



Comprehensive Economic Development Strategy

2024-2028

*for the Southeast Louisiana
Economic Development District*

DRAFT



The Regional Planning Commission

The Regional Planning Commission (RPC) represents the New Orleans metropolitan area on matters of regional importance, including transportation, economic development, and the environment.

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Louisiana Economic Planning District 1:

Jefferson
Orleans
Plaquemines
St. Bernard
St. Tammany

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ACRONYMS

ACS	American Community Survey
CEDS	Comprehensive Economic Development Strategy
DRA	Delta Regional Authority
EDA	Economic Development Administration
EDD	Economic Development District
GUMBO	Granting Underserved Municipalities Broadband Opportunities
HBCU	Historically Black College or University
LQ	Location Quotient
LNG	Liquefied Natural Gas
NEXUS	New Energy Center of the United States
QXEQ	Quarterly Census of Employment and Wages
RPC	Regional Planning Commission
SWOT	Strengths, Opportunities, Weaknesses, and Threats



I. Introduction

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The Comprehensive Economic Development Strategy

The Comprehensive Economic Development Strategy (CEDS) is a strategic framework designed to guide economic growth and resilience in Economic Development Regions across the United States. It serves as a blueprint for coordinated public and private sector efforts, promoting sustainable development, job creation, and improved quality of life. The Economic Development Administration (EDA) requires that each regional CEDS be updated at a minimum of every five years. Here in Southeastern Louisiana, this **2024-2028 CEDS** will support the region's economic potential and address its unique challenges.

Southeastern Louisiana encompasses the vibrant New Orleans region, including cities, traditional post-war suburbs, and many rural communities along sensitive wetlands. It is a region of immense cultural heritage and economic significance; however, it faces distinctive issues including vulnerability to natural disasters due to its low-lying coastal geography, racial disparities, and an economy heavily reliant on sectors like tourism, energy, and maritime industries.

This CEDS tailored for Southeastern Louisiana

addresses these concerns by focusing on several key pillars:

Emerging Industries: Identify and support emerging industries for which Southeastern Louisiana is uniquely positioned to take advantage of based on its unique location, culture, and workforce.

Entrepreneurship: Support start-up incubators and accelerators to encourage entrepreneurship in the region.

Workforce Development: A skilled workforce is essential for sustainable economic growth. The CEDS encourages partnerships between educational institutions, vocational training centers, and industries to ensure that the local workforce is equipped with the necessary skills for emerging job markets.

Legacy Industries: Support the legacy industries which continue to form the backbone of the region's economy such as hospital, tourism, and oil production.

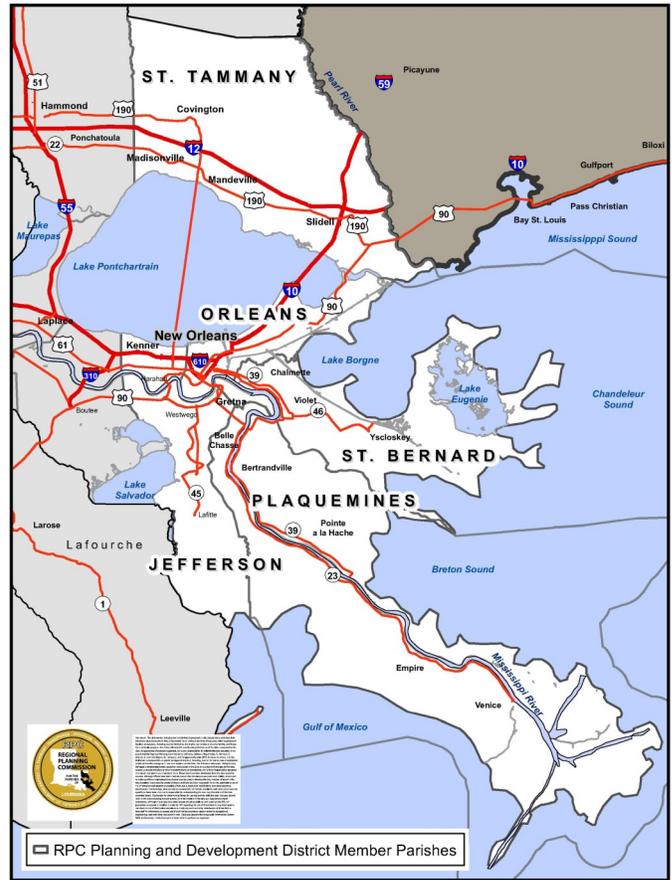
Blue Green Economy: Southeast Louisiana is especially well-positioned to take advantage of the global shift towards renewable energy. The CEDS supports the development of clean energy

industries such as solar, wind, and sustainable transportation.

wetlands and bayous is both a source of beauty and a call to action for preservation.

Equity and Inclusion: Addressing racial disparities and promoting social equity is central to the CEDS. Initiatives to provide equal access to economic opportunities, affordable housing, and quality education will create a more inclusive and just economic landscape.

Resiliency: It is crucial that the CEDS work to equip our communities with the tools they need to withstand shocks and disruptions. In a rapidly changing global economy along with uncertainties such as natural disasters and economic downturns, a CEDS which focuses on resiliency will help our communities continue to thrive in the evolving economic landscape.



The Southeastern Louisiana Economic Development District

The Southeastern Louisiana Economic Development District Region 1 is comprised of Jefferson, Orleans, Plaquemines, St. Bernard, & St. Tammany Parishes. The region had a combined population of 1,150,454 according to the 2019 American Community Survey (ACS).

The region is steeped in a rich and diverse cultural heritage, and the economy is a mix of traditional and emerging sectors. Its natural environment, which includes

Developing the CEDS

The EDA outlines a strategic process for crafting a CEDS to drive regional economic growth. This process involves collaborative efforts and data-driven planning:

Stakeholder Engagement: Engage diverse stakeholders, including government agencies, businesses, community organizations, and educational institutions. This inclusivity ensures a comprehensive understanding of the region's strengths, challenges, and opportunities.

Data Collection and Analysis: Gather and analyze economic, demographic, and market data to assess the region's current economic landscape. This informs decisions by identifying trends, gaps, and competitive advantages.

SWOT Analysis: Conduct a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to identify internal strengths and weaknesses and external opportunities and threats. This assessment guides strategy formulation.

Goal Setting: Define clear economic development goals and objectives based on the SWOT analysis. Goals should be measurable, achievable, and aligned with the region's vision for growth.

Strategy Development: Craft strategies that leverage the region's strengths to address identified weaknesses and capitalize on opportunities. These strategies might focus on workforce development, infrastructure

improvement, innovation, or industry diversification.

Action Plan: Translate strategies into actionable initiatives and projects. Develop a detailed plan outlining responsible parties, timelines, required resources, and performance metrics.

Performance Metrics: Establish key performance indicators to track progress and evaluate the success of implemented initiatives. Regularly review and update these metrics to ensure continuous improvement.

Public Comment and Approval: Share the draft CEDS with the public to gather feedback and ensure alignment with community priorities. After revisions, seek official approval from relevant authorities.

Implementation and Monitoring: Execute the action plan, collaborating with stakeholders and overseeing project execution. Continuously monitor progress and adjust strategies as needed based on evolving economic conditions.

Evaluation and Reporting: Periodically assess the CEDS's effectiveness in achieving economic development goals. Prepare comprehensive reports that highlight accomplishments, challenges, and lessons learned.

Iterative Process: Recognize that economic development is an ongoing process. Regularly review and update the CEDS to adapt to changing circumstances, technologies, and opportunities.

By following this strategic process, the EDA's creation of a CEDS promotes sustainable economic growth by leveraging local strengths, addressing challenges, and fostering collaboration among diverse stakeholders.

Southeastern Louisiana Stakeholders

Following EDA guidance, RPC assembled a diverse group of stakeholders based on key aspects of the regional economy to contribute to this document. The SWOT analysis was conducted electronically, and responses were received from 67 individuals. Respondents included private sector leaders from major industry clusters, economic development organizations, non-profit organizations, higher education institutions and workforce development professionals.

Two workshops were held in 2023, facilitated by Dr. Geoffrey Stewart, Endowed Chair in Regional Business Development at the University of Louisiana at Lafayette. The workshops delved into responses from the electronic survey and resulted in the SWOT shown in this document (page 12). Regional Economic Development Professionals were invited as follows:

City of New Orleans, Greater New Orleans Foundation., Greater New Orleans Inc., Hispanic Chamber of Commerce of

Louisiana, Jefferson Chamber, Jefferson Economic Development Association, Louisiana Chamber of Commerce Foundation Inc., New Orleans Business Alliance, New Orleans Chamber of Commerce, Plaquemines Association of Business and Industry, St. Bernard Economic Development Foundation, St. Bernard Chamber, St. Tammany Chamber, St. Tammany Corporation, Urban League of Louisiana, Westbank Business & Industry Association

Dialogue in the meetings, and SWOT survey responses informed development of draft Goals and Objectives, which were distributed electronically to the larger group for further input and refinement.

IV. Strengths, Weaknesses, Opportunities, and Threats

A SWOT analysis is a strategic planning tool to assess a region’s internal Strengths and Weaknesses, as well as external Opportunities and Threats. It provides an overview of the current situation, aiding in making informed decisions and formulating effective strategies. Here's a brief breakdown of each component:

Strengths (S): These are the internal factors that give a region its competitive advantage.

Weaknesses (W): These are internal factors that hinder a region’s performance.

Opportunities (O): These are external factors that a region could leverage to its advantage.

Threats (T): These are external factors that pose challenges or risks to an organization.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong petroleum, healthcare, higher education, and film production industries • World-class cultural destination • Hospitality and tourism • Native residents feel a close connection to home. • Transportation resources including ports, freight rail, and passenger rail • Natural resources for fishing, hiking, boating, etc. 	<ul style="list-style-type: none"> • Declining population • Crime • Unskilled workforce • Low national rankings in healthcare outcomes and K-12 education • The tax system perceived as complicated. • Aging infrastructure • Poor public transportation • Shortage of affordable childcare • Aging workforce • Dependency on vulnerable industries
Opportunities	Threats
<ul style="list-style-type: none"> • Green energy production, including solar, hydrogen, and wind. • Manufacture of offshore wind components • Burgeoning gaming industry • Redevelopment of brownfield sites • Workforce development to match residents to jobs in emerging industries. • Equitable access to jobs for youth, disadvantaged, and formerly incarcerated. • Regionalization of public transportation • Superregional planning along all of South Louisiana 	<ul style="list-style-type: none"> • “Brain-drain” to other states/regions • High auto, home, and flood insurance rates • Frequent natural disasters • Highly educated workers are more mobile than ever



II. Strategic Direction & Action Steps

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In Southeastern Louisiana we envision a thriving region which capitalizes on our unique strengths, invests in emerging opportunities, and actively mitigates the risks associated with our coastal location.

Based on the SWOT Analysis, along with outreach to regional leaders in the public, private, and nonprofit sectors, several goals, and objectives have been crafted to guide the region's economic growth over the next several years.

The first goal looks to the future and seeks to identify emerging industries for which Southeastern Louisiana is uniquely positioned to take advantage of. For example, our regional expertise in offshore oil drilling translates well into offshore wind turbine engineering, construction, and manufacturing. The unique cultural experiences offered here make the New Orleans area an attractive home for tech workers who are free to work from wherever they choose.

The second goal focuses on the community well-being of the residents who call southeastern Louisiana home. This can be accomplished through quality-of-life initiatives, such as improvements in public safety, access to quality

and affordable childcare for working families, and improved regional public transportation.

The final goal is perhaps the most important, ensuring our region is resilient to natural hazards and other disruptions. We can improve regional resiliency by diversifying our economy, investing in projects which improve the resiliency of our transportation network, as well as green infrastructure and other stormwater management strategies.

GOAL 1: Economic Growth & Diversification

1.1 Support Emerging Industries & Entrepreneurship

Identify emerging industries for which Southeastern Louisiana is uniquely positioned to take advantage of based on its unique location, culture, and workforce.

DIVERSIFY	NEW & EMERGING INDUSTRY	DEVELOP	ATTRACT & RETAIN
Action Steps:			
Diversify the regional economy by identifying new opportunities for which Southeastern Louisiana is uniquely positioned due to its location, culture, and workforce.	Support emerging industries in the region such as software development, film and digital media, solar power, hydrogen, wind power, and other industries associated with the “blue-green economy”.	Further develop the strong entrepreneurial climate in the region by supporting incubators, accelerators, and other providers of technical assistance. Work to increase the availability of venture capital to grow and retain local startups.	Support programs which will attract and retain younger people, recent college graduates, and experienced workers.

1.2 Support Legacy Industries

Goal 1.2 seeks to support the legacy industries which form the backbone of the region’s economy. This can be done by ensuring they have a pool of skilled workers to choose from, and by helping them become more resilient to future shocks and disruptions.

WORKFORCE DEVELOPMENT	RESILIENCE
Action Steps:	
Continue to provide support and workforce development for industries which have historically provided a backbone for the region’s economy such as oil and gas production, healthcare, and education. Encourage partnerships between training providers and industry.	Help our legacy industries become more resilient to natural disasters, climate change, rapidly changing technologies, and other potential disruptions.

GOAL 2: Community Well-Being

QUALITY OF LIFE	EQUITY	HOUSEHOLD INCOME
Action Steps:		
Economic growth should enhance the overall well-being of our community. We will prioritize investments that support improved quality in healthcare, education, quality childcare, and public safety.	Support equitable access to economic opportunities for lower income communities and households.	Improve quality of life across the region by lowering unemployment through the attraction/retention of high-quality jobs and raising household income through the provision of accessible workforce training.

GOAL 3: Resiliency

INFRASTRUCTURE	WATER MANAGEMENT
Action Steps:	
Improve the regional infrastructure's ability to withstand, and recover, from disruptions such as flooding, subsidence, and natural disasters.	Support responsible water management strategies and green infrastructure to mitigate the risks from flooding.



III. Regional Analysis

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What Have We Done?¹

Like many regions nationwide, the economy of Southeastern Louisiana experienced significant challenges since the previous CEDS was published in 2019. This was due to various factors, including the COVID-19 pandemic which began in 2019 and Hurricane Ida which struck the region in 2021.

The COVID-19 pandemic caused widespread disruptions across industries which are crucial to Southeast Louisiana’s economy including tourism, hospitality, and energy. The pandemic also led to job losses and changes in employment dynamics. Many businesses faced operational challenges, and workers experienced shifts in remote work, furloughs, or layoffs.

Supply chain issues caused construction delays, and worker shortages which increased costs across the board.

Hurricane Ida made landfall near Plaquemines Parish, inundating communities with 8 feet of storm surge. The storm resulted in significant population and job losses in the Parish.

Where Are We Going?



National Renewable Energy Lab. "Offshore Wind." Flickr. 04 Oct. 2023.

In spite of these challenges, the region experienced exciting economic positives during this period as well. The region is rapidly transforming into a hub for entrepreneurship and technological advancement.

The region has seen strong growth in the film, digital media, and video game development market, and has been successful at attracting game development studios.

Healthcare remains a strong economic engine for the region, with globally recognized health systems, bio innovation, and research universities. The region has experienced a 150% change in healthcare technical workers and a 452% increase in nurse practitioners since 2011.

¹Greater New Orleans, Inc. & Bank of America. (2022) "Greater New Orleans Jobs Report."

in nurse practitioners since 2011.

South Louisiana, which is historically reliant on the volatile oil and gas sector, is now posed to be a leader in green energy in the South. Wind power, carbon capture, and solar energy are among the emerging green energy sectors South Louisiana is uniquely positioned to take advantage of. In August, the first offshore wind auction in the Gulf of Mexico resulted in a lease off the coast of Louisiana. The region lags behind the Northeast in offshore wind due to hurricanes and other weather factors.

The region's location along the Mississippi River delta has made it an ideal transportation hub for centuries. Today, it boasts several deepwater ports, a best-in-class airport, and six Class I railroads. Expanded port capacity planned for the region will provide additional opportunities for international trade and resulting in economic growth. Since 2011 the region has experienced a 22% increase in water vessel pilots, and a 500% increase in flight attendants.

The Future of Energy in Southeast Louisiana

Our region possesses unique market conditions that will catalyze unprecedented investment and advancement in renewable energy technology and

manufacturing. By supporting current energy sectors while exploring CO2 reduction opportunities, the region is experiencing a major economic boost that is creating jobs and attracting private investment.

In addition to opportunities to oil, gas, wind, and solar power, there is a strong equity argument to be made for the region's transition to green energy. A multipronged equity approach will specifically address the needs by these three historically underserved groups:

- Black populations that have been historically excluded
- Rural oil & gas workers who have lost their jobs (or are in danger of loss, given trends)
- Rural communities and communities of color impacted by carbon-intensive industry.

Broadband

- St. Tammany: 1.63%

In today's increasingly digital world, access to broadband internet has become more than a convenience; it's a necessity and a matter of equity. This is especially true in rural areas, where limited access to broadband can lead to significant disadvantages in education, healthcare, economic opportunities, and overall quality of life. When many everyday tasks moved online amid the COVID-19 pandemic, this with limited access to broadband were even more vulnerable.

Addressing this issue requires concerted effort from the private sector, public sector and local communities.

In Louisiana, the Granting Municipalities Broadband Opportunities (GUMBO) grant program helps private providers facilitate the deployment of broadband service to underserved areas of the state. The initial round of grants took place during the Summer of 2022. To date, over \$170 million has been awarded to 50 Parishes.

Residents without Broadband Access

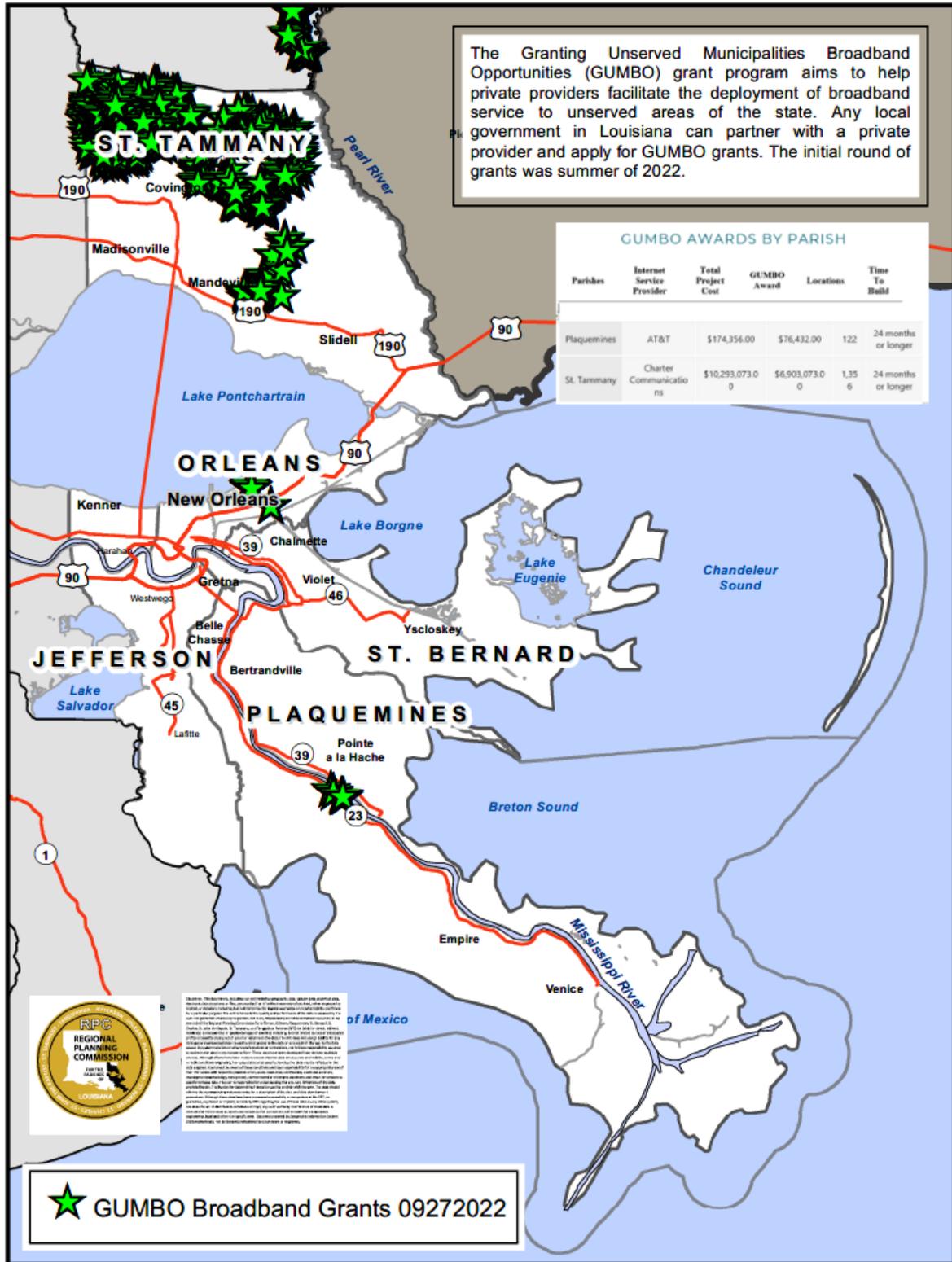
- Orleans: .7%
- St. Bernard: 2.3%
- Jefferson: .44%
- Plaquemines: 17.67%

Digitally Illiterate Residents

- Orleans: 19.4%
- St. Bernard: 16.6%
- Jefferson: 18.2%
- Plaquemines: 15.8%
- St. Tammany: 14.3%

Louisiana is slated to receive \$1.3 billion in funding to address the digital divide across the state. The broadband expansion will help to accelerate the growth of Louisiana's economy while increasing access to healthcare and education.

The state's goal is for 100 percent of Louisiana residents and businesses to receive access to high-speed, affordable, and reliable internet by 2029.

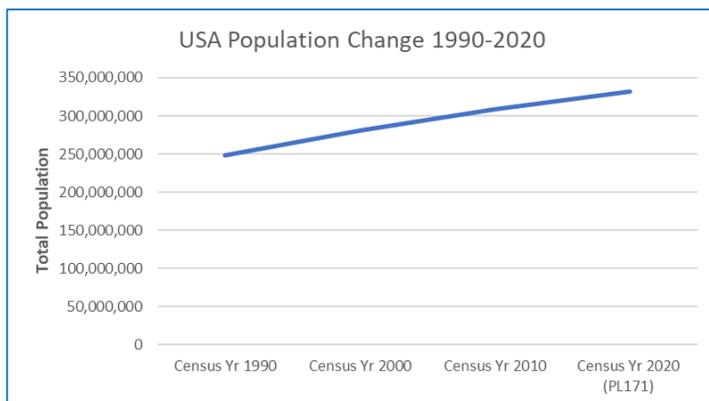
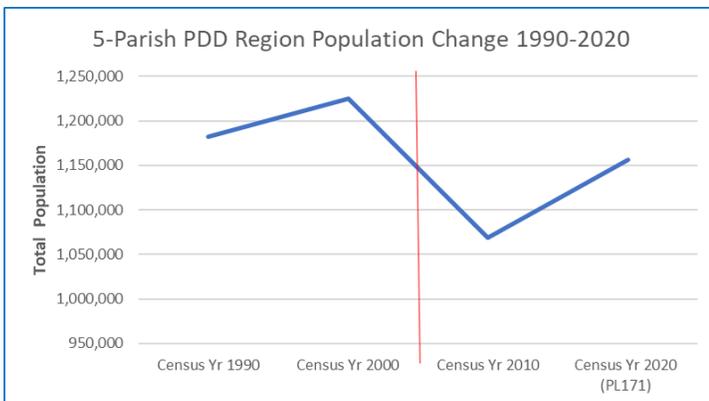


Regional Demographics Since the Previous

CEDS^{1, 2}

Population

- Total population in the region increased from 1,142,882 to 1,153,532. An increase of .93%
- Population loss in New Orleans and St. Bernard Parish was offset by significant increase of over 13,000 in St. Tammany.
- The overall population increase for the region was less than the national increase of 2.72%



¹Data compiled from the American Community Survey (ACS) 5 Year Summary File (2013 – 2017) published December, 2018 by the U.S. Department of Commerce, Economics and Statistics Administration, U.S. Census Bureau. Data received in text format, and joined to spatial geography files by the New Orleans Regional Planning Commission (RPC). Specific tabular data relating to RPC activities formatted for mapping and analytical purposes.

²Data compiled from the American Community Survey (ACS) 5 Year Summary File (2017 – 2021) published December, 2021 by the U.S. Department of Commerce, Economics and Statistics Administration, U.S. Census Bureau. Data received in text format, and joined to spatial geography files by the New Orleans Regional Planning Commission (RPC). Specific tabular data relating to RPC activities formatted for mapping and analytical purposes.

Population Over Age 65

- The number of residents aged 65 and older in our region increased by 14.12%
- During this same time period, the number of citizens nationally aged 65 and older increased by 10.8%
- As older workers begin to retire, this can have implications for economic development and can lead to potential labor shortage. The region may need to invest in strategies to attract younger professionals.

Race and Ethnicity

- Mirroring trends observed across the nation, White population decreased in the region while minority populations increased. Part of this may be attributable to additional categories of race and ethnicity in the Census, from which to self-identify.
- The Hispanic population increased by 5.05% regionally, with the largest increases in Plaquemines and St. Tammany Parishes.

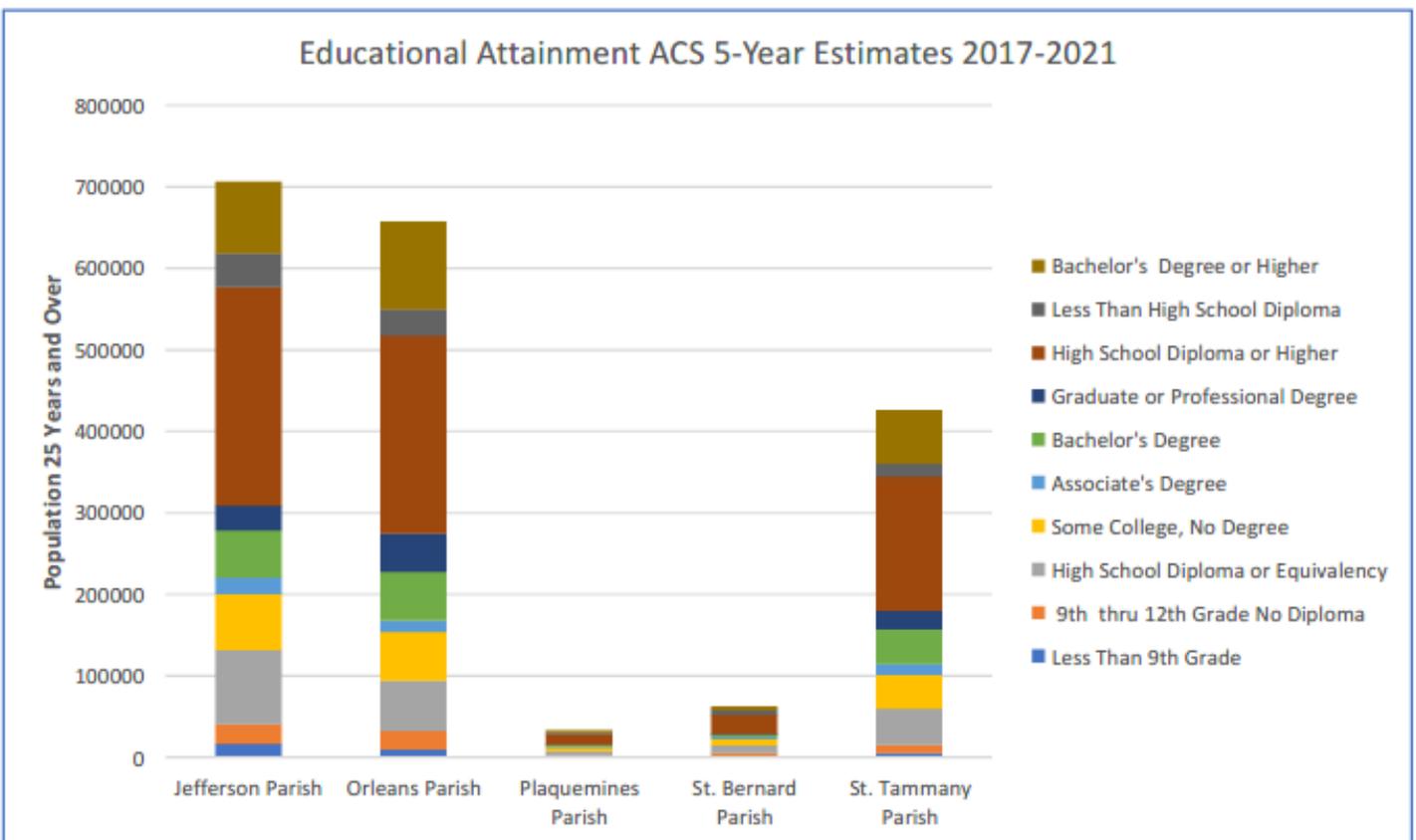
- Whites saw the greatest total decrease in population, losing about 29,000.

Income and Poverty

- Median household income for the region rose less than the nation as a whole—18.6% compared to 19.72%
- The number of households in poverty in the region increased by 3.21% while that number declined by 6.15% nationally.
- Plaquemines and Orleans saw the greatest increases in average household income, while St. Tammany and St. Bernard experienced the greatest increases in household poverty.

Educational Attainment

- The percentage of residents in the region aged 25 and older without a high school diploma decreased by 12.36% This was better than the national average, which only decreased by 8.7%
- The percentage of residents with a bachelor’s degree increased by 11.56%, compared to 12.03% nationally.
- 17.2% of Orleans Parish residents have a graduate or professional degree, compared to 13.1% nationally.



Employment

- The regional population of residents aged 16+ in the civilian labor force declined by .02%, while it increased nationally by 3.42%
- Unemployment decreased nationally by 13.24 while it only decreased by 5.56% in the region.
- Unemployment increased by 67% in Plaquemine’s Parish which is likely due to the effects of Hurricane Ida in September 2021.

Housing

- Total housing units in the region increased by 2.91% which was slightly lower than the national increase of 3.14%
- Homeownership increased by 5.44% in the region, as compared to 5.7% nationally.
- Rental housing became less affordable in St. Bernard and St. Tammany Parishes, while it became more affordable elsewhere in the region. Plaquemine’s Parish experienced a significant *decrease* in cost burdened housing units, likely due to the effects of Hurricane Ida.

Relationship to the National Economy

The economy of Southeast Louisiana is intricately connected to the rest of the United States through various economic, industrial and trade factors, most notably in oil and gas production and refining.

The region’s oil refineries and offshore drilling activities contribute to the nation’s energy supply. These resources help shape national energy security and independence.

The transportation infrastructure of the region including ports, waterways, and six Class 1 rail lines, play a vital role in the movement of goods within the United States and internationally. The Port of New Orleans, for example, is the only deep-water container port in Louisiana. It serves as a major gateway for imports and exports and is the 5th busiest port in the nation by cargo volume. The region is also home to the Port of Plaquemines, Port of St. Bernard, and Avondale Global Gateway.

Louisiana produces more than 850 million pounds of seafood each year, and our region employs hundreds in the fishing and seafood preparation industries. The state is the second largest seafood producer in the contiguous United States.

The culture and heritage of Southeastern Louisiana, especially in cities like New Orleans, is well-known across the nation. Festivals, attractions, restaurants, and nightlife draw visitors from across the country to the region. This contributes to a cultural exchange and revenue generation which has national implications for the tourism and hospitality industries.

Environmental & Natural Resource Profile



McCarthy, Michael. "Louisiana Swamp." flickr. 6 Oct 2023.

The Southeastern Louisiana region is characterized by unique environmental, geographic, and natural resource features.

Environmental

The Mississippi River Delta is the most prominent feature in southeastern Louisiana. It is formed by the deposition of sediment carried by the Mississippi River, creating a complex network of distributaries, marshes, and barrier islands. One of the defining features of the region is its extensive wetlands and marshes. These areas are habitats for a diverse range of plant and animal species, including birds, reptiles, amphibians. The region's coastal location along the Gulf of Mexico makes it susceptible to coastal erosion, hurricanes, and tropical storms. The coastline is constantly evolving due to both natural and

human activities.

Off the coast of southeastern Louisiana, barrier islands such as Grand Isle, Avery, and Breton Islands act as a natural buffer against storm surges. They are ecologically significant and contribute to the protection of the mainland.

Natural Resources

Southeastern Louisiana is a major hub for oil and natural gas production due to the Gulf of Mexico's significant petroleum reserves. The coastal waters are also rich in seafood resources, including shrimp, crabs, and various fish species, and the brackish waters of the Mississippi River Delta are ideal for farming oysters. Commercial fishing and seafood processing are important industries in the area.

The unique natural features also attract tourists interested in outdoor recreation and ecotourism. Birdwatching, fishing, and other water-based activities are popular recreational activities. The diverse ecosystems provide water purification, flood control and carbon sequestration. Protecting these resources is crucial for maintaining the overall health of the region.

Historic Preservation

Due to its unique and complex history, historic preservation is critical to maintaining the region’s rich historical, architectural, and cultural heritage.

Many parts of the region feature historic architecture that reflects French, Spanish, Creole, and/or American influences. Twenty-one New Orleans neighborhoods are listed on the National Register of Historic Places. Neighborhood groups such as the Vieux Care Commission and the Old Arabi Historic District have a mission to protect the architectural integrity of their jurisdictions.

Countless organizations, both government and non-profit, are dedicated to the preservation of Southeastern Louisiana history and culture. The Preservation Resource Center, Los Islenos Museum & Village, the Jazz Museum of New Orleans, the LGBT Archives Project of Louisiana, and the Congo Square Preservation Society are but a few such organizations.

Analysis of Regional Industries

As part of the CEDS process, an analysis of regional industries and industry clusters was conducted.

This included a look at which industries gained and lost the most jobs, which industry clusters stand out in our region, and profiles of high-performing industry clusters.



Louisiana Travel. "Xavier University." flickr. 6 Oct 23

Total Regional Employment by Industry (2019—2023)³

Total Jobs

Industry	2019 Jobs	2023 Jobs	% Change
Full-service restaurants	30,820	26,321	-15%
General Medical Hospitals	18,279	19,680	8%
Local Government	19,774	18,728	-5%
Limited-Service Restaurants	18,029	16,354	-9%
Colleges, Universities & Professional Schools	11,649	14,845	27%

Largest # Increase of Jobs

Industry	2019 Jobs	2023 Jobs	# Change
Colleges, Universities & Professional Schools	11,649	14,845	3,196
Motion Picture & Video Production	2,575	4,657	2,082
Warehouse Clubs & Supercenters	5,434	7,033	1,599
General Medical Hospitals	18,279	19,680	1,401
Elementary & Secondary Schools	11,649	14,845	796

Largest % Increase of Jobs

Industry	2019 Jobs	2023 Jobs	% Change
Pipeline Transport of Crude Oil	14	328	2,243%
Automatic Environmental Control M'facturing	16	164	925%
Plastics Bottle Manufacturing	59	534	805%
Industrial Gas Manufacturing	24	167	596%
Packaging and Labeling Services	13	84	546%

³**Industry Data:** Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployee Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

State Data Sources: This report uses state data from the following agencies: Louisiana Workforce Commission

Largest # Decrease in Jobs

Industry	2019 Jobs	2023 Jobs	% Change
Full-service restaurants	30,820	26,321	-4,499
Hotels (except Casino hotels) and motels	12,197	9,174	-3,023
Colleges & Universities (State Gvt.)	8,354	6,400	-1,954
Hospitals (Local Government)	5,303	3,564	-1,739
Crude Petroleum Extraction	2,557	833	-1,724

Largest % Decrease of Jobs

Industry	2019 Jobs	2023 Jobs	% Change
Aircraft Manufacturing	117	0	-100%
Plywood Manufacturing	32	0	-100%
Coal, other mineral, and Ore Wholesalers	20	0	-100%
Other Basic Chemical Manufacturing	158	12	-92%
Meat and Meat Product Wholesalers	195	19	-90%

Regional Cluster Analysis

An *industry cluster* is a regional concentration of related industries. It refers to a collection of companies, technologies, and resources that relate to a particular industry and often work together to produce similar and interrelated products. A useful economic development tool for regions is to identify what it already does well and work to enhance these strengths.

In this section, we identify the industry clusters which are present in the Southeast Louisiana Economic Development District, and highlight those which are most impactful, or offer the most growth potential.

The following are the regional clusters identified in the Southeastern Louisiana region. They have been divided into two categories – *Foundational* and *Emerging*.

Foundational Cluster Identification

For the regional cluster analysis, all clusters were scored on the following criteria:

- Earnings: higher score for higher earnings per worker.
- Growth: higher score for more overall job growth.
- Regional Competitiveness: higher score if regional job growth exceeds the national job growth for the industry.
- Regional Specialization: higher score if the regional job concentration is higher than the

- national average concentration for the industry.
- GRP: higher score the more the industry contributes to overall gross regional product

By weighing these five criteria equally, the following industry clusters are most impactful in Southeastern Louisiana. This is not a benchmark against other regions; it only compares the relative performance of each cluster to each other:

High Performing Industrial Clusters

High Performing Cluster	# of industries	# of jobs
Video Distribution & Production	3	4,755
Oil & Gas Production & Transportation	9	5,111
Education & Knowledge Creation	15	23,679
Local Health Services	37	70,232
Water Transportation	45	8,287
Downstream Chemical Products	45	627
Federal Government Services	3	6,208
Fishing & Fishing Products	4	1,222

Moderately Performing Clusters

- Aerospace Vehicles & Defense
- Vulcanized & Fired Materials
- Local Financial Services
- Plastics
- Electric Power Generation & Transmission
- Upstream Chemical Products
- Local Commercial Services
- Local Utilities
- Information Technology & Analytical Instruments
- Financial Services
- Local Education & Training
- Distribution & Electronic Commerce
- Biopharmaceuticals
- Communications Equipment & Services
- Construction Products & Services
- Local Logistical Services
- Upstream Metal Manufacturing
- Food Processing & Manufacturing
- Paper & Packaging
- Textile Manufacturing
- Lighting & Electrical Equipment
- Automotive

- Nonmetal Mining
- Production Technology & Heavy Machinery
- Local Food & Beverage Processing & Distribution
- Local Industrial Products & Services
- Local Real Estate, Construction, & Development
- Transportation & Logistics
- Medical Devices
- Insurance Services
- Environmental Services
- Marketing, Design, & Publishing
- Insurance Services
- Environmental Services
- Marketing, Design, and Publishing
- Forestry
- Performing Arts
- Business Services
- Local Motor Vehicle Products & Services
- Metalworking Technology
- Downstream Metal Products
- Wood Products
- Local Household Goods & Services
- Jewelry & Precious Metals
- State Government Services
- Local Entertainment & Media

- Furniture
- Agricultural Inputs & Services
- Leather Related Products
- Music & Sound Recording
- Recreational & Small Electronic Goods
- Trailers, Motor Homes, & Appliances

Under-Performing Clusters

- Local Personal Services (non-medical)
- Livestock Processing
- Local Community & Civic Organizations
- Printing Organizations
- Apparel
- Local Retailing of Clothing & General Merchandise
- Hospitality & Tourism
- Local Hospitality Establishments

Profiles of High-Performing Clusters

Video Production and Distribution: 4 industries, 4,800 jobs.

Video production and distribution has gained prominence in recent years, driven by a combination of factors including tax incentives, diverse locations, and a skilled workforce. This cluster includes industries such as video production, postproduction, and video distribution. The region has become a hub for film and media, earning itself the nickname “Hollywood South.”

Industries within this cluster indicate strong growth potential, many with salaries over \$70,000.

Recent popular films and television shows filmed in the region include *American Horror Story: Coven*, *Queen Sugar*, *NCIS: New Orleans*, *12 Years a Slave*, and *Beasts of the Southern Wild*.

Oil and Gas Production and Transportation: 9 industries, 5,100 jobs.

This region is home to a dense network of oil and gas exploration, production, refining, and transportation facilities. This cluster includes offshore oil and gas production, refineries, petrochemical plants, and a complex network of pipelines, terminals, and transportation infrastructure.



A ship docked at the Port of New Orleans, loaded with breakbulk cargo. “Port of New Orleans.” Wikipedia. 13 Sept. 2023.

This cluster includes industries such as petroleum refineries, natural gas extraction, and drilling oil and gas wells as well as support activities. Median salaries in these industries frequently exceed \$100,000.

The Alliance Refinery in Belle Chase and Chalmette Refinery in St. Bernard Parish are two of the largest in the world, producing a combined 442,000 barrels per day.

Virginia-based Venture Global LNG recently invested over \$20 billion in Plaquemines Parish to build the most expensive liquified natural gas facility in the

United States. When complete in 2025, it is expected to create hundreds of high paying jobs with benefits for the New Orleans region.

Education and Knowledge Creation: 15 industries, 24,000 jobs

The region has a robust knowledge creation industry cluster, including eleven colleges, three HBCU's, two medical schools and a pharmacy school. Industries within this cluster include colleges and universities, apprentice training, exam preparation, flight training, and other support services.

The University of New Orleans will establish the New Energy Center of the United States (NEXUS) on its campus, as part of the \$50 million EDA Build Back Better H2theFuture grant. It will serve as the physical and programmatic hub for a range of clean energy initiatives.

Local Health Services: 37 industries, 70,000 jobs.

Institutions such as hospitals, medical centers, and clinics, cater to the medical needs of the region's residents. Industries within this cluster include diagnostic imaging, pharmacies, funeral homes, medical offices, and dialysis centers.

Downtown New Orleans boasts a burgeoning medical district, with campuses for the Veteran's Affairs Hospital, LSU Health Sciences, the Delgado Charity School of Nursing, the Louisiana Cancer

Research Center, and more.

With hospitals and clinics across the region, Ochsner Health System is the largest single employer, creating over 9,000 jobs.

Water Transportation: 11 industries, 8,287 jobs.

The region's location along the Mississippi River makes it uniquely positioned to facilitate the movement of goods such as petroleum, chemicals, agricultural products, and manufactured goods. Industries in this region include ship building and repairing, port operations, deep sea freight transportation, and marine cargo handling.

The Port of New Orleans, Avondale Shipyard, the Port of St. Bernard and Port of Plaquemines are clustered within the region. The Port of New Orleans is in the process of a major expansion downriver in St. Bernard Parish which would allow it to serve vessels of all sizes, avoiding this height limitations set by the Mississippi River Bridges.

Emerging Clusters

Software & Video Game Publishing

This cluster refers to the geographic concentration of companies involved in the development, production, distribution, and marketing of software and video games. It typically includes game development studios, publishers, distributors, marketing agencies, and related service providers.

In New Orleans, these industries have been growing in recent years with acquisitions such as Microsoft and Keywords. Benefits such as the digital media sales tax, which provides a 25% rebate on software payroll, are an example of deliberate strategies which have helped grow this cluster. Industry leaders believe the city must continue to address public safety, schools, and infrastructure, but the city's cultural heritage makes it a desirable place to live for developers who may be free to work from wherever they choose.

Blue-Green Economy

The region's strategic location along the Gulf of Mexico makes it well positioned to capitalize on emerging blue-green economy. Industries in this cluster include the maritime, energy, and environmental sectors where "blue" represents maritime and water-related aspects, and "green" reflects the focus on sustainability and environmental consideration.

Advanced Manufacturing

The advanced manufacturing industry cluster refers to a geographical concentration of interconnected companies, organizations, and institutions within the manufacturing sector that specialize in cutting-edge technologies, processes, and products. These clusters are characterized by collaboration, knowledge sharing, and innovation, which often result in increased efficiency, competitiveness, and

growth for the businesses involved. Advanced manufacturing clusters typically focus on emerging technologies such as 3D printing, robotics, automation, and smart factories to produce high-value products with improved quality and reduced production costs. These clusters often benefit from a skilled workforce, access to research and development resources, and a supportive ecosystem of suppliers and service providers, driving economic development and technological advancements in the region.

NASA's Michoud Assembly Facility, located in New Orleans East, is a great example of advanced manufacturing in the region. Michoud will play a central role in building the next generation of NASA's Space Launch System, a "super-heavy lift capability" rocket built to carry people and cargo into deep space.



A 170'-foot tall spacecraft welding tool at the Michoud Assembly Facility in New Orleans. "Vertical Assembly Center." Flickr. 15 Sept. 2023



V. Evaluation Framework

V. Evaluation Framework

The following metrics were selected to track progress toward goals identified through the SWOT and regional analysis. These metrics will be tracked and reported on during the annual update of this CEDS document

Economic Growth

Goal	Metric	Data Source	2023 Baseline
Economic Growth	Total Regional Employment	Lightcast	559,167
Economic Growth	Average Earnings Per Job	Lightcast	\$69,800
Attract and retain an educated workforce	% residents 25+ with college degree or greater	ACS 5-year	26.1%

Community Well-Being

Goal	Metric	Data Source	2023 Baseline
Equity	# of persistent poverty census tracts	ACS 5-year	82 (76 Jefferson, 6 Plaquemines)
Income	Median Household income	ACS 5-year	\$59,545
Housing Affordability	% Rented HU's w/ Cost Burden	ACS 5-year	50.93%

Resiliency

Goal	Metric	Data Source	2023 Baseline
Infrastructure Resilience	# of projects supported	Regional partners	0
Stormwater Management	# of projects supported	Regional Partners	0



VI. Appendix

REGIONAL PLANNING COMMISSION

JEFFERSON, ORLEANS, PLAQUEMINES, ST. BERNARD, ST. CHARLES, ST. JOHN THE BAPTIST,
ST. TAMMANY AND TANGIPAHOA PARISHES

November 14, 2023

Acknowledgements

On behalf of the Regional Planning Commission, I want to express my appreciation for everyone who made this document possible.

Members of the Strategy Committee dedicated their valuable time and expertise over the course of several months which informed the goals and objectives discussed in this plan.

Leaders of industrial, philanthropic, workforce development, and non profit organizations provided key insights into the strengths and challenges facing our region. The U.S. Economic Development Administration provided funding, guidance, and ongoing support through this planning process.

Mapping, data, and analysis was provided by RPC GIS Manager Lynn Dupont. Assistance with the SWOT analysis and facilitation of the Strategy Committee Meetings was provided by Dr. Geoffrey Stewart with the University of Louisiana at Lafayette (ULL) Moody College of Business Administration. This document was produced by RPC Economic Development Manager Adam Tatar.

Finally, a huge thank you to Maggie Woodruff for her stewardship of the Regional Economic Development Program over the last twelve years for RPC, and best wishes on her upcoming and well-deserved retirement.

This comprehensive blueprint for our region would not have been possible without each of you!

Sincerely,

Jeffrey W. Roesel
Executive Director
Regional Planning Commission

Appendix A: Public Comment

The CEDS was made publicly available for the 30-day comment period beginning October 9, 2023. The document was posted on RPC's website, and physical copies could also be requested.

Each comment was reviewed against the goals and purpose of the CEDS. Where appropriate, comments were incorporated into the plan.



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