	5	6	5
Miami-Fort Lauderdale-West Palm Beach, FL MSA	9,157	0.34	\$855	2,173	0.60	\$908
Michigan City-La Porte, IN MSA	1,324	2.97	\$807	23	0.38	\$414
Midland, MI MSA	23	0.07	\$312	5	6	5
Midland, TX MSA	55	0.04	\$539	5	6	5
Milwaukee-Waukesha-West Allis, WI MSA	10,294	1.15	\$840	5	6	5
Minneapolis-St. Paul-Bloomington, MN-WI MSA	14,824	0.73	\$879	2,455	0.85	\$872
Missoula, MT MSA	348	0.55	\$480	249	2.62	\$408
Mobile, AL MSA	1,042	0.63	\$512	5	6	5
Modesto, CA MSA	9,170	4.67	\$832	3,714	12.10	\$1,305
Monroe, MI MSA	68	0.15	\$514	5	6	5
Montgomery, AL MSA	1,983	1.10	\$668	5	6	5
Morristown, TN MSA	1,753	3.71	\$1,684	5	6	5
Mount Vernon-Anacortes, WA MSA	1,374	2.76	\$742	69	0.88	\$913
Muncie, IN MSA	118	0.21	\$510	5	6	5
Muskegon, MI MSA	522	0.78	\$839	5	6	5
Myrtle Beach-Conway-North Myrtle Beach, SC-NC MSA	145	0.09	\$371	202	.78 <sup>8</sup>	\$670 <sup>8</sup>
Napa, CA MSA	634	0.53	\$993	9,544	73.89	\$1,209
Naples-Immokalee-Marco Island, FL MSA	46	0.04	\$396	5	6	5
Nashville-Davidson--Murfreesboro--Franklin, TN MSA	7,593	0.79	\$878	900	0.65	\$736
New Haven-Milford, CT MSA	2,190	0.57	\$736	154	0.31	\$535
New Orleans-Metairie, LA MSA	4,269	0.71 <sup>2</sup>	\$1,136 <sup>2</sup>	5	6	5
New York-Newark-Jersey City, NY-NJ-PA MSA	50,248	0.52	\$830	5	6	5
Niles-Benton Harbor, MI MSA	274	0.38	\$656	303	3.03 <sup>2</sup>	\$386 <sup>2</sup>

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
North Port-Sarasota-Bradenton, FL MSA	1,348	0.45	\$1,364	5	6	5
Norwich-New London, CT MSA	168	0.14	\$391	80	0.47	\$507
Ocala, FL MSA	472	0.44	\$643	5	6	5
Ocean City, NJ MSA	326	0.90	\$557	172	3.02	\$423
Odessa, TX MSA	88	0.11	\$427	5	6	5
Ogden-Clearfield, UT MSA	5	6	5	138	0.38 <sup>3</sup>	\$951 <sup>3</sup>
Oklahoma City, OK MSA	3,549	0.55 <sup>7</sup>	\$750 <sup>7</sup>	1,227	1.23	\$762
Olympia-Tumwater, WA MSA	370	0.32	\$579	332	1.86	\$1,028
Omaha-Council Bluffs, NE-IA MSA	11,859	2.30	\$822	286	0.41	\$830
Orlando-Kissimmee-Sanford, FL MSA	4,642	0.38	\$725	5	6	5
Oshkosh-Neenah, WI MSA	239	0.25	\$908	87	0.67	\$856
Oxnard-Thousand Oaks-Ventura, CA MSA	1,072	0.30	\$1,123	369	0.73	\$739
Palm Bay-Melbourne-Titusville, FL MSA	158	0.06	\$450	113	0.53	\$789
Panama City, FL MSA	48	0.06	\$562	14	0.11	\$891
Parkersburg-Vienna, WV MSA	49	0.12	\$404	5	6	5
Pensacola-Ferry Pass-Brent, FL MSA	94	0.06	\$385	5	6	5
Peoria, IL MSA	5	6	5	214	0.81 <sup>7</sup>	\$676 <sup>7</sup>
Phoenix-Mesa-Scottsdale, AZ MSA	11,475	0.57	\$768	5	6	5
Pittsburgh, PA MSA	5,211	0.44 <sup>2</sup>	\$781 <sup>2</sup>	5	6	5
Pittsfield, MA MSA	149	0.21	\$574	95	0.94	\$811
Pocatello, ID MSA	365	1.06	\$726	5	6	5
Portland-South Portland, ME MSA	2,306	0.82	\$714	748	1.78	\$948
Portland-Vancouver-Hillsboro, OR-WA MSA	12,676	1.03	\$861	5	6	5
Port St. Lucie, FL MSA	775	0.50	\$1,057	36	0.17	\$642
Prescott, AZ MSA	45	0.07	\$326	5	6	5
Providence-Warwick, RI-MA MSA	5,848	0.78 <sup>2</sup>	\$795 <sup>2</sup>	498	0.48 <sup>7</sup>	\$959 <sup>7</sup>
Provo-Orem, UT MSA	5	6	5	27	0.08 <sup>3</sup>	\$901 <sup>3</sup>
Pueblo, CO MSA	321	0.47	\$728	7	0.07	\$718
Racine, WI MSA	1,201	1.45	\$905	5	6	5
Raleigh, NC MSA	5	6	5	833	0.89	\$704
Rapid City, SD MSA	147	0.21	\$507	5	6	5
Reading, PA MSA	3,617	1.93	\$950	259	0.82	\$531
Redding, CA MSA	141	0.22	\$459	86	0.81	\$844
Reno, NV MSA	1,873	0.80	\$815	5	6	5
Richmond, VA MSA	2,755	0.41	\$887	5	6	5
Riverside-San Bernardino-Ontario, CA MSA	8,940	0.61	\$939	3,587	1.59	\$807
Roanoke, VA MSA	441	0.26	\$825	594	2.39	\$832
Rochester, MN MSA	2,081	1.86	\$929	12	0.06 <sup>2</sup>	\$297 <sup>2</sup>
Rochester, NY MSA	5,274	0.94	\$903	5	6	5
Rome, GA MSA	1,237	3.06	\$1,036	5	6	5
Sacramento--Roseville--Arden-Arcade, CA MSA	4,143	0.38	\$1,019	1,914	1.29	\$823
Saginaw, MI MSA	401	0.46	\$830	5	6	5
St. Cloud, MN MSA	2,949	2.70	\$779	5	6	5
St. George, UT MSA	168	0.31	\$593	13	0.16	\$593
St. Joseph, MO-KS MSA	4,392	7.44	\$872	5	6	5
St. Louis, MO-IL MSA	9,201	0.66	\$1,023	4,579	2.21	\$1,455

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
Salem, OR MSA	4,966	2.73	\$617	5	6	5
Salinas, CA MSA	2,029	0.89	\$749	907	2.57	\$984
Salisbury, MD-DE MSA	7,936	4.53	\$709	5	6	5
Salt Lake City, UT MSA	5,571	0.74	\$809	622	0.55	\$930
San Antonio-New Braunfels, TX MSA	7,232	0.69 <sup>2</sup>	\$919 <sup>2</sup>	5	6	5
San Diego-Carlsbad, CA MSA	5,868	0.38	\$696	5	6	5
San Francisco-Oakland-Hayward, CA MSA	15,793	0.64	\$976	3,654	1.00	\$997
San Jose-Sunnyvale-Santa Clara, CA MSA	3,999	0.34	\$737	1,122	0.65	\$1,192
San Luis Obispo-Paso Robles-Arroyo Grande, CA MSA	601	0.51	\$620	1,883	9.80	\$813
Santa Cruz-Watsonville, CA MSA	1,641	1.52	\$743	263	1.86	\$569
Santa Fe, NM MSA	202	0.32	\$458	120	1.41	\$525
Santa Maria-Santa Barbara, CA MSA	703	0.33	\$601	1,667	4.95	\$687
Santa Rosa, CA MSA	3,911	1.91	\$1,002	7,782	22.93	\$1,041
Savannah, GA MSA	885	0.51	\$1,213	5	6	5
Seattle-Tacoma-Bellevue, WA MSA	14,674	0.73	\$997	3,216	1.14 <sup>3</sup>	\$943 <sup>3</sup>
Sebastian-Vero Beach, FL MSA	140	0.22	\$833	9	0.13 <sup>3</sup>	\$289 <sup>3</sup>
Sebring, FL MSA	18	0.06	\$606	5	6	5
Sheboygan, WI MSA	2,670	3.86	\$1,157	75	0.76	\$702
Sherman-Denison, TX MSA	1,216	2.55	\$707	85	1.21	\$837
Shreveport-Bossier City, LA MSA	5	6	5	243	.85 <sup>8</sup>	\$840 <sup>8</sup>
Sierra Vista-Douglas, AZ MSA	160	0.49	\$426	57	0.94	\$574
Sioux City, IA-NE-SD MSA	10,494	10.64	\$951	350	2.57 <sup>8</sup>	\$859 <sup>8</sup>
Sioux Falls, SD MSA	3,998	2.41	\$901	23	0.14	\$312
South Bend-Mishawaka, IN-MI MSA	5	6	5	74	0.44	\$353
Springfield, IL MSA	210	0.16	\$698	5	6	5
Springfield, MA MSA	1,898	0.65	\$1,054	40	0.10	\$598
Springfield, MO MSA	5	6	5	79	0.25	\$625
Springfield, OH MSA	643	1.54	\$902	5	6	5
State College, PA MSA	190	0.26	\$388	213	1.92	\$941
Staunton-Waynesboro, VA MSA	1,915	3.65	\$1,068	67	0.82	\$702
Stockton-Lodi, CA MSA	5,543	2.21	\$1,189	2,032	5.27	\$968
Sumter, SC MSA	1,295	2.92	\$558	5	6	5
Syracuse, NY MSA	1,569	0.48	\$879	5	6	5
Tallahassee, FL MSA	104	0.07	\$304	16	0.07	\$528
Tampa-St. Petersburg-Clearwater, FL MSA	3,739	0.29	\$710	2,321	1.15	\$1,023
Terre Haute, IN MSA	470	0.62	\$929	5	6	5
Texarkana, TX-AR MSA	257	0.41 <sup>2</sup>	\$949 <sup>2</sup>	49	.54 <sup>8</sup>	\$542 <sup>8</sup>
Toledo, OH MSA	1,736	0.54	\$850	286	0.64 <sup>2</sup>	954 <sup>2</sup>
Topeka, KS MSA	3,232	2.77	\$944	5	6	5
Trenton, NJ MSA	444	0.18	\$600	5	6	5
Tucson, AZ MSA	568	0.15	\$585	702	1.24	\$688
Tulsa, OK MSA	2,390	0.53	\$817	904	1.35	\$858
Tuscaloosa, AL MSA	773	0.72	\$848	21	0.14	\$454
Tyler, TX MSA	1,065	0.95	\$915	5	6	5
Urban Honolulu, HI MSA	5,079	1.00	\$594	661	0.84	\$1,022
Utica-Rome, NY MSA	1,399	1.05	\$738	5	6	5
Vallejo-Fairfield, CA MSA	2,495	1.71	\$935	579	2.60	\$1,327
Vineland-Bridgeton, NJ MSA	2,934	4.62	\$925	6	0.08	\$587
Virginia Beach-Norfolk-Newport News,	5,562	0.70	\$812	991	0.83	\$1,324

METRO AREA	FOOD MANUFACTURING (NAICS 311)			BEVERAGE MANUFACTURING (NAICS 3121)		
	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>	AVERAGE EMPLOYMENT	EMPLOYMENT CONCENTRATION <sup>1</sup> (Location Quotient)	AVG WEEKLY WAGE <sup>1</sup>
VA-NC MSA						
Visalia-Porterville, CA MSA	6,743	3.90	\$973	149	0.69	\$773
Waco, TX MSA	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>	341	1.96 <sup>2</sup>	916 <sup>2</sup>
Walla Walla, WA MSA	1,444	4.72 <sup>2</sup>	\$656 <sup>2</sup>	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	4,857	0.15	\$677	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Waterloo-Cedar Falls, IA MSA	3,444	3.65	\$787	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Watertown-Fort Drum, NY MSA	272	0.54	\$898	111	2.03	\$378
Wausau, WI MSA	1,750	2.26	\$806	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Weirton-Steubenville, WV-OH MSA	62	0.14	\$323	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Wenatchee, WA MSA	237	0.34	\$650	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Wheeling, WV-OH MSA	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>	19	0.27	\$442
Wichita, KS MSA	2,010	0.62	\$1,091	258	0.61	\$818
Wichita Falls, TX MSA	43	0.07	\$872	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Williamsport, PA MSA	1,040	1.90	\$1,005	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Wilmington, NC MSA	268	0.23	\$495	100	0.55	\$445
Winchester, VA-WV MSA	1,578	2.44	\$1,087	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Winston-Salem, NC MSA	1,604	0.61	\$1,082	301	0.72	\$715
Worcester, MA-CT MSA	2,203	0.55	\$959	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Yakima, WA MSA	2,985	2.23	\$779	272	1.50	\$519
York-Hanover, PA MSA	4,979	2.64	\$909	149	0.69	\$423
Youngstown-Warren-Boardman, OH-PA MSA	1,733	0.76	\$800	<sup>5</sup>	<sup>6</sup>	<sup>5</sup>
Yuma, AZ MSA	596	0.58 <sup>2</sup>	\$662 <sup>2</sup>	82	0.91	\$829

Source: US Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), 3<sup>rd</sup> Qtr 2015- 2<sup>nd</sup> Qtr 2016

Notes:

<sup>1</sup> Data presented is for June 2016

<sup>2</sup> Data for wages and location quotient are from 2015 Annual Average data

<sup>3</sup> Data for wages and location quotient are from 4<sup>th</sup> Quarter 2015 data

<sup>4</sup> Average weekly salary for the Distillery sector in Louisville-Jefferson County, KY-IN MSA was \$2,919 for 2015

<sup>5</sup> Not Disclosed - data do not meet BLS or State agency disclosure standards

<sup>6</sup> One or more components of this calculation do not exist or do not meet BLS or State agency disclosure standards

<sup>7</sup> Data for wages and location quotient are from 1<sup>st</sup> Quarter 2016 data

<sup>8</sup> Data for wages and location quotient are from 3<sup>rd</sup> Quarter 2015 data

Food and Beverage Manufacturing Subsectors:

Animal Food (NAICS 3111)

Grain & Oilseed Milling (NAICS 3112)

Sugar & Confectionary Products (NAICS 3113)

Fruit & Vegetable Preserving/Specialty Foods (NAICS 3114)

Dairy Products (NAICS 3115)

Meats (NAICS 3116)

Seafood (NAICS 3117)

Bakeries (NAICS 3118)

Snack Foods, Sauces, Nuts, Coffee & Tea (NAICS 3119)

Soft Drinks, Bottled Water & Ice (NAICS 31211)

Breweries (NAICS 31212)

Wineries (NAICS 31213)

Distilleries (NAICS 31214)

## METHODOLOGY, NOTES ON DATA & NONDISCLOSURE

Employment data used for this report was primarily an average for the twelve months ending June 2016, the latest available from the Bureau of Labor Statistics. This information is reported by employers and reflects place of work data regardless of where people reside. Wage data and location quotients were used from the latest quarter or June 2016 unless otherwise noted.

There are 68 Metropolitan Statistical Areas not listed on the table above due to lack of data in Food and Beverage Manufacturing NAICS codes of 311 and 3121 within the Quarterly Census of Employment & Wages (QCEW) series over the last 12 months.

In some cases, there is no reported or zero economic activity. However, it is most likely that data is suppressed to protect the identity, or identifiable information, of cooperating employers. Most of the suppressed data are provided by or are substantially attributable to a single large employer or necessary for otherwise disclosable data that may be used to derive sensitive information from another industry or area especially when reporting Metropolitan Statistical Areas which are sets of counties, parishes, and cities.

There may also be cases where the higher level NAICS category may be suppressed, such as NAICS 311 Food Manufacturing, but the lower level NAICS subcategory is disclosed, such as NAICS 3116.

Strategies to review this industry in your area if not disclosed above include reviewing the data at the county level or explore different sources that may utilize models to estimate employment.

**About Garner Economics:** We are data driven strategists helping companies, communities and organizations, large and small, urban and rural, achieve success.

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