

New Jersey's Transportation Distribution & Logistics Industry Cluster

Prepared by:

New Jersey Department of Labor & Workforce Development
Office of Research & Information
Bureau of Labor Market Information
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THE GOAL OF THIS REPORT IS TO HIGHLIGHT THE IMPORTANCE OF THE TRANSPORTATION, DISTRIBUTION & LOGISTICS CLUSTER TO NEW JERSEY

Identify the types of industries and establishments that make up the Transportation, Distribution, & Logistics (TDL) Cluster based on a standard industry classification system

Describe any similarities and differences among its components with regard to such variables as employment, wage, occupation type, education, and demographic characteristics

Examine any present distinctions within the cluster and its components that give New Jersey a competitive advantage compared to neighboring states, regions, or the nation, or show areas where New Jersey could improve to add to the state's economy

Analyze the current state of the Transportation, Distribution, & Logistics (TDL) Cluster and provide an outlook for employment into the future



OVERVIEW

- Defining the Transportation, Distribution, & Logistics (TDL) Industry Cluster
- Industry Trends
- Detailed Industry Analysis
- Occupational Analysis
- TDL Worker Characteristics
- Job Posting Analysis



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THE TRANSPORTATION, LOGISTICS, & DISTRIBUTION CLUSTER CONSISTS OF TWO MAJOR COMPONENTS

The transportation, distribution, and logistics industry cluster consists of industries within the **wholesale trade, transportation, and warehousing sectors**. For the sake of analysis, these industries can be further grouped by those related to **transportation** and those related to **distribution and logistics**.

Transportation	Distribution/Logistics
<p>This sector carries out the mode (air, rail, water, pipeline) of execution for the distribution and logistics plan. (Often referred to as a subset of distribution & logistics)</p>	<p>This sector focuses on planning controls for effective and efficient storage and transportation for moving people and products from one place to another.</p>
<ul style="list-style-type: none">• Air Transportation• Rail Transportation• Water Transportation• Truck Transportation• Transit and Ground Passenger Transportation• Pipeline Transportation• Scenic & Sightseeing Transportation• Support Activities for Transportation• Couriers & Messengers	<ul style="list-style-type: none">• Durable Goods Merchant Wholesalers• Nondurable Goods Merchant Wholesalers• Agents, Brokers and Wholesale Electronic Markets• Warehousing & Storage



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THE TRANSPORTATION, LOGISTICS, & DISTRIBUTION CLUSTER IS IMPORTANT TO THE STATE'S ECONOMY

In 2020, transportation, distribution, & logistics private sector employment averaged 401,005 workers in New Jersey. The cluster employed 12.5 percent of the state's private sector workers. Nationally, TDL accounted for just 9.5 percent of the private sector employment.

The annual average New Jersey private sector wage for TDL in 2020 was \$75,244. Total wages for the TDL cluster accounted for 12.7 percent of private sector wages statewide.

TDL contributed \$62.5 billion to the state's Real Gross Domestic Product (GDP - chained 2012 dollars) in 2020, the sixth highest dollar amount per state nationwide. New Jersey accounted for four percent (4.03%) of the nation's GDP generated from TDL.



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Sources: - [NJ Department of Labor & Workforce Development, Quarterly Census of Employment & Wages](#), Annual Averages
- [US Bureau of Economic Analysis](#)

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INFRASTRUCTURE: SEA

Port of New York and New Jersey (Located in Northern New Jersey)

Managed by the Port Authority of New York and New Jersey, the Port facilities include: [Port Newark Container Terminal](#) (Port Newark, NJ), [Maher Terminals](#) (Elizabeth, NJ), [APM Terminals](#) (Elizabeth, NJ), [GCT Bayonne LP](#) (Bayonne, NJ), [GCT New York LP](#) (Staten Island, NY), and the [Red Hook Container Terminal](#) (Brooklyn, NY)

- ❖ The Port of New York & New Jersey is an economic power house for New Jersey, as well as the region. One-third of the nation's GDP is produced within 250 miles of this Port.¹
- ❖ Serves all of the world's major ocean carriers and global alliances with over 70% first port of call.² It has six container terminals, which can handle nine 14,000 TEU vessels at the same time.

The Port of New York & New Jersey supported

For the State of New Jersey:

- ❑ Nearly 205,000 direct jobs
- ❑ Over 428,300 total jobs in the State
- ❑ More than \$29.3 billion in personnel income
- ❑ Nearly \$80.4 billion in business activity
- ❑ Nearly \$9.8B in federal, state & local tax revenues.

For the New Jersey's region:

- ❑ Over 500,000 jobs
- ❑ Accounted for nearly \$12 billion in tax revenue, and
- ❑ Responsible for \$36.1 billion in personal and \$99.5 billion in business income in the region.



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Sources: 1. [Journal of Commerce](#)

2. [Container News](#), July 18, 2021

[North Jersey Transportation Planning Authority Impact Study, July 2020](#)

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INFRASTRUCTURE: SEA

Port of New York and New Jersey (Located in Northern New Jersey)

Proactive Investments: Due to the pandemic, at the beginning of 2020, the Port's cargo volume had declined. However, throughout the global economic disturbances, the Port of New York/New Jersey remained open and operational. This in part was due to its recent critical infrastructure investments, which enabled the Authority to adapt, recover, and finish the 2020 year with a new container record of nearly 7.6 million 20-foot equivalent units (TEU). Included were investments such as the *Port Infrastructure Project* (involved raising the Bayonne Bridge (\$1.7 billion) and deepening its shipping channels by 50 feet (\$2.1 billion) thereby allowing for larger 15,000 TEU ultra-large container vessels to enter, as well as the \$149 million investment into the [ExpressRail Port Jersey](#), which helped to provide shippers faster service for moving more containers, via its rail network services.

Results - *The Port of New York / New Jersey ranked:*

#1 Largest container port on the Atlantic coast, 3rd in the U. S. and 23rd globally (*Total volume was up 1.5% from the previous year, while imports were second only to Los Angeles in the US.*)

#1 Fastest U.S. port growth of imports, which in 2020 was up by 8.1% from the prior year.

#2 Handling more than \$211.6 billion of the nearly \$1.8 trillion of US international freight.

..... And the gateway to one of the most concentrated consumer markets in North America.³

(Goods can be transported to 13.3 million consumers in 1 hour, 27.7 million in two hours and 46.3 million within 4 hours.)⁴



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Sources: 3. [Global Trade Magazine, October 9, 2020](#)

4. [Port Authority of NY/NJ](#)

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INFRASTRUCTURE: SEA

Port of Camden, Paulsboro & Salem (Located in Southern New Jersey)

Operated and maintained by the [South Jersey Port Corporation \(SJPC\)](#), the port facilities include: the [Port of Camden](#) ([Joseph A. Balzano](#) and [Broadway Marine](#) Terminals), [Port of Paulsboro](#), and the [Port of Salem](#).

- The SJPC specialize in labor-intensive bulk and break-bulk cargo. It is a \$77.6 billion economic dynamo supporting 191,000 jobs across three states. The SJPC and the 40+ port-related businesses are among Camden's largest employers and taxpayers.⁵
- Cargo off-loaded at the these terminals are within the industrial/commercial epicenter of 100 million Americans and the industrial heartland of America and eastern Canada. "South Jersey port terminals are bustling with activity as the economy rebounds and responds to the pent-up demand, according to Brendan Dugan, assistant executive director and director of business development of the SJPC."⁶

Economic Developments: Southern NJ Ports will serve a vital role in the State's [Energy Master Plan](#) to achieve its Wind initiative - use turbines by 2035 & 100% clean energy by 2050.

- *Paulsboro Marine Terminal:* \$250 million investment is taking place for a new monopile manufacturing facility located at this site. It will "help to make the State the quintessential supply chain hub of the American offshore wind industry."⁷
- *Salem Port:* This site will serve as a hub to provide a location for essential staging, assembly, and manufacturing activities related to offshore wind along the East Coast.



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Sources: 5. [South Jersey Port Corporation](#), 2019

6. [NJB Magazine](#), July 5, 2021

7. [Offshore Wind Biz](#), April 20, 2021

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INFRASTRUCTURE: LAND

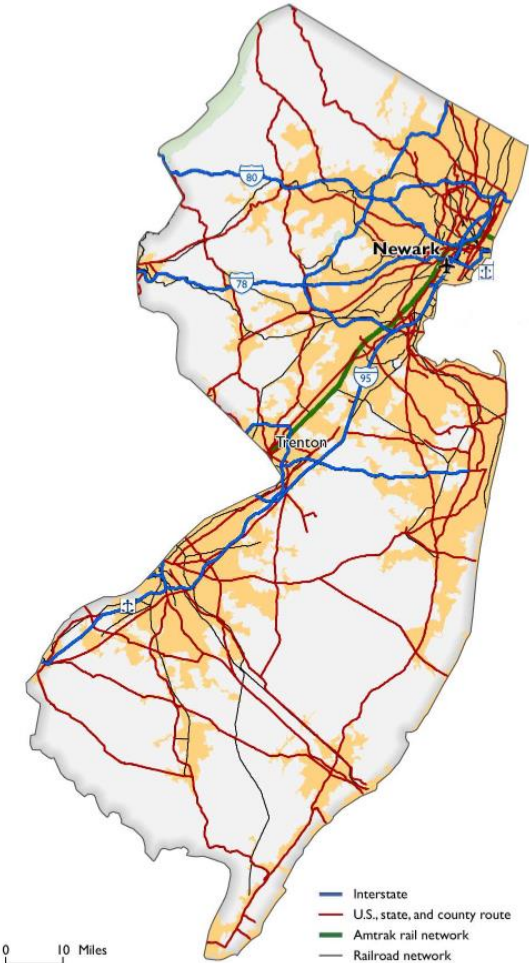
Nationally, in 2017 trucks carried [71.0 percent](#) of the value of the freight across U.S-North America. The American Truck Associations reported that for this same year, trucks average length of haul was 527 miles.

Located between New York City and Philadelphia, New Jersey is within a day's drive of 40 percent of the US population. A 500-mile radius of the Newark and Elizabeth waterfront area includes most of the northeastern U.S. and also the major Canadian metropolitan areas of Montreal, Ottawa and Toronto.

New Jersey's excellent land transportation network includes approximately 39,000 miles of [public roadways](#), which [trucks](#) carry 75 percent of the more than 600 million tons of goods moved through the state each year.

The State's [1,317 miles of freight railroads](#) serves as an alternative to move cargo more efficiently and timely through the region and across the nation.

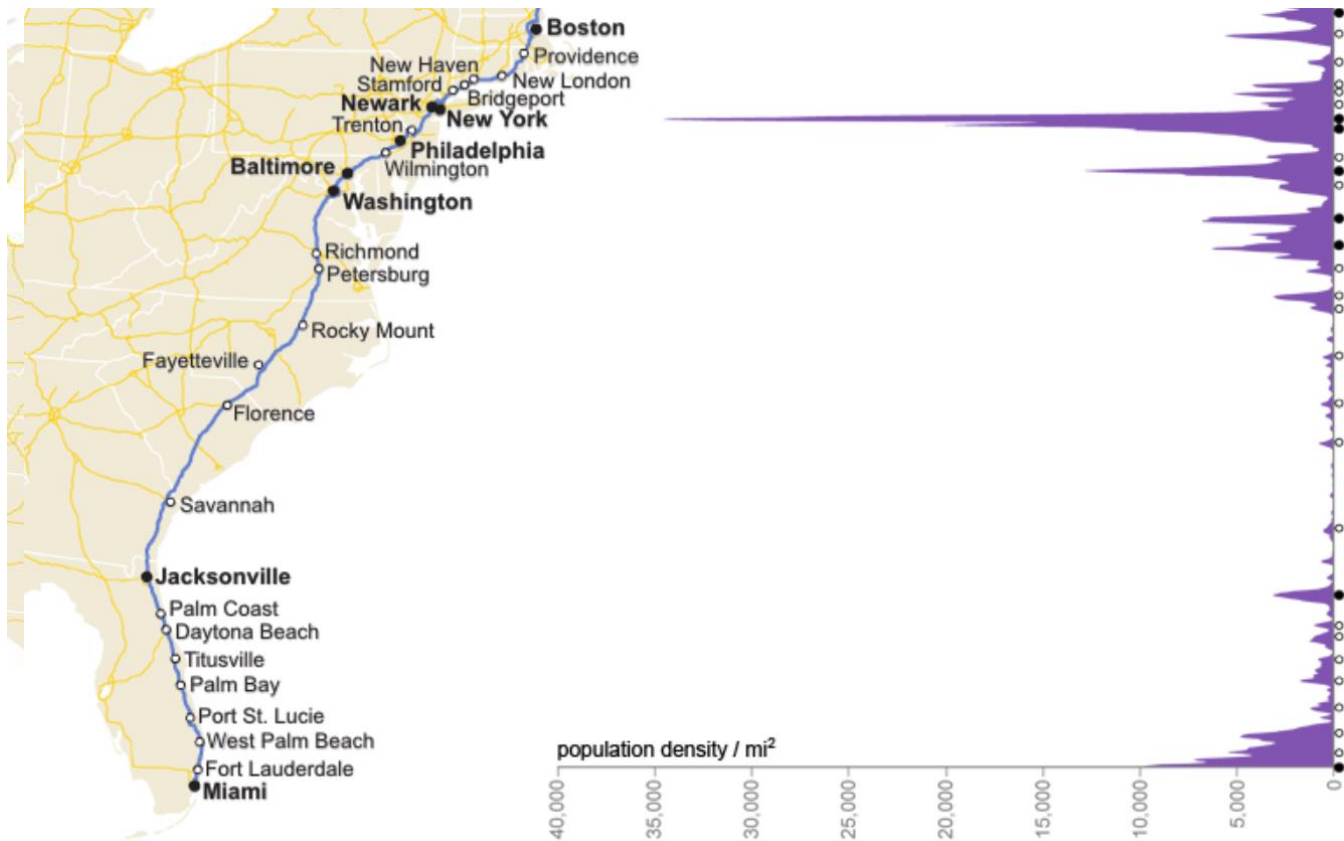
The [State's NJ Transit system](#) (rail, light rail, bus and paratransit services) pre-pandemic, carried over 900,000 passengers each day.



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SOURCE: U.S. Dept. of Transportation ([Bureau of Transportation Statistics](#))
NJ Dept. of Transportation, [NJ Transit 2019 Annual Report](#)
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I-95 POPULATION DENSITY PROFILE, 2010



This snapshot shows the population within a 5-mile radius of Route I-95. It illustrates New Jersey's densely populated area in relations to the route. (This data visualization was produced using U.S. Census Bureau tool with 2010 data.)



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Source: U.S. Census Bureau, 2010
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INFRASTRUCTURE: AIR

[Newark Liberty International Airport](#), located in Essex County, is managed by the Port Authority of New York and New Jersey. It serves about 50 carriers, including United Airlines, which is considered a major employer in the industry.

- ❑ The airport served more than 46.3 million total passengers in 2019. It was ranked the 5th busiest airport in the United States by international passenger traffic. In terms of total passengers, in 2020 it [ranked 16th in the U.S.](#) and the 43rd busiest airport in the world.
- ❑ A 2019 report revealed that approximately 23,000 people are employed at Newark Airport, it contributes \$33.6 billion in annual economic activity to the New York-New Jersey metropolitan region, and generates more than \$11 billion in annual wages.⁸
- ❑ The airport is also a major cargo hub! In 2019, the airport handled nearly 825,000 tons of air cargo. It ranked 14th among the top U.S. airports (2018) by landed weight of all-cargo operations. -- *This does not include aircraft carrying passengers that also may be carrying cargo.*
 - In 2020, with passenger travel down due to the pandemic, the agency presented an initiative to prequalified firms to lease, operate and maintain two of the airport's major cargo buildings through renovations to dramatically enhance Newark Liberty's air cargo operations.

[Teterboro Airport](#), considered a general aviation reliever airport, is located in Bergen County.

- ❑ A 2019 report found that this airport supports more than 5,000 jobs paying \$362 million in annual wages and generates nearly \$1.2 billion in annual sales activity.⁸



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Source: [8. Port of NY/NJ Airport Traffic Report, 2019](#)
[Bureau of Transportation Statistics](#)

US Airports Council & World Airport Codes
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

INFRASTRUCTURE: AIR

[Atlantic City International Airport](#) is a joint civil-military airport located in Egg Harbor Township, New Jersey. Managed by South Jersey Port Corporation, this airport is 12 miles from Atlantic City and 60 miles from Philadelphia, PA.

- One published report found that passenger volume at Atlantic City International Airport was approximately 1.2 million during the year 2016. It also revealed that the airport contributed \$678 million in economic activity to the New Jersey region, employs over 2,700 people, and provided over 7,700 jobs to the region. Commercial and general aviation activities at Atlantic City International Airport provides over 700 jobs. [9](#)

[William J. Hughes Technical Center](#), home to the Federal Aviation Administration and located at the Atlantic City International Airport, is a vital part of the nation's air transit system. The Technical Center, which is a premier aviation research, development, test and evaluation center, is at the forefront of development for NextGen, the Federal Aviation Administration's new National Airspace System.

- Research projects include aviation and drone development. As e-commerce continues to surge, the need for improvements and enhancements to this technology will highlight the value this aviation technical center site serves New Jersey, the nation, as well as the world!



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Source: [9. Port of NY/NJ Airport Traffic Report, 2016](#)
Atlantic City International Airport
USDOT, Federal Aviation Administration
Prepared by New Jersey Department of Labor & Workforce
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DETAILED INDUSTRY ANALYSIS



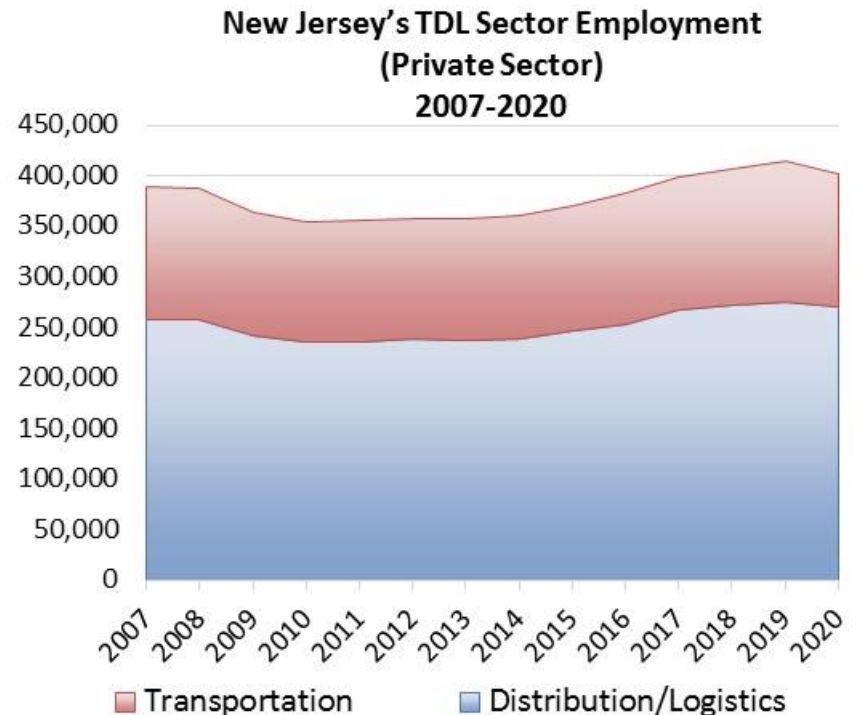
2010 – 2020 EMPLOYMENT TREND BY TWO MAJOR COMPONENTS

TDL IS COMPRISED OF TWO MAJOR COMPONENTS

The industry sector's employment is comprised of two-thirds (67.5%) in the Distribution-Logistics sector and one-third (32.5%) in Transportation. This employment ratio has remained consistent for many years.

Private sector jobholding in TDL peaked at 389,521 in 2007 before the Great Recession took hold, driving employment down for the next three years (2008-2010); followed by stability between 2011-2015. The robust growth in e-commerce helped fuel TDL's employment growth over the next 4-years (2015-2019), which realized annual growth rates ranging between 2.0% - 4.3%, to address demand.

In 2020, the pandemic heightened the demand for added employment to address the shift towards e-commerce. However, over this same time period, major disruptions it caused to the supply chain and the overall economy resulted in a net loss of -3.3 percent to TDL's employment.

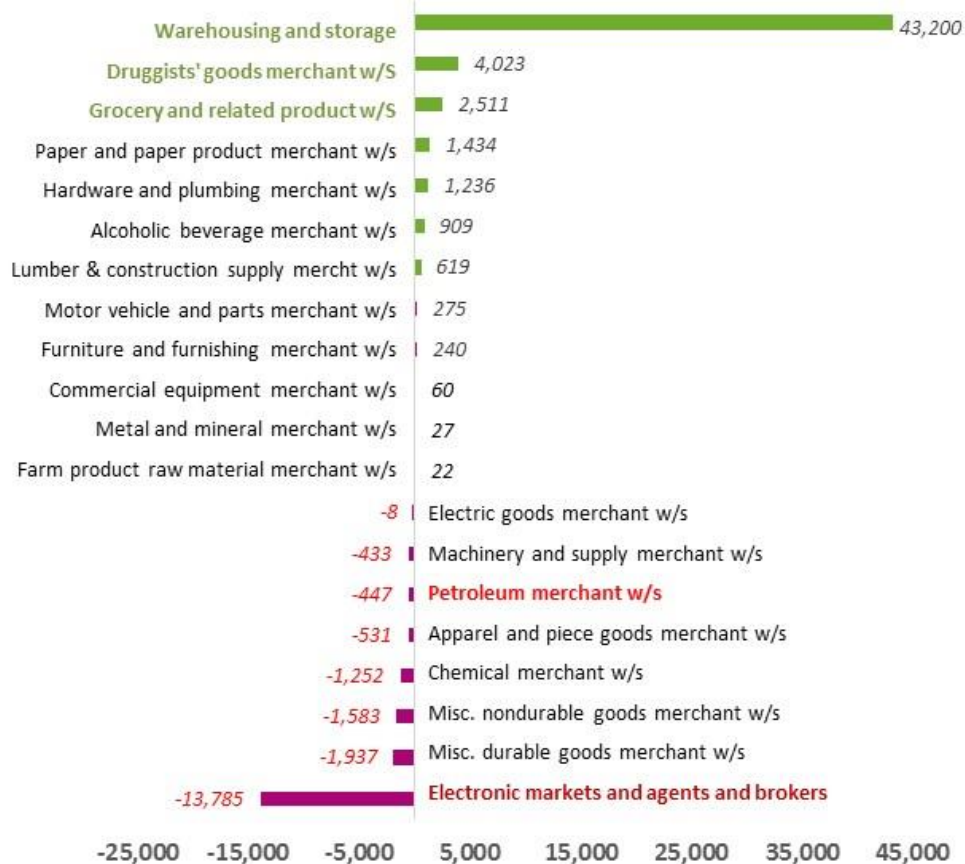


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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
Prepared by New Jersey Department of Labor & Workforce
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DISTRIBUTION/LOGISTICS SEGMENT

New Jersey's Distribution/Logistics Subsector Employment Private Sector: 2010-2020



Employment Gains and Losses 2010 - 2020

As TDL's employment grew over the past decade by 46,389 (or 13.1%), the Distribution & Logistic sector was a significant factor for its job growth. Between 2010 to 2020, this segment's net growth accounted for +34,579 (or 74.5%) of the jobholder gains.

In large part, the pandemic fueled the already rapidly growing e-commerce, which intensified the need for even more workers in the **Warehousing and Storage** subsector. This subsector gained 43,200 (or 161.7%) jobs over the 10-year period as warehouses and storage facilities continued to spring up along the New Jersey Turnpike and the state's other vital roadways and port areas. **Druggists & Grocery related product wholesalers** also saw significant gains.

Conversely, **Electronic Markets and Agents and Brokers** lost the most workers and percentage of workers over the period (-13,785 or -54.4%, respectively) while **Petroleum Merchant Wholesalers** also dropped by a large percentage as well (-18.3%).

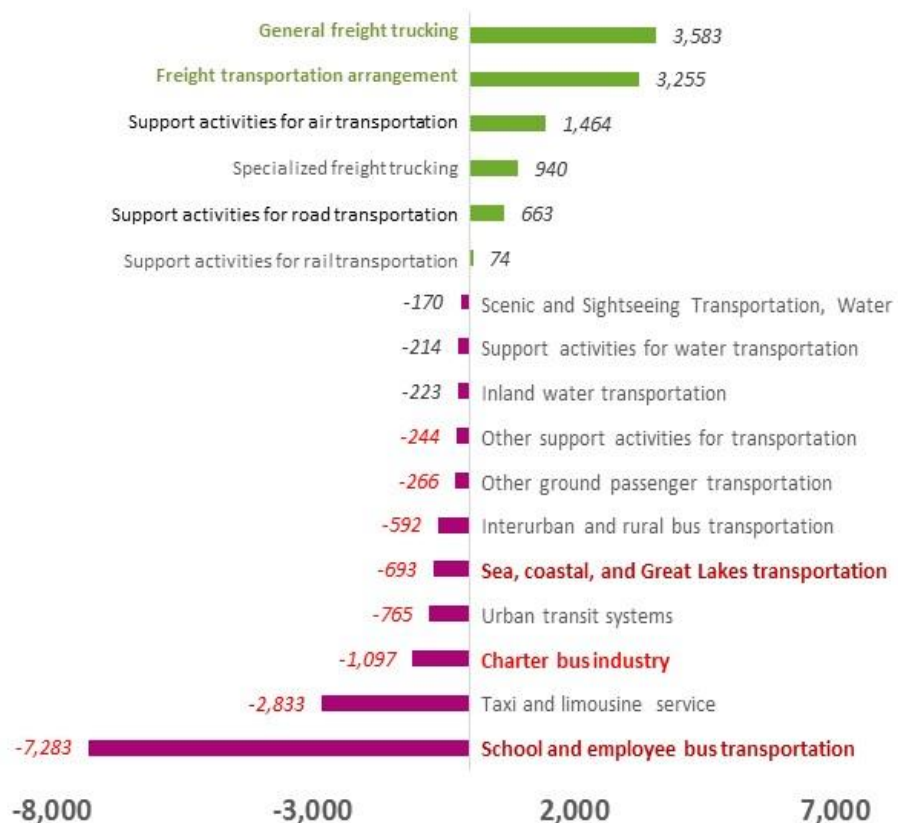


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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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TRANSPORTATION SEGMENT

New Jersey's Transportation Subsector Employment Private Sector: 2010-2020



Employment Gains and Losses 2010 - 2020

The Transportation segment of TDL increased by approximately 10.0 percent (or 11,810 jobholders) from 2010 to 2020.

General Freight Trucking and **Freight transportation arrangement** experienced significant employment growth (+6,838), an increase of 15.0 & 39.7%, respectively.

School and employee bus transportation lost the most workers (-7,283 or -50.9%). **Sea, Coastal and Great Lakes Water Transport** and **Charter Bus Industry** dropped the largest percentage (-68.8% and -62.0%, respectively), though from a low employment base.

(It is important to note that the transportation segment contains several industries that are suppressed due to disclosure issues.)



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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INDUSTRY GROUPS

DISTRIBUTION/LOGISTICS VERSES TRANSPORTATION

In 2020, the vast majority (74.5%) of employment in the TDL cluster was in the distribution segment.

The six top-ranking industries in the distribution segment together accounted for 64.5 percent of TDL private sector employment.

Couriers and General Freight Trucking accounts for 44.2 percent of the jobs in the transportation segment.

Distribution/Logistics Segment		
NAICS	Industry	Employment
4931	Warehousing and storage	69,910
4244	Grocery and related product wholesalers	31,247
4234	Commercial equip. merchant wholesalers	28,526
4242	Druggists' goods merchant wholesalers	15,780
4236	Electric goods merchant wholesalers	14,690
4238	Machinery & supply merchant wholesalers	14,313

Transportation Segment		
NAICS	Industry	Employment
4921	Couriers	30,136
4841	General Freight Trucking	27,515
4885	Freight Transportation Arrangement	11,457
4842	Specialized Freight Trucking	8,810
4922	Local Messengers and Local Delivery	8,115
4854	School and Employee Bus Transportation	7,037

Note: Employment data in some transportation industries have been omitted due to disclosure restraints.

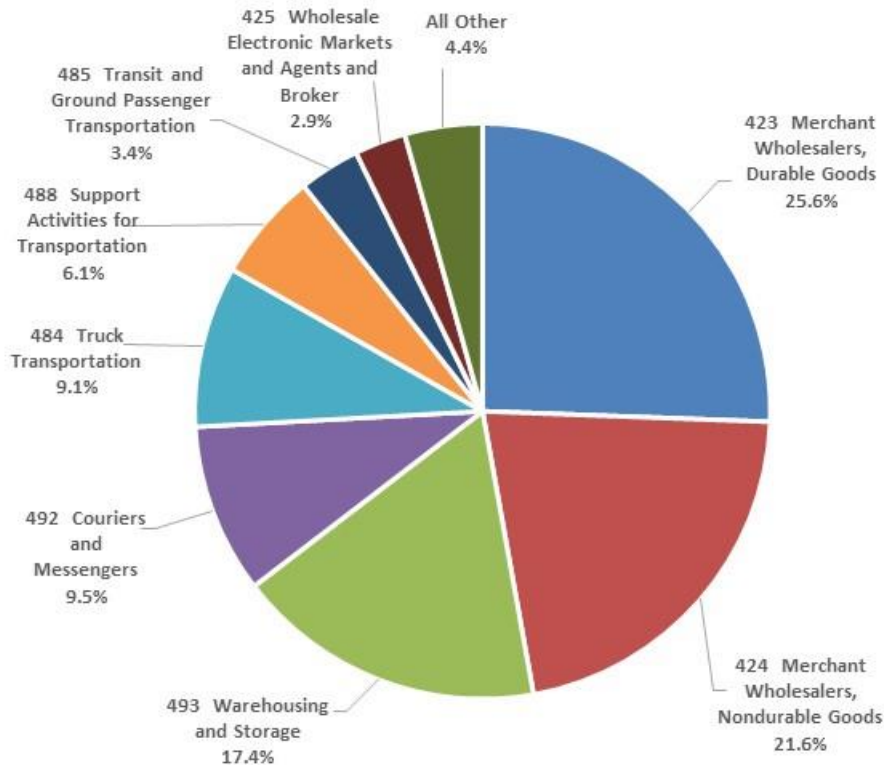


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Source: NJ Department of Labor & Workforce Development,
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TOP INDUSTRY SUBSECTORS BY EMPLOYMENT

New Jersey's TDL's Subsectors by Employment
Private Sector: 2020



In 2020, TDL's three top-ranking industry subsectors accounted for 64.6 percent of total jobs

Wholesalers of Durable Goods and Wholesalers of Nondurable Goods were TDL's largest industry employers. Combined, they accounted for 47.2 percent of TDL employment.

Due to significant growth in e-commerce, New Jersey's Warehousing and Storage subsector has placed it as the State's third largest TDL industry employer, accounting for 17.4 percent of New Jersey's TDL jobs.



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Source: NJ Department of Labor & Workforce Development,
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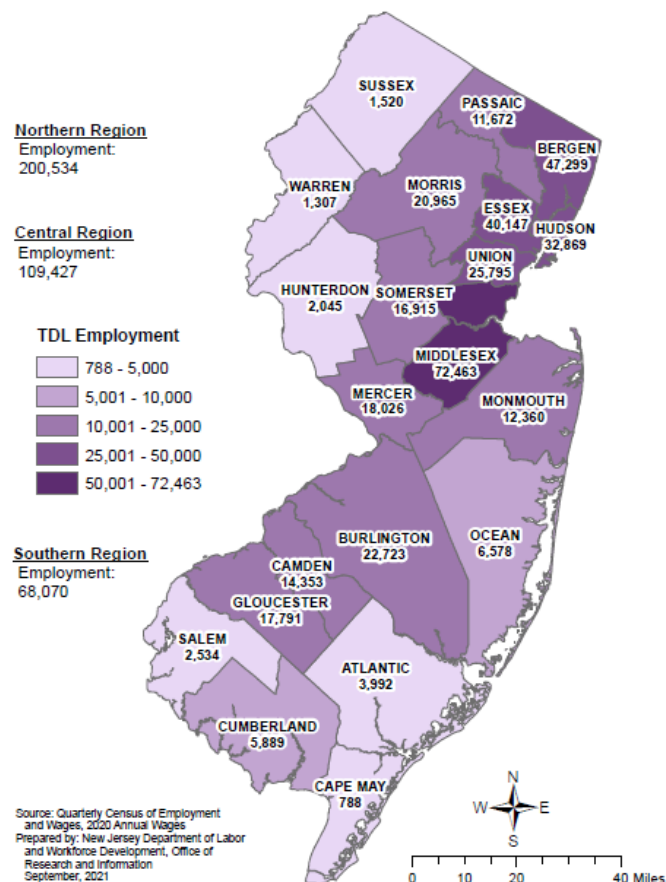
TDL EMPLOYMENT BY COUNTY

Middlesex (18.1%), Bergen (11.8%), Essex (10.0%), Hudson (8.2%), and Union (6.5%) counties accounted for more than half (54.5%) of New Jersey's TDL jobs in 2020. These counties are advantageously located in close proximity to the ports of Newark and Elizabeth, as well as major highways, such as the NJ Turnpike.

Other areas in the state that have substantial concentrations of TDL employment include Burlington, Camden, and Gloucester counties, which are also in close proximity to the NJ Turnpike, as well as major arteries, such as I-295. These three counties are in close proximity to the Delaware River, the Ports of Camden and Paulsboro, and the City of Philadelphia. Collectively, these 3 counties accounted for 13.7 percent of the state's TDL employment.

Mercer County has become more prominent as a center of TDL employment. Jobholding has more than doubled (+111.3%) in the county since the end of the '*Great Recession*': from 8,530 (2009) to over 18,000 (2020).

TDL Employment by County, 2020

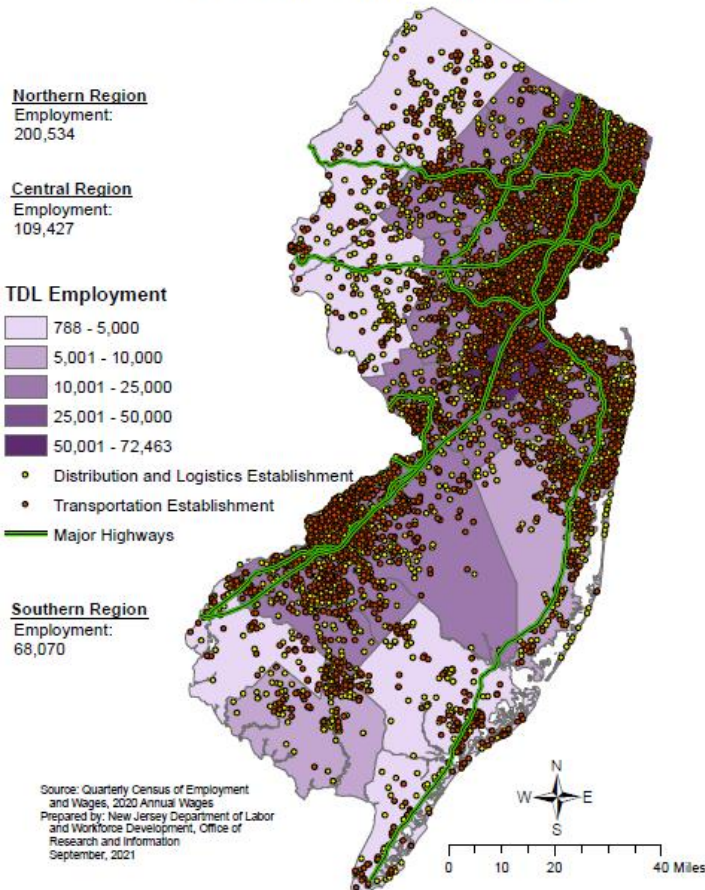


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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), 2020
Prepared by New Jersey Department of Labor & Workforce
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TDL ESTABLISHMENT MAP

TDL Establishment Map, 2020



Plotting TDL establishments along major roadways illustrates the significance of the state's highway system to the industry cluster. They serve as the arteries of New Jersey's vital port system to distribute goods to and from all over the world.

"Given its proximity to a range of transportation options and the major ports, New Jersey is one of the hottest markets for industrial space catering to the e-commerce and logistics industries in North America,"

....Brian Fiumara, executive vice president,
Capital Markets, CBRE

(SOURCE: [New York CityBizList](#), March 31, 2019)

Note: 5.7 percent of employment was unidentifiable by region



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#)
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TDL'S EMPLOYMENT BY REGION/COUNTY

Area	Establishments	2020 Annual Averages		Total Wages	Employment %
		Employment	Wages		
New Jersey	24,669	401,005	\$75,244	\$30,173,031,925	100.0%
Northern Region	12,045	200,534	\$81,558	\$16,355,178,305	50.0%
Bergen	3,540	47,299	\$78,278	\$3,702,459,799	
Essex	1,549	40,147	\$81,104	\$3,256,102,208	
Hudson	1,575	32,869	\$70,305	\$2,310,841,881	
Union	1,514	25,795	\$82,129	\$2,118,516,383	
Morris	1,387	20,965	\$95,158	\$1,994,993,294	
Somerset	770	16,915	\$111,847	\$1,891,889,097	
Passaic	1,111	11,672	\$63,198	\$737,644,252	
Hunterdon	211	2,045	\$77,072	\$157,613,048	
Sussex	209	1,520	\$59,990	\$91,184,212	
Warren	179	1,307	\$71,870	\$93,934,131	
Central Region	5,293	109,427	\$63,463	\$6,944,531,841	27.3%
Middlesex	2,678	72,463	\$63,493	\$4,600,918,173	
Mercer	611	18,026	\$64,314	\$1,159,315,699	
Monmouth	1,265	12,360	\$66,577	\$822,890,091	
Ocean	739	6,578	\$54,942	\$361,407,878	
Southern Region	2,931	68,070	\$55,722	\$3,793,027,757	17.0%
Burlington	844	22,723	\$59,736	\$1,357,382,798	
Gloucester	523	17,791	\$50,785	\$903,519,460	
Camden	834	14,353	\$57,907	\$831,145,420	
Cumberland	250	5,889	\$49,649	\$292,381,974	
Atlantic	269	3,992	\$57,707	\$230,365,757	
Salem	99	2,534	\$54,150	\$137,217,062	
Cape May	112	788	\$52,050	\$41,015,286	
UNDISTRIBUTED	4,400	22,974	\$134,037	\$3,080,294,022	5.7%



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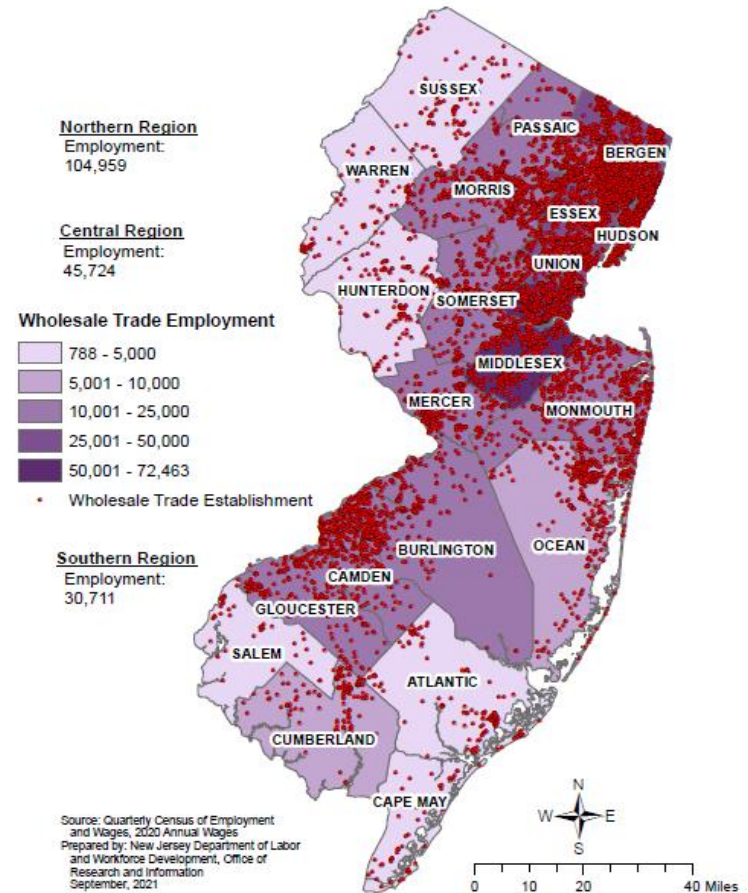
Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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WHOLESALE TRADE

In 2020, New Jersey's top-ranking counties for wholesale trade employment were Bergen (15.6%), Middlesex (14.2%), and Morris (6.9%) counties, in part, due to the state's high concentration of pharmaceutical firms. Combined, these three counties account for over one-third (36.7%) of employment in wholesale trade and 41.8 percent of jobholding within the druggist goods merchant wholesalers and chemical merchant wholesalers subsector industries. Statewide, private sector jobholding within the druggist goods merchant wholesalers and chemical merchant wholesalers subsector industries account for 10.8 percent of all wholesale trade industry employment.

The state's top industries by employment within wholesale trade were grocery and related products wholesalers (31,247 jobs or 15.6%) and professional and commercial equipment merchant wholesalers (28,526 jobs or 14.2%).

Wholesale Trade Establishments, 2020



Note: 9.6 percent of employment was unidentifiable by region



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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ANNUAL AVERAGE WAGES FOR TOP 10 INDUSTRIES (BY NJ EMPLOYMENT) IN DISTRIBUTION/LOGISTICS



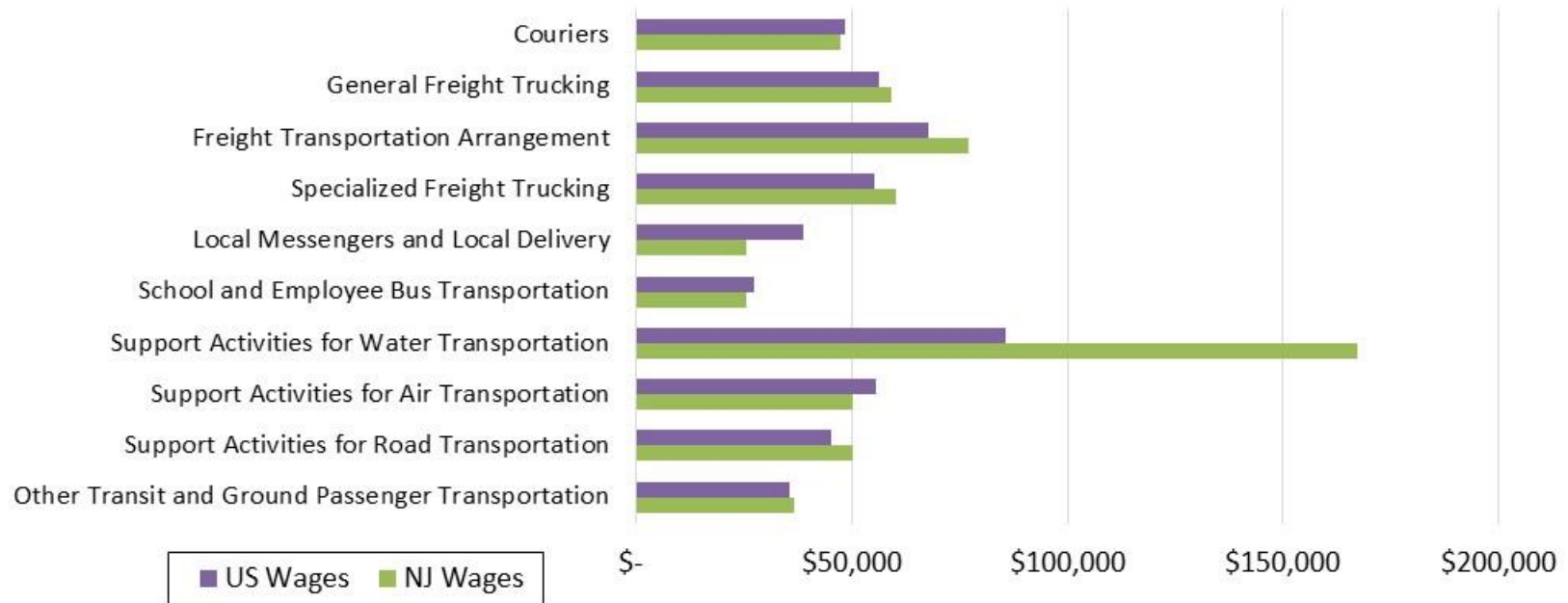
New Jersey's 2020 average annual wage for the Distribution/Logistics component of the TDL industry was \$81,647, ranging from a high of \$162,939 in "Drugs and Druggists' Sundries Merchant Wholesalers" to a low of \$44,249 in "Warehousing and Storage." The ten industries shown above account for 218,937 jobs, more than 54.6% of TDL's total employment.



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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ANNUAL AVERAGE WAGES FOR TOP 10 INDUSTRIES (BY NJ EMPLOYMENT) IN TRANSPORTATION



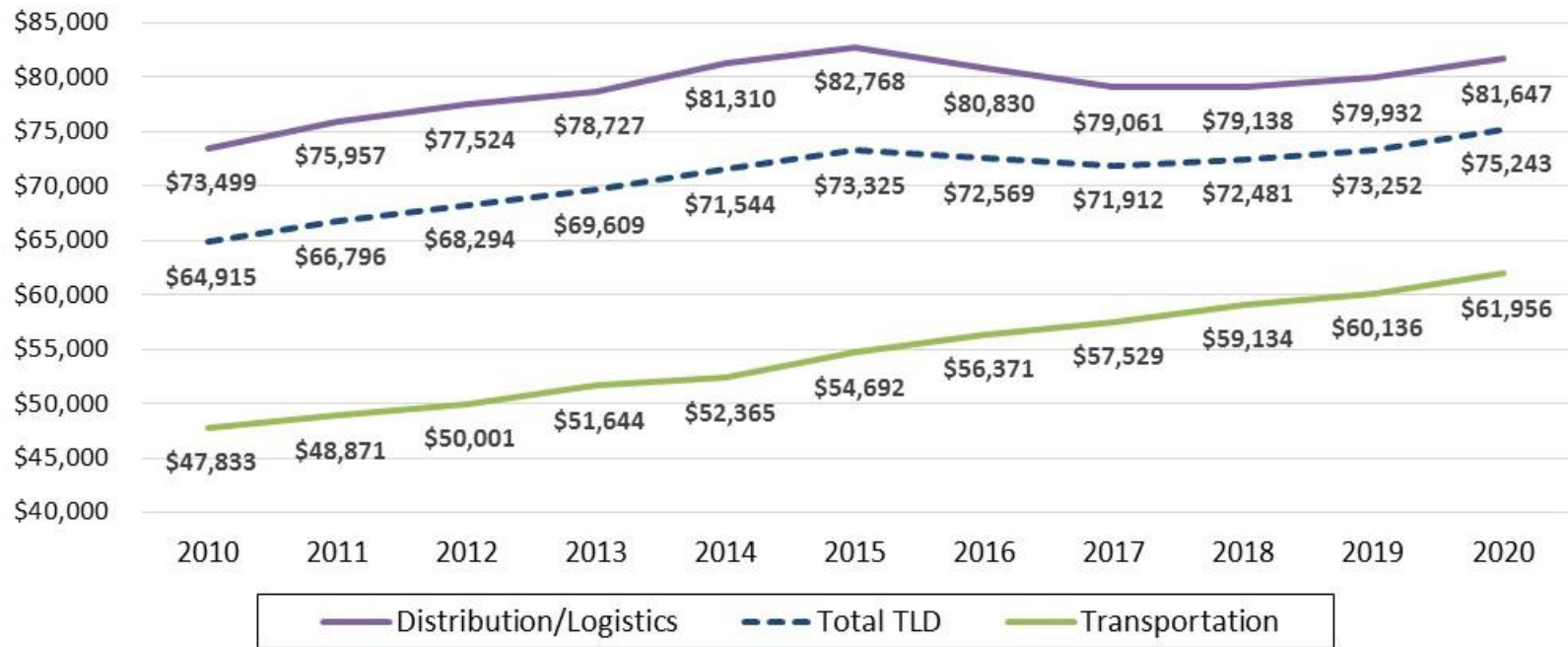
New Jersey's 2020 average annual wage for the Transportation component of the TDL industry was \$61,956, ranging from a high of \$167,364 in "Support Activities for Water Transportation" to a low of \$25,385 in "School and Employee Bus Transportation". The ten industries shown above account for 107,277 jobs, 26.8 percent of the total of the TDL employment. (Note: One subsector industry in this component was omitted due to disclosure restraints.)



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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WAGES 2010-2020 DISTRIBUTION/LOGISTICS VS. TRANSPORTATION



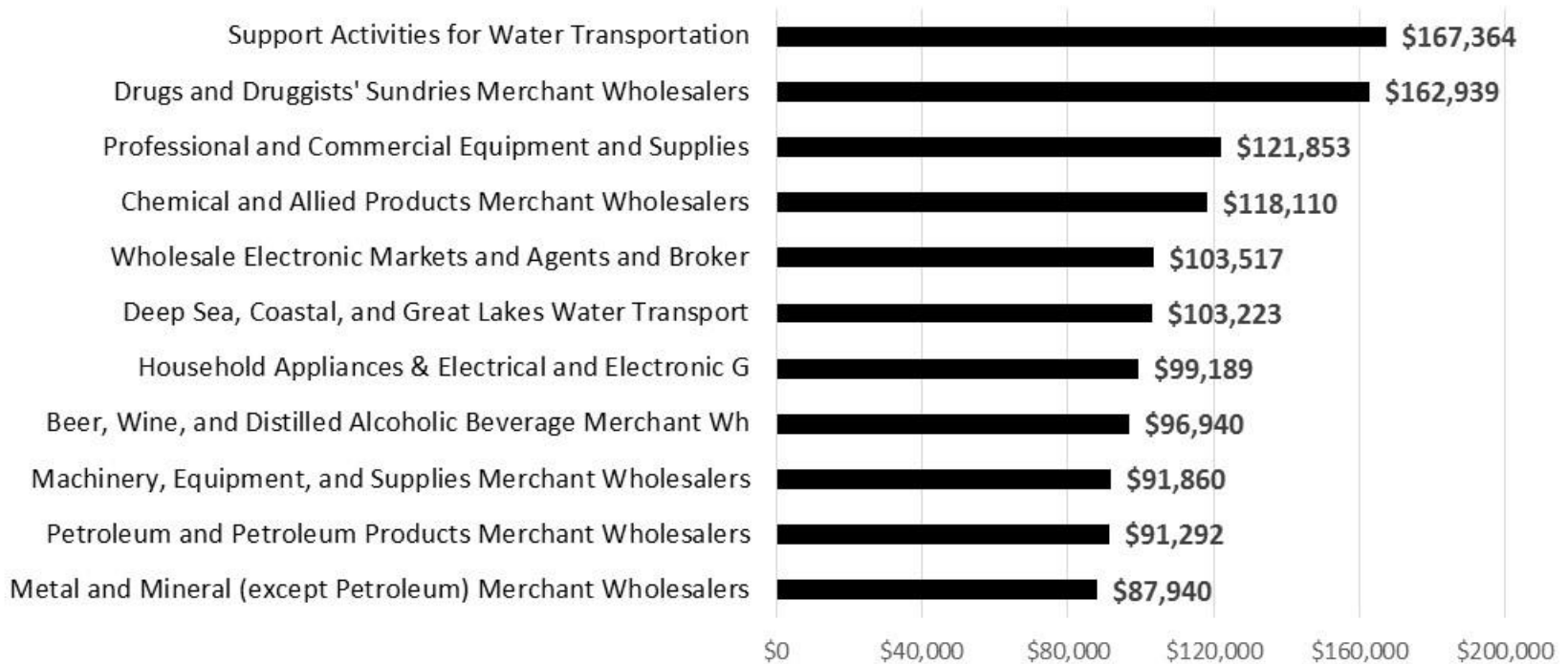
Average annual wages for workers in the distribution/logistics component ranged anywhere from 31.8 percent to 55.4 percent higher than those for transportation segment workers over the 10-year (2010 – 2020) period. Overall, total TDL wages increased at an average of 1.5 percent year to year during the same period.



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
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HIGHEST ANNUAL AVERAGE WAGES BY INDUSTRY SUBSECTORS



Analysis of 2020's average annual wage data by detailed industry reveals that more than half (52.2%) of all TDL's subsector industries had an average annual wage above \$70,000 in 2020. Those industries account for 49.6 percent of total TDL employment.

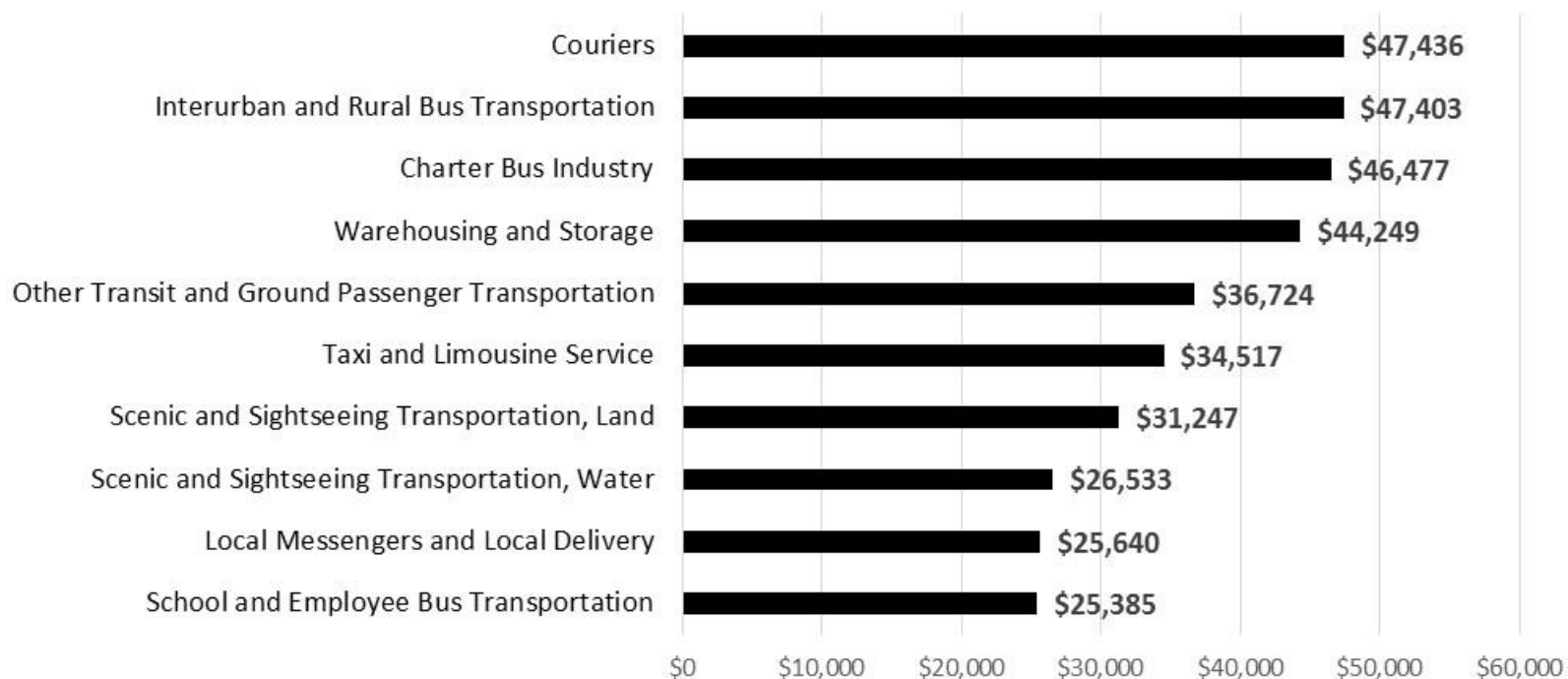
Note: Wage data for some transportation industries shown above have been omitted due to disclosure issues.



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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

LOWEST ANNUAL AVERAGE WAGES BY INDUSTRY SUBSECTORS



Analysis of 2020's average annual wage data by detailed industry reveals that approximately 21.7 percent of TDL's subsector industries had an average annual wage below \$50,000. These industries accounted for 30.3 percent of total TDL employment.

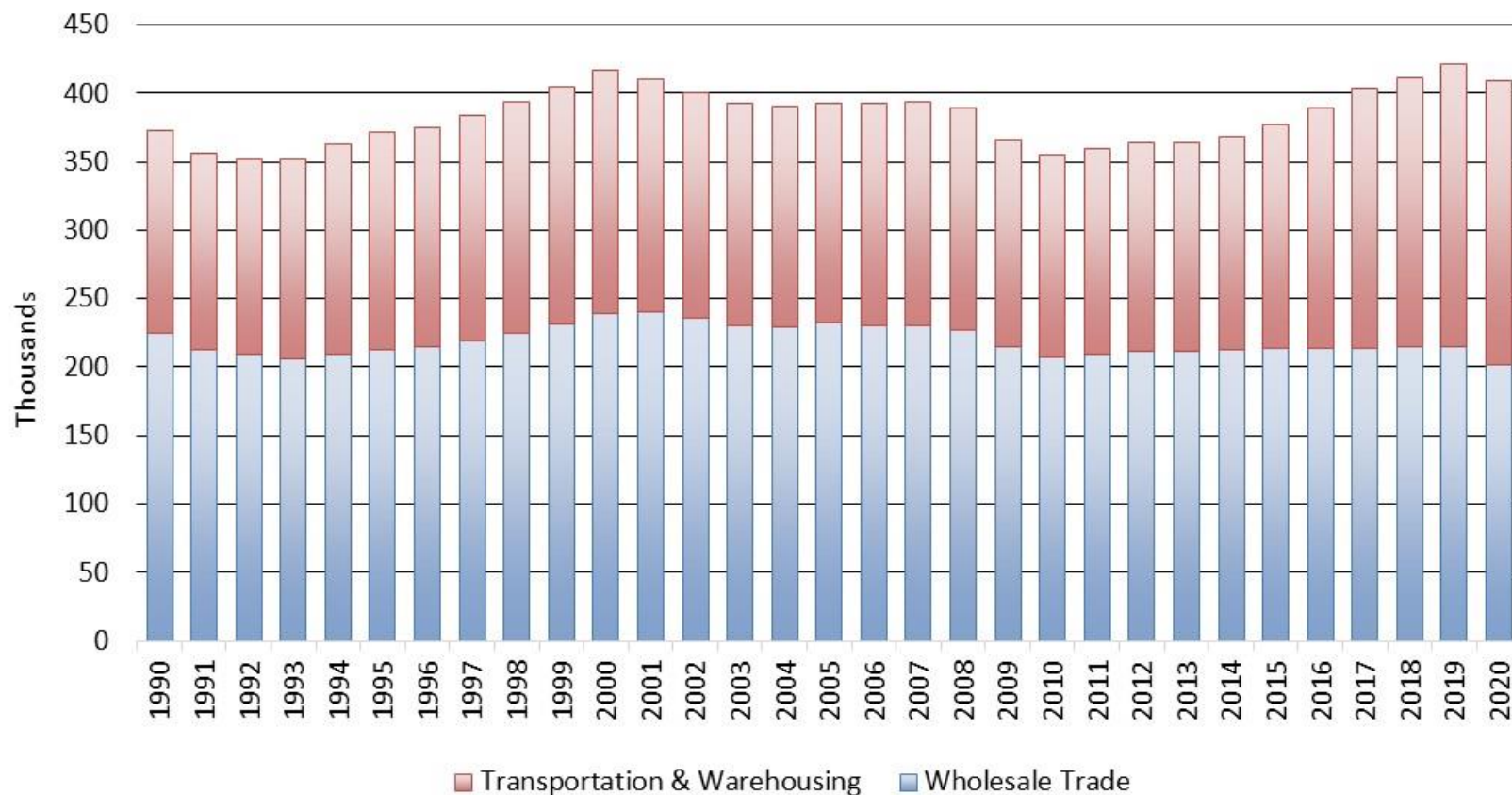


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Source: NJ Department of Labor & Workforce Development,
[Quarterly Census of Employment & Wages](#), Annual Averages
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

LONG-TERM INDUSTRY EMPLOYMENT TREND

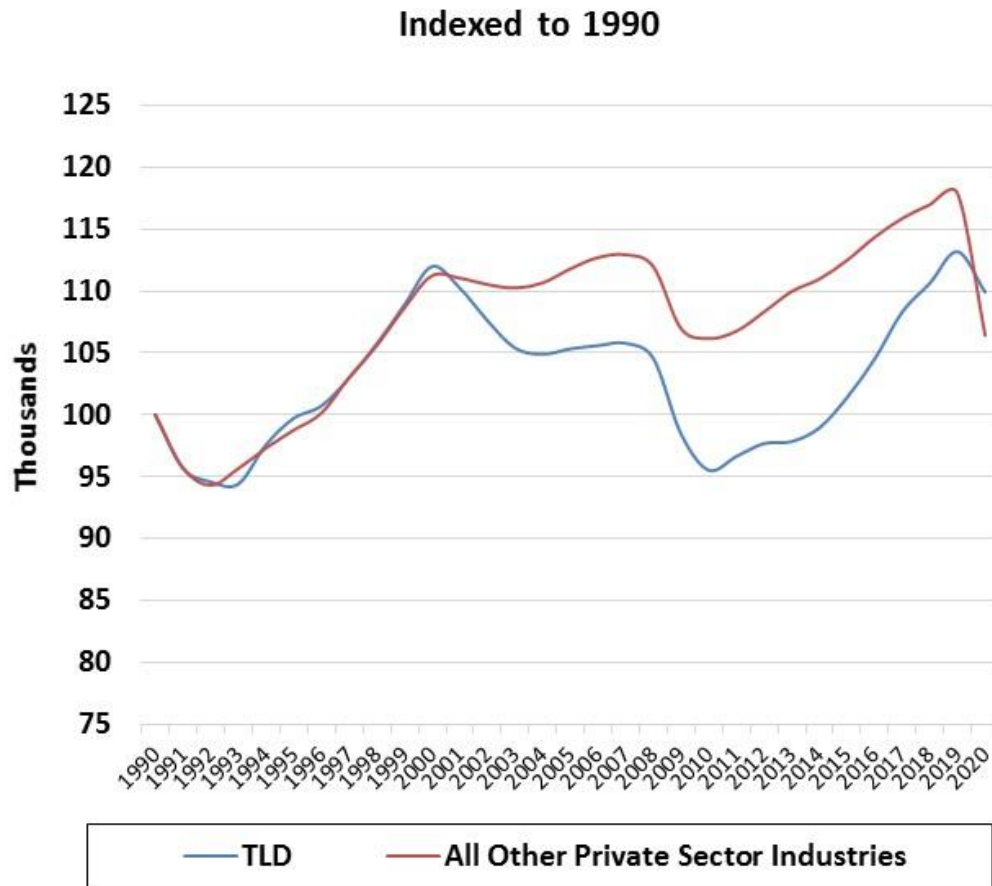
TRANSPORTATION & WAREHOUSING VS. WHOLESALE TRADE



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Source: NJ Department of Labor & Workforce Development,
[Current Employment Statistics](#), 1990-2019 Annual Averages
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TRANSPORTATION, DISTRIBUTION AND LOGISTICS VS. ALL OTHER PRIVATE SECTOR INDUSTRIES



TDL and Total Private Sector Employment Indexed to 1990

Following a decade of employment increases throughout the 1990s, New Jersey's TDL industry peaked in 2000. After several years of stabilization, the industry suffered heavy losses during the (December 2007 to June 2009) national 'Great Recession'.

TDL jobholding faced three years of contraction in the wake of the recession, with severe declines occurring between 2008 and 2010.

From 2010 until 2019, the sector had as a whole seen tremendous growth in New Jersey as the economy continued to grow.

In 2020, the pandemic had a devastating impact on employment and the economy. While TDL overall experienced significant job losses, the Warehousing & Storage subsector realized employment gains of 13.8 percent primarily due to the pent up demand for e-commerce (transactions conducted electronically).



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Source: NJ Department of Labor & Workforce Development,
[Current Employment Statistics](#), 1990-2019 Annual Averages
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

OCCUPATIONAL ANALYSIS



EMPLOYMENT BY MAJOR OCCUPATIONAL GROUP

Occupational Group	Employment	Percent of Cluster
53 Transportation and Material Moving Occupations	191,630	49.4%
43 Office and Administrative Support Occupations	62,730	16.2%
41 Sales and Related Occupations	42,720	11.0%
11 Management Occupations	23,560	6.1%
13 Business and Financial Operations Occupations	19,750	5.1%
49 Installation, Maintenance, and Repair Occupations	13,230	3.4%
51 Production Occupations	11,840	3.1%
15 Computer and Mathematical Occupations	6,240	1.6%

The transportation and material moving occupational group accounted for the greatest proportion of jobs in the TDL industry cluster attributing towards nearly half of TDL's total employment.

Almost two-thirds (65.1%) of the jobholding in the transportation and material moving occupation were employed in the 'Warehousing and Storage', 'Truck Transportation', 'Couriers' or 'Merchant Wholesalers, Nondurable Goods' industry.

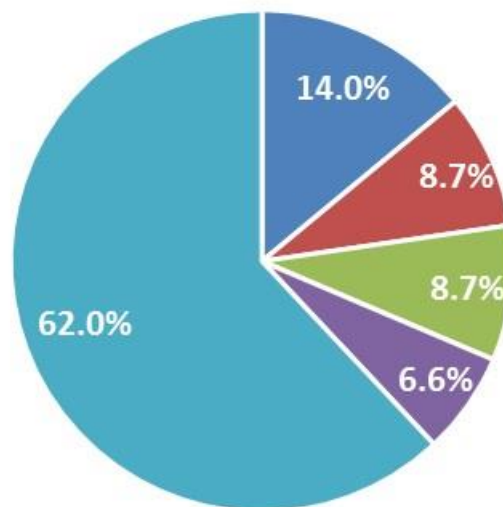


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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
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PERCENTAGE OF EMPLOYMENT BY OCCUPATION

Four occupations in the TDL cluster account for over one-third (35.6%) of TDL's jobholdings



- Laborers and Freight, Stock, and Material Movers, Hand
- Heavy and Tractor-Trailer Truck Drivers
- Packers and Packagers, Hand
- Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
- Balance of TLD Jobs



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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TOP TDL OCCUPATIONS BY EMPLOYMENT

Occupation	Employment	Salary	Percent of TDL Jobholding
53-7062 Laborers and Freight, Stock, and Material Movers, Hand	55,080	\$38,506	14.1%
53-3032 Heavy and Tractor-Trailer Truck Drivers	34,460	\$49,210	8.8%
53-7064 Packers and Packagers, Hand	33,940	\$33,337	8.7%
41-4012 Sales Representatives, Wholesale and Manufacturing, Except Technical & Scientific Pdts	25,590	\$89,045	6.6%
53-3033 Light Truck Drivers	13,720	\$45,024	3.5%
53-7065 Stockers and Order Fillers	11,160	\$41,632	2.9%
43-4051 Customer Service Representatives	10,710	\$44,997	2.7%
53-1047 First-Line Supervisors of Transportation and Material-Moving Workers, Except Aircraft Cargo Handling Supervisors	9,350	\$68,471	2.4%
53-3058 Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	9,200	\$41,607	2.4%
53-7051 Industrial Truck and Tractor Operators	8,300	\$47,548	2.1%
11-1021 General and Operations Managers	7,990	\$182,453	2.0%
43-5071 Shipping, Receiving, and Inventory Clerks	7,260	\$41,536	1.9%
43-3031 Bookkeeping, Accounting, and Auditing Clerks	5,850	\$48,603	1.5%
43-9061 Office Clerks, General	5,780	\$37,962	1.5%
43-1011 First-Line Supervisors of Office and Administrative Support Workers	5,020	\$71,442	1.3%
41-3091 Sales Representatives of Services, Except Advertising, Insurance, Financial Svcs, & Travel	4,570	\$82,195	1.2%
11-2022 Sales Managers	3,840	\$162,559	1.0%
43-6014 Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3,810	\$43,631	1.0%
41-1012 First-Line Supervisors of Non-Retail Sales Workers	3,330	\$105,937	0.9%
13-2011 Accountants and Auditors	3,160	\$88,879	0.8%

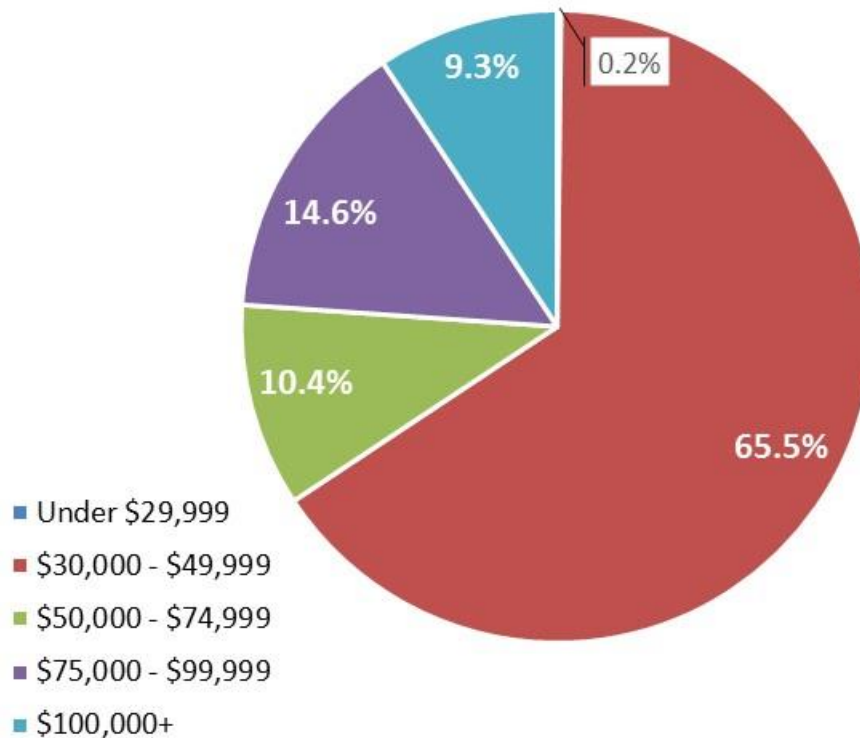


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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

OCCUPATIONAL EMPLOYMENT BY SALARY RANGE

Breakdown of Wages by Occupation



The vast majority of New Jersey's TDL workers earn a salary between \$30,000-\$49,999

Analysis of work-related occupations by salary range shows that nearly two-thirds of TDL workers are employed within occupations that earn an average salary between \$30,000 to \$49,999. These occupations accounted for approximately two-fifths of TDL's job-related titles.

Over nine percent of the employment in this cluster was found to be within nearly 20% of occupations that have an annual salary averaging over \$100,000.

(Note: These figures exclude data that has been suppressed due to non-disclosure issues.)



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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

SIGNIFICANT TDL OCCUPATIONS RANKED BY HIGHEST AND LOWEST SALARY

Occupations with the Highest Annual Salary

Occupation	Employment	Salary	Percent of TDL Jobholding
11-1011 Chief Executives	100	\$267,574	<0.1%
11-9121 Natural Sciences Managers	530	\$205,847	0.2%
23-1011 Lawyers	250	\$204,411	0.1%
11-2030 Public Relations and Fundraising Managers	40	\$196,214	<0.1%
11-3131 Training and Development Managers	60	\$189,675	<0.1%
11-9111 Medical and Health Services Managers	70	\$184,412	<0.1%
11-1021 General and Operations Managers	7,990	\$182,453	2.3%
11-2021 Marketing Managers	1,010	\$178,496	0.3%
11-3031 Financial Managers	1,520	\$169,582	0.4%
11-3021 Computer and Information Systems Managers	840	\$165,128	0.2%

Occupations with the Lowest Annual Salary

Occupation	Employment	Salary	Percent of TDL Jobholding
51-9111 Packaging and Filling Machine Operators and Tenders	510	\$33,656	0.1%
53-7064 Packers and Packagers, Hand	33,940	\$33,337	9.6%
49-9098 Helpers--Installation, Maintenance, and Repair Workers	90	\$33,038	<0.1%
43-5021 Couriers and Messengers	ND	\$32,891	ND
53-7061 Cleaners of Vehicles and Equipment	730	\$31,342	0.2%
53-6031 Automotive and Watercraft Service Attendants	90	\$30,175	<0.1%
35-2021 Food Preparation Workers	50	\$29,567	<0.1%
41-2011 Cashiers	130	\$29,086	<0.1%
51-6031 Sewing Machine Operators	ND	\$27,486	ND
39-9098 Crematory Operators and Personal Care and Service Workers, All Other	620	\$26,621	0.2%

Note: ND represents data that has been suppressed due to non-disclosure issues.

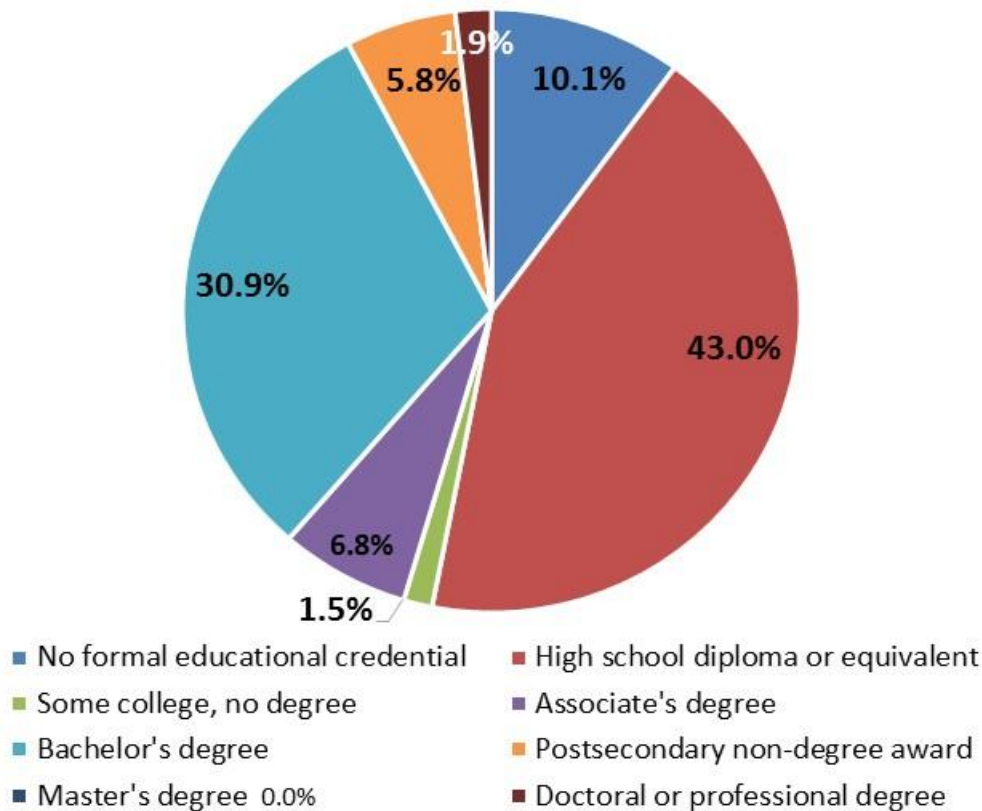


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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

OCCUPATIONAL EMPLOYMENT BY EDUCATIONAL REQUIREMENT

Breakdown of Occupation by Education



Educational requirements of TDL occupations

While more than 40 percent of the occupations within the TDL industry cluster require no further education beyond high school, many occupations such as truck drivers and forklift operators have licensing requirements.

Some jobs, especially those in secure areas such as shipping terminals or at airports, may also require additional screening or background checks.

Analyzing TDL's 2021 employment (*) revealed that almost 27 percent of its workforce is employed in occupations requiring education beyond high school.

* These figures exclude data that has been suppressed due to non-disclosure issues.



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Source: NJ Department of Labor & Workforce Development,
[Occupational Employment Statistics Wage Survey](#), 2020 data
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

WHO ARE THE WORKERS?



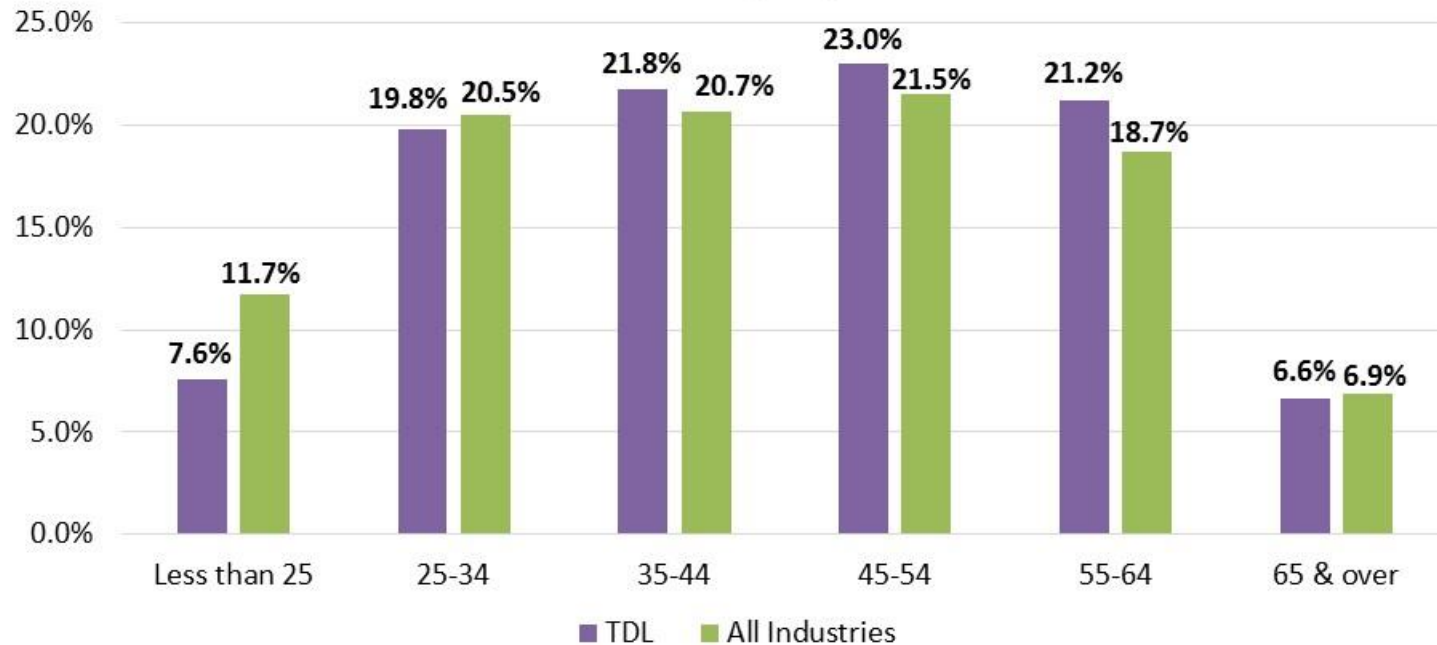
CHARACTERISTICS OF NEW JERSEY'S TDL RESIDENT WORKFORCE

- The American Community Survey (ACS), a product of the U.S. Census Bureau, gives insight to the characteristics of New Jersey residents who are employed in the TDL cluster.
- As the ACS is resident-based, it illustrates the characteristics of people who live in New Jersey and the industries that those residents work in rather than the characteristics of the workers who are employed in the Garden State.



TDL CLUSTER'S RESIDENT WORKFORCE BY AGE

Characteristics of the Workforce in New Jersey: 2019 By Age



New Jersey's TDL cluster resident workforce is typically older than that of other industries.

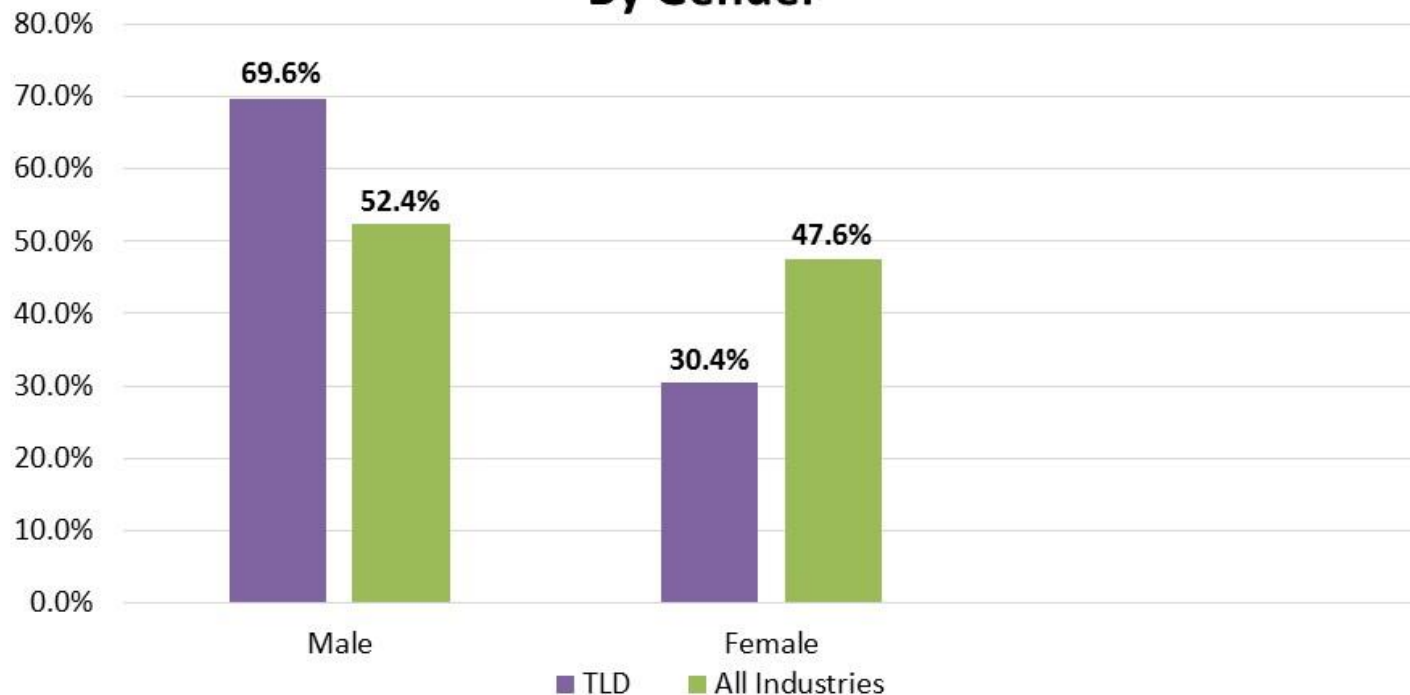


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Source: [U.S. Census Bureau – American Community Survey](#), 2014-18 5-year Estimates
Prepared by New Jersey Department of Labor & Workforce Development, December 2021

TDL CLUSTER'S RESIDENT WORKFORCE BY GENDER

**Characteristics of the Workforce in New Jersey: 2019
By Gender**



New Jersey's resident TDL workforce is predominately male.

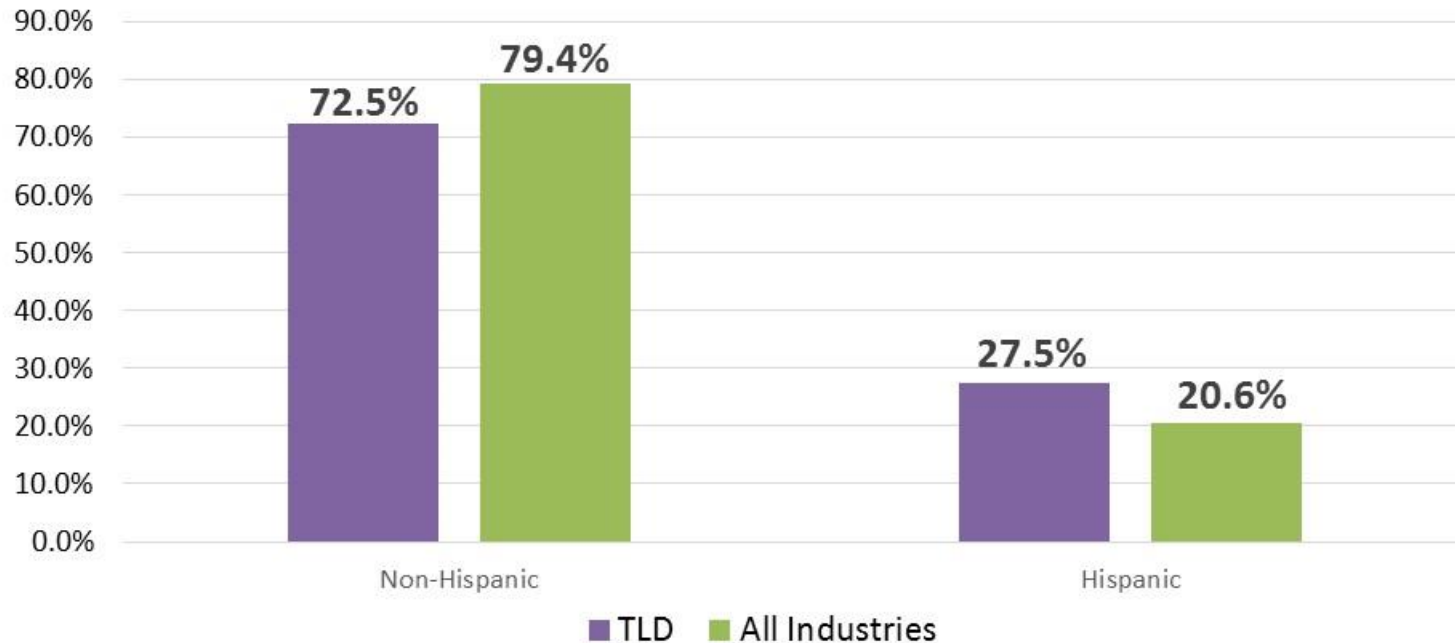


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Source: [U.S. Census Bureau – American Community Survey](#), 2018
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL CLUSTER'S RESIDENT WORKFORCE BY HISPANIC ORIGIN

**Characteristics of the Workforce in New Jersey: 2019
By Hispanic Origin**



In comparison to other industries, TDL had a larger share of the Hispanic resident workforce in 2019.

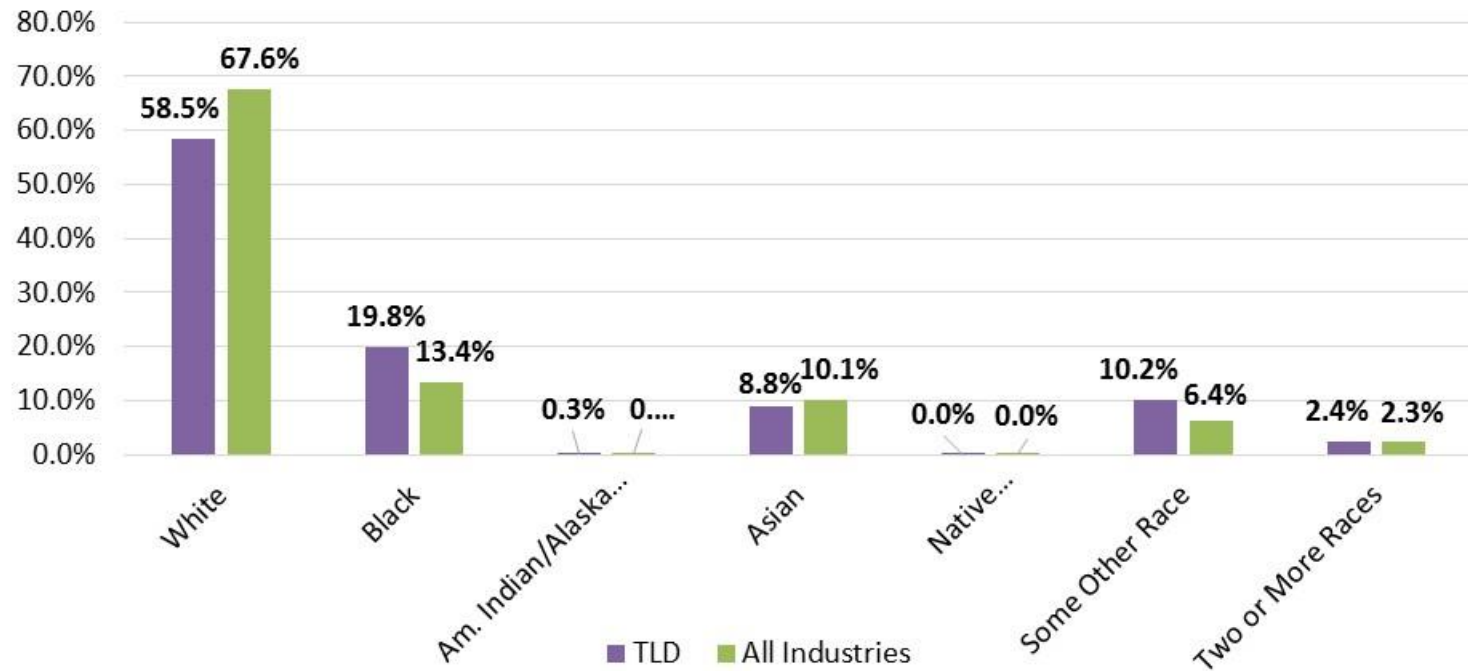


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Source: [U.S. Census Bureau – American Community Survey](#), 2017
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL CLUSTER'S RESIDENT WORKFORCE BY RACE

Characteristics of the Workforce in New Jersey: 2019 By Race



TDL has a larger share of the minority resident workforce.

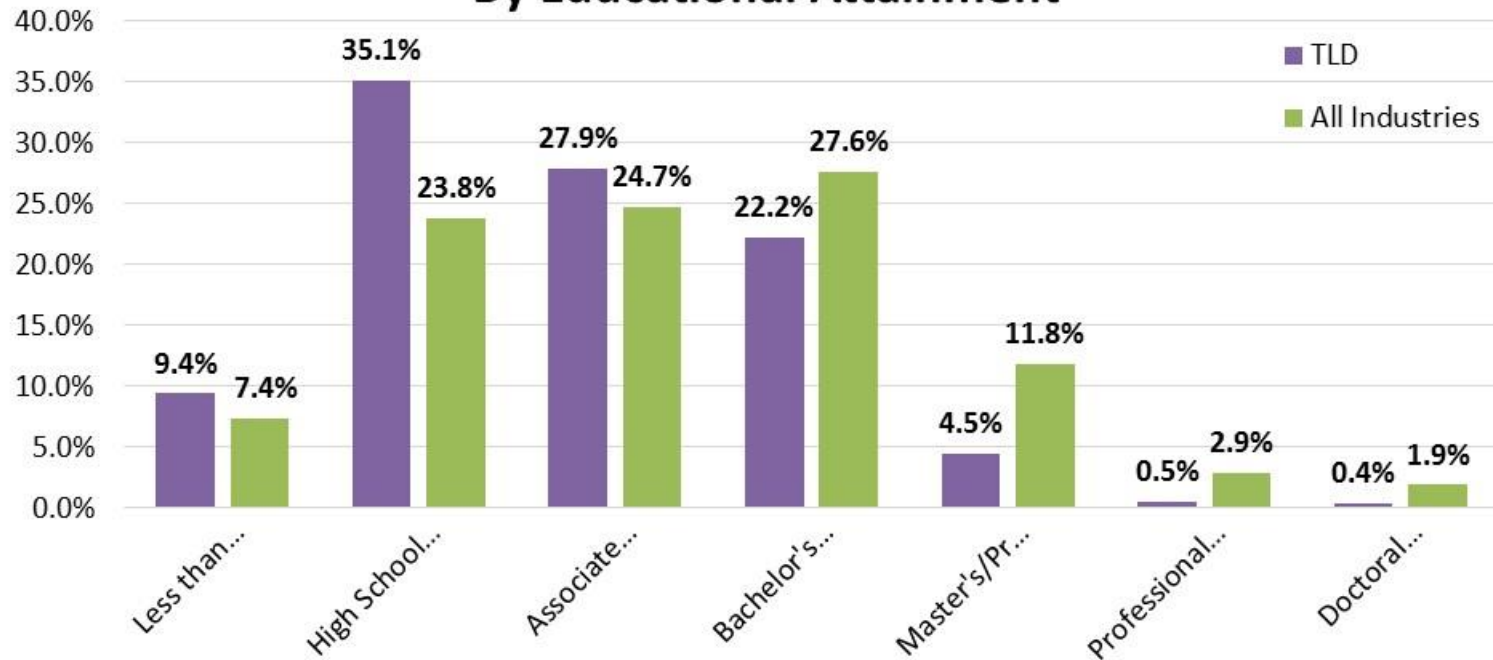


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Source: [U.S. Census Bureau – American Community Survey](https://www.census.gov/data/tables/2017/acs/american-community-survey.html), 2017
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL CLUSTER'S RESIDENT WORKFORCE BY EDUCATION LEVEL

**Characteristics of the Workforce in New Jersey: 2019
By Educational Attainment**



A large percentage of New Jersey resident TDL workers have no education beyond high school or Associates Degree/some college.



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Source: [U.S. Census Bureau – American Community Survey](#), 2017
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TYPE OF WORKERS TDL EMPLOYERS WERE LOOKING FOR IN 2020



JOB POSTINGS

Analyzing job postings is helpful for knowing what type of occupations employers are seeking. It also provides an insight to the related skills and educational attainment employers require (or at least desire). Therefore, the following section was added in order to help identify and provide information about related occupations within New Jersey's transportation, distribution, and logistics cluster employers were looking to recruit.

The findings are intended to help identify and increase awareness of what employers in this cluster are seeking from New Jersey's labor force. This information can be useful for a variety of purposes, such as informing job-seeker, economic developers, educational institutions, and many others about:

- ❖ Occupations that are in demand.
- ❖ 'Basic' & 'Technical' skills employers are looking for an applicant to possess.
- ❖ Educational requirements employers require/desire from prospective hires.

The New Jersey Department of Labor and Workforce Development through its agreement with Labor Insight-Burning Glass Technologies is able to provide the following labor market information aggregated from 2020 online employer job listings. This data provides valuable insight regarding current employer demand for characteristics such as skills and educational requirements. Note that this data is not meant to represent all available employment opportunities or employer requirements but rather should be viewed in terms of analysis of labor market demand.



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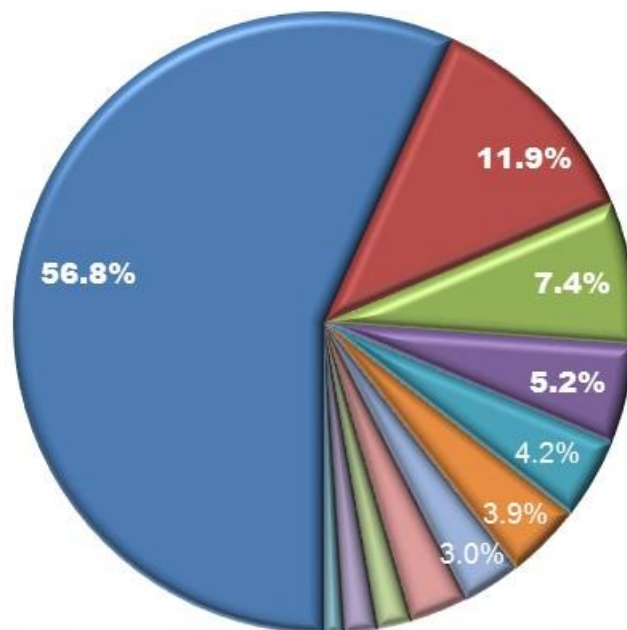
Source: Labor Insight Burning Glass Technologies
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL: OCCUPATIONAL POSTINGS

Job Postings: January-December 2020

New Jersey TDL Occupational Family Postings

- Transportation and Material Moving
- Office and Administrative Support
- Management
- Sales and Related
- Installation, Maintenance, and Repair
- Business and Financial Operations
- Computer and Mathematical
- Other
- Production
- Arts, Design, Entertainment, Sports, and Media
- Architecture and Engineering



In 2020, Transportation & Material Moving (56.8%) and Office & Administrative Support (11.9%) listings accounted for more than two-thirds (68.7%) of the 31,477 job postings for positions in the Transportation, Distribution & Logistics Cluster in New Jersey.

TDL Job Postings in Greatest Demand New Jersey: 2020

❖ Heavy & Tractor-Trailer Truck Drivers	9,179
❖ Laborers & Freight & Material Movers	4,988
❖ Light Truck or Delivery Svcs Drivers	1,125
❖ Driver/Sales Workers	988
❖ Production, Planning & Expediting Clerks	598
❖ Stock Clerks and Order Fillers	597
❖ Automotive Specialty Technicians	594
❖ Sales Reps, W/S & Mfg, (expt Tech Pdts)	582
❖ General & Operations Managers	544
❖ Merchandise Displayers & Window Trimmer	455
❖ Customer Service Representatives	428
❖ Managers, All Other	402
❖ Industrial Truck and Tractor Operators	338
❖ Retail Salespersons	337
❖ Bus Drivers, School or Special Client	270

The top 15 occupational postings (above) accounted for 68.1.0% of New Jersey's TDL industry related job postings in 2020.



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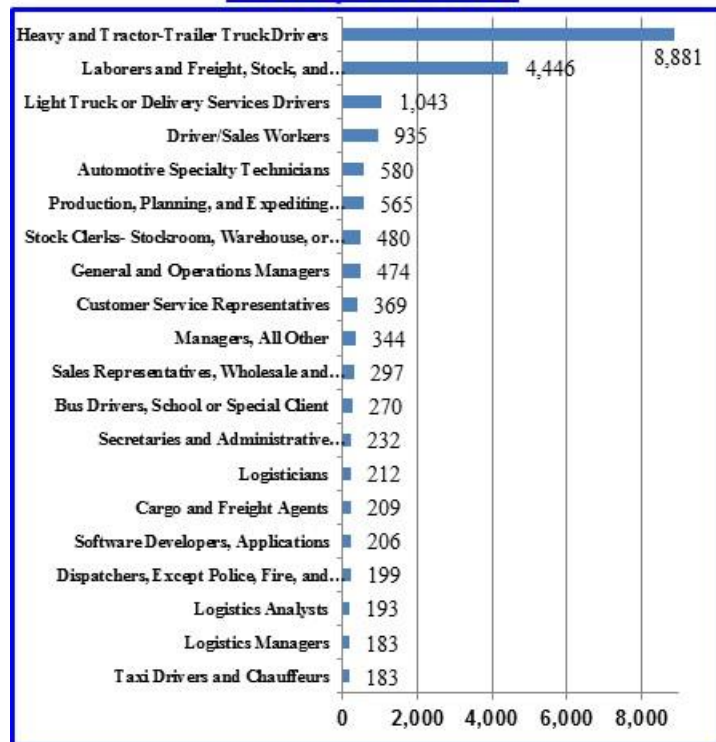
Source: Labor Insight Burning Glass Technologies
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL: SECTOR OCCUPATIONS

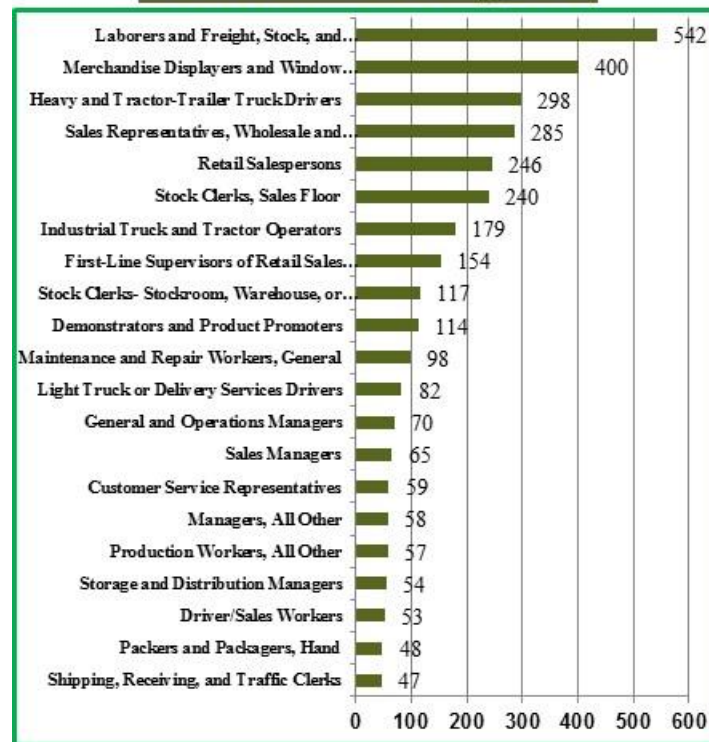
Job Postings: January-December 2020

The following were some of the most frequently listed positions in 2020 by companies within this cluster for employment in New Jersey.

Transportation



Distribution & Logistics



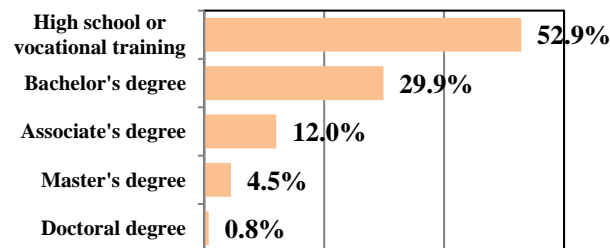
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Source: Labor Insight Burning Glass Technologies
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

TDL: SKILLS IN DEMAND

In addition to education...

Educational Attainment

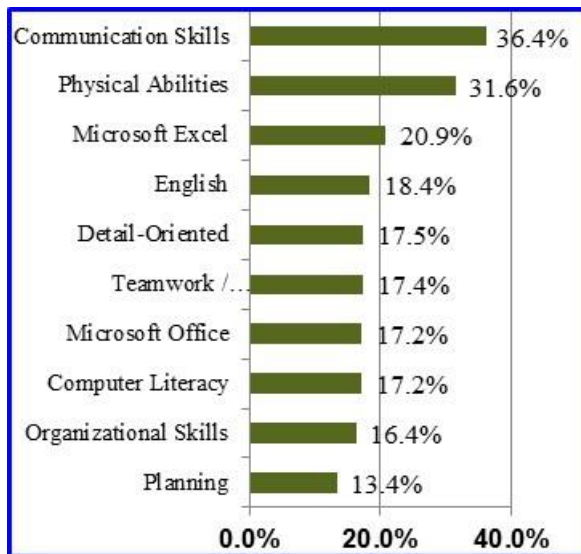


Note: 62% of the 32,767 records have been excluded because they did not include a degree level.

Job Postings:

January-December 2020

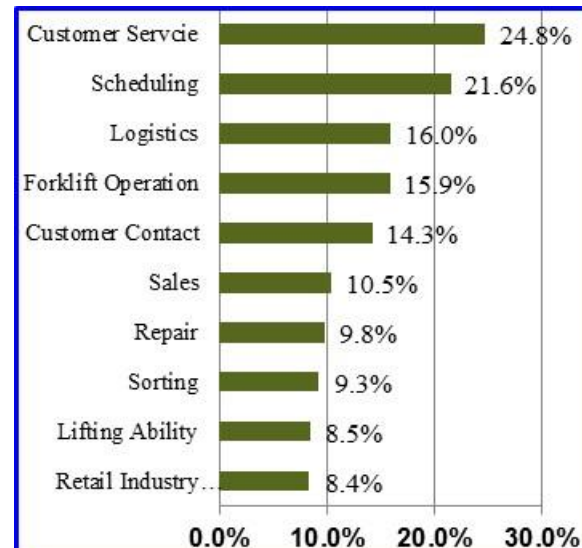
NOTE: This chart provides information on both the preferred and required education levels listed in job postings. For this reason, a job posting may be counted in more than one of the educational categories shown to the left.



N.J. TDL Employer's are also focused on workers having specific:

**Baseline
'Soft'
Skills**

**Specialized
Skills**



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Source: Labor Insight Burning Glass Technologies
Prepared by New Jersey Department of Labor & Workforce
Development, December 2021

NEW JERSEY DEPARTMENT OF LABOR & WORKFORCE DEVELOPMENT

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http://lwd.dol.state.nj.us/labor/lpa/LMI_index.html

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