

Regional Focus: Central Jersey

Data and analysis for the Middlesex-Monmouth-Ocean and Trenton labor areas

Central Region Employment Growth on Pace With State Gain

The four-county (Mercer, Middlesex, Monmouth, and Ocean) Central Region gained 9,300 jobs for a 0.9 percent increase in March 2015 compared to the same month a year earlier. Over the year regional job growth kept pace with the statewide payroll increase of 0.9 percent (+35,100 jobs). Since 2010, total employment in the Central Region increased every year over the March-to-March period, reaching 1,084,700 in March, 2015 as compared with 1,034,400 jobs in 2010.

Private sector companies in the Central Region hired 12,800 workers increasing their employment share by 1.5 percentage point during March 2015, as compared with a year earlier. Despite a challenging winter, the construction sector added 1,500 jobs. The region's manufacturing sector was up by 1,800 jobs or 3.5 percent over the year. Also adding to the jobs increase were trade, transportation and utilities (+3,400), professional and business services (+2,400), educational and health services (+4,100), and other services (+1,000). Costco and Target opened in North Brunswick (Middlesex County) during the fourth quarter of 2014 and added roughly 300 jobs to area payrolls in trade, transportation and utilities (T/T/U). In Robbinsville (Mercer County), it is reported that Amazon.com is recruiting an additional 800 workers to supplement the 1,400 jobs created in T/T/U in 2014. In the public sector, the region lost 3,500 jobs over the year with job loss concentrated at the state (-1,700 jobs) and local government (-1,800 jobs) levels.

The state posted significant job gains in the T/T/U (+11,800 or +1.4%), educational and health services (+10,700 or +1.7%) and construction (+9,000 or +7.0%) supersectors. T/T/U advances were bolstered by gains in each of its component industries: transportation, warehousing and utilities (+5,100 jobs), retail trade (+4,200) and wholesale trade (+2,500). Employment in educational and health services was up due to an increase in health care and social assistance (+12,900 jobs) which offset the loss in educational services (-2,200). Employment gains in construction were mainly due to specialty trade contractors (+7,000 jobs). The biggest employment loss was in the professional business services sector (-7,300 jobs or -1.2%).

Change in Nonfarm Employment March 2013 - March 2014p (not seasonally adjusted)

	Region		State	
	Net	%	Net	%
Total Nonfarm Employment	9.3	0.9	35.1	0.9
Private Sector	12.8	1.5	29.5	0.9
Construction	1.5	4.0	9.0	7.0
Manufacturing	1.8	3.5	2.0	0.8
Trade, Trans. & Utilities	3.4	1.6	11.8	1.4
Information	0.1	0.5	-0.3	-0.4
Financial Activities	-1.4	-2.4	-1.1	-0.4
Prof. & Business Svcs.	2.4	1.4	-7.3	-1.2
Ed. & Health Svcs.	4.1	2.2	10.7	1.7
Leisure & Hospitality	-0.1	-0.1	-0.6	-0.2
Other Services	1.0	2.1	5.4	3.3
Government	-3.5	-1.8	5.6	0.9

Source: NJLWD, Current Employment Statistics

Each of the Region's Labor Areas Contribute to Job Gains

In the Middlesex-Monmouth-Ocean Labor Area, total employment increased by 5,700 or 0.7 percent during March 2015, as compared to a year earlier. While wholesale trade jumped by



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1,900 jobs or 4.2 percent, retail trade was flat over the same period. At the same time, transportation, warehousing, and utilities relinquished 700 jobs or 2.0 percent. Educational and health services posted a gain of 4,200 jobs in the labor area. This increase was powered by gains in educational services (+900), and in healthcare and social assistance (+3,300). Ambulatory health care (+1,800) and hospitals (+800) were the primary contributors to the gains in the healthcare and social assistance sub-sector. Other services added 1,000 jobs.

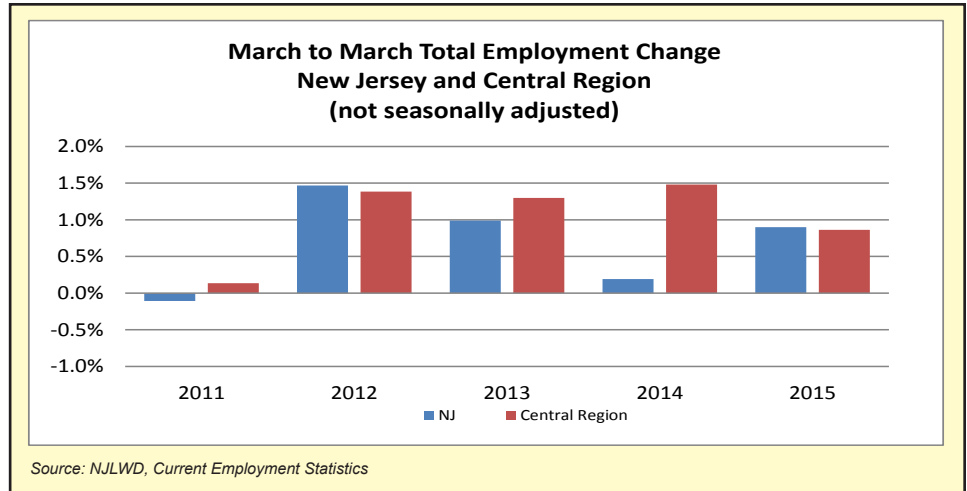
Government (-1,700), financial activities (-1,500) and information (-200) all lost jobs. While state government posted a gain of 200 jobs in the labor area, local government shed 1,900 jobs and federal government was unchanged compared with a year earlier.

The Trenton Labor Area posted a gain of 3,600 jobs, or 1.4 percent over a year earlier. Trade, transportation and utilities (+2,200) was the largest contributor to this increase. Although wholesale trade (+200) and retail trade (+200) contributed to the addition of jobs in this sector, transportation, warehousing and utilities was the engine that powered the sector with an increase of 1,800 jobs or 32.7 percent over the year. Another significant contributor to the jobs gains in the Trenton Labor Area during the period ending in March 2015 was professional and business services which posted a gain of 1,900 jobs. Gains were concentrated in the professional, scientific and technical services sub-sector which posted 1,500 new jobs. Increases in professional and business services are a good indicator that businesses in this sector are gearing up to meet the demand for services from their business clients. The manufacturing (+700) and construction (+600) sectors also experienced payroll gains.

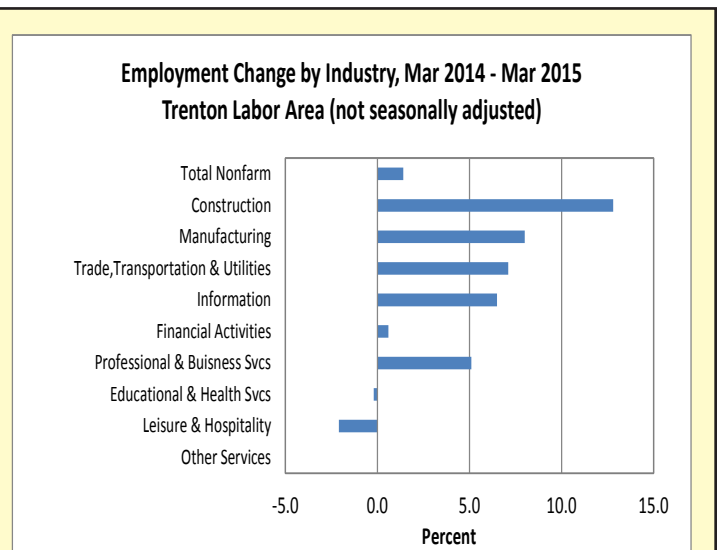
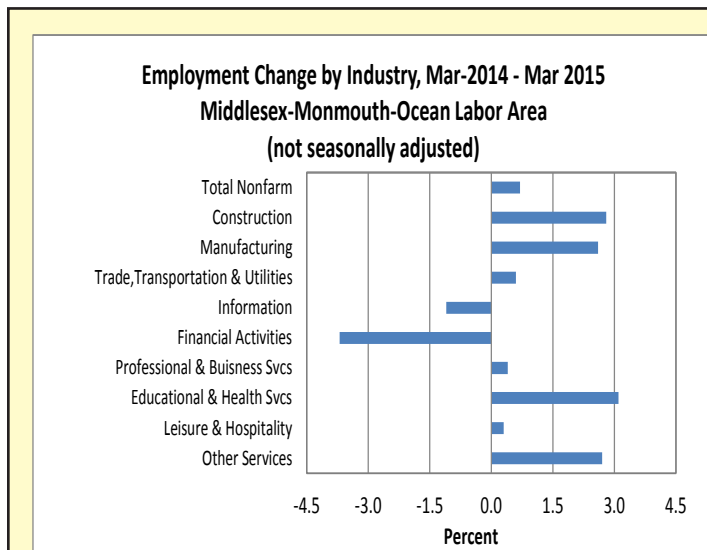
The leisure and hospitality sector lost 300 jobs during the first quarter of 2015. Educational and health services, the labor area's second largest employment sector after government, lost 100 jobs over the year ending in March 2015. The educational services subsector, which gained significant jobs over the past decade, lost 300 jobs or 1.4 percent. Although the healthcare and social assistance subsector gained 200 jobs, its hospitals component lost 100 jobs.

Total Nonfarm Employment (unadjusted March data, employment in thousands)						
	2010	2011	2012	2013	2014	2015
New Jersey	3,797.3	3,793.2	3,848.9	3,887.0	3,894.5	3,929.6
Central Region	1,030.4	1,031.8	1,046.1	1,059.7	1,075.4	1,084.7
Middlesex-Monmouth-Ocean Labor Area (Middlesex, Monmouth, and Ocean counties)	793.1	793.1	803.5	816.4	826.6	832.3
Trenton Labor Area (Mercer County)	237.3	238.7	242.6	243.3	248.8	252.4

Source: NJLWD, Current Employment Statistics



Source: NJLWD, Current Employment Statistics

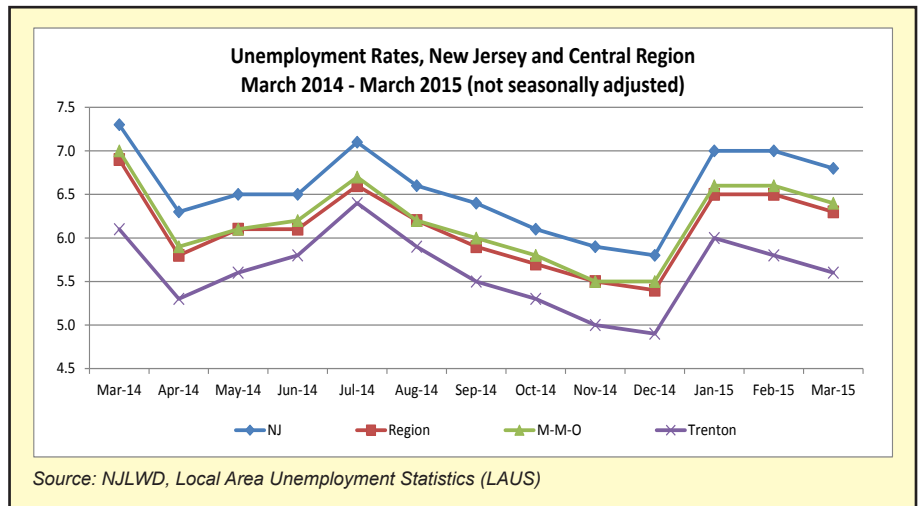


Source: NJLWD, Current Employment Statistics

More detailed data from the Current Employment Statistics (CES) program can be found at: http://lwd.dol.state.nj.us/labor/lpa/employ/ces/ces_index.html

LABOR FORCE DATA

- The state's not seasonally adjusted unemployment rate declined from 7.3 percent in March 2014 to 6.8 percent in March 2015. In the Central Region, the unemployment rate was consistently lower than the statewide rate throughout the year ending March 2015, and trended down from 7.0 percent in March 2014 to 6.4 percent in March 2015.
- The unemployment rate in the Middlesex-Monmouth-Ocean Labor Area declined from 7.0 percent in March 2014 to 6.4 percent in March 2015. Over the same period, the unemployment rate in the Trenton-Ewing Labor Area declined from 6.1 percent in March 2014 to 5.6 percent in March 2015.

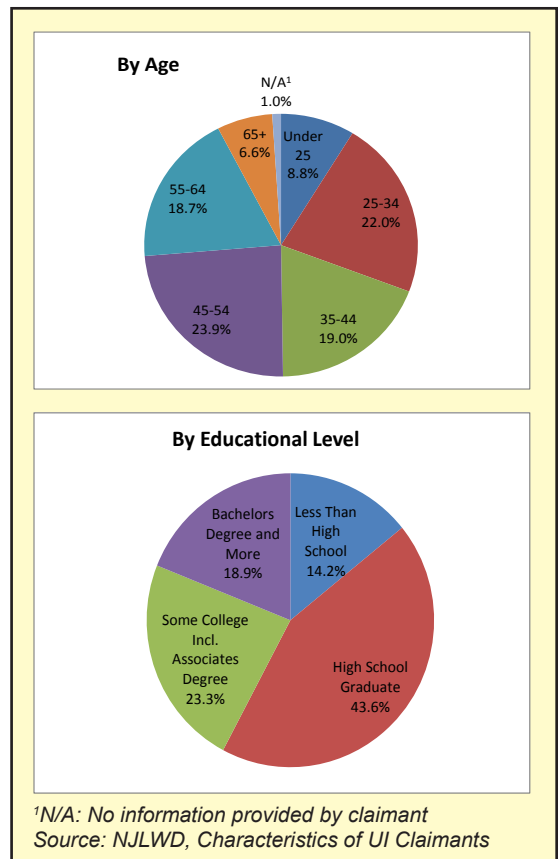


More detailed data from the Local Area Unemployment Statistics (LAUS) program can be found at: http://lwd.dol.state.nj.us/labor/lpa/employ/uirate/lfest_index.html

CHARACTERISTICS OF NEW JERSEY'S INSURED UNEMPLOYED CENTRAL REGION, FIRST QUARTER 2015

CLAIMANTS BY OCCUPATIONAL GROUP		
	Number	Percent
Management	4,707	8.0
Business and financial	1,942	3.3
Professional and related	7,191	12.1
Services	10,789	18.2
Sales and related	4,207	7.1
Office and administrative support	7,274	12.3
Farming, fishing and forestry	213	0.4
Construction and extraction	8,000	13.5
Installation, maintenance and repair	2,395	4.0
Production	4,321	7.3
Transportation and material moving	7,928	13.4
Military	204	0.3

- During the first quarter of 2015 there were 53,695 residents of New Jersey's Central Region claiming unemployment compensation benefits. Central Region residents represented 24.9 percent of claimants statewide.
- The largest percentage (18.5%) of workers who claimed unemployment benefits in the Central Region during the first quarter of 2015 were previously employed in services occupations. This was followed by construction and extraction occupations (13.9) and transportation and material moving occupations (13.7).



REGIONAL POPULATION ESTIMATES

Intercensal Population Estimates for New Jersey and the Central Region: 2010 to 2014

	Population		Change	
	2010	2014	Number	Percent
New Jersey	8,791,894	8,938,175	146,281	1.7%
Central Region	2,383,318	2,423,414	40,096	1.7%
Mercer County	366,513	371,537	5,024	1.4%
Middlesex County	809,858	836,297	26,439	3.3%
Monmouth County	630,380	629,279	-1,101	-0.2%
Ocean County	576,567	586,301	9,734	1.7%

Source: U.S. Census Bureau, Population Division

- Three of the four counties in the Central Region of New Jersey are estimated to have gained population in 2014 as compared to the Census count in 2010. Middlesex County is estimated to have added 26,439 residents from 2010 to 2014, the largest population gain among the region's counties. The county saw an estimated increase from births (+42,237) and net international migration (+31,598) over deaths (-24,368) and net domestic migration (-22,578).
- Overall, the Central Region (Mercer, Middlesex, Monmouth, and Ocean counties) is estimated to have gained residents at the same rate (+1.7%) as the state.
- Monmouth County is the only county in the region estimated to have lost residents (-1,101). While Monmouth County gained population from births (+26,547) and net international migration (+5,379 persons), it lost residents due to deaths (-22,825) and net domestic migration (-9,938).

SPECIAL NOTE REGARDING LABOR MARKET AREA DEFINITIONS

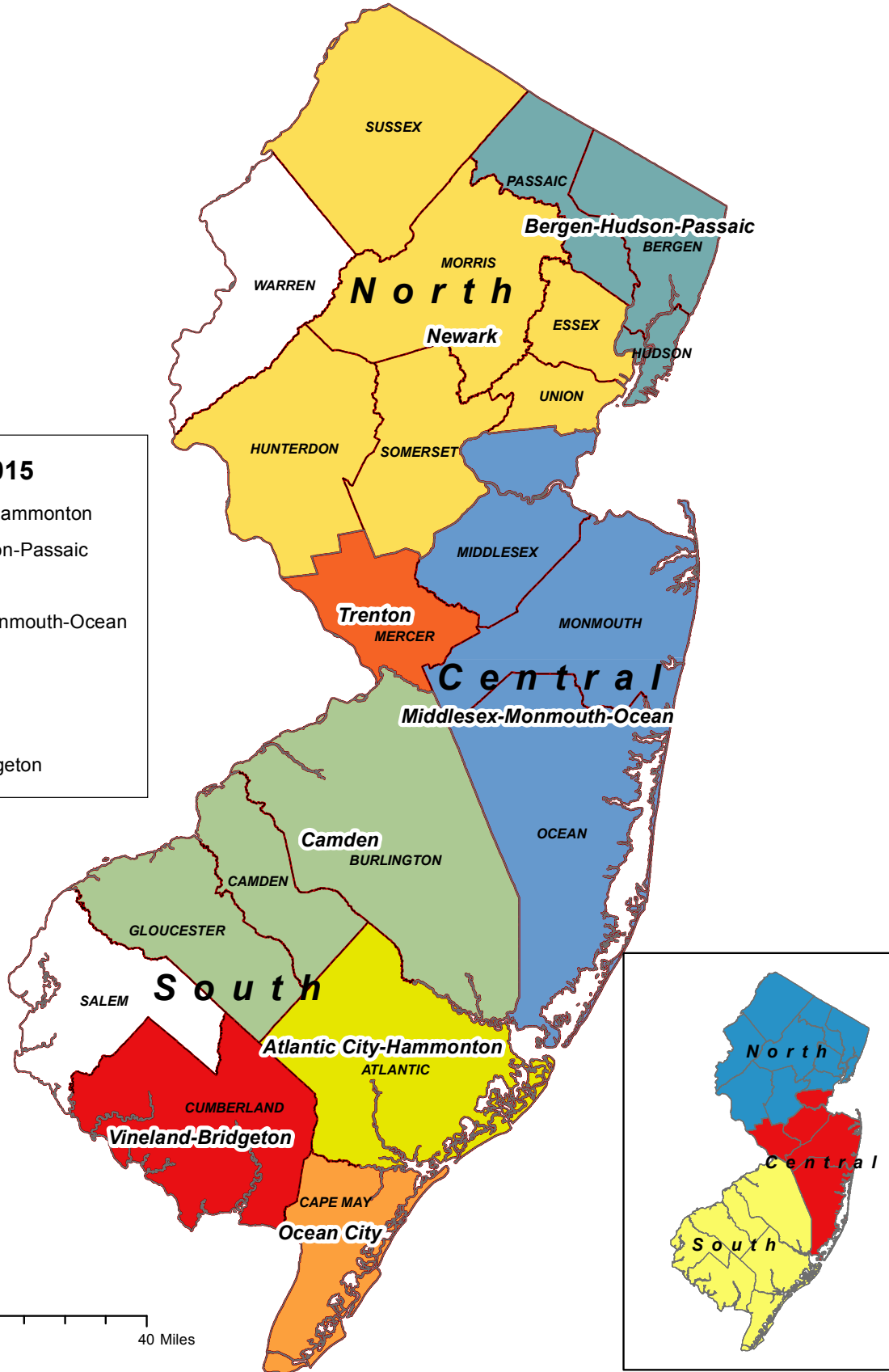
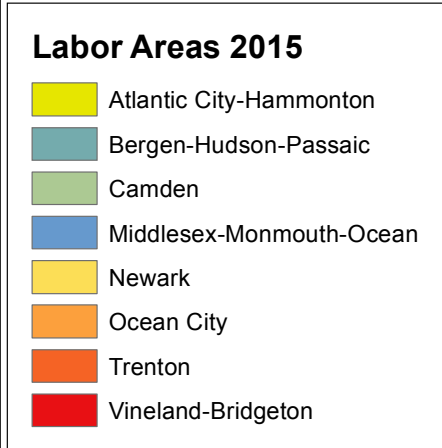
Starting with the publication of January 2015 data on March 17th, New Jersey's Department of Labor and Workforce Development will release nonfarm employment estimates and labor force statistics based on new labor market area definitions.

Every 10 years, the U.S. Office of Management and Budget (OMB) re-defines federal statistical areas which includes metropolitan statistical areas (MSAs) based on the application of updated 2010 statistical standards to the U.S. Census Bureau's 2010 Census population and American Community Survey journey-to-work data. As a result, the geographic configurations for some of New Jersey's labor areas will change. Monthly nonfarm wage and salary estimates, labor force estimates and other economic series will be generated based on these new geographic configurations. In addition, historical data series for these new areas have been reconstructed back to 1990. The following table shows a comparison of the previous and new Labor Area designations.

Consequently, the regions for which the Northern and Central Regional Focus is written will also change. The Northern Region will now include Somerset County formerly in the Central Region. All other county regional assignments will remain the same. See the map for the new regional county alignments.

2000 Census-based Labor Areas	Counties Covered	New 2010 Census-based Labor Areas	Counties Covered
Atlantic City-Hammonton Labor Area	Atlantic County	Atlantic City-Hammonton Labor Area	Atlantic County
Bergen-Hudson-Passaic Labor Area	Bergen, Hudson, & Passaic counties	Bergen-Hudson-Passaic Labor Area	Bergen, Hudson, & Passaic counties
Camden Labor Area	Burlington, Camden & Gloucester counties	Camden Labor Area	Burlington, Camden & Gloucester counties
Edison Labor Area*	Middlesex, Monmouth, Ocean & Somerset counties	Middlesex-Monmouth-Ocean Labor Area	Middlesex, Monmouth, & Ocean counties
Newark-Union Labor Area*	Essex, Hunterdon, Morris, Sussex, Union, & Pike (PA) counties	Newark Labor Area	Essex, Hunterdon, Morris, Somerset , Sussex, Union, & Pike (PA) counties
Ocean City Labor Area	Cape May County	Ocean City Labor Area	Cape May County
Trenton-Ewing Labor Area	Mercer County	Trenton Labor Area	Mercer County
Vineland-Millville-Bridgeton Labor Area	Cumberland County	Vineland-Bridgeton Labor Area	Cumberland County

Labor Areas 2015



Note: Warren County is part of the Allentown-Bethlehem-Easton MSA (Labor Area), & Salem County is part of the Wilmington, Metropolitan Division (Labor Area).
 Source: NJLWD, Office of Research & Information, Division of Economic & Demographic Research
 Prepared by: Division of Workforce Research & Analytics, Bureau of Labor Market Information, March 2015

REGIONAL JOB OUTLOOK JANUARY 2015 - MARCH 2015

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

JOB LISTINGS BY COUNTY

County	Listings
Middlesex	25,719
Mercer	18,209
Monmouth	12,822
Ocean	7,241

INDUSTRIES WITH THE MOST JOB LISTINGS

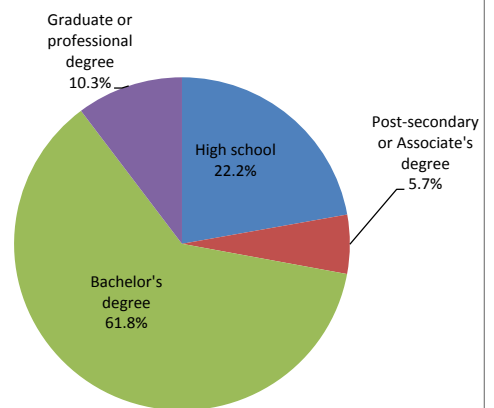
Industry	Listings
Hospitals	4,612
Professional, Scientific, and Technical Services	4,203
Educational Services	3,088
Food Services and Drinking Places	2,219
Ambulatory Health Care Services	2,135
Publishing Industries (except Internet)	2,106
Insurance Carriers and Related Activities	1,765
Credit Intermediation and Related Activities	1,547
Food and Beverage Stores	1,314
Chemical Manufacturing	1,247
Administrative and Support Services	1,102
General Merchandise Stores	1,013

OCCUPATIONS WITH THE MOST LISTINGS

Occupation	Listings
Software Developers, Applications	2,684
Sales Reps, Wholesale and Manufacturing, Except Technical and Scientific Products	2,262
Retail Salespersons	2,061
Registered Nurses	1,920
Customer Service Representatives	1,405
First-Line Supervisors of Retail Sales Workers	1,256
Managers, All Other	1,206
Medical and Health Services Managers	996
Computer Systems Analysts	965
Tutors	939
Heavy and Tractor-Trailer Truck Drivers	927
Human Resources Specialists	880

- During the first quarter of 2015, Central Region employers in the hospitals, professional, scientific and technical services, educational services, food services and drinking places, and ambulatory health care services exhibited the most labor demand based on online job postings.
- Concentrated in Middlesex and Mercer counties, employers indicated that they were most interested in filling positions for software applications developers, sales representatives, retail salespersons, registered nurses, and customer service representatives. Skills that were actively sought included sales, accounting, mathematics, cleaning, store management, and technology-related Oracle, SQL and JAVA.
- Of the regional job listings for which educational requirements were provided, the vast majority required a bachelor's degree or higher.

Job Listings by Educational Requirement



EMPLOYERS WITH SIGNIFICANT ONLINE JOB LISTING ACTIVITY

Employer
Oracle
Meridian Health System
ShopRite / Wakefern
Wyzant
Rutgers, the State University of New Jersey
Barnabas Health
Saint Barnabas Health Care System
Princeton Healthcare System
Bristol-Myers Squibb
Burger King

TOP SKILLS IN DEMAND

Skill	Listings
Sales	4,362
Oracle	3,257
Accounting	2,964
Mathematics	2,692
Cleaning	2,429
Store Management	2,403
SQL	2,334
Scheduling	2,321
JAVA	2,162
Repair	2,091
Business Development	2,049
Collaboration	1,936

Source: Burning Glass Technologies, Labor Insight

Prepared by: New Jersey Department of Labor and Workforce Development, Bureau of Labor Market Information

Central Region Developments

Mercer County

Amazon.com continues to have a positive economic impact on Mercer County. The company recently announced that it plans to employ an additional 800 workers who will join the roughly 1,400 hired at its Robbinsville Township fulfillment center during 2014. The company has proven to be a significant job creator for both the township of Robbinsville and Mercer County. Many of the workers are from neighboring communities including Trenton. Many residents from the city of Trenton are able to reach the suburban work location via the Z-line, a free bus shuttle that transports employees between the Hamilton Marketplace and the Matrix Business Park where Amazon.com is located.

In East Windsor Township, Japanese cosmetics company Shiseido continues to expand its North American headquarters with the addition of research and development, office, and warehouse space. The expansion is still in the planning stages and construction is expected to begin in 2015. The location conducts research and development, production, warehousing, and distribution for Shi-

seido's NARS and Bare Escentuals brands. The company plans to add to its current workforce of approximately 300 full and part-time employees. In addition, Shiseido-owned Davlyn Industries, a supplier and manufacturer of textile-based products located in Monroe Township (Middlesex County), will move its operations and approximately 160 employees to East Windsor as part of the expansion project.

In Lawrence Township along Route 1 three new business establishments have been either completed or are under development. AAA Lawrenceville Car Care Insurance Travel Center and a new Wawa convenience store and gas station have opened, while site work for a new McDonalds restaurant continues on the former Mrs. G's appliance store site.

In Hamilton Township an addition to a shopping center at the corner of Route 33 East and Quaker Bridge Road is complete and the new space is awaiting tenants. Down the road along Nottingham Way, there are signs that the primarily vacant Suburban Shopping Center is poised for new life. Recently, plans have been announced for construction of a Walmart which would replace all of the closed stores at the center. Once the home of Bradlees,

Payless, Drug Emporium, and other stores, only a Burger King restaurant remains open in the center today. Meanwhile, Global Essence, a marketer of flavorings, beauty supplies and household products signed a lease for 63,500-sq.ft. of space to be used for its new corporate and operational headquarters in the Hamilton Business Center.

Construction of Princeton's new train station has been completed. However work continues on the arts center, retail stores and the renovation of Alexander Road to handle the expected increase in traffic. In West Windsor Township, land is being cleared on the western portion of Carnegie Center, between Route 1 South and Canal Pointe Blvd for the construction of new restaurants.

Princeton University Press has closed its jointly owned (University of California) California Princeton Fulfillment Services in Ewing Township resulting in the loss of approximately 35 jobs. For 20 years the company had distributed publications for both Princeton University and University of California publications. The industry continues to move to digital publishing which contributed to the downsizing; Princeton University Press is outsourcing printing needs to a company in Tennessee.

Monmouth County

According to published reports, fashion retailer Primark, with more than 250 stores in the UK, Ireland and Europe, has entered into a lease agreement with Sears Holdings Corporation to sublet space in seven stores in the northeastern United States. In New Jersey, the plan is to lease the second floor of the Freehold Raceway mall location with Sears maintaining the first floor. Renovations at the store are now underway.

In Red Bank well-known musician and restaurateur Tim McLoone opened the latest of the McLoone Corporation's 10 restaurants in New Jersey, The Robinson Ale House. Nearly three years after Superstorm Sandy the company is still rebuilding the

McLoone's Rum Runner in Sea Bright.

Middlesex County

New Jersey's pharmaceutical industry will be impacted by an out-of-state move this summer. Biotech manufacturer GE Healthcare Life Sciences is consolidating operations and moving its headquarters from New Jersey to Marlborough, Massachusetts. The company is closing locations in Princeton (Mercer County) and Piscataway while keeping the Livingston (Essex County) and South Plainfield locations open; approximately half of its roughly 400 New Jersey employees will be impacted. Some will be offered an opportunity to re-locate or work from home while others would be laid off.

Schwan Cosmetics, USA, will cease operations in Piscataway and consolidate to a facility located in Murfreesboro, Tennessee. The move should be completed by the end of September 2015. Twenty eight employees will relocate to Tennessee while 85 will be idled.

In Plainsboro, the Children's Hospital of Philadelphia has opened a \$19.8 million specialty care center on the campus of the University Medical Center of Princeton at Plainsboro. The center will employ between 15 and 20 workers and 30 doctors to serve patients needing care for allergies, immunology, cardiology, gastroenterology, nephrology, neurology, ophthalmology, orthopedics and urology.

Ocean County

In Jackson Township, Six Flags Great Adventure plans to hire 4,000 employees, including 150 interns, for its 2015 season. In Seaside Heights, Casino Pier on the boardwalk is in its final stages of recovery from Hurricane Sandy damages. It is expected to be ready for customers this summer. Realtors are reporting that demand for shore rentals is strong for the 2015 season. Prices are being pushed higher as the peak weeks sell out.

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