SAMPLE OF OUR 88-PAGE REPORT

U.S. PLASTICS INDUSTRY LABOR TRENDS 2013

ANALYSIS OF EDUCATION, TRAINING AND WORKFORCE DEVELOPMENT

This report highlights various workforce-related strategies and features in-depth analysis of manufacturing labor trends in the United States, including growth performance in 2012 and a forecast for 2013 and beyond.

Our analysts provide insight into trends that impact labor growth in the United States, including:

- Recruiting & retention
- Training & education
- Right-to-work & unionization
- Social media in recruiting
- Military veterans as a talent pool
- The manufacturing skills gap
- Contingent workers
- Managing Gen Y workers
- Women in manufacturing

A special section includes content from the Society of the Plastics Industry Inc., including detailed data about plastics industry employment trends (by industry segment, by state), plus a directory of more than 150 U.S. colleges offering plastics- and manufacturing-relevant programs.

The report also offers perspectives from industry thought leaders regarding their views on labor trends, the skills gap, millennials, social media and women in manufacturing. These Q&A interviews include:

- Dr. Peter Cappelli, professor at Wharton School, University of Pennsylvania
- Howard W. Coleman, principal, MCA Associates
- Allison Grealis, program director, Women in Manufacturing
- Jeannine Kunz, dir. of mktg. & prof. development, Society of Manufacturing Engineers
- Eric Schwartzman, president/CEO, Social Media Compliance Training Inc.
- Michael Taylor, sr. director - international affairs & trade, SPI

Plastics News Reports

Plastics News

1725 Merriman Road
Akron, OH, 44313-5283
United States
Phone: +1-330-836-9180
Fax: +1-330-836-2322
Web: www.plasticsnews.com

Vice President/Publisher
Anthony J. Eagan
aeagan@crain.com

Editorial Director/Associate Publisher
Robert Grace
rgrace@crain.com

Editor
Donald Loepp
dloepp@crain.com

Manager, Digital Strategy & Development
David Irvin
dirvin@crain.com

Director, Audience Development & Data Products
Glenn Glasberg
gglasberg@crain.com

Plastics News Reports

Lead Analyst
Angie DeRosa
aderosa@crain.com

Research Analyst
David Hutton
dhutton@crain.com

Assistant Managing Editor
Jeannie Reall
jreall@crain.com

Contributing Analyst
Laura Williams
lrwllms1@gmail.com

Research Coordinator
Hollee Keller
hkeller@crain.com

Research Assistant
Lisa Pyles
lpyles@crain.com

Production Assistant
Kim Stannard
kim.stannard@yahoo.com

U.S. PLASTICS INDUSTRY LABOR TRENDS 2013

ANALYSIS OF EDUCATION, TRAINING AND WORKFORCE DEVELOPMENT

Table of Contents

Charts & Tables

Directories

Perspectives

Upcoming Reports From Plastics News Reports

Automotive Market Review and Outlook 2013
Release: March 2013
Thermoformers Review and Outlook 2013
Release: April 2013
Medical Equipment Market Review and Outlook 2013
Release: May 2013

To learn more about *Plastics News Reports*, purchase single or multi-user licenses, or specific research needs, contact:

Glenn Glasberg
+1-330-865-6161
gglasberg@crain.com

To view our library of market analyses and data reports, please visit
www.plasticsnews.com/data

Statistical data contained in this report is compiled by primary and secondary research and in-house analysis by Plastics News' team of experts. To discuss specific research needs, please contact Glenn Glasberg at +1-330-865-6161.

Despite slow economic growth, some positive signs

The labor market in the United States looks vastly different today than in recent decades. Global macroeconomic influences such as demographic changes and recession have shifted the country's economy in the direction of service and professional sectors.

The U.S. labor market continued in a positive direction in 2012, though hiring was not robust enough to kick the soft recovery into high gear. Economic forecasters expect a similar performance in 2013.

U.S. manufacturers are in a dilemma partly of their own making. They are the world's most productive, generating nearly 21 percent of the world's manufacturing output, and have gained that status by focusing on high-value, high-quality products stamped out on automated production lines. Manufacturing employment is lower than any time since the 1930s because the advanced factory has little need for entry-level workers with little education. Instead it needs toolmakers, processors, engineers, millwrights and electronics technicians – exactly the kind of skills that the American education system no longer nurtures.

By the numbers

Employment in the private sector increased by 192,000 jobs in January, according to the ADP National Employment Report. The report is produced by Automatic Data Processing Inc., a Roseland, N.J.-based provider of business outsourcing services, in collaboration with Moody's Analytics, which offers insights to global financial markets.

The report, which is derived from ADP's actual payroll data, measures the change in total nonfarm private employment each month on a seasonally adjusted basis. The December 2012 report, which reflected job gains of 215,000, was revised downward by 30,000 to 185,000 jobs.

Construction added 15,000 jobs in January, while manufacturing lost 3,000 jobs.

Carlos A. Rodriguez, president and CEO of ADP, noted that the reports indicate private-sector employers created an average of 183,000 new jobs per month during the last three months.

"This is an encouraging sign of steady improvement in the job market," he said.

Mark Zandi, chief economist of Moody's Analytics, pointed out that the job market is slowly, but steadily, improving.

"Monthly job gains appear to have accelerated from near 150,000 to closer to 175,000," Zandi said. "Construction is finally kicking into gear and more than offsetting the weakness in manufacturing. The recent gains may be overstating any improvement, particularly in the context of recent revivals in growth at the start of the past three years, but the gains are encouraging nonetheless."

According to Zandi, January's job losses in the manufacturing sector could be seasonal, following some holiday ramp-up. "Manufacturing dialed back in January as a result of fallout from fiscal cliff concerns and general uncertainty about Fed policy, which created uncertainty for manufacturers, as well as persistently weak conditions from abroad. Exports declined during the fourth quarter," he said. "Manufacturing surveys for January (several regional Fed surveys and the New York Empire State survey) all indicated weakness in January.

"It is also possible that companies are beginning to change operations in anticipation of the implementation of the Affordable Care Act," Zandi said. "This is inducing companies to keep employment under 50 and to hire more part-time workers. As a result, there could be some migration from mid-sized to small companies."

The increase in small companies also could be the result of seasonal factors and growth in certain industries, such as construction, which are dominated by small companies.

Moreover, Zandi said the small loss among large companies also is likely the result of seasonal factors and not a developing trend, particularly for such seasonally sensitive industries as leisure/hospitality and retail trade.

"Sales have begun the year on a weak note and large companies could be adjusting to this change," he said. "In particular, higher payroll taxes are affecting disposable income and thus purchasing

About this report

This report, "U.S. Plastics Industry Labor Trends 2013 - Analysis of Education, Training and Workforce Development" focuses on key workforce issues that are important to companies in today's economic climate. Our experts highlight workforce-related strategies and provide in-depth analysis of labor trends in the United States, including growth performance in 2012 and an outlook for 2013 and beyond. Some of the key issues addressed include recruiting and retention, the skills gap, contingent workers, managing millennials, right-to-work and unionization, women in manufacturing and veterans in today's job market.

Our experts also include analysis from some of today's leading thought leaders. Taken together, we feel they offer a valuable cross-section of the labor landscape in the United States today.

- Social media as a recruiting tool
- Women in manufacturing
- Military veterans as a talent pool

THIS 88-PAGE REPORT ALSO CONTAINS:

CHARTS FOCUSING ON KEY LABOR DATA AND STATISTICS ...

CIVILIAN LABOR FORCE
Persons 16 years of age and over

Year	Civilian noninstitutional population	Civilian labor force		Employed		Employed		Unemployed		Not in Labor force
		Total	Percent of population	Total	Percent of population	Agriculture	Nonagricultural industries	Number	Percent of labor force	
1992	192,805	128,105	66.4	118,492	61.5	3,247	115,245	9,613	7.5	64,700
1993	194,838	129,200	66.3	120,259	61.7	3,115	117,144	8,940	6.9	65,638
1994	196,814	131,056	66.6	123,060	62.5	3,409	119,651	7,996	6.1	65,758
1995	198,584	132,304	66.6	124,900	62.9	3,440	121,460	7,404	5.6	66,280
1996	200,591	133,943	66.8	126,708	63.2	3,443	123,264	7,236	5.4	66,647
1997	203,133	136,297	67.1	129,558	63.8	3,399	126,159	6,739	4.9	66,837
1998	205,220	137,673	67.1	131,463	64.1	3,378	128,085	6,210	4.5	67,547

Source: Bureau of Labor Statistics

A DIRECTORY OF MORE THAN 150 COLLEGES AND UNIVERSITIES OFFERING PLASTICS AND PLASTICS-RELATED PROGRAMS ...

University of Massachusetts - Lowell
1 University Ave Lowell, MA 01854
P: 978-934-4000
Public
Enrollment: 14,000
www.uml.edu

Programs offered:
UMass-Lowell has a Plastics Engineering Department offering bachelor's, master's and doctorates in Plastics Engineering; also offers

119 S. University Ave. Mt. Pleasant, MI 48858
P: 989-774-4000
Public
Enrollment: 28,000
www.cmich.edu

Programs offered:
Industrial and Engineering Technology (four-year)

Contacts:
- School of Engineering and Technology

Contacts:
- Scott Lampe, 616-234-3652, slampe@grcc.edu

Kalamazoo Valley Community College
6767 W. O Ave., Kalamazoo, MI 49009
P: 269-488-4400
Public
Enrollment: 11,000
www.kvcc.edu

Programs offered:

A DIRECTORY OF MORE THAN 70 WORKFORCE-RELATED RESOURCES THAT OFFER POTENTIAL SOURCES OF FUNDING AND GUIDANCE, INCLUDING INFORMATION ON HIRING, TRAINING, INTERNSHIPS AND APPRENTICESHIPS ...

U.S. Department of Labor

Career One Stop
www.careeronestop.org
Sponsored by the U.S. Department of Labor, Career One Stop provides tools to help job seekers, students, businesses and career professionals.

Center for Faith-Based and Community Initiatives
www.dol.gov/cfbnp
The Center for Faith-based and Neighborhood Partnerships at the U.S. Department of Labor implements Secretary Hilda L. Solis' vision of Good Jobs for Everyone by building partnerships with faith-based groups, community organizations and neighborhood leaders

referrals to the One-Stop system, connecting with community colleges and other providers of occupational skills training, and providing or referring ex-offenders to needed supportive services. The Department of Labor also uses its REXO funds to implement grant projects aimed at young adult offenders, juvenile offenders, and students in high-risk high schools.

State Funding Sources
www.doleta.gov/brg/indprof/Manufacturing_investment.cfm
Part of the President's High Growth Job Training Initiative, the website offers links to 32 programs across the nation that offer funding opportunities for employers

Q&A INTERVIEWS WITH KEY INDUSTRY THOUGHT LEADERS ...

Executive Spotlight | Michael Taylor

Senior Director of International Affairs & Trade, Society of the Plastics Industry Inc.

Michael Taylor is senior director for international affairs and trade at Society for the Plastics Industry Inc. He advises the Washington, D.C.-based group's staff and membership on the impact of international trade law and regulatory actions, and advocates SPI positions before government officials and other policy makers. He also organizes and leads trade missions, provides trade facilitation services, and assists member companies in market entry planning and execution.

Prior to his current responsibilities, Taylor was director, Europe and Multilateral Programs of the Global Intellectual Property Center at the U.S. Chamber of Commerce. Taylor is a part-time lecturer in political science at Trinity Washington University in Washington, D.C. He received his bachelor's degree in International Affairs from the Elliott School of International Affairs at the George Washington University, and his master's in World Politics from the Catholic University of America.

Q: The recession of 2008-09 proved to be particularly difficult for many segments of the plastics industry. However, there were some sectors that were less impacted than others. In terms of employment, what plastics segments survived the recession with minimal impact?

A: From an employment perspective, the segments that appeared to be impacted the least were materials and resins, packaging film and sheet, pipe and pipe fittings, and bottles. Of these, the best performer was materials and resins.

Q: Several segments were hit particularly hard. As some sectors of the economy, such as construction, have been slow to rebound, it has had an impact on a number of plastics processors. What segment had the biggest impact from the recession? How is it rebounding?

CHARTS ON EMPLOYMENT TRENDS BY STATE AND INDUSTRY ...

NUMBER OF PLASTICS EMPLOYEES BY STATE (THOUSANDS)					
	2007	**2008**	**2009**	**2010**	**2011**
Alabama	15.7	17.5	16.3	14.3	14.2
Alaska	0.1	0.3	0.4	0.3	0.3
Arizona	11.4	9.8	9.4	8.1	8.1
Arkansas	12.4	11	9.4	9.6	9.4
California	94.7	88.9	75.7	75.8	74.9
Colorado	6.7	6.9	5.8	5.9	5.9
Connecticut	13	14.3	12.3	12.4	12.2
Delaware	3.2	2.3	2.1	1.9	1.9
District of Columbia	0	0	0	0.0	0
Florida	21.8	21.5	20.1	17.6	17.5
Georgia	29	28.9	26.2	24.3	24.5
Hawaii	0.5	0.5	0.5	0.5	0.5

Source: Society of the Plastics Industry Inc.