



Economic Base Study San Juan County, New Mexico

December 2024



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Suggested citation:

Winingham, Kramer, Hayford Danso, and Abdul Khaliq. *Economic Base Study: San Juan County*, 2024. New Mexico State University, 2024.

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Executive Summary

Since 2012, Arrowhead Center at New Mexico State University (NMSU) has sponsored the preparation of economic base studies for each New Mexico county, the Albuquerque Metropolitan Statistical Area (MSA), and the entire state of New Mexico. Base studies are released as a public service to help businesses, economic developers, policymakers, government officials, and the general public better understand key industries that contribute to the economic base of their local economies.

This report is one of 35 economic base studies prepared by Arrowhead Center. Of the 35 reports, 33 describe the economic bases of New Mexico's counties. There are separate reports for the State of New Mexico and the Albuquerque MSA. New Mexico has three additional MSAs (Las Cruces, Santa Fe, and Farmington), all single-county MSAs; separate reports have not been prepared. All 35 reports can be found at arrowheadcenter.org/economic-and-policy-studies/.

The reports were prepared under the direction of Kramer Winingham and were based on prior reports overseen by James Peach. Hayford Danso and Abdul Khaliq, graduate students in NMSU's Doctor of Economic Development (DED) program, did much of the work on the updates. Comments and suggestions are welcomed and can be sent to jkramer@nmsu.edu.

In brief, the data and analysis suggest that for 2023, the following industries should be considered base industries in San Juan County:

- ★ Mining, quarrying, and oil and gas: 4,394 jobs
- ★ Utilities: 996 jobs
- ★ Construction: 3,695 jobs
- ★ Retail trade: 5,883 jobs
- ★ Accommodation and food services: 4,711 jobs
- ★ Health care and social assistance: 8,022 jobs

Based on this analysis, the export base multiplier for San Juan County in 2023 was found to be 1.65 (45,758/27,701). This ratio suggests that the addition of one (1) base industry job in San Juan County would increase total jobs in the community by 1.65. The export base multiplier of 1.65 calculated above reinforces the importance of base (exporting) industries to the economy of San Juan County.

Methodology

An economic base study is a descriptive tool used to analyze the composition of local economic activity and identify regional competitive advantages. Economic base studies are often conducted to help guide local economic development activities and help economic development officials make data-driven decisions about what type of firms they should attempt to attract to local areas. Economic base studies can also help local and regional businesses better understand the local and export product markets.

The specific purposes of economic base studies include:

- Understanding regional economic growth and competitive advantages
- Making short and long-term forecasts
- Identifying potential growth sectors
- Identifying potential problem areas

According to economic base theory, any local economy may be divided into base and non-base industries. The economic base theory also suggests that economic growth depends on sectors that export goods and services from the region (base industries) rather than businesses whose goods and services remain local (non-base industries). Base industries promote local economic growth by bringing jobs and income to the local economy. Non-base industries serve local residents and support base industries.

An industry classified as a base in one region may be identified as a non-base in another. A standard way to identify local base activity is to use location quotients (LQs). LQs are calculated as a single industry's percentage of total local employment divided by the industry's total state or national employment percentage. For example, the LQ for a single New Mexico industry (*industry*) be calculated as follows:

$$LQ = \frac{(\text{Employment in } \textit{industry} \text{ in NM} / \text{total employment in NM})}{(\text{Employment in } \textit{industry} \text{ in the US} / \text{total employment in the US})}$$

The LQ illustrates the relative importance of the level of local employment in that sector concerning the benchmark economy, for example, state, regional, or national. An LQ greater than 1.0 indicates that a particular industry employs proportionately more workers locally than it does in the benchmark economy, which indicates a competitive advantage for a specific industry in the region. Conversely, an LQ of less than 1.0 indicates that the

industry of note employs fewer workers locally than the national average.¹ Industries with LQs greater than 1 may have greater growth potential than other industries because their competitive advantage allows them to compete in broader markets than non-base industries, serving only local customers. Industries with LQs less than 1 can be interpreted as economic leakages in that local customers purchase goods and services from businesses located outside the region. This can indicate an opportunity to reduce economic leakages by growing non-base industries; however, it also signals that customers are seeking goods and services from these industries in other regions due to a lack of availability or competitiveness at the local level.

This report calculates LQs for industries within San Juan County using national employment as the basis for comparison, shown in Tables 8-13. For this report, base industries are identified utilizing general knowledge about the structure of the local economy combined with LQs greater than 1.0. LQs and other data points are included for the most recent year for which data are available and the four years preceding, which for most data points is 2019-2023. Industry classifications are presented for various levels of detail using the North American Industry Classification System (NAICS), the standard used by U.S. government statistical agencies to classify business establishments for collecting, analyzing, and publishing statistical data related to the U.S. business economy.²

The data points used in this report were gathered from the Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW)³, Bureau of Economic Analysis (BEA) Personal Income by County⁴, and U.S. Census Bureau⁵ American Community Survey and Census Bureau Profiles.

¹ For additional information on LQs, see:

arrowheadcenter.org/wp-content/uploads/2015/06/WhatIsaLocationQuotient.pdf

² (U.S. Census, 2023)

³ (Bureau of Labor Statistics, 2024)

⁴ (Bureau of Economic Analysis, 2024)

⁵ (U.S. Census, 2023)

Overview

San Juan County is located in the northwestern corner of New Mexico and encompasses 5,538 square miles, or 2.4% of the land area in the state of New Mexico, and borders Arizona, Utah, and Colorado in an area known as Four Corners.⁶ The population of San Juan County in 2022 was 120,418, or 5.7% of the state total, and the fifth largest county in New Mexico by total area.⁷ The City of Aztec, with a population of 24,384, contained 20.24% of San Juan County's population in 2022.⁸

Table 1. Population, San Juan County, and selected comparisons, 2018-2022⁹

Year	2018	2019	2020	2021	2022	Δ	%Δ
City of Aztec	26,537	26,453	23,676	25,021	24,384	-2,153	-8%
San Juan County	125,043	123,958	121,661	120,993	120,418	-4,625	-4%
New Mexico	2,092,434	2,092,454	2,097,021	2,109,366	2,112,463	+20,029	+1%
United States	322,903,030	324,697,795	326,569,308	329,725,481	331,097,593	+8,194,563	+3%

San Juan County's population has decreased by 4% from 125,043 in 2018 to 120,418 in 2022, as shown in Table 1. Comparatively, New Mexico's population increased by 1% for the same period, and the population of the United States increased by 3%.

San Juan County's employment is slightly more concentrated in goods-producing industries (27%) and wage and salary employment than in the state and national economy, as shown in Tables 2 & 4. Table 3 shows employment levels by types: wage and salary and proprietor employment, nonfarm proprietor employment has grown significantly in San Juan County 2018-2022, increasing by 12%. The remainder of this analysis focuses only on wage and salary employment.

In 2023, 67% of all workers in San Juan County were employed in the private sector, lower than state levels of private employment (79%) and significantly lower than national private

⁶ (U.S. Census, 2024)

⁷ (U.S. Census, 2023)

⁸ (U.S. Census, 2023)

⁹ (U.S. Census, 2023)

employment levels (86%). San Juan County's employment by employer type is shown in Table 5 with state and national figures comparisons.

Table 2. Employment by Domain, San Juan County and selected comparisons, 2023¹⁰

Employment Type	San Juan County	New Mexico	United States
101 Goods-producing	27%	17%	17%
102 Service-providing	73%	83%	83%
Total	100%	100%	100%

Table 3. Employment Types, San Juan County, 2018-2022¹¹

Employment Type	2018	2019	2020	2021	2022	Δ	%Δ
Wage and salary employment	50,343	49,680	44,859	44,797	46,959	-3,384	-7%
Proprietors' employment	10,924	10,597	10,945	11,339	11,890	+966	+9%
Farm proprietors' employment	2,329	2,330	2,295	2,291	2,234	-95	-4%
Nonfarm proprietors' employment	8,595	8,267	8,650	9,048	9,656	+1,061	+12%

Table 4. Employment Type Percentages, San Juan County, and selected comparisons, 2022¹²

Employment Type	San Juan County	New Mexico	United States
Wage and salary employment	80%	77%	74%
Proprietors' employment	20%	23%	26%
Farm proprietors' employment	4%	2%	1%
Nonfarm proprietors' employment	16%	21%	25%

¹⁰ (Bureau of Labor Statistics, 2024)

¹¹ (Bureau of Economic Analysis, 2024)

¹² (Bureau of Economic Analysis, 2024)

Table 5. Employer Types, San Juan County and selected comparisons, 2023¹³

Employer Type	San Juan County		New Mexico		United States	
	Employment	%	Employment	%	Employment	%
Private	34,746	67%	678,095	79%	131,240,997	86%
Local Government	8,992	20%	99,594	12%	14,259,427	9%
State Government	468	4%	48,056	6%	4,657,178	3%
Federal Government	1,552	9%	29,867	3%	2,929,928	2%
Total	45,758	100%	855,612	100%	153,087,530	100%

Per capita annual wages for San Juan County in 2023 (\$54,241) was 93% of the state of New Mexico average (\$58,110) and 75% of the national average (\$72,357), shown in Figure 1¹⁴. The growth rate of per capita annual wages in San Juan County between 2019 and 2023 (17%) was slower than the growth in annual wages for New Mexico (24%) and the growth rate of the national averages (22%) during the same period.

The total number of wage and salary jobs in San Juan County in 2023 was 45,758. Between 2019 and 2023, total employment in San Juan County decreased by 2%, compared to the state, which saw an increase of 2%, and the nation, which increased by 3%, as shown in Table 6.

Table 6. Employment Growth, San Juan County, and selected Locations, 2019-2023¹⁵

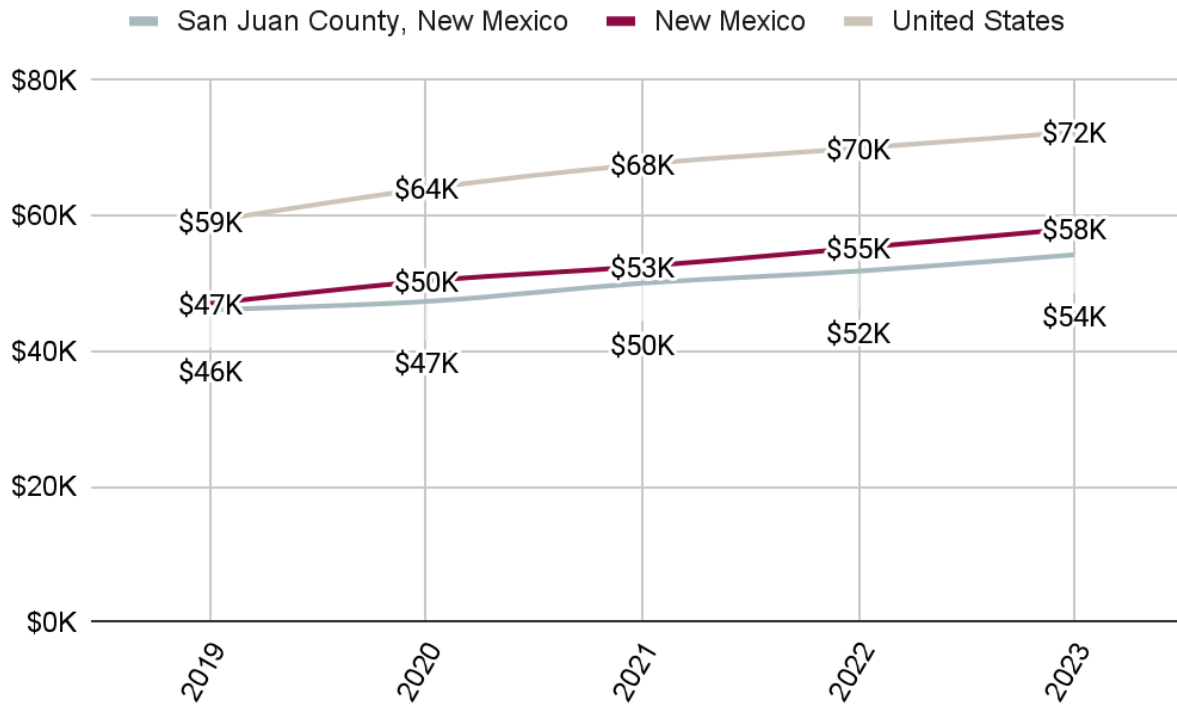
Area Title	2019	2020	2021	2022	2023	Δ	%Δ
San Juan County	46,665	42,128	42,036	44,270	45,758	-907	-2%
New Mexico	836,674	781,772	796,020	832,863	855,612	+18,938	+2%
United States	148,105,093	139,103,774	143,759,144	150,025,655	153,087,530	+4,982,437	+3%

¹³ (Bureau of Labor Statistics, 2024)

¹⁴ (Bureau of Labor Statistics, 2024)

¹⁵ (Bureau of Labor Statistics, 2024) and authors' calculations

Figure 1. Per Capita Personal Income, San Juan County and selected comparisons, 2019-2023¹⁶



¹⁶ (Bureau of Labor Statistics, 2024) and authors' calculations

Economic Base Analysis

For this report, an LQ greater than 1.0 with respect to U.S. employment is considered a base industry. The sectors with LQ greater than 1.0 have been shaded green. All LQ calculations are compared to national employment data. All tables after Table 7 focus only on private wage and salary employment.

Table 7 shows LQ calculation by employer type, highlighting government activities' importance to San Juan County's economy. San Juan County heavily relies on government employment particularly, local government and Federal government. The large LQ for Federal government and local government employment (1.70 and 2.18 in 2023 respectively) reflects a low population, and high level of employment at the federal government facilities in the county. As important national facilities, these Federal activities export services beyond San Juan County and can be classified as a base industry in the county. The LQ for private employment (0.88 in 2023) in San Juan County reflects a lower level of private employment compared to the national average. Local Government, even though has a location quotient of 2.18 respectively, collects taxes from residents to provide services to the community, including employment, and therefore cannot be considered as the base-industry. Following this practice, Local government for San Juan County will be regarded as a non-base industry even though it had an LQ of 2.18 in 2023. Federal government jobs could be classified as base industries for San Juan Counties since wages and other benefits of these workers are not paid from the local taxes.

Table 7. Location Quotients by Employer Type, San Juan County, 2019-2023¹⁷

Employer Type	2019	2020	2021	2022	2023
Private	0.91	0.90	0.90	0.89	0.88
Local Government	1.85	1.90	2.07	2.14	2.18
State Government	0.31	0.35	0.35	0.34	0.34
Federal Government	1.59	1.87	1.85	1.75	1.70

San Juan County's private sector wage and salary employment are shown in Table 8 by NAICS Sector from 2019 to 2023. Mining, quarrying, oil and gas extraction; Utilities; manufacturing; construction; retail trade; accommodation and food services; and health care, and social assistance stand out as base industries for San Juan County, with 2023 LQs of 25.18, 2.35, 1.43, 1.27, 1.13, and 1.07 respectively. The strength of San Juan

¹⁷ (Bureau of Labor Statistics, 2024)

County's Mining, quarrying, and oil and gas extraction is due to the high levels of coal, and oil and gas in the county. Companies such as San Juan Coal Inc., Navajo Mines A3, BHP Minerals, Mining Equipments Inc., ConocoPhillips, Chevron, and BP., etc employ significant amounts of workers in the county. These companies are engaged in exploration, drilling, extraction, and refining of oil and natural gas resources. From the retail side of oil and gas, Chevron, Shell, Conoco, Exxon, and Valero gas stations have contributed to the industry's growth in the county. This sector contributes significantly to the local economy through employment and revenue generation. The strength of the utilities sector can be explained based on the Navajo Transitional Energy Company, APS Four Power Plant, and San Juan County Electric Cooperative, serving residential and commercial customers with electricity. People are employed in activities such as generation, transmission, and distribution of electric power to homes, businesses, and industries. Utilities also encompass water supply services provided by entities like the San Juan Water Commission. Residential, commercial, and industrial construction projects including housing developments, office buildings, pipelines, and infrastructure improvements have been the main activities in the construction industry. Construction firms such as Merrion Oil & Gas, a company involved in building and maintaining infrastructure for the oil and gas industry. Retail chains and stores such as Walmart, and Home Depot, and local businesses attract customers from outside the county. Accommodation and Food Service, Hotels and restaurants such as Courtyard by Marriott Farmington, offering accommodations and dining options for tourists and business travelers, lodging, food, and beverage services to visitors and residents, supporting tourism and hospitality industries in San Juan County. Health care and social assistance as a base industry indicate that health care and social service providers serve patients in neighboring communities and export services beyond San Juan County. San Juan Regional Medical Center provides comprehensive healthcare services including hospital care, outpatient clinics, and specialized medical treatments.

Table 8. Location Quotients By NAICS Sector, San Juan County, 2019-2023¹⁸

Industry Title	2019	2020	2021	2022	2023
NAICS 21 Mining, quarrying, and oil and gas extraction	21.61	23.13	24.76	25.64	25.18
NAICS 22 Utilities	4.21	4.3	4.23	3.28	2.35
NAICS 23 Construction	1.57	1.36	1.2	1.32	1.43
NAICS 44-45 Retail trade	1.09	1.16	1.26	1.27	1.27
NAICS 72 Accommodation and food services	1.02	1.14	1.17	1.17	1.13
NAICS 62 Health care and social assistance	1.02	1.08	1.11	1.09	1.07
NAICS 81 Other services (except public administration)	0.87	0.93	0.94	0.89	0.85
NAICS 42 Wholesale trade	0.91	0.9	0.87	0.84	0.83
NAICS 71 Arts, entertainment, and recreation	0.66	0.45	0.61	0.63	0.61
NAICS 11 Agriculture, forestry, fishing and hunting	0.73	0.61	0.61	0.59	0.55
NAICS 48-49 Transportation and warehousing	0.63	0.54	0.52	0.52	0.53
NAICS 53 Real estate and rental and leasing	0.54	0.54	0.51	0.48	0.52
NAICS 52 Finance and insurance	0.41	0.41	0.42	0.4	0.38
NAICS 56 Administrative and support and waste management and remediation services	0.38	0.38	0.36	0.37	0.37
NAICS 61 Educational services	0.39	0.38	0.36	0.33	0.32
NAICS 31-33 Manufacturing	0.32	0.27	0.27	0.33	0.32
NAICS 54 Professional, scientific, and technical services	0.35	0.32	0.29	0.26	0.28
NAICS 51 Information	0.24	0.21	0.2	0.21	0.18
NAICS 55 Management of companies and enterprises	0.32	0.36	0.2	0.16	0.17

In brief, the data and analysis suggest that for 2023, the following industries should be considered as base industries in San Juan County based on Table 15:

- ★ Mining, quarrying, and oil and gas: 4,394 jobs
- ★ Utilities: 996 jobs
- ★ Construction: 3,695 jobs
- ★ Retail trade: 5,883 jobs
- ★ Accommodation and food services: 4,711 jobs
- ★ Health care and social assistance: 8,022 jobs

In economic base studies, it is common to calculate an export-based employment multiplier. This employment multiplier is obtained by dividing total employment in San Juan County by total employment in the base industries. In San Juan County, the multiplier for

¹⁸ (Bureau of Labor Statistics, 2024)

2023 is equal to 1.65 (45,758/27,701). This ratio suggests that the addition of one (1) base industry job in San Juan County would increase total jobs in the community by 1.65. The export base multiplier of 1.65 calculated above reinforces the importance of base (exporting) industries to the economy of San Juan County. This employment multiplier is not to be compared to employment multipliers included in economic impact analysis tools, including RIMS, REMI, and IMPLAN. In the case of San Juan County, potential double-counting occupations may result in an upward bias of the multiplier, given that farm employees often have more than one occupation.

Local economic development policy actions, such as creating industrial parks, tax abatement, and financing, and workforce development projects, are often used by local communities to expand an area's economic base. A community economic development plan should include the appropriate combination of policies usually resulting from public and private sector interaction.

More detailed industry data is provided in the appendix for further analysis and interpretation.

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Appendix

Tables 9-12 show LQs at greater levels of detail to indicate which employer types and sub-industries are responsible for the strength of the county's base industries. Tables 13-22 show employment levels, growth rates, and composition percentages by industry for San Juan County, New Mexico, and the United States for comparison.

Table 9. Top 15 Location Quotients By NAICS 3-digit Sector, San Juan County, 2019-2023¹⁹

Industry Title	2019	2020	2021	2022	2023
NAICS 213 Support activities for mining	25.4	28.3	31.3	32.7	33.5
NAICS 211 Oil and gas extraction	26.0	28.2	30.8	31.8	32.1
NAICS 212 Mining (except oil and gas)	11.7	12.5	12.5	11.6	8.5
NAICS 237 Heavy and civil engineering construction	4.6	3.6	3.0	3.1	3.4
NAICS 221 Utilities	4.2	4.3	4.2	3.3	2.4
NAICS 457 Gasoline stations and fuel dealers				2.1	2.1
NAICS 333 Machinery manufacturing	1.9	1.4	1.5	2.1	2.0
NAICS 486 Pipeline transportation	2.1	1.2	1.3	1.7	1.9
NAICS 441 Motor vehicle and parts dealers	1.7	1.7	1.8	1.8	1.8
NAICS 811 Repair and maintenance	1.8	1.8	1.9	1.8	1.7
NAICS 562 Waste management and remediation services	2.0	1.9	1.9	1.8	1.7
NAICS 455 General merchandise retailers				1.7	1.6
NAICS 484 Truck transportation	1.8	1.6	1.4	1.5	1.6
NAICS 236 Construction of buildings	1.5	1.2		1.0	1.3
NAICS 624 Social assistance	1.2	1.3	1.5	1.5	1.3

¹⁹ (Bureau of Labor Statistics, 2024)

Table 10. Top 25 Location Quotients By NAICS 4-digit Sector, San Juan County, 2019-2023²⁰

Industry Title	2019	2020	2021	2022	2023
NAICS 2131 Support activities for mining	25.4	28.3	31.3	32.7	33.5
NAICS 2111 Oil and gas extraction	26.0	28.2	30.8	31.8	32.1
NAICS 2371 Utility system construction	8.6	6.8	5.7	5.8	6.3
NAICS 4247 Petroleum and petroleum products merchant wholesalers	5.4	5.9	5.5	6.2	5.9
NAICS 8113 Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	4.9	4.8	4.9	4.6	4.2
NAICS 4246 Chemical and allied products merchant wholesalers	2.9	3.5	3.2	3.2	3.4
NAICS 5629 Remediation and other waste management services	3.8	3.6	3.7	3.6	3.4
NAICS 4842 Specialized freight trucking	3.4	3.4	3.0	3.2	3.2
NAICS 2213 Water, sewage and other systems	3.4	3.2	3.2		2.6
NAICS 4571 Gasoline stations				2.2	2.2
NAICS 4238 Machinery, equipment, and supplies merchant wholesalers	2.7	2.6	2.5	2.3	2.2
NAICS 2362 Nonresidential building construction	2.5	1.9		1.6	2.1
NAICS 2389 Other specialty trade contractors	2.2	2.2	2.1	2.0	2.0
NAICS 4413 Automotive parts, accessories, and tire retailers	1.8	2.0	2.0	1.9	1.9
NAICS 6216 Home health care services	1.5	1.8	1.8	1.8	1.9
NAICS 4411 Automobile dealers	1.7	1.7	1.8	1.9	1.8
NAICS 8122 Death care services	1.5	1.7	1.7	1.7	1.8
NAICS 8123 Drycleaning and laundry services	1.6	1.9	1.9	1.9	1.8
NAICS 4552 Warehouse clubs, supercenters, and other general merchandise retailers				1.9	1.8
NAICS 4233 Lumber and other construction materials merchant wholesalers	1.3	1.4	1.5	1.6	1.7
NAICS 4599 Other miscellaneous retailers				1.1	1.6
NAICS 6212 Offices of dentists	1.4	1.4	1.4	1.4	1.6
NAICS 4442 Lawn and garden equipment and supplies retailers	1.4	1.5	1.7	1.7	1.6
NAICS 4491 Furniture and home furnishings retailers				1.4	1.4
NAICS 6241 Individual and family services	1.5	1.5	1.6	1.6	1.4

²⁰ (Bureau of Labor Statistics, 2024)

Table 11. Top 25 Location Quotients by NAICS 5-digit Sector, San Juan County, 2019-2023²¹

Industry Title	2019	2020	2021	2022	2023
NAICS 21113 Natural gas extraction	76.5	85.0	87.4	88.7	88.1
NAICS 21311 Support activities for mining	25.4	28.3	31.3	32.7	33.5
NAICS 23712 Oil and gas pipeline and related structures construction	24.7	22.9	16.2	18.4	18.8
NAICS 42471 Petroleum bulk stations and terminals	14.0	15.3	14.1	13.8	12.3
NAICS 21112 Crude petroleum extraction	7.6	8.7	10.1	10.6	10.5
NAICS 48422 Specialized freight (except used goods) trucking, local	5.4	5.1	3.8	4.3	4.5
NAICS 42469 Other chemical and allied products merchant wholesalers	3.6	4.3	4.0	4.0	4.2
NAICS 81131 Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	4.9	4.8	4.9	4.6	4.2
NAICS 56291 Remediation services		3.0	3.0	3.2	4.2
NAICS 81231 Coin-operated laundries and drycleaners	5.1	5.0	4.4	4.9	3.9
NAICS 45913 Sewing, needlework, and piece goods retailers				3.5	3.8
NAICS 42381 Construction and mining (except oil well) machinery and equipment merchant wholesalers	4.4	4.5	4.3	3.8	3.8
NAICS 45993 Manufactured (mobile) home dealers				3.9	3.6
NAICS 56299 All other waste management services		6.0	6.4	5.9	3.4
NAICS 44134 Tire dealers				3.0	3.2
NAICS 54162 Environmental consulting services	3.1	2.6	2.7	2.2	3.1
NAICS 22131 Water supply and irrigation systems	4.0	3.8	3.7		3.1
NAICS 42383 Industrial machinery and equipment merchant wholesalers	4.2	3.8	3.7	3.3	3.0
NAICS 42472 Petroleum and petroleum products merchant wholesalers (except bulk stations and terminals)	1.2	1.2	1.1	2.2	2.5
NAICS 45711 Gasoline stations with convenience stores				2.4	2.4
NAICS 23899 All other specialty trade contractors	2.7	2.8	2.7	2.6	2.4
NAICS 45992 Art dealers					2.4
NAICS 48411 General freight trucking, local		1.8	1.7	2.0	2.1
NAICS 62422 Community housing services		2.3	2.6	2.3	2.1
NAICS 23831 Drywall and insulation contractors			1.1	1.3	2.1

²¹ (Bureau of Labor Statistics, 2024)

Table 12. Top 25 Location Quotients By NAICS 6-digit Sector, San Juan County, 2019-2023²²

Industry Title	2019	2020	2021	2022	2023
NAICS 211130 Natural gas extraction	76.5	85.0	87.4	88.7	88.1
NAICS 213112 Support activities for oil and gas operations	28.8	32.6	35.8	36.3	36.2
NAICS 213111 Drilling oil and gas wells	15.1	14.9	19.8	26.4	30.3
NAICS 237120 Oil and gas pipeline and related structures construction	24.7	22.9	16.2	18.4	18.8
NAICS 424710 Petroleum bulk stations and terminals	14.0	15.3	14.1	13.8	12.3
NAICS 211120 Crude petroleum extraction	7.6	8.7	10.1	10.6	10.5
NAICS 484220 Specialized freight (except used goods) trucking, local	5.4	5.1	3.8	4.3	4.5
NAICS 238992 All other nonresidential trade contractors	4.5	4.7	4.6	4.4	4.3
NAICS 424690 Other chemical and allied products merchant wholesalers	3.6	4.3	4.0	4.0	4.2
NAICS 811310 Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	4.9	4.8	4.9	4.6	4.2
NAICS 562910 Remediation services		3.0	3.0	3.2	4.2
NAICS 812310 Coin-operated laundries and drycleaners	5.1	5.0	4.4	4.9	3.9
NAICS 459130 Sewing, needlework, and piece goods retailers				3.5	3.8
NAICS 423810 Construction and mining (except oil well) machinery and equipment merchant wholesalers	4.4	4.5	4.3	3.8	3.8
NAICS 459930 Manufactured (mobile) home dealers				3.9	3.6
NAICS 811191 Automotive oil change and lubrication shops	3.7	3.8	3.8	3.8	3.5
NAICS 441340 Tire dealers				3.0	3.2
NAICS 541620 Environmental consulting services	3.1	2.6	2.7	2.2	3.1
NAICS 221310 Water supply and irrigation systems	4.0	3.8	3.7		3.1
NAICS 423830 Industrial machinery and equipment merchant wholesalers	4.2	3.8	3.7	3.3	3.0
NAICS 624221 Temporary shelters	2.8	3.1	3.4	3.2	2.9
NAICS 424720 Petroleum and petroleum products merchant wholesalers (except bulk stations and terminals)	1.2	1.2	1.1	2.2	2.5
NAICS 457110 Gasoline stations with convenience stores				2.4	2.4
NAICS 459920 Art dealers					2.4
NAICS 484110 General freight trucking, local		1.8	1.7	2.0	2.1

²² (Bureau of Labor Statistics, 2024)

Table 13. Private Employment Percentages by NAICS Sector, San Juan County and selected comparisons, 2019-2023

Industry Title	San Juan County	New Mexico	United States
NAICS 11 Agriculture, forestry, fishing and hunting	1%	1%	1%
NAICS 21 Mining, quarrying, and oil and gas extraction	13%	4%	0%
NAICS 22 Utilities	1%	1%	0%
NAICS 23 Construction	10%	8%	6%
NAICS 31-33 Manufacturing	4%	4%	10%
NAICS 42 Wholesale trade	4%	3%	5%
NAICS 44-45 Retail trade	17%	14%	12%
NAICS 48-49 Transportation and warehousing	3%	4%	5%
NAICS 51 Information	0%	2%	2%
NAICS 52 Finance and insurance	2%	3%	5%
NAICS 53 Real estate and rental and leasing	1%	2%	2%
NAICS 54 Professional, scientific, and technical services	3%	10%	8%
NAICS 55 Management of companies and enterprises	0%	1%	2%
NAICS 56 Administrative and support and waste management and remediation services	3%	7%	7%
NAICS 61 Educational services	1%	2%	2%
NAICS 62 Health care and social assistance	20%	18%	16%
NAICS 71 Arts, entertainment, and recreation	1%	2%	2%
NAICS 72 Accommodation and food services	14%	13%	11%
NAICS 81 Other services (except public administration)	3%	3%	4%
Total	100%	100%	100%

Table 14. Employment by Employer Type, San Juan County, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
Private	35,598	31,586	31,742	33,743	34,746	-852	-2%
Local Government	8,532	7,898	7,697	8,533	8,992	+460	+5%
State Government	424	435	431	447	468	+44	+10%
Federal Government	1,467	1,550	1,535	1,547	1,552	+85	+6%
Total	46,021	41,469	41,405	44,270	45,758	-263	-1%

Table 15. Private Employment by NAICS Sector, San Juan County, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
NAICS 11 Agriculture, forestry, fishing, and hunting	289	229	223	220	205	-84	-29%
NAICS 21 Mining, quarrying, and oil and gas extraction	4,597	3,785	3,711	4,207	4,394	-203	-4%
NAICS 22 Utilities	728	708	672	536	404	-324	-45%
NAICS 23 Construction	3,689	2,958	2,609	3,010	3,401	-288	-8%
NAICS 31-33 Manufacturing	1,281	993	989	1,229	1,248	-33	-3%
NAICS 42 Wholesale trade	1,679	1,527	1,442	1,488	1,515	-164	-10%
NAICS 44-45 Retail trade	5,339	5,178	5,637	5,822	5,883	+544	+10%
NAICS 48-49 Transportation and warehousing	1,090	905	900	980	1,024	-66	-6%
NAICS 51 Information	213	171	170	187	163	-50	-23%
NAICS 52 Finance and insurance	780	758	750	745	706	-74	-9%
NAICS 53 Real estate and rental and leasing	389	352	328	333	374	-15	-4%
NAICS 54 Professional, scientific, and technical services	1,052	907	826	802	882	-170	-16%
NAICS 55 Management of companies and enterprises	246	251	137	120	128	-118	-48%
NAICS 56 Administrative and support and waste management and remediation services	1,104	996	945	1,031	1,023	-81	-7%
NAICS 61 Educational services	358	314	294	291	294	-64	-18%
NAICS 62 Health care and social assistance	6,517	6,403	6,449	6,528	6,788	+271	+4%
NAICS 71 Arts, entertainment, and recreation	505	234	352	426	456	-49	-10%
NAICS 72 Accommodation and food services	4,494	3,810	4,163	4,624	4,704	+210	+5%
NAICS 81 Other services (except public administration)	1,250	1,109	1,145	1,163	1,156	-94	-8%
Total	35,600	31,588	31,742	33,742	34,748	-852	-2%

Table 16. Private Employment Percentages by NAICS Sector, San Juan County, 2019-2023

Industry Title	2019	2020	2021	2022	2023
NAICS 11 Agriculture, forestry, fishing and hunting	1%	1%	1%	1%	1%
NAICS 21 Mining, quarrying, and oil and gas extraction	13%	12%	12%	12%	13%
NAICS 22 Utilities	2%	2%	2%	2%	1%
NAICS 23 Construction	10%	9%	8%	9%	10%
NAICS 31-33 Manufacturing	4%	3%	3%	4%	4%
NAICS 42 Wholesale trade	5%	5%	5%	4%	4%
NAICS 44-45 Retail trade	15%	16%	18%	17%	17%
NAICS 48-49 Transportation and warehousing	3%	3%	3%	3%	3%
NAICS 51 Information	1%	1%	1%	1%	0%
NAICS 52 Finance and insurance	2%	2%	2%	2%	2%
NAICS 53 Real estate and rental and leasing	1%	1%	1%	1%	1%
NAICS 54 Professional, scientific, and technical services	3%	3%	3%	2%	3%
NAICS 55 Management of companies and enterprises	1%	1%	0%	0%	0%
NAICS 56 Administrative and support and waste management and remediation services	3%	3%	3%	3%	3%
NAICS 61 Educational services	1%	1%	1%	1%	1%
NAICS 62 Health care and social assistance	18%	20%	20%	19%	20%
NAICS 71 Arts, entertainment, and recreation	1%	1%	1%	1%	1%
NAICS 72 Accommodation and food services	13%	12%	13%	14%	14%
NAICS 81 Other services (except public administration)	4%	4%	4%	3%	3%
Total	100%	100%	100%	100%	100%

Table 17. Employment by Employer Type, New Mexico, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
Private	658,241	609,323	626,528	660,670	678,095	+19,854	+3%
Local Government	102,413	95,167	92,910	96,124	99,594	-2,819	-3%
State Government	46,981	47,137	47,000	46,763	48,057	+1,076	+2%
Federal Government	29,039	30,144	29,583	29,307	29,867	+828	+3%
Total	836,674	781,771	796,021	832,864	855,613	+18,939	+2%

Table 18. Private Employment by NAICS Sector, New Mexico, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
NAICS 11 Agriculture, forestry, fishing and hunting	10,992	10,477	10,116	10,181	9,505	-1,487	-14%
NAICS 21 Mining, quarrying, and oil and gas extraction	25,957	19,994	18,531	21,166	23,546	-2,411	-9%
NAICS 22 Utilities	4,222	4,160	4,244	4,195	4,250	+28	+1%
NAICS 23 Construction	50,153	48,577	47,755	49,831	52,995	+2,842	+6%
NAICS 31-33 Manufacturing	28,514	27,201	27,680	28,969	28,668	+154	+1%
NAICS 42 Wholesale trade	21,416	20,202	19,715	20,505	20,965	-451	-2%
NAICS 44-45 Retail trade	89,760	86,526	90,307	93,070	94,480	+4,720	+5%
NAICS 48-49 Transportation and warehousing	19,733	19,373	20,721	24,683	24,229	+4,496	+23%
NAICS 51 Information	11,166	9,076	10,318	10,777	10,223	-943	-8%
NAICS 52 Finance and insurance	23,078	22,567	22,187	22,700	22,584	-494	-2%
NAICS 53 Real estate and rental and leasing	10,721	10,041	9,869	10,364	10,462	-259	-2%
NAICS 54 Professional, scientific, and technical services	59,946	60,225	61,543	64,192	68,156	+8,210	+14%
NAICS 55 Management of companies and enterprises	5,817	5,560	5,442	5,676	5,153	-664	-11%
NAICS 56 Administrative and support and waste management and remediation services	45,716	41,922	44,160	46,729	46,689	+973	+2%
NAICS 61 Educational services	9,710	8,935	9,669	10,783	11,361	+1,651	+17%
NAICS 62 Health care and social assistance	120,471	117,524	119,137	120,914	123,842	+3,371	+3%
NAICS 71 Arts, entertainment, and recreation	10,852	7,067	8,670	10,051	10,849	-3	-0%
NAICS 72 Accommodation and food services	88,804	71,473	77,191	85,379	88,876	+72	+0%
NAICS 81 Other services (except public administration)	21,214	18,424	19,275	20,507	21,263	+49	+0%
Total	658,242	609,324	626,530	660,672	678,096	+19,854	+3%

**Table 19. Private Employment Percentages by NAICS Sector, New Mexico,
2019-2023**

Industry Title	2019	2020	2021	2022	2023
NAICS 11 Agriculture, forestry, fishing and hunting	2%	2%	2%	2%	1%
NAICS 21 Mining, quarrying, and oil and gas extraction	4%	3%	3%	3%	3%
NAICS 22 Utilities	1%	1%	1%	1%	1%
NAICS 23 Construction	8%	8%	8%	8%	8%
NAICS 31-33 Manufacturing	4%	4%	4%	4%	4%
NAICS 42 Wholesale trade	3%	3%	3%	3%	3%
NAICS 44-45 Retail trade	14%	14%	14%	14%	14%
NAICS 48-49 Transportation and warehousing	3%	3%	3%	4%	4%
NAICS 51 Information	2%	1%	2%	2%	2%
NAICS 52 Finance and insurance	4%	4%	4%	3%	3%
NAICS 53 Real estate and rental and leasing	2%	2%	2%	2%	2%
NAICS 54 Professional, scientific, and technical services	9%	10%	10%	10%	10%
NAICS 55 Management of companies and enterprises	1%	1%	1%	1%	1%
NAICS 56 Administrative and support and waste management and remediation services	7%	7%	7%	7%	7%
NAICS 61 Educational services	1%	1%	2%	2%	2%
NAICS 62 Health care and social assistance	18%	19%	19%	18%	18%
NAICS 71 Arts, entertainment, and recreation	2%	1%	1%	2%	2%
NAICS 72 Accommodation and food services	13%	12%	12%	13%	13%
NAICS 81 Other services (except public administration)	3%	3%	3%	3%	3%
Total	100%	100%	100%	100%	100%

Table 20. Employment by Employer Type, United States, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
Private	126,358,744	117,940,012	122,692,752	128,718,060	131,240,997	+4,882,253	+4%
Local Government	14,256,068	13,642,800	13,639,809	13,902,642	14,259,427	+3,359	+0%
State Government	4,666,127	4,592,926	4,543,980	4,541,346	4,657,178	-8,949	-0%
Federal Government	2,824,154	2,928,036	2,882,603	2,863,607	2,929,928	+105,774	+4%
Total	148,105,093	139,103,774	143,759,144	150,025,655	153,087,530	+4,982,437	+3%

Table 21. Private Employment by NAICS Sector, United States, 2019-2023

Industry Title	2019	2020	2021	2022	2023	Δ	%Δ
NAICS 11 Agriculture, forestry, fishing and hunting	1,263,160	1,241,147	1,246,927	1,258,501	1,251,522	-11,638	-1%
NAICS 21 Mining, quarrying, and oil and gas extraction	675,094	540,312	512,611	555,956	583,861	-91,233	-14%
NAICS 22 Utilities	548,712	543,628	543,373	553,841	575,386	+26,674	+5%
NAICS 23 Construction	7,451,476	7,203,279	7,413,458	7,714,898	7,941,364	+489,888	+7%
NAICS 31-33 Manufacturing	12,776,157	12,083,479	12,299,558	12,759,129	12,866,643	+90,486	+1%
NAICS 42 Wholesale trade	5,883,948	5,620,470	5,695,101	5,976,790	6,099,085	+215,137	+4%
NAICS 44-45 Retail trade	15,602,881	14,758,276	15,345,787	15,479,044	15,525,880	-77,001	-0%
NAICS 48-49 Transportation and warehousing	5,491,748	5,547,576	5,958,600	6,418,254	6,439,264	+947,516	+17%
NAICS 51 Information	2,849,185	2,709,771	2,838,225	3,049,543	2,975,637	+126,452	+4%
NAICS 52 Finance and insurance	6,027,485	6,045,347	6,146,600	6,257,678	6,286,955	+259,470	+4%
NAICS 53 Real estate and rental and leasing	2,292,359	2,160,951	2,219,856	2,345,386	2,388,665	+96,306	+4%
NAICS 54 Professional, scientific, and technical services	9,542,312	9,458,657	9,894,940	10,540,481	10,726,898	+1,184,586	+12%
NAICS 55 Management of companies and enterprises	2,407,183	2,318,008	2,341,133	2,503,466	2,548,692	+141,509	+6%
NAICS 56 Administrative and support and waste management and remediation services	9,284,487	8,547,956	9,056,359	9,535,918	9,329,814	+45,327	+0%
NAICS 61 Educational services	2,937,234	2,727,068	2,827,338	2,996,380	3,122,317	+185,083	+6%
NAICS 62 Health care and social assistance	20,184,056	19,550,905	19,867,994	20,353,997	21,263,545	+1,079,489	+5%
NAICS 71 Arts, entertainment, and recreation	2,426,459	1,727,920	1,977,729	2,308,345	2,484,357	+57,898	+2%
NAICS 72 Accommodation and food services	14,030,794	11,072,658	12,151,343	13,410,463	13,955,389	-75,405	-1%
NAICS 81 Other services (except public administration)	4,553,161	3,944,955	4,146,306	4,404,912	4,560,949	+7,788	+0%
NAICS 99 Unclassified	130,853	137,650	209,516	295,078	314,774	+183,921	+141%
Total	126,358,744	117,940,013	122,692,754	128,718,060	131,240,997	+4,882,253	+4%

Table 22. Private Employment Percentages by NAICS Sector, United States, 2019-2023

Industry Title	2019	2020	2021	2022	2023
NAICS 11 Agriculture, forestry, fishing and hunting	1%	1%	1%	1%	1%
NAICS 21 Mining, quarrying, and oil and gas extraction	1%	0%	0%	0%	0%
NAICS 22 Utilities	0%	0%	0%	0%	0%
NAICS 23 Construction	6%	6%	6%	6%	6%
NAICS 31-33 Manufacturing	10%	10%	10%	10%	10%
NAICS 42 Wholesale trade	5%	5%	5%	5%	5%
NAICS 44-45 Retail trade	12%	13%	13%	12%	12%
NAICS 48-49 Transportation and warehousing	4%	5%	5%	5%	5%
NAICS 51 Information	2%	2%	2%	2%	2%
NAICS 52 Finance and insurance	5%	5%	5%	5%	5%
NAICS 53 Real estate and rental and leasing	2%	2%	2%	2%	2%
NAICS 54 Professional, scientific, and technical services	8%	8%	8%	8%	8%
NAICS 55 Management of companies and enterprises	2%	2%	2%	2%	2%
NAICS 56 Administrative and support and waste management and remediation services	7%	7%	7%	7%	7%
NAICS 61 Educational services	2%	2%	2%	2%	2%
NAICS 62 Health care and social assistance	16%	17%	16%	16%	16%
NAICS 71 Arts, entertainment, and recreation	2%	1%	2%	2%	2%
NAICS 72 Accommodation and food services	11%	9%	10%	10%	11%
NAICS 81 Other services (except public administration)	4%	3%	3%	3%	3%
NAICS 99 Unclassified	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

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