



# Utah Data Guide

Utah State Data Center

A Newsletter for Data Users

Governor's Office of Planning & Budget, Demographic & Economic Analysis

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## Employment and Population Impacts of Circle Four Farms: Four Development Scenarios

*Editor's Note: Researchers within the Governor's Office of Planning and Budget at the request of the Beaver County Commission have analyzed the economic and demographic impacts of Circle Four Farms on southwest Utah. Circle Four Farms is a large and expanding pork production facility located in Beaver County. This research is summarized at length in this newsletter to: 1.) inform data users about the significant impact of the Circle Four development on the economy and population of the area, and 2.) demonstrate the capability of GOPB to analyze the impact of large developments on the state. For more information on this research contact the Demographic and Economic Analysis section at 538-1036 and visit our internet site at [www.gvinfo.state.ut.us/dea](http://www.gvinfo.state.ut.us/dea).*

This research estimates the population and employment impacts for each of four possible Circle Four Farms development scenarios. There is still a great deal of uncertainty as to exactly which of the development scenarios will occur, the configuration of the transportation component of the operation, and the geographical distribution of the increased population. Assumptions associated with the four scenarios have been developed in collaboration with the Division of Business and Economic Development of the Department of Community and Economic Development, which has, in turn, been directly involved with Circle Four, other state agencies, and local officials and planners. The impacts discussed here have been generated by the Utah Process Economic and Demographic Model (UPED) and sub-county allocations of these have been produced by a single constraint gravity model; both of these are components of the State of Utah Demographic and Economic Projection Model System.

### Introduction

Circle Four Farms is a large and expanding pork production facility located primarily in Beaver County, Utah. The firm indicates that it might expand its operations in the state to include meat processing as well as livestock production. Given the magnitude and scope of the planned and proposed operations, the associated labor requirements, and the sparseness of the current population in this area, Circle Four will undoubtedly have a significant effect on the future of this area of southwestern Utah, particularly Beaver County.

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## Development Scenarios

Circle Four Farms is a joint venture of Smithfield Foods, Carroll's Foods, Murphy Farms, and Prestage Farms, all of which are established leaders in the pork production and food processing industries. Ground breaking for the Circle Four Farms pork production operation occurred at the end of 1993 in Beaver County, Utah. Subsequently, Circle Four Farms has continued construction on its facilities and in 1995 began production. The current operation consists of the partially completed hog farm and a feed mill. Circle Four has defined four development scenarios.

Scenario 1 is full development of the hog production (farm) facilities in Beaver and Iron Counties along with the feed mill operation in Milford. The anticipated construction period is five years, with an average construction employment of nearly 260. The farm operations should reach capacity in the year 2000, with employment at an anticipated level of 888 persons.<sup>1</sup> At full capacity the operation should produce between 2.2 and 2.4 million hogs for slaughter annually. In all four scenarios, materials for the feed mill are transported by some combination of rail and truck, and the output of the operations, whether livestock or bacon, is transported out by truck. Once processed, these products will be sold on the west coast of the U.S. and exported to the Pacific Rim.

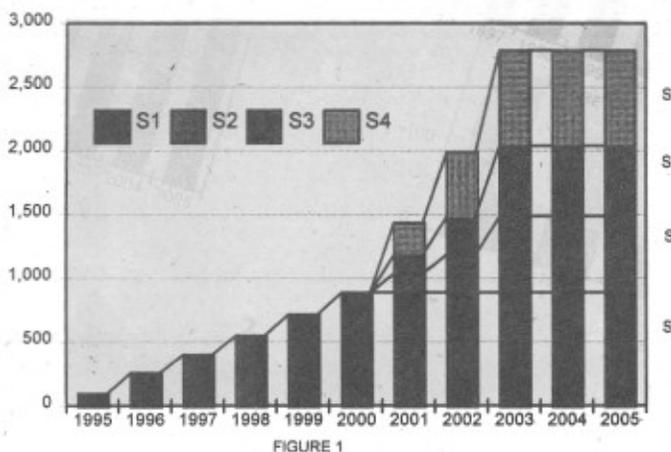
Circle Four Farms plans a fully integrated and highly efficient pork production facility, implementing the latest in pork biotechnology. State-of-the-art pork production requires that nutrition, environment, and health are strictly controlled and monitored. Each of the four planned Circle Four complexes will be

composed of six composite farms. These large farm operations will be separated into these farming units with the associated hog populations: 1) a brood sow farm (with 4,800 animals), 2) a nursery farm (with 12,000 pigs), and 3) three finishing farms (each with 12,000 hogs).

About 50,000 acres have been acquired by Circle Four Farms for its combined farming operations. The Skyline Complex, which is west of Minersville and southwest of Milford, is in operation even as its construction continues. Construction should be complete in 1996 and, at full capacity, it will employ 227 persons. Construction will begin in late 1996 on the Blue Mountain Complex, which will be southwest of Skyline. When completed in 1998 it will employ 217 persons. The third operation, which will be southwest of the Skyline and southeast of the Blue Mountain in Iron County, will be the Nada Complex, which will be constructed in 1998 through 1999 and will ultimately employ 197 people. The Pinnacle Complex, which will be located in Beaver and Millard Counties, northeast of Milford, will be constructed beginning in 1999, and reach capacity in the year 2000, with 196 employees. Construction for all farms is expected to employ an average of about 260 persons through the year 2000.<sup>2</sup>

In addition to these farm operations, Circle Four Farms has indicated the possibility of establishing further pork processing facilities, including a slaughter house and additional meat processing operations, in the area; these are defined here as Scenarios 2 through 4. The company is proceeding very cautiously with respect to these meat processing facilities and the probability of their development is unknown. For discussion and analysis purposes,

Circle 4 Farms Operations Employment  
Four Scenarios



Circle 4 Farms Construction Employment  
Four Scenarios

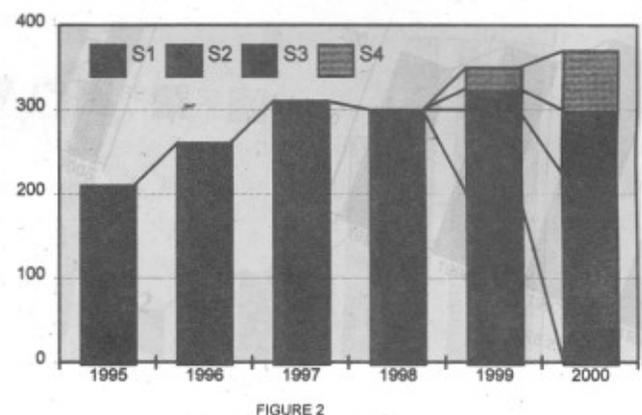


FIGURE 2

construction of these additional facilities is assumed to occur in 1999 through 2000. Employment for each of the phases of the processing facilities is expected to ramp up such that full capacity for all of the operations is reached in the year 2003.

Scenario 2 adds a slaughterhouse operation to Scenario 1; the product would be refrigerated pork rather than livestock. For this analysis the assumed location is just north of the Beaver and Iron County boundaries in Beaver County. The necessary additional construction workforce is expected to be 100 in 1999 and 225 in 2000. Operations would incrementally increase to 600 workers in 2003. This, in combination with the farming operation, would bring total steady state employment for Scenario 2 to 1,488.

The third scenario adds intermediate meat processing (without curing) to the operations of Scenario 2. The products shipped to market would be raw meat products such as uncooked pork chops, sausages, and so forth. For the purpose of this analysis, this facility is assumed to be located just south of the Beaver County and Iron County boundary in Iron County. There would be an additional 25 construction workers required in 1999 and 75 in 2000 as compared to Scenario 2. Full capacity would be reached in 2003 with an estimated 550 additional workers for this processing facility, bringing total employment for Scenario 3 to 2,038.

The fourth scenario would include full processing of all pork products. The output of the processing plant would be cured ham, cooked sausages, animal by-

products, and so forth. The additional construction workers required would be 25 in 1999 and 70 in 2000, as compared with Scenario 3. The additional processing operation would require 750 workers, bringing the total operating employment in Scenario 4 to 2,664. Again, the location for this potential development is unknown, but for the purposes of this analysis it is assumed to be north of Milford, in Beaver County.

Circle Four construction and operations employment for the different scenarios is shown in Figures 1 and 2.

## Population & Employment Impacts

### Summary Results

A development project of the magnitude of that proposed by Circle Four Farms will clearly have a significant impact on the southwest Utah area, particularly on Beaver and Iron Counties. This analysis is limited to the population and employment impacts of the direct employment associated with the project. Other impacts (e.g., transportation, environmental, fiscal, etc.) are considered elsewhere.<sup>3</sup> A summary of estimated population and employment impacts for the four Circle Four Scenarios is presented in Figures 3 and 4. These impacts account for the direct employment of the Circle Four Farms and the additional employment generated by the increase in people and economic activity in the area. For the year 2003, the estimated total population impact ranges from 3,204 (Scenario 1) to 9,047 (Scenario 4) and the total employment impact ranges from 1,562 (Scenario 1) to 4,690 (Scenario 4). These impacts are for the Southwest MCD.<sup>4</sup>

Circle 4 Farms Population Impacts  
Four Scenarios

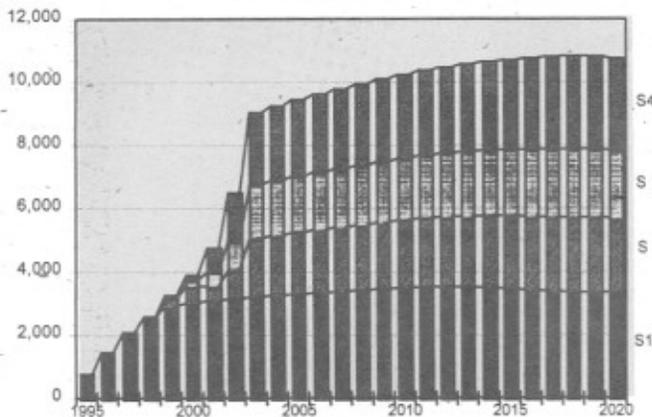


FIGURE 3

Circle 4 Farms Employment Impacts  
Four Scenarios

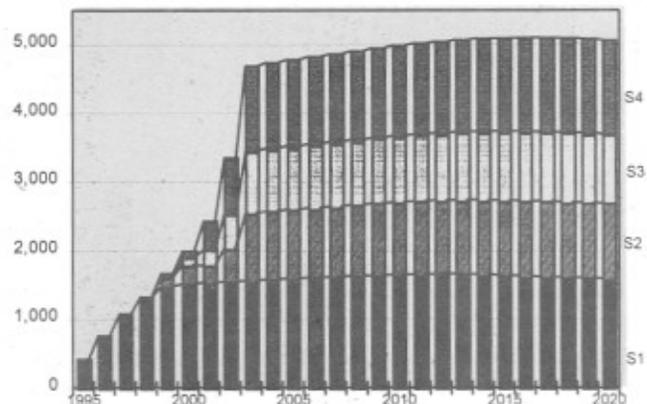


FIGURE 4

Estimates of the geographic distribution of the impacts have been generated as well. A summary of these is presented in Figures 5 through 8. In all scenarios, Iron County is expected to experience the largest absolute population impact, with between 50 and 60 percent of the total. Although the population impact will be smaller in Beaver county in numerical terms, as a share of its total population the impact will be much larger. It is estimated that the population impact for Beaver County in Scenario 1 will be 1,122 and in Scenario 4 will be 2,719 for the year 2005. Given that the 1994 population estimate for the county was 5,150, these are significant impacts. Employment impacts are concentrated in Beaver County, primarily because this is the county with the most of the Circle Four operations. The estimated employment impact for Beaver County for the year 2005 for Scenario 1 is 966 and for Scenario 4 is 3,236. Given that the estimated total employment for the county in 1994 was 2,066<sup>5</sup>, the Circle Four development could potentially increase the employment in the county by a factor of nearly 1.6.<sup>6</sup>

**Circle 4 Farms Development Scenarios  
County Employment Impacts for 2005**

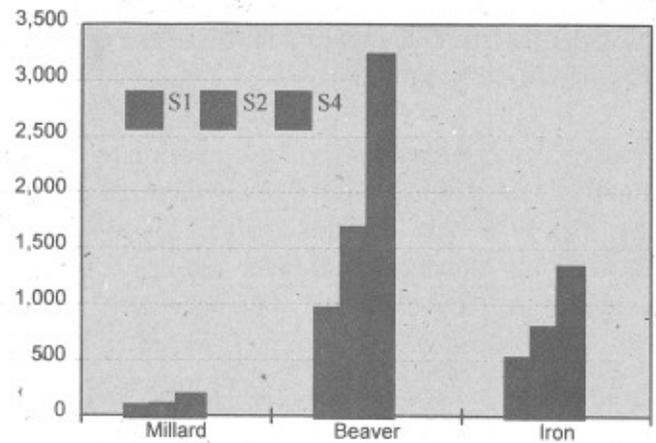


FIGURE 6

**Beaver County 2005 Population Impacts  
and 1994 Population Total**

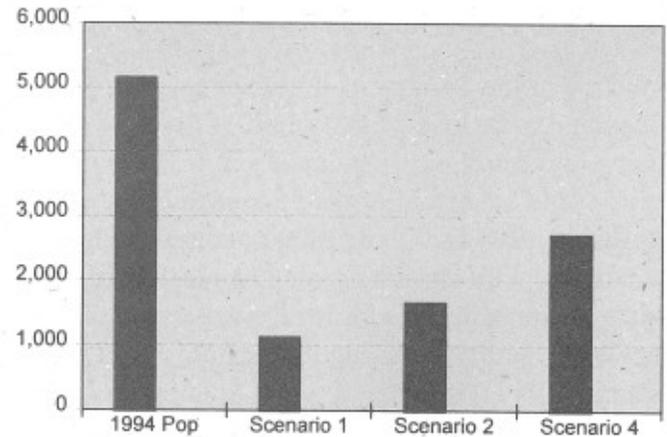


FIGURE 7

**Circle 4 Farms Development Scenarios  
County Population Impacts for 2005**

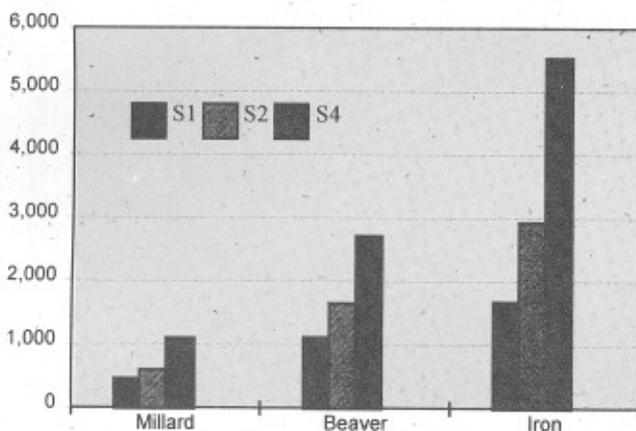


FIGURE 5

**Beaver County 2005 Employment Impacts  
and 1994 Employment Total**

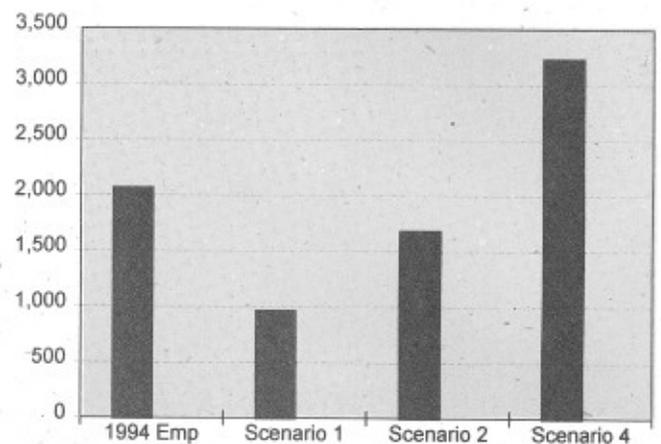


FIGURE 8

## Detailed Discussion of Scenario 1 Impacts

Space constraints in this publication preclude a full discussion of the results of this research. Detailed employment (by industry) and population (by single year of age and sex) impacts for future years have been generated for 29 communities and sub-county areas in the study area. To acquaint the reader with some of the logic and detail of the analysis, selected aspects of the results for Scenario 1 are presented here.

The Circle Four farm development will increase employment in the area. This employment will include the direct employment of the construction workers (many of whom will leave when the project construction is completed) and the employees of

Circle Four (agriculture and manufacturing, for example, food processing at the feed mill), as well as the residentiary employment that produces additional goods and services to supply the increased population. Table 1 presents the major industry distribution of the employment impacts over time. The growth of the workforce of the initial population is not adequate to meet the increased demand for labor resulting from the development. Employment induced in-migration to the area will, in consequence, occur. These new residents will include those taking the newly created jobs and others that are attached to them (dependents, partners, etc.). Table 2 presents the components of population change. In the early years rapid population increase results from a relatively large net in-migration.

**Table 1**  
**CIRCLE FOUR FARMS: Scenario 1 Impacts**  
**Employment Projections by Major Industry**  
**1995-2020**

	1995	1996	1997	1998	1999	2000	2005	2010	2015	2020
Agriculture	98	259	384	531	697	872	872	871	871	871
Mining	0	0	0	1	0	0	0	1	1	0
Construction	214	270	325	318	221	23	26	30	31	32
Manufacturing	4	7	31	34	38	39	40	41	40	39
TCPU	3	9	11	15	17	19	21	22	22	19
Trade	28	60	89	116	137	154	169	180	176	168
FIRE	5	10	16	18	22	25	28	29	27	26
Services	25	54	82	108	130	145	167	183	187	183
Government	29	65	97	125	145	161	182	198	193	166
Non-Farm	13	29	44	56	68	77	86	92	90	86
<b>Total Employment</b>	<b>419</b>	<b>763</b>	<b>1,079</b>	<b>1,322</b>	<b>1,475</b>	<b>1,515</b>	<b>1,591</b>	<b>1,647</b>	<b>1,638</b>	<b>1,590</b>
<b>Non-Ag W&amp;S Emp.</b>	<b>309</b>	<b>476</b>	<b>653</b>	<b>737</b>	<b>713</b>	<b>570</b>	<b>637</b>	<b>687</b>	<b>680</b>	<b>636</b>

Over time the size and age composition of the impact population will change through aging, births, mortality, and migration. Given the assumptions used in this analysis, this will result in population growth, a change in the age distribution, and, in consequence, a different composition of the demand for goods and services. Twenty five years into the future, the children of the original working age migrants will be entering the labor force and having their own children while the original in-migrants approach retirement age. The age-specific demand for goods and services will be affected and therefore the employment structure will change to accommodate this as well. Figures 9 and 10 are population pyramids that present aggregations of the single year of age by sex distribution of the impact population in the years 2000 and 2020. Figure 9 shows that the age groups with the highest propensity to migrate for employment are young working age persons and those attached to them. Figure 10 presents the impact population twenty years further into the future. In 2020 the

original working age in-migrants will be approaching retirement. The lower "bulge" in the population pyramid represents the children of the original in-migrants; these are entering the work force by 2020.

The aging of the impact population results in the increasing median age. Aggregation of the age distribution of the impact population over time reveals, among other things, that there will be 567 more school aged persons in the area in the year 2000 as a result of Scenario 1. In addition, the dependency ratio increases to 70 in the year 2013. After 2013 the dependency ratio begins to decline as a result of the entry of the children of the original in-migrants. In the later years the dependency ratio is relatively more affected by the retirement of the original employment-related migrants themselves.

Impact Population: Year 2000  
Scenario 1

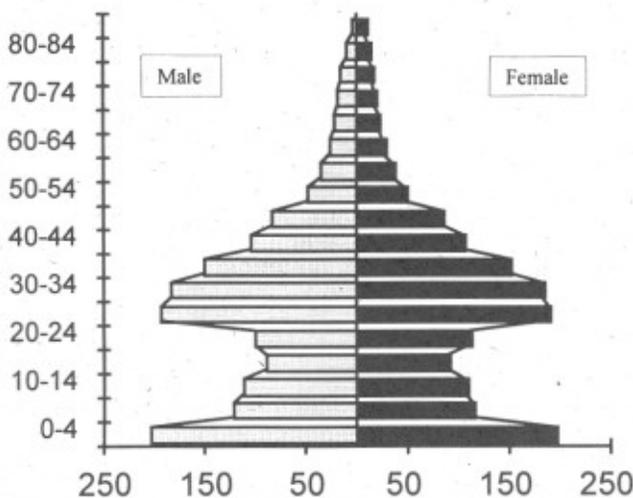


FIGURE 9

Impact Population: Year 2020  
Scenario 1

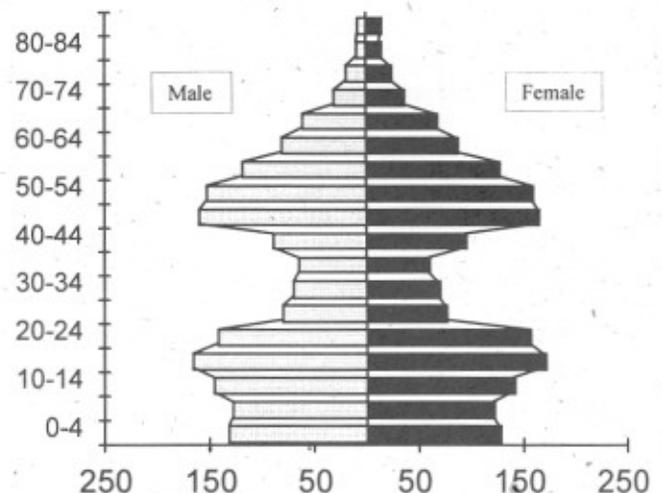


FIGURE 10

Table 2

**Components of Population Change: 1995-2020**  
**CIRCLE FOUR FARMS: Scenario 1 Impacts**

Year	Beginning Population	Births	Deaths	Natural Increase	Residual Migration	Ending Population	Percent Change
1995	0	0	0	0	767	767	0.00
1996	767	29	2	27	663	1,457	89.96
1997	1,457	51	5	46	588	2,091	43.51
1998	2,091	72	8	64	434	2,589	23.82
1999	2,589	85	8	77	246	2,912	12.48
2000	2,912	92	10	82	26	3,020	3.71
2001	3,020	90	10	80	(14)	3,086	2.19
2002	3,086	85	11	74	(15)	3,145	1.91
2003	3,145	81	12	69	(10)	3,204	1.88
2004	3,204	78	12	66	(18)	3,252	1.50
2005	3,252	74	12	62	(17)	3,297	1.38
2006	3,297	70	12	58	(19)	3,336	1.18
2007	3,336	68	12	56	(18)	3,374	1.14
2008	3,374	64	12	52	(14)	3,412	1.13
2009	3,412	63	14	49	(8)	3,453	1.20
2010	3,453	61	13	48	(10)	3,491	1.10
2011	3,491	59	14	45	(8)	3,528	1.06
2012	3,528	59	14	45	(39)	3,534	0.17
2013	3,534	57	14	43	(48)	3,529	(0.14)
2014	3,529	56	15	41	(67)	3,503	(0.74)
2015	3,503	54	15	39	(81)	3,461	(1.20)
2016	3,461	53	16	37	(78)	3,420	(1.18)
2017	3,420	54	16	38	(73)	3,385	(1.02)
2018	3,385	53	17	36	(60)	3,361	(0.71)
2019	3,361	56	18	38	(50)	3,349	(0.36)
2020	3,349	58	17	41	(39)	3,351	0.06

Table 3

**CIRCLE FOUR FARMS: Scenario 1 Impacts**  
**Population Projections By Selected Age Groups (1995-2020)**

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2010	2015	2020
0-4	64	139	218	292	351	396	420	429	426	413	396	317	267	258
5-17	133	281	410	500	554	567	588	622	665	710	755	920	930	740
18-29	219	399	550	651	687	657	610	564	525	489	453	425	448	581
30-39	174	307	435	542	623	665	694	714	724	729	734	594	353	262
40-64	145	263	376	478	556	592	627	668	712	757	804	1,057	1,257	1,230
65+	32	68	102	126	141	143	147	148	152	154	155	178	206	280
15-44	480	868	1,220	1,480	1,631	1,646	1,637	1,628	1,622	1,613	1,604	1,500	1,393	1,233
Total	767	1,457	2,091	2,589	2,912	3,020	3,086	3,145	3,204	3,252	3,297	3,491	3,461	3,351
Median	27	26	26	26	27	27	28	28	28	29	29	31	31	32
Dependency	43	50	54	55	56	58	60	62	63	65	66	68	68	62

**Table 4**  
**CIRCLE FOUR FARMS: Scenario 1 Impacts**  
**Dependency Ratios (1995-2020)**

	1995	2000	2005	2010	2015	2020
<b>Dependency Ratio</b>	43	58	66	68	68	62
<b>Pop 0-4 per 100 Pop age 18-64</b>	12	21	20	15	13	12
<b>Pop 5-17 per 100 Pop age 18-64</b>	25	30	38	44	45	36
<b>Pop 65+ per 100 Pop age 18-64</b>	6	7	8	9	10	14

## Endnotes

<sup>1</sup> This is the direct employment of Circle Four Farms and does not include employment associated with forward and backward linked industries. The trucking operation, possible feed purchases from Utah producers, and other similar indirect purchases are not included. It is too early to know which, if any, of these purchases will be made from Utah firms.

<sup>2</sup> For modeling purposes, all of the farming employment (and associated construction) except the Skyline Complex is assigned to Beaver County. The Skyline Complex is assigned to Iron County.

<sup>3</sup> The Division of Water Quality within the Department of Environmental Quality has evaluated and regulated the waste water impacts. A Beaver and Iron County transportation study is currently being prepared by a private engineering firm. A fiscal impact analysis of the project is being prepared by the Governor's Office of Planning and Budget in collaboration with the Department of Community and Economic Development.

<sup>4</sup> The Southwest Multi-County Planning District includes Beaver, Garfield, Iron, Kane, and Washington counties.

<sup>5</sup> This includes non-agricultural wage and salary employment, agricultural employment, and proprietors.

<sup>6</sup> The population and employment for Beaver County are given for 1994 because the Circle Four impacts began in 1995.

<sup>7</sup> The dependency ratio (DPR) is the ratio of the number of non-working age persons (those aged 17 and younger and those aged 65 and older) to the number of persons in working age (those aged 18 to 65).

# International Merchandise Exports in Utah

Merchandise exports from Utah companies to international markets reached a record year in 1995, totaling \$3.65 billion and increasing by 45.4 percent over the previous year. This record performance, in such a large industry, provides another important explanation for Utah's vibrant economic performance during 1995. Utah was a leader in the nation in job growth last year as the economy created 48,200 net new jobs. While analysts do not know what portion of these new jobs can be attributed to export growth, the Governor's Office of Planning and Budget estimates that 55,000 jobs in the state are directly and indirectly linked to the international merchandise export sector.

With a total value of \$3.65 billion, Utah's merchandise export sector is now more than two times the size of Utah's federal defense industry. Defense-related spending in 1994 amounted to \$1.51 billion. A comparison of the trends within the two industries demonstrates the changing composition of the Utah economy. Defense-related spending in Utah peaked in 1986 at \$2.6 billion and has now dropped to \$1.5 billion. In contrast, merchandise exports were first estimated in 1988 at \$943.3 million and have now increased to a record \$3.6 billion. In value terms, the decline in Utah's

defense industry has been more than offset by Utah's participation in global markets.

The 1995 increase in merchandise exports of 45.4 percent is the largest increase ever recorded since data began being compiled in 1988. The record increase means that over one billion dollars more money flowed into the state from exports in 1995 than in 1994. This money circulated within the economy helping to pay for compensation, liabilities, investment, savings and other categories of spending.

## Industry Composition of Utah's Exports

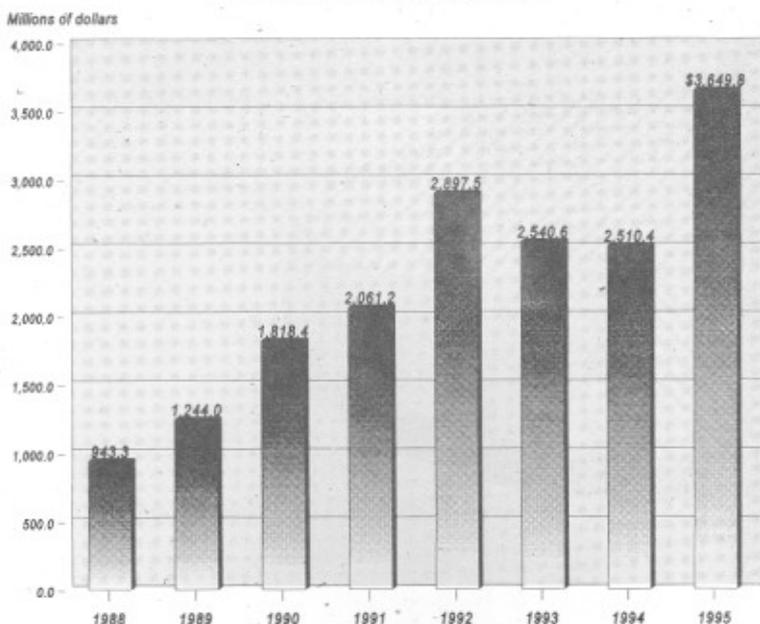
In 1995, primary metal products were 34.3 percent of the value of Utah's international merchandise exports. Other major export industries in 1995 were metallic ores (11.6 percent), electrical and electronic machinery (8.9 percent), industrial machinery (8.5 percent), and transportation equipment (6.8 percent). This composition is shown in the figure on Page 10 and the table on Page 11.

The largest contributors in terms of industries to the record year in 1995 were primary metal products, scrap and waste products, and metallic ores. Utah ranks second nationally in copper production. Copper prices increased from \$1.07 per pound in 1994 to \$1.35 per pound in 1995, helping to bolster the value of metallic exports.

## Destination of Utah's Exports

Utah's largest markets for merchandise exports are in eastern Asia, Canada, and Europe. In 1995 the top five destination countries for Utah's merchandise exports accounted for \$2.26 billion of the \$3.65 billion total, or 62.1 percent of total exports. Further, these top five destination markets purchased 59.4 percent of primary metal exports, 89.0 percent of coal exports, 35.5 percent of metallic ore exports, 28.1 percent of electrical and electronic machinery exports, 50.4 percent of instruments and related product exports, 67.1 percent of chemicals and allied products, and 50.5 percent of transportation equipment exports from Utah in 1995. Japan, Utah's third largest export market in 1994, was

Utah Merchandise Exports: 1988-1995



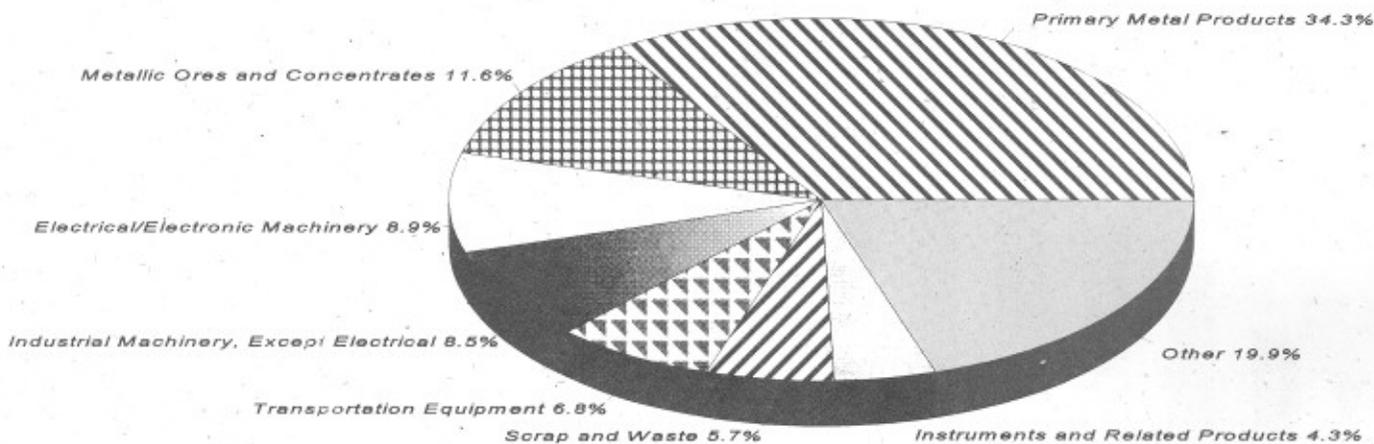
Source: U.S. Bureau of the Census Foreign Trade Division;  
and Massachusetts Institute for Social and Economic Research (MISER)

the state's largest export market in 1995. The great bulk of the \$555.6 million in purchases (26.0 percent or \$144.7 million) consisted of metallic ores and concentrates. The United Kingdom was the second largest market for Utah exports in 1995, purchasing a total of \$459.8 million of merchandise. Exports to the United Kingdom were disbursed across industries with significant purchases of primary metal products (71.2 percent or \$327.2 million), fabricated metal products (13.9 percent or \$64.0 million), industrial machinery (4.2 percent or \$19.2 million), electronic machinery (3.1 percent or \$14.1 million), and instruments and related products (1.9 percent or \$8.8 million). Canada was Utah's third largest merchandise export destination in 1995 and also had purchases distributed across a range of industries. Of the \$410.6 million total of Utah merchandise exports to Canada in 1995, \$73.4 million (17.9 percent) was transportation equipment, \$59.2 million (14.1 percent) was primary metal products, and \$50.5 million (12.3 percent), electronic machinery. France, Utah's seventeenth largest export market for 1994, was the fourth largest export market in 1995. About 65 percent (\$182.3 million) of this was scrap and waste products, 24.2 percent (\$68.2 million) was primary metal products, and 3.3 percent (\$9.3 million) was instruments and related products. Nearly two-thirds (63.4 percent) of Utah's exports to its fifth largest trading partner, China (Taiwan), was \$174.0 million of primary metal products.

### Limitations of These Export Data

The export data presented here have been generated by the U.S. Census Bureau, Foreign Trade Division and have been adjusted by the Massachusetts Institute for Social and Economic Research (MISER). The series, called "Origin of Movement," is designed to measure the transportation origin of exports, and accounts for the value of merchandise exports but not service exports. This means that exports of business services (such as financial services or computer software), educational services (such as international students paying tuition to purchase Utah education), tourist services (such as purchases made by international travelers in Utah), and other services sold in international markets are not included in the value of these exports. Further, data on international imports by state are not compiled, making it impossible to determine a balance of trade for Utah.

Utah Merchandise Exports by Industry: 1995



Source: U.S. Bureau of the Census Foreign Trade Division; and Massachusetts Institute for Social and Economic Research (MISER)

**Utah Merchandise Exports by Industry (thousands of dollars): 1988-1995**

SIG Code	Industry Description	1988	1989	1990	1991	1992	1993	1994	1995	% of	% CHG	% CHG	% CHG	% CHG
										1995 Total	1991- 1992	1992- 1993	1993- 1994	1994- 1995
1	Agricultural Products	\$278.6	\$1,687.1	\$1,864.1	\$1,477.2	\$1,057.6	\$2,900.1	\$4,229.1	\$1,992.7	0.1	-28.4	174.2	45.8	-52.9
2	Livestock and Livestock Products	501.8	562.0	153.6	98.4	173.8	486.4	87.4	576.2	0.0	76.6	179.9	-82.0	559.1
8	Forestry Products	189.0	32.2	52.5	5.0	74.2	23.3	43.3	48.6	0.0	1394.4	-68.7	86.4	12.1
9	Fishing, Hunting, and Trapping	3,521.2	213.2	572.0	732.4	334.7	1,279.3	1,097.7	2,583.2	0.1	-54.3	282.3	-14.2	135.3
10	Metallic Ores and Concentrates	15,668.7	213,167.4	209,220.6	196,613.3	282,205.1	224,861.2	283,769.2	424,845.9	11.6	43.5	-20.3	26.2	49.7
12	Bituminous Coal and Lignite	32,775.4	80,003.3	64,021.2	84,073.2	78,485.8	81,193.1	81,921.4	132,691.5	3.6	-6.6	3.4	0.9	62.0
13	Crude Petroleum and Natural Gas	0.0	0.0	0.0	2.6	0.0	0.0	0.0	7.4	0.0	0.0	0.0	0.0	0.0
14	Nonmetallic Minerals, Except Fuels	1,842.7	10,265.9	5,166.0	7,833.0	11,766.7	8,153.6	8,962.7	10,174.5	0.3	50.2	-30.7	9.9	13.5
20	Food and Kindred Products	33,230.1	53,931.7	57,903.5	54,963.2	60,006.5	74,419.4	72,801.8	136,959.4	3.8	9.2	24.0	-2.2	88.1
21	Tobacco Manufacturers	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
22	Textile Mill Products	1,577.8	2,240.1	2,162.2	1,644.9	1,590.6	2,107.2	2,836.0	3,062.3	0.1	-3.3	32.5	34.6	8.0
23	Apparel and Related Products	10,967.0	3,077.6	3,368.5	4,969.3	7,538.9	6,276.2	8,154.2	13,427.0	0.4	51.7	-16.8	29.9	64.7
24	Lumber and Wood Products, Except	572.9	594.7	1,687.3	947.0	3,098.8	917.0	894.3	1,976.9	0.1	227.2	-70.4	-2.5	121.1
25	Furniture and Fixtures	1,364.5	2,093.4	1,806.4	2,964.6	6,742.7	3,766.4	2,845.8	3,630.1	0.1	127.4	-44.1	-24.4	27.6
26	Paper and Allied Products	10,495.0	10,691.9	12,563.5	6,650.0	3,175.0	9,241.3	3,184.0	3,794.4	0.1	-52.3	191.1	-65.5	19.2
27	Printing, Publishing, and Allied Products	9,053.1	24,885.4	34,539.9	19,731.5	22,619.8	26,359.0	26,808.8	30,323.8	0.8	14.6	16.5	1.7	13.1
28	Chemicals and Allied Products	22,224.5	40,406.4	66,567.4	60,072.8	94,803.4	98,883.0	157,377.4	148,209.9	4.1	57.8	4.3	59.2	-5.8
29	Petroleum Refining and Related Products	2,124.7	530.6	3,925.5	758.8	289.5	454.7	108.4	253.4	0.0	-61.8	57.1	-76.2	133.7
30	Rubber and Misc. Plastic Products	27,050.7	11,242.0	9,675.8	23,318.5	8,724.5	11,544.2	14,732.0	30,061.9	0.8	-62.6	32.3	27.6	104.1
31	Leather and Leather Products	584.2	395.2	1,404.0	2,413.5	3,902.0	2,709.8	3,965.3	4,905.8	0.1	61.7	-30.6	46.3	23.7
32	Stone, Clay, Glass, and Concrete Products	7,366.1	3,366.5	3,676.3	3,552.2	5,477.2	8,610.0	4,702.8	4,780.2	0.1	54.2	57.2	-45.4	1.6
33	Primary Metal Products	200,209.8	95,443.0	322,645.9	616,094.1	1,313,756.9	931,868.6	915,393.7	1,252,373.5	34.3	113.2	-29.1	-1.8	36.8
34	Fabricated Metal Products, Except	21,653.2	33,571.1	36,721.2	65,105.2	62,682.0	51,831.0	38,392.7	106,340.8	2.9	-3.7	-17.3	-25.9	177.0
35	Industrial Machinery, Except Electrical	117,563.4	146,628.1	202,848.0	195,040.1	153,313.0	214,509.6	204,532.0	308,919.6	8.5	-21.4	39.9	-4.7	51.0
36	Electrical/Electronic Machinery	281,318.0	287,844.1	446,497.0	402,726.3	325,596.4	329,298.6	228,041.7	323,976.5	8.9	-19.2	1.1	-30.7	42.1
37	Transportation Equipment	25,825.0	68,319.4	144,321.3	140,653.5	277,191.4	253,965.1	214,563.0	248,791.5	6.8	97.1	-8.4	-15.5	16.0
38	Instruments and Related Products	85,323.9	116,766.7	128,715.6	109,561.9	111,647.5	124,175.8	141,979.5	156,699.0	4.3	1.9	11.2	14.3	10.4
39	Misc. Manufactured Commodities	18,348.1	19,649.8	22,642.4	31,033.1	39,975.9	47,299.8	67,586.0	77,294.2	2.1	28.8	18.3	42.9	-14.4
	Scrap and Waste	8,633.2	7,482.0	20,099.5	14,665.8	8,700.7	12,598.5	10,622.1	208,184.3	5.7	-40.7	44.8	-15.7	1859.9
	Used or Second-Hand Merchandise	451.1	66.1	4,653.4	2,871.5	1,001.9	1,871.5	1,608.1	4,594.5	0.1	-65.1	86.8	-14.1	185.7
	Special Classification Provisions	2,606.4	8,843.5	5,299.5	5,234.5	7,715.0	6,084.8	4,836.1	4,646.1	0.1	47.4	-21.1	-20.5	-3.9
	GDS Imported From Canada & Returned	0.0	0.0	3,101.8	5,433.7	3,811.6	2,848.8	4,389.3	3,671.8	0.1	-29.9	-25.3	54.1	-16.3
	Statistical Adjustment	0.0	0.0	569.5	0.0	0.0	4.2	0.0	0.0					
	<b>TOTAL</b>	<b>\$943,320.1</b>	<b>\$1,244,000.4</b>	<b>\$1,818,445.4</b>	<b>\$2,061,241.3</b>	<b>\$2,897,458.8</b>	<b>\$2,540,541.4</b>	<b>\$2,510,465.8</b>	<b>\$3,649,796.8</b>	<b>100.0</b>	<b>40.6</b>	<b>-12.3</b>	<b>-1.2</b>	<b>45.4</b>

Utah Merchandise Exports to Selected Countries (thousands of dollars): 1988 to 1995

Rank	Country	1988	1989	1990	1991	1992	1993	1994	1995	% of	% CHG	% CHG	% CHG	% CHG
										1995	1991-1992	1992-1993	1993-1994	1994-1995
1	Japan	\$77,782.7	\$257,319.9	\$210,624.8	\$211,503.0	\$315,343.6	\$313,588.3	\$353,372.2	\$555,628.5	15.2	49.1	-0.6	12.7	57.2
2	U.K.	61,267.9	70,707.0	130,598.1	366,163.4	450,659.2	79,709.7	63,369.9	459,829.0	12.6	23.1	-82.3	-20.5	625.6
3	Canada	209,526.1	183,645.5	430,093.0	303,256.0	361,432.4	362,147.6	360,681.3	410,620.3	11.3	19.2	0.2	-0.4	13.8
4	France	24,320.3	30,668.4	33,710.1	30,109.9	23,334.4	19,516.0	21,926.0	282,154.3	7.7	-22.5	-16.4	12.3	1186.8
5	China (Taiwan)	41,495.1	46,815.4	45,885.8	68,049.2	421,116.6	380,309.4	203,319.8	274,597.0	7.5	518.8	-9.7	-46.5	35.1
6	Hong Kong	10,778.8	15,645.5	55,429.4	131,887.4	417,473.7	223,950.8	463,716.0	267,629.2	7.3	216.5	-46.4	107.1	-42.3
7	Germany	59,402.5	59,061.3	115,135.6	119,862.5	103,195.9	166,260.9	197,784.3	201,090.1	5.5	-13.9	61.1	19.0	1.7
8	Korea (Republic)	65,823.1	86,556.0	121,126.2	89,940.4	114,535.9	63,535.2	94,484.5	167,580.6	4.6	27.3	-44.5	48.7	77.4
9	Switzerland	25,235.1	15,598.6	20,377.4	101,678.9	28,871.3	244,614.2	98,340.8	155,797.2	4.3	-71.6	747.3	-59.8	58.4
10	Belgium	13,862.2	51,909.8	38,469.5	23,238.8	25,478.0	34,228.4	85,052.2	134,067.5	3.7	9.6	34.3	148.5	57.6
11	Singapore	17,750.3	39,690.4	33,487.1	42,522.0	68,324.8	50,894.3	27,524.4	88,968.3	2.4	60.7	-25.5	-45.9	223.2
12	Netherlands	23,571.4	26,029.3	28,070.4	27,577.9	69,175.7	145,810.0	119,164.6	87,840.2	2.4	150.8	110.8	-18.3	-26.3
13	Thailand	100,516.3	92,671.0	163,010.4	162,290.2	104,182.8	71,509.5	51,686.6	72,138.8	2.0	-35.8	-31.4	-27.7	39.6
14	Mexico	50,985.2	31,758.3	40,081.8	39,340.2	26,609.7	51,301.4	112,413.5	71,738.3	2.0	-32.4	92.8	119.1	-36.2
15	Chile	1,767.0	5,110.9	8,003.4	11,300.5	12,177.9	17,797.0	17,987.0	69,044.5	1.9	7.8	46.1	1.1	283.9
16	Philippines	1,949.7	10,095.6	12,532.3	32,604.1	27,458.1	28,025.9	32,761.8	66,773.9	1.8	-15.8	2.1	16.9	103.8
17	Australia	15,186.8	24,604.7	30,566.0	28,420.1	42,526.2	31,615.0	29,646.0	37,031.9	1.0	49.6	-25.7	-6.2	24.9
18	China (mainland)	11,554.8	10,557.5	47,251.6	44,359.7	49,673.7	20,219.4	17,181.0	33,137.8	0.9	12.0	-59.3	-15.0	92.9
19	Ireland	4,187.8	3,659.6	5,532.7	6,559.0	7,541.6	16,510.0	22,294.3	24,805.6	0.7	15.0	118.9	35.0	11.3
20	Italy	9,659.9	14,562.5	34,905.4	16,722.1	20,324.3	12,584.3	13,015.8	17,280.8	0.5	-21.5	-38.1	3.4	32.8
21	Colombia	823.1	1,251.7	846.9	1,106.6	1,312.8	2,837.6	5,526.0	11,450.7	0.3	18.6	116.1	94.7	107.2
22	Russia	0.0	0.0	0.0	0.0	6,645.3	4,392.5	2,603.1	10,305.4	0.3	0.0	-33.9	-40.7	295.9
23	Malaysia	30,221.1	41,250.1	33,545.3	38,066.2	37,586.7	66,874.7	14,802.1	9,580.5	0.3	-1.3	77.9	-77.9	-35.3
24	Israel	0.0	5,291.1	31,983.1	10,509.7	5,001.2	6,617.7	3,432.2	8,629.5	0.2	-52.4	32.3	-48.1	151.4
25	Indonesia	1,450.2	2,912.2	2,270.9	2,999.7	4,593.2	5,478.7	6,359.5	8,500.7	0.2	53.1	19.3	16.1	33.7
26	Spain	13,982.4	7,966.9	11,144.3	23,656.0	27,290.3	8,587.8	6,284.2	8,184.5	0.2	15.4	-68.5	-26.8	30.2
27	Brazil	3,139.5	47,612.5	22,473.7	34,426.8	2,107.2	7,730.7	8,293.2	7,984.1	0.2	-93.9	266.9	7.3	-3.7
28	Dominican Republic	65.1	171.1	93.0	32.6	168.0	1,232.1	2,545.9	7,647.9	0.2	414.8	633.5	106.6	200.4
29	India	1,465.8	3,134.9	5,540.9	1,356.1	1,373.2	4,064.7	2,156.6	7,166.4	0.2	1.3	196.0	-46.9	232.3
30	New Zealand	2,139.1	3,523.4	3,733.9	6,524.9	7,866.1	6,468.8	7,804.6	6,555.8	0.2	20.6	-17.8	20.7	-16.0
31	Sweden	2,955.1	9,105.1	13,927.7	5,235.6	5,978.0	5,014.6	6,797.9	6,364.8	0.2	14.2	-16.1	35.6	-6.4
32	Austria	1,682.6	1,979.5	3,573.2	5,068.1	4,212.1	4,978.9	4,971.2	5,204.7	0.1	-16.9	18.2	-0.2	4.7
33	Norway	4,300.1	2,037.4	56.1	3,634.6	4,738.6	4,326.9	3,659.5	5,204.7	0.1	30.4	-8.7	-15.4	42.2
34	Peru	218.7	2,938.5	519.3	1,005.1	347.5	3,620.9	4,467.8	5,121.5	0.1	-65.4	942.1	23.4	14.6
35	Republic of S. Africa	3,167.7	3,178.9	4,922.0	5,220.2	3,883.4	3,603.6	2,877.4	4,482.8	0.1	0.0	-7.2	-20.2	55.8
36	Venezuela	2,655.6	1,355.6	2,101.6	2,433.8	3,683.0	2,511.5	2,507.8	3,488.7	0.1	51.3	-31.8	-0.1	39.1
37	Saudi Arabia	2,486.0	1,902.4	2,146.5	1,824.3	7,461.1	4,740.2	2,961.9	3,425.5	0.1	309.0	-36.5	-37.5	15.7
38	Denmark	1,950.8	2,846.9	2,983.5	2,736.9	2,521.5	3,136.7	3,795.1	2,226.8	0.1	-7.9	24.4	21.0	-41.3
39	Turkey	4,680.6	694.3	1,146.6	13,512.8	39,798.6	22,398.8	2,534.6	2,010.9	0.1	194.5	-43.7	-88.7	-20.7
40	United Arab Emirates	936.5	1,153.5	1,156.8	1,390.3	2,062.4	2,604.7	2,130.7	1,712.6	0.0	48.3	26.3	-18.2	-19.6
	Balance of Countries	38,376.6	27,027.0	69,389.7	43,115.6	39,392.9	35,192.1	28,232.6	46,794.4	1.3	-8.6	-10.7	-19.8	65.7
	Total (All Countries)	\$943,319.6	\$1,244,000.2	\$1,818,446.0	\$2,061,241.3	\$2,897,458.8	\$2,540,541.4	\$2,510,465.8	\$3,649,796.8	100.0	40.6	-12.3	-1.2	45.4

### Current Conditions

Utah's economy continues to exhibit strength above expectations. Survey data from the Bureau of Labor Statistics indicates that Utah's nonfarm job growth was 5.8 percent for May 1996 over May 1995. This 5.8 percent rate is much higher than the historic (1950-95) average job growth rate of 3.5 percent in Utah. The unemployment rate in Utah was 3.3 percent for May 1996, compared to 3.7 percent for May 1995. The national unemployment rate for May 1996 was 5.4 percent, compared to 5.5 percent for May 1995.

### Important Factors

Utah placed 2<sup>nd</sup> in the nation in total nonagricultural employment growth, and in manufacturing employment growth, for April 1996 over April 1995. Regional Financial Associates (RFA) forecast in June 1996 that Utah would continue to rank 2<sup>nd</sup> in the nation (behind Nevada) in 1996 employment growth.

Because of the large number of children in the state, Utah ranked near the bottom at 45<sup>th</sup> with a per capita personal income level of \$18,055 in 1995. This was 80 percent of the national level of 22,788. Still, Utah ranked 3<sup>rd</sup> in the nation in total personal income growth for 1995 over 1994. And, Utah ranked 3<sup>rd</sup> in the nation, at 29.6 percent, for per capita income growth for the 1990 to 1995 period.

### 1996 Forecast

The adjacent actual and estimated economic indicators table shows that total employment growth in Utah is expected to decrease slightly in 1996 to about 5.2 percent. These economic indicator forecasts were produced in May 1996 after the announcement by Micron in February 1996 that it would curtail construction on its \$2.5 billion computer chip factory indefinitely.

# Actual and Estimated Economic Indicators, Utah and the U.S.: May 1996

U.S. & UTAH INDICATORS	UNITS	1993 Actual	1994 Actual	1995 Forecast	1996 Forecast	1997 Forecast	% CHG 93-94	% CHG 94-95	% CHG 95-96	% CHG 96-97
<b>PRODUCTION &amp; SPENDING</b>										
U.S. Real Gross Domestic Product	Billion Chained \$92	6,383.8	6,604.2	6,736.3	6,891.2	7,035.9	3.5	2.0	2.3	2.1
U.S. Real Personal Consumption	Billion Chained	4,339.7	4,471.1	4,578.4	4,692.9	4,782.0	3.0	2.4	2.5	1.9
U.S. Real Bus. Fixed Investment	Billion Chained	836.4	921.1	977.3	1,023.2	1,057.0	10.1	6.1	4.7	3.3
U.S. Real Defense Spending	Billion Chained	354.9	336.9	320.1	308.2	296.2	-5.1	-5.0	-3.7	-3.9
U.S. Real Exports	Billion Chained	660.6	715.1	774.5	832.5	895.8	8.3	8.3	7.5	7.6
U.S. Industrial Production Index	1987=100	111.6	118.1	122.0	124.8	127.7	5.8	3.3	2.3	2.3
Utah Coal Production	Million Tons	21.7	24.4	25.1	27.3	28.0	12.4	2.6	9.1	2.5
Utah Oil Production	Million Barrels	21.8	20.7	20.0	18.8	18.0	-5.4	-3.2	-5.8	-4.3
Utah Natural Gas Production (Sales)	Billion Cubic Feet	137.9	161.0	164.3	177.4	192.4	16.8	2.1	8.0	8.5
Utah Copper Production	Million Pounds	676.8	683.6	646.0	624.0	630.0	1.0	-5.5	-3.4	1.0
<b>SALES &amp; CONSTRUCTION</b>										
U.S. New Auto and Truck Sales	Millions	13.9	15.0	14.7	15.0	15.0	7.9	-2.0	2.0	0.0
U.S. Housing Starts	Millions	1.29	1.45	1.36	1.41	1.41	12.4	-6.2	3.7	0.0
U.S. Residential Construction	Billion Dollars	251.8	287.7	289.7	300.7	310.9	14.3	-0.7	3.8	3.4
U.S. Nonresidential Structures	Billion Dollars	171.8	180.2	199.7	210.6	218.6	4.9	10.8	5.5	3.8
U.S. Retail Sales	Billion Dollars	2,072.6	2,227.8	2,341.4	2,453.8	2,564.2	7.5	5.1	4.8	4.5
Utah New Auto and Truck Sales	Thousands	68.8	75.9	77.6	81.5	83.5	10.3	2.2	5.0	2.5
Utah Dwelling Unit Permits	Thousands	17.8	19.5	21.6	22.5	21.5	9.3	11.0	4.2	-4.4
Utah Residential Permit Value	Million Dollars	1,504.4	1,704.1	1,854.6	1,935.0	1,860.0	13.3	8.8	4.3	-3.9
Utah Average Unit Value	Thousands	84.5	87.5	85.9	86.0	86.5	3.6	-1.9	0.2	0.6
Utah Nonresidential Permit Value	Million Dollars	463.7	766.5	832.7	1,350.0	853.2	65.3	8.6	62.1	-36.8
Utah Taxable Retail Sales	Million Dollars	10,994	12,097	13,080	14,257	15,398	10.0	8.1	9.0	8.0
<b>DEMOGRAPHICS &amp; SENTIMENT</b>										
U.S. Population (With Overseas)	Millions	258.2	260.9	263.8	266.7	269.3	1.0	1.1	1.1	1.0
U.S. Consumer Sentiment of U.S.	1966=100	83.7	92.2	93.7	91.7	90.5	10.2	1.7	-2.1	-1.3
Utah Fiscal Year Population	Thousands	1,866.0	1,916.0	1,959.0	2,000.0	2,042.0	2.7	2.2	2.1	2.1
Utah Fiscal Year Net Migration	Thousands	17.4	22.8	15.1	13.0	14.0	na	na	na	na
Utah Consumer Sentiment of Utah	1966=100	95.8	106.1	105.9	105.1	103.7	10.7	-0.1	-0.8	-1.3
<b>PROFITS &amp; PRICES</b>										
U.S. Corp. Profits Before Tax	Billion Dollars	464.3	528.2	600.6	652.2	684.8	13.8	13.7	8.6	5.0
U.S. Domestic Profits Less F.R.	Billion Dollars	372.0	436.0	472.3	536.5	572.4	17.2	8.3	13.6	6.7
U.S. Oil Ref. Acquis. Cost	\$ Per Barrel	16.4	15.5	17.2	17.7	17.7	-5.4	10.9	2.4	0.2
U.S. Coal Price Index	1982=100	96.0	96.7	95.1	95.3	97.4	0.7	-1.7	0.3	2.2
U.S. Steel Scrap	\$ Per Metric Ton	112.4	132.5	135.0	136.0	137.0	17.9	1.9	0.7	0.7
Utah Coal Prices	\$ Per Short Ton	21.2	20.1	19.1	19.4	19.8	-5.2	-4.8	1.7	1.6
Utah Oil Prices	\$ Per Barrel	17.5	16.4	17.7	18.1	18.1	-6.3	8.1	2.0	0.2
Utah Natural Gas Prices	\$ MCF	1.85	1.53	1.15	1.18	1.20	-17.3	-24.8	2.6	1.7
Utah Copper Prices	\$ Per Pound	0.85	1.07	1.35	1.14	1.05	25.9	26.2	-15.6	-7.9
<b>INFLATION, MONEY &amp;</b>										
U.S. CPI Urban Consumers	1982-84=100	144.6	148.3	152.5	156.6	161.0	2.6	2.8	2.7	2.8
U.S. GDP Implicit Deflator	1987=100	102.6	104.9	107.5	110.1	112.9	2.2	2.5	2.4	2.5
U.S. Money Supply (M2)	Billion Dollars	3,457.3	3,505.7	3,579.3	3,751.1	3,912.4	1.4	2.1	4.8	4.3
U.S. Real M2 Money Supply (GDP)	Billion 1987\$	3,369.7	3,341.9	3,328.9	3,406.9	3,466.8	-0.8	-0.4	2.3	1.8
U.S. Federal Funds Rate	Percent	3.02	4.20	5.84	5.28	5.25	na	na	na	na
U.S. Bank Prime Rate	Percent	6.00	7.14	8.83	8.27	8.25	na	na	na	na
U.S. Prime Less Federal Funds	Percent	2.98	2.94	2.99	2.99	3.00	na	na	na	na
U.S. Prime Less CPI-U	Percent	3.00	4.58	6.00	5.57	5.45	na	na	na	na
U.S. 3-Month Treasury Bills	Percent	3.00	4.25	5.49	5.06	5.13	na	na	na	na
U.S. T-Bond Rate, 30-Year	Percent	6.60	7.37	6.86	6.70	6.61	na	na	na	na
U.S. Mortgage Rates, Fixed FHLMC	Percent	7.3	8.4	8.0	7.7	7.6	na	na	na	na
<b>EMPLOYMENT, WAGES,</b>										
U.S. Establishment Employment	Millions	110.7	114.0	116.6	118.3	119.8	3.0	2.3	1.4	1.3
U.S. Average Establishment Wage	Dollars	26,361	26,939	27,794	28,717	29,647	2.2	3.2	3.3	3.2
U.S. Total Wages & Salaries	Billion Dollars	2,919	3,072	3,241	3,396	3,553	5.2	5.5	4.8	4.6
U.S. Personal Income	Billion Dollars	5,364	5,649	5,966	6,258	6,546	5.3	5.6	4.9	4.6
U.S. Unemployment Rate	Percent	6.8	6.1	5.6	5.6	5.6	na	na	na	na
Utah Nonagricultural Employment	Thousands	809.7	859.6	907.8	955.0	994.2	6.2	5.6	5.2	4.1
Utah Average Nonagriculture Wage	Dollars	21,874	22,407	23,238	24,055	24,956	2.4	3.7	3.5	3.7
Utah Total Nonagriculture Wages	Million Dollars	17,711	19,262	21,096	22,974	24,811	8.8	9.5	8.9	8.0
Utah Personal Income	Million Dollars	30,415	32,763	35,561	38,582	41,730	7.7	8.5	8.4	8.1
Utah Unemployment Rate	Percent	3.9	3.7	3.6	3.3	3.2	na	na	na	na

# Utah State, Business & Industry Data Center Network

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The Demographic and Economic Analysis (DEA) section manages, analyzes, and disseminates economic, demographic, and fiscal data in order to contribute to improved planning, budgeting, and policy-making in Utah state government. As part of this mission, DEA functions as the lead agency in Utah for the Bureau of the Census' State Data and Business and Industry Data Center (SDC/BIDC) programs. While the 36 SDC and BIDC affiliates listed in this newsletter have specific areas of expertise, they can also provide assistance to data users in accessing Census and other data sources. If you would like a free subscription to this quarterly newsletter, call DEA at (801) 538-1036. This newsletter is available on the GOPB On-Line BBS, accessible via the State of Utah wide area network or by calling (801) 538-3383 or (800) 882-4638. GOPB maintains a world wide web home page at <http://www.gvnfo.state.ut.us/gopb> and DEA maintains a home page at <http://www.gvnfo.state.ut.us/dea>.