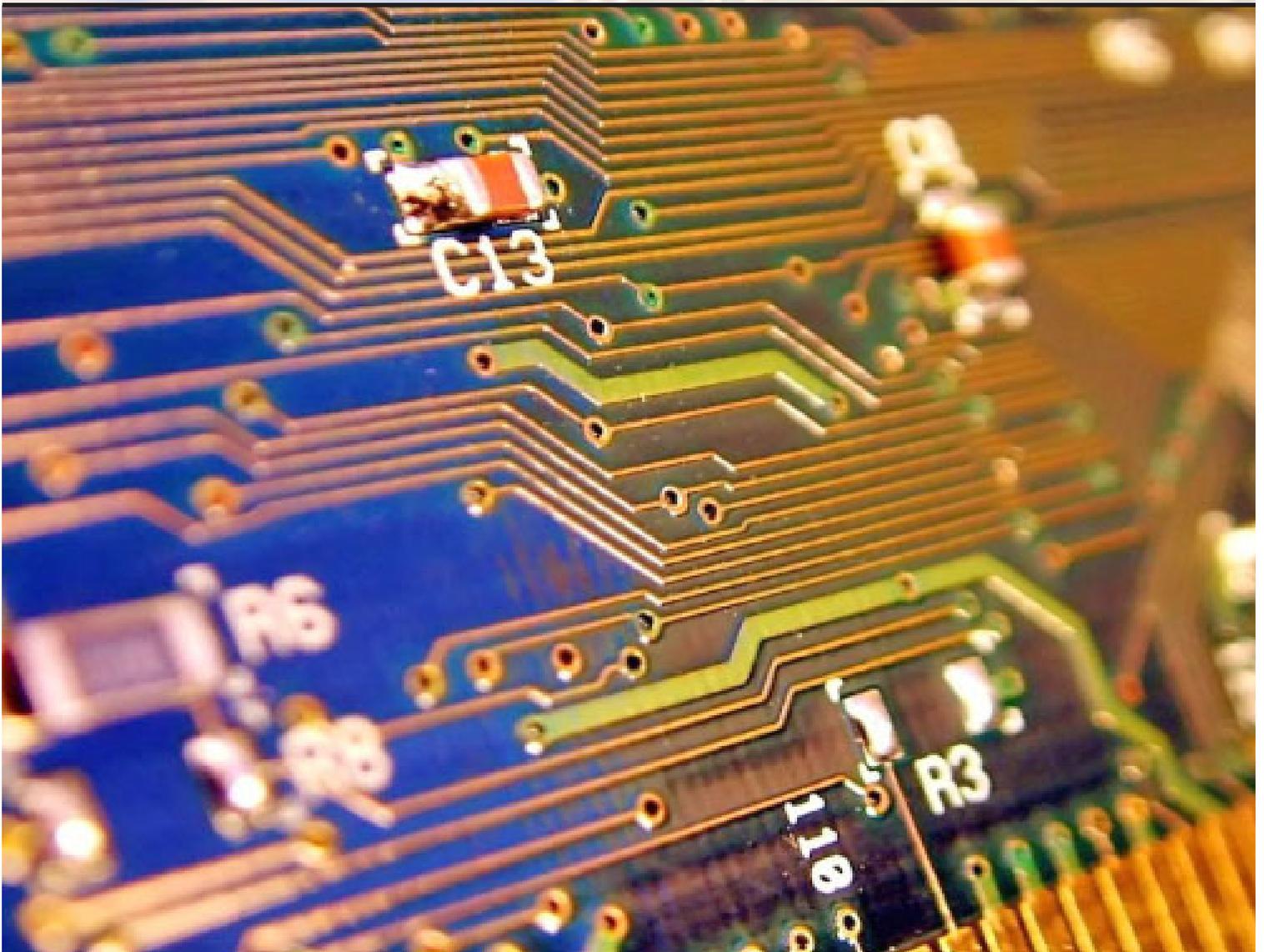


L a b o r M a r k e t I n d u s t r y P r o f i l e

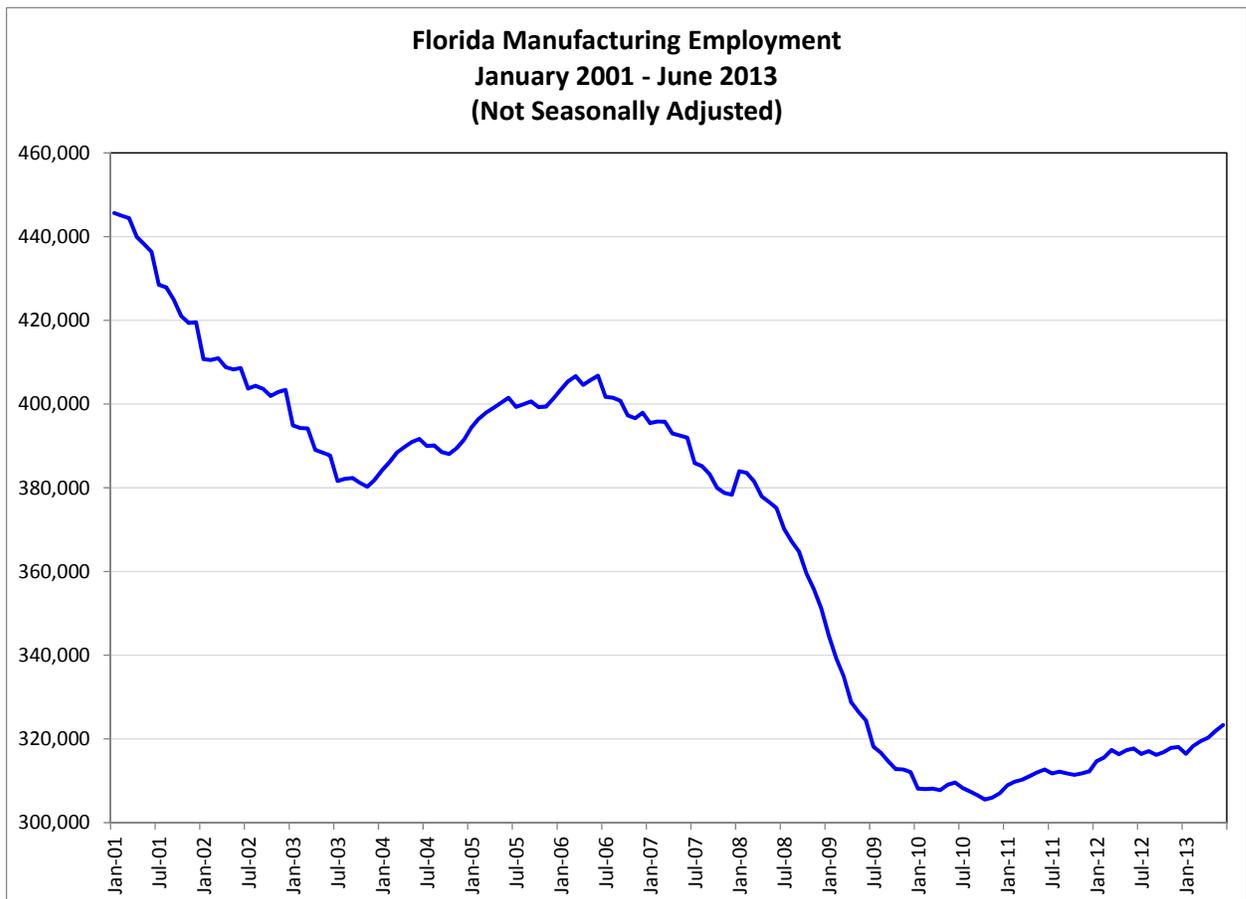
# Florida Manufacturing Industry



## Florida Manufacturing Industry

Florida manufacturers are critical to the state's economy. Many Florida manufacturing operations benefit from the presence of advanced research facilities at Florida's universities and colleges, military installations, and NASA.

- In June 2013, Florida manufacturing was 4.4 percent of the employment for all industries. Manufacturing is separated into durable goods manufacturing and nondurable goods manufacturing. Durable goods manufacturing accounted for 66.7 percent of June 2013 manufacturing employment and nondurable goods manufacturing accounted for 33.3 percent.
- Manufacturing had 18,510 establishments in June 2013, with employment of 323,341 jobs. Employment was up 5,660 jobs (+1.8 percent) over the year.



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

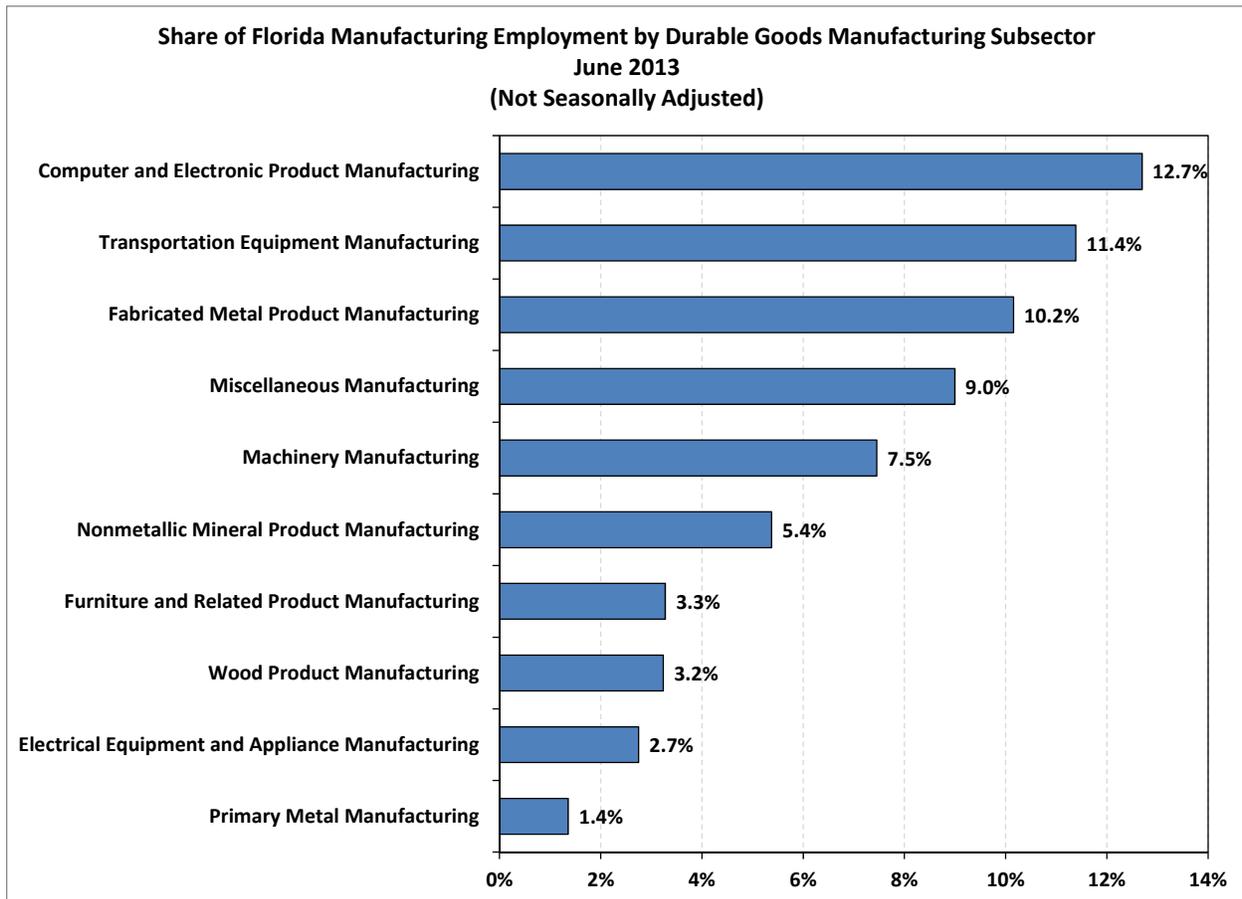
- Manufacturing employment was on a downward trend from January 2001 to November 2010. From November 2010 to June 2013, employment briefly rose before once again following a trend of decline from June 2013 to October 2010. Manufacturing

employment has been growing since the October 2010 low of 305,499 jobs. Manufacturing employment increased by 17,842 jobs from October 2010 to June 2013.

- The largest industry subsectors in manufacturing in June 2013 were computer and electronic product manufacturing (41,048 jobs); transportation equipment manufacturing (36,823 jobs); fabricated metal product manufacturing (32,836 jobs); food manufacturing (29,704 jobs); miscellaneous manufacturing (29,088 jobs); and machinery manufacturing (24,099 jobs). These six subsectors made up 59.9 percent of total manufacturing employment. Food manufacturing is the only subsector of these six that manufactures nondurable goods.

### **Durable Goods Manufacturing**

- Durable goods manufacturing includes the following industry subsectors: wood product manufacturing; nonmetallic mineral product manufacturing; primary metal manufacturing; fabricated metal product manufacturing; machinery manufacturing; computer and electronic product manufacturing; electrical equipment and appliance manufacturing; transportation equipment manufacturing; furniture and related product manufacturing; and miscellaneous manufacturing.
- Durable goods manufacturing had 12,047 establishments in June 2013, with employment of 215,601. Employment was up 5,639 jobs (+2.7 percent) over the year.
- The largest industry subsectors in durable goods manufacturing in June 2013 were computer and electronic product manufacturing (41,048 jobs); transportation equipment manufacturing (36,823 jobs); fabricated metal product manufacturing (32,836 jobs); miscellaneous manufacturing (29,088 jobs); and machinery manufacturing (24,099 jobs). These five subsectors accounted for 76.0 percent of durable goods manufacturing employment and 50.7 percent of total manufacturing employment.



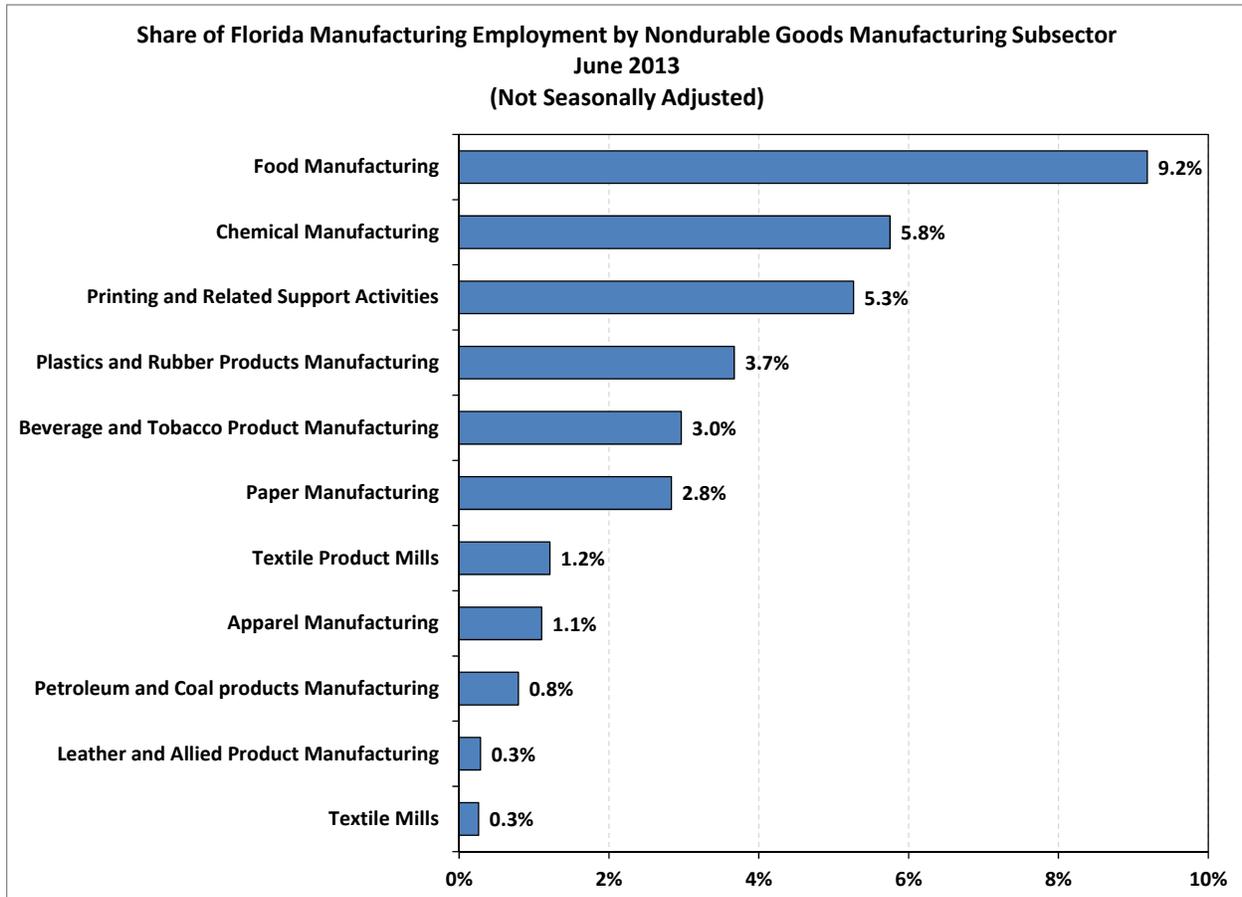
Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Eight of the ten durable goods subsectors gained jobs over the year in June 2013. Fabricated metal product manufacturing (+1,876 jobs, +6.1 percent) gained the most jobs from June 2012 to June 2013, while computer and electronic product manufacturing (-1,727 jobs, -4.0 percent) lost the most jobs.

### **Nondurable Goods Manufacturing**

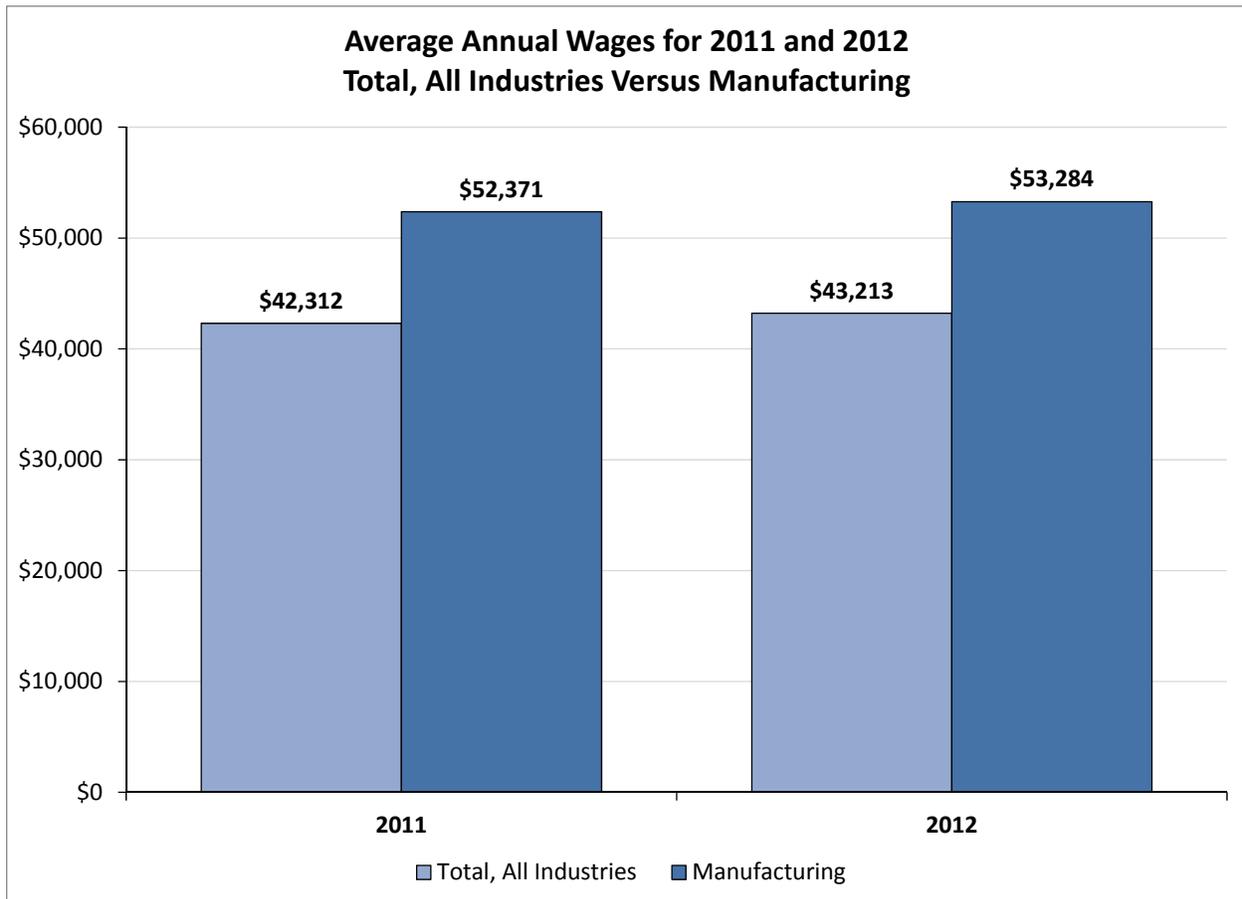
- Nondurable goods manufacturing includes the following subsectors: food manufacturing; beverage and tobacco product manufacturing; textile mills; textile product mills; apparel manufacturing; leather and allied product manufacturing; paper manufacturing; printing and related support activities; petroleum and coal products manufacturing; chemical manufacturing; and plastics and rubber products manufacturing.
- Nondurable goods manufacturing had 6,463 establishments in June 2013, with employment of 107,740 jobs. Employment was virtually unchanged (up 21 jobs; less than 0.1 percent) over the year.

- The largest industry subsectors in nondurable goods manufacturing in June 2013 were food manufacturing (29,704 jobs); chemical manufacturing (18,602 jobs); and printing and related support activities (17,021 jobs). These three subsectors accounted for 60.6 percent of nondurable goods manufacturing employment and 20.2 percent of total manufacturing employment.



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Seven of the 11 nondurable goods manufacturing subsectors gained jobs over the year in June 2013. Food manufacturing (+715 jobs, +2.5 percent) gained the most jobs from June 2012 to June 2013, while textile product mills (-735 jobs, -15.8 percent) lost the most jobs.



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Manufacturing's 2012 average annual wage increased more than the average wage for all industries over the year, but it grew at a slower rate. The 2012 average annual wage for the manufacturing industry was \$53,284, an increase of \$913 (+1.7 percent) from 2011. The average annual wage for all industries grew by \$901 (+2.1 percent) over the year.
- The manufacturing industry's 2012 average annual wage exceeded the average annual wage for all industries by \$10,071 (+23.3 percent). This difference was only slightly changed from 2011 when it was \$10,059 (+23.8 percent).
- The computer and electronic product manufacturing subsector had an average annual wage of \$77,860 in 2012, the highest in manufacturing. Apparel manufacturing had the lowest average annual wage in 2012 (\$32,428). Thirteen of the 21 manufacturing subsectors had a 2012 average annual wage greater than the average for all industries (\$43,213). Eleven manufacturing subsectors had an average annual wage greater than \$50,000 and three subsectors had an average annual wage greater than \$60,000.

## All Education and Training Levels

<b>Top Occupations in the Manufacturing Industry For All Training Levels</b>							
Occupation Title	Employment		Change		% of Industry Total	2013 Average Hourly Wage	Training Requirement
	2013	2021	Total	Percent			
<b>Total, All Manufacturing Occupations</b>	<b>317,811</b>	<b>324,643</b>	<b>6,832</b>	<b>2.15</b>			
Team Assemblers	26,888	27,797	909	3.38	8.46	\$12.89	High school
First-Line Supervisors/Managers of Production and Operating Workers	14,125	14,344	219	1.55	4.44	\$27.02	PSAV Certificate
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	9,435	9,614	179	1.90	2.97	\$28.81	PSAV Certificate
Packaging and Filling Machine Operators and Tenders	8,815	8,906	91	1.03	2.77	\$13.28	Less than high school
Electrical and Electronic Equipment Assemblers	8,751	8,717	-34	-0.39	2.75	\$15.03	PSAV Certificate
Industrial Engineers	7,625	7,877	252	3.30	2.40	\$34.37	Bachelor's degree
Inspectors, Testers, Sorters, Samplers, and Weighers	7,082	7,445	363	5.13	2.23	\$16.97	High school
Machinists	6,553	6,956	403	6.15	2.06	\$18.60	PSAV Certificate
Helpers--Production Workers	6,102	6,170	68	1.11	1.92	\$12.02	Less than high school
Welders, Cutters, Solderers, and Brazers	5,727	6,230	503	8.78	1.80	\$17.99	PSAV Certificate
Truck Drivers, Heavy and Tractor-Trailer	5,381	6,175	794	14.76	1.69	\$17.96	PSAV Certificate
Printing Press Operators	5,267	4,889	-378	-7.18	1.66	\$15.95	High school
Laborers and Freight, Stock, and Material Movers, Hand	4,850	4,956	106	2.19	1.53	\$12.29	Less than high school
Mixing and Blending Machine Setters, Operators, and Tenders	4,737	5,003	266	5.62	1.49	\$14.85	High school
Shipping, Receiving, and Traffic Clerks	4,720	4,342	-378	-8.01	1.49	\$13.68	PSAV Certificate

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, Forecast to 2021. Forecasts to the year 2021 assume continued economic recovery.

- The 15 largest manufacturing-specific occupations represent 39.7 percent of total occupational employment in manufacturing.
- The largest manufacturing-specific occupation in 2013 was team assemblers, which has an average hourly wage of \$12.89.
- Average hourly wages among the 15 largest manufacturing-specific occupations range from a high of \$34.37 for industrial engineers to a low of \$12.02 for helpers-production workers.
- Three out of the 15 largest occupations have an average wage greater than \$20.00 per hour.
- Twelve of the 15 largest occupations are projected to gain jobs through 2021 and three occupations are projected to lose jobs.
- Team assemblers (+909 jobs) are projected to gain the most jobs of all of the top 15 manufacturing-specific occupations from 2013 to 2021. Truck drivers, heavy and tractor-trailer (+14.76 percent) are projected to grow the fastest from 2013 to 2021. Shipping, receiving, and traffic clerks and printing press operators (-378 jobs each) are projected to lose the most jobs from 2013 to 2021.

- Eight of the top 15 manufacturing-specific occupations require training beyond high school, but only one requires a bachelor's degree. Higher wages are found in occupations with greater training requirements.

### Bachelor's Degrees

<b>Top Occupations in the Manufacturing Industry That Require 4-Year Degree or Higher</b>							
Occupation Title	Employment		Change		% of Industry Total	2013	Training Requirement
	2013	2021	Total	Percent		Average Hourly Wage	
<b>Total, All Manufacturing Occupations</b>	<b>317,811</b>	<b>324,643</b>	<b>6,832</b>	<b>2.15</b>			
Industrial Engineers	7,625	7,877	252	3.30	2.40	\$34.37	Bachelor's degree
Accountants and Auditors	3,235	3,259	24	0.74	1.02	\$32.41	Bachelor's degree
Mechanical Engineers	3,171	3,163	-8	-0.25	1.00	\$39.16	Bachelor's degree
Software Developers, Systems Software	2,858	2,976	118	4.13	0.90	\$45.21	Bachelor's degree
Electrical Engineers	2,374	2,328	-46	-1.94	0.75	\$42.31	Bachelor's degree
Aerospace Engineers	1,951	1,872	-79	-4.05	0.61	\$43.03	Bachelor's degree
Engineering Managers	1,785	1,787	2	0.11	0.56	\$57.65	Bachelor's degree
Electronics Engineers, Except Computer	1,442	1,346	-96	-6.66	0.45	\$41.75	Bachelor's degree
Sales Managers	876	883	7	0.80	0.28	\$62.75	Bachelor's degree
Chief Executives	730	681	-49	-6.71	0.23	\$95.77	Bachelor's degree
Financial Managers	666	669	3	0.45	0.21	\$61.23	Bachelor's degree
Market Research Analysts and Marketing Specialists	626	736	110	17.57	0.20	\$28.45	Bachelor's degree
Management Analysts	607	605	-2	-0.33	0.19	\$37.43	Bachelor's degree
Computer and Information Systems Managers	577	572	-5	-0.87	0.18	\$64.20	Bachelor's degree
Chemists	503	514	11	2.19	0.16	\$32.36	Bachelor's degree

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, Forecast to 2021. Forecasts to the year 2021 assume continued economic recovery.

- The 15 largest high skill manufacturing occupations represent 9.1 percent of total occupational employment in manufacturing.
- The largest high skill manufacturing occupation in 2013 was industrial engineers, which has an average hourly wage of \$34.37.
- Average hourly wages among the 15 largest high skill manufacturing occupations range from a high of \$95.77 for chief executives to a low of \$28.45 for market research analysts and marketing specialists.
- All of the 15 largest high skill occupations have an average wage greater than \$20.00 per hour.
- Eight of the 15 largest high skill occupations are projected to gain jobs through 2021 and seven occupations are projected to lose jobs.
- Industrial engineers (+252 jobs) are projected to gain the most jobs of all of the top 15 high skill manufacturing occupations from 2013 to 2021. Market research analysts and

marketing specialists (+17.57 percent) are projected to grow the fastest from 2013 to 2021. Electronics engineers, except computers (-96 jobs) are projected to lose the most jobs from 2013 to 2021 among the top 15 high skill manufacturing occupations.

- All occupations in the top 15 high skill manufacturing occupations require a bachelor's degree.
- Employment in the manufacturing industry is concentrated in the southeast, central, and northeast parts of the state with the largest number of jobs found in Miami-Dade, Pinellas, Orange, Broward, Hillsborough, Duval, Brevard, Polk, and Palm Beach counties.



