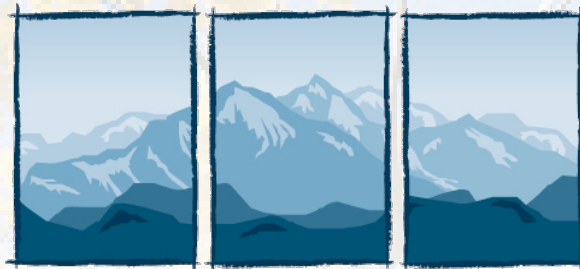


# Primary Employment Trends in Larimer County

January 2008



*Growing Businesses*  
**ENHANCING LIVES**  
**NORTHERN**  
**COLORADO**



**Economic Development Corporation**

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In partnership with Colorado State University's Office of Economic Development and  
Northern Colorado Economic Development Corporation.

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# Executive Summary

In its strategic plan, The Northern Colorado Economic Development Corporation (NCEDC) has made primary job creation and retention a cornerstone organizational priority. For example, NCEDC has set a goal of helping create 500 new primary jobs in Larimer County in 2008, either through attracting new employers or helping existing employers expand.

In order to document the long-term effectiveness of NCEDC efforts in this regard, it is essential to establish a benchmark of the region's primary job base. This includes a snapshot of current primary employment conditions, as well as an analysis of recent trends.

Of course, a fundamental aspect of such analysis is a meaningful definition of primary jobs.

In this brief we 1) define primary employment, 2) identify the region's primary industries 3) provide a primary job employment picture for Larimer County, and 4) estimate the economic impacts of recent primary job projects with which NCEDC was involved. We have three goals in our analysis. First, we seek to provide NCEDC with a comprehensive understanding of primary employment trends in the region. Second, our analysis should aid in identifying comparative strengths and new opportunities for Northern Colorado. This effort establishes a framework for future

analysis that will allow NCEDC to document and enhance its effectiveness and impact. Finally, we provide information that will help better understand the organization's overall economic impact on northern Colorado.

Overall, primary employment in Larimer County has decreased since 2001 but has shown steady growth since 2003. Despite massive layoffs from a few major employers, new firms in primary sectors are still being created and moving to the region and wages in primary sectors have not been severely impacted.

## Key findings:

- In 2006, Larimer County primary employment totaled 43,204 jobs
  - o This represents 34 percent of total employment (127,331 jobs)
  - o Primary employment is down 504 jobs since 2001
  - o Between 2005 and 2006 primary employment increased by 103 jobs
- In 2006 the average earnings per worker for primary jobs in Larimer county was \$53,652
  - o The overall county average in 2006 was \$37,938 per worker
  - o Non-primary workers earned \$29,867 per year in 2006
- Primary employers tend to be larger, on average, than non-primary firms
  - o In 2006, the average primary employer had 17 employees
  - o In 2006, the average non-primary employer had 11 employees
- Since 2004 NCEDC assisted with primary employment projects providing 1,800 direct jobs
  - o These jobs provide an average salary of \$70,893 per year
  - o Through spin-off activities, an additional 3,417 jobs are provided

# What is Primary Employment?

Admittedly, the term “primary employment” is not well understood. Even if a business or organization has heard the term, they seldom refer to themselves in such a way. Additionally, federal, state and local governments do not use this term when collecting and producing economic statistics. Thus, any definition is arbitrary.

Conceptually, however, analysts and economic development practitioners have some sense of a primary employer. Generally, they are thought of as a business or organization that generates a substantial portion of their revenues through exporting goods and services from the region. For example, a manufacturing firm might make a product that it sells in a global rather than local market. Or, an advertising firm might have clients from across the country. In both instances, the business’s economic activity results in new money *injected* into the regional economy. NCEDC’s working definition of primary employers considers those whose revenues from regional exports are at least 50 percent of total revenues.

In contrast is the non-primary sector. Typically, these are the businesses that sell products primarily to fulfill local demand. For example, we can think of restaurants, grocery stores and automobile dealers as businesses

that cater to the needs of the local population. In the case of non-primary employers, we think about the *circulation* of money within the local economy.

Of course, there are some exceptions. For example, in tourism-based communities retail is an important revenue stream generated by visitors bringing money into the economy from the outside. Estes Park—an important gateway to Rocky Mountain National Park—is a prime example of such an economy in Larimer County. And in Fort Collins, numerous local retailers derive a substantial share of income from Colorado State University students, who may be spending money locally that was earned elsewhere, such as through summer jobs or earnings of their parents. Because the vitality of these types of activities are the purview of other organizations, such as Convention and Visitor’s Bureaus and Downtown Development Authorities, NCEDC does not actively work in tourism promotion and related activities.

## Why Primary Employment?

According to one school of thought about economic development, real regional income and employment growth depends critically on the ability to bring in

new money, generally through exports (the primary sector). In turn, this money is re-circulated through the local economy, as exporting businesses purchase locally produced business services, and the employees of primary (and supporting) businesses purchase local goods and services (non-primary).

In this *export-base* model there are two sources of local economic viability. A vibrant primary sector helps bring new money into the community from the outside, and a thriving non-primary sector helps keep it there.

From an economic development perspective, this suggests two policy foci for region’s seeking to increase household income. The first focus is the growth of the regional export base. This can be either through helping retain or grow existing exporting businesses, or encouraging the emergence of new exporters, either through local entrepreneurship or business attraction. The second focus is on enhancing the vitality of the local non-primary sector. Here the goal is to make sure the region has a competitive retail and service economy that prevents immediate leakage of income from the region.

# Classifying Primary Employment Sectors

As noted above, there is no clear cut definition of primary employers. Yet regional economists have developed several approaches to help classify businesses as primary or non-primary. Two of the most common are location quotients, which can help identify a region's comparative advantage, and the "assignment method," which closely examines the products and services that businesses produce, and uses analyst judgment to classify a business as primary or non-primary.

For this report we use both methods. Based on our own understanding of the local economy as well as that of others, we categorize all Larimer County businesses and industries as primary or non-primary based on their four digit NAICS<sup>1</sup> sector classification.

In instances where there was some question, six digit sectors were used. If questions about the business's primary revenue source were still not resolved, we look at location quotients (LQs). The LQ is one common indicator used to determine economic self-sufficiency in any particular industry. The LQ compares a region's industry share of the total regional economy to its national counterpart. The idea is that a higher relative concentration of an industry indicates an export industry. Thus, businesses with relatively high LQs are considered primary. We provide a complete list of all primary and non-primary sectors in the appendix.

Our data source is the Quarterly Census of Employment and Wages (QCEW), published by the Colorado Department of Labor and Employment. This is monthly employment and quarterly wage data given to the state by every employer that pays unemployment insurance.

In our analysis Colorado State University is included as a primary employer. Most Health care and social assistance employment is, as well, but this is subject to debate. Employment in the federal government is classified as primary, whereas government employment that is state or local is considered non-primary.

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<sup>1</sup>The NAICS code is the means by which the US Government classifies business by industry

## A Closer Look at Larimer County Primary Industries

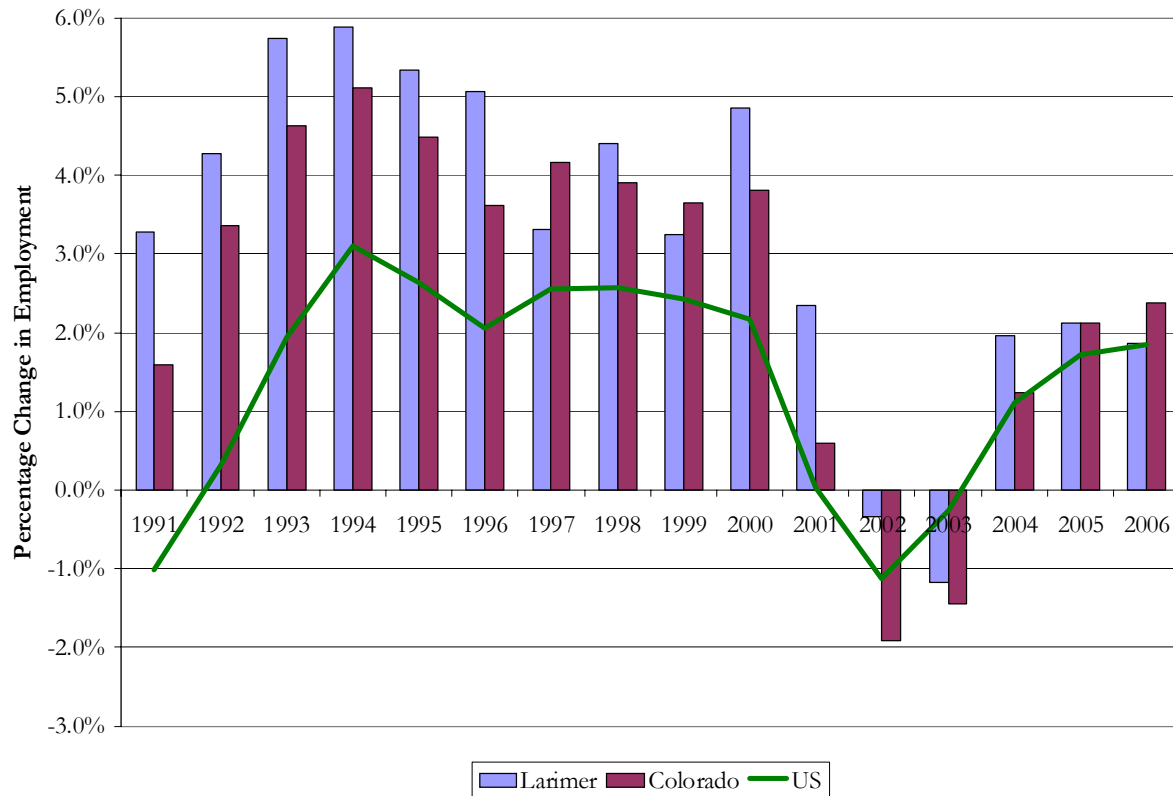
In 2006, Larimer County employment totaled 127,331, representing a 2,329 job (1.9 percent) increase over 2005. Despite lethargic growth following the 2001 recession, total employment in Larimer County increased by 5,449 jobs (4.5 percent) from 2001–06. By comparison, Colorado grew at 2.4 percent from 2005-06 and has seen total employment increase by 2.3

percent since 2001. United States employment grew by 1.8 percent between 2005 and 2006, and 3.3 percent between 2001 and 2006

As Chart 1 shows, total county employment actually declined slightly in 2002 and 2003, as the region felt the effects of dramatic reductions in high tech manufacturing employment and the 2001 US recession. By 2004 the

county's employment woes turned around, with employment annual growth rates averaging 2.0 percent over the past three years. While this is a far cry from the 4.3 percent average annual employment growth rates experienced in Larimer County from 1991-2001, recent employment growth rates have still exceeded both the state and US averages.

**Chart 1. Annual Employment Growth Rates for Larimer County, Colorado and the US: 1991-2006**



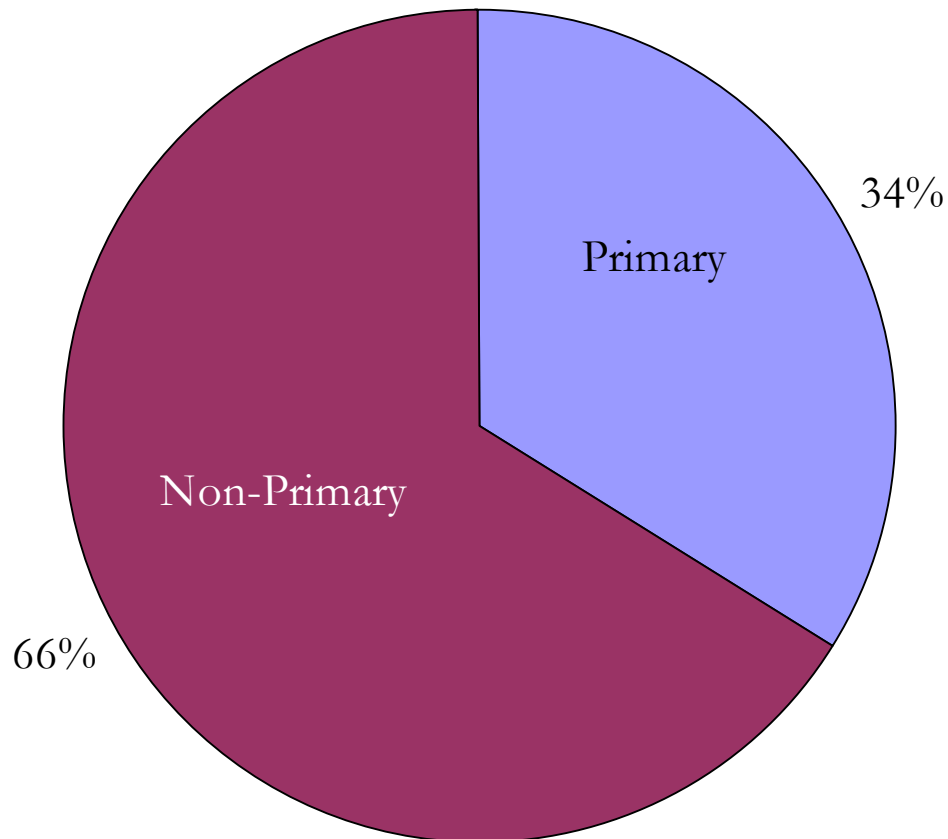
Source: Bureau of Labor Statistics/CES and Colorado Department of Labor and Employment/QCEW

Decomposing total employment into primary and non-primary components, we estimate Larimer

County has 43,204 primary jobs, representing 34 percent of total employment (Chart 2). We estimate

the remaining 84,128 (66 percent of total employment) are in non-primary sectors.

**Chart 2: Breakdown of Larimer County Employment by Primary and Non-Primary, 2006**



Source: Colorado Department of Labor and Employment/QCEW and CSU



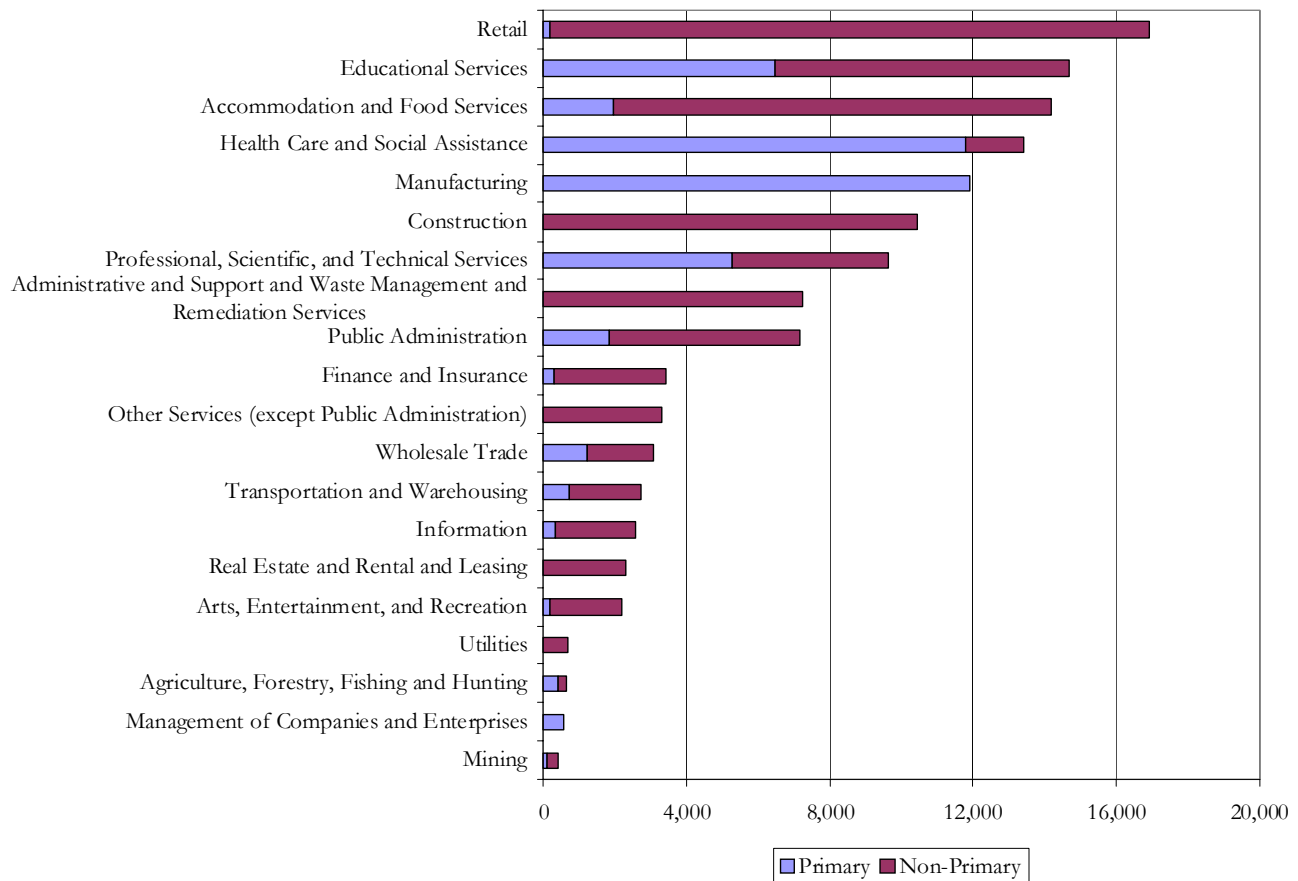
In Chart 3 we show the 2006 employment for Larimer County at the NAICS two-digit level. Employment in each sector is divided into primary and non-primary. The county's 5 largest overall employing sectors are: Retail (16,913 jobs), Educational services (including CSU and public schools) (14,669 jobs),

Accommodation and food services (14,178 jobs), Health care and social assistance (13,417 jobs) and Manufacturing (11,904 jobs). All together, these 5 sectors provide 71,081 jobs, accounting for 56 percent of total county employment.

Looking specifically at primary

components, we see the largest sectors are Manufacturing (11,904 primary jobs), Health care and social assistance (11,801 primary jobs), Educational services (6,447 primary jobs), Professional, scientific and technical services (5,285 primary jobs), and Accommodation and food services (1,961 primary jobs).

**Chart 3. Larimer County Primary Employment by 2-Digit NAICS Sector, 2006**



Source: Colorado Department of Labor and Employment/QCEW and CSU

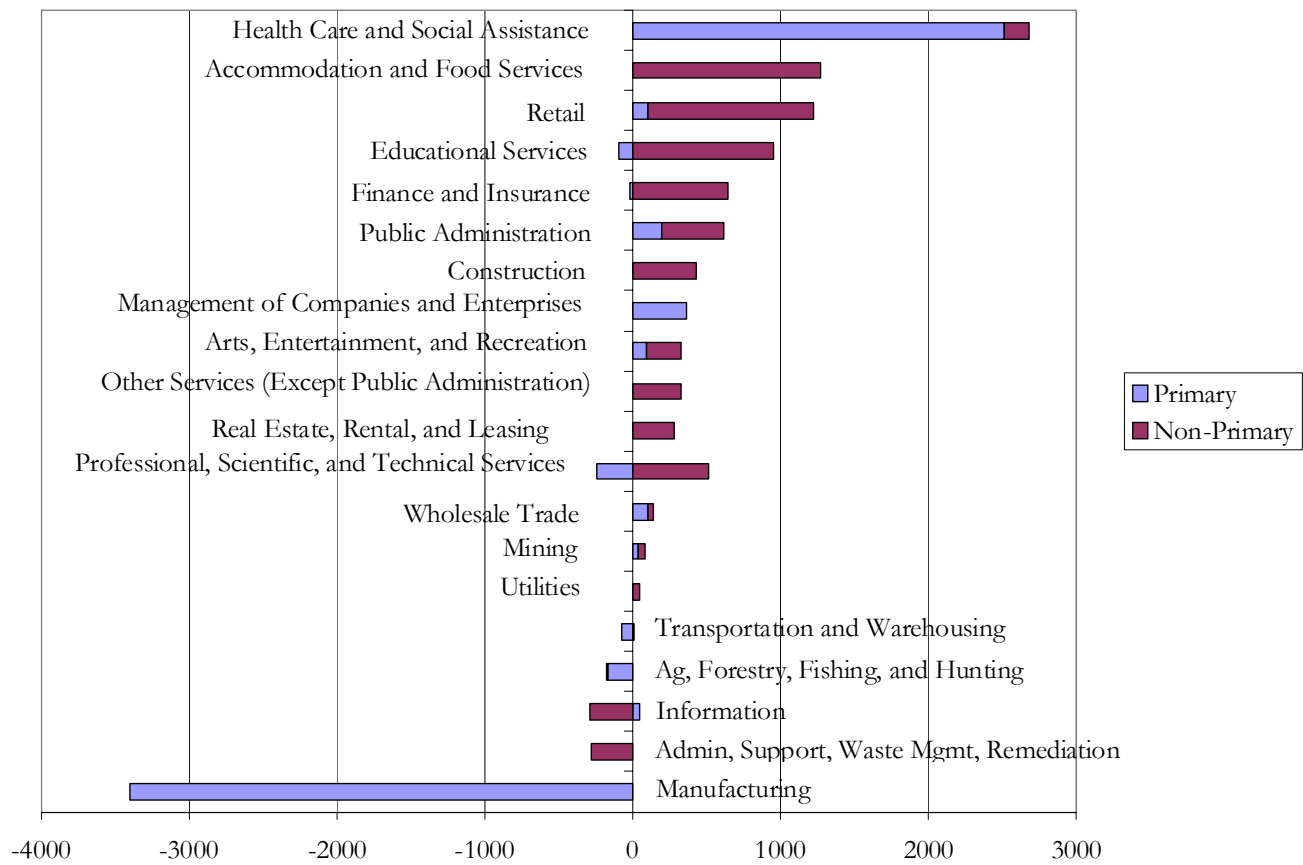


Looking over time, the positive net employment growth that the county experienced from 2001–

2006 was overwhelmingly due to non-primary sectors. Indeed, primary employment decreased by

504 jobs over this time period (Chart 4).

**Chart 4. Larimer County Employment Change, 2001 – 2006**



Source: Colorado Department of Labor and Employment/QCEW and CSU

The job losses in primary sectors were largely due to the Manufacturing sector shedding 3,397 jobs. This was led by the loss of 1,310 positions in Navigational, measuring, electromedical, and control instruments manufacturing (NAICS 3345). Almost equally impacted was Computer and electronic product manufacturing (NAICS 3341) which lost 1,208 positions. The companies hardest hit were Celestica and ITT Industries, Inc.

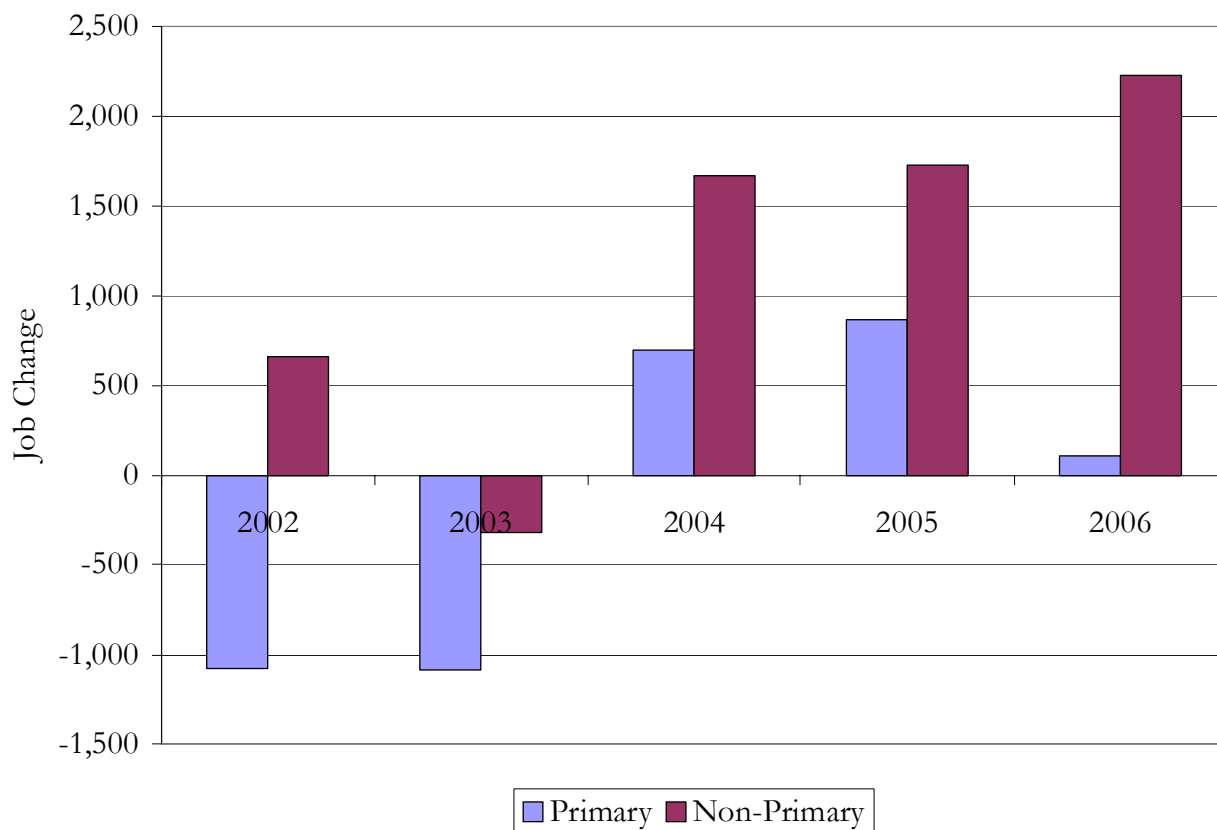
Health care and social assistance was the most robust primary sector. Within this category the largest single sector to contribute to growth over this period was General medical and surgical hospitals (NAICS 6221), adding more than 1,000 new jobs. The second largest growth sector was Offices of physicians (NAICS 6211) which contributed just under 400 new jobs.

Management of companies and enterprises, which added 371

primary jobs, is the only other sector to contribute more than 200 jobs over the six year period.

Chart 5 separates annual employment growth in primary and non-primary sectors since 2001 and shows that the 2001 national recession's biggest local toll was on primary employment. The county's primary sectors shed 2,166 jobs (-5.0 percent) from 2001 to 2003. Some of these jobs were made up for by growth in the non-primary sector, which added 336 net new jobs (0.4 percent) over this time frame.

**Chart 5. Annual Employment Growth in Larimer County: Primary and Non-primary**



Source: Colorado Department of Labor and Employment/QCEW and CSU

Since 2003 primary employment recovered somewhat. Yet non-primary growth gains have exceeded primary growth, and job increases in 2005 were mitigated by primary growth near zero in 2006. Overall, from 2003–2006 primary employment increased 4.1 percent while total employment grew 5.9 percent.

#### Larimer County's Top 10 Employers by Employment Size (2006)

1. Colorado State University
2. Poudre Valley Health Care
3. Hewlett Packard
4. Wal-Mart Distribution
5. Woodward Governor
6. Banner Health Systems
7. Hach Chemical Company
8. Center Partners, Inc.
9. Anheuser Busch, Inc.
10. Advanced Energy

#### Key Larimer County Employment Figures (all growth figures are net changes):

##### Primary Sectors

- 2006 Level: 43,204 jobs
- 2001 – 2006: 504 jobs lost (-1.1 percent)
- 2005 – 2006: 103 jobs added (2.4 percent)

##### Non-Primary

- 2006 Level: 84,128 jobs
- 2001 – 2006: 5,953 jobs added (7.6 percent)
- 2005 – 2006: 2,226 jobs added (2.7 percent)

##### All Sectors

- 2006 Level: 127,331 jobs
- 2001 – 2006: 5,449 jobs added (4.5 percent)
- 2005 – 2006: 2,329 jobs added (1.9 percent)

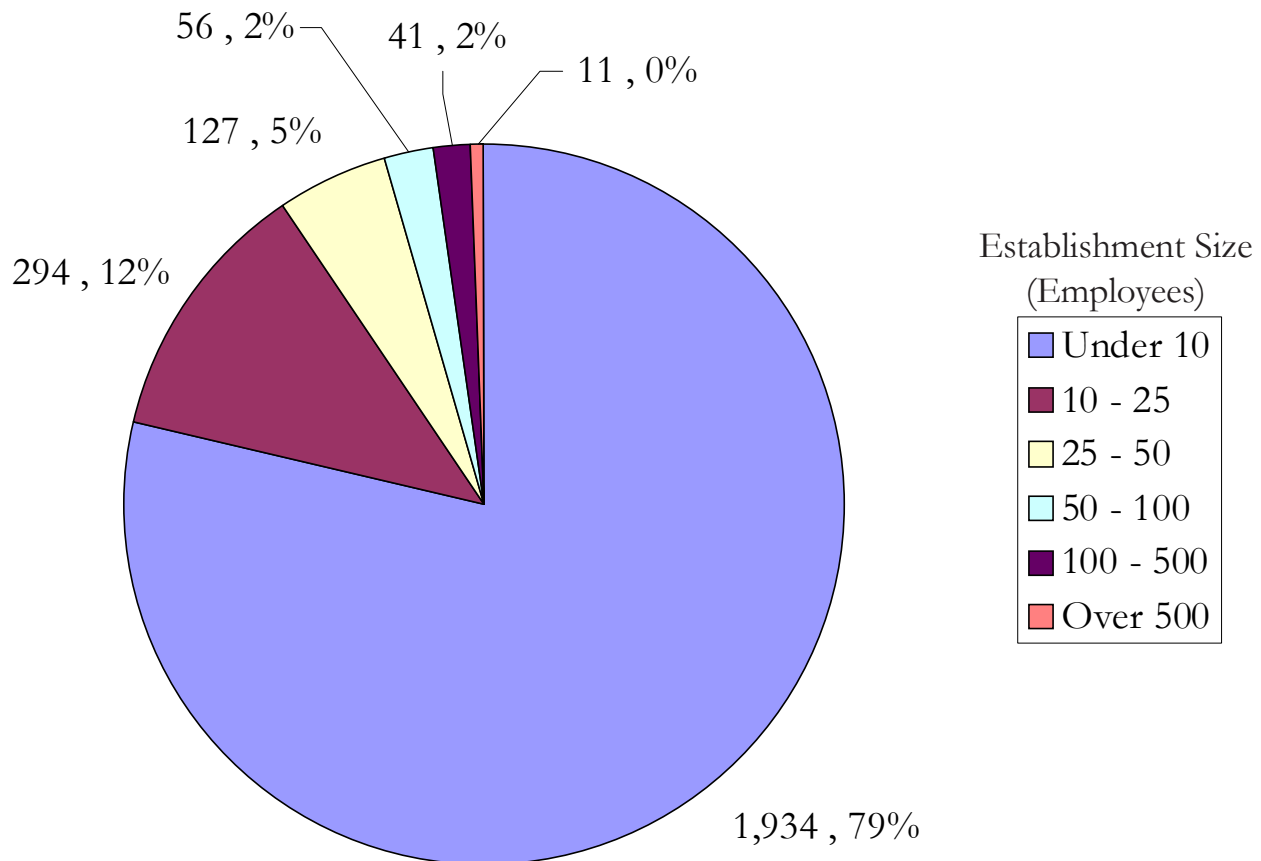
## Primary Establishments in Larimer County

We also are interested in looking at recent trends by establishment size. Overall, QCEW reports Larimer County was home to 10,166 employers in 2006. Of these, 2,501 (19.4 percent) are primary employers.

As a percentage, the vast majority of these primary employers are small, employing fewer than 10 workers. In Chart 6 we present the share of the 2,501 primary

employers by various employment size categories. Overall, 78.5 percent have fewer than 10 employees, and 11.9 percent have between 10 and 25 employees.

**Chart 6. Most Primary Employers are Small: Number of Primary Establishments in Larimer County by Number of Employees: 2006**



Source: Colorado Department of Labor and Employment/QCEW and CSU

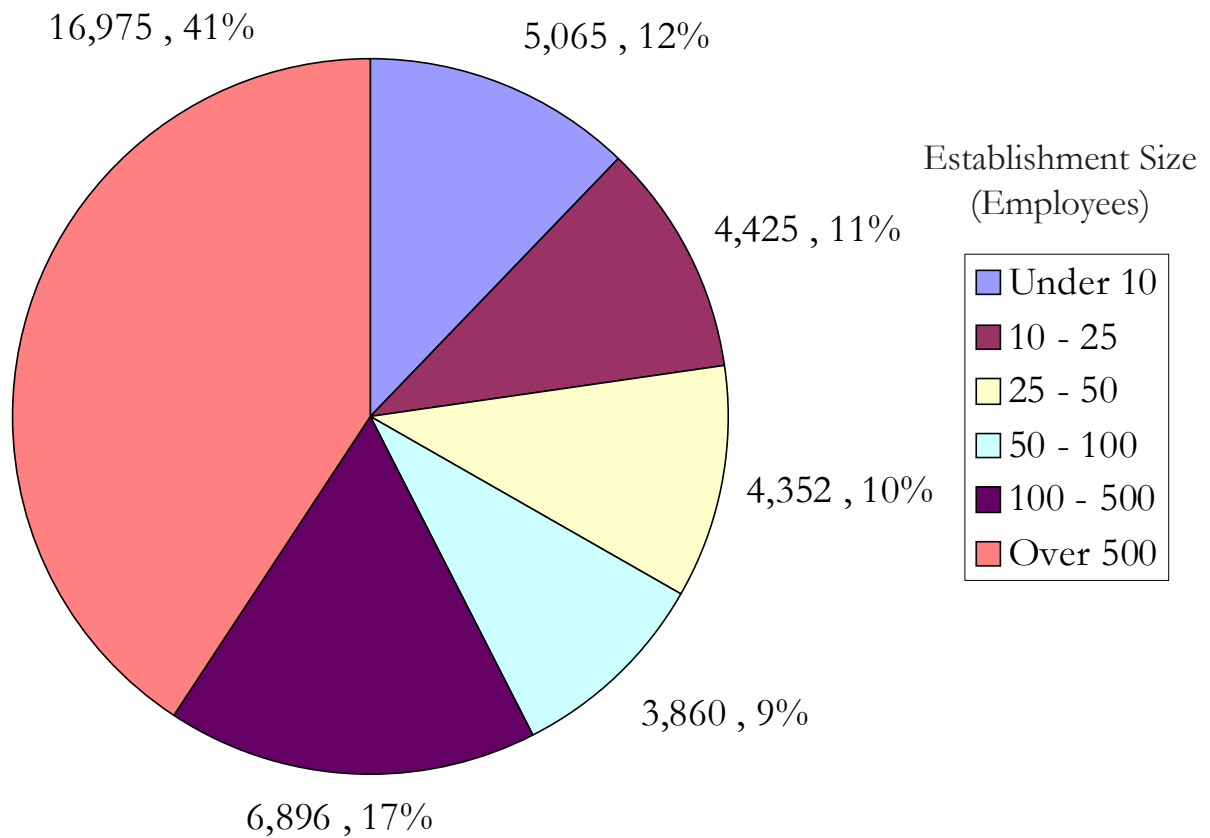
Although small firms (fewer than 50 employees) dominate the landscape in sheer numbers in Larimer County, a substantial share of employment is concentrated in a few large firms. In Chart 7 we break down total employment by establishment size. We find 16,975 (40.8 percent) of all primary jobs

in Larimer County are provided by the 11 firms that have more than 500 employees; this figure is skewed by Colorado State University, which employs more than 6,000 workers.

Conversely, only 12.2 percent (5,065 workers) are employed by the 1,934 businesses with fewer

than 10 employees. This is important because although it suggests that the local economy has a diversified primary employment base, a few large firms still dominate the primary economy. Accordingly, the loss of one or two of these firms could have strong repercussions in Northern Colorado.

**Chart 7. Primary Employment Concentrated in Large Firms: Number of Larimer County Primary Employment by Establishment Size: 2006**



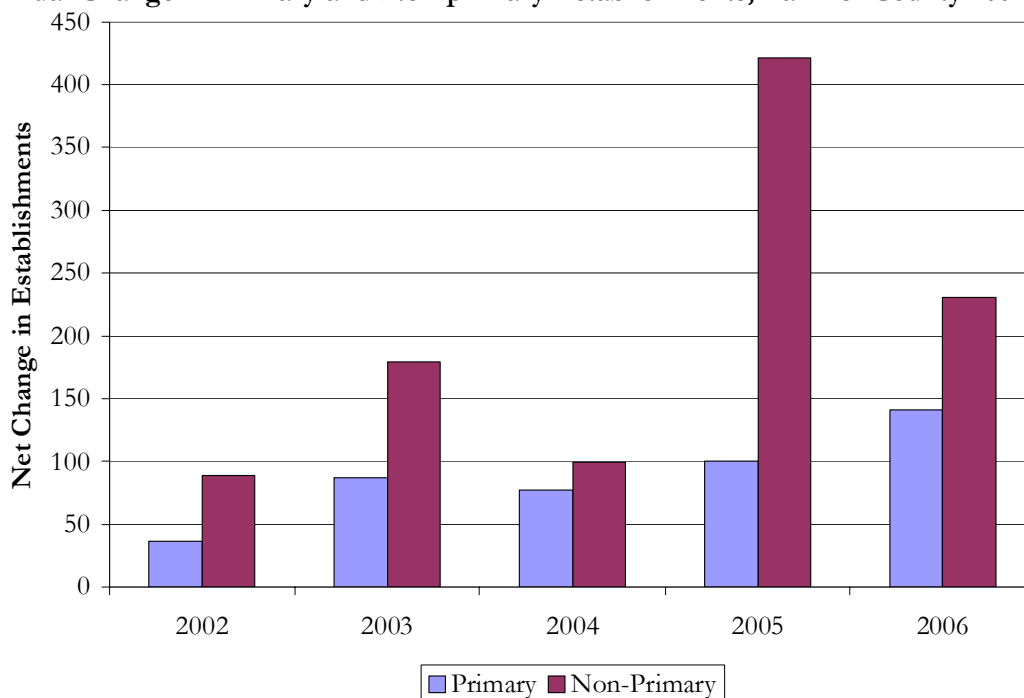
Source: Colorado Department of Labor and Employment/QCEW and CSU

Looking over time, Larimer County has seen a steady growth in the number of both primary and non-primary establishments. From 2001–2006 the county saw a net increase of 441 primary businesses (21.4 percent) (Chart 8). Over the same time period, there was a 1,019 increase in the number of non-primary businesses (15.3 percent).

Larimer County primary establishments saw relatively stable net growth through most of the past six years, excepting 2002 (36 establishments; 1.7 percent). Starting in 2003 the county averaged relatively stable annual increases hovering around 100 net new primary establishments (4.3 percent).

By contrast, non-primary establishment growth experienced greater variation. On average since 2001, 204 net new non-primary establishments came to Larimer County annually. This has been as low as 89 net new establishments in 2002 and as high as 421 in 2005.

**Chart 8. Annual Change in Primary and Non-primary Establishments, Larimer County 2001 – 2006**



Source: Colorado Department of Labor and Employment/QCEW and CSU

Key Larimer County Establishment Figures:	
Primary Establishments (Changes are net)	
•	2006 Level: 2,501
•	2001 – 2006: 441 new establishments (21.4 percent)
•	2005 – 2006: 141 new establishments (6.0 percent)
Non-Primary Establishments	
•	2006 Level: 7,665
•	2001 – 2006: 1,019 new establishments (15.3 percent)
•	2005 – 2006: 227 new establishments (3.1 percent)
All Establishments	
•	2006 Level: 10,166
•	2001 – 2006: 1,457 new establishments (16.7 percent)
•	2005 – 2006: 368 new establishments (3.8 percent)

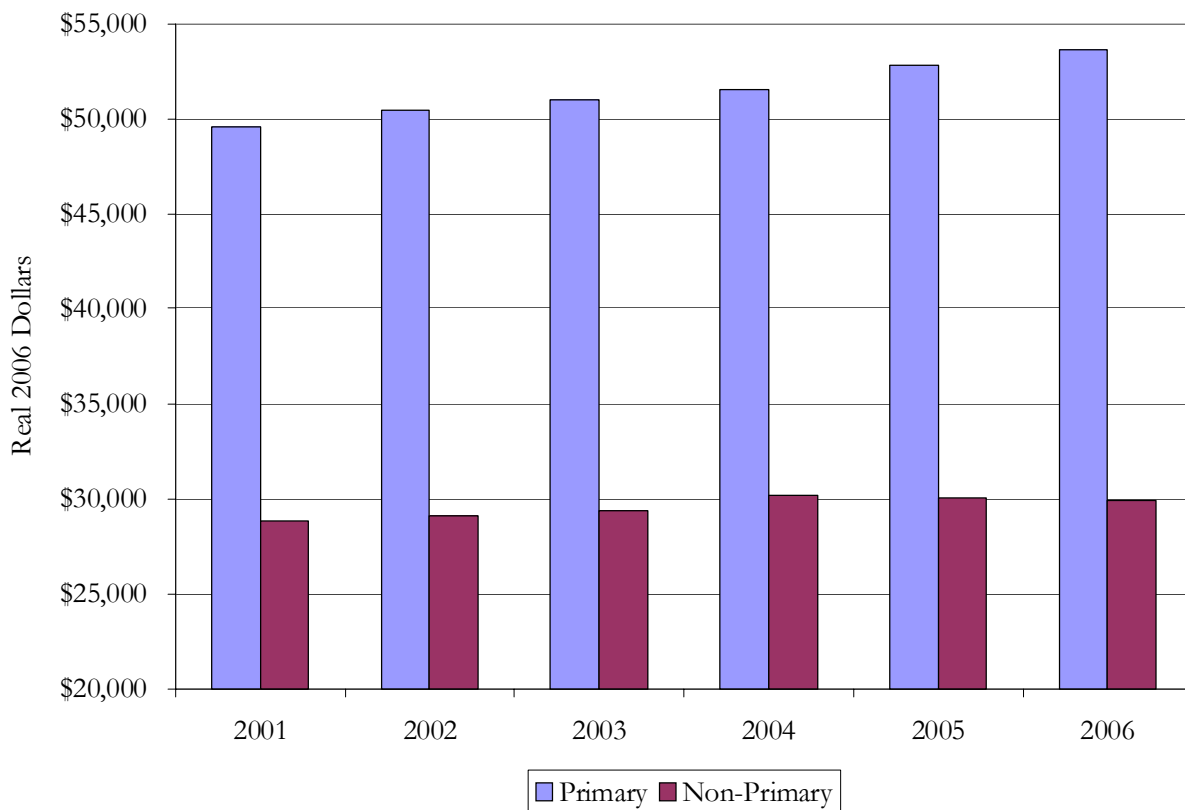
# Primary Job Earnings in Larimer County

Although job change is the most obvious indicator of economic growth, it is equally important to look at regional earnings trends. This is especially true given that NCEDC's overarching mission is to enhance household well-being in Northern Colorado. Indeed, the effect of primary sectors on the local economy is felt nearly as much through their impacts on regional wages as they are by their job numbers.

In Larimer County wages paid by primary employers tend to be substantially higher than those paid by non-primary businesses and organizations.<sup>2</sup> In 2006, for example, Larimer County's primary wage jobs paid an average of \$53,652, while non-primary jobs paid an average of \$29,867.

Even though primary employment decreased from 2001–2006, inflation adjusted worker earnings did not. Primary sector employee pay moved roughly in line with the rest of the economy, increasing by about \$4,077 (7.9 percent) per worker over the six year time span (Chart 9). By comparison, average annual pay in non-primary sectors increased a mere \$1,061 (3.6 percent) over the same time period.

**Chart 9. Annual Earnings per Worker in Primary and Non-primary Sectors (2006 dollars)**



Source: Colorado Department of Labor and Employment/QCEW and CSU

<sup>2</sup>Here, we define earnings per worker as total annual payroll divided by the average number of workers. It is important to note that this definition excludes employer contribution to benefits, such as health insurance and pension. In general, research shows that higher wage jobs are more likely to offer benefits.

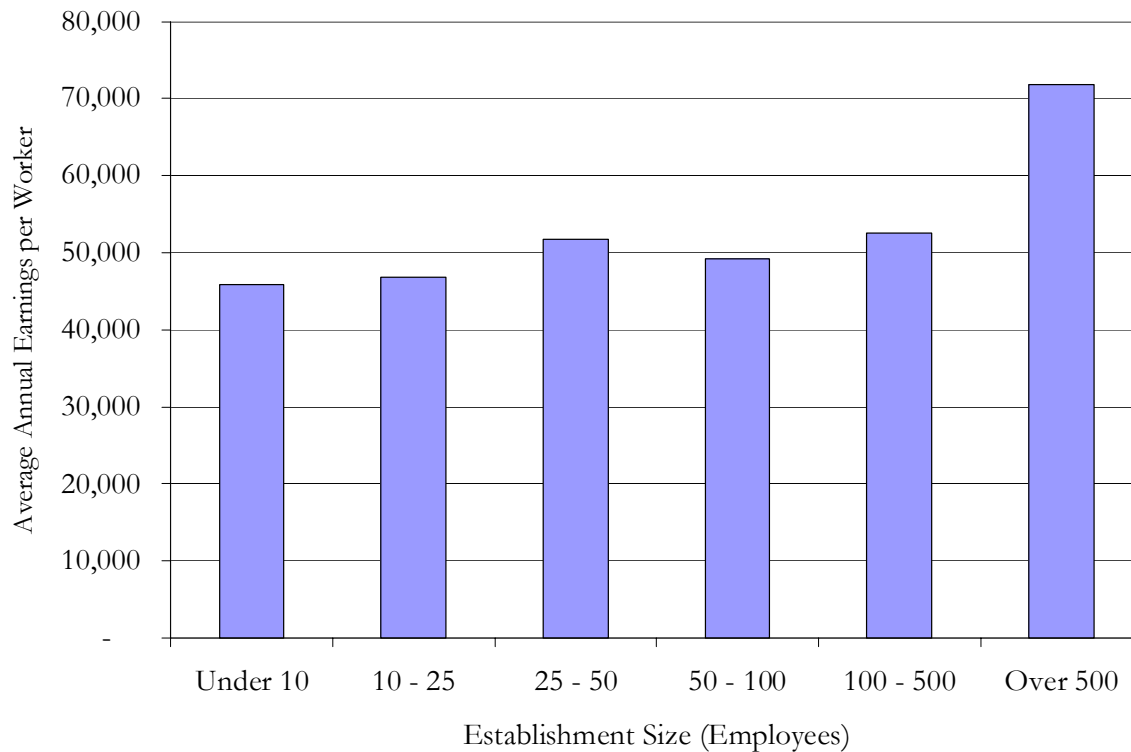


Of primary firms, earnings per worker are highest for the largest firms. In 2006 primary employers in Larimer County with 500 or more employees paid an average

wage of \$71,824, starkly contrasting with the average \$45,885 paid by primary firms with fewer than 10 employees (Chart

10). Earnings per worker for non-primary private employers are essentially the same, regardless of establishment size.

**Chart 10. Average 2006 Larimer County Yearly Earnings per Worker by Primary Establishment Size**



Source: Colorado Department of Labor and Employment/QCEW and CSU

Key Employee Compensation Figures in Larimer County (2006 dollars)	
<b>Primary Sectors</b>	
•	2006 Average Wage: \$53,652
•	2001 – 2006 real wages increased \$4,077 (8.2 percent)
•	2005 – 2006 real wages increased \$815 (1.5 percent)
<b>Non-Primary Private Sectors</b>	
•	2006 Average Wage: \$29,867
•	2001 – 2006 real wages increased \$1,061 (3.7 percent)
•	2005 – 2006 real wages decreased \$194 (-0.6 percent)
<b>All Sectors</b>	
•	2006 Average Wage: \$37,938
•	2001 – 2006 wages increased \$1,683 (4.6 percent)
•	2005 – 2006 wages increased \$24 (0.1 percent)

# NCEDC and Primary Job Creation

As noted above, one of the NCEDC's stated goals is to increase the region's primary employment totals. According to NCEDC, "A solid and growing primary employer based is critical in creating wealth for residents of the region and for the long-term suitability of non-primary job growth."

Overall, NCEDC has three approaches to achieve this. The first is through business retention and expansion (BR&E), an effort that focuses on enhancing the competitive abilities of the region's existing businesses. As a focal point of its BR&E program, NCEDC organizes teams of volunteers to interview local primary employers in an effort to better understand the factors that are most important to them in their ability to compete. NCEDC then shares this information with local policy makers in order to help them better understand the key challenges businesses face, especially at the local level. A related effort of the BR&E program is workforce development, with NCEDC partnering with members of the region's industry clusters to help identify critical workforce needs and establish relevant employee training programs.

The second approach is through business attraction. In this effort NCEDC works with companies that are considering northern Colorado as a region to start up a new facility or relocate an existing one. Here, NCEDC provides

businesses with a detailed understanding of the region's assets and how they match up with business needs. It is important to recognize that NCEDC works closely with local and state governments, private sector business leaders, and other business support organizations in evaluating prospects with respect to how well they fit into current economic development goals.

The final approach NCEDC employs in new job creation is through helping new local start-ups. Here NCEDC works with partners across the region, including CSU and local

government, to help entrepreneurs get started and established. Such assistance may include site location, access to capital, tapping into available state resources, and the like.

Over the past four years, NCEDC has used this three-pronged approach to help spur primary job creation. According to data provided by NCEDC, the organization has partnered with county and local governments and other organizations in helping 14 companies create 1,800 new jobs in Larimer County (Table 1). Overall, these jobs pay an average of \$70,893 per year, which is 84

**Table 1: New Larimer County Jobs with NCEDC Involvement**

<b>Company</b>	<b>Announced New Jobs</b>
Intel	400
AMD	250
Group Publishing	130
Technigraphic Systems	100
Spirae	50
Pelco	50
DirecTech	100
In-Situ, Inc	150
Heska	150
Media Management Tech	50
Kroll Government Services	100
Northern Colorado Rehabilitation	150
Advanced Care Hospital of Northern Colorado	60
Loveland Locomotive Works	60
<b>Total</b>	<b>1,800</b>
<b>Pending</b>	<b>Expected New Jobs</b>
AVA Solar <sup>3</sup>	500
English Language Institute/China (ELIC) <sup>3</sup>	100
Lehman Communications <sup>3</sup>	86
<b>Total</b>	<b>686</b>

<sup>3</sup> AVA Solar, the English Language Institute/China (ELIC), and Lehman Communications are pending and thus not included in the total of NCEDC jobs

percent higher than the county average.

Additionally, NCEDC is working with three companies that have announced plans for Larimer County providing another 686 new jobs.

But the job impacts of these efforts extend beyond the companies themselves. When analyzing the economic impacts of

NCEDC assisted job creation efforts it is important to also recognize spin-off effects. These are jobs supported in the local economy either through purchases made by businesses themselves (such as advertising and accounting services, utilities and other input purchases) and those created through employee purchases, such as food, cars, etc.

To estimate the secondary employment effects we use an economic model known as IMPLAN. Overall, we estimate that spin-off employment supported through NCEDC-assisted efforts totaled 3,417 jobs (Table 2). In these spin-off jobs, the average wage was \$40,737, just above the county average. In total, then, NCEDC-assisted efforts support either directly or indirectly 5,217 jobs, paying an average of \$51,142 per year.

**Table 2: Employment and Annual Earnings in Real 2007 Dollars**

	Jobs	Earnings/Worker	Total Earnings
Direct	1,800	\$ 70,893	\$ 127,608,106
Indirect + Induced	3,417	\$ 40,737	\$ 139,199,771
Total	5,217	\$ 51,142	\$ 266,807,876

## Summary

Between 2001 and 2006, Larimer County's employment total increased by 5,449 jobs. However, over this time the county's primary sectors (i.e., those that largely export goods and services from the county) have lost 504 jobs. This was due primarily to large job losses in high tech manufacturing.

Some of the primary jobs lost following the high tech crash of 2001 have been recently regained

in other sectors. Between 2005 and 2006 the county's primary job totals increased by 103 positions. Much of this is due to the expansion of the health care sector. Despite overall job losses, both primary wages and the number of firms have increased at a steady rate since 2001.

Within primary sectors the highest wages are paid by large establishments with over 500 employees. These establishments

also account for more primary employees and pay higher wages than any other classification used in this paper. Although these business's and organizations are important anchors, the region is strongly reliant on relatively few major employers. It should be noted that Colorado State University accounts for over half of the employees in this category in the 500+ employee category.

# Appendix A

Primary Sectors		Sector	NAICS
Sector	NAICS		
Oilseed and Grain Farming	1111	Commercial and Service Industry	
Vegetable and Melon Farming	1112	Machinery Manufacturing	3333
Other Crop Farming	1119	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	3334
Cattle Ranching and Farming	1121	Metalworking Machinery Manufacturing	3335
Sheep and Goat Farming	1124	Engine, Turbine, and Power Transmission Equipment Manufacturing	3336
Animal Aquaculture	1125	Other General Purpose Machinery Manufacturing	3339
Other Animal Production	1129	Computer and Peripheral Equipment Manufacturing	3341
Logging	1133	Communications Equipment Manufacturing	3342
Support Activities for Crop Production	1151	Audio and Video Equipment Manufacturing	3343
Support Activities for Animal Production	1152	Semiconductor and Other Electronic Component Manufacturing	3344
Support Activities for Forestry	1153	Navigation, Measuring, Electromedical, and Control Instruments Manufacturing	3345
Oil and Gas Extraction	2111	Manufacturing and Reproducing Magnetic and Optical Media	3346
Metal Ore Mining	2122	Electric Lighting Equipment Manufacturing	3351
Support Activities for Mining	2131	Household Appliance Manufacturing	3352
Animal Food Manufacturing	3111	Electrical Equipment Manufacturing	3353
Sugar and Confectionery Product Manufacturing	3113	Other Electrical Equipment and Component Manufacturing	3359
Dairy Product Manufacturing	3115	Motor Vehicle Manufacturing	3361
Animal Slaughtering and Processing	3116	Motor Vehicle Body and Trailer Manufacturing	3362
Bakeries and Tortilla Manufacturing	3118	Motor Vehicle Parts Manufacturing	3363
Other Food Manufacturing	3119	Aerospace Product and Parts Manufacturing	3364
Beverage Manufacturing	3121	Ship and Boat Building	3366
Textile Furnishings Mills	3141	Other Transportation Equipment Manufacturing	3369
Other Textile Product Mills	3149	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	3371
Cut and Sew Apparel Manufacturing	3152	Office Furniture (including Fixtures) Manufacturing	3372
Leather and Hide Tanning and Finishing	3161	Other Furniture Related Product Manufacturing	3379
Other Leather and Allied Product Manufacturing	3169	Medical Equipment and Supplies Manufacturing	3391
Sawmills and Wood Preservation	3211	Other Miscellaneous Manufacturing	3399
Veneer, Plywood, and Engineered Wood Product Manufacturing	3212	Machinery, Equipment, and Supplies Merchant Wholesalers	4238
Other Wood Product Manufacturing	3219	Paper and Paper Product Merchant Wholesalers	4241
Converted Paper Product Manufacturing	3222	Apparel, Piece Goods, and Notions Merchant Wholesalers	4243
Printing and Related Support Activities	3231	Farm Product Raw Material Merchant Wholesalers	4245
Petroleum and Coal Products Manufacturing	3241	Chemical and Allied Products Merchant Wholesalers	4246
Basic Chemical Manufacturing	3251	Miscellaneous Nondurable Goods Merchant Wholesalers	4249
Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	3252	Wholesale Electronic Markets and Agents and Brokers	4251
Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	3253	Electronic Shopping and Mail-Order Houses	4541
Pharmaceutical and Medicine Manufacturing	3254	Scheduled Air Transportation	4811
Paint, Coating, and Adhesive Manufacturing	3255	Nonscheduled Air Transportation	4812
Soap, Cleaning Compound, and Toilet Preparation Manufacturing	3256	General Freight Trucking	4841
Other Chemical Product and Preparation Manufacturing	3259	Specialized Freight Trucking	4842
Plastics Product Manufacturing	3261	Pipeline Transportation of Natural Gas	4862
Clay Product and Refractory Manufacturing	3271	Scenic and Sightseeing Transportation, Land	4871
Glass and Glass Product Manufacturing	3272	Scenic and Sightseeing Transportation, Other	4879
Cement and Concrete Product Manufacturing	3273	Support Activities for Air Transportation	4881
Lime and Gypsum Product Manufacturing	3274	Support Activities for Rail Transportation	4882
Other Nonmetallic Mineral Product Manufacturing	3279	Freight Transportation Arrangement	4885
Iron and Steel Mills and Ferroalloy Manufacturing	3311	Other Support Activities for Transportation	4889
Steel Product Manufacturing from Purchased Steel	3312	Software Publishers	5112
Foundries	3315	Sound Recording Industries	5122
Cutlery and Handtool Manufacturing	3322	Internet Publishing and Broadcasting	5161
Architectural and Structural Metals Manufacturing	3323	Insurance Carriers	5241
Boiler, Tank, and Shipping Container Manufacturing	3324	Computer Systems Design and Related Services	5415
Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	3327	Scientific Research and Development Services	5417
Coating, Engraving, Heat Treating, and Allied Activities	3328	Other Professional, Scientific, and Technical Services	5419
Other Fabricated Metal Product Manufacturing	3329	Management of Companies and Enterprises	5511
Agriculture, Construction, and Mining Machinery Manufacturing	3331	Colleges, Universities, and Professional Schools	6113
Industrial Machinery Manufacturing	3332	Offices of Physicians	6211
		Offices of Dentists	6212
		Offices of Other Health Practitioners	6213
		Outpatient Care Centers	6214

<b>Sector</b>	<b>NAICS</b>
Medical and Diagnostic Laboratories	6215
Home Health Care Services	6216
Other Ambulatory Health Care Services	6219
General Medical and Surgical Hospitals	6221
Psychiatric and Substance Abuse Hospitals	6222
Specialty (except Psychiatric and Substance Abuse) Hospitals	6223
Nursing Care Facilities	6231
Residential Mental Retardation, Mental Health and Substance Abuse Facilities	6232
Community Care Facilities for the Elderly	6233
Other Residential Care Facilities	6239
Spectator Sports	7112
Traveler Accommodation	7211
RV (Recreational Vehicle) Parks and Recreational Camps	7212
Administration of Human Resource Programs	9231
Administration of Environmental Quality Programs	9241
Administration of Economic Programs	9261
National Security and International Affairs	9281

### Non-Primary Sectors

<b>Sector</b>	<b>NAICS</b>
Greenhouse, Nursery, and Floriculture Production	1114
Nonmetallic Mineral Mining and Quarrying	2123
Electric Power Generation, Transmission and Distribution	2211
Water, Sewage and Other Systems	2213
Residential Building Construction	2361
Nonresidential Building Construction	2362
Utility System Construction	2371
Land Subdivision	2372
Highway, Street, and Bridge Construction	2373
Other Heavy and Civil Engineering Construction	2379
Foundation, Structure, and Building Exterior Contractors	2381
Building Equipment Contractors	2382
Building Finishing Contractors	2383
Other Specialty Trade Contractors	2389
Motor Vehicle and Motor Vehicle Parts and Supplies	
Merchant Wholesalers	4231
Furniture and Home Furnishing Merchant Wholesalers	4232
Lumber and Other Construction Materials	
Merchant Wholesalers	4233
Professional and Commercial Equipment and Supplies Merchant Wholesalers	4234
Metal and Mineral (except Petroleum)	
Merchant Wholesalers	4235
Electrical and Electronic Goods Merchant Wholesalers	4236
Hardware, and Plumbing and Heating	
Equipment and Supplies Merchant Wholesalers	4237
Miscellaneous Durable Goods Merchant Wholesalers	4239
Drugs and Druggists' Sundries Merchant Wholesalers	4242
Grocery and Related Product Wholesalers	4244
Petroleum and Petroleum Products Merchant Wholesalers	4247
Beer, Wine, and Distilled Alcoholic Beverage	
Merchant Wholesalers	4248
Automobile Dealers	4411
Other Motor Vehicle Dealers	4412
Automotive Parts, Accessories, and Tire Stores	4413
Furniture Stores	4421
Home Furnishings Stores	4422
Electronics and Appliance Stores	4431
Building Material and Supplies Dealers	4441
Lawn and Garden Equipment and Supplies Stores	4442
Grocery Stores	4451
Specialty Food Stores	4452
Beer, Wine, and Liquor Stores	4453
Health and Personal Care Stores	4461
Gasoline Stations	4471
Clothing Stores	4481
Shoe Stores	4482

<b>Sector</b>	<b>NAICS</b>
Jewelry, Luggage, and Leather Goods Stores	4483
Sporting Goods, Hobby, and Musical Instrument Stores	4511
Book, Periodical, and Music Stores	4512
Department Stores	4521
Other General Merchandise Stores	4529
Florists	4531
Office Supplies, Stationery, and Gift Stores	4532
Used Merchandise Stores	4533
Other Miscellaneous Store Retailers	4539
Vending Machine Operators	4542
Direct Selling Establishments	4543
Taxi and Limousine Service	4853
Charter Bus Industry	4855
Other Transit and Ground Passenger Transportation	4859
Support Activities for Road Transportation	4884
Postal Service	4911
Couriers	4921
Local Messengers and Local Delivery	4922
Warehousing and Storage	4931
Newspaper, Periodical, Book, and Directory Publishers	5111
Motion Picture and Video Industries	5121
Radio and Television Broadcasting	5151
Cable and Other Subscription Programming	5152
Wired Telecommunications Carriers	5171
Wireless Telecommunications Carriers (except Satellite)	5172
Telecommunications Resellers	5173
Satellite Telecommunications	5174
Cable and Other Program Distribution	5175
Internet Service Providers and Web Search Portals	5181
Data Processing, Hosting, and Related Services	5182
Other Information Services	5191
Depository Credit Intermediation	5221
Nondepository Credit Intermediation	5222
Activities Related to Credit Intermediation	5223
Securities and Commodity Contracts Intermediation and Brokerage	5231
Securities and Commodity Exchanges	5232
Other Financial Investment Activities	5239
Agencies, Brokerages, and Other Insurance Related Activities	5242
Other Investment Pools and Funds	5259
Lessors of Real Estate	5311
Offices of Real Estate Agents and Brokers	5312
Activities Related to Real Estate	5313
Automotive Equipment Rental and Leasing	5321
Consumer Goods Rental	5322
General Rental Centers	5323
Commercial and Industrial Machinery and Equipment Rental and Leasing	5324
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	5331
Legal Services	5411
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	5412
Architectural, Engineering, and Related Services	5413
Specialized Design Services	5414
Management, Scientific, and Technical Consulting Services	5416
Advertising and Related Services	5418
Office Administrative Services	5611
Facilities Support Services	5612
Employment Services	5613
Business Support Services	5614
Travel Arrangement and Reservation Services	5615
Investigation and Security Services	5616
Services to Buildings and Dwellings	5617
Other Support Services	5619
Waste Collection	5621
Waste Treatment and Disposal	5622
Remediation and Other Waste Management Services	5629
Elementary and Secondary Schools	6111

<b>Sector</b>	<b>NAICS</b>
Junior Colleges	6112
Business Schools and Computer and Management Training	6114
Technical and Trade Schools	6115
Other Schools and Instruction	6116
Educational Support Services	6117
Individual and Family Services	6241
Community Food and Housing, and Emergency and Other Relief Services	6242
Vocational Rehabilitation Services	6243
Child Day Care Services	6244
Performing Arts Companies	7111
Promoters of Performing Arts, Sports, and Similar Events	7113
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	7114
Independent Artists, Writers, and Performers	7115
Museums, Historical Sites, and Similar Institutions	7121
Amusement Parks and Arcades	7131
Gambling Industries	7132
Other Amusement and Recreation Industries	7139
Rooming and Boarding Houses	7213
Full-Service Restaurants	7221
Limited-Service Eating Places	7222
Special Food Services	7223
Drinking Places (Alcoholic Beverages)	7224
Automotive Repair and Maintenance	8111
Electronic and Precision Equipment Repair and Maintenance	8112
Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	8113
Personal and Household Goods Repair and Maintenance	8114
Personal Care Services	8121
Death Care Services	8122
Drycleaning and Laundry Services	8123
Other Personal Services	8129
Religious Organizations	8131
Grantmaking and Giving Services	8132
Social Advocacy Organizations	8133
Civic and Social Organizations	8134
Business, Professional, Labor, Political, and Similar Organizations	8139
Private Households	8141
Executive, Legislative, and Other General Government Support	9211
Justice, Public Order, and Safety Activities	9221
Administration of Housing Programs, Urban Planning, and Community Development	9251