

Yakima County Economic Update

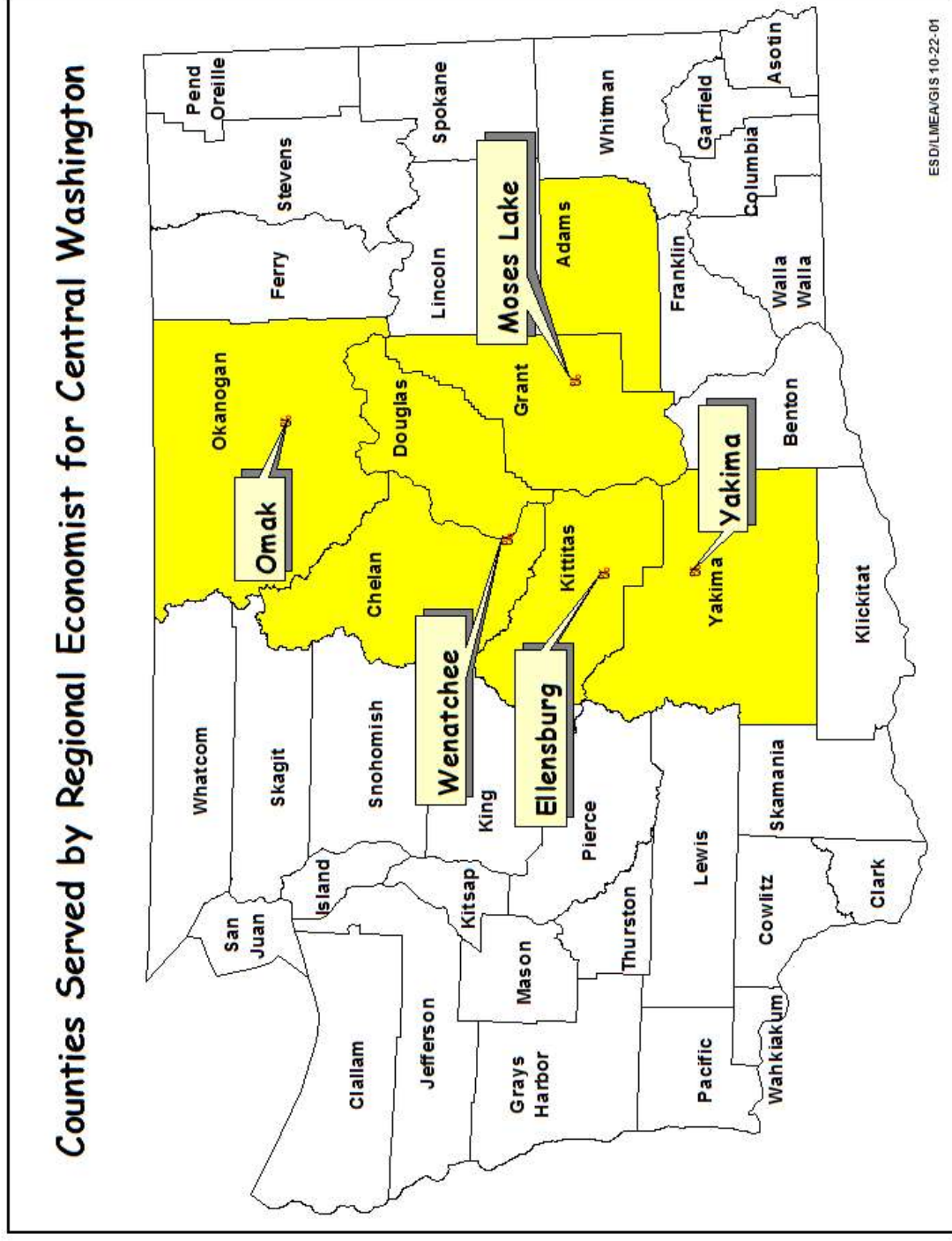
For: Board of Yakima County Commissioners,
Yakima, WA

Donald W. Meseck, Regional Labor Economist, Data
Architecture, Transformation, and Analytics (DATA),
Employment Security Department (ESD)

July 18, 2023



My Area of Responsibility: Adams, Chelan, Douglas, Grant, Kittitas, Okanogan, and Yakima counties



Today's presentation focuses on the Yakima County labor economy.

Average annual covered employment and wage trends from 2012-2022 – using Quarterly Census Employment and Wage (QCEW) data

- Slides 4-18

Average annual and monthly nonfarm employment trends from 2010-2022, from 2019-2022, and through May 2023 – using Current Employment Statistics (CES) data

- Slides 19-31

Average annual Civilian Labor Force (CLF) and unemployment rates from 2010-2022, and up through May 2023 – using Local Area Unemployment Statistics (LAUS) data

- Slides 32-37

Website and Point of Contact (POC) information

- Slide 38

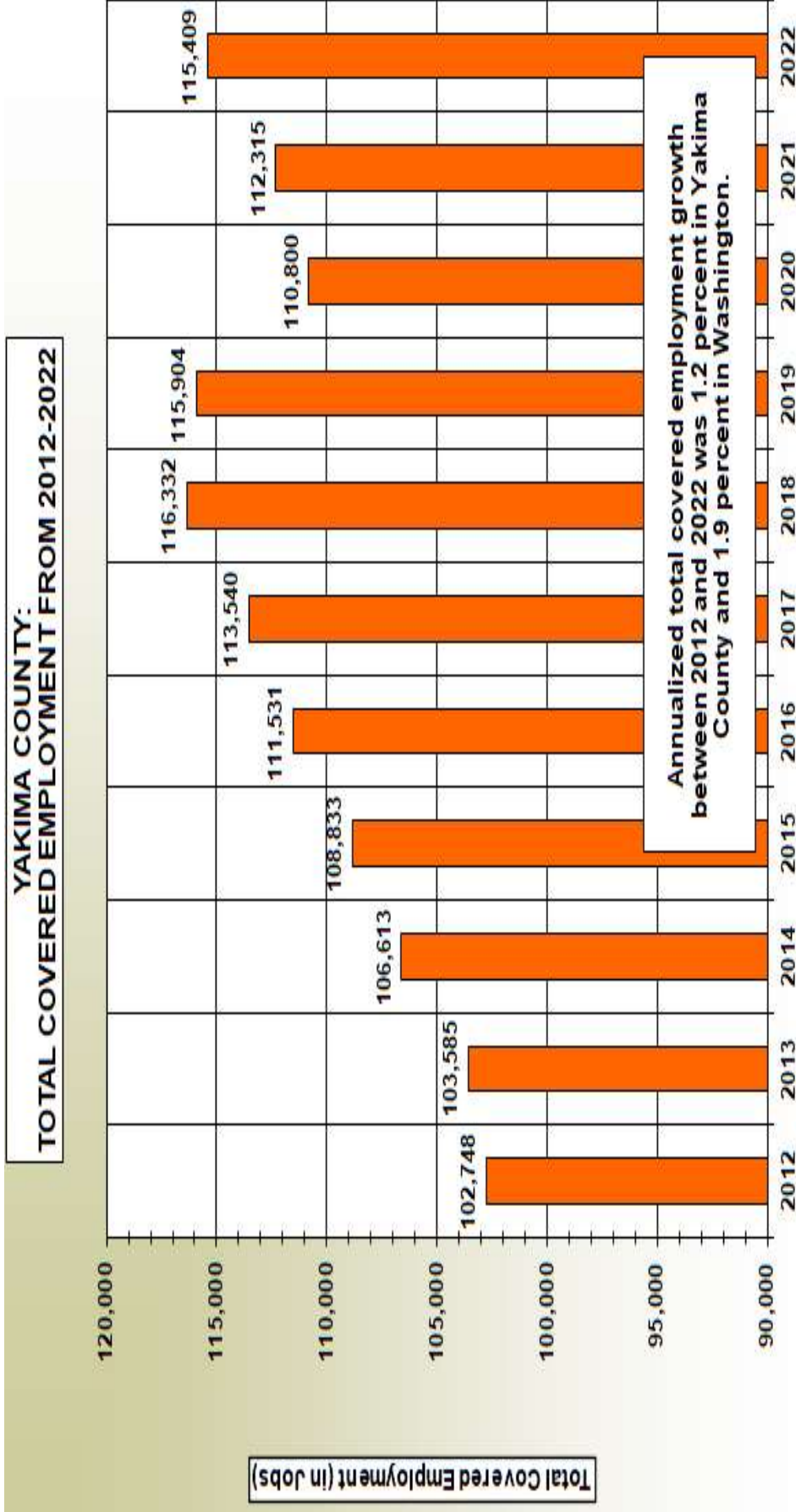
Analyzed county-level QCEW data for 22 North American Industry Classification System (NAICS) sectors

19 private-industry sectors	
NAICS 11	(Agriculture, forestry and fishing)
NAICS 21	(Mining)
NAICS 22	(Utilities)
NAICS 23	(Construction)
NAICS 31-33	(Manufacturing)
NAICS 42	(Wholesale trade)
NAICS 44-45	(Retail trade)
NAICS 48-49	(Transportation and warehousing)
NAICS 51	(Information)
NAICS 52	(Finance and insurance)
NAICS 53	(Real estate and rentals)
NAICS 54	(Professional and business services)
NAICS 55	(Management of companies)
NAICS 56	(Administrative and waste services)
NAICS 61	(Private education services)
NAICS 62	(Health services)
NAICS 71	(Arts, entertainment and recreation)
NAICS 72	(Accommodation and food services)
NAICS 81	(Other services)

Three government sectors	
Federal government	
State government	
Local government	
* North American Industry Classification System (NAICS)	

QCEW is the Quarterly Census of Employment and Wages, a U.S. Bureau of Labor Statistics data set.

From 2012-2022, covered employment rose 12.3 percent (declining -4.4 percent in 2020 before rising 1.4 percent in 2021 and 2.8 percent in 2022).



Source: QCEW Data

Health services (NAICS 62) and agriculture (NAICS 11) accounted for over half (53.5 percent) of the 12,661 covered jobs added from 2012-2022.

COVERED EMPLOYMENT BY INDUSTRY SECTOR IN YAKIMA COUNTY FROM 2012-2022				
Sorted by Changes (in # of Jobs) From 2011-2021 (As of 20 June 2023)				
INDUSTRY	2012	2022	Job Changes (in #) From 2012-2022	Job Changes (in %) From 2012-2022
NAICS 62 (Health Services)	12,837	17,446	4,609	35.9%
NAICS 11 (Agriculture, Forestry, and Fishing)	27,029	29,199	2,170	8.0%
NAICS 72 (Accommodation and Food Services)	5,550	7,115	1,565	28.2%
NAICS 23 (Construction)	2,588	4,094	1,506	58.2%
NAICS 44-45 (Retail Trade)	10,045	11,267	1,222	12.2%
Local Government	12,937	14,067	1,130	8.7%
NAICS 48-49 (Transportation and Warehousing)	2,899	3,797	898	31.0%
NAICS 31-33 (Manufacturing)	7,813	8,356	543	6.9%
NAICS 42 (Wholesale Trade)	3,980	4,508	528	13.3%
NAICS 56 (Administrative and Waste Services)	1,650	2,073	423	25.6%
NAICS 61 (Private Education Services)	918	1,189	271	29.5%
NAICS 55 (Management of Companies)	553	768	215	38.9%
NAICS 54 (Professional and Business Services)	1,697	1,839	142	8.4%
NAICS 53 (Real Estate and Rentals)	783	888	105	13.4%
NAICS 71 (Arts, Entertainment, and Recreation)	1,090	1,172	82	7.5%
NAICS 22 (Utilities)	155	169	14	9.0%
Federal Government	1,258	1,272	14	1.1%
NAICS 21 (Mining)	58	26	-32	-55.2%
State Government	2,577	2,465	-112	-4.3%
NAICS 52 (Finance and Insurance)	1,556	1,360	-196	-12.6%
NAICS 51 (Information)	798	496	-302	-37.8%
NAICS 81 (Other Services)	3,978	1,844	-2,134	-53.6%
TOTAL COVERED EMPLOYMENT	102,748	115,409	12,661	12.3%

Source: QCEW Data

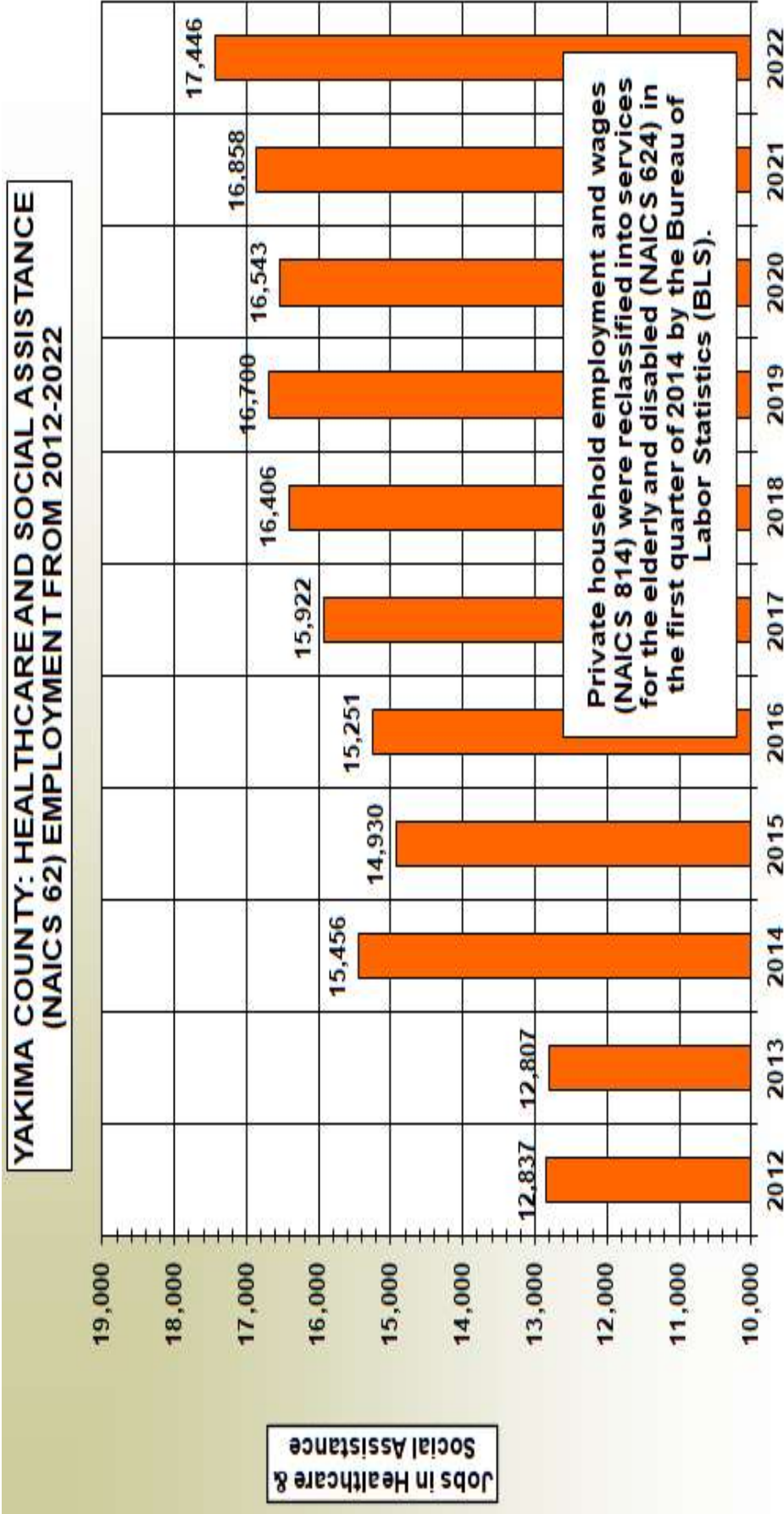
... Same data as Slide 6, but portraying job gains/losses (in #) in the “Top 4 and Bottom 4” Sectors during the 10-year period from 2012-2022

Comparison of Job Gains or Losses (in #) in “Top 4 and Bottom 4” Yakima County Covered Employment Sectors From 2012-2022 (As of 20 June 2023)



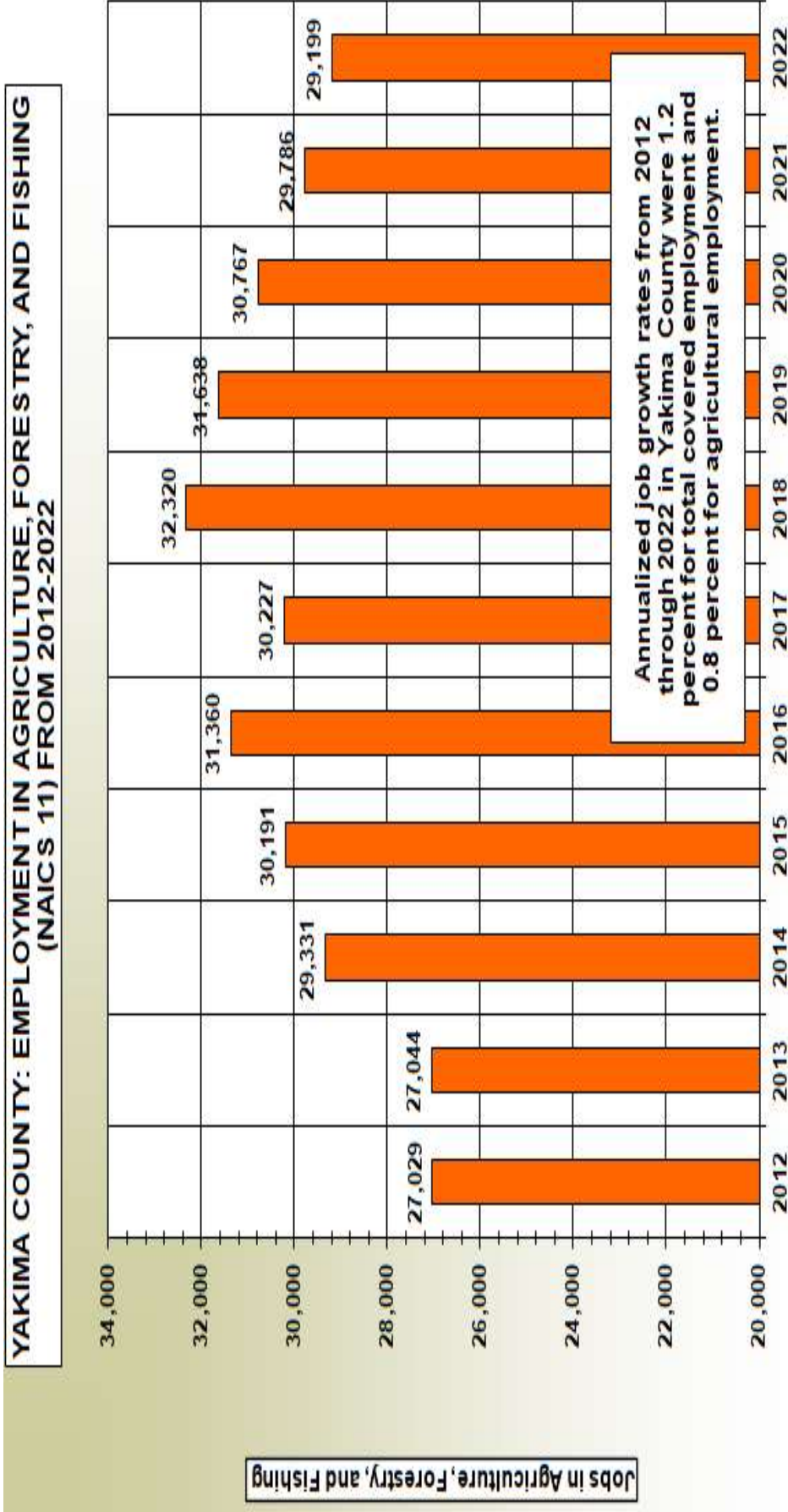
Source: QCEW Data

Yakima County's health services sector (NAICS 62) employment has been rising in the past 10 years (2012-2022), reaching a new "apex" in 2022.



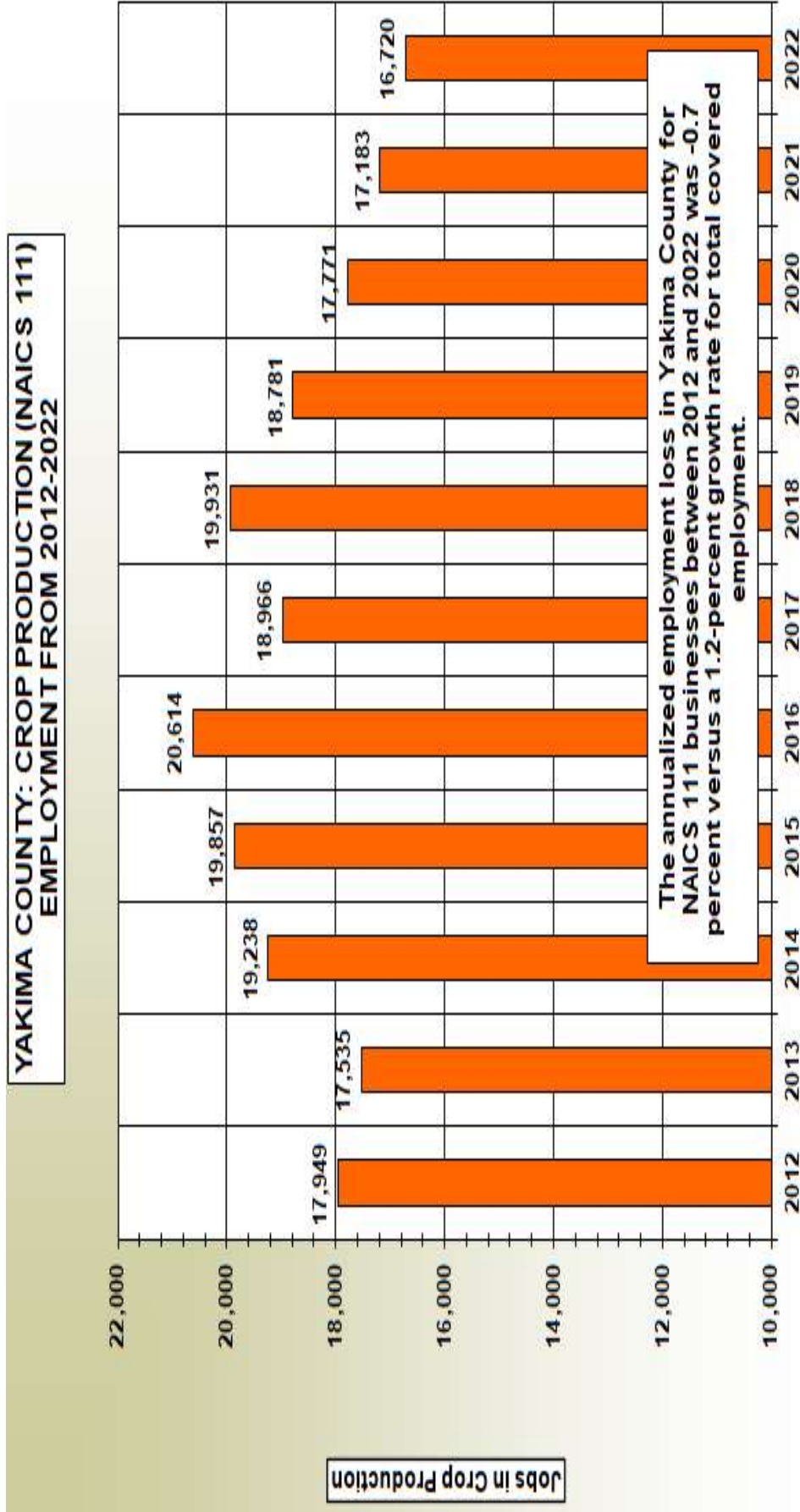
Source: QCEW Data

Agriculture was the sector adding the second-largest number of jobs from 2012-2022; yet employment has been “slipping” from 2018-2022.



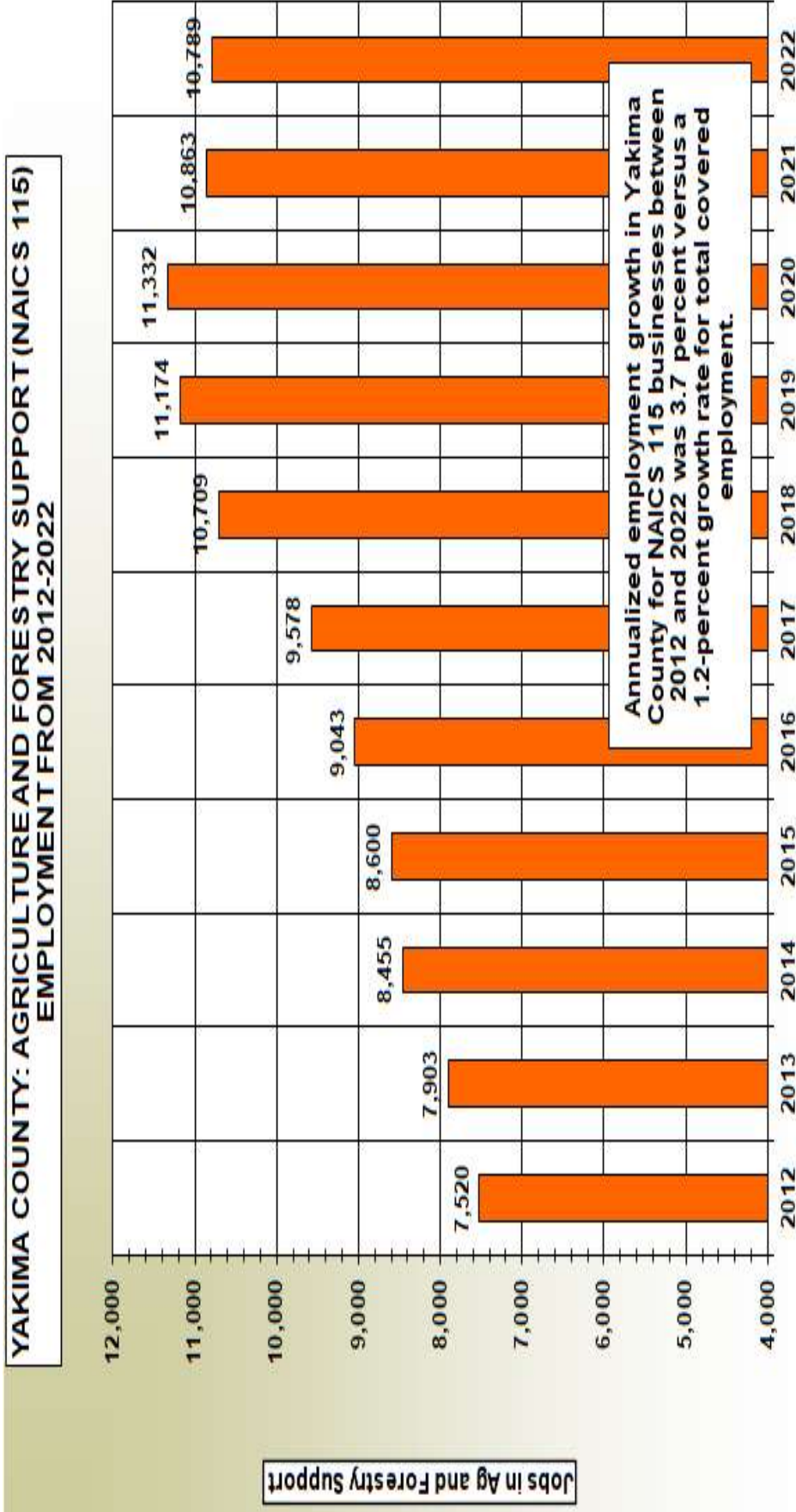
Source: QCEW Data

Yakima County's crop production subsector (NAICS 111) lost 1,229 jobs (-6.8 percent) in this 10-year period.



Source: QCEW Data

Agricultural support (NAICS 115): up 43.5 percent from 2012-2022 led by post-harvest crop activities (marijuana-processing) & labor contractors.



Source: QCEW Data

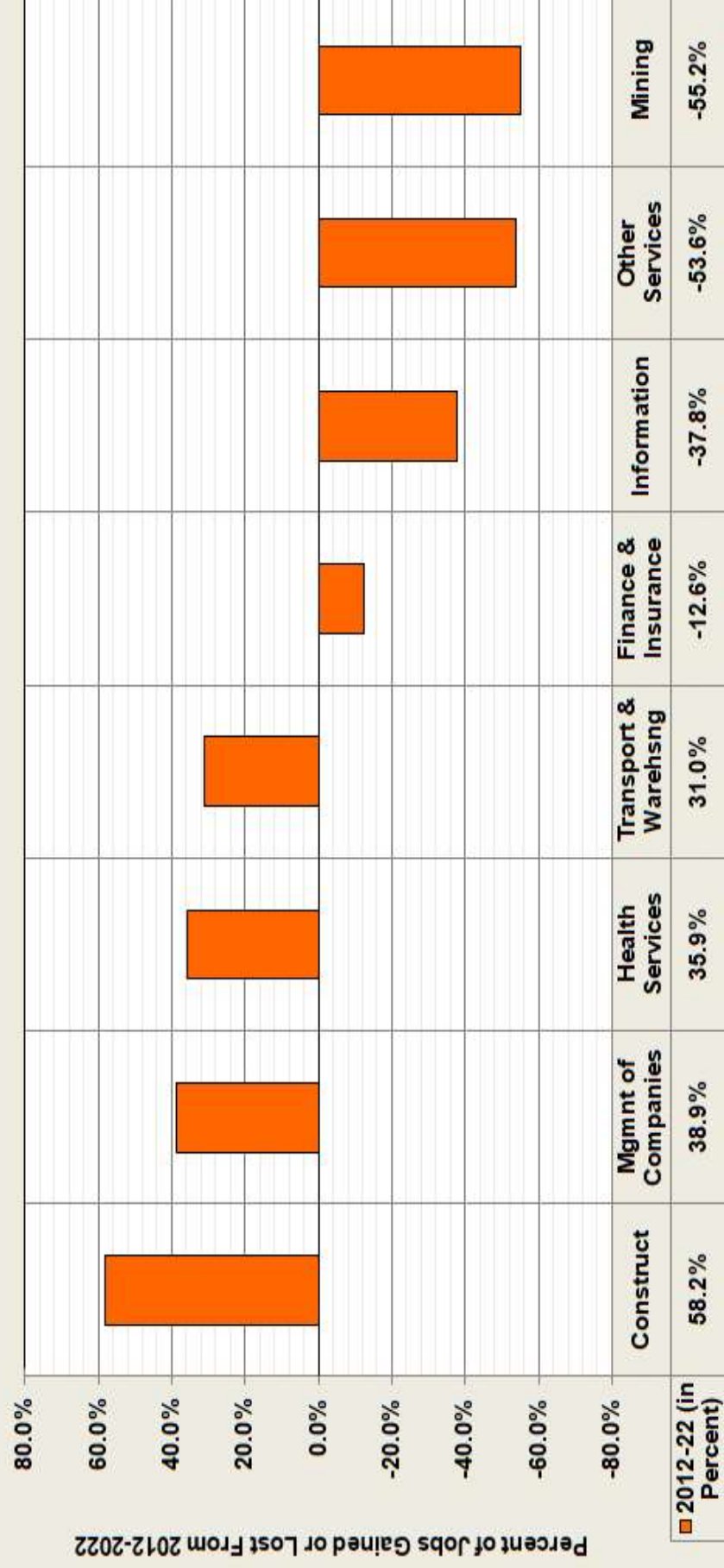
From 2012-2022, employment in construction, management of companies, health services, and transportation & warehousing grew “fastest.”

COVERED EMPLOYMENT BY INDUSTRY SECTOR IN YAKIMA COUNTY FROM 2012-2022 Sorted by Changes (in % of Jobs) From 2011-2021 (As of 20 June 2023)				
INDUSTRY	2012	2022	Job Changes (in #) From 2012-2022	Job Changes (in %) From 2012-2022
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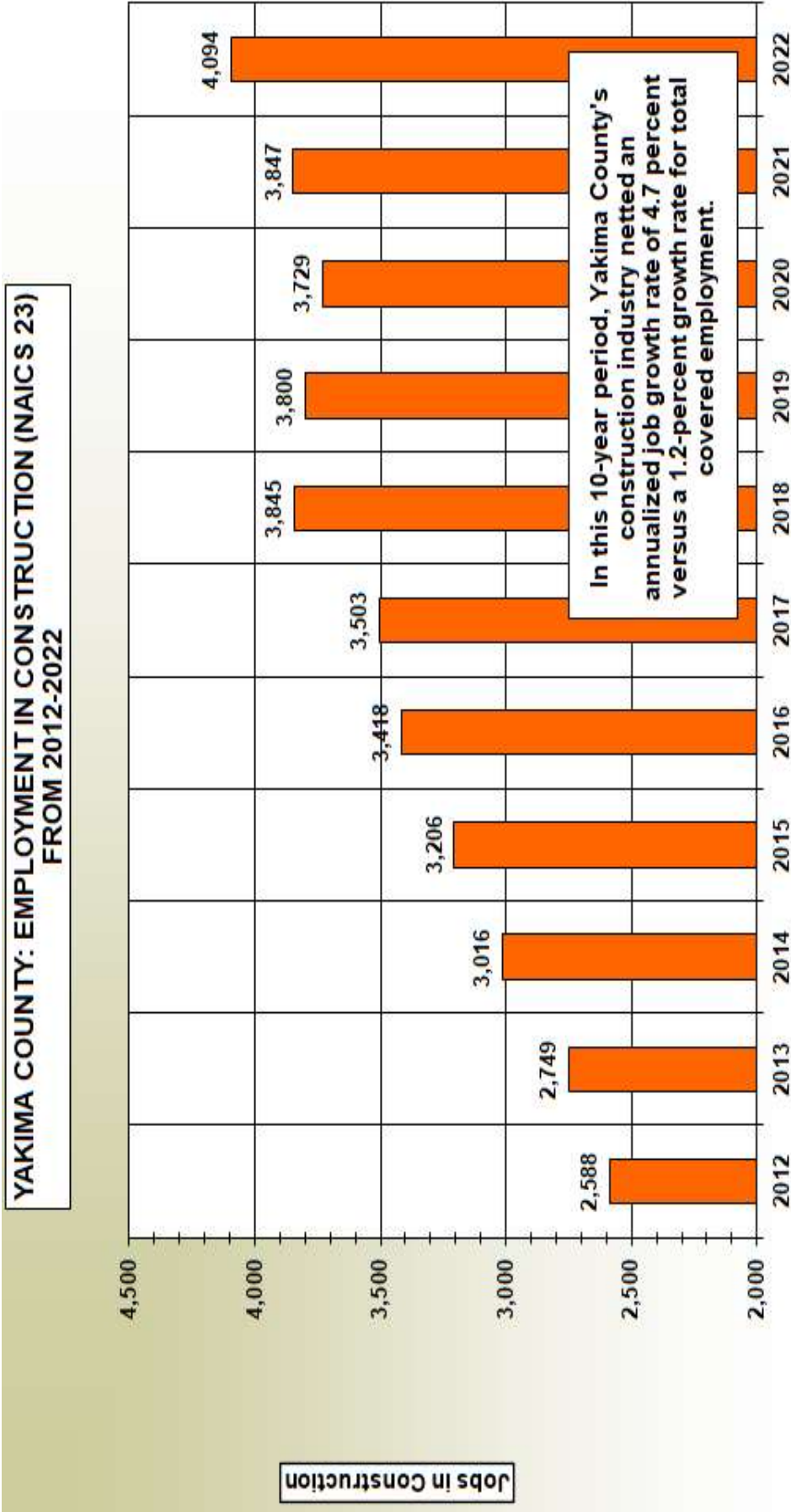
.... Same data as Slide 12, but portraying job gains/losses (in %) in the “Top 4 and Bottom 4” Sectors during the 10-year period from 2012-2022

Comparison of Job Gains or Losses (in %) in "Top 4 and Bottom 4" Yakima County Covered Employment Sectors From 2012-2022 (As of 20 June 2023)



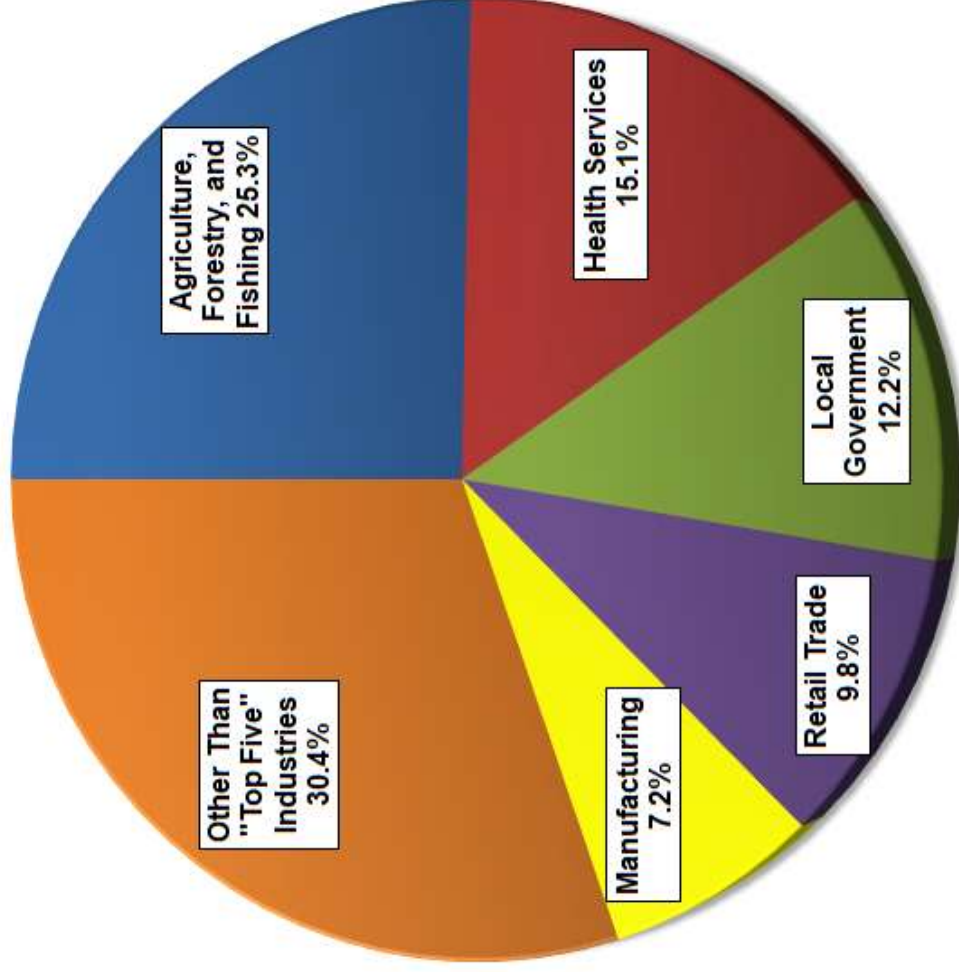
Source: QCEW Data

On a percentage basis, the local construction industry was the fastest growing sector from 2012-2022; rising 58.2 percent and adding 1,506 new jobs.



Source: QCEW Data

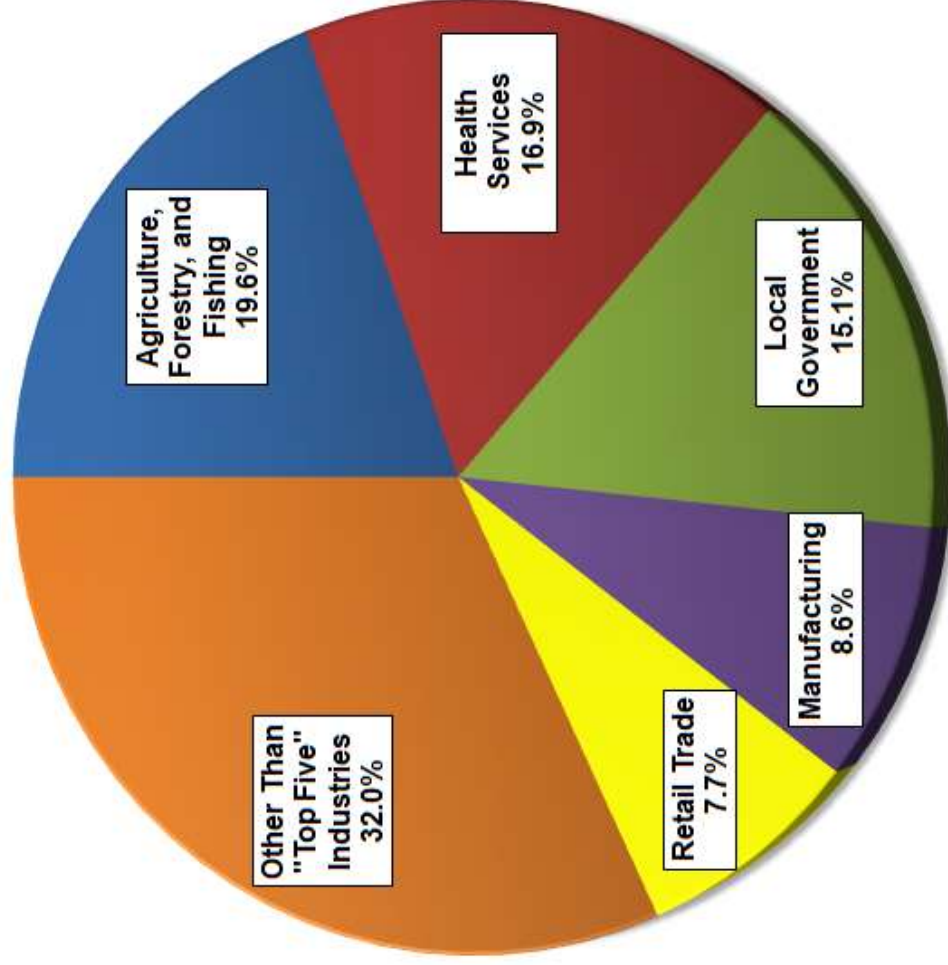
Yakima County: Top 5 industries by covered employment in 2022



Yakima County: Top Five Industries by Employment in 2022	
Industry	Number of Jobs
Agriculture, Forestry, and Fishing	29,199
Health Services	17,446
Local Government	14,067
Retail Trade	11,267
Manufacturing	8,356
Other Than "Top Five" Industries	35,074
Total Covered Employment	115,409

Source: QCEW Data

Yakima County: Top 5 industries by covered wages in 2022



Yakima County: Top Five Industries by Wages in 2022	
Industry	Number of Jobs
Agriculture, Forestry, and Fishing)	\$1,067,578,889
Health Services	\$924,254,882
Local Government	\$826,656,026
Manufacturing	\$470,076,068
Retail Trade	\$421,977,167
Other Than "Top Five" Industries	\$1,748,701,267
Total Covered Wages	\$5,459,244,299

Source: QCEW Data

Yakima County in 2022: Summary of “Top 5” industries (by covered employment)

Total covered wages = \$5.46 billion

Average annual employment = 115,409

**Average annual wage = \$47,303 (57.1 percent of Washington
State’s average annual wage in 2022 of \$82,886)**

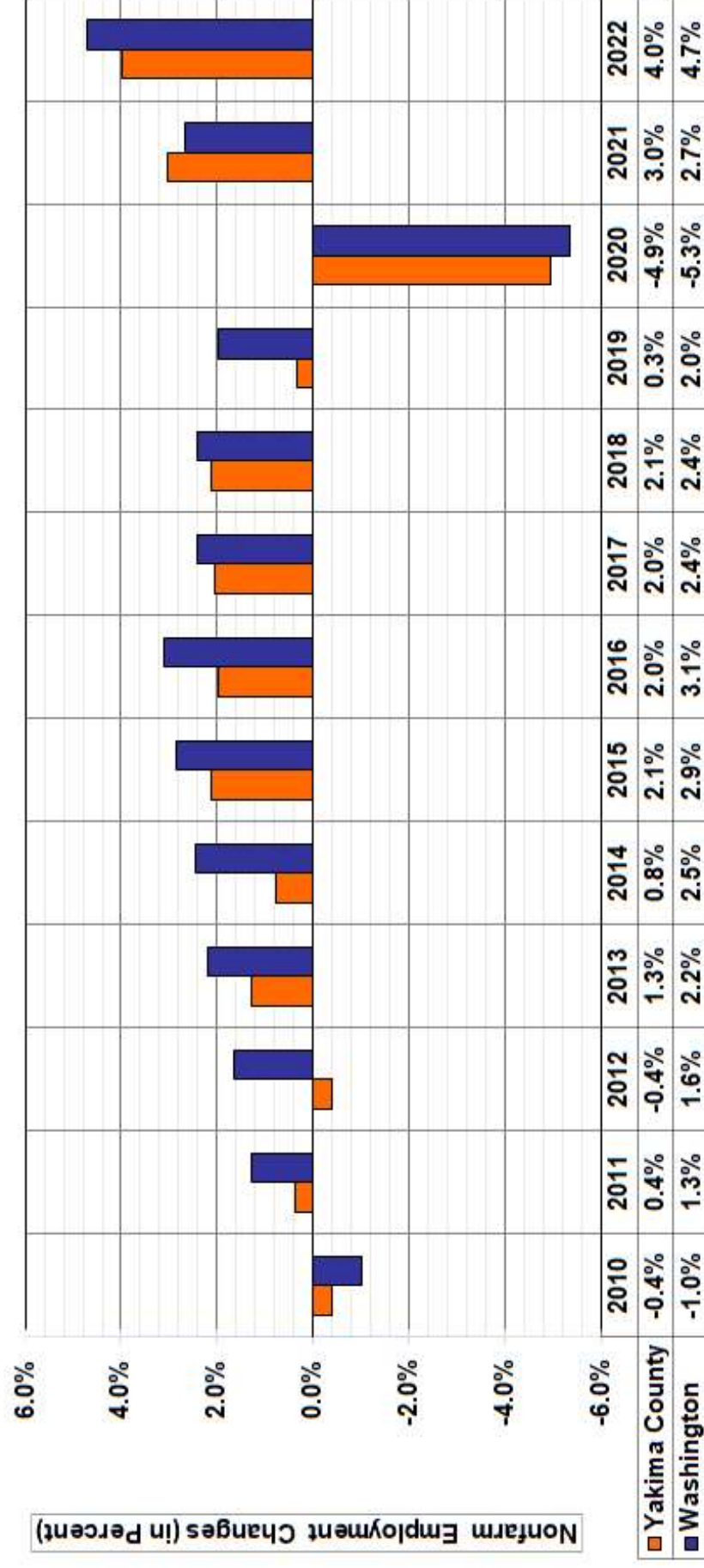
Industry	Percent of jobs (in Yakima County)	Percent of wages (in Yakima County)
Agriculture	25.3	19.6
Health services	15.1	16.9
Local government	12.2	15.1
Retail trade	9.8	7.7
Manufacturing	7.2	8.6

Yakima County: 10-year (2012-2022) and current (2022) covered employment trends (Based on QCEW data, Slides 4-17)

- From 2012-2022, covered employment rose 12.3 percent (declining -4.4 percent in 2020 before rising 1.4 percent in 2021 and 2.8 percent in 2022).
- Health services (NAICS 62) and agriculture (NAICS 11) provided 53.5 percent of the 12,661 jobs added from 2012-2022.
- Agriculture was the sector adding the second-largest number of jobs from 2012-2022; but jobs decreased from 2018-2022:
 - The crop production subsector (NAICS 111) lost 1,229 jobs (-6.8 percent) in this 10-year period.
 - Agricultural support (NAICS 115) rose 43.5 percent led by post-harvest crop activities & labor contractors.
- Construction was the fastest growing sector (on a % basis), jumping by 58.2 percent and adding 1,508 new jobs.

Following pandemic-related layoffs in 2020, the Yakima County nonfarm job market grew by 3.0 percent in 2021 and by 4.0 percent in 2022.

Annual Average Nonfarm Employment Changes (in Percent) from 2010-2022 in Yakima County and in Washington State (As of 20 June 2023)



Source: CES Data

COVID-19-related job losses were traumatic to the Yakima County economy in 2020. The nonfarm job market lost 4,300 jobs, a -4.9 percent downturn.

Yakima County: Nonfarm Job Growth in Major Industries From 2019-2020 (As of 20 June 2023)				
Industry	Ann. Avg. Employment in 2019	Ann. Avg. Employment in 2020	Job Change	Percent Change
Total Nonfarm ¹	87.1	82.8	(4.3)	-4.9%
Total Private	69.0	65.7	(3.2)	-4.7%
Goods Producing	12.9	12.2	(0.6)	-4.9%
Mining, Logging, and Construction	4.2	4.1	(0.1)	-2.0%
Manufacturing	8.7	8.1	(0.5)	-6.2%
Nondurable Goods	5.7	5.4	(0.3)	-5.3%
Service Providing	74.2	70.6	(3.7)	-4.9%
Private Service Providing	56.1	53.5	(2.6)	-4.6%
Trade, Transportation, and Utilities	19.1	19.0	(0.1)	-0.5%
Wholesale Trade	4.5	4.5	0.0	0.6%
Retail Trade	11.0	10.8	(0.2)	-1.4%
Transportation and Utilities	3.6	3.7	0.0	0.9%
Professional and Business Services	4.4	4.2	(0.2)	-4.7%
Education and Health Services	18.2	18.0	(0.2)	-1.1%
Health Care and Social Assistance	16.8	16.7	(0.1)	-0.6%
Leisure and Hospitality	8.3	6.6	(1.7)	-20.7%
Food Services	6.3	5.3	(1.1)	-16.8%
Government	18.1	17.1	(1.1)	-5.9%
Federal Government	1.3	1.3	(0.0)	-0.7%
State Government	2.7	2.6	(0.1)	-3.8%
Local Government	14.2	13.2	(1.0)	-6.7%

¹ Excludes proprietors, self-employed, members of the armed services, workers in private households and agriculture. Columns may not add due to rounding.

Source: CES Data

The Yakima County nonfarm job market recovered from 2020 to 2021 by recovering 2,500 jobs, a 3.0 percent upturn.

Yakima County: Nonfarm Job Growth in Major Industries From 2020-2021 (As of 20 June 2023)				
Industry	Ann. Avg. Employment in 2020	Ann. Avg. Employment in 2021	Job Change	Percent Change
Total Nonfarm ¹	82.8	85.3	2.5	3.0%
Total Private	65.7	68.1	2.3	3.5%
Goods Producing	12.2	12.4	0.2	1.6%
Mining, Logging, and Construction	4.1	4.3	0.1	3.5%
Manufacturing	8.1	8.2	0.1	0.6%
Nondurable Goods	5.4	5.4	0.0	0.5%
Service Providing	70.6	72.8	2.3	3.2%
Private Service Providing	53.5	55.6	2.1	4.0%
Trade, Transportation, and Utilities	19.0	19.7	0.7	3.8%
Wholesale Trade	4.5	4.5	(0.0)	-0.7%
Retail Trade	10.8	11.3	0.5	4.8%
Transportation and Utilities	3.7	3.9	0.2	6.4%
Professional and Business Services	4.2	4.5	0.2	5.1%
Education and Health Services	18.0	18.4	0.4	2.3%
Health Care and Social Assistance	16.7	17.1	0.3	2.1%
Leisure and Hospitality	6.6	7.5	1.0	14.7%
Food Services	5.3	5.9	0.7	12.5%
Government	17.1	17.2	0.1	0.9%
Federal Government	1.3	1.3	0.0	2.7%
State Government	2.6	2.4	(0.1)	-4.6%
Local Government	13.2	13.5	0.2	1.8%

¹ Excludes proprietors, self-employed, members of the armed services, workers in private households and agriculture. Columns may not add due to rounding.

Source: CES Data



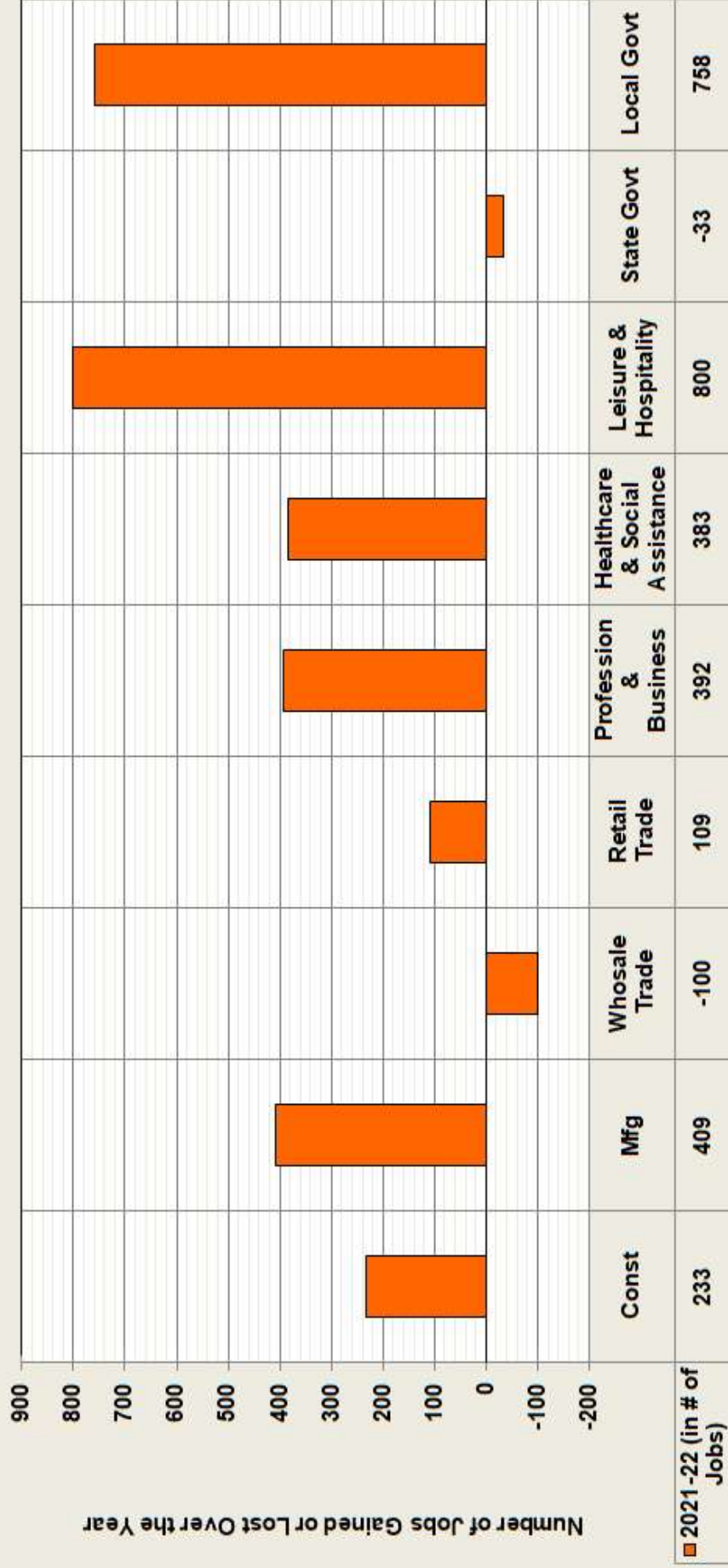
The Yakima County nonfarm job market also expanded from 2021 to 2022 by gaining back 3,400 jobs, a healthy 4.0 percent upturn.

Yakima County: Nonfarm Job Growth in Major Industries From 2021-2022 (As of 20 June 2023)				
Industry	Ann. Avg. Employment in 2021	Ann. Avg. Employment in 2022	Job Change	Percent Change
Total Nonfarm ¹	85.3	88.7	3.4	4.0%
Total Private	68.1	70.8	2.7	4.0%
Goods Producing	12.4	13.1	0.6	5.2%
Mining, Logging, and Construction	4.3	4.5	0.2	5.5%
Manufacturing	8.2	8.6	0.4	5.0%
Nondurable Goods	5.4	5.7	0.3	4.8%
Service Providing	72.8	75.6	2.8	3.8%
Private Service Providing	55.6	57.7	2.1	3.7%
Trade, Transportation, and Utilities	19.7	19.9	0.2	0.9%
Wholesale Trade	4.5	4.4	(0.1)	-2.2%
Retail Trade	11.3	11.4	0.1	1.0%
Transportation and Utilities	3.9	4.1	0.2	4.5%
Professional and Business Services	4.5	4.8	0.4	8.8%
Education and Health Services	18.4	18.9	0.5	2.7%
Health Care and Social Assistance	17.1	17.5	0.4	2.2%
Leisure and Hospitality	7.5	8.3	0.8	10.6%
Food Services	5.9	6.5	0.5	9.1%
Government	17.2	17.9	0.7	4.3%
Federal Government	1.3	1.3	0.0	0.6%
State Government	2.4	2.4	(0.0)	-1.4%
Local Government	13.5	14.2	0.8	5.6%
¹ Excludes proprietors, self-employed, members of the armed services, workers in private households and agriculture. Columns may not add due to rounding.				

Source: CES Data

Two industries showed especially strong job growth in Yakima County from 2021-2022; leisure & hospitality and local government.

Comparison of Job Gains or Losses (in #) in Major Yakima County Nonfarm Industries From 2021-2022 (As of 20 June 2023)



Source: CES Data

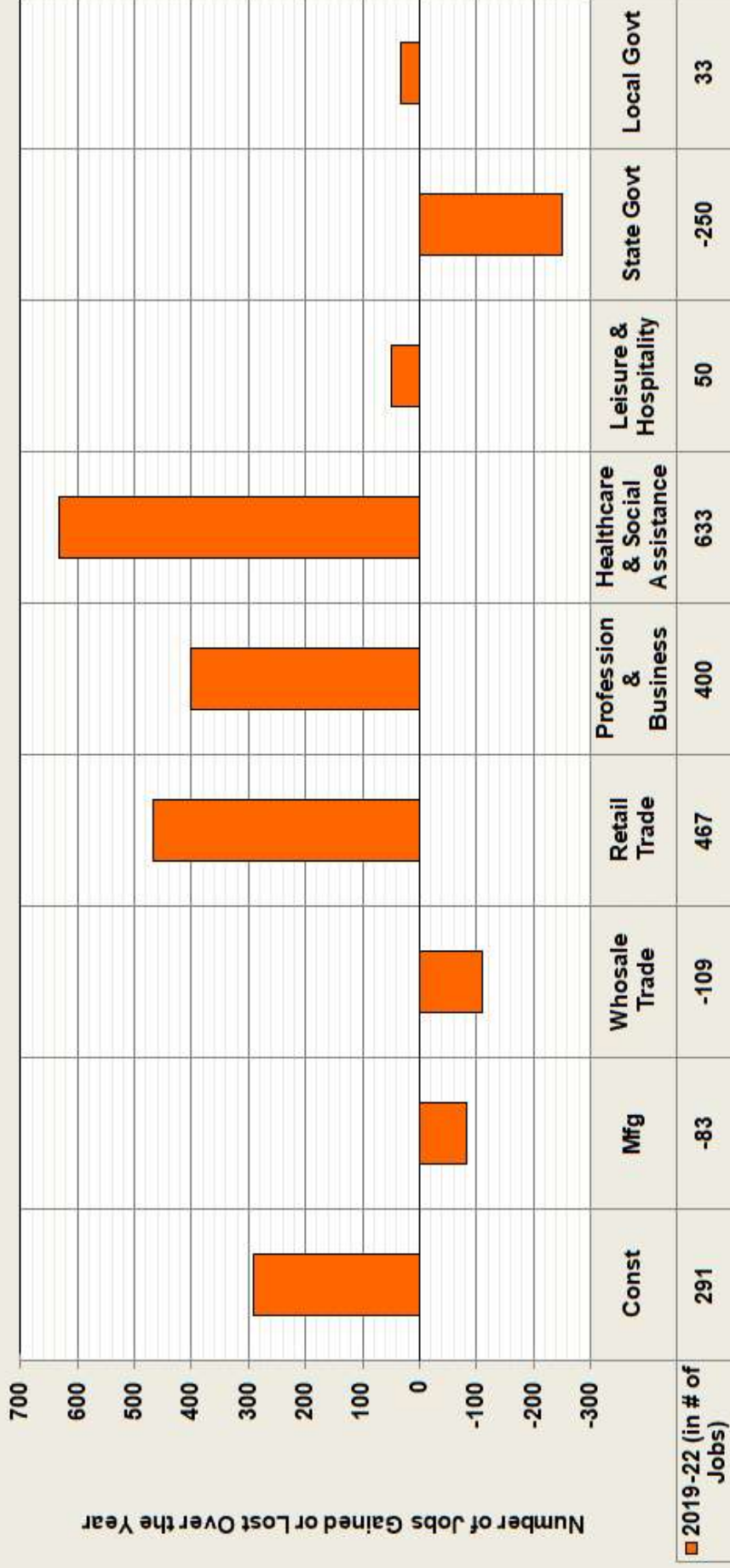
Total nonfarm employment in 2022 was 1.9 percent and 1,600 jobs above the pre-pandemic era of 2019; but not all industries made a “full recovery.”

Yakima County: Nonfarm Job Growth in Major Industries From 2019-2022 (As of 20 June 2023)				
Industry	Ann. Avg. Employment in 2019	Ann. Avg. Employment in 2022	Job Change	Percent Change
Total Nonfarm ¹	87.1	88.7	1.6	1.9%
Total Private	69.0	70.8	1.8	2.6%
Goods Producing	12.9	13.1	0.2	1.6%
Mining, Logging, and Construction				
Manufacturing	4.2	4.5	0.3	6.9%
Nondurable Goods	8.7	8.6	(0.1)	-1.0%
Service Providing	5.7	5.7	(0.0)	-0.3%
Private Service Providing	74.2	75.6	1.4	1.9%
Trade, Transportation, and Utilities	56.1	57.7	1.6	2.9%
Wholesale Trade	19.1	19.9	0.8	4.2%
Retail Trade	4.5	4.4	(0.1)	-2.4%
Transportation and Utilities	11.0	11.4	0.5	4.3%
Professional and Business Services	3.6	4.1	0.4	12.2%
Education and Health Services	4.4	4.8	0.4	9.0%
Health Care and Social Assistance	18.2	18.9	0.7	3.9%
Leisure and Hospitality	16.8	17.5	0.6	3.8%
Food Services	8.3	8.3	0.0	0.6%
Government	6.3	6.5	0.1	2.1%
Federal Government	18.1	17.9	(0.2)	-1.0%
State Government	1.3	1.3	0.0	2.6%
Local Government	2.7	2.4	(0.3)	-9.4%
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Source: CES Data

Since the pre-COVID era: healthcare and retail trade rebounded; but state government, wholesale trade, and manufacturing have not yet recovered.

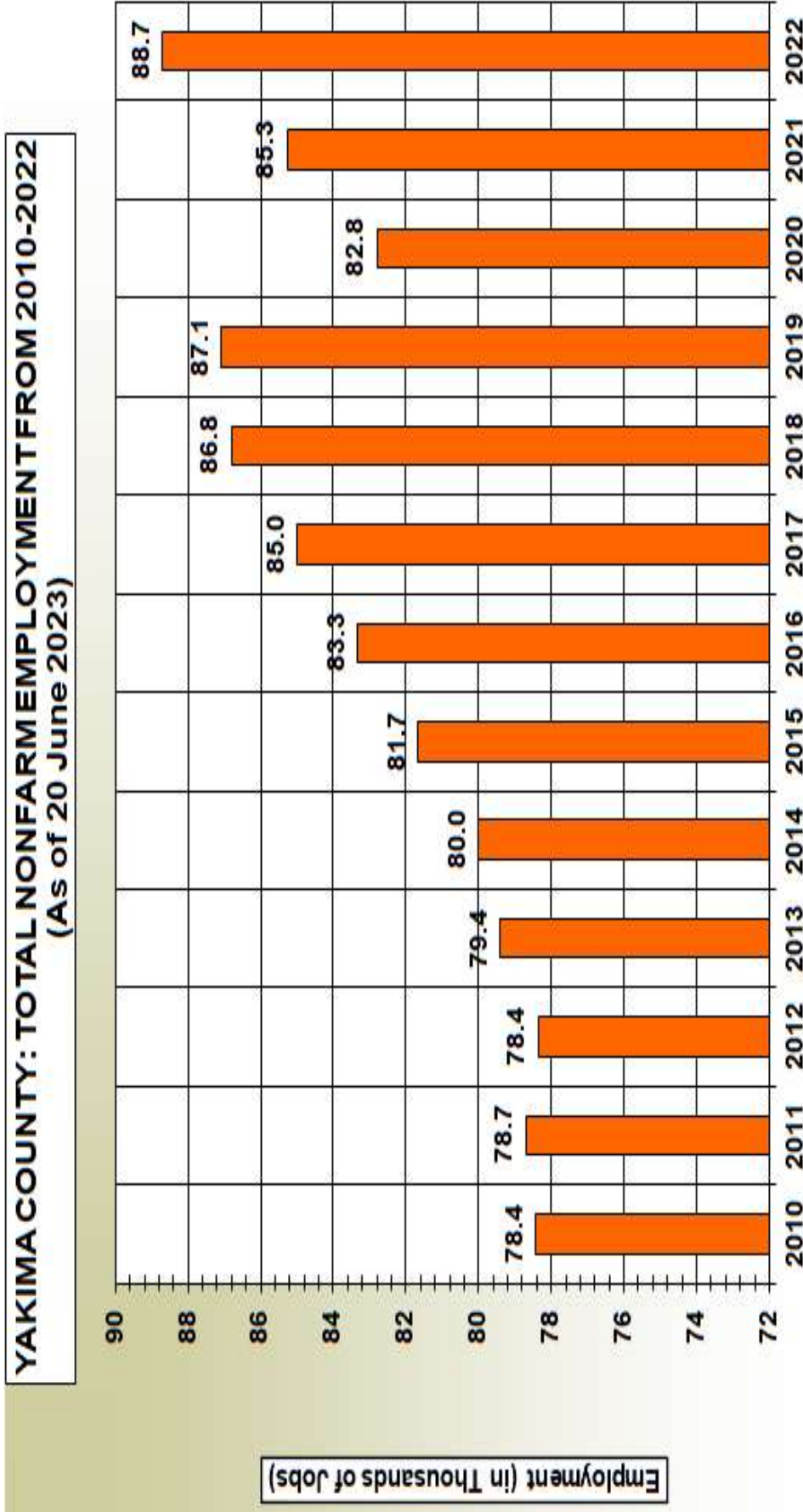
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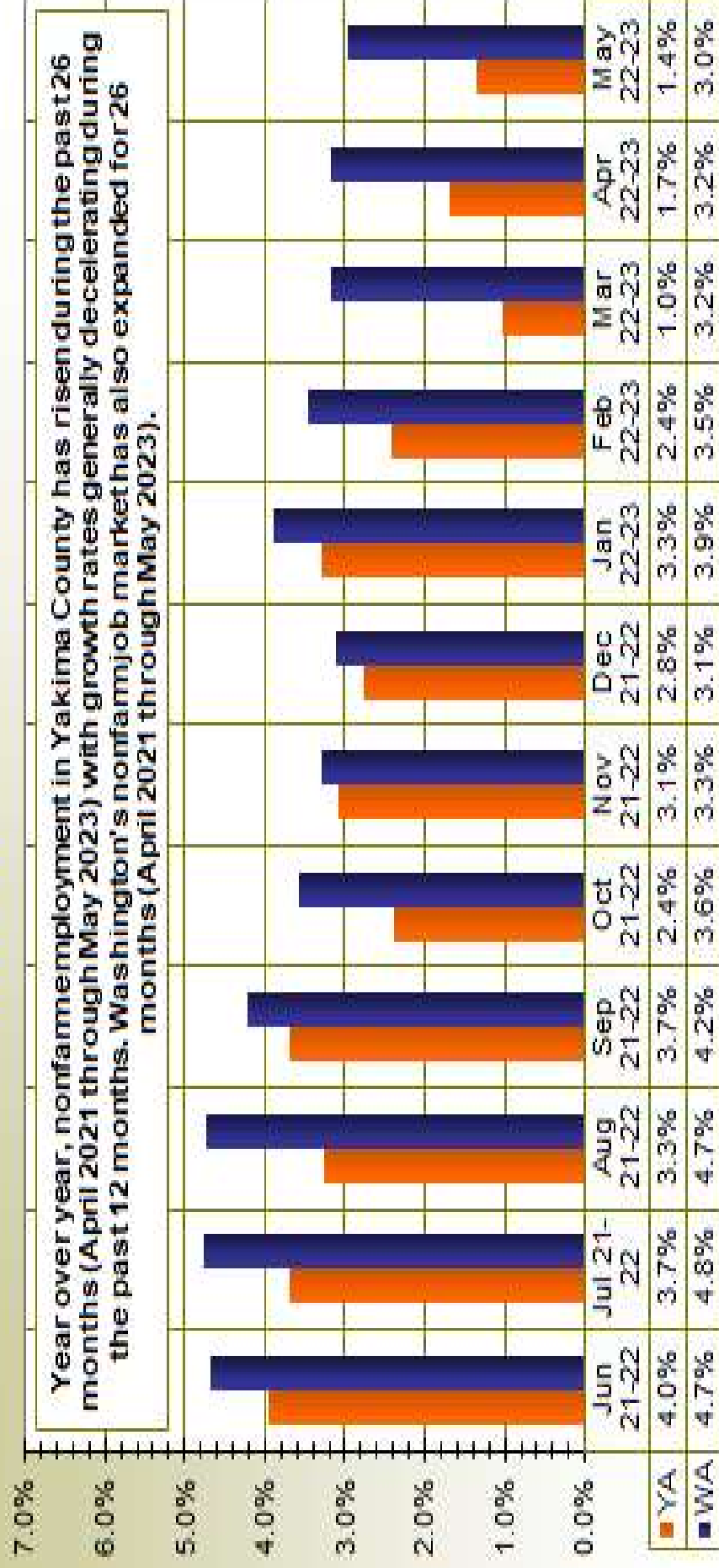
Yet, in aggregate, by 2022 the local economy recovered the total number of nonfarm jobs lost due to COVID-19 related layoffs in 2020.



Source: CES Data

The good news: total nonfarm employment (“place of work” data) in Yakima County and across Washington has been rising for 26 months.

**Yakima County and Washington:
Total Nonfarm Employment Changes
During the Last Twelve Months**



Source: CES Data

CES estimates indicate job growth in all but two (manufacturing and transportation & utilities) industries between the Mays of 2022 and 2023.

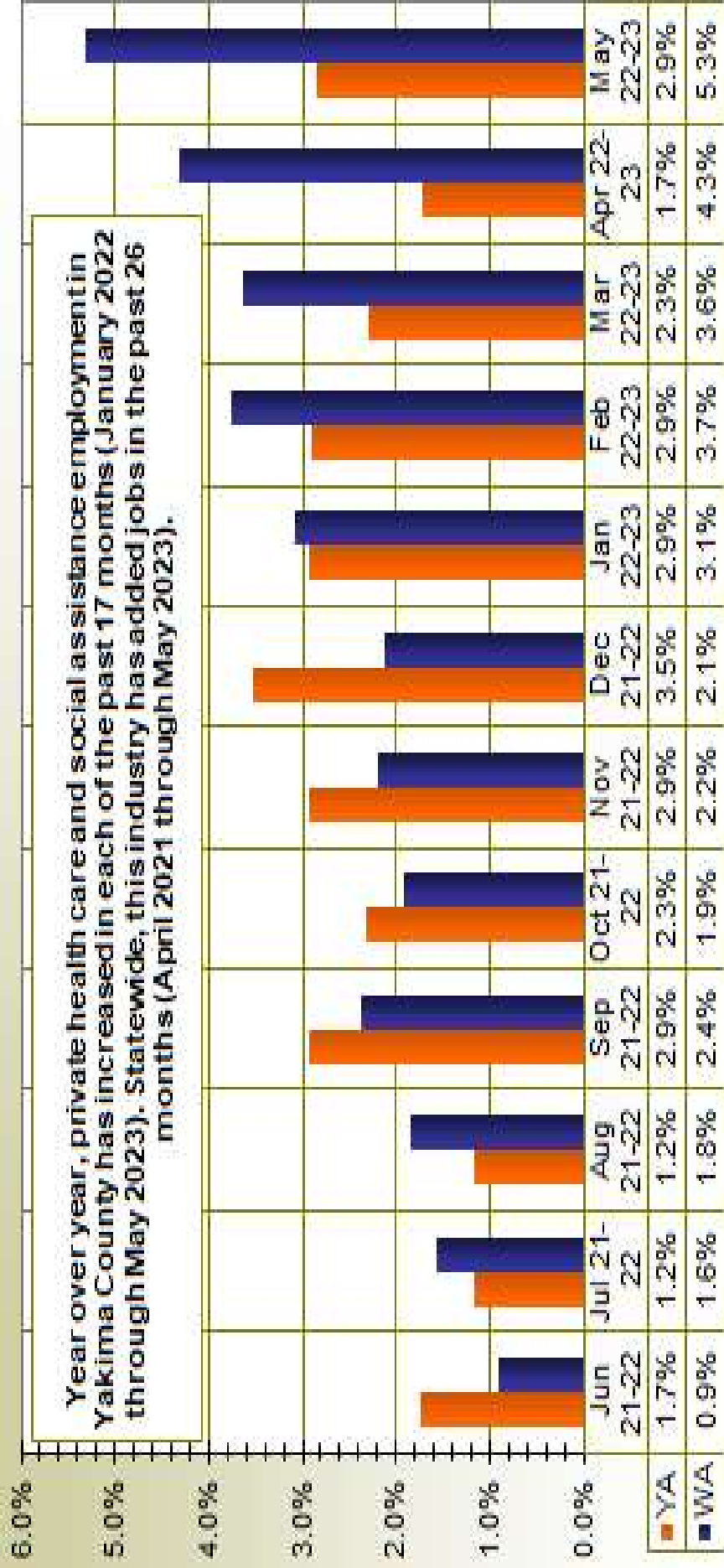
Yakima County: Nonfarm Job Growth in Major Industries From May 2022-May 2023 (As of 20 June 2023)				
Industry	Employment in May 2022	Employment in May 2023	Job Change	Percent Change
Total Nonfarm ¹	88.8	90.0	1.2	1.4%
Total Private	70.7	71.7	1.0	1.4%
Goods Producing	13.0	12.9	(0.1)	-0.8%
Mining, Logging, and Construction				
Manufacturing	4.5	4.5	0.0	0.0%
Nondurable Goods	8.5	8.4	(0.1)	-1.2%
Service Providing	5.6	5.5	(0.1)	-1.8%
Private Service Providing	75.8	77.1	1.3	1.7%
Trade, Transportation, and Utilities	57.7	58.8	1.1	1.9%
Wholesale Trade	19.9	20.0	0.1	0.5%
Retail Trade	4.5	4.6	0.1	2.2%
Transportation and Utilities	11.4	11.5	0.1	0.9%
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Source: CES Data

Job growth rates in Yakima County's health care and social assistance industry have been “healthy” in each of the past 17 months...

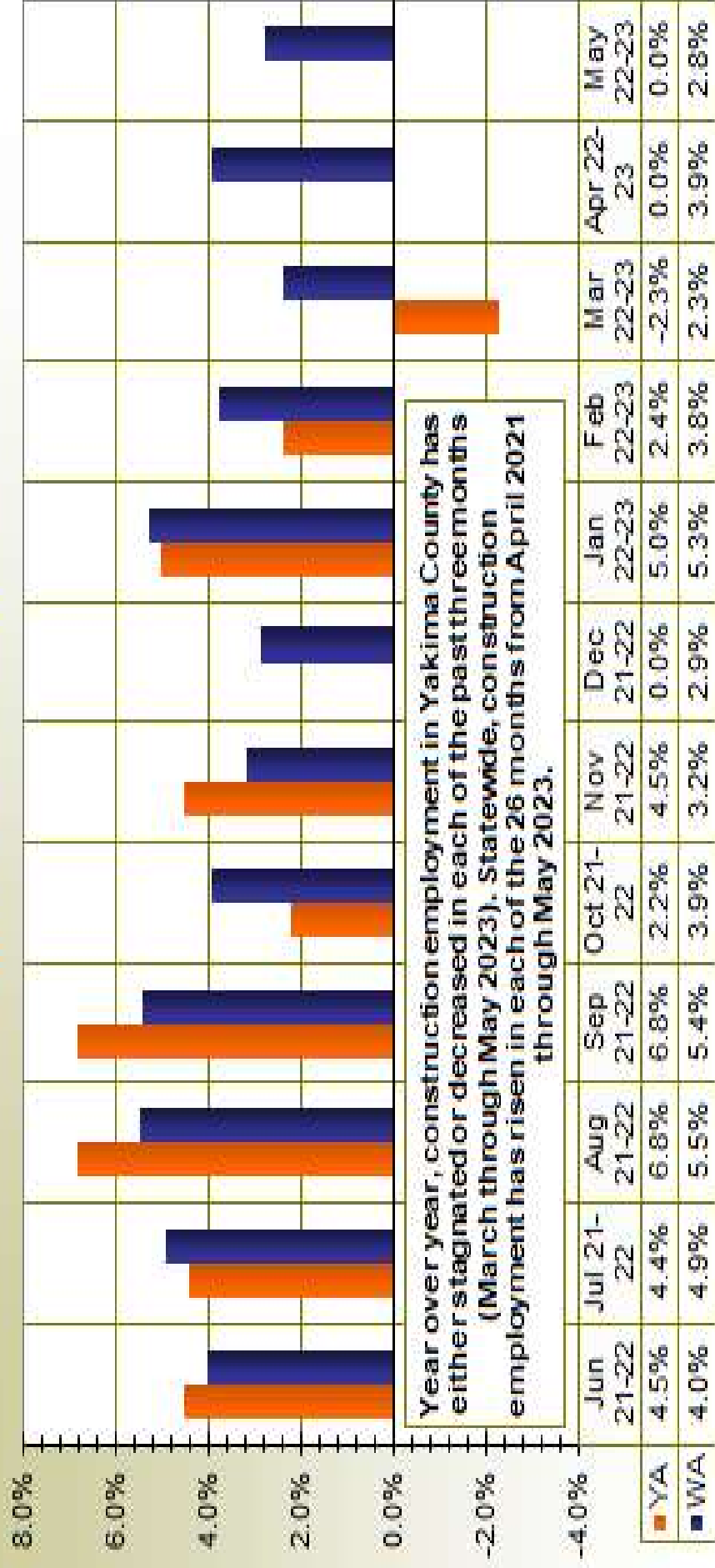
**Yakima County and Washington:
Health Care and Social Assistance Employment Changes
During the Last Twelve Months**



Source: CES Data

... But job growth rates in the local construction industry have been “less than stellar” in the past three months (March through May 2023).

**Yakima County and Washington:
Construction Employment Changes
During the Last Twelve Months**



Source: CES Data

Yakima County: Nonfarm employment trends through May 2023

(Based on CES data, Slides 19-30)

- From the pre-pandemic era of 2019 to 2022, total nonfarm employment grew by 1.9 percent and 1,600 jobs. But not all industries made a “full recovery.” Healthcare and retail trade rebounded; but state government, wholesale trade, and manufacturing have not recovered since the pre-COVID era.
- From 2021 to 2022, the nonfarm market expanded by 3,400 jobs (up 4.0 percent), from an average of 85,300 jobs to 88,700. Of the 3,400 jobs gained countywide in 2022, 61.8 percent were in: local government (up 800 jobs), leisure & hospitality (up 800 jobs), and private education and health services (up 500 jobs).
- Between the Mays of 2022 and 2023, the Yakima County nonfarm market advanced at a 1.4-percent pace. Job gains were led by healthcare and leisure and hospitality. Nondurable goods manufacturing and transportation retrenched. Construction employment stagnated.

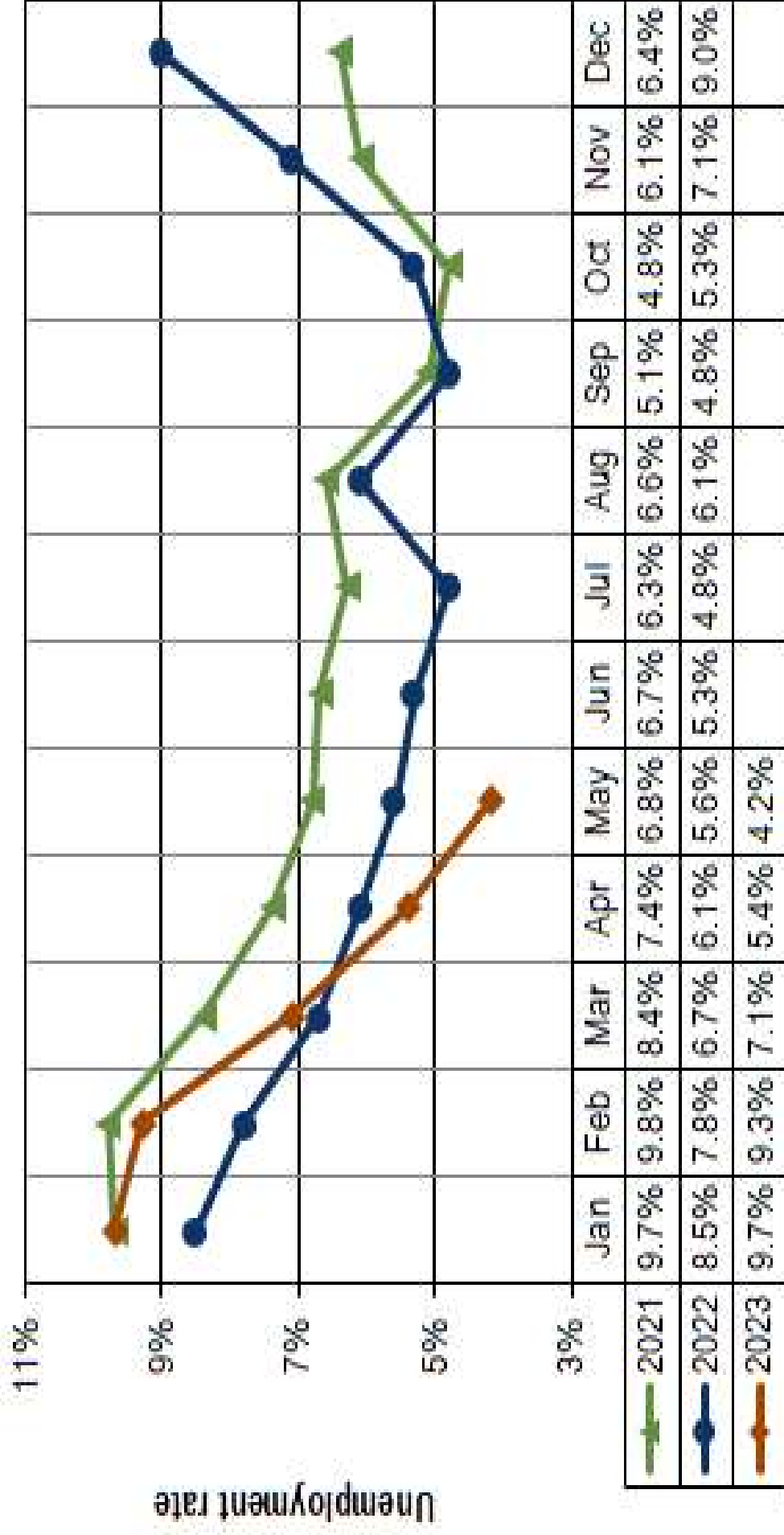
Yakima County's 6.4 percent unemployment rate in 2022 was the second-lowest rate since the historic low of 6.3 percent in 2018.

Annual Average Unemployment Rates from 2010-2022 in Yakima County and in Washington State (As of 20 June 2023)



Source: LAUS Data

Year over year, monthly rates rose from October 2022 through March 2023 before declining in April and May 2023.



Source: LAUS Data

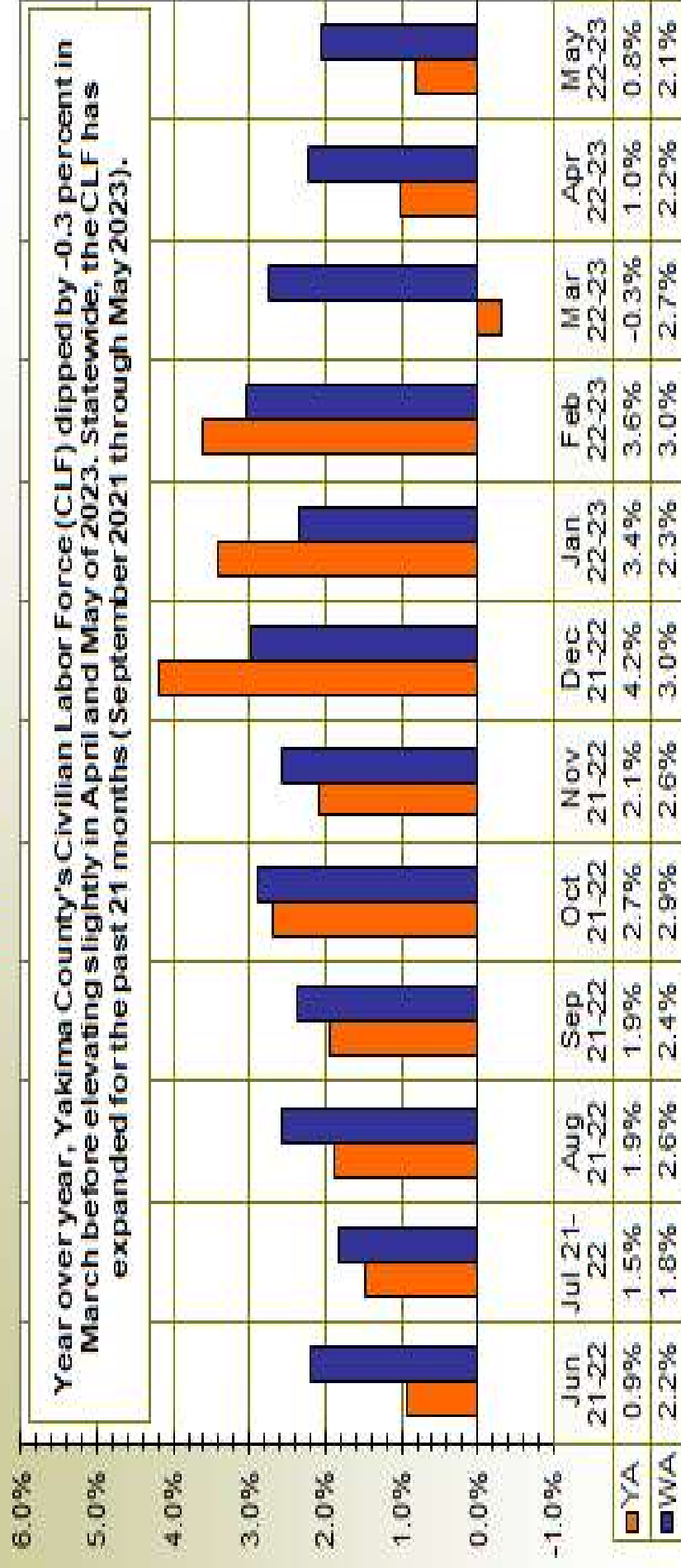
Between the Mays of 2022 and 2023 the labor force elevated and the number of unemployed plummeted, hence the rate fell one and four-tenths points.

			Change (in #)	Change (in %)
Yakima County			May-22	May-22
			May-23	May-23
Labor force and unemployment				
Civilian labor force			129,317	0.8%
Resident employment			122,042	2.3%
Unemployment			-1,745	-24.0%
Unemployment rate			-1.4	

Source: LAUS Data

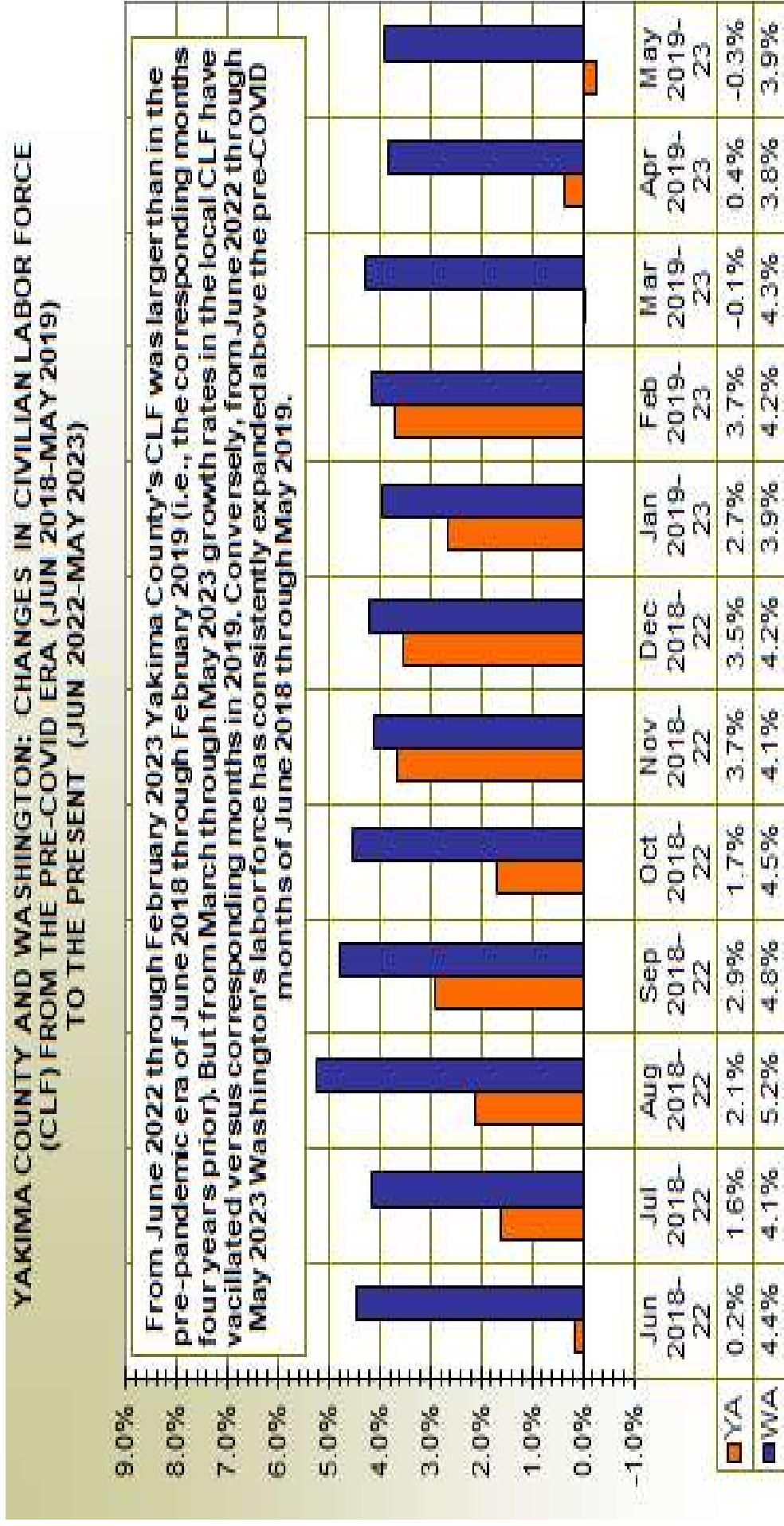
Local labor force growth rates, year over year, were less than growth rates statewide from March through May 2023.

**Yakima County and Washington:
Civilian Labor Force Changes
During the Last Twelve Months**



Source: LAUS Data

And, Yakima County's labor force this March, April, and May has “vacillated” compared with the pre-COVID months of March through May 2019.



Source: LAUS Data

Yakima County: Civilian Labor Force (CLF) & unemployment rate trends through May 2023 (Based on LAUS data, Slides 32-36)

- Yakima County's 6.4 percent unemployment rate in 2022 was the second-lowest rate since the historic low rate of 6.3 percent in 2018.
- Year over year, monthly unemployment rates rose from October 2022 through March 2023 before declining in the past two months (April and May 2023).
- However, year over year, local labor force growth rates have been slower than statewide growth rates from March-May 2023.
- During the past three months (March-May 2023), Yakima County's CLF has "vacillated" versus corresponding months in the pre-COVID era; indicating that the CLF is roughly the same size now as it was before the pandemic (four years ago).

Point of contact (POC) information and questions

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