

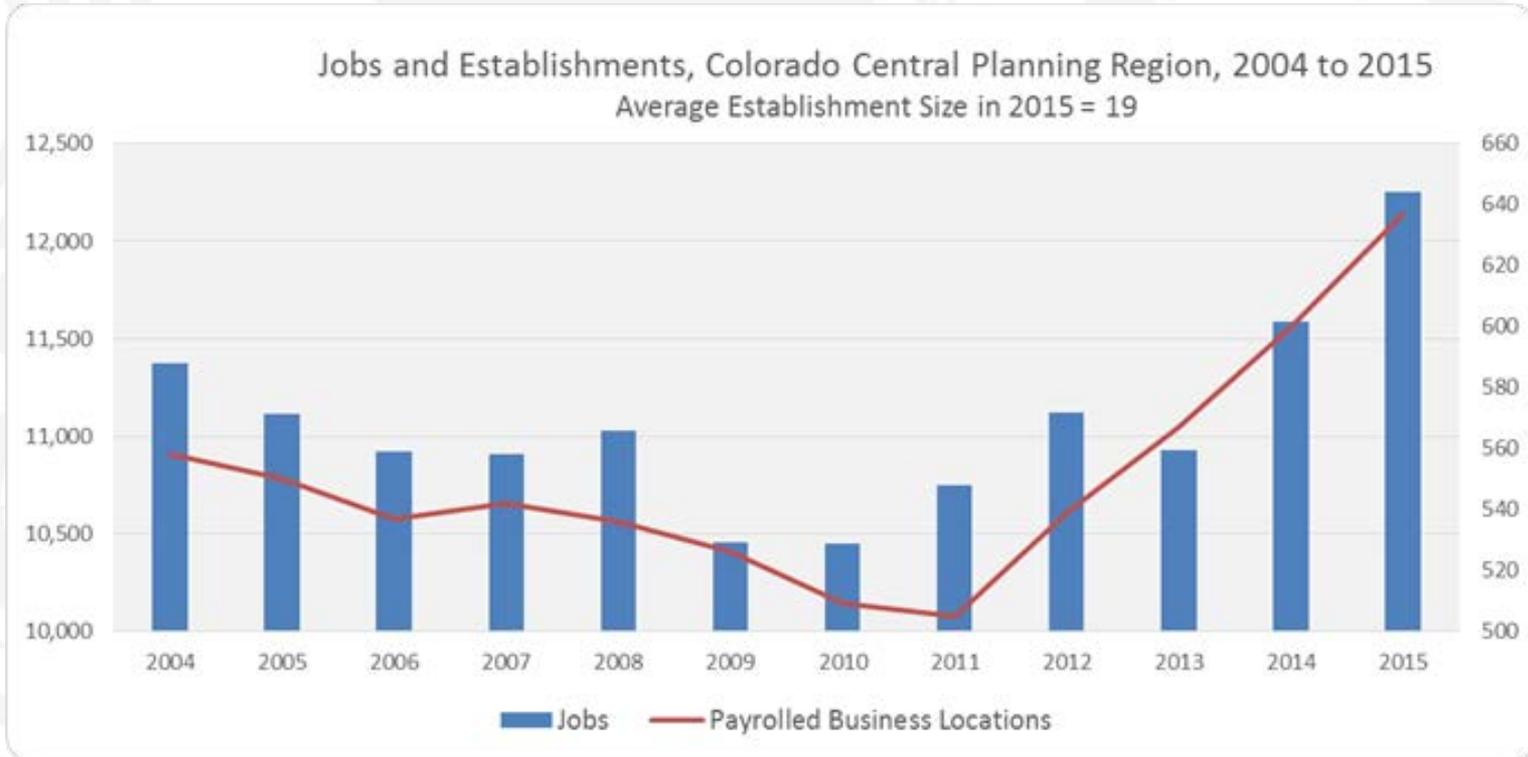
The logo for the Arapahoe/Douglas Workforce Board is centered in a white circle. It features a stylized blue wave above the text "Arapahoe/Douglas" in a serif font, with "WORKFORCE BOARD" in a bold, sans-serif font below it. The background of the slide is a dark blue with a repeating pattern of concentric circles and the text "Arapahoe/Douglas Works! Arapahoe/Douglas Works! Arapahoe/Douglas Works!" in a lighter blue, curved font.

Arapahoe/Douglas
WORKFORCE BOARD

Beverage Industry Overview

December 1, 2016

Historical Trends



The average establishment size has stayed stable, moving from 20 people in 2004 down to 19 people in 2015. Notice how the recent recession affected the industry group, with the upward trend not beginning until 2011, then steeply trending upward.

Beverage Industry Projections

Regional Industry Growth Projections, Colorado Central Planning Region

NAICS Code	Description	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs	2020 Jobs	Change	Annual Growth Rate	National Location Quotient	Payrolled Business Locations
312111	Soft Drink Manufacturing	1,393	1,370	1,350	1,333	1,318	(75)	(1.1%)	1.57	13
312112	Bottled Water Manufacturing	193	191	190	188	187	(6)	(0.6%)	0.98	6
312113	Ice Manufacturing	69	68	66	65	64	(5)	(1.4%)	0.69	3
312120	Breweries	4,482	4,502	4,514	4,522	4,527	45	0.2%	6.71	110
312130	Wineries	194	210	223	234	243	49	5.0%	0.25	23
312140	Distilleries	171	187	201	212	222	51	6.0%	1.08	19
722410	Drinking Places (Alcoholic Beverages)	6,468	6,557	6,642	6,725	6,805	337	1.0%	1.38	464
	Totals	12,969	13,084	13,187	13,280	13,366	397	0.6%		637

Source: EMSI 2016.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed Class of Worker

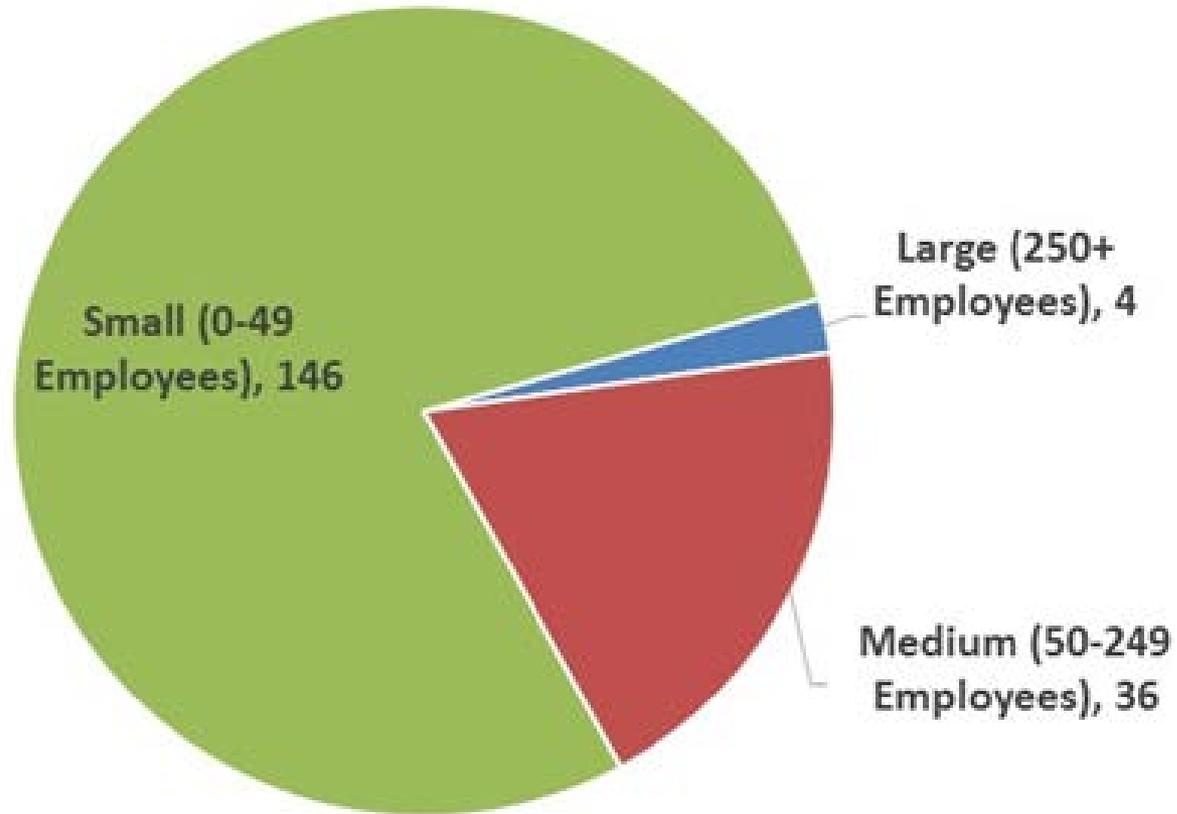
Regional Industry Growth Projections, Arapahoe/Douglas Workforce Development Area

NAICS Code	Description	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs	2020 Jobs	Change	Annual Growth Rate	National Location Quotient	Payrolled Business Locations
312111	Soft Drink Manufacturing	201	198	195	192	190	(11)	(1.1%)	0.89	1
312112	Bottled Water Manufacturing	0	0	0	0	0	0	N/A	0.00	0
312113	Ice Manufacturing	0	0	0	0	0	0	N/A	0.00	0
312120	Breweries	236	258	276	292	305	69	5.8%	1.39	16
312130	Wineries	18	19	21	22	23	5	5.7%	0.09	4
312140	Distilleries	<10	<10	<10	<10	<10	Insf. Data	N/A	0.15	1
722410	Drinking Places (Alcoholic Beverages)	854	841	831	824	819	(35)	(0.8%)	0.72	74
	Totals	1,309	1,316	1,324	1,331	1,338	28	0.4%		96

Source: EMSI 2016.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed Class of Worker

Most Companies are Small

Number Craft Breweries by Size,
Colorado Central Planning Region



The Top 20 Jobs in the Beverage Industry

Sector Staffing Patterns, Colorado Central Planning Region								
SOC Code	Description	2016 Jobs	2020 Jobs	Change	% Change	% of Industry	Median Hourly Earnings	Typical Entry Level Education
35-3011	Bartenders	2,845	3,027	182	6%	21.9%	\$9.12	No formal educational credential
35-3031	Waiters and Waitresses	1,436	1,496	60	4%	11.1%	\$9.03	No formal educational credential
51-9111	Packaging and Filling Machine Operators and Tenders	696	707	11	2%	5.4%	\$13.13	High school diploma or equivalent
51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	568	572	4	1%	4.4%	\$23.32	High school diploma or equivalent
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	414	414	0	0%	3.2%	\$27.80	High school diploma or equivalent
35-2014	Cooks, Restaurant	391	413	22	6%	3.0%	\$11.12	No formal educational credential
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	349	350	1	0%	2.7%	\$16.25	High school diploma or equivalent
41-2031	Retail Salespersons	285	292	7	2%	2.2%	\$10.84	No formal educational credential
33-9032	Security Guards	281	299	18	6%	2.2%	\$13.44	High school diploma or equivalent
49-9041	Industrial Machinery Mechanics	262	280	18	7%	2.0%	\$25.55	High school diploma or equivalent
11-1021	General and Operations Managers	233	238	5	2%	1.8%	\$52.07	Bachelor's degree
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	231	232	1	0%	1.8%	\$12.20	No formal educational credential
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	220	215	(5)	(2%)	1.7%	\$12.53	No formal educational credential
53-7051	Industrial Truck and Tractor Operators	195	194	(1)	(1%)	1.5%	\$16.18	No formal educational credential
53-3031	Driver/Sales Workers	189	189	0	0%	1.5%	\$10.30	High school diploma or equivalent
53-3032	Heavy and Tractor-Trailer Truck Drivers	180	180	0	0%	1.4%	\$20.85	Postsecondary nondegree award
43-5081	Stock Clerks and Order Fillers	179	180	1	1%	1.4%	\$12.44	No formal educational credential
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	176	185	9	5%	1.4%	\$9.05	No formal educational credential
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	162	167	5	3%	1.2%	\$9.38	No formal educational credential
53-3033	Light Truck or Delivery Services Drivers	152	153	1	1%	1.2%	\$14.80	High school diploma or equivalent

Source: EMSI 2016.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed Class of Worker

The Front Range is a national hub for the beverage industry, particularly breweries. The sector offers ample opportunities for entrepreneurs. It also provides career opportunities that do not demand high levels of education.