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Moderate Growth with a Stronger Industrial Sector

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U.S. Macroeconomic Outlook

Real economic growth remains solid in the United States. The economy has benefited from improved business investment as a result of reduced regulation and the 2017 tax reform. The industrial sector, in particular, has seen strong growth. The U.S. economy also has benefited from faster economic growth in Europe and Asia, although growth has slowed in Europe more recently. Solid consumer spending has contributed to economic growth.

These developments suggest a more rapidly growing economy. However, growth will remain moderate due to three factors which limit expansion of the labor force. First, the pace of job growth has been slowed by the ongoing retirement of "baby boom" age workers. Second, there are pockets of skills mismatch in precision production and STEM occupations which limit the available workforce. Third, employers hiring in many occupations face issues with applicant quality, including the ability of applicants to pass relevant background checks, which limit hiring.

The rate of growth also is moderated by two factors which limit confidence among both businesses and households, in part by raising the prospects of future tax increases. First, in early 2018, President Trump and leaders in Congress pushed through a significant increase in spending of similar magnitude as the 2017 tax cuts. Second, there has been no effort to reform the federal government's main two entitlement programs, Social Security and Medicare.

Policy uncertainty also can discourage business and consumer confidence. In particular, continued uncertainty about trade policy outcomes is a risk for the economy, even if disruptions to trade have so far been modest. The pace of short-term interest rate increases by the U.S. Federal Bank is another source of uncertainty. The most likely outcome is that the Federal Reserve will raise interest rates as the economy allows. However, the rate of economic growth would be impacted if interest rate increases are too rapid.

The three-year outlook calls for solid GDP growth, continued low unemployment and moderate inflation. Real GDP is expected to grow by 2.8% in 2018 and 2.7% in 2019 and 2020.

U.S. job growth will follow a different pattern, falling as the reserve of discouraged workers dwindles, and as issues with skills mismatch and worker quality persist. Job growth will hit 1.5% in 2018, fall to 1.3% in 2019 and fall further to 1.1% in 2020.

Improvements in employment will keep the unemployment rate low but will spark only a moderate increases in real wages. The inflation rate will remain at the Federal Reserve Bank's target rate of 2.0%. The inflation rate will reach 2.0% in 2018 and then stay at 2.0% in both 2019 and 2020.

Nebraska Outlook

Nebraska will record solid economic growth during the forecast period but will lag U.S. growth. While Nebraska's large farming sector has stabilized, it will not contribute much to economic growth during the forecast period. Job growth also will be sluggish in transportation, retail trade and state and local government. Job growth, however, will be stronger in the services, finance, manufacturing and construction. Projected growth rates for 2018 to 2020 are presented in Table 1.

Employment will grow by 0.8% to 1.0% per year, below the national rate. Nonfarm income will grow between 3.6% and 3.8% each year. This growth is sufficient to exceed inflation and population growth, implying growth in real per capita income in Nebraska from 2018 through 2020.

Table 1— Key Economic Growth Rates

	Nonfarm Employment	Nonfarm Personal Income (nominal)	Net Farm Income (nominal)
2017	0.2%	2.5%	-1.5%
2018	0.8%	3.8%	-6.7%
2019	1.0%	3.6%	5.5%
2020	1.0%	3.7%	5.7%

Note: Nominal income growth includes inflation.

Employment

Table 2 compares the current forecast for nonfarm employment with our previous forecast from December 2017. Note that the U.S. Department of Labor significantly lowered its estimate of Nebraska job growth for 2017. Employment growth was lower in the services sector, especially business and professional services. Employment growth will recover to 0.8% in 2018, re-accelerating throughout the year. The job growth outlook also is slightly lower in 2019 and 2020, due to a weak retail sector. That industry continues to restructure given increased on-line competition.

Table 2— Comparison of Non-Farm Employment Forecasts

	December 2017 Forecast	Current Forecast
2017	1.0%	0.2%
2018	1.1%	0.8%
2019	1.2%	1.0%
2020	1.1%	1.0%

Construction and Mining

Over the next three years the Nebraska construction industry will benefit from population and household growth, rising real income, low interest rates and a growing services and financial sector. These factors will combine to support the simultaneous expansion of residential and commercial construction activity. Residential construction will be strongest in the Omaha and Lincoln areas, and in more rapidly growing micropolitan areas such as Kearney, Grand Island and Fremont. Commercial activity will include new office space for service and financial sector employees and space to accompany new residential developments. State and local governments also will expand road construction thanks to recent increases in the state gasoline tax and the reallocation of sales tax and other general revenue to road building. The construction sector is expected to add 3,200 jobs over the next three years, with job growth of 2.0% each year.

Manufacturing

The Nebraska manufacturing sector is experiencing its strongest growth in well over a decade. The sector is experiencing increased employment, rising prices, growing exports, and low customer inventories across virtually all industry groups. While there are concerns about the adequacy of U.S. transportation infrastructure, supply chain bottlenecks, labor availability, rising input prices, and possible trade wars, a broad-based, positive trend for manufacturing is expected to continue through the end of the year. While it is unlikely the general level of recent increase in output and employment can be sustained into the next year, the manufacturing sector should continue to add employment in 2019 and 2020.

While experiencing recent growth, employment in Nebraska's manufacturing sector remains more than 3 percent below the pre-recession level of slightly more than 100,000 jobs. Recently, both the durable and non-durable goods industry segments have experienced relatively strong growth. There are indications that both machinery manufacturing and transportation equipment are poised to see growth after experiencing recent declines in employment.

Table 3—Number of Nonfarm Jobs and Percent Changes by Industry Annual Averages (in thousands of jobs)

	Nonfarm Total	Construction, Mining & Natural Resources	Durables	Non-durables	Wholesale Trade	Retail Trade	Trans-portation and Utilities	Inform-ation	Financial	All Services	Federal Gov't	Local Gov't
2005	934.0	47.8	48.4	52.9	40.6	107.2	52.3	20.2	64.5	339	16.3	144.7
2006	945.5	48.4	49.7	51.8	40.8	106.4	53.4	19.5	66.7	346.9	16.2	145.9
2007	961.6	50.5	50.0	51.4	41.1	107.5	56.2	19.8	68.7	354.6	15.9	146.5
2008	969.4	50.1	49.3	52.1	42	107	56.1	19.1	69.2	361.2	16.1	147.8
2009	949.7	47.6	42.6	50.6	41.2	104.4	52.6	17.9	68.4	356.5	16.5	152
2010	945.0	42.6	41.4	50.3	40.6	103.9	51.3	17.5	68.9	359.4	17.3	152.3
2011	952.6	41.5	42.5	50.9	40.8	104.8	52.2	17.6	70.1	364.7	16.6	151.5
2012	968.7	43.3	44.0	51.0	41.3	105.4	53.0	17.8	71.0	374.2	16.7	151.7
2013	980.3	45.3	45.0	51.5	42	106.3	53.0	17.7	71.7	379.1	16.5	152.4
2014	992.8	47.4	45.9	51.6	42.9	108.2	53.2	17.8	71.9	384.3	16.6	153.0
2015	1,006.5	50.0	45.4	52.0	42.4	109.7	54.6	18.3	71.9	391.2	16.6	154.4
2016	1,015.1	51.6	44.0	52.9	41.7	110.3	52.2	18.5	73.2	397.6	16.7	156.2
2017	1,017.6	51.8	43.9	54.2	40.9	109.2	52.7	18.2	74.0	400.1	16.8	155.9
Forecast Number												
2018	1,025.5	52.8	44.1	54.7	40.8	109.2	52.9	18.0	74.7	404.9	16.9	156.4
2019	1,035.5	53.9	44.3	55.8	40.8	109.5	53.1	18.0	75.3	410.6	17.0	157.1
2020	1,046.3	55.0	44.5	56.4	40.9	110.1	53.3	18.0	75.9	416.7	17.6	157.9
Forecast Number												
2018	0.8%	2.0%	0.5%	1.0%	-0.2%	0.0%	0.4%	-1.0%	0.9%	1.2%	0.5%	0.3%
2019	1.0%	2.0%	0.5%	2.0%	0.0%	0.3%	0.4%	0.0%	0.8%	1.4%	0.6%	0.5%
2020	1.0%	2.0%	0.5%	1.0%	0.1%	0.5%	0.4%	0.0%	0.8%	1.5%	3.8%	0.5%

Source: http://data.bls.gov/cgi-bin/dsrv, 2018

The sluggish farm economy and shortages of key work skills will continue to be the major impediments to faster growth in Nebraska's manufacturing sector. In particular, implement manufacturers will continue to face weak domestic demand due to stagnant farm incomes, although continued increases in crop output should create more opportunities in the food processing sector. Skill shortages in part reflect continuous pressure to upgrade worker skill in manufacturing. Some manufacturing businesses curtail hiring and investment due to this skills gap. For facilities located in rural areas, limited housing availability also is impacting the ability to recruit professionals needed to operate manufacturing plants.

Non-durable goods manufacturing is expected to add 2,200 jobs between 2018 and 2020. Non-durable manufacturing employment is expected to grow by 1.0% in 2018, 2.0% in 2019 (with the opening of the Lincoln Poultry (Costco) facility in Fremont, Nebraska), and 1.0% in 2020. Durable goods manufacturing will add 600 jobs, with job gains of 0.5% per year.

Transportation and Warehousing

Little employment growth is expected in the Nebraska transportation and warehousing industry. A growing national economy should benefit the industry; however, transportation also faces multiple challenges. The rail sector is under pressure due to weak demand for coal hauling as the electric utility industry shifts away from coal-fired power plants. The trucking sector faces labor shortages. In particular, the long haul trucking sector has had difficulty recruiting new drivers. Transportation and warehousing employment is expected to add just 200 jobs during 2018. Employment growth will remain at 0.4% in 2019 and 2020 as well. Cumulatively, the industry will add just 600 jobs over the entire 3-year forecast period.

Wholesale Trade

The long-term trend in wholesale trade employment has been flat, as moderate growth in demand has been countered by rising labor productivity. This trend is expected to continue, especially with limited growth in the agriculture sector, which is an important part of our state's wholesale trade industry. A portion of industry employment also will be reclassified to the services sector in 2018. Industry employment will fall by 100 jobs in 2018 but gain those jobs back by 2020.

Retail Trade

Given rapidly growing on-line sales and rising labor productivity, strong growth in retail sales is required to increase retail employment. Retail sales will rise in Nebraska during the forecast period given rising population, employment and household income. However, the rate of growth will not be sufficient to significantly increase retail employment. Growth will be especially challenged in 2018, with the closure of several department stores in Nebraska.

Retail employment is expected to grow by 900 jobs cumulatively between 2018 and 2020. Employment will be flat in 2018, grow by 0.3% during 2019 and by 0.5% during 2020. The outlook for retail sales is discussed at the end of this report.

Information

The information industry contains a diverse group of businesses including print publishing, broadcast media, data processing, web site design and telecommunications. There has been substantial labor productivity growth in all of these industries. Such rising productivity is a positive for the economy and industry wages but is negative for information industry job growth.

Employment dropped by 300 jobs in the high-wage information industry during 2017 but industry employment should steady during the forecast period. There has been significant growth in access to high-speed internet throughout Nebraska in recent years, including the introduction of Allo in Lincoln. Improved infrastructure should support employment for information technology-oriented segments of the industry. Employment will drop by 200 in 2018 and remain steady in 2019 and 2020.

Financial Services

The financial services industry includes finance, insurance, and real estate. The finance and real estate segments have expanded with the economy over the last few years. These patterns are expected to continue as a growing Nebraska population and business community demands more financial services. Further, the financial services industry, with the exception of insurance, also should benefit from continued low interest rates. Finally, deregulation of the financial sector should help the industry expand in the coming years.

Growth will be more limited in the insurance sector. Insurance carriers are a major employer in Nebraska, and benefit from the state's skilled labor force. Insurance carrier employment, however, is expected to be flat due to competitive pressures facing the industry. Insurance offices, however, should add employment like their counterparts in finance and real estate.

Overall, the financial services industry will add between 600 to 700 jobs per year. The rate of growth will be 0.9% in 2018, 0.8% in 2019 and 0.8% in 2020.

Services

The services industry accounted for 39% of Nebraska employment in 2017. The large industry contains a diverse group of businesses, including the fast growing professional, scientific and technical services sector. The industry also contains health care, the largest sector in the Nebraska economy as measured by employment as well as hospitality businesses, which encompasses lodging, food services, arts, entertainment, and recreation. The services industry also includes personal services, such as barbers, carwashes and repair.

The services industry is also among the fastest growing part of the economy. The largest component of the services industry, health care, is expected to grow by 1.3% to 1.5% per year. Aggregate health care employment will benefit from population and income growth and the general aging of the population. However, restructuring in the hospital sector will limit overall growth in health care employment.

Professional and business services will benefit from the steady expansion of commercial activity and the expansion of Nebraska technology companies. The professional and business services segment is expected to grow by 1.0% to 1.2% per year. A similar rate of job growth is expected for the hospitality segment. Real income growth is supporting leisure spending. For the same reason, the personal services sector will also add employment. Overall, services employment will grow by 1.2% to 1.5% per year. This translates into between 4,800 and 6,100 net new jobs per year. Service sector job growth therefore will account for more than half of overall Nebraska job growth.

Government

Slow growth is expected in Federal government employment through 2019. However, in 2020 Federal employment will rise by 600 jobs due to the decennial census.

State and local government job growth is expected to remain below the rate of population growth in Nebraska (0.7% per year) during the forecast period. State government employment has been pressured in recent years due to large state budget deficits. While there is a need to hire in some agencies, attempts to restrain growth in state government are expected to continue. Further, rising retirements among state government employees create an opportunity to restrain employment. There was a significant expansion of government employment in the late 1960s and early 1970s and many of those hired are now reaching retirement age.

These same forces also pressure employment in local government. However, there will be pressure to hire teachers in metropolitan school districts, given growth in the school-age population. Rural local governments will continue to be challenged by weak growth in sales tax revenue and declining values for agricultural land.

Growth in state and local government will improve later in the forecast period. Employment will grow by 0.3% during 2018. Growth will improve to 0.5% in 2019 and in 2020.

Personal Income

As seen in Table 4, nominal nonfarm income grew by an estimated 2.5% in 2017. Slow employment growth was the primary reason for the weak increase. Employment growth is expected to improve, to 0.8% – 1.0%, during the forecast period. Growing real wages and modest inflation also will push nominal nonfarm income up by 3.6% to 3.8% per year from 2018 to 2020. However, forecasts are somewhat below those made during the last forecast, in December 2017, due to a modest decline in forecast employment growth.

Nebraska farm income reached near record levels in 2013 but dropped sharply from 2014 to 2016 along with commodity prices. Farm income stabilized in 2017 along with agricultural commodity prices. Growth in farm income will be limited during the forecast period since crop prices are not expected to rise. A drop in government payments will lead to falling farm income in 2018 but payments will rise in 2020. Farm income is expected to be lower in 2018 relative to the last forecast in December 2017.

Table 4— Comparison of Forecasts for Nominal Income

Nonfarm Income

	December 2017 Forecast	Current Forecast
2017	2.6%	2.5%
2018	3.9%	3.8%
2019	4.0%	3.6%
2020	3.9%	3.7%

Farm Income

	December 2017 Forecast	Current Forecast
2017	5.5%	-1.5%
2018	5.9%	-6.7%
2019	0.6%	5.5%
2020	0.0%	5.7%

Note: Nominal income growth includes inflation.

Nonfarm Personal Income

Table 5 shows forecasts for the major sources of nonfarm income. Annual growth in wage and salary income will be 3.8%, given moderate inflation, job growth and real wage growth. Real wage growth will be strongest in 2018. Following the recent pattern, other labor income (i.e., benefits) will grow at the same rate as wage income.

Table 5—Nonfarm Personal Income and Selected Components and Net Farm Income (USDA) ($ millions)

	Consumer Price Index	Nonfarm Personal Income	Dividends, Interest, & Rent	Total Personal Current Transfer Receipts	Nonfarm Wages & Salaries (Wages & Salaries — Farm Wages)	Other Labor Income	Contributions to Social Insurance	Residential Adjustment	Nonfarm Proprietor Income	Net Farm Income (USDA)
Millions of Dollars										
2005	195.3	$57,244	$11,261	$8,269	$32,064	$8,195	$5,222	-$989	$3,666	$2,972
2006	201.6	$61,300	$12,287	$8,933	$33,864	$8,418	$5,617	-$1,008	$4,422	$2,008
2007	207.3	$65,241	$13,898	$9,424	$35,786	$8,777	$5,843	-$990	$4,189	$2,945
2008	215.3	$69,161	$14,781	$10,591	$37,091	$9,098	$6,029	-$968	$4,597	$3,485
2009	214.5	$68,421	$13,083	$11,057	$36,554	$9,306	$6,045	-$955	$5,420	$2,752
2010	218.1	$70,957	$13,078	$11,866	$37,052	$9,186	$6,262	-$883	$6,920	$3,683
2011	224.9	$76,259	$14,309	$12,102	$38,103	$9,441	$5,727	-$938	$8,968	$7,492
2012	229.6	$80,872	$16,366	$12,205	$39,943	$10,217	$5,891	-$954	$8,985	$4,898
2013	233.0	$79,052	$15,237	$12,363	$41,020	$10,137	$6,754	-$922	$7,972	$7,456
2014	236.7	$85,331	$16,636	$12,851	$42,894	$10,809	$7,093	-$898	$10,132	$5,813
2015	237.0	$88,674	$17,598	$13,482	$45,168	$10,795	$7,381	-$974	$9,987	$4,777
2016	240.0	$90,874	$17,729	$13,932	$46,384	$11,320	$7,590	-$1,015	$10,113	$3,840
2017	245.1	$93,112	$18,182	$14,385	$47,326	$11,676	$7,844	-$1,046	$10,433	$3,782
Forecast Number										
2018	250.0	$96,684	$18,873	$14,931	$49,111	$12,109	$8,117	-$1,074	$10,850	$3,529
2019	255.0	$100,186	$19,458	$15,528	$50,968	$12,558	$8,400	-$1,102	$11,176	$3,724
2020	260.1	$103,858	$20,042	$16,181	$52,925	$13,031	$8,699	-$1,132	$11,511	$3,935
Forecast % (nominal growth)										
2018	2.0%	3.8%	3.8%	3.8%	3.8%	3.7%	3.5%	2.7%	4.0%	-6.7%
2019	2.0%	3.6%	3.1%	4.0%	3.8%	3.7%	3.5%	2.7%	3.0%	5.5%
2020	2.0%	3.7%	3.0%	4.2%	3.8%	3.8%	3.6%	2.7%	3.0%	4.7%

Source: http://www.bea.gov, 2018. Note: Nominal income growth includes inflation.

Modest growth is expected in dividend, interest, and rent income as interest rates rise slowly and dividends trend up. There will be faster growth in transfer payments as a growing number of "baby-boom" generation workers begin to receive social security payments. Proprietor income will grow at a moderate rate. Annual growth in proprietor income slows in the late business cycle.

Farm Income

After reaching near record levels in 2013, farm income dropped sharply in Nebraska through 2016. The drop resulted from a steep decline in crop prices, and in 2016, a steep drop in cattle prices.

Farm income begin to stabilize in 2017. Crop and livestock prices ended their sharp decline. In addition, 2017 was another year for strong yields and entrepreneurial Nebraska farmers found ways to reduce costs and expand revenue. The net result was a slight drop in farm income in 2017.

Farm income is expected to fall by 6.7% in 2018 as farmers contend with a drop in federal price supports from the Agricultural Risk Coverage and Price Loss Coverage programs. Revenue and price support levels in these programs are based on a rolling average of past prices and yields, and decline over time as the industry moves further from the peak prices of 2011 through 2013. In 2018, Nebraska farm incomes will fall given an expected $430 million drop in government payments.

Farm income will rise by 5.5% in 2019 and 5.7% in 2020 despite flat crop and livestock prices. Increases in farm income will depend on the skill of farmers and ranchers to lower costs and find new revenue. Federal government payments also are expected to rise in 2020 as farmers take advantage of price support options in a new farm bill which do not depend on past crop prices. The new farm bill, however, is not yet finalized. Farmers also face risks due to uncertain trade and biofuels policies.

Net Taxable Retail Sales

In Table 6, data on net taxable retail sales are divided into motor vehicle sales and non-motor vehicle sales. The distinction is important. Motor vehicle net taxable sales grow over time, but at an uneven rate. Non-motor vehicle taxable sales rise in step with Nebraska income, but are affected by periodic changes to Nebraska's sales tax base. Changes to the base are not anticipated during the forecast period.

In 2018, there will be stronger growth in non-motor vehicle taxable sales. Solid income growth and a major construction project to build the Facebook facility in Sarpy County will lead to faster growth in Nebraska taxable sales. Non-motor vehicle sales tax collections will rise by 4.2% in 2018. In 2019 and 2020, sales tax revenue will grow less rapidly than personal income. This is the typical annual pattern as ever larger share of household income is spent on services not subject to the sales tax.

Somewhat slower growth is expected for motor vehicle net taxable sales. Growth in motor vehicle sales will rise with personal income, as relatively low interest rates support durable goods purchases, including motor vehicles. However, the growth of vehicle purchases is slowing across the country as many older vehicles have been replaced in recent years. Motor vehicle net taxable sales will rise by 2.5% in 2018, 2.7% in 2019 and 3.0% in 2020.

Growth in Nebraska vehicle sales and non-motor vehicle taxable sales will combine to produce growth in overall net taxable sales from 2018 to 2020. Overall net taxable sales will grow by 4.0% in 2018. Growth will then fall to 3.3% in 2019 and 3.4% in 2020. All growth rates will exceed the rate of inflation, which will be 2.0% in 2018 through 2020. This increase in real, inflation-adjusted taxable sales is consistent with the rise in real income in Nebraska.

Table 6—Net Taxable Retail Sales, Annual Totals ($ millions)

	Consumer Price Index	Total Net Taxable Sales	Motor Vehicle Net Taxable Sales	Non Motor Vehicle Net Taxable Retail Sales
Millions of Dollars				
2005	195.3	$24,443	$2,751	$21,691
2006	201.6	$24,978	$2,661	$22,317
2007	207.3	$26,237	$2,902	$23,335
2008	215.3	$26,664	$2,943	$23,721
2009	214.5	$25,709	$2,798	$22,911
2010	218.1	$26,683	$3,021	$23,662
2011	224.9	$28,206	$3,287	$24,919
2012	229.6	$29,546	$3,575	$25,970
2013	233.0	$31,064	$3,720	$27,344
2014	236.7	$32,068	$3,894	$28,174
2015	237.0	$32,494	$4,043	$28,450
2016	240.0	$33,218	$4,048	$29,170
2017	245.1	$33,937	$4,159	$29,778
Forecast Number				
2018	250.0	$35,292	$4,263	$31,029
2019	255.0	$36,462	$4,378	$32,084
2020	260.1	$37,716	$4,510	$33,206
Forecast % (nominal growth)				
2018	2.0%	4.0%	2.5%	4.2%
2019	2.0%	3.3%	2.7%	3.4%
2020	2.0%	3.4%	3.0%	3.5%

Source: Nebraska Department of Revenue, 2018. Note: Nominal taxable sales growth includes inflation.

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