



PINAL COUNTY

Innovative Workforce Solutions

Pinal County
Transportation and
Warehousing Industry

2021 Asset Inventory

Transportation and Warehousing Industry

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Introduction and Technical Notes

This document inventories the workforce-related assets that support the transportation and warehousing industry in Pinal County. It estimates both the incumbent workforce and the talent pipeline to provide perspective on the capacity of the region to support the human capital needs of an employer from within this sector.

The Employers

The analysis of the incumbent workforce relies on public labor market data, specifically the United States Bureau of Labor Statistics' Quarterly Census of Employment and Wages. To provide the most relevant labor market data possible, this report looks at all the Pinal County businesses classified under the codes 48-49 Transportation and Warehousing, which includes the following component industries:

- 481: Air Transportation
- 482: Rail Transportation
- 483: Water Transportation
- 484: Truck Transportation
- 485: Transit and Ground Passenger Transportation
- 486: Pipeline Transportation
- 487: Scenic and Sightseeing Transportation
- 488: Support Activities for Transportation

The Incumbent Workforce

Employers in the Transportation and Warehousing industry employ approximately 1,700 workers in Pinal County. Truck Transportation is the largest component of the industry with 788 jobs. Transit and Ground Passenger Transportation (290 jobs) and Couriers and Messengers (253) are also top employers.

The Emerging Workforce

The education and workforce development systems are key to the success of this industry, and this document seeks to quantify the levels of talent emerging from relevant postsecondary programs of study, as well as other non-college training and development programs and targeted efforts of the business community that are contributing to the success of the Transportation and Warehousing sector in Pinal County.

Infrastructure and Supply Chain

Finally, the document looks at the distribution of the industry across the region and the proximity of businesses that are typically found in the supply chains of businesses within this sector.

It is hoped that this report will provide clear and practical perspective on the resources, partners and infrastructure that could support a regional employer from the transportation and warehousing sector.

The Employers

Employment by Industry

Approximately 1,700 people are employed in Transportation and Warehousing sector in Pinal County's 105 establishments. Looking at the detailed industries that make up the sector, we find Local Trucking companies, Long Distance Trucking Companies and Couriers/Express Delivery Services making up the bulk of the region's industry.

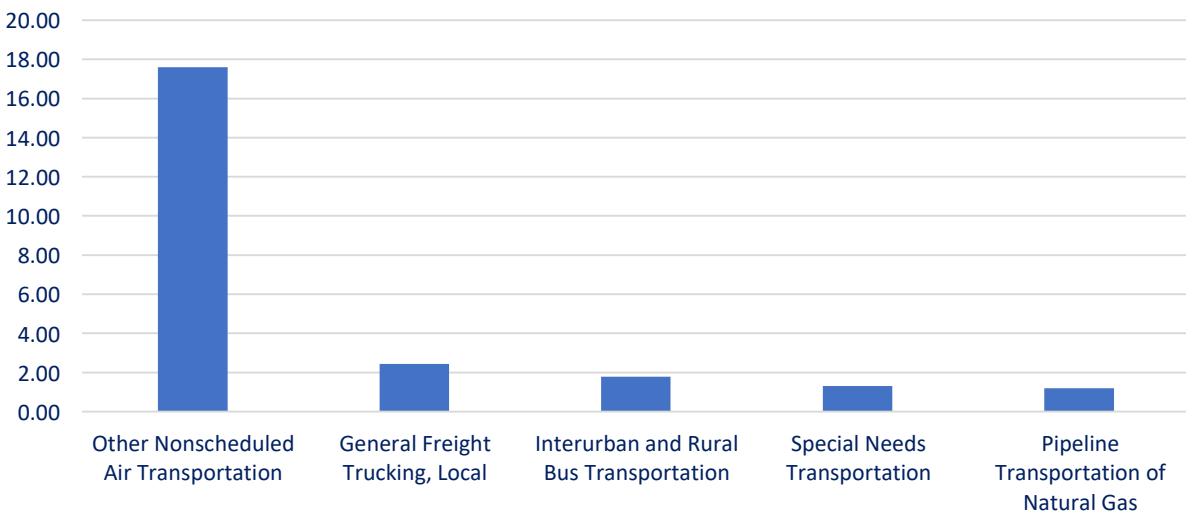
Table 1: Transportation and Warehousing Industries, Pinal County

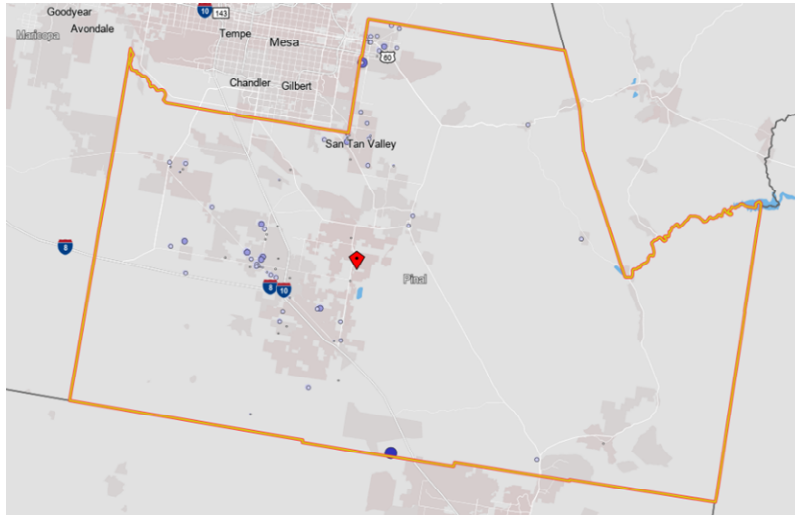
Description	2020 Establishments	2021 Jobs	Average Wages
General Freight Trucking, Long-Distance, Truckload	19	212	\$57,866
General Freight Trucking, Local	17	418	\$53,807
Specialized Freight (except Used Goods) Trucking, Local	14	110	\$49,840
Motor Vehicle Towing	12	50	\$35,644
Other Support Activities for Air Transportation	5	38	\$53,083

One method by which the scope of an industry is evaluated is an employment location quotient. This is a scaled value that measures the rate at which the population is employed in a certain industry to the national average. If the rate at which the population of the region works in the target industry is exactly equal to the national average, the location quotient would be 1.0. If it were double the national rate, it would be 2.0.

In Pinal County, a few industries from within the Transportation and Warehousing sector are unusually concentrated, employing significantly more than would be expected in a community of this size.

Industries by Location Quotient, Top Five, Pinal County





Employers in the Transportation and Logistics sector are spread across the county, although concentrations can be found in the city of Casa Grande, and along the I-10 corridor.

Employment by Occupation

In evaluating employment in specific occupations, it is important to understand that many of the occupations most commonly employed by organizations in the transportation and logistics industry are also employed in other industries, particularly in retail trade, government and facilities support services.

Table 2: Occupations Employed by the Transportation and Warehousing Industry, Pinal County

Occupation	% of Industry Jobs	Regional Jobs	Median Wages
Heavy and Tractor-Trailer Truck Drivers	31.8%	1,020	\$44,937
Passenger Vehicle Drivers	15.3%	535	\$27,626
Laborers and Freight, Stock, and Material Movers, Hand	9.4%	995	\$29,939
Light Truck Drivers	6.9%	379	\$35,045
Couriers and Messengers	3.1%	67	\$28,983
Supervisors-Transportation and Material Moving Workers	2.4%	256	\$51,425
Dispatchers, Except Police, Fire, and Ambulance	1.7%	86	\$34,093
General and Operations Managers	1.3%	926	\$89,127
Industrial Truck and Tractor Operators	1.3%	204	\$35,607
Bus and Truck Mechanics and Diesel Engine Specialists	1.2%	117	\$43,603
Sales Representatives of Services	1.2%	328	\$51,177
Aircraft Mechanics and Service Technicians	1.0%	46	\$68,953
Cargo and Freight Agents	0.8%	17	\$38,382
Postal Service Mail Carriers	0.8%	142	\$47,701
Bus Drivers, Transit and Intercity	0.7%	103	\$41,227
Shipping, Receiving, and Inventory Clerks	0.7%	205	\$33,721
Stockers and Order Fillers	0.7%	1,605	\$29,661
Transportation, Storage, and Distribution Managers	0.7%	59	\$84,689

Employers who have posted large numbers of openings for these jobs in recent years include:

- C.R. England
- CRST International
- System TWT Transportation
- Werner Enterprises
- Uber Eats
- Postmates
- Roehl Transport
- R. E. Garrison Trucking
- Trans-System

The Supply Chain

Physical proximity to the supply chain on which a business relies is more important in some industries than others. The industries which most often support a business in the Transportation and Warehousing sector can definitely be found in abundance in Pinal County.

Table 3: Transportation and Warehousing Supply Chain, by Dollars Spent In-Region, Pinal County

Description	In Region Purchases	Establishments	Location Quotient
Couriers and Express Delivery Services	\$5,127,376	N/A	N/A
Automotive Repair and Maintenance	\$4,209,197	77	0.9
Commercial/Industrial Machinery/Equipment Rental/Leasing	\$3,721,363	N/A	N/A
Gasoline Stations	\$3,398,638	65	2.2
Freight Transportation Arrangement	\$3,299,373	5	0.5
General Freight Trucking	\$3,205,894	36	1.2
Support Activities for Air Transportation	\$3,042,826	5	0.4
Federal Government, Civilian	\$2,196,924	N/A	N/A
Employment Services	\$2,062,901	29	0.5

The Talent Pipeline

Overview

The talent development ecosystem in Pinal County provides a steady pipeline of trained workers for the highest-demand occupations in the Transportation and Warehousing sector. A number of community colleges contribute to the region's talent pipeline with programs ranging from Logistics, Materials and Supply Chain management to Commercial Vehicle Operators. ARIZONA@WORK Pinal County provides career services and training programs to eligible jobseekers via training partners in the community.

Postsecondary Education

Thirteen institutions of higher learning are in the proximity of Pinal County, and two of them offer Transportation and Material Handling Programs.

Table 4: Awards, Transportation and Material Handling, by Institution, 2019

Institution	All Programs		Transportation and Material Moving Programs		Mechanic and Repair Technologies	
	Certificates Below a Bachelor's Degree	Associate's Degree	Certificates Below a Bachelor's Degree	Associate's Degree	Certificates Below a Bachelor's Degree	Associate's Degree
Central Arizona College	804	523	29	7	1	6
Chandler-Gilbert Community College	1,395	1,271	-	-	186	9
Mesa Community College	2,230	2,131	-	-	73	29
Pima Community College	3,005	2,257	54	-	337	41
Eastern Arizona College	791	551	-	-	216	20

*National Center for Education Statistics
Integrated Postsecondary Educational Data System*

Table 5: Completions, Relevant Programs of Study, Eastern Arizona College

Program	Certificates Below a Bachelor's Degree	Associate's Degree	Total
Heating, Air Conditioning Ventilation & Refrigeration Maintenance Technology	161	12	173
Appliance Installation and Repair Technology	43	0	43
Vehicle Maintenance and Repair Technology	6	0	6
Automobile/Automotive Mechanics Technology	3	5	8
Industrial Electronics Technology	3	2	5

*National Center for Education Statistics
Integrated Postsecondary Education Data System*

Table 6: Completions, Relevant Programs of Study, Chandler-Gilbert Community College

Program	Certificates Below a Bachelor's Degree	Associate's Degree	Total
Mechanic and Repair Technologies/Technicians, Other	69	9	78
Aircraft Powerplant Technology/Technician	69	0	69
Airframe Mechanics and Aircraft Maintenance Technology/Technician	42	0	42
Airline/Commercial/Professional Pilot and Flight Crew	1	12	13

*National Center for Education Statistics
Integrated Postsecondary Education Data System*

Table 7: Completions, Relevant Programs of Study, Mesa Community College

Program	Certificates Below a Bachelor's Degree	Associate's Degree	Total
Automobile/Automotive Mechanics Technology	73	15	88
Heavy Equipment Maintenance Technology	0	14	14

*National Center for Education Statistics
Integrated Postsecondary Education Data System*

Table 8: Completions, Relevant Programs of Study, Pima Community College

Program	Certificates Below a Bachelor's Degree	Associate's Degree	Total
Industrial Electronics Technology/Technician	187	1	188
Airframe Mechanics and Aircraft Maintenance Technology/Technician	33	34	67
Ground Transportation, Other	52	0	52
Aircraft Powerplant Technology/Technician	40	0	40
Mechanic and Repair Technologies/Technicians, Other	40	0	40
Automobile/Automotive Mechanics Technology/Technician	13	6	19
Industrial Mechanics and Maintenance Technology/Technician	14	0	14
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology	7	0	7
Avionics Maintenance Technology/Technician	3	0	3
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	2	0	2

*National Center for Education Statistics
Integrated Postsecondary Education Data System*

ARIZONA@WORK

Arizona’s Eligible Training Provider List identifies five providers who offer programs related to the Transportation and Logistics Sector and who are approved for funding under the Workforce Innovation and Opportunity Act:

- Pima Community College
- Load Training, LLC
- New Horizons of Phoenix
- EII - Images Enterprises LLC
- Arizona Flight Training Center

The programs offered by each organization are outlined here.

Table 9: ARIZONA@WORK Eligible Training Providers, Transportation and Logistics, Pinal County

Institution	Program
Pima Community College	Logistics and Supply Chain Management (AA)
Pima Community College	Logistics and Supply Chain Management (Certificate)
Load Training, LLC	Freight Broker Training (Diploma)
Eii-Images Enterprises	Forklift Operator Training (Certificate)
Eii-Images Enterprises	Forklift Standup Training (Certificate)
Arizona Flight Training Center	Airline Transport Pilot (Certificate)

Arizona Department of Economic Security