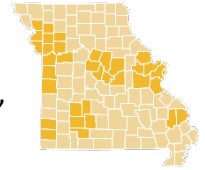


Missouri Metro and Nonmetro Manufacturing Trends

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Manufacturing plays a vital role in Missouri’s economy, employing 9% of the state’s workforce and offering above-average wages. This brief examines trends in production jobs across Missouri’s metropolitan (urban) and nonmetropolitan (rural) counties over the past five years, highlighting areas of manufacturing concentration in the state.



Missouri Manufacturers Gain Jobs at Faster Rate than U.S. Producers

In 2023, Missouri manufacturers employed 293,000 workers at more than 8,000 businesses. This is an increase of 14,778 jobs since 2018, marking 5% growth. Most of these jobs are in the state’s metro counties (74%), where production employment grew 6% over five years, outpacing the overall Missouri metro job growth rate (1.4%). Nonmetro manufacturing job gains were more modest at 3.2%, which is below total employment gains of 7.5% for nonmetro Missouri counties during that time. However, rural Missouri’s manufacturing job growth did outpace the U.S. average for nonmetro counties (-1.1%).

Missouri Manufacturing Job Trends Compared to the U.S.

Area	2023 Mfg. Businesses	2023 Mfg. Jobs	2018-23 Job Chg.	2018-23 MO % Job Chg.	2018-23 U.S. % Job Chg.
Nonmetro Counties	3,496	77,289	2,412	3.2%	-1.1%
Metro Counties	4,798	215,859	12,366	6.1%	2.1%
Missouri	8,293	293,148	14,778	5.3%	1.9%

Source: Lightcast estimates of payroll and self-employment for all Exhibits.

Largest Industries

Transportation equipment production — including aircraft, automobiles and boats — is the largest manufacturing industry in Missouri’s metro counties, accounting for nearly one in five manufacturing jobs. Food processing is the second-largest industry and represents 23% of manufacturing jobs in nonmetro areas.

Fabricated metal products (windows, machine shops) and machinery manufacturing, particularly HVAC and engine components, follow in

Selected Large Industries in Nonmetro and Metro Counties

Industry	% of Nonmetro		% of Metro	
	Jobs	Mfg. Jobs	Jobs	Mfg. Jobs
Food Manufacturing	17,551	23%	28,005	13%
Machinery Manufacturing	9,230	12%	19,620	9%
Transportation Equip. Mfg.	8,178	11%	41,570	19%
Fabricated Metal Prod. Mfg.	7,756	10%	23,973	11%
Wood Product Manufacturing	5,263	7%	2,659	1%
Primary Metal Manufacturing	4,244	5%	3,067	1%
Plastics & Rubber Prod. Mfg.	3,938	5%	12,494	6%
Chemical Manufacturing	3,883	5%	18,962	9%
Computer & Electr. Prod. Mfg.	1,053	1%	12,872	6%
All Other Manufacturing	16,194	21%	52,636	24%
Total	77,289	100%	215,859	100%

employment size and are more evenly distributed across metro and nonmetro areas. Chemical manufacturing, primarily pharmaceuticals and cleaning compounds, is the fifth-largest industry and is more heavily concentrated in urban areas.

Metro and nonmetro location quotient (LQ) analysis, which indicates the concentration of jobs in an industry relative to the same U.S. regions, indicates that Missouri has several unique urban and rural manufacturing specialties. Electrical equipment and components manufacturing (i.e., batteries, transformers, wiring) employed nearly 12,000 workers in 2023 and is 40% more concentrated in statewide employment than the national average (LQ of 1.40). When compared to similar U.S. regions, the LQ for Missouri’s nonmetro areas have an LQ of 1.59 for electrical equipment production, while metro areas have an LQ of 1.36.

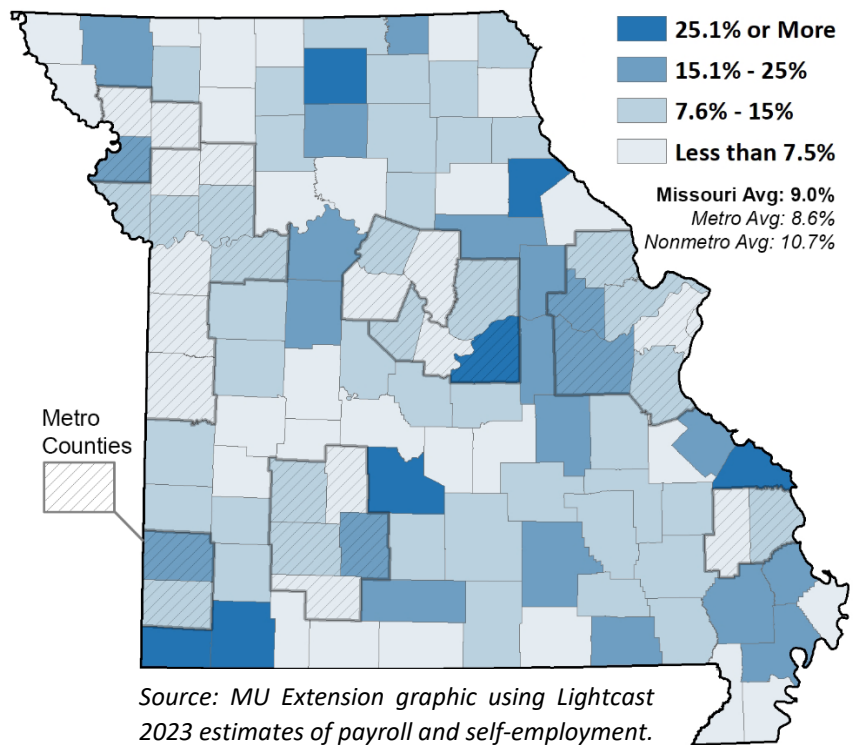
Nonmetro Missouri counties also have other specializations. They are twice as specialized in printing activities (LQ of 2.2) and primary metal production (LQ of 2.0) compared to U.S. nonmetro areas. Relative to U.S. metros, the Show-Me State’s urban areas are 40% more concentrated in transportation equipment manufacturing (LQ of 1.4) and 25% more in chemical manufacturing (LQ of 1.24).

County Manufacturing Concentrations

Manufacturing employs a large workforce in Missouri (9%), one percentage point higher than the U.S. average (8.0%). However, many Missouri counties have a much higher concentration of manufacturing employment.

In 2023, seven Missouri counties—Sullivan, Ralls, Laclede, McDonald, Osage, Barry and Perry—had more than 25% of their workforce employed in manufacturing. Most are nonmetro counties with a focus on food or transportation equipment manufacturing. Other county clusters with higher manufacturing concentrations were found in or near larger metros like St. Louis, Springfield or Columbia, where there are sizeable workforces.

Manufacturing Jobs as Percentage of County Employment



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