

# MASSACHUSETTS EMPLOYMENT PROJECTIONS THROUGH 2014





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## OVERVIEW

**THE MASSACHUSETTS ECONOMY** should expand by 7.8 percent, generating 265,800 new jobs by 2014. An additional 799,200 job openings will result from the need to replace workers who retire, or change careers. In total nearly 1.1 million jobs will need to be filled by 2014.

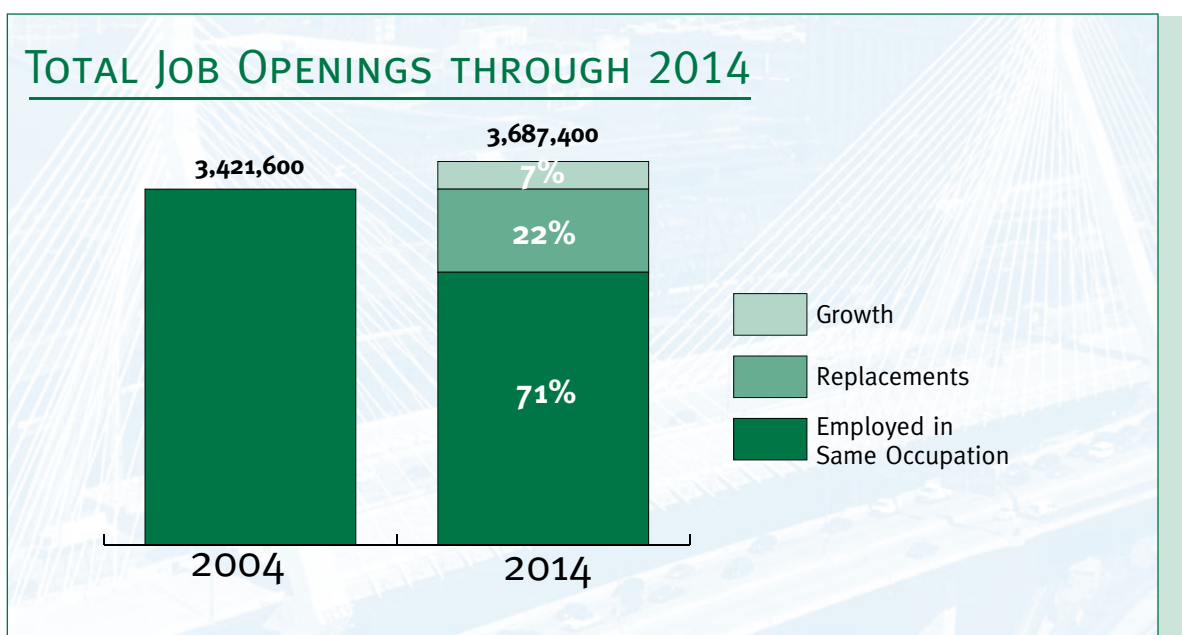


CHART 1

## EMPLOYMENT BY SECTOR, 2004 - 2014

INDUSTRY SECTOR	2004 JOBS	2014 JOBS	NEW JOBS	GROWTH RATE
TOTAL, NONFARM WAGE AND SALARY	3,181,120	3,428,330	247,210	7.8%
NATURAL RESOURCES AND MINING	1,900	1,810	-90	-4.7%
CONSTRUCTION	138,400	134,480	-3,920	-2.8%
MANUFACTURING	312,930	281,210	-31,720	-10.1%
TRADE, TRANSPORTATION, AND UTILITIES	572,110	597,510	25,400	4.4%
INFORMATION	87,440	97,820	10,380	11.9%
FINANCIAL ACTIVITIES	219,730	230,590	10,698	4.9%
PROFESSIONAL AND BUSINESS SERVICES	451,080	538,190	87,110	19.3%
EDUCATIONAL AND HEALTH SERVICES	582,210	676,660	94,450	16.2%
LEISURE AND HOSPITALITY	290,800	325,450	34,650	11.9%
OTHER SERVICES	116,820	128,230	11,410	9.8%
GOVERNMENT	407,700	416,380	8,680	2.1%

**THE RISE OF INFORMATION TECHNOLOGY** throughout the workplace has spurred the demand for more highly educated workers. This development along with the aging of the population will play ever more important roles in shaping job growth through 2014.

Over the next 10 years jobs will continue to exist for workers at all levels of education and training, but education requirements will increase and change the skill content in many occupations.

These projected changes include:

- While job growth will vary widely by industry, occupation, and education, nearly two-thirds of all new nonfarm wage and salary jobs will emerge in 1) health care and social assistance and 2) professional, scientific and business services — industries in which high-tech companies abound. Health care alone will account for nearly 63,570 jobs during the projection period.
- As a result of rapid growth in the health care and professional, scientific and business service industries, demand for professional and technical workers is projected to increase the fastest and generate the most new jobs. Demand for service workers — nursing and home health aides and waiters and waitresses — will generate the 2nd largest number of new jobs through 2014. Together these two occupational groups, which are on opposite ends of the education and earnings spectrum, will account for the majority of the state's new jobs (85 percent) by 2014.

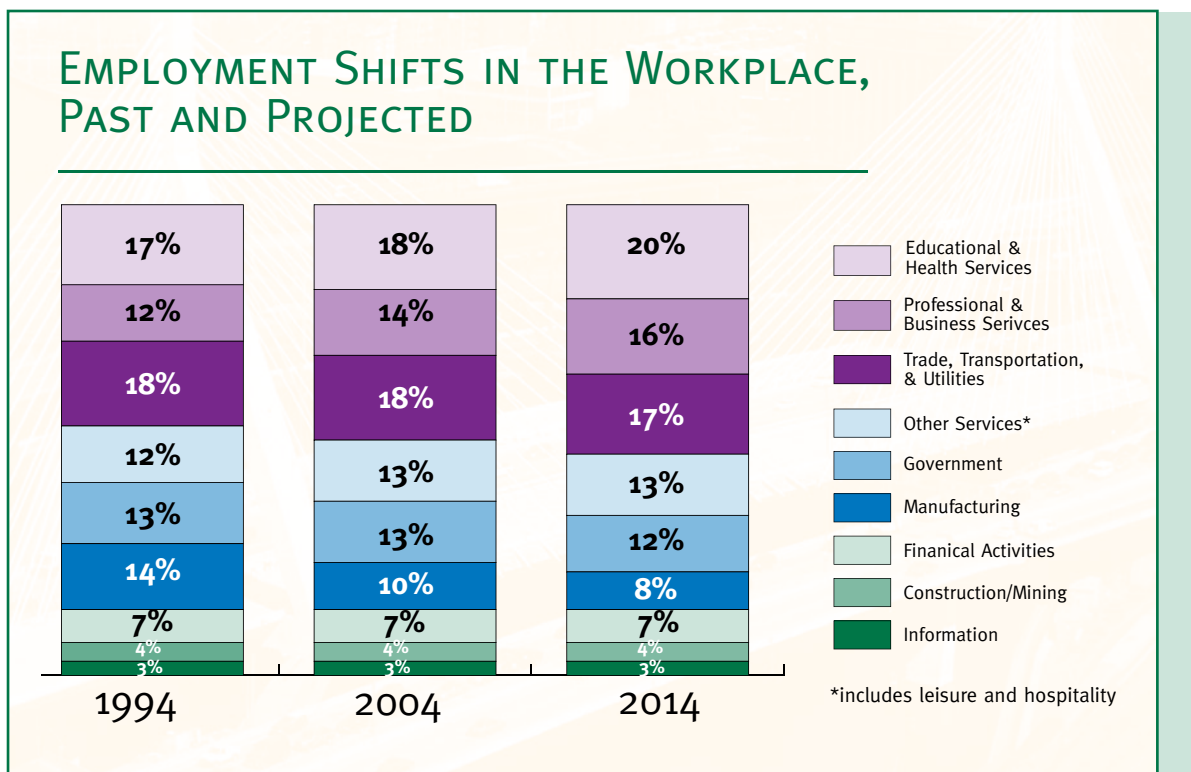


CHART 2



- Of the 30 fastest growing occupations, 19 are concentrated in health care and information technology. The remaining 11 are related to the growth of biotechnology, environmentalism, education, and forensic science. In terms of education and training requirements, 22 of these 30 fastest growing occupations will require an associate's degree or higher.
- Due to retirements and other replacement needs jobs will continue to be available at all levels of education and training. In fact three times as many job openings will result from the need to replace workers (799,000) than from economic growth (266,000).
- Replacement needs tend to be greatest in occupations where a higher than average proportion of workers are near retirement, such as teaching and in occupations where a large concentration of young and part-time workers results in high job turnover, such as waitressing.
- Nevertheless, education and training requirements will rise. Through 2014 approximately 56 percent of all new jobs created from economic growth will require an associate's degree or higher.

**SUMMARY:** The impact of both replacements and new jobs will vary widely. In general, workers with the most skills will have the most job opportunities and the greatest access to high-paying jobs.

## DIFFERENCES IN THE INDUSTRY AND OCCUPATIONAL STRUCTURE OF THE US AND MA ECONOMIES

Because Massachusetts has a higher than average concentration of jobs in education, health care, finance, and professional and technical services a greater proportion of jobs here are found in professional and technical occupations compared to the United States

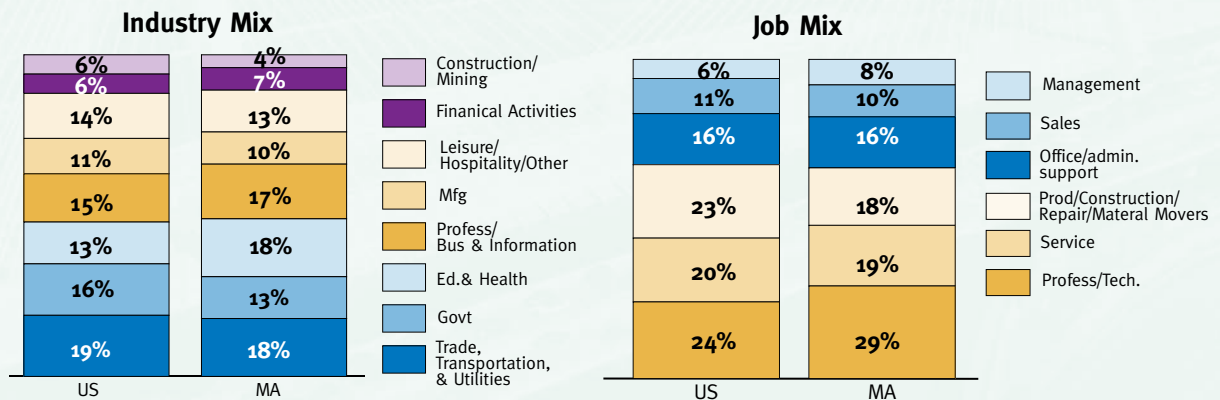


CHART 3

# JOB GROWTH BY MAJOR INDUSTRY SECTOR

## PROFESSIONAL AND TECHNICAL SERVICES

Demand for professional and technical services — including management consulting, computer systems design, research and testing, state-of-the-art engineering, legal and accounting services — should expand 24.3 percent and generate 54,340 new jobs, nearly 22 percent of all new nonfarm wage and salary jobs generated through 2014.

**MANAGEMENT CONSULTING.** Within this high-paying sector, demand for management and technical consulting services will increase 45.8 percent — the fastest of all professional and technical categories - and generate approximately 14,500 new jobs. This is the economy’s second fastest growing industry behind software publishers and the state’s fourth largest source of projected new jobs behind eating and drinking places, hospitals, and colleges and universities.

Economic growth and the continuing complexity of business management will fuel this growth. As competition increases, more firms will need expert advice in all areas of business planning. The increasing globalization of business and industry will also fuel growth as more companies look to expand abroad or cut costs by outsourcing administrative and human resource functions to firms that specialize in them. As a result, all areas of consulting should experience strong growth, including marketing, human resources, environmental, logistics, e-commerce, and health care.

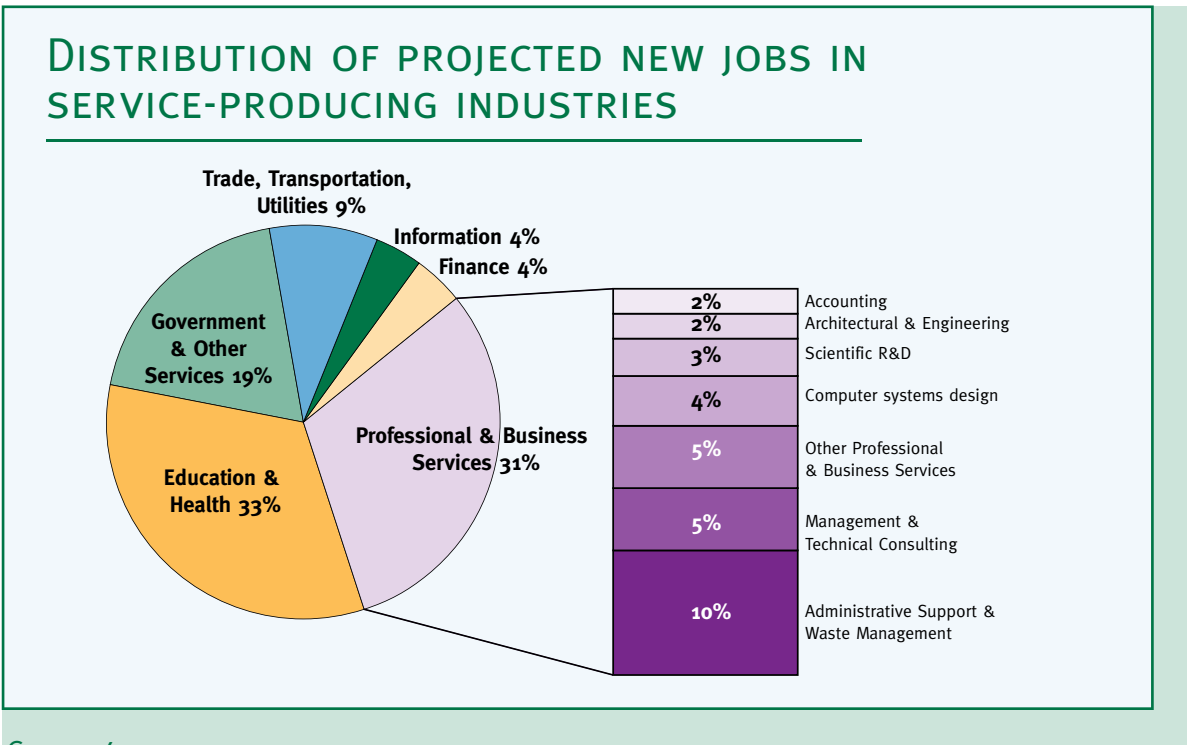


CHART 4

**COMPUTER SYSTEMS DESIGN.** With the complexity of IT increasing as firms become ever more reliant on technology to store, protect, and report data, demand for computer systems design services, including systems integration, network security, technical support, and web development, should increase 25.4 percent and generate 10,920 new jobs. Although this projected growth rate is slower than the 1990s when demand for computer system design and related services exploded and employment doubled generating 30,800 new jobs, it still places the computer systems design industry among the state's top 10 fastest growing industries and makes computer systems design the state's eighth largest source of new jobs.

Nevertheless, competition among management and scientific consulting firms and computer systems design firms will remain keen, and mergers and consolidations could result as large companies expand their areas of expertise. Consulting companies will also face competition from major hardware and software companies that now offer turnkey system design and installation services.



**RESEARCH AND TESTING.** Employment in this industry should increase 26.7 percent and generate another 9,790 high-paying jobs within the professional and technical sector. With an aging of the population, the demand for new lifesaving drugs and procedures to cure AIDS, cancer and other diseases will drive job growth as will advances in biotechnology and nanotechnology. Competition among pharmaceutical companies and states for leading-edge research dollars will increase and keep jobs from expanding faster than they did in the 1990s when government spending on research and development soared and job growth averaged a whopping 4.2 percent a year. Nevertheless, this projected growth still places research and testing among the top 10 fastest growing industries in the state.

**OTHER PROFESSIONAL B-TO-B SERVICES.** Demand for other professional and business services should remain strong and generate large numbers of new jobs in the following areas:

- architectural and engineering services up by 14 percent, or 5,320 jobs
- accounting and bookkeeping up by 23.5 percent, or 4,530 jobs
- legal services up by 11.6 percent, or 3,600 jobs
- advertising up by 23 percent, or 2,600 jobs
- other professional and technical services - which includes veterinary services, weather forecasting, consumer credit counseling, and marketing research – up by 27.7 percent, or 2,730 jobs.

## HEALTH CARE

Demand for health care should expand 17.1 percent and generate 63,570 new jobs - more than 25 percent of all new nonfarm wage and salary jobs in Massachusetts - by 2014. Efforts to expand health care coverage and improve health care access will drive this growth as well as an aging population that requires more medical care. Projected rates of job growth vary widely within health care and range from a high of 38.8 percent in residential care facilities and 35.4 percent in home health to a low of 8.8 percent in nursing care facilities and 14.2 percent in hospitals, the biggest health care provider.

**HOSPITALS.** The need to control health care costs and reduce inefficiencies will continue to dampen job growth in hospitals. Nevertheless, hospitals by their sheer size should generate more new jobs than any other sector in the industry: 22,320 jobs through 2014, or 35 percent of all new jobs in the health care industry.

**NURSING AND RESIDENTIAL CARE.** With the number of people aged 65 and older projected to rise sharply, demand for long-term nursing and residential care (i.e., skilled nursing care, alternative residential care, or home and community-based care) should generate another 18,000 new jobs in health care. Demand for residential care (i.e. assisted living), alone is projected to increase 38.8 percent by 2004. This is the economy's third fastest growing industry. It also is the economy's fifth largest growing industry with a projected increase of 12,950 new jobs.

**DOCTOR'S OFFICES.** With ever more powerful medical diagnostics and medical therapies being performed in doctor's offices, employment in doctor's and other health care practitioners' offices should increase 16.3 percent and generate the third largest number of jobs in health care (12,680).

**HOME HEALTH.** The fourth largest number of projected new jobs (6,800) will be in home health services. This projected 35.4 percent increase makes home health services the state's fourth fastest growing industry. An aging population, in many cases suffering from functional disabilities, will drive much of the projected demand for in-home support services - including nursing care and physical therapy - as will the desire to maintain an independent home-based lifestyle. In this small health care sector, most new jobs will arise for home health aides and nurses.

It is unknown to what extent the passage of landmark legislation extending the availability of health care coverage to the state's 500,000 uninsured individuals will significantly change the utilization of hospitals and other medical care sites.



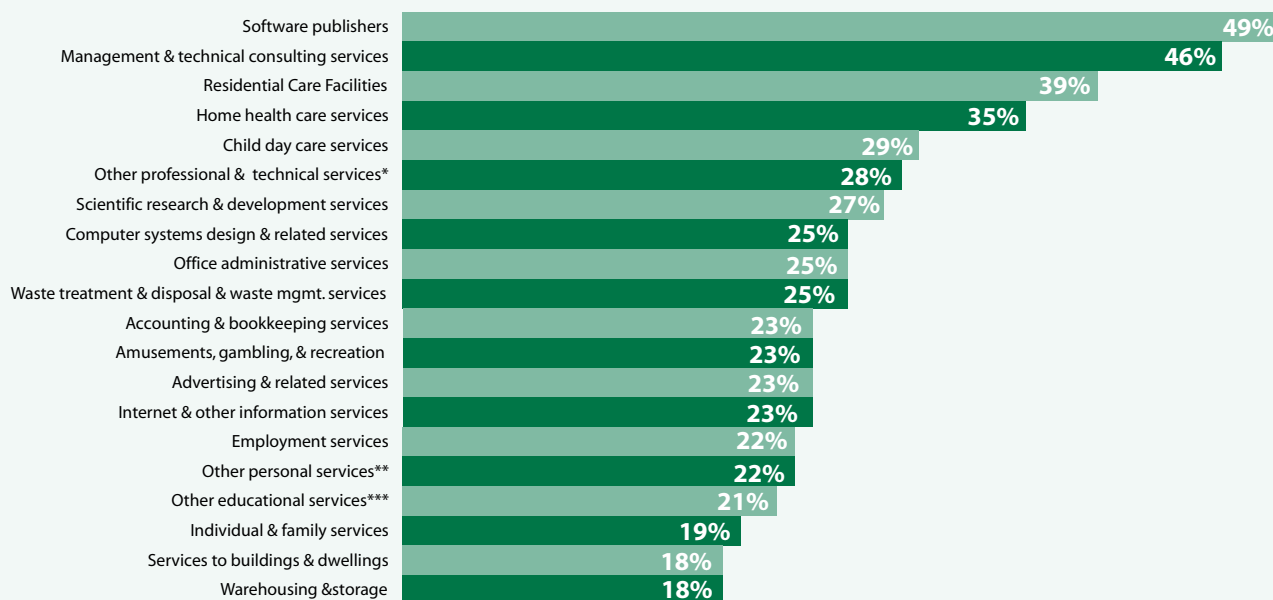


## SOCIAL ASSISTANCE

As services for the elderly and families in crisis are expanded and more state and local social services are contracted out to the private sector, employment in this diverse industry should expand 20 percent and generate about 12,200 new jobs. Individual and family counseling — the largest sector within this industry — should mirror the overall projected demand for social assistance and account for 40 percent of the projected new jobs. With birth rates projected to increase at a faster rate and women's labor force participation rates projected to return to their pre-recession levels, employment in child day care — the second largest sector within this industry — should increase more rapidly (29 percent) and generate 6,370 new jobs, or 52 percent of all jobs. Although this growth represents a major slowdown from the past 10 years when employment increased 51 percent and generated 7,400 jobs, it still places child day care among the top 5 fastest-growing industries in the state.

Increased demand for job training, food, housing and other emergency relief services should fuel the remainder of jobs in social assistance. In sum, employment should total 72,800 by 2014.

### FASTEST GROWING INDUSTRIES, 2004-2014



\*veterinarians & market research & public opinion polling

\*\*wedding planning, escort services, photo labs, parking lots

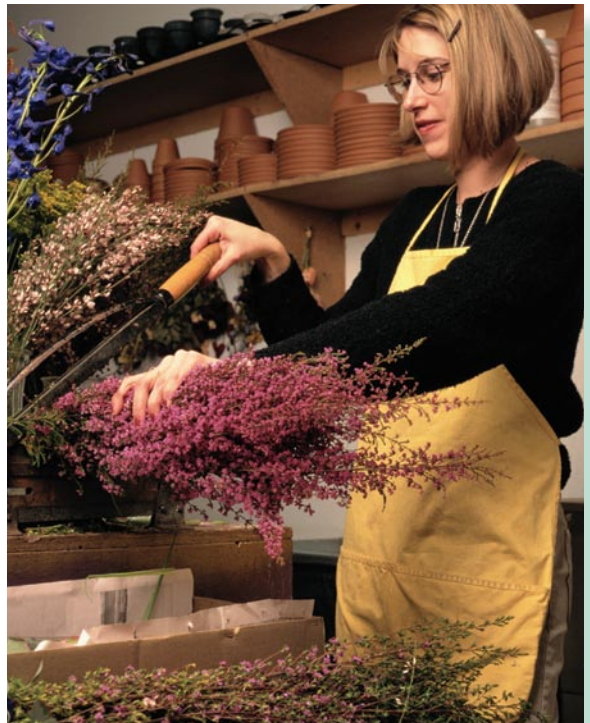
\*\*\*exam preparation & tutoring & educational consultants

CHART 5

## WHOLESALE AND RETAIL TRADE

The Internet, e-commerce, and other technical developments will limit job growth in wholesaling and retailing to 4.6 percent by 2014. Nevertheless, 22,700 new jobs should result, the bulk of which (3 out of 5) should arise in retail trade.

**RETAILING.** Fueled by a tight job market, steady incomes, low long-term interest rates, low inflation, and sharply increasing wealth from rising housing prices and other assets, US consumer spending rose rapidly and by 2004 accounted for 70 percent of GDP, up from the long-run average of 66 percent. In Massachusetts retail sales rose rapidly and employment increased 10.4 percent, generating 33,600 new jobs — the bulk of which were found in many home-related categories, including furniture, appliance and electronic stores, building materials dealers and garden supply centers. In total, these three retail industries employed 15 percent of all retail workers yet accounted for 37 percent of all retail jobs generated between 1994 and 2004.



Over the long-term, with interest rates rising and population and labor force growth slowing, consumer spending should moderate and by 2014 account for a smaller share (68.9 percent) of US GDP. Increases in productivity and competition among retailers should remain intense and limit job growth in Massachusetts to 3.9 percent. Nevertheless, even with a slower rate of growth, about 13,800 new jobs should result. Employment in health and personal care stores should expand the fastest of the retail sectors. In most other retail sectors, employment should remain fairly flat or decline marginally as new more powerful inventory systems emerge and the industries rely more on temporary help.

**WHOLESALE.** In line with the overall growth of the state's economy, employment in wholesaling should expand 6.6 percent by 2014 and generate almost 9,000 new jobs. The globalization of trade and the expansion of business-to-business e-commerce should fuel these jobs as will growth in US exports. Nevertheless, as retailers become bigger organizations and expand their market shares, wholesalers will likely follow suit to expand their scope and reach. Mergers and acquisitions will result and will keep jobs from expanding faster.

## FINANCE, INSURANCE AND REAL ESTATE

Automation, deregulation, and mergers and acquisitions will limit employment increases in finance, insurance, and real estate to 4.9 percent during the projection period. Nevertheless, even with this low rate of growth, approximately 10,700 new jobs should result, the bulk (nearly 60 percent) of which will be in investments and securities.

**BANKING.** Employment will continue to decline in banking but at a much slower pace than in the 1990s when jobs fell 5.6 percent. Most of the decline will be due to the automation of clerical tasks and the growing popularity of on-line banking.

Mergers, which fueled the layoffs of the 1990s, will occur much less frequently as federal regulators become increasingly concerned about possible antitrust violations. But insurance companies, stock brokers and retailers will pose a formidable competitive threat to banks, and this along with automation will cause employment in banking to decline by 3.9 percent, or 1,940 jobs, by 2014.

**SECURITIES AND COMMODITIES.** In contrast to the projected decline in banking, employment in securities and commodities should expand 14 percent and generate 6,360 new jobs. Economic growth and globalization of the securities markets will fuel this growth as will concern about saving and investing money for retirement. However, online trading and other advancements in technology will keep employment from increasing as fast as it did between 1994 and 2004 when the industry added 12,100 jobs, a 26.5 percent increase.

Employment in securities and commodities is highly cyclical. It rises during a business cycle upturn — typically peaking before the actual peak of the cycle — and then falls sharply during the downturn. In the most recent recession, employment peaked in December 2000 — just 3 months before the stock market collapse — with 55,800 workers. By the trough in November 2004, industry employment fell 18.9 percent, shedding 10,500 jobs. Since employment bottomed out, the industry has recovered a relatively small proportion of the jobs that were lost. Nevertheless Massachusetts is still projected to retain approximately 5.9 percent of US employment in securities by 2014, the same share as in 2004.



**INSURANCE.** Heightened competition in insurance, an industry where competition has always been fierce, will keep overall employment levels relatively flat through 2014. Nevertheless, job growth will vary widely by sector. In the insurance carrier sector, which accounts for 65 percent of the jobs in insurance in Massachusetts, employment should decline by 2.5 percent as life and property and casualty insurance carriers downsize or automate operations to cut costs and remain competitive. Although jobs in health and medical insurance should increase, this growth will not offset the job losses in these other two lines of insurance.

In the smaller, local, independently-based insurance agency and brokerage service industry, employment should increase by 7.4 percent, or 1,680 jobs — much in line with overall population and economic growth. Moreover, as insurance investments become more complex and the variety of insurance products expands — especially for natural disasters and long-term medical conditions — more insurance brokers will be needed to help people select the type of coverage that is right for them.

## INDUSTRIES GENERATING THE MOST NEW JOBS, 2004-2014

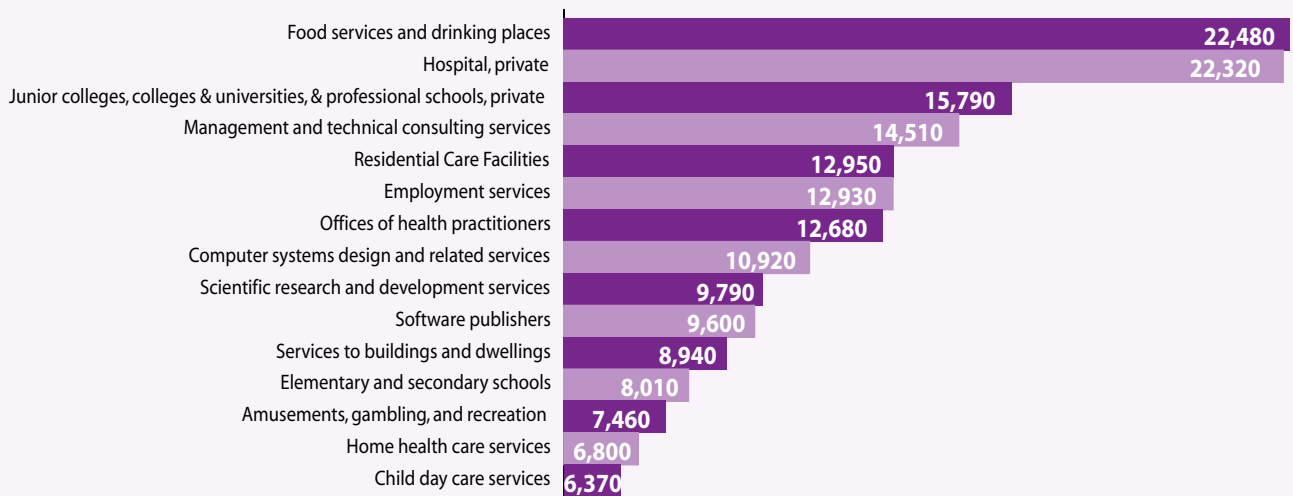


CHART 6



## TRANSPORTATION AND WAREHOUSING

Productivity increases in transportation and warehousing will hold job gains to 4.9 percent through 2014. Nevertheless, employment growth in passenger and ground transport, the largest transportation sector, should increase more rapidly (8 percent) in line with overall economic growth and should generate 1,350 new jobs.

In trucking, the second largest transportation sector (employing over 16,000 workers), long-term job growth will stand at 4.7 percent due to productivity increases from GPS software and from complex systems that track inventory levels and shipments. Increases in e-commerce and world trade will spur demand for trucking, but productivity growth will keep jobs from rising faster.

In air transportation— the fourth largest transportation sector after couriers and the one most affected by the latest recession— employment is projected to continue to decline and to level off at 8,000 jobs as air carriers' profit margins remain squeezed and technological and operational innovations improve efficiencies.

It is unclear at this time whether employment in air transportation which has shed 3,400 jobs since 2001, will bounce back when the economy improves and travel picks up. The industry rebounded after previous recessions, but it is likely that productivity gains, combined with a wide range of cost-cutting measures, will continue to depress employment growth over the long-term as more business is conducted through powerful telecommunications media, including the Internet, video conferences, and mobile communications.

## EDUCATIONAL SERVICES

With more emphasis on improving workplace skills and raising the level of education in general, employment in private education should expand 12.4 percent and generate 18,690 jobs, the bulk of which (78 percent) will be in post-secondary education.

With the number of 18 to 24-year-olds increasing and swelling college enrollments, employment in private 2 and 4-year colleges and universities should increase by 11.2 percent, or 11,900 jobs. Demand for computer and other post-secondary technical training should increase even faster (21 percent) and generate another 2,650 new jobs in post-secondary education. In this age of rapid technological and economic changes, lifelong learning has become increasingly more important in acquiring new knowledge and upgrading one's technical skills. To keep pace with these advances, companies are increasingly requiring technical certification.

Moreover, as higher educational standards are developed and standardized testing expands, demand for educational consultants, tutors, and curriculum development specialists, and other testing and evaluation professionals should increase 22.2 percent and generate another 500 jobs.

In private elementary and secondary education, employment should expand somewhat more gradually over the next 10 years as increases in enrollment slow down. Nevertheless, even with this slower rate of growth, employment should still expand 12.2 percent and generate 3,640 new jobs.

## INFORMATION

In the highly competitive and rapidly changing information sector — a diverse sector comprising traditional and emerging media/communication firms such as software and newspaper publishing and wired and wireless telecommunications — overall employment should expand 11.9 percent and generate 10,380 new jobs. The vast majority (92 percent) of these jobs will be in software publishing.

**TELECOMMUNICATIONS.** Consolidation and competition will continue unabated and lead to a 13 percent decrease in telecommunications jobs. Rapid advances in telecom technology will also continue unabated, and as the distinctions between cable TV and wireless and wireline telephone systems become less obvious and increase competition, the industry should shed 2,830 jobs.

**SOFTWARE PUBLISHING.** In this industry, which includes firms that create software as opposed to those that modify software, employment is projected to increase 50 percent, making this the state's fastest growing industry. Global competition and increased business demand for faster and more powerful software with easy-to-use interfaces will continue to fuel investments in software, particularly in the areas of network security. Consumer demand for educational software and video games will also spur growth as will the continued growth of general Internet use and the need to absorb a limitless quantity of material on the web.

Job growth will nevertheless continue to be tempered by competition, mergers, and offshoring as companies contract out more of the routine tasks to foreign companies that have lower labor costs. Low-level jobs, in particular, will continue to move offshore.

Furthermore, as information technology expands into more and more sectors of the economy, employers will look for IT workers who possess business expertise in other fields, including finance and project management. Software engineers who keep their IT skills up-to-date and have a background in project management will have the best job opportunities.

**INTERNET AND OTHER INFORMATION SERVICES.** Consolidation of Internet service providers will temper employment growth in this industry sector, as will the growth of cable and telephone service providers offering Internet access through their networks. Nevertheless, employment should increase 22.6 percent, and generate over 3,000 new jobs.



## ADMINISTRATIVE SUPPORT AND WASTE MANAGEMENT

Employment in this sector should expand 17.7 percent and generate 28,570 new jobs. Business demand for employment services, most notably temporary help services, is projected to generate the most new jobs in this industry (12,900) and account for 45 percent of all new jobs. As global competition increases and market forces change abruptly, businesses will increasingly contract out for temporary help rather than add to their labor costs by hiring workers on a permanent basis. This arrangement will help companies weather economic ups and downs. In addition, more and more companies will adopt flexible work schedules to make their staffing patterns more responsive to market changes.

Professional employer organizations are expected to grow as companies attempt to control costs, reduce risks, and integrate services by hiring contractors to administer health benefits, workers' compensation, unemployment insurance, tax payments and payroll services. Other administrative support industries that will grow rapidly include maintenance and security. In these two industries combined, employment is projected to increase 17 percent and generate 10,800 new jobs.

## GOVERNMENT

Overall employment in government should expand by 2.1 percent, or 8,680 jobs by 2014. At the federal level, job losses will continue but at a much slower rate than during the prior 10 years when employment fell 15 percent. At the state and local level, jobs will continue to increase as the demand for community, health, education, and protective services expand — but at much slower rates than before. At all levels of government, controlling costs will remain a concern.

Employment in federal government should decline by 5.8 percent, or 2,930 jobs as more administrative operations are automated or centralized in Washington D.C., or contracted out to the private sector. Employment in state and local government, on the other hand, is projected to increase 3.3 percent with the bulk of the job openings in education. This is down from the 8.0 percent growth rate posted between 1994 and 2004.

## CONSTRUCTION

Long-term economic and demographic factors will dampen job growth in construction from the extraordinary pace seen during the 1990s and cause employment to fall 2.8 percent by 2014. Nevertheless, thousands of jobs will arise to replace construction workers who retire or change careers.

Fueled by low mortgage rates and the Big Dig construction project, construction boomed between 1994 and 2004, generating 52,500 new jobs. In residential construction alone employment shot up 110 percent and continued to increase even after the state entered a recession that caused total employment to decline and the labor force to shrink. This surge, which accounted for 18.9 percent of all jobs generated in the state over the 10 year period compared to 11 percent of US job growth, took place despite below-average population growth (5.2 percent for Massachusetts vs. 12.8 percent for the U.S.).



By 2014, as household formations slow and reduce the demand for single family housing, this growth should moderate, and cause overall employment in construction to fall from 138,400 to 134,500, a loss of 3,900 jobs. Nevertheless, baby boomers who are reaching their 50s and 60s with record wealth, will boost demand for senior housing and second homes. Also, as household incomes rise overall, the demand for home improvements should remain strong and sustain growth in renovations and remodeling.

Demand for nonresidential construction, especially for state-of-the-art nursing and health facilities, will increase and grow faster than it did during the 1990s. In addition, the continued expansion in biotech will fuel growth as will demand for school and office renovations.

Taking all these factors into account, construction will account for 3.9 percent of the state's nonfarm wage and salary jobs in 2014, less than the 4.4 percent share it now encompasses.

Construction is a volatile industry, sensitive to interest rates and the business cycle; employment fluctuates widely during booms and busts. In addition large scale public works projects such as the Big Dig can exert a powerful short-term influence and boost employment well above the trend line. Therefore specific point-in-time projections must be viewed cautiously.



## MANUFACTURING

Over the projection period the steep decline in manufacturing jobs will moderate. Nevertheless, as the globalization of trade heightens competition and automation, manufacturing will still continue to lose employment share. By 2014 manufacturing — which accounted for 14.4 percent of the state's nonfarm wage and salary jobs in 1994 and 9.8 percent in 2004 — will account for 8.2 percent of the state's employment, or 281,200 jobs. This represents a 10 percent decline or a loss of 31,700 manufacturing jobs.

Between 1994 and 2004, Massachusetts lost 105,600 manufacturing jobs or 25 percent of its base. Most of these job losses occurred during the most recent downturn. Although the job losses were widespread occurring in 20 of 21 sectors that make up the state's manufacturing base, more than 3 out of 4 job losses occurred in high-paying durable goods industries — the sectors most affected by the boom and bust in IT investment spending.

Over the projection period, as IT investment spending increases, and the US exchange rate improves and stimulates faster growth in US exports, particularly for IT equipment and high-tech defense electronics, the downward spiral in durable goods manufacturing should moderate from the prior 10 years when employment fell 24 percent, shedding 64,700 jobs and hold the job losses to 19,050, a 9.3 percent decrease.

With real defense expenditures increasing, employment in defense electronics and aerospace is projected to rise slightly as will jobs in medical equipment and supplies. In computer and electronic equipment manufacturing — the state's largest manufacturing industry — employment will decline 8 percent or by 5,900 jobs as production processes improve, and jobs are outsourced to lower wage countries. Nevertheless, the growth of digital technology, artificial intelligence, and nanotechnology will also create new opportunities in this leading edge manufacturing industry which has a strong history of technological innovation. This trend should benefit Massachusetts manufacturers who are often at the forefront of research and development.

With foreign competition remaining fierce in many nondurable goods industries, and output projected to decline in apparel, textiles, and leather manufacturing, nondurable goods manufacturing should decline by 11.7 percent or 12,700 jobs. In apparel, textiles, and leather manufacturing combined, employment is projected to decline by 40 percent and will account for 56 percent of the job losses in nondurable goods manufacturing.

In summary, the projected declines in manufacturing employment does not mean that manufacturing is disappearing from the state's economy. Though challenged by rapidly shifting markets and foreign competition, manufacturing output is projected to grow in many capital intensive high-tech sectors while absorbing declines in labor-intensive lower-margin industries.

## IMPACT ON WORKERS

How will these industry projections affect job opportunities? By analyzing the occupational mix of industries, it is possible to estimate the likely impact. For example, due to the concentration of job growth in IT and health care - which currently employ 35 percent of all professional and technical workers - jobs for professional and technical workers should increase faster than those projected for most other workers. Nevertheless, large numbers of jobs will also result from the need to replace workers who retire, move up the career ladder, or change careers. In fact for every new job created by economic growth, there will be three jobs resulting from replacement needs. The impact of both replacements and new jobs on the demand for workers varies widely. In general, workers with the most skills will have the most job opportunities and the greatest access to high-paying jobs.

### PROFESSIONAL AND TECHNICAL JOBS

Professional and technical workers are projected to have the most job openings overall — 328,600. They will have the largest number of new jobs (143,800 or 54 percent of all projected new jobs) and the second largest number of replacements (184,800) behind service workers. Propelled by these gains, professional and technical workers should account for nearly 31 percent of the Massachusetts' workforce by 2014.

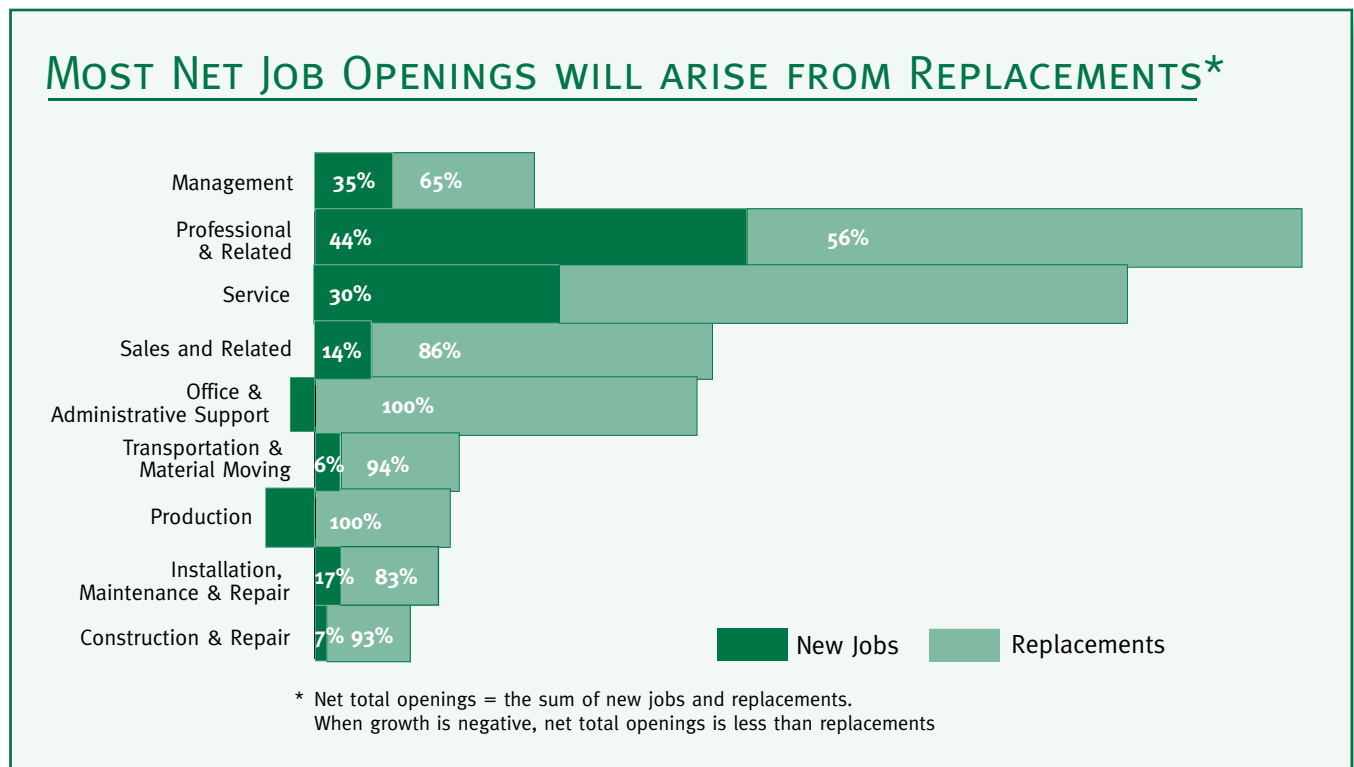


CHART 7

Among the nine professional and technical disciplines, job growth will vary widely, ranging from a high of 25.9 percent for computer and mathematical workers to a low of 9.5 percent for architects and engineers as shown in the following table:

## PROFESSIONAL & TECHNICAL JOB GROWTH, 2004-2014

	2004 JOBS		NEW JOBS		GROWTH RATE
	NUMBER	% SHARE	NUMBER	% SHARE	
TOTAL, PROFESSIONAL & TECHNICAL JOBS	986,840	100.0%	143,820	100.0%	14.6%
HEALTHCARE PRACTITIONERS & TECHNICAL	197,310	20.0%	34,610	24.1%	17.5%
COMPUTER & MATHEMATICAL	116,000	11.8%	30,010	20.9%	25.9%
EDUCATION, TRAINING, & LIBRARY	218,030	22.1%	23,680	16.5%	10.9%
BUSINESS AND FINANCIAL OPERATIONS	170,500	17.3%	20,620	14.3%	12.1%
COMMUNITY & SOCIAL SERVICES	64,950	6.6%	8,660	6.0%	13.3%
LIFE, PHYSICAL, & SOCIAL SCIENCE	47,470	4.8%	7,420	5.2%	15.6%
ARCHITECTURE & ENGINEERING	77,330	7.8%	7,380	5.1%	9.5%
ARTS, DESIGN, ENTERTAINMENT, SPORTS, & MEDIA	64,250	6.5%	7,270	5.1%	11.3%
LEGAL	31,000	3.1%	4,170	2.9%	13.5%

As a result of these differences, the relatively smaller computer and mathematical occupational group will gain the second largest number of new jobs (30,000) and closely trail health practitioners and technologists, who will gain the largest number (34,600) of professional and technical jobs. In total, these two disciplines should account for 45 percent of all new jobs generated in professional and technical occupations by 2014.

## SERVICE JOBS

Service workers— nursing and home health aides, waiters and waitresses, cooks, security guards, janitors and cleaners, cosmetologists, gardeners and grounds keepers — will gain the second largest number of job openings overall (271,300). Because much of the work they perform cannot be automated, their jobs will expand by 12.7 percent, or 82,100. An additional 189,200 job openings will arise from replacement needs. Because service workers tend to change jobs more frequently than those in other occupations, they will have the largest number of replacement openings.

Within this group, food and health service workers will gain 56 percent of all projected new jobs. Health service workers alone should account for 22.5 percent of the new service jobs, as demand for home health aides, medical and dental assistants, and occupational and physical therapy assistants increases by about 32 percent.

## SALES JOBS

Slower growth in wholesale and retail trade, which accounts for approximately 64 percent of all sales workers, will hold job growth in sales to 5.4 percent during the projection period. Automation and increased use of the Internet to purchase and sell goods should restructure sales workers in these key industries. Nevertheless, due to replacement needs, sales workers should gain the third largest number of jobs overall (132,400 or 12 percent of all jobs, a share slightly greater than they now command). Job opportunities should expand the fastest in IT and other professional, scientific, and technical businesses that typically require a 4-year degree.

### FASTEST GROWING OCCUPATIONS, 2004-2014

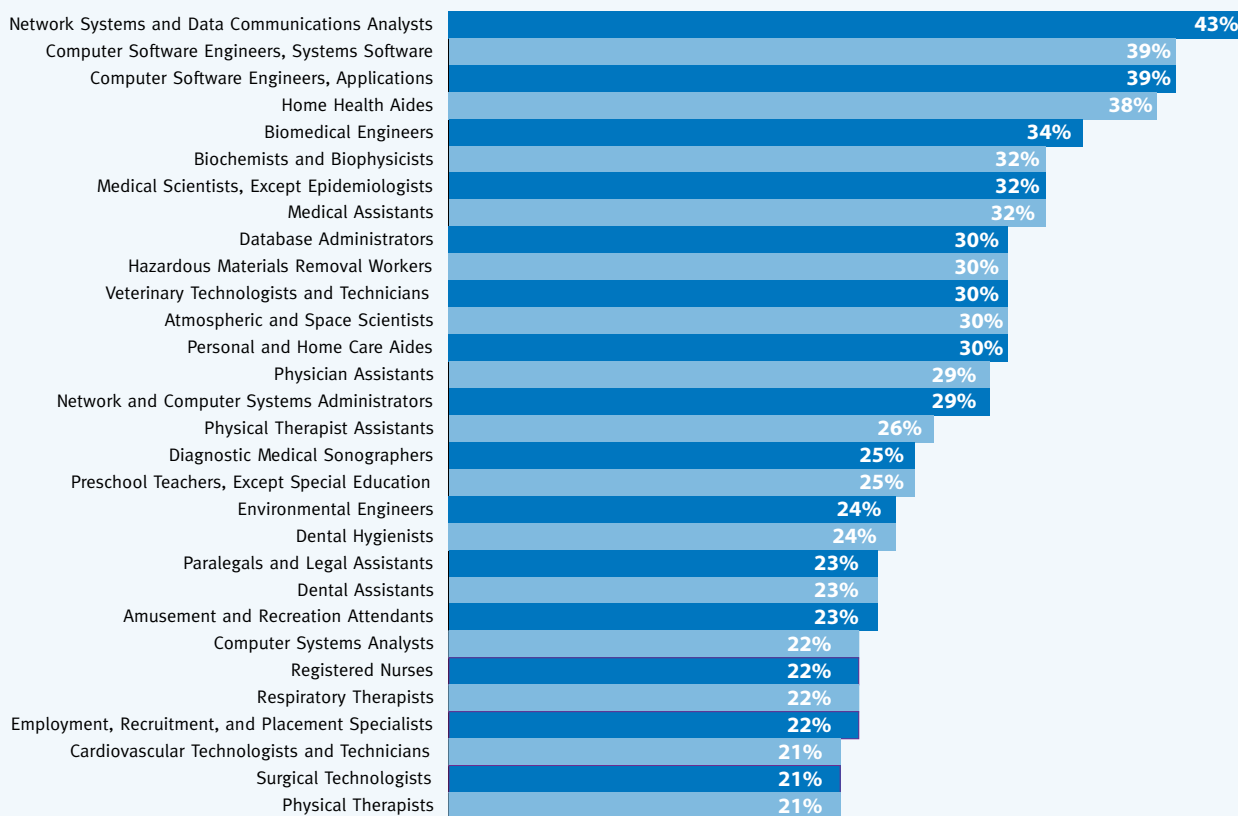


CHART 8



## OFFICE AND ADMINISTRATIVE SUPPORT JOBS

Office and administrative support workers should gain the fourth largest number of jobs overall (120,700 or 11 percent of all jobs). Office automation will continue to cause a decline in jobs in many clerical occupations and will substantially reduce the need to replace office workers who retire or move on to better paying positions. As a result, overall employment of clerical and administrative support workers is projected to fall 1.2 percent by 2014.

Nevertheless, demand for customer service clerks, receptionists, bill and account collectors, and legal secretaries - whose jobs involve a great deal of contact with people and are therefore less affected by office automation - should expand by about 12 percent, or 11,000 jobs. Those who keep their computer skills up to date should have the most opportunities.

## PRODUCTION, CONSTRUCTION, INSTALLATION AND REPAIR JOBS

Globalization, automation, and more efficient construction, repair, and installation techniques will continue to limit or decrease job growth in these fields. Employment of production workers, the largest group of job holders in this category, should decline 7.3 percent, or 13,900 jobs while employment of installers and repairers and construction workers - whose jobs are less subject to globalization - should increase 2.7 percent. Nevertheless, 90,600 jobs will open up in these fields as workers retire. Workers who have basic math and reading skills, good communication skills, and some post-secondary training as well as the ability and willingness to learn new methods should have the most opportunities.

### OCCUPATIONS GENERATING NEARLY HALF OF ALL NEW JOBS

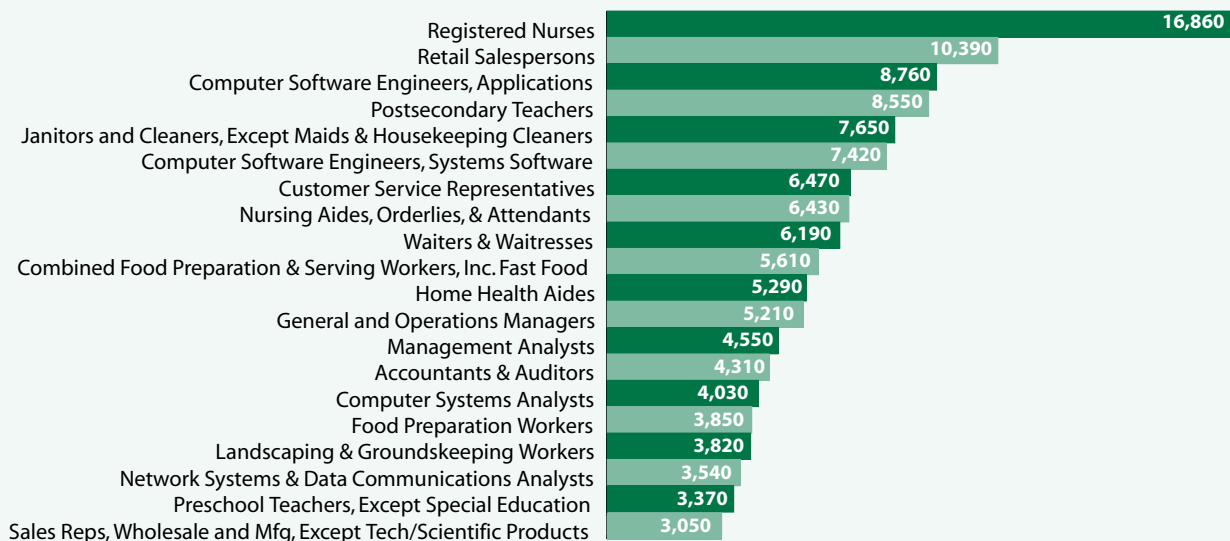


CHART 9

## MANAGERIAL JOBS

Employment in managerial positions will increase more slowly than in the past as fewer low-level managers are replaced when corporations restructure. Nevertheless, managers will gain 73,800 jobs (or 6.9 percent of all jobs) by 2014, a somewhat smaller share than they had in 2004. In total, management jobs are projected to increase by 10.2 percent, or 26,100. Job prospects will differ widely by industry and function. In general, large fast-growing industries will offer the most opportunities. The projected 18 percent growth for computer information systems managers and biological and other natural sciences managers, for example, reflects the growth of the IT and biotech industries. On the other hand the 2.5 percent projected job loss for industrial production managers reflects the offshoring of manufacturing production jobs to lower-cost countries.

Competition for managerial jobs will remain keen, and corporate restructuring will continue to reduce the need for low-level managers, whose range of responsibilities is often limited.

## TRANSPORTATION AND MATERIAL MOVING WORKERS

As logistics software improves efficiency, the demand for transportation and material moving workers — bus drivers, heavy and light truck drivers, and material handlers — should increase 4.7 percent and generate 8,300 new jobs. An additional 39,300 jobs should open up to replace workers who retire. Job prospects will vary widely by industry. In general, truck and delivery route drivers and packers and packagers, who are often the major players in the delivery of goods and services to every sector of the economy, should gain more than three of five new jobs.

### OCCUPATIONS PROJECTED TO LOSE THE MOST JOBS

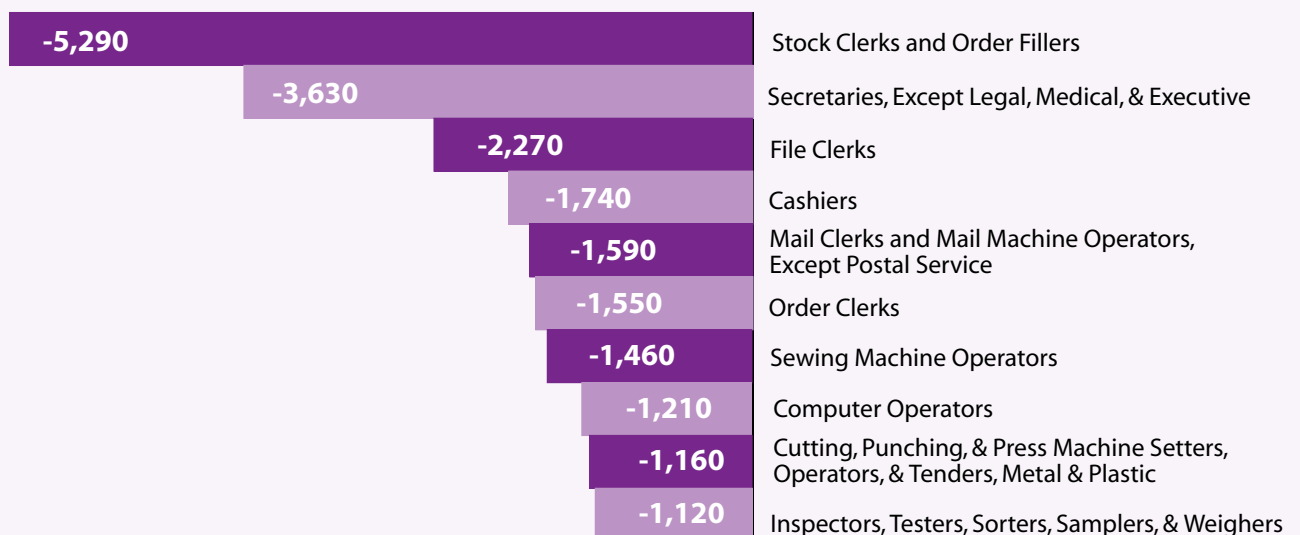


CHART 10

## IMPACT ON EDUCATION AND TRAINING

### EDUCATION AND TRAINING FOR THE JOBS OF THE FUTURE

In this age of globalization and rapid technological and economic change, the importance of education and training and indeed lifelong learning cannot be overstated. Jobs will continue to exist for all levels of education and training. However, jobs for highly skilled workers will increase faster than jobs for minimally skilled workers (Chart 11). Moreover, all jobs will require more technological “know-how” as companies make better use of technology.

#### JOB GROWTH BY LEVEL OF EDUCATION AND TRAINING

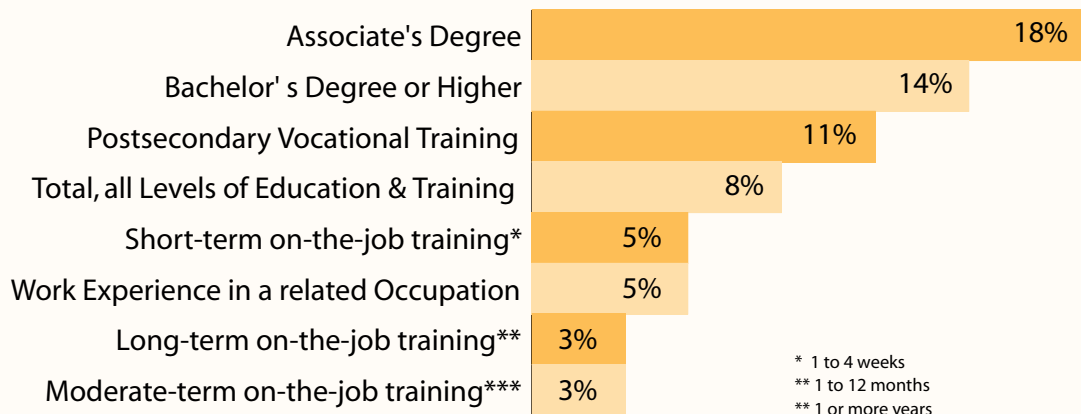


CHART 11

Of the 265,800 new jobs projected to emerge in Massachusetts, more than half (56 percent) will require an associate's degree or higher (Chart 13). Currently only 31 percent of the jobs in Massachusetts require an associate's degree or higher.

The second and third largest category of new jobs (22 percent each) is made up of jobs that can be learned in a relatively short time (i.e., a few days or weeks) and those that require some post-secondary vocational training or one or more years of on-the-job training. Since jobs that can be learned in a relatively short time turn over fairly often and employ the largest number of workers, many of whom are students and other first-time job seekers, they will provide the most openings overall: 38 percent, or 426,700 jobs. (See Charts 12 and 13.)

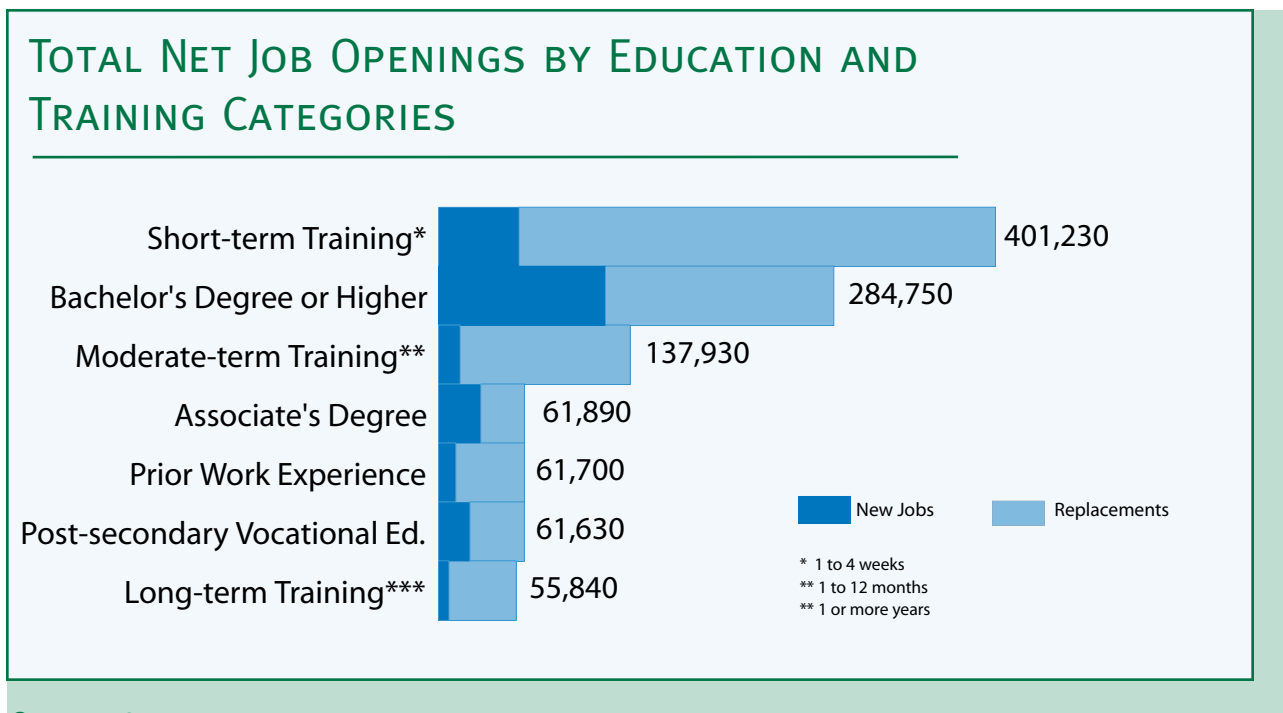


CHART 12



Another 57,700 new jobs (22 percent) should be created for people whose education and training lies between these two extremes. These include jobs for police officers, corrections officers, electricians, carpenters, and chefs.

In summary, education and training will play an ever more critical role in the Massachusetts economy. Due to replacement needs, jobs will be available for people at every educational level. But workers who have more education and training will have more options and better prospects for rising up the career ladder, earning higher salaries and adapting to changes in economic conditions.

Indeed a highly skilled workforce is the asset that will enable Massachusetts to remain a leader in technology and in the emerging new economy.

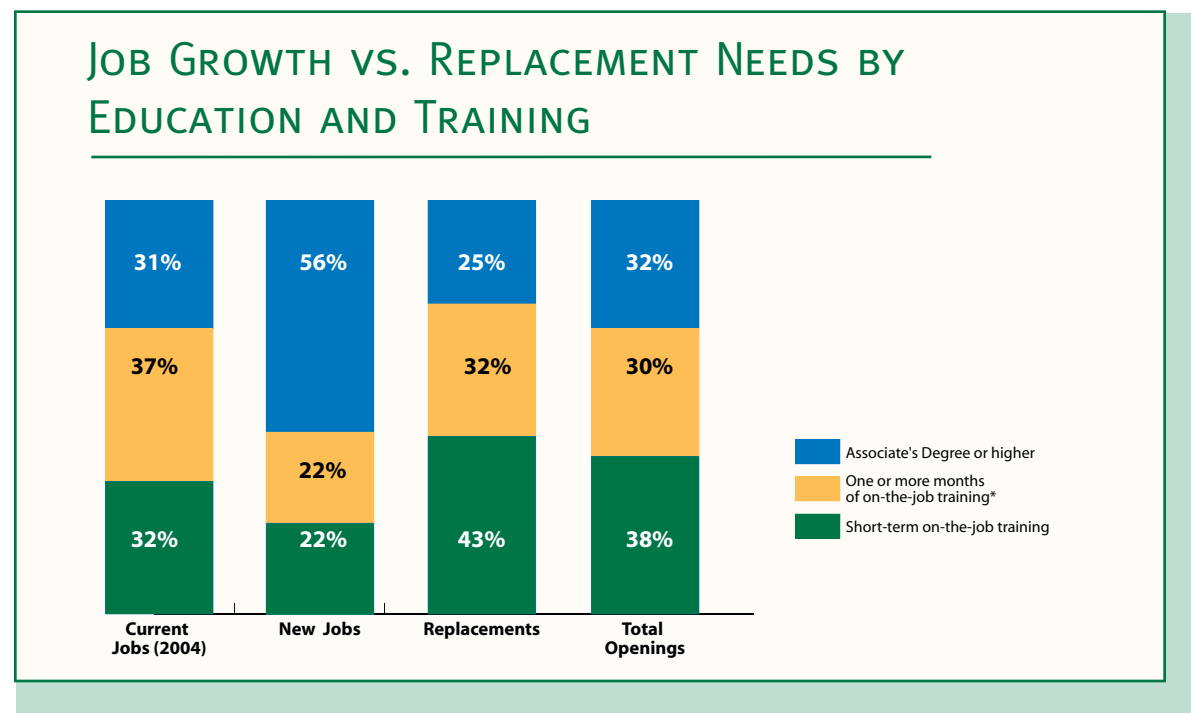


CHART 13

## TABLE A: EMPLOYMENT BY OCCUPATION, 2004 AND PROJECTED 2014

OCCUPATIONAL GROUP	2004		2014		NEW JOBS		REPLACEMENTS	TOTAL OPENING 2004 - 2014	
	JOBS	SHARE	JOBS	SHARE	NUMBER	GROWTH RATE	NUMBER	NET*	TOTAL**
TOTAL, ALL OCCUPATIONS	3,421,650	100.0%	3,687,430	100.0%	265,780	7.8%	799,190	1,064,970	1,115,870
MANAGEMENT	256,560	7.5%	282,620	7.7%	26,060	10.2%	47,720	73,780	74,530
PROFESSIONAL & RELATED	986,840	28.8%	1,130,660	30.7%	143,820	14.6%	184,820	328,640	329,390
SERVICE***	648,560	19.0%	730,700	19.8%	82,130	12.7%	189,180	271,310	271,620
SALES AND RELATED	351,220	10.3%	370,150	10.0%	18,930	5.4%	113,480	132,410	135,840
OFFICE & ADMINISTRATIVE SUPPORT	557,980	16.3%	551,510	15.0%	-6,470	-1.2%	127,130	120,660	145,630
CONSTRUCTION & REPAIR	142,870	4.2%	144,800	3.9%	1,930	1.4%	27,770	29,700	31,450
INSTALLATION, MAINTENANCE & REPAIR	109,940	3.2%	114,960	3.1%	5,020	4.6%	24,880	29,900	31,250
PRODUCTION	190,300	5.6%	176,370	4.8%	-13,940	-7.3%	44,920	30,980	47,040
TRANSPORTATION & MATERIAL MOVING OCCUPATIONS	177,370	5.2%	185,680	5.0%	8,300	4.7%	39,290	47,590	49,130

\* represents the sum of new jobs and replacements

\*\* when employment is expected to decline, total openings will exceed the sum of new job openings and replacements

\*\*\* includes agricultural services

**TABLE B: EMPLOYMENT BY INDUSTRY,  
2004 AND PROJECTED 2014**

2002 NAICS CODE	NAICS TITLE	2004	2014	NEW JOBS	GROWTH RATE
000000	TOTAL EMPLOYMENT	3,421,650	3,687,430	265,780	7.8%
	TOTAL, NONFARM WAGE AND SALARY	3,181,120	3,428,330	247,210	7.8%
	SELF-EMPLOYED	240,530	259,100	18,570	7.7%
54, 55, 56	PROFESSIONAL, SCIENTIFIC AND BUSINESS SERVICES	451,080	538,190	87,110	19.3%
541	PROFESSIONAL AND TECHNICAL SERVICES	224,030	278,370	54,340	24.3%
5411	LEGAL SERVICES	31,100	34,700	3,600	11.6%
5412	ACCOUNTING AND BOOKKEEPING SERVICES	19,300	23,830	4,530	23.5%
5413	ARCHITECTURAL AND ENGINEERING SERVICES	38,100	43,420	5,320	14.0%
5414	SPECIALIZED DESIGN SERVICES	3,100	3,440	340	11.0%
5415	COMPUTER SYSTEMS DESIGN AND RELATED SERVICES	43,000	53,920	10,920	25.4%
5416	MANAGEMENT AND TECHNICAL CONSULTING SERVICES	31,700	46,210	14,510	45.8%
5417	SCIENTIFIC RESEARCH AND DEVELOPMENT SERVICES	36,600	46,390	9,790	26.7%
5418	ADVERTISING AND RELATED SERVICES	11,290	13,890	2,600	23.0%
5419	OTHER PROFESSIONAL AND TECHNICAL SERVICES	9,840	12,570	2,730	27.7%
551	MANAGEMENT OF COMPANIES AND ENTERPRISES	65,300	69,500	4,200	6.4%
56	ADMINISTRATIVE & SUPPORT SERVICES & WASTE MGMT. & REMEDIATION SERV.	161,750	190,320	28,570	17.7%
561	ADMINISTRATIVE AND SUPPORT SERVICES	152,810	179,350	26,540	17.4%
5611	OFFICE ADMINISTRATIVE SERVICES	9,160	11,480	2,320	25.3%
5613	EMPLOYMENT SERVICES	58,200	71,130	12,930	22.2%
5614	BUSINESS SUPPORT SERVICES	8,090	8,670	580	7.2%
5615	TRAVEL ARRANGEMENT AND RESERVATION SERVICES	6,690	6,560	-130	-1.9%
5616	INVESTIGATION AND SECURITY SERVICES	16,750	18,580	1,830	10.9%
5617	SERVICES TO BUILDINGS AND DWELLINGS	48,500	57,440	8,940	18.4%
5619 & 5612	OTHER SUPPORT SERVICES, INCL FACILITIES SUPPORT SERVICES	5,420	5,490	70	1.3%
562	WASTE MANAGEMENT AND REMEDIATION SERVICE	8,940	10,970	2,030	22.7%
5621	WASTE COLLECTION	2,830	3,320	490	17.3%
5622 & 5629	WASTE TREATMENT & DISPOSAL & WASTE MGMT.	6,110	7,650	1,540	25.2%

**TABLE B: EMPLOYMENT BY INDUSTRY,  
2004 AND PROJECTED 2014 (CONTINUED)**

2002 NAICS CODE	NAICS TITLE	2004	2014	NEW JOBS	GROWTH RATE
	HEALTH CARE AND SOCIAL ASSISTANCE	431,710	507,470	75,760	17.5%
62	HEALTHCARE	371,110	434,680	63,570	17.1%
621	AMBULATORY HEALTH CARE SERVICES	123,410	146,670	23,260	18.8%
6211, 6212, 6213, 6214	OFFICES OF HEALTH PRACTITIONERS	77,700	90,380	12,680	16.3%
6216	HOME HEALTH CARE SERVICES	19,200	26,000	6,800	35.4%
6214, 6215, 6219	OUTPATIENT, LABORATORY, & OTHER AMBULATORY CARE SERVICES	26,510	30,290	3,780	14.3%
622	HOSPITALS, PRIVATE	157,200	179,520	22,320	14.2%
623	NURSING AND RESIDENTIAL CARE FACILITIES	90,500	108,490	17,990	19.9%
6231	NURSING CARE FACILITIES	57,140	62,180	5,040	8.8%
6232, 6233, 6239	RESIDENTIAL CARE FACILITIES	33,360	46,310	12,950	38.8%
624	SOCIAL ASSISTANCE	60,600	72,790	12,190	20.1%
6241, 6242, 6243	INDIVIDUAL, FAMILY, COMMUNITY, & VOCATIONAL REHABILITATION SERV.	38,700	44,520	5,820	15.0%
6244	CHILD DAY CARE SERVICES	21,900	28,270	6,370	29.1%
611	EDUCATIONAL SERVICES, PRIVATE	150,500	169,190	18,690	12.4%
6111	ELEMENTARY AND SECONDARY SCHOOLS	29,800	33,440	3,640	12.2%
6112 & 6113	COLLEGES AND UNIVERSITIES, INCL JUNIOR COLLEGES	105,890	117,790	11,900	11.2%
6114, 6115, 6116	OTHER POST-SECONDARY SCHOOLS AND INSTRUCTION, INC. BUSINESS & COMPUTER TRAINING, TECHNICAL AND TRADE SCHOOLS	12,560	15,210	2,650	21.1%
6117	EDUCATIONAL SUPPORT SERVICES	2,250	2,750	500	22.2%
	INFORMATION	87,440	97,820	10,380	11.9%
511	PUBLISHING INDUSTRIES, EXCEPT INTERNET	41,400	51,320	9,920	24.0%
5111	NEWSPAPER, BOOK, AND DIRECTORY PUBLISHER	22,000	22,320	320	1.5%
5112	SOFTWARE PUBLISHERS	19,400	29,000	9,600	49.5%
512	MOTION PICTURE AND SOUND RECORDING INDUSTRY	5,030	5,190	160	3.2%
515	BROADCASTING, EXCEPT INTERNET	6,020	6,130	110	1.8%
5151	RADIO AND TELEVISION BROADCASTING	5,210	5,150	-60	-1.2%
5152	CABLE AND OTHER SUBSCRIPTION PROGRAMMING	810	980	170	21.0%
517	TELECOMMUNICATIONS	21,600	18,770	-2,830	-13.1%
516, 518, 519	INTERNET AND OTHER INFORMATION SERVICES	13,390	16,410	3,020	22.6%

**TABLE B: EMPLOYMENT BY INDUSTRY,  
2004 AND PROJECTED 2014 (CONTINUED)**

2002 NAICS CODE	NAICS TITLE	2004	2014	NEW JOBS	GROWTH RATE
71& 72	LEISURE AND HOSPITALITY	290,800	325,450	34,650	11.9%
71	ARTS, ENTERTAINMENT , AND RECREATION	46,000	55,250	9,250	20.1%
711	PERFORMING ARTS AND SPECTATOR SPORTS	8,560	9,860	1,300	15.2%
712	MUSEUMS, HISTORICAL SITES, ZOOS, AND PAR	5,140	5,630	490	9.5%
713	AMUSEMENTS, GAMBLING, AND RECREATION	32,300	39,760	7,460	23.1%
721	ACCOMMODATION	33,100	36,020	2,920	8.8%
722	FOOD SERVICES AND DRINKING PLACES	211,700	234,180	22,480	10.6%
81	OTHER SERVICES	116,820	128,230	11,410	9.8%
811	REPAIR AND MAINTENANCE	27,010	28,520	1,510	5.6%
8111	AUTOMOTIVE REPAIR AND MAINTENANCE	19,700	21,740	2,040	10.4%
8112	ELECTRONIC EQUIPMENT REPAIR AND MAINTENANCE	3,270	2,630	-640	-19.6%
8113	COMMERCIAL MACHINERY REPAIR AND MAINTENANCE	2,340	2,440	100	4.3%
8114	HOUSEHOLD GOODS REPAIR AND MAINTENANCE	1,700	1,710	10	0.6%
812	PERSONAL AND LAUNDRY SERVICES	35,810	40,920	5,110	14.3%
8121	PERSONAL CARE SERVICES	17,950	21,030	3,080	17.2%
8122	DEATH CARE SERVICES	2,550	2,860	310	12.2%
8123	DRY CLEANING AND LAUNDRY SERVICES	9,040	9,400	360	4.0%
8129	OTHER PERSONAL SERVICES	6,270	7,630	1,360	21.7%
813	MEMBERSHIP ASSOCIATIONS AND ORGANIZATION	54,000	58,790	4,790	8.9%
8132 & 8133	GRANTMAKING & GIVING SERVICES & SOCIAL ADVOCACY ORGANIZATIONS	9,760	10,630	870	8.9%
8131, 8134, 8139	RELIGIOUS, CIVIC, SOCIAL, RELIGIOUS, PROFESSIONAL & SIMILAR ORGANIZATIONS	44,240	48,160	3,920	8.9%
	WHOLESALE & RETAIL TRADE	489,000	511,690	22,690	4.6%
42	WHOLESALE TRADE	133,700	142,580	8,880	6.6%
44-45	RETAIL TRADE	355,300	369,110	13,810	3.9%
	FINANCIAL ACTIVITIES	219,730	230,590	10,860	4.9%
	FINANCE AND INSURANCE	175,310	181,740	6,430	3.7%
521 & 522	CREDIT INTERMEDIATION AND RELATED ACTIVITIES	62,980	62,280	-700	-1.1%
521 & 5221	BANKING	50,020	48,080	-1,940	-3.9%
5222 & 5223	CREDIT INTERMEDIATION	12,960	14,200	1,240	9.6%
523	SECURITIES, COMMODITY CONTRACTS, INVESTMENT	45,580	51,940	6,360	14.0%
524	INSURANCE CARRIERS AND RELATED ACTIVITIES	64,400	65,040	640	1.0%
5241	INSURANCE CARRIERS	41,800	40,760	-1,040	-2.5%
5242	INSURANCE AGENCIES, BROKERAGES, AND RELATED SERVICES	22,600	24,280	1,680	7.4%
525	FUNDS, TRUSTS, AND OTHER FINANCIAL VEHICLES	2,350	2,480	130	5.5%
	REAL ESTATE RENTAL AND LEASING	44,420	48,850	4,430	10.0%
531	REAL ESTATE	30,700	33,900	3,200	10.4%



**TABLE B: EMPLOYMENT BY INDUSTRY,  
2004 AND PROJECTED 2014 (CONTINUED)**

2002 NAICS CODE	NAICS TITLE	2004	2014	NEW JOBS	GROWTH RATE
532	RENTAL AND LEASING SERVICES	13,300	14,500	1,200	9.0%
5321	AUTOMOTIVE EQUIPMENT RENTAL AND LEASING	4,180	4,600	420	10.0%
5322 & 5323	CONSUMER GOODS RENTALS & GENERAL RENTAL CENTERS	7,340	7,900	560	7.6%
5324	MACHINERY AND EQUIPMENT RENTAL AND LEASING	1,780	2,000	220	12.4%
533	LESSORS OF NONFINANCIAL INTANGIBLE ASSETS	420	450	30	7.1%
	TRANSPORTATION, WAREHOUSING & UTILITIES	83,110	85,820	2,710	3.3%
221	UTILITIES	10,000	9,100	-900	-9.0%
	TRANSPORTATION & WAREHOUSING	73,110	76,720	3,610	4.9%
481	AIR TRANSPORTATION	9,000	8,000	-1,000	-11.1%
482 & 483	RAIL, WATER & PIPELINE TRANSPORTATION	4,040	4,050	10	0.2%
484	TRUCK TRANSPORTATION	16,300	17,060	760	4.7%
485	TRANSIT AND GROUND PASSENGER TRANSPORTATION	16,700	18,050	1,350	8.1%
487	SCENIC AND SIGHTSEEING TRANSPORTATION	1,100	1,340	240	21.8%
488	SUPPORT ACTIVITIES FOR TRANSPORTATION	6,000	6,260	260	4.3%
492	COURIERS AND MESSENGERS	12,150	12,760	610	5.0%
493	WAREHOUSING AND STORAGE	7,820	9,200	1,380	17.6%
	GOVERNMENT	407,700	416,380	8,680	2.1%
91	FEDERAL GOVERNMENT	50,700	47,770	-2,930	-5.8%
	POST OFFICE	22,300	20,440	-1,860	-8.3%
	FEDERAL GOVERNMENT, EXCLUDING POST OFFICE	28,400	27,330	-1,070	-3.8%
92	STATE GOVERNMENT, TOTAL	95,600	101,140	5,540	5.8%
	STATE HOSPITALS	6,300	5,800	-500	-7.9%
	STATE EDUCATION	26,900	30,790	3,890	14.5%
	STATE GOVERNMENT, EXCLUDING EDUCATION AND HOSPITALS	62,400	64,550	2,150	3.4%
93	LOCAL GOVERNMENT, TOTAL	261,400	267,470	6,070	2.3%
	LOCAL EDUCATION	161,200	165,570	4,370	2.7%
	LOCAL GOVERNMENT, EXCLUDING EDUCATION	100,200	101,900	1,700	1.7%
101100	NATURAL RESOURCES AND MINING	1,900	1,810	-90	-4.7%
23	CONSTRUCTION	138,400	134,480	-3,920	-2.8%

**TABLE B: EMPLOYMENT BY INDUSTRY,  
2004 AND PROJECTED 2014 (CONTINUED)**

2002 NAICS CODE	NAICS TITLE	2004	2014	NEW JOBS	GROWTH RATE
	MANUFACTURING	312,930	281,210	-31,720	-10.1%
	DURABLE GOODS MANUFACTURING	204,600	185,550	-19,050	-9.3%
321	WOOD PRODUCT MANUFACTURING	3,440	3,580	140	4.1%
327	NONMETALLIC MINERAL PRODUCT MANUFACTURING	6,620	6,740	120	1.8%
331	PRIMARY METAL MANUFACTURING	5,710	5,310	-400	-7.0%
332	FABRICATED METAL PRODUCT MANUFACTURING	36,200	30,710	-5,490	-15.2%
333	MACHINERY MANUFACTURING	21,800	17,170	-4,630	-21.2%
334	COMPUTER AND ELECTRONIC PRODUCT MANUFACTURING	73,800	67,920	-5,880	-8.0%
3341	COMPUTER AND PERIPHERAL EQUIPMENT MFG.	15,800	13,740	-2,060	-13.0%
3342	COMMUNICATIONS EQUIPMENT MANUFACTURING	6,900	5,770	-1,130	-16.4%
3344 & 3343	SEMICONDUCTOR & ELECTRONIC COMPONENT MFG. & AUDIO & VIDEO EQUIP. MFG	22,700	19,300	-3,400	-15.0%
3345	ELECTRONIC INSTRUMENT MANUFACTURING	27,800	28,550	750	2.7%
335	ELECTRICAL EQUIPMENT AND APPLIANCE MFG.	11,400	8,990	-2,410	-21.1%
336	TRANSPORTATION EQUIPMENT MANUFACTURING	14,200	14,540	340	2.4%
3364	AEROSPACE PRODUCT AND PARTS MANUFACTURING	11,260	11,500	240	2.1%
337	FURNITURE AND RELATED PRODUCT MANUFACTURING	5,730	5,580	-150	-2.6%
339	MISCELLANEOUS MANUFACTURING	25,700	25,010	-690	-2.7%
3391	MEDICAL EQUIPMENT AND SUPPLIES MANUFACTURING	12,800	13,270	470	3.7%
	NONDURABLE GOODS MANUFACTURING	108,330	95,660	-12,670	-11.7%
311	FOOD MANUFACTURING	22,900	23,860	960	4.2%
312	BEVERAGE AND TOBACCO PRODUCT MANUFACTURING	2,720	2,660	-60	-2.2%
313	TEXTILE MILLS	8,800	6,000	-2,800	-31.8%
314	TEXTILE PRODUCT MILLS	2,810	1,600	-1,210	-43.1%
315	APPAREL MANUFACTURING	4,170	1,630	-2,540	-60.9%
316	LEATHER AND ALLIED PRODUCT MANUFACTURING	2,090	1,560	-530	-25.4%
322	PAPER MANUFACTURING	13,900	12,720	-1,180	-8.5%
323	PRINTING AND RELATED SUPPORT ACTIVITIES	16,500	13,540	-2,960	-17.9%
324	PETROLEUM AND COAL PRODUCTS MANUFACTURING	1,240	1,240	0	0.0%
325	CHEMICAL MANUFACTURING	16,700	16,600	-100	-0.6%
3254	PHARMACEUTICAL AND MEDICINE MANUFACTURING	6,949	8,700	1,751	25.2%
326	PLASTICS AND RUBBER PRODUCTS MANUFACTURING	16,500	14,250	-2,250	-13.6%

