



NAICs, SOCs, CACTs and COEs

**California Community College
Association for Occupational Education
Spring 2011 Conference**

March 24, 2011



C A C T

Centers for Applied Competitive Technologies
MAKING IT IN CALIFORNIA



C·O·E

CENTERS OF EXCELLENCE
Inform Connect Advance

Today's Presentation

About the COE
About the CACT

Key Research Findings

Aerospace

Biotechnology

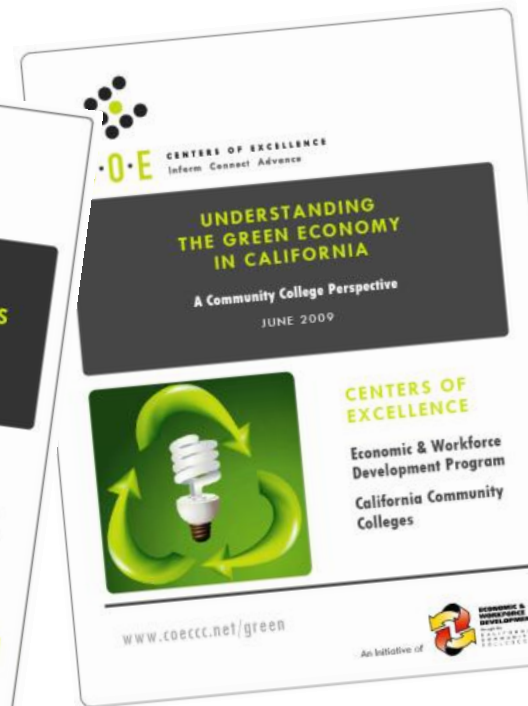
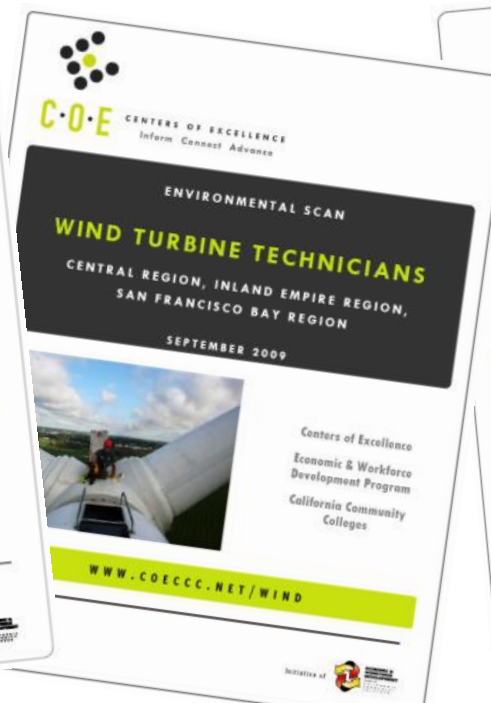
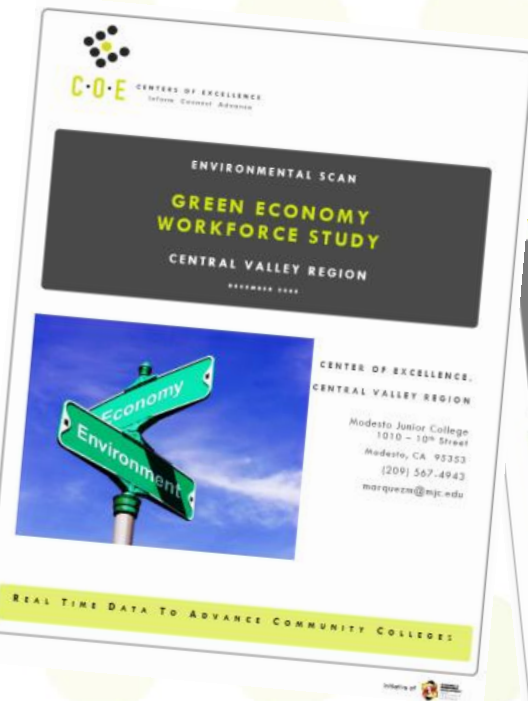
Food Processing

Print and Publishing



Centers of Excellence

The COE, in partnership with business and industry, delivers regional workforce research customized for community college and workforce system decision making and resource development.



Centers for Applied Competitive Technologies

The CACTs offer technology education, manufacturing training, and consulting services that contribute to continuous workforce development, technology deployment and business development.

Their services include:

- Customized workforce training in areas such as just-in-time production, distribution cycles, and six sigma deployment.
- Consulting services in areas such as organization assessment, quality system audits, process capability, and strategic planning.
- Technical services that provide an unbiased professional evaluation of your advanced technology processes.

Research Purpose: Facilitate Program Development

- Assess and map the workforce and economic trends for four manufacturing sectors on a statewide and regional basis.
- Identify current job trends, short-term job projections, fastest growing occupations, wages and revenue.

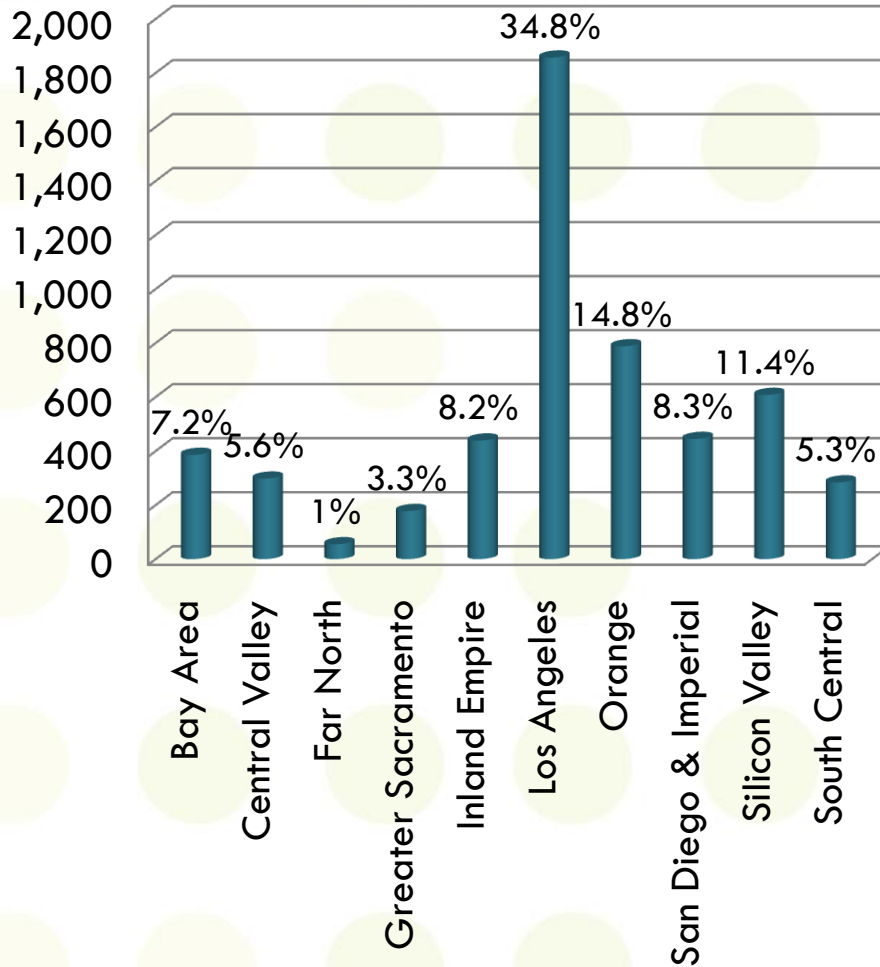
Aerospace Manufacturing



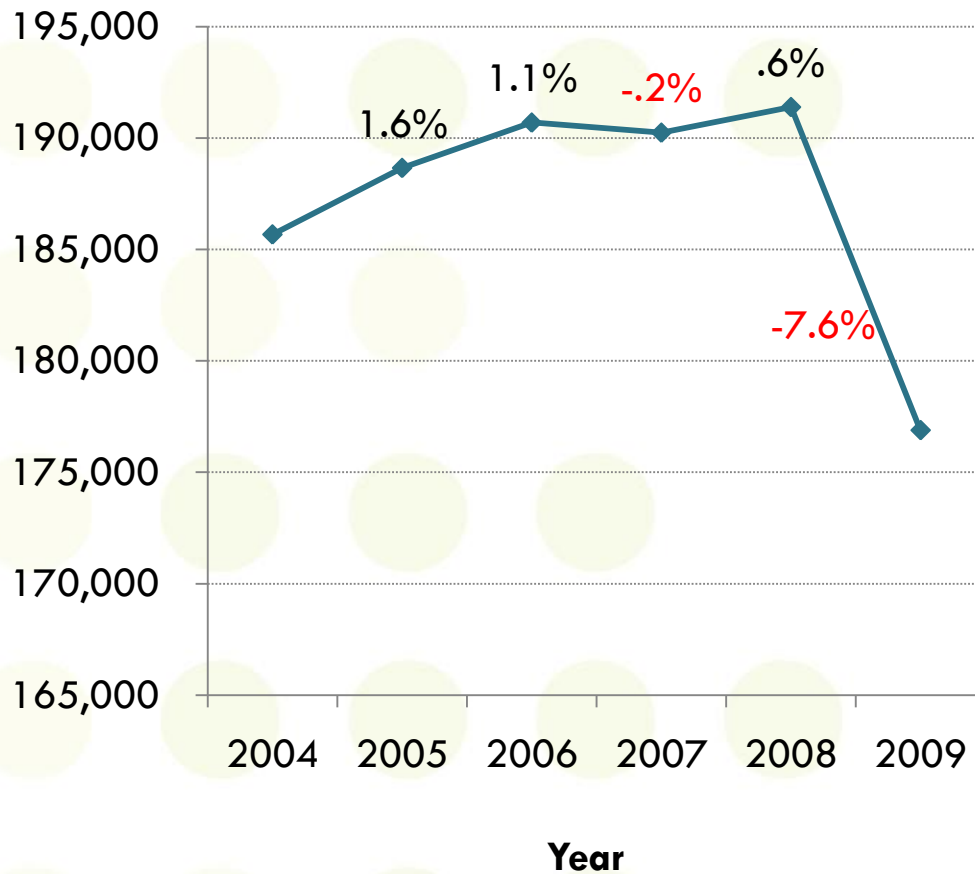
Aerospace: Industry Size

Industry Group	2009 Jobs	% of Total	# of Firms	% of Total
Aircraft Manufacturing	22,644	13%	223	4%
Aircraft Engines & Engine Parts	3,561	2%	78	1%
Other Aircraft Parts & Equipment	25,152	14%	466	9%
Aircraft Support	64,865	37%	4,069	76%
Missiles, Space Vehicles & Parts	18,006	10%	174	3%
Search, Detection & Navigation Instruments	42,717	24%	343	6%
Total	176,894	100%	5,338	100%

Aerospace: Firms by Region

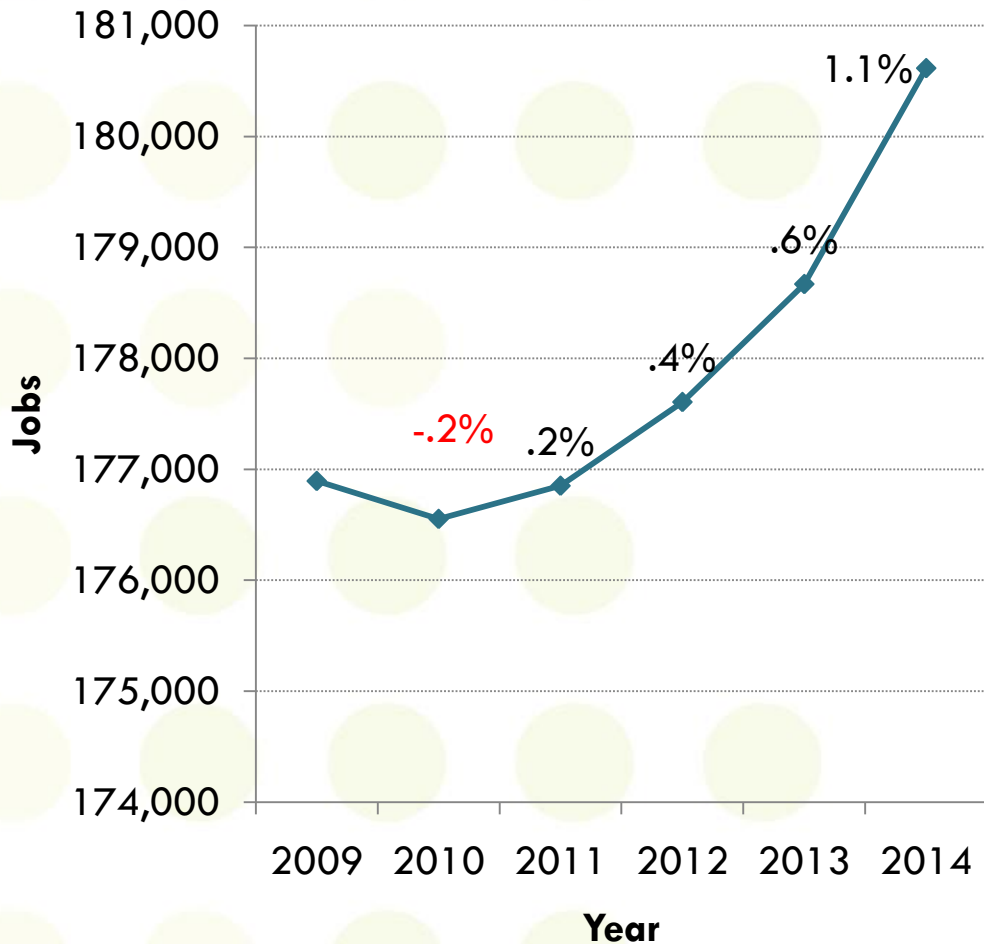


Aerospace: Recent Job Trends



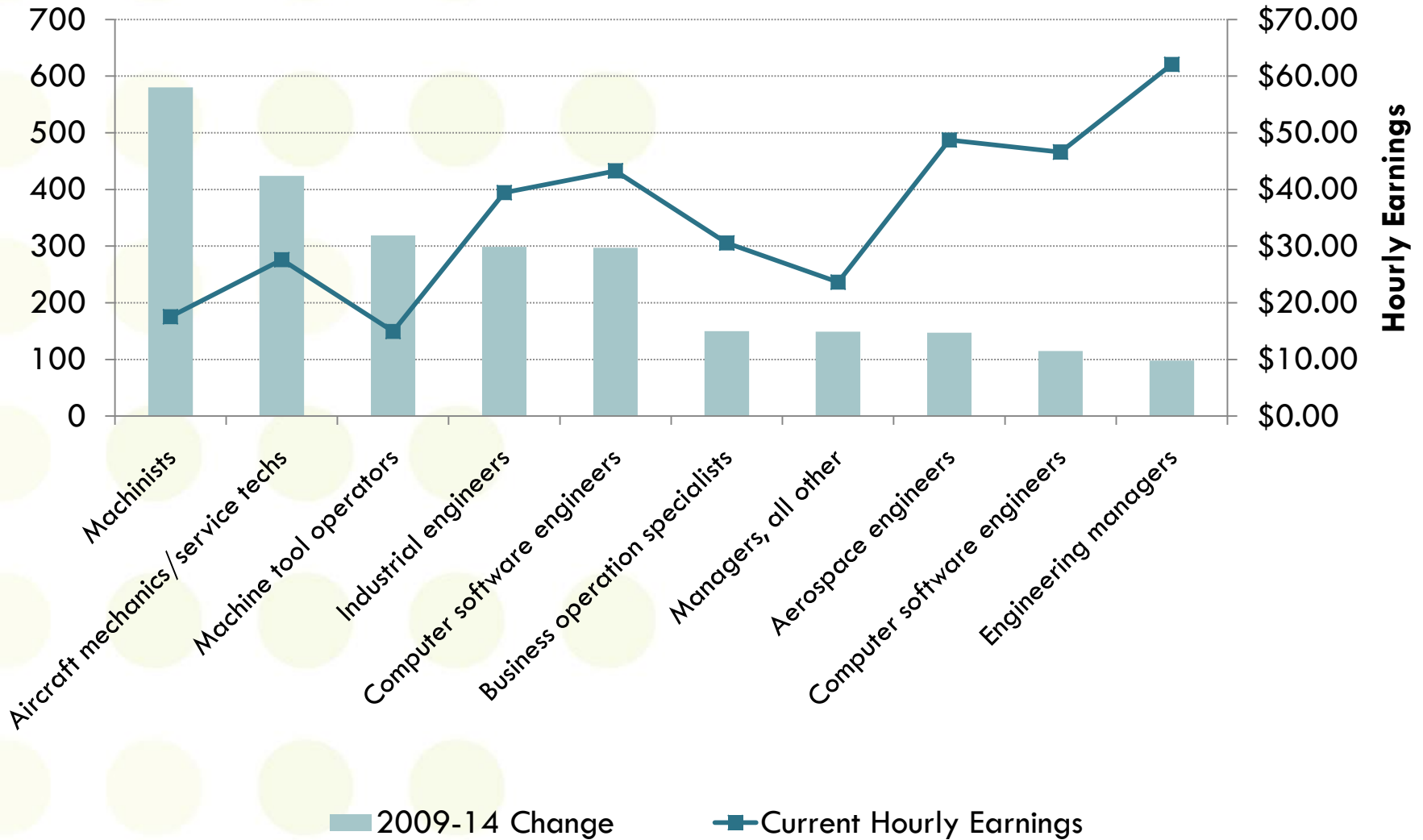
Region	04-09 Change	% Change
Bay Area	113	1.9%
Central Valley	198	4.2%
Far North	120	15.1%
Greater Sac	573	16.5%
Inland Empire	(1,218)	-15.1%
Los Angeles	(7,339)	-8.0%
Orange	(2,846)	-8.9%
San Diego & Imperial	3,018	24.5%
Silicon Valley	(1,831)	-9.3%
South Central	429	6.3%
California	(8,783)	-4.7%

Aerospace: Five Year Projections



Region	09-14 Change	% Change
Bay Area	414	7%
Central Valley	487	10.0%
Far North	104	11.4%
Greater Sac	936	23.2%
Inland Empire	403	5.9%
Los Angeles	-3,289	-3.9%
Orange	1,549	5.3%
San Diego & Imperial	1,632	10.6%
Silicon Valley	909	5.1%
South Central	576	8.0%
California	3,721	2.1%

Top 10 Fastest Growing Occupations



Aerospace: Industry Summary

Aerospace manufacturing will continue to thrive in

California:

- A strong supplier presence
- World-class higher education system that provides a pipeline of highly trained workers
- More NASA centers than any other state
- Access to research and development centers

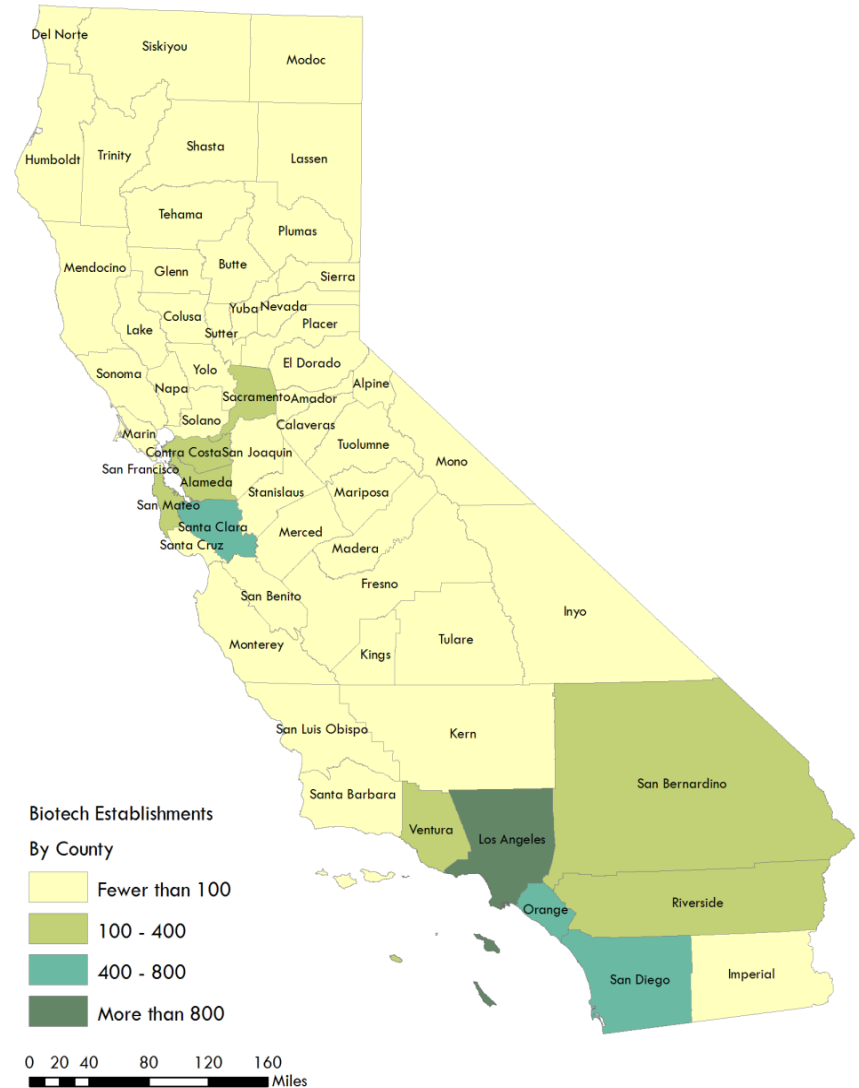
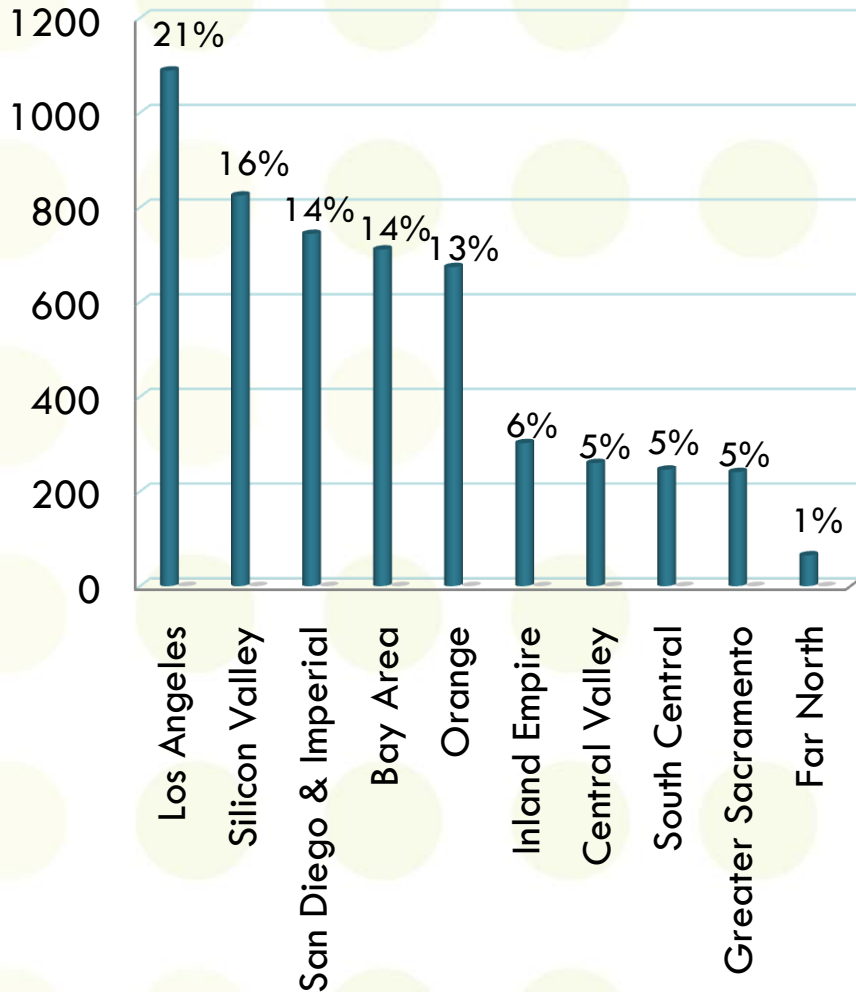
Biotechnology, Medical Devices & Pharmaceutical Manufacturing



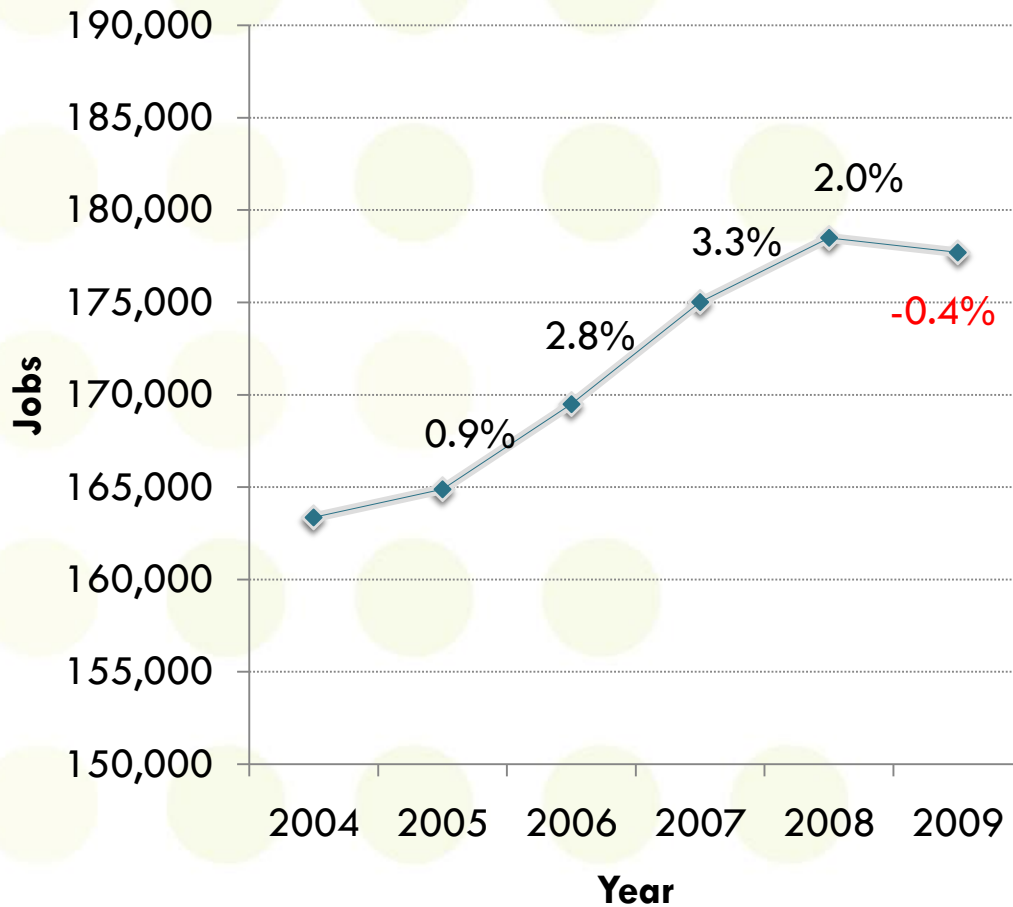
Biotech: Industry Size

Industry Group	2009 Firms	% of Total Firms	2009 Jobs	% of Total Jobs
Biotechnology	3,374	65%	75,492	42%
Medical Devices, Equipment and Supplies	1,241	24%	58,194	33%
Pharmaceuticals and Related Manufacturing	555	11%	44,007	25%
Total	5,170	100%	177,693	100%

Biotech: Firms by Region

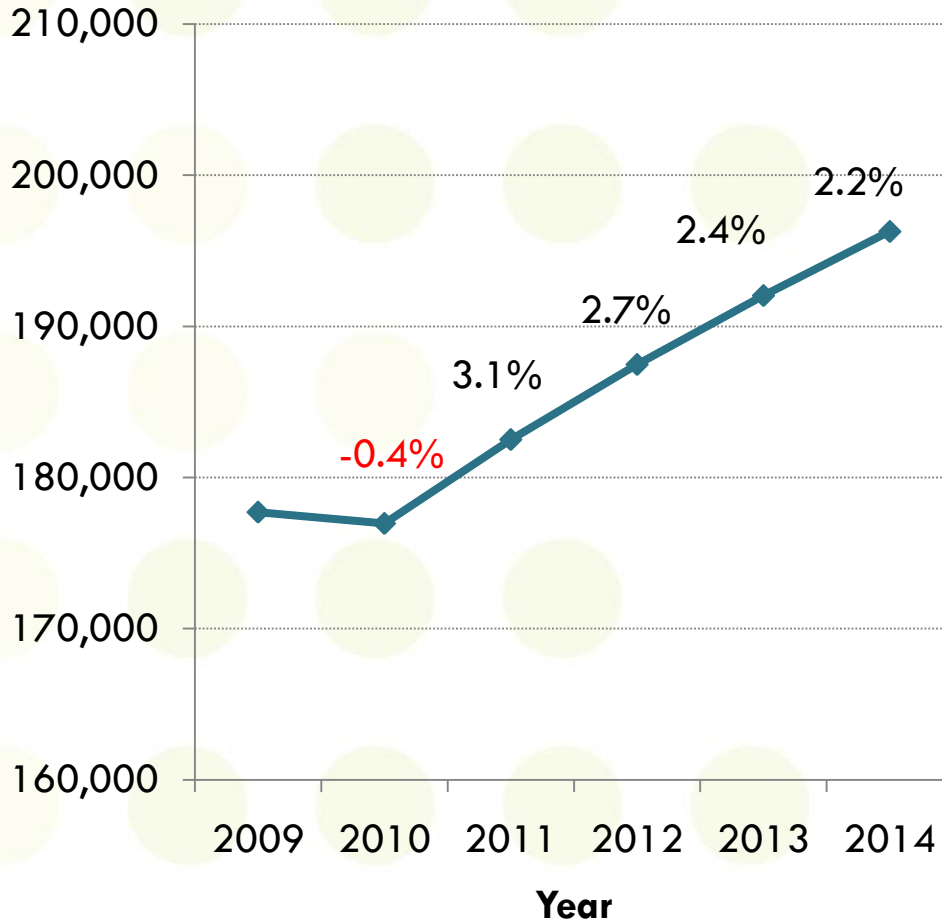


Biotech: Recent Job Trends



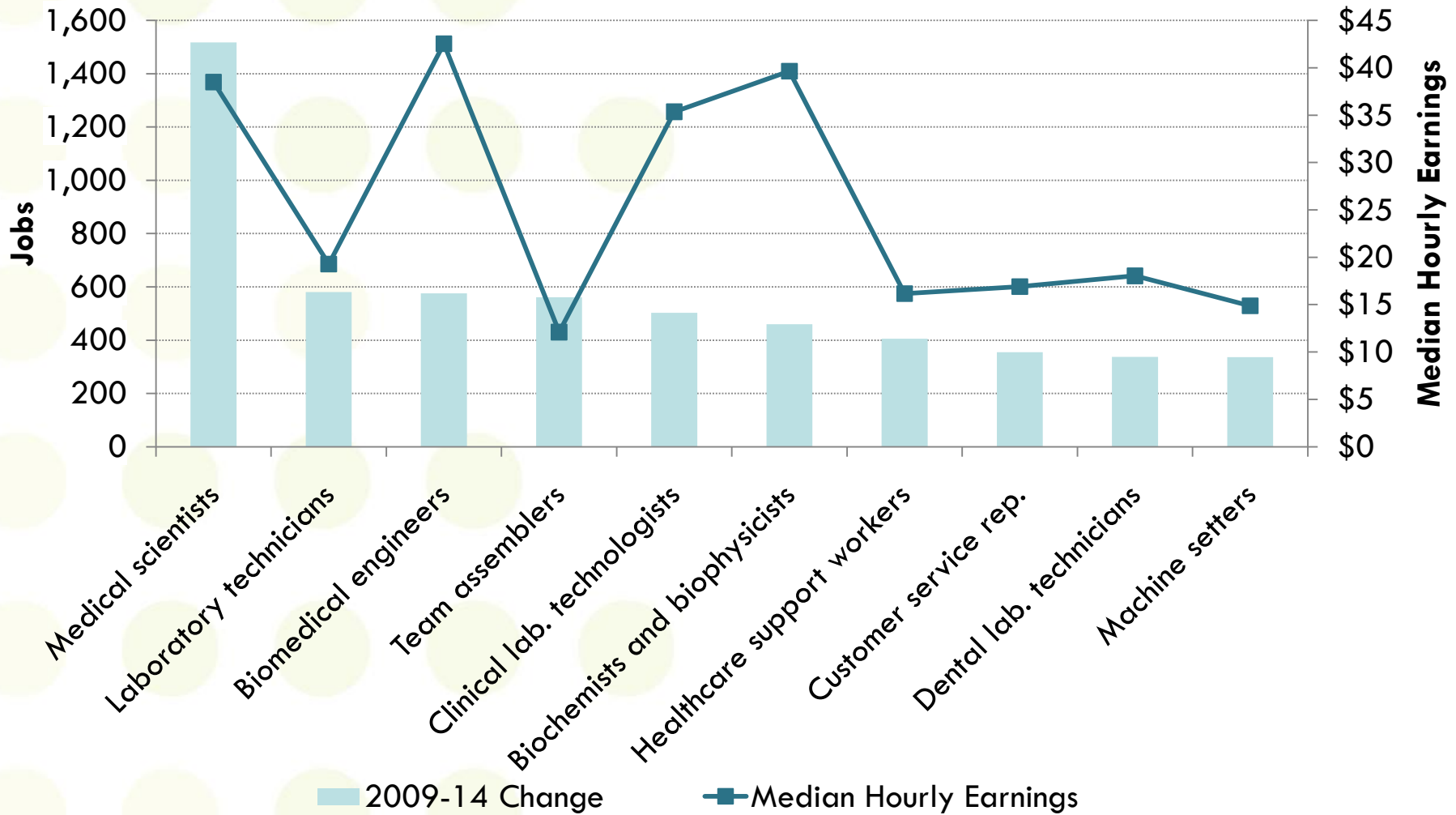
Region	04-09 Job Change	% Change
San Diego & Imperial	6,309	29.6%
Orange	2,852	12.7%
Los Angeles	2,476	7.7%
Inland Empire	1,214	14.7%
Silicon Valley	886	2.5%
Bay Area	691	3.0%
Central Valley	661	18.8%
Greater Sac	542	13.0%
Far North	(164)	-22.3%
South Central	(1,118)	-9.1%
California	14,349	8.8%

Biotech: Five Year Projections



Region	09-14 Change	% Change
San Diego & Imperial	4,346	15.70%
Silicon Valley	4,104	11.20%
Bay Area	2,874	12.20%
Los Angeles	2,188	6.30%
Orange	2,172	8.60%
Inland Empire	1,186	12.50%
Greater Sac	680	14.40%
South Central	524	4.70%
Central Valley	464	11.10%
Far North	33	5.80%
California	18,571	10.5%

Top 10 Fastest Growing Occupations



Biotech: Industry Summary

Biotech manufacturing is gaining market share:

- Educated and trained workforce. California has the highest number of higher education degrees in the biosciences in the nation.
- Substantial flow of capital investments and funding: \$23 billion of investments between 2004 to 2009.
- Pursuit of a healthier and better lifestyle. As the baby boomer generation ages, the demand for products that extend life and foster a healthier lifestyle continue to increase.

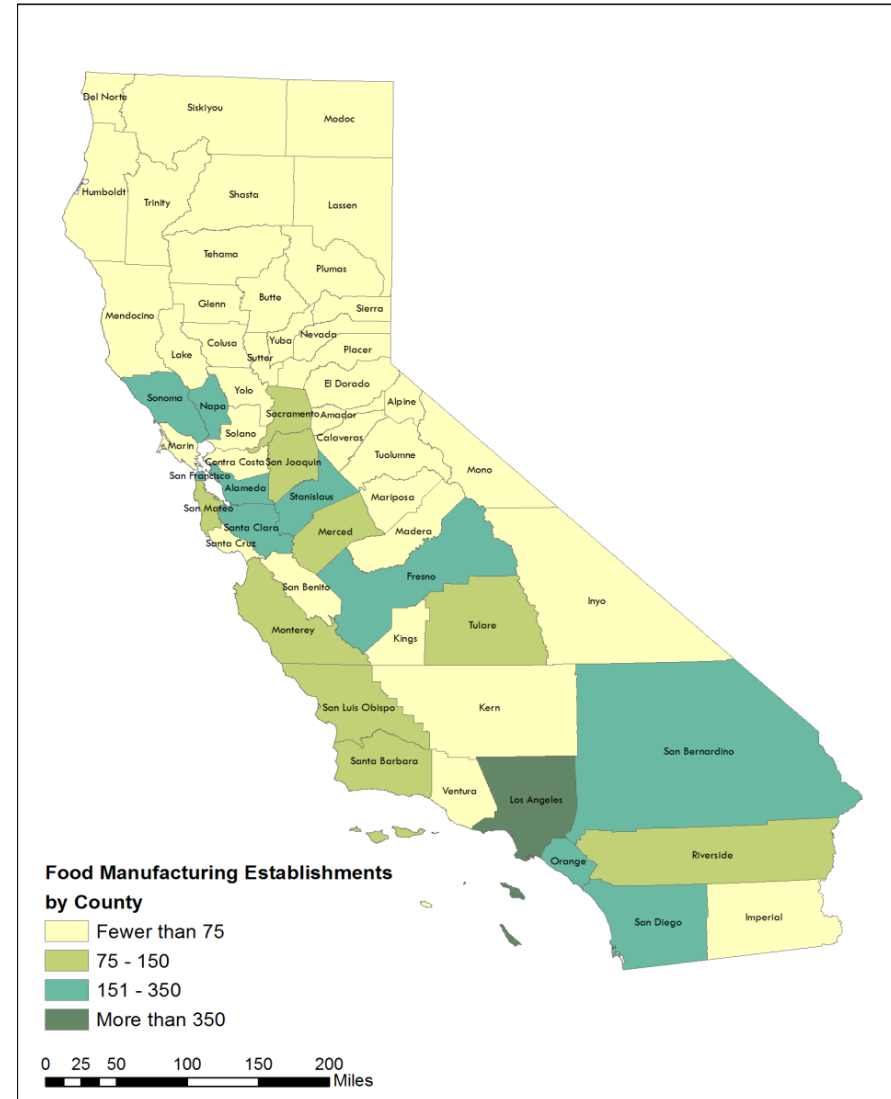
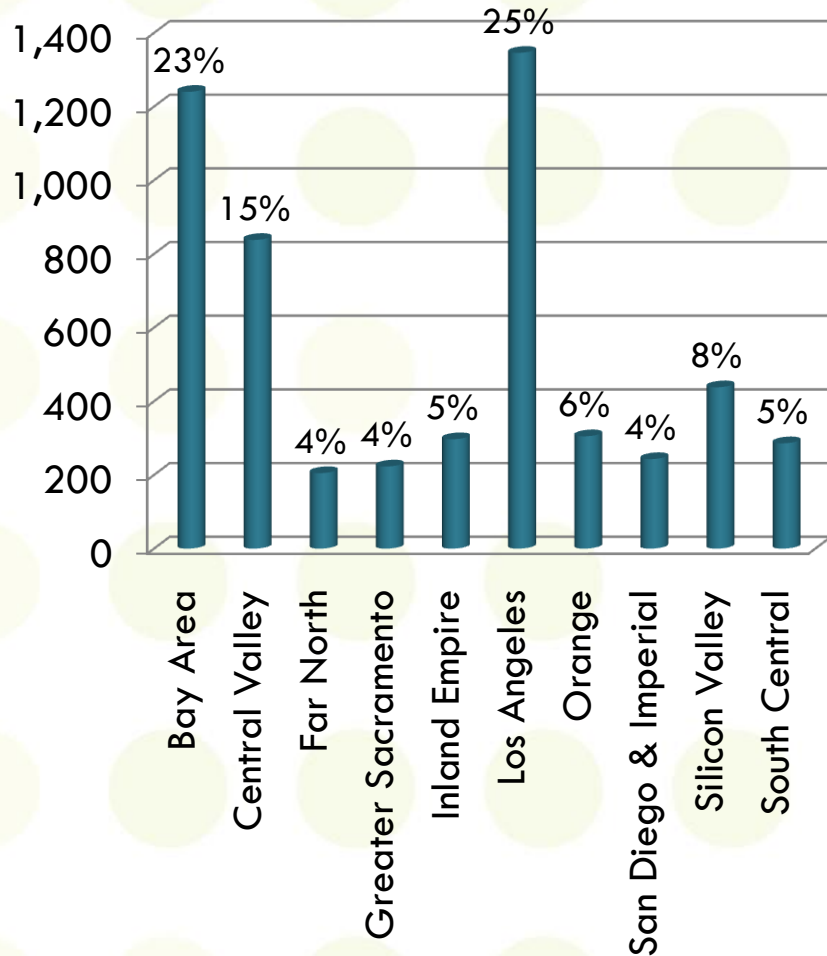
Food Manufacturing



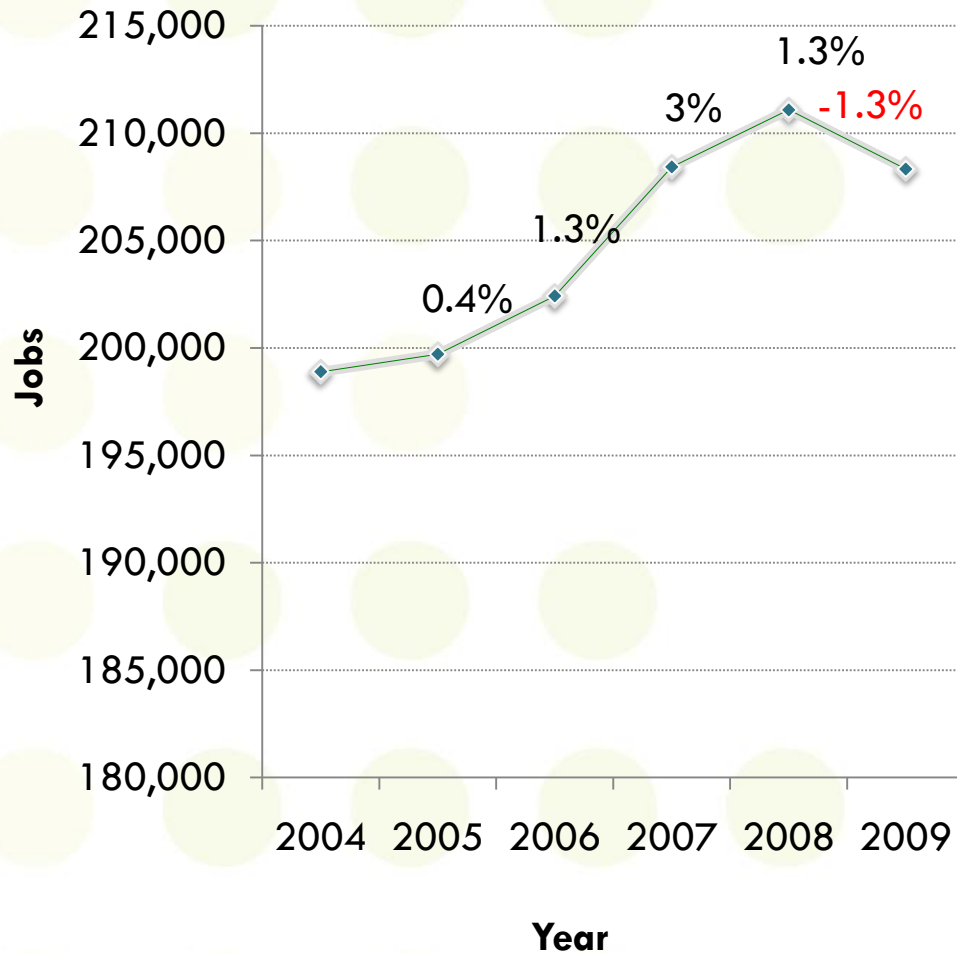
Food: Industry Size

Industry Group	2008 Firms	% of CA 2008 Firms	2009 Jobs	% of CA 2009 Jobs
Bakeries & Tortilla Mfg.	1,776	33%	40,931	20%
Beverage Product Mfg.	1,485	27%	47,915	23%
Other Food Mfg.	549	10%	25,825	12%
Fruit & Vegetable/Specialty Foods	419	8%	36,930	18%
Animal Slaughtering & Processing	358	7%	21,139	10%
Dairy Product Mfg.	284	5%	17,200	8%
Sugar & Confectionary Product Mfg.	222	4%	7,359	4%
Animal Food Mfg.	173	3%	4,777	2%
Grain and Oilseed Milling	97	2%	4,683	2%
Seafood Preparation & Packaging	56	1%	1,573	1%
Total	5,419	100%	208,332	100%

Food: Firms by Region



Food: Recent Job Trends



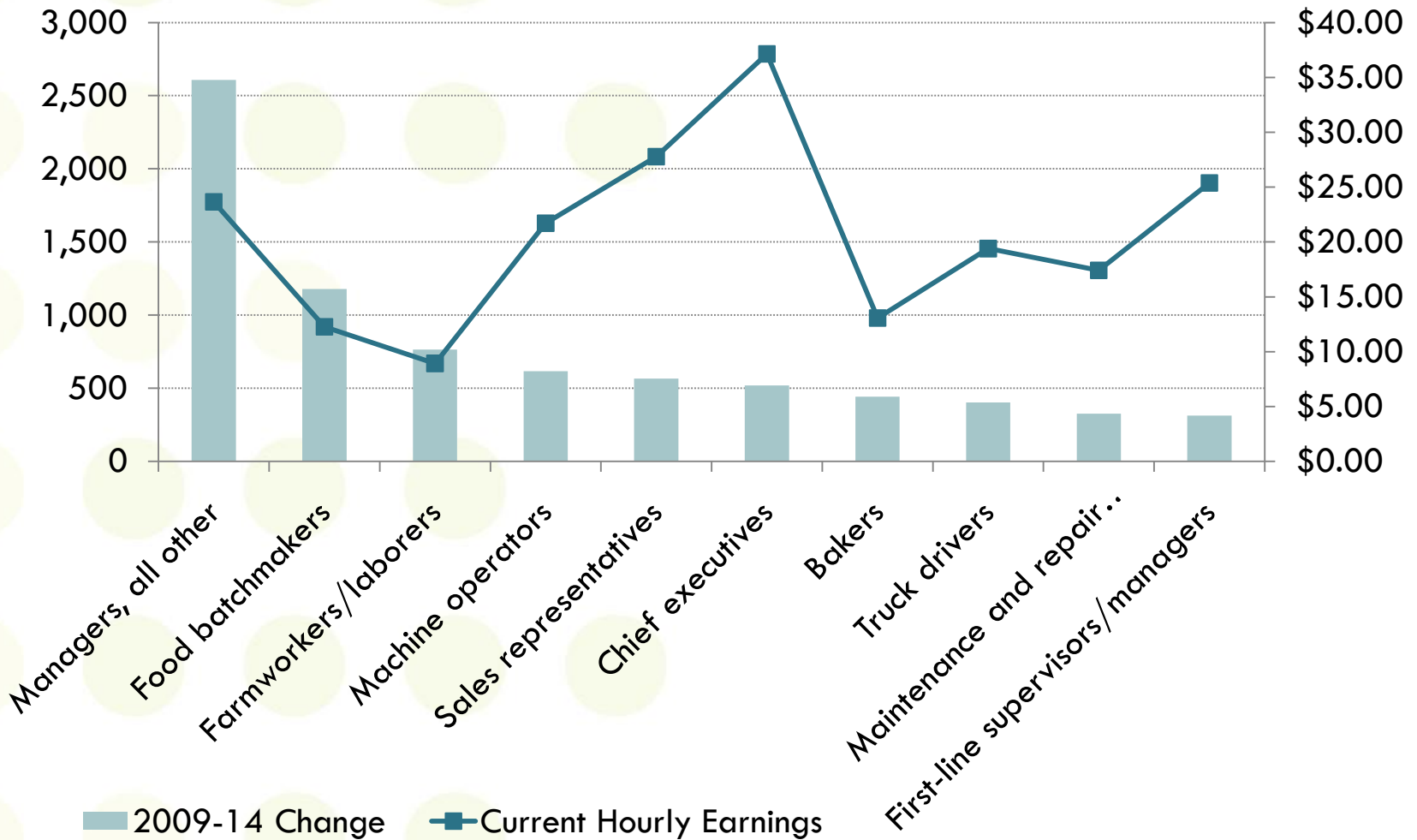
Region	04-09 Change	% Change
Central Valley	4,256	7.7%
Bay Area	1,912	5.5%
Inland Empire	1,607	16.7%
South Central	1,542	31.0%
Far North	708	14.0%
San Diego & Imperial	533	6.8%
Orange	506	5.7%
Silicon Valley	202	1.4%
Greater Sac	(115)	-1.4%
Los Angeles	(1,712)	-3.4%
California	9,439	4.7%

Food: Five Year Projections



Region	09-14 Change	% Change
Central Valley	4,671	7.8%
Bay Area	2,759	7.6%
Inland Empire	1,278	11.4%
San Diego & Imperial	1213	14.5%
South Central	798	12.2%
Los Angeles	461	1.0%
Silicon Valley	401	2.8%
Greater Sac	201	2.4%
Far North	99	1.7%
Orange	-149	-1.6%
California	11,732	5.6%

Top 10 Fastest Growing Occupations



Food: Industry Summary

Food manufacturing is a stable and growing industry sector in California:

- Food is a necessity.
- Food is easy to grow in California: Abundance of fertile land, a suitable climate and an expansive infrastructure (highways, airports, & ports).
- Demand for food exports is high. California is the largest food exporter in the nation.

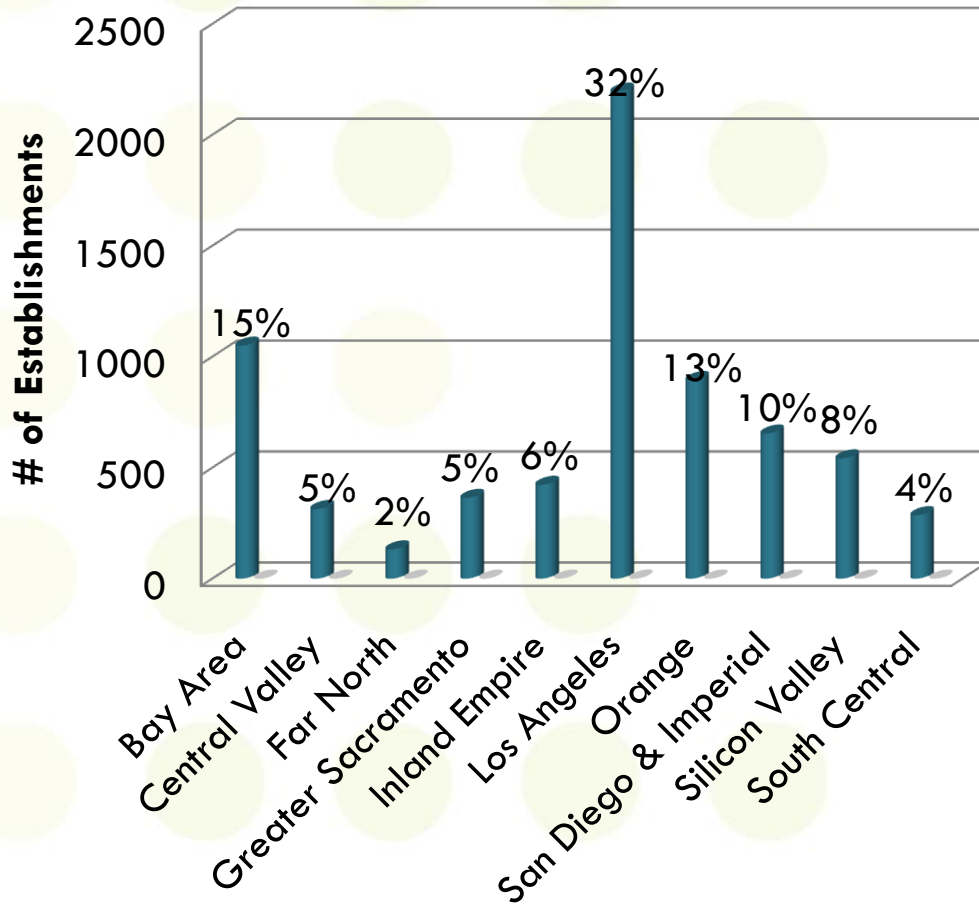
Printing and Publishing



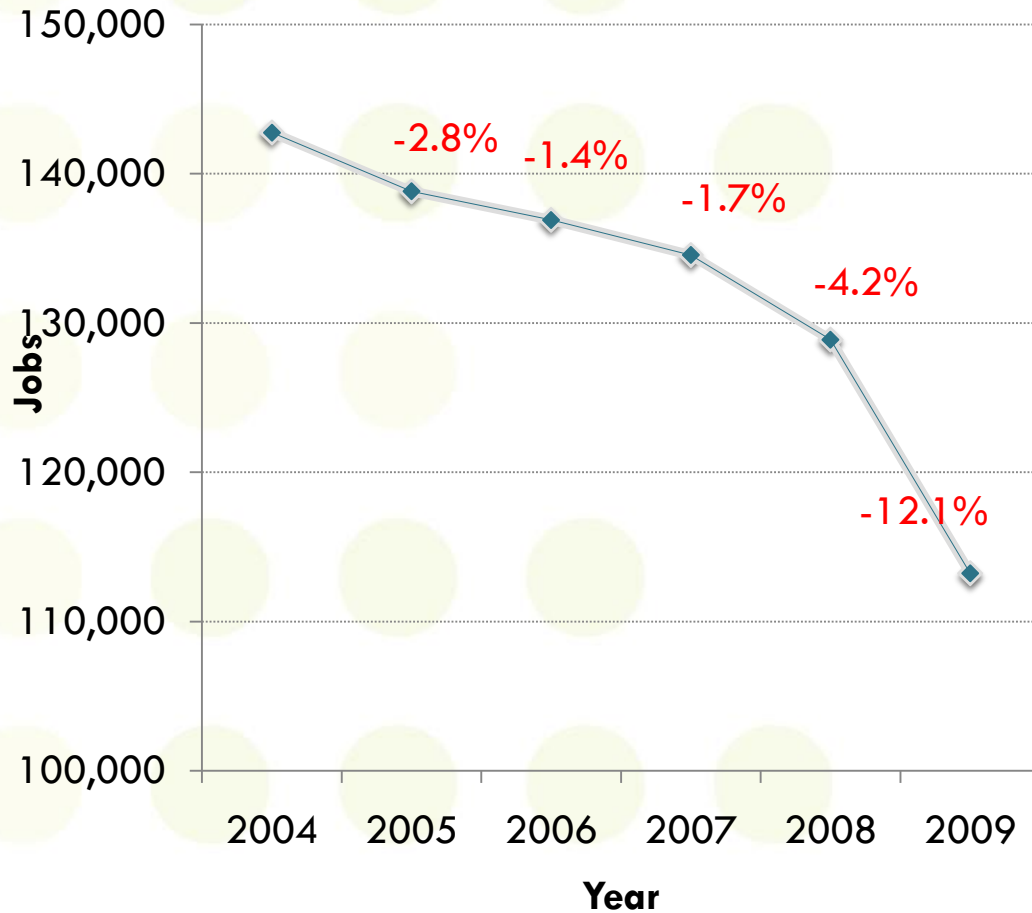
Print: Industry Size

Industry Group	2009 Jobs	Jobs % of Total	Firms	Firms % of Total
Printing	53,619	47%	3,809	56%
Support Activities for Printing	4,845	4%	318	5%
Publishing (Except Internet)	54,785	48%	2,734	40%
Total	113,249	100%	6,861	100%

Print: Firms by Region

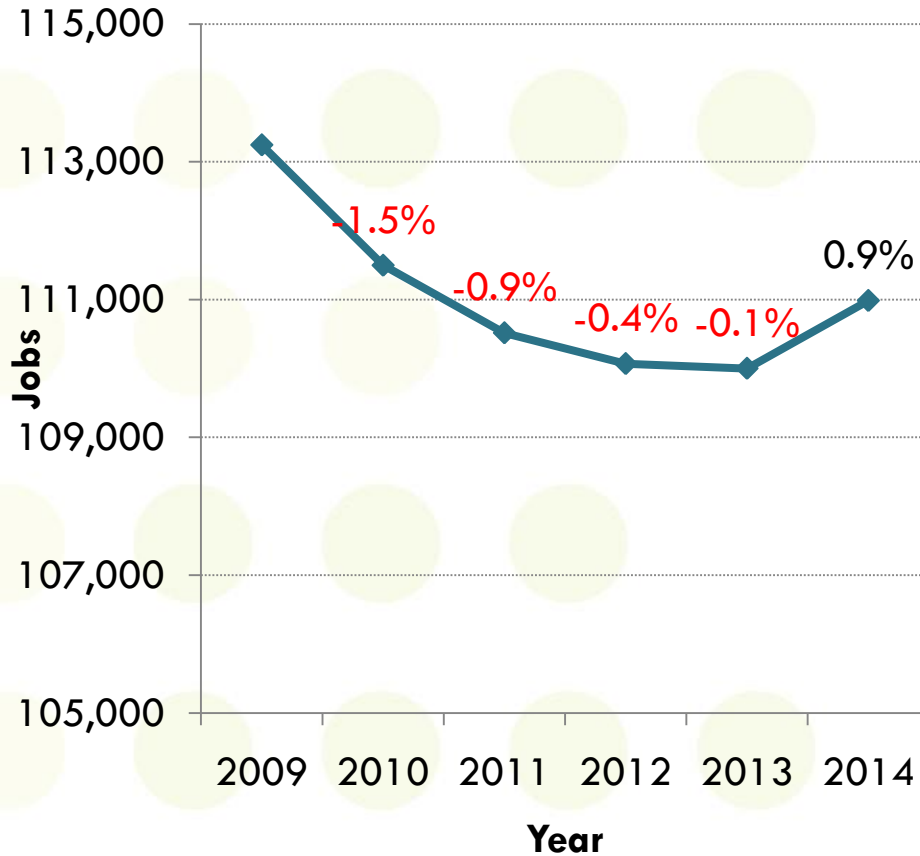


Print: Recent Job Trends



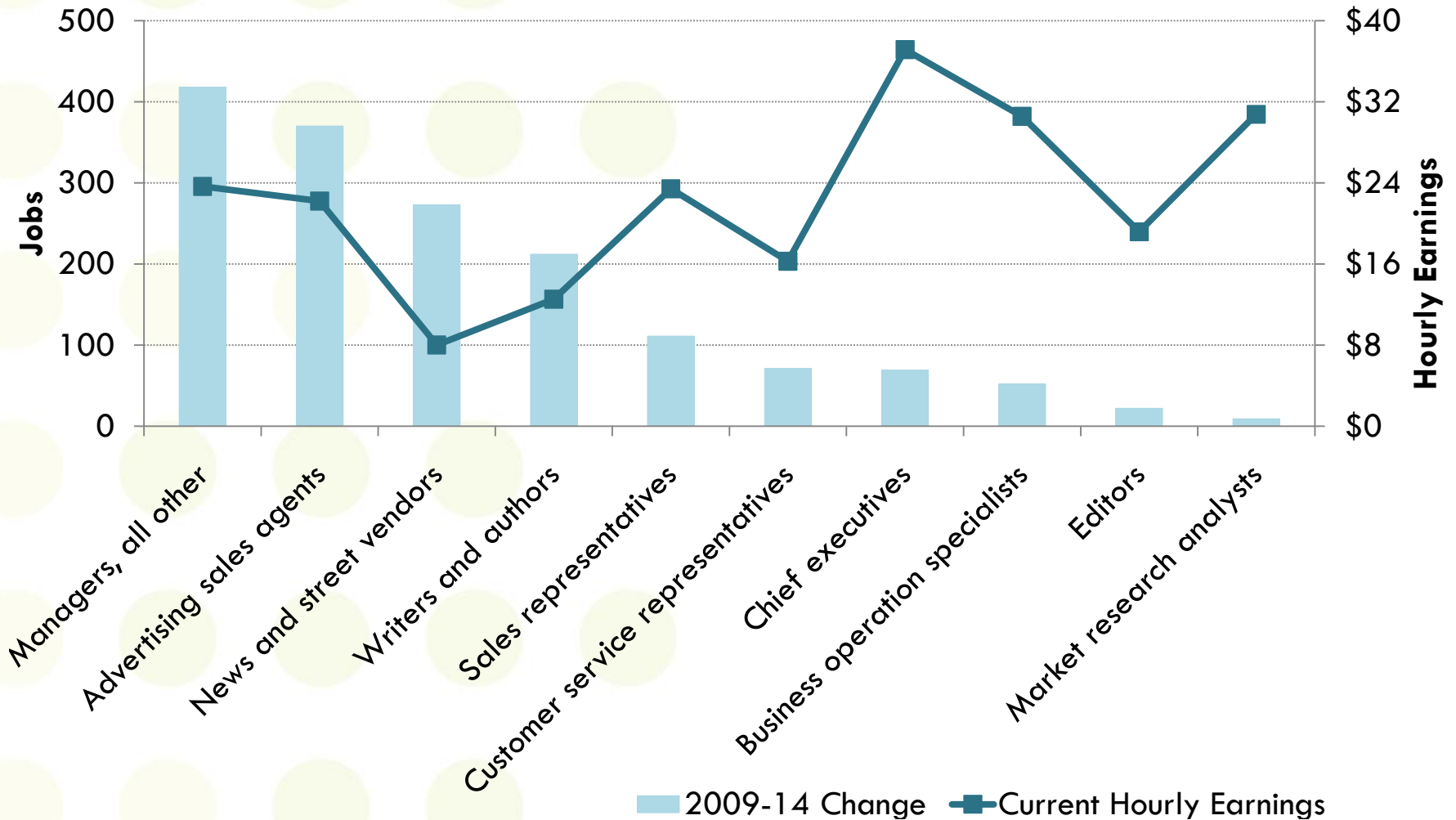
Region	04-09 Change	% Change
Bay Area	(4,802)	-22.1%
Central Valley	(2,254)	-25.5%
Far North	(269)	-10.9%
Greater Sac	(1,547)	-21.3%
Inland Empire	(2,024)	-23.3%
Los Angeles	(8,820)	-19.6%
Orange	(2,482)	-14.0%
San Diego & Imperial	(3,328)	-24.6%
Silicon Valley	(2,935)	-25.8%
South Central	(1,017)	-17.0%
California	(29,478)	-20.7%

Print: Five Year Projections



Region	09-14 Change	% Change
Bay Area	-993	-5.9%
Central Valley	-36	-0.5%
Far North	267	12.2%
Greater	163	2.9%
Inland Empire	399	6.0%
Los Angeles	-485	-1.3%
Orange	229	1.5%
San Diego & Imperial	-325	-3.2%
Silicon Valley	-1578	-18.7%
South Central	98	2.0%
California	-2261	-2.0%

Top 10 Fastest Growing Occupations



Print: Industry Summary

The printing industry is declining, but will begin to stabilize in the next five years:

- The internet remains a strong competitor of print & publishing sector.
- Information technology has modernized the business environment, automating basic processes that previously required paper forms.
- Consumer demographics are changing. Mobile devices are more prevalent in younger generations.

How to use this research

CACTS:

- Determine if the CACTS are strategically located to meet industry needs.

CACTS and Colleges:

- Access data for grant writing.
- Identify if there are industries in your region that are not being served.
- Identify potential training gaps.
- Provide career counselors industry updates.
 - What are the occupations in these industries? Are the occupations growing or shrinking? What are the wages? Where are the training programs?

Thank You!

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