

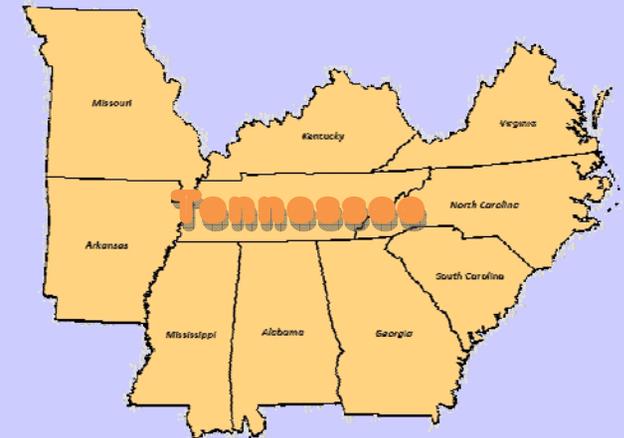


## Economic Impacts from Tennessee AgroForestry

*Information Flyer Set 3*

*for*

*Strategic Planning for Tennessee Agriculture*



Prepared by University of Tennessee Agricultural Modeling & Analysis Group, Drs. Kim Jensen (kjensen@utk.edu) and Burton English (benglish@utk.edu), and Mr. Jamey Menard (rmenard@utk.edu). Department of Agricultural & Resource Economics



# Tennessee: Economic Impacts from AgroForestry

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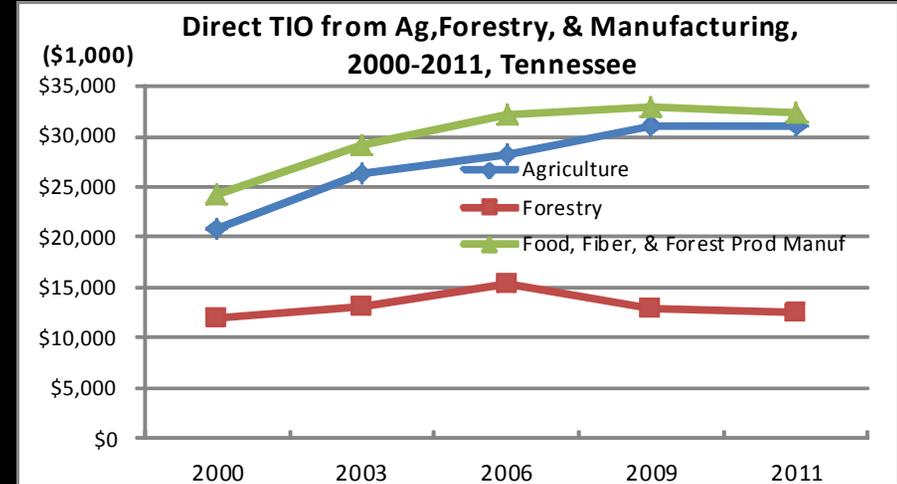
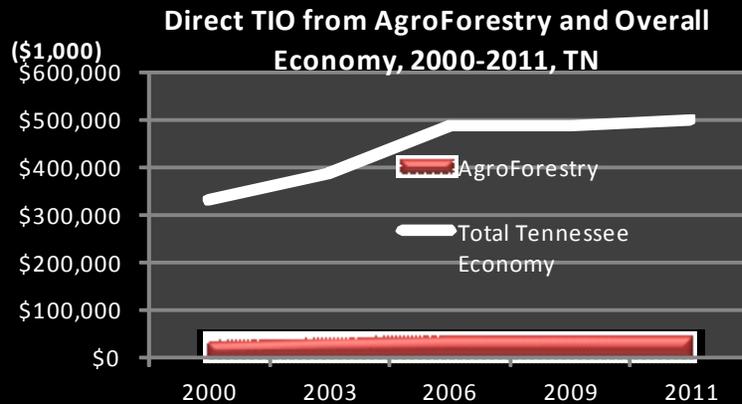
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The purpose of this information flyer is to discuss the contribution of AgroForestry and its components to the Tennessee economy.

From 2000 to 2011, Tennessee's economy grew an average of 11.4% per year. For agroforestry, the average growth rate was 7.7%.

The growth rate in more recent years (2009 and 2011) averaged only 1.3% for the state's economy and 0.1% for agroforestry.

For agroforestry between 2000 and 2011, agriculture had the largest average growth at 10.9% per year, followed by food, fiber, and forest products manufacturing at 7.9%, and forestry at 2.0%.



Tennessee Total Industrial Output (TIO) and Employment, 2011: AgroForestry & State						
	AgroForestry	Agriculture	Forestry	Food, Fiber, & Forest Products Manufacturing	Total Tennessee Economy	AgroForestry % of Total Economy
TIO (\$1,000)						
Direct	\$43,609	\$31,061	\$12,548	\$32,364	\$499,904	8.70%
Total	\$66,359	\$46,712	\$19,647	\$48,797		13.30%
Employment (Jobs)						
Direct	176,282	136,815	39,467	78,218	3,517,918	5.00%
Total	337,880	246,885	90,995	188,113		9.60%

\***AgroForestry** includes primary industries typically associated with agriculture & forest operations such as growing crops, the breeding & feeding of livestock, & the management and logging of trees. Also included are input supplying industries, along with value-added sub-sectors which include food & beverage manufacturing, apparel and textiles, & forestry products manufacturing. **Total Industrial Output** is a measure of economic activity and is defined as the annual dollar value of goods & services that an industry produces. **Employment** (Jobs) is the estimated number of total wage & salary employees (both full- and part-time), as well as self-employed. **Direct impacts** are the output values for agricultural/forestry products produced and/or input/manufacturing industries. **Total impacts** include the direct impacts plus the multiplier effects from input supplier economic activity & additional household spending.

AgroForestry directly contributed \$43.6 billion to the Tennessee economy in 2011, or about 8.7% of the overall economy. When including multiplier effects, the contribution was about \$66.3 billion. This represents about 13.3% of the overall economy. AgroForestry contributed 176,282 jobs directly, and with multiplier effects this increased to 337,880 jobs. AgroForestry employs about 5% of the jobs directly and 9.6% of the jobs with multiplier effects.



# Tennessee: Economic Impacts from Input Supply

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## Special points of interest:

- Agricultural inputs industries provide \$1.7 billion in economic activity directly. When including multiplier effects the economic impacts are \$2.6 billion
- Lawn and garden equipment and pesticide and other agricultural chemicals are key input supply industries, comprising over 68% of the direct economic activity from agricultural input supply industries.
- Commercial logging and forestry provide 174.8 million directly and \$293.1 million in economic activity with multiplier effects. Logging comprises about 92% of primary forestry economic activity.
- The industries with the largest employment are agricultural and forestry support activities, commercial logging, and lawn and garden equipment manufacturing.
- The three primary industries with the largest employment multipliers are pesticide and other agricultural chemical manufacturing, fertilizer manufacturing, and forestry, forest products, and timber tract production.

## Economic Impacts from Input Industries for Agriculture and Forestry

Estimated Economic Impacts from Agricultural Inputs, 2011  
(1,000 \$)

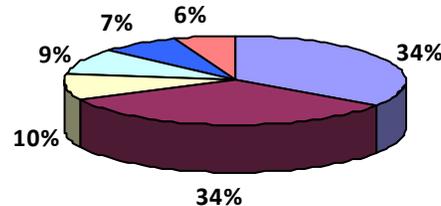
	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
Lawn & Garden Equipment Manuf	\$591,469	1.47	\$869,312	1,449	2.30	3,331
Pesticide & Other Ag Chemical Manuf	\$580,254	1.42	\$826,091	329	5.92	1,949
Farm Machinery & Equipment Manuf	\$165,429	1.50	\$248,890	302	2.90	877
Ag/Forestry Support Activities	\$157,346	1.90	\$299,379	7,009	1.16	8,132
Lime & Gypsum Product Manuf	\$127,554	1.76	\$224,776	276	3.37	930
Fertilizer Manuf	<u>\$101,687</u>	1.62	<u>\$165,013</u>	<u>84</u>	5.50	<u>462</u>
<b>Total</b>	<b>\$1,723,739</b>		<b>\$2,633,522</b>	<b>9,450</b>		<b>15,680</b>

Estimated Economic Impacts from Forestry Inputs, 2011  
(1,000 \$)

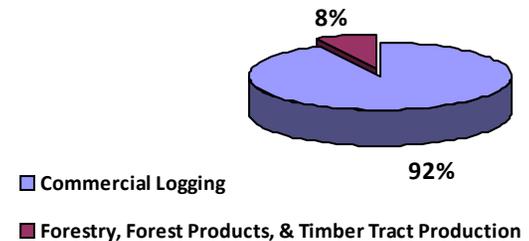
	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
Commercial Logging	\$161,629	1.66	\$268,329	2,745	1.39	3,809
Forestry, Forest Products, & Timber Tract Production	<u>\$13,198</u>	1.88	<u>\$24,783</u>	<u>57</u>	5.05	<u>286</u>
<b>Total</b>	<b>\$174,827</b>		<b>\$293,112</b>	<b>2,801</b>		<b>4,095</b>

Percent of Direct TIO from Agricultural Inputs, 2011

- Lawn & Garden Equipment Manuf
- Pesticide & Other Ag Chemical Manuf
- Farm Machinery & Equipment Manuf
- Ag/Forestry Support Activities
- Lime & Gypsum Product Manuf
- Fertilizer Manuf



Percent of Direct TIO from Forestry Inputs, 2011





# Tennessee: Economic Impacts from Agriculture

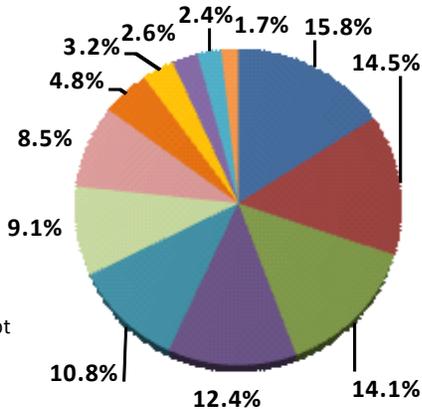
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Percent of TIO from Agriculture, 2011

- Cattle Ranching & Farming
- Grain Farming
- Poultry & Egg Production
- Oilseed Farming
- Cotton Farming
- All Other Crop Farming
- Greenhouse, Nursery, & Floriculture Production
- Dairy Cattle & Milk Production
- Animal Production, except Cattle/Poultry/Eggs
- Tobacco Farming
- Vegetable & Melon Farming
- Other



Estimated Economic Impacts from Agriculture, 2011

	(1,000 \$)			Employment (Jobs)		
	Direct	TIO Multiplier	Total	Direct	Multiplier	Total
Cattle Ranching & Farming	\$586,323	1.83	\$1,070,727	10,035	1.57	15,797
Grain Farming	\$537,449	1.50	\$805,673	23,391	1.13	26,347
Poultry & Egg Production	\$523,825	1.47	\$768,362	2,197	1.84	4,043
Oilseed Farming	\$461,334	1.38	\$635,812	13,182	1.15	15,124
Cotton Farming	\$401,123	1.57	\$629,159	4,446	1.57	6,968
All Other Crop Farming	\$337,100	1.58	\$533,671	3,726	1.60	5,943
Greenhouse, Nursery, & Floriculture Production	\$316,700	1.31	\$416,203	5,270	1.20	6,330
Dairy Cattle & Milk Production	\$179,133	1.49	\$267,022	2,854	1.28	3,662
Animal Production, except Cattle/Poultry/Eggs	\$120,161	1.43	\$171,444	6,823	1.09	7,464
Tobacco Farming	\$96,875	1.61	\$155,536	3,150	1.21	3,817
Vegetable & Melon Farming	\$89,259	1.44	\$128,583	1,010	1.50	1,510
Commercial Hunting & Trapping	\$52,743	1.68	\$88,441	671	1.45	970
Fruit Farming	\$9,554	1.44	\$13,748	126	1.50	188
Tree Nut Farming	\$761	1.47	\$1,116	20	1.25	24
Sugarcane & Sugar Beet Farming	\$0	0.0	\$0	0	0.0	0
Commercial Fishing	\$0	0.0	\$0	0	0.0	0
<b>Total</b>	<b>\$3,712,339</b>		<b>\$5,685,498</b>	<b>76,900</b>		<b>98,187</b>

**Special points of interest:**

- The agricultural industries with the largest direct economic activity are cattle ranching and farming (\$586.3 million), grain farming (\$537.4 million), poultry and egg production (\$523.8 million), oilseed farming (\$461.3 million), cotton farming (\$401.1 million), other crop farming (\$337.1 million), greenhouse/nursery (\$316.7 million), and dairy cattle and milk production (\$179.1 million).
- The industries with the largest number of employees are grain farming (23,391), oilseed farming (13,182), cattle ranching and farming (10,035), animal Production (except Cattle/Poultry/Eggs) (6,823), greenhouse/nursery (5,270), cotton farming, tobacco farming (3,150), and dairy cattle and milk production (2,854).
- For each job created in the industry,
  - Poultry and egg production: .84 additional jobs
  - Cattle ranching & farming: .57 additional jobs
  - Other crop farming: .60 additional jobs
  - Cotton farming: .57 additional jobs

are created in other industries through multiplier effects.



# Tennessee: Economic Impacts from Forestry

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## Special points of interest:

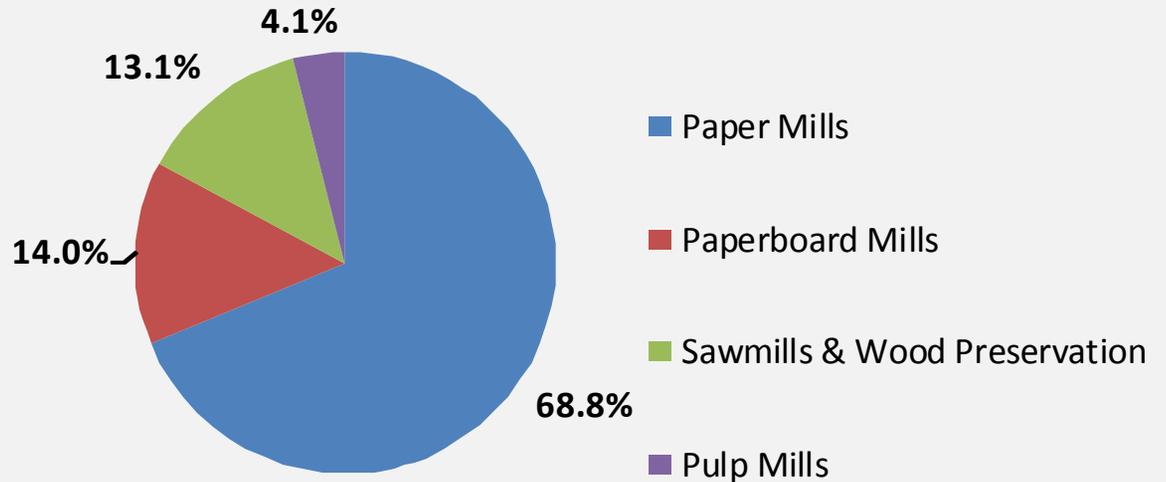
- In total, primary forestry based industries provide about \$5.6 billion in economic activity directly and \$9.0 billion with multiplier effects.
- Primary forest based industries provided 8,914 jobs directly and 31,806 with multiplier effects.
- Paper mills provided about 68.8% of the economic activity from primary forestry industries in 2011. This was followed by paperboard mills, 14%, and sawmills 13.1%.
- The largest employment multipliers were for paperboard mills (4.65), pulp mills (4.62), and paper mills (4.39).
- For each job created,

*Paperboard mills create an additional 3.65 jobs*  
*Paper mills create an additional 3.39 jobs*  
*Pulp mills create an additional 3.62 jobs*  
*Sawmills create an additional .96 jobs*

in other industries through multiplier effects.

	Estimated Economic Impacts from Forestry, 2011 (1,000 \$)					
	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
Paper Mills	\$3,876,279	1.57	\$6,097,224	4,487	4.39	19,708
Paperboard Mills	\$788,213	1.65	\$1,299,729	968	4.65	4,497
Sawmills & Wood Preservation	\$740,628	1.57	\$1,162,837	3,148	1.96	6,167
Pulp Mills	\$228,614	1.71	\$390,639	311	4.62	1,434
<b>Total</b>	<b>\$5,633,735</b>		<b>\$8,950,429</b>	<b>8,914</b>		<b>31,806</b>

### Percent of TIO from Forestry, 2011





# Tennessee: Economic Impacts from Food & Fiber Products Manufacturing

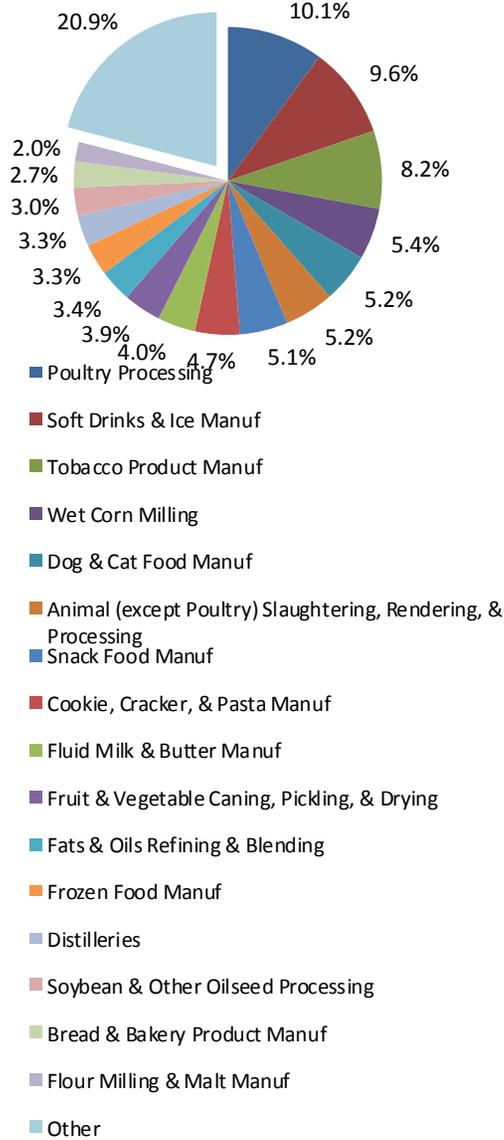
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## Estimated Economic Impacts Food and Fiber Products Manufacturing, 2011 (1,000 \$)

Share of Direct Economic Activity from Food & Fiber Prod. Manuf.



	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
Poultry Processing	\$2,587,801	1.63	\$4,211,383	7,031	2.52	17,717
Soft Drinks & Ice Manuf	\$2,467,392	1.51	\$2,624,350	3,477	3.18	11,072
Tobacco Product Manuf	\$2,099,683	1.25	\$2,624,350	877	4.13	3,618
Wet Corn Milling	\$1,381,955	1.55	\$2,140,613	573	10.20	5,842
Dog & Cat Food Manuf	\$1,337,351	1.45	\$1,942,066	923	5.16	4,763
Animal (except Poultry) Slaughtering, Rendering, & Processing	\$1,323,337	1.37	\$1,813,900	4,408	1.80	7,957
Snack Food Manuf	\$1,298,816	1.46	\$1,901,696	1,765	3.26	5,745
Cookie, Cracker, & Pasta Manuf	\$1,196,167	1.62	\$1,943,104	2,686	2.75	7,386
Fluid Milk & Butter Manuf	\$1,024,863	1.51	\$1,547,884	989	4.12	4,072
Fruit & Vegetable Caning, Pickling, & Drying	\$1,011,188	1.54	\$1,552,200	1,864	2.89	5,391
Fats & Oils Refining & Blending	\$870,277	1.37	\$1,191,813	213	8.61	1,837
Frozen Food Manuf	\$849,256	1.66	\$1,410,487	2,477	2.49	6,170
Distilleries	\$833,352	1.32	\$1,097,477	560	3.96	2,219
Soybean & Other Oilseed Processing	\$760,462	1.19	\$904,465	442	3.19	1,411
Bread & Bakery Product Manuf	\$699,608	1.79	\$1,200,014	3,866	2.02	7,793
Flour Milling & Malt Manuf	\$523,556	1.65	\$862,237	458	5.77	2,643
Nonchocolate Confectionery Manuf	\$496,388	1.60	\$794,768	1,282	2.47	3,165
Confectionery Manuf from Purchased Chocolate	\$488,622	1.55	\$755,984	1,316	2.27	2,984
Fiber, Yarn, & Thread Mills	\$461,201	1.45	\$666,663	1,514	1.77	2,675
Dry, Condensed, & Evaporated Dairy Product Manuf	\$447,481	1.57	\$701,115	559	3.63	2,028
Nonwoven Fabric Mills	\$409,451	1.41	\$578,068	809	2.31	1,870
Men's' & Boys' Cut & Sew Apparel Manuf	\$377,053	1.69	\$638,931	2,533	1.87	4,736
Breakfast Cereal Manuf	\$369,594	1.50	\$553,581	421	3.79	1,593
All Other Textile Product Mills	\$263,885	1.55	\$408,113	1,542	1.64	2,534
Seasoning & Dressing Manuf	\$240,359	1.55	\$373,237	456	2.88	1,315
Other Animal Food Manuf	\$173,034	1.47	\$254,897	152	4.25	646
Cheese Manuf	\$163,602	1.41	\$230,843	200	3.10	620
Coffee & Tea Manuf	\$148,224	1.39	\$206,309	191	3.17	606
Textile & Fabric Finishing Mills	\$138,411	1.60	\$221,296	665	1.89	1,256
Apparel Knitting Mills	\$125,135	1.68	\$210,513	865	1.73	1,498
Fabric Coating Mills	\$123,286	1.51	\$186,205	352	2.20	773



# Tennessee: Economic Impacts from Food & Fiber Products Manuf, Contd.

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## Estimated Economic Impacts from Food and Fiber Products Manufacturing, 2011 (CONT'D) (1,000 \$)

### Points of Interest:

- In total, food and fiber products manufacturing generate \$25.6 billion in direct economic activity and \$38.4 in total economic activity. These industries employ over 50,000 directly and over 133,000 when including multiplier effects.
- Within the state, food and fiber manufacturing is very diverse, with only poultry processing holding over a 10% share of direct economic activity.
- Poultry processing is followed by soft drinks, tobacco, wet corn milling, and dog and cat food manufacturing in terms of direct economic activity.
- The industries with the largest employment are poultry (7,031), animal slaughter and processing (4,408), bread and bakery products (3,866), and soft drinks (3,477).
- Industries with the largest employment multipliers include wet corn milling (10.2), fats and oils refining (8.6), flour milling (5.8), and dog & cat food manufacturing (5.2).

	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
All Other Food Manuf	\$104,292	1.58	\$164,689	309	2.37	731
Ice Cream & Frozen Desert Manuf	\$101,038	1.74	\$175,646	264	2.68	706
Textile Bag & Canvas Mills	\$100,357	1.58	\$158,852	786	1.55	1,215
Carpet & Rug Mills	\$74,318	1.44	\$106,923	244	1.73	423
Footwear Manuf	\$73,875	1.60	\$118,410	569	1.59	907
Cut & Sew Apparel Contractors	\$71,914	1.85	\$133,058	1,129	1.43	1,610
Sugar Cane Mills & Refining	\$58,822	1.44	\$84,745	69	3.54	246
Wineries	\$53,605	1.44	\$77,007	170	1.97	335
Chocolate & Confectionery Manuf from Cocoa Beans	\$42,222	1.48	\$62,612	58	3.16	183
Women's & Girls' Cut & Sew Apparel Manuf	\$40,872	1.80	\$73,717	202	2.40	485
Tortilla Manuf	\$34,651	1.73	\$59,877	168	2.06	344
Knit Fabric Mills	\$33,548	1.67	\$55,865	168	1.94	325
Leather & Hide Tanning & Finishing	\$28,331	1.66	\$47,106	68	2.97	203
Flavoring Syrup & Concentrate Manuf	\$27,638	1.22	\$33,703	9	5.37	49
Breweries	\$24,771	1.47	\$36,318	28	3.49	98
Other Cut & Sew Apparel Manuf	\$23,894	1.80	\$42,994	238	1.64	390
Curtain & Linen Mills	\$21,023	1.45	\$30,537	143	1.47	211
Narrow Fabric Mills & Schiffli Machine Embroidery	\$19,742	1.65	\$32,589	133	1.68	224
Other Leather & Allied Product Manuf	\$15,386	1.67	\$25,656	130	1.60	207
Apparel Accessories & Other Apparel Manuf	\$11,978	1.73	\$20,736	113	1.59	179
Broadwoven Fabric Mills	\$1,479	1.54	\$2,275	6	1.99	11
Beet Sugar Manuf	\$0	0.00	\$0	0	0.00	0
Seafood Product Preparation & Packaging	\$0	0.00	\$0	0	0.00	0
<b>Total</b>	<b>\$25,624,547</b>		<b>\$38,393,393</b>	<b>50,466</b>		<b>133,018</b>

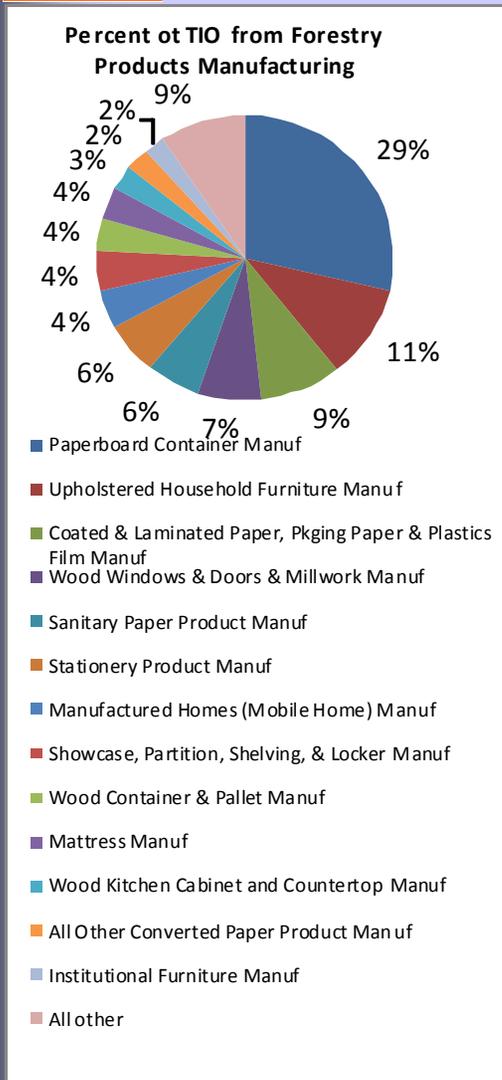


# Tennessee: Economic Impacts From Forest Products Manufacturing

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## Estimated Economic Impacts from Forest Products Manufacturing, 2011 (1,000 \$)

	TIO			Employment (Jobs)		
	Direct	Multiplier	Total	Direct	Multiplier	Total
Paperboard Container Manuf	\$1,930,704	1.48	\$2,856,741	5,054	2.38	12,023
Upholstered Household Furniture Manuf	\$719,448	1.52	\$1,090,046	3,954	1.72	6,784
Coated & Laminated Paper, Packaging Paper & Plastics Film Manuf	\$598,955	1.46	\$875,655	1,586	2.24	3,550
Wood Windows & Doors & Millwork Manuf	\$460,520	1.62	\$744,345	2,950	1.72	5,072
Sanitary Paper Product Manuf	\$399,870	1.37	\$547,670	540	2.87	1,548
Stationery Product Manuf	\$395,067	1.55	\$611,444	1,320	2.21	2,913
Manufactured Homes (Mobile Home) Manuf	\$302,727	1.89	\$571,249	1,963	2.02	3,972
Showcase, Partition, Shelving, & Locker Manuf	\$295,888	1.62	\$480,026	1,329	2.00	2,662
Wood Container & Pallet Manuf	\$254,293	1.60	\$407,527	2,181	1.53	3,346
Mattress Manuf	\$248,122	1.52	\$377,745	814	2.17	1,764
Wood Kitchen Cabinet and Countertop Manuf	\$181,404	1.86	\$336,811	1,450	1.85	2,679
All Other Converted Paper Product Manuf	\$168,062	1.56	\$262,926	583	2.19	1,276
Institutional Furniture Manuf	\$153,013	1.54	\$235,726	494	2.24	1,107
All Other Paper Bag & Coated & Treated Paper Manuf	\$134,832	1.47	\$197,767	446	2.04	910
Engineered Wood Member & Truss Manuf	\$102,217	1.54	\$157,046	537	1.78	959
All Other Miscellaneous Wood Product Manuf	\$93,799	1.71	\$160,173	595	1.87	1,114
Nonupholstered Wood Household Furniture Manuf	\$69,723	1.64	\$114,595	528	1.66	878
Reconstituted Wood Product Manuf	\$62,454	1.56	\$97,213	331	1.75	579
Wood Television, Radio, & Sewing Machine Cabinet Manuf	\$47,719	1.58	\$75,163	235	1.95	458
Prefabricated Wood Building Manuf	\$47,433	1.66	\$78,911	348	1.71	596
Office Furniture & Custom Architectural Woodwork & Millwork Manuf	\$42,959	1.74	\$74,732	314	1.79	563
Blind & Shade Manuf	\$22,928	1.70	\$39,044	165	1.70	281
Veneer & Plywood Manuf	\$7,525	1.43	\$10,782	35	1.70	60
<b>Total</b>	<b>\$6,739,661</b>		<b>\$10,403,339</b>	<b>27,752</b>		<b>55,094</b>

### Special points of interest:

- About 48% of the direct TIO from forest products manufacturing are derived from 4 industries: a) paperboard container manufacturing, b) upholstered furniture manufacturing, c) coated and laminated paper manufacturing, and d) wood windows, doors, & millwork.
- The largest employment is in paperboard container manufacturing (5,054), followed by upholstered furniture manufacturing (3,954), wood windows & doors & millwork manuf (2,950), and coated & laminated paper, packaging paper & plastics film manuf (1,586).



# Tennessee: Economic Impacts Trends: 2000-2011

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## Estimated Economic Impacts Trends for Tennessee, 2000-2011

	2011		2009		2006		2003		2000	
	Direct	Total								
<b>AGRO-FORESTRY</b>										
TIO	\$43,609	\$66,359	\$43,807	\$71,455	\$43,561	\$78,903	\$39,328	\$67,056	\$32,763	\$60,605
Employment	176,282	337,880	181,478	363,751	221,880	502,432	236,377	490,569	291,820	601,552
Wages and Salaries	\$5,693	\$13,110	\$5,778	\$14,053	\$7,091	\$18,767	\$6,371	\$15,858	\$5,937	\$14,465
Value-added	\$11,817	\$23,494	\$12,444	\$26,486	\$12,801	\$31,958	\$12,205	\$27,765	\$10,193	\$25,359
<b>AGRICULTURE</b>										
TIO	\$31,061	\$46,712	\$30,975	\$50,443	\$28,201	\$51,476	\$26,269	\$44,232	\$20,799	\$38,855
Employment	136,815	246,885	139,355	261,803	161,983	346,903	177,461	341,738	214,426	417,255
Wages and Salaries	\$3,210	\$8,190	\$3,293	\$8,889	\$3,753	\$11,453	\$3,572	\$9,685	\$3,367	\$8,841
Value-added	\$8,017	\$15,935	\$8,270	\$17,831	\$7,520	\$20,098	\$8,086	\$18,131	\$6,051	\$15,762
<b>FORESTRY</b>										
TIO	\$12,548	\$19,647	\$12,832	\$21,012	\$15,360	\$27,427	\$13,059	\$22,824	\$11,964	\$21,750
Employment	39,467	90,995	42,123	101,768	59,897	155,529	58,916	148,831	77,394	184,297
Wages and Salaries	\$2,483	\$4,920	\$2,485	\$5,164	\$3,339	\$7,313	\$2,799	\$6,173	\$2,571	\$5,624
Value-added	\$3,800	\$7,559	\$4,174	\$8,655	\$5,282	\$11,860	\$4,119	\$9,634	\$4,142	\$9,597
<b>FOOD, FIBER, &amp; FORRETT PRODUCTS MANUFACTURING</b>										
TIO	\$32,364	\$48,797	\$32,908	\$53,748	\$32,272	\$58,890	\$29,207	\$58,898	\$24,214	\$44,330
Employment	78,218	188,113	81,642	211,907	103,930	309,479	110,945	342,979	137,463	351,062
Wages and Salaries	\$4,211	\$9,641	\$4,339	\$10,523	\$5,291	\$14,168	\$4,865	\$14,233	\$4,591	\$10,824
Value-added	\$8,259	\$16,766	\$8,743	\$19,212	\$8,915	\$23,442	\$8,547	\$23,997	\$7,453	\$18,417
<b>TOTAL ECONOMY</b>										
TIO	\$499,904		\$485,506		\$487,492		\$388,211		\$330,218	
Employment	3,517,918		3,523,366		3,624,042		3,418,311		3,519,482	
Wages and Salaries	\$169,529		\$158,472		\$155,423		\$131,075		\$116,586	
Value-added	\$259,435		\$253,043		\$244,215		\$202,825		\$175,945	
<b>PERCENT OF TOTAL ECONOMY</b>										
TIO	8.7%	13.3%	9.0%	14.7%	8.9%	16.2%	10.1%	17.3%	9.9%	18.4%
Employment	5.0%	9.6%	5.2%	10.3%	6.1%	13.9%	6.9%	14.4%	8.3%	17.1%
Wages and Salaries	3.4%	7.7%	3.6%	8.9%	4.6%	12.1%	4.9%	12.1%	5.1%	12.4%
Value-added	4.6%	9.1%	4.9%	10.5%	5.2%	13.1%	6.0%	13.7%	5.8%	14.4%