

# Local Outlook: Missoula County

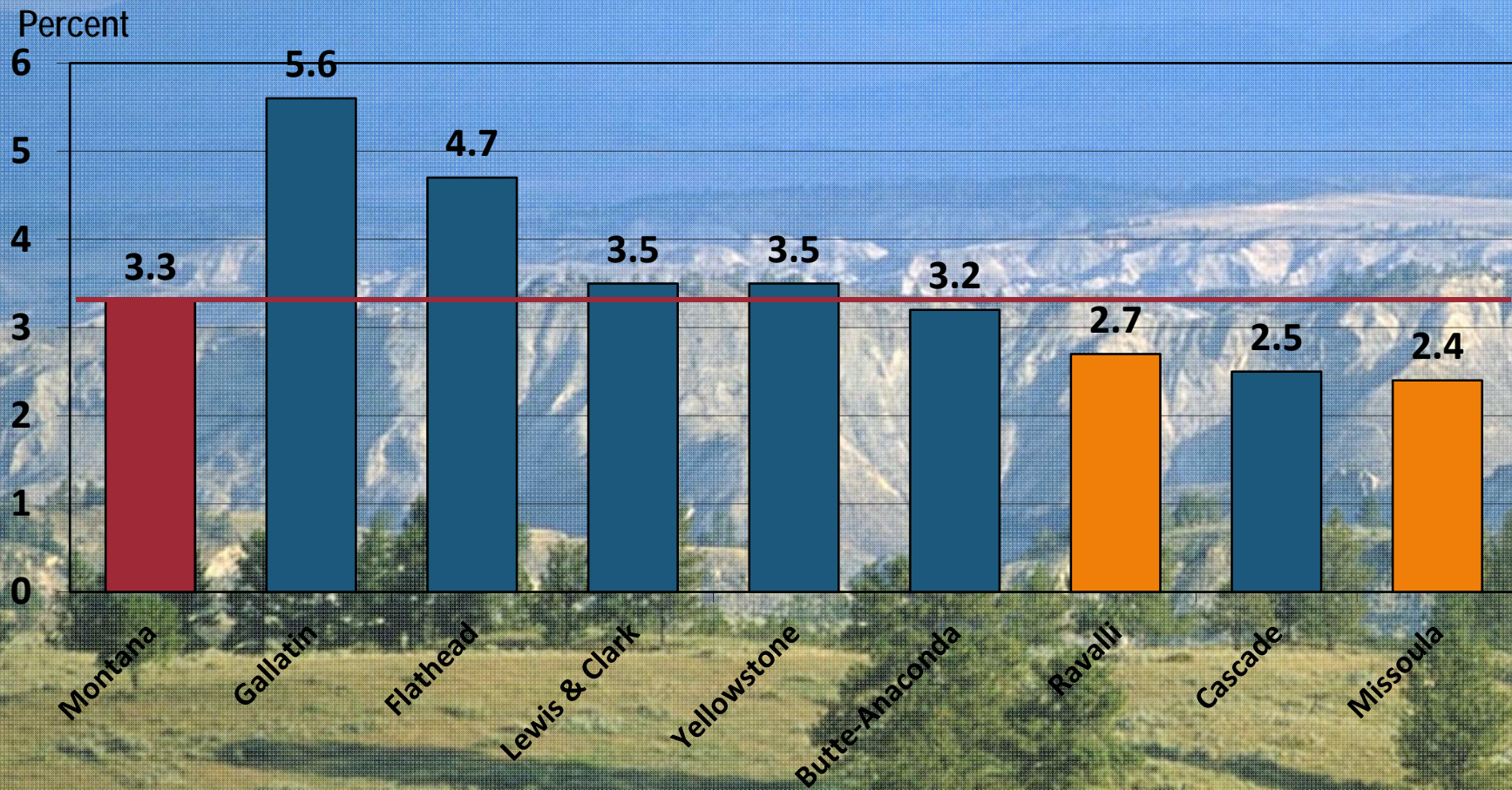
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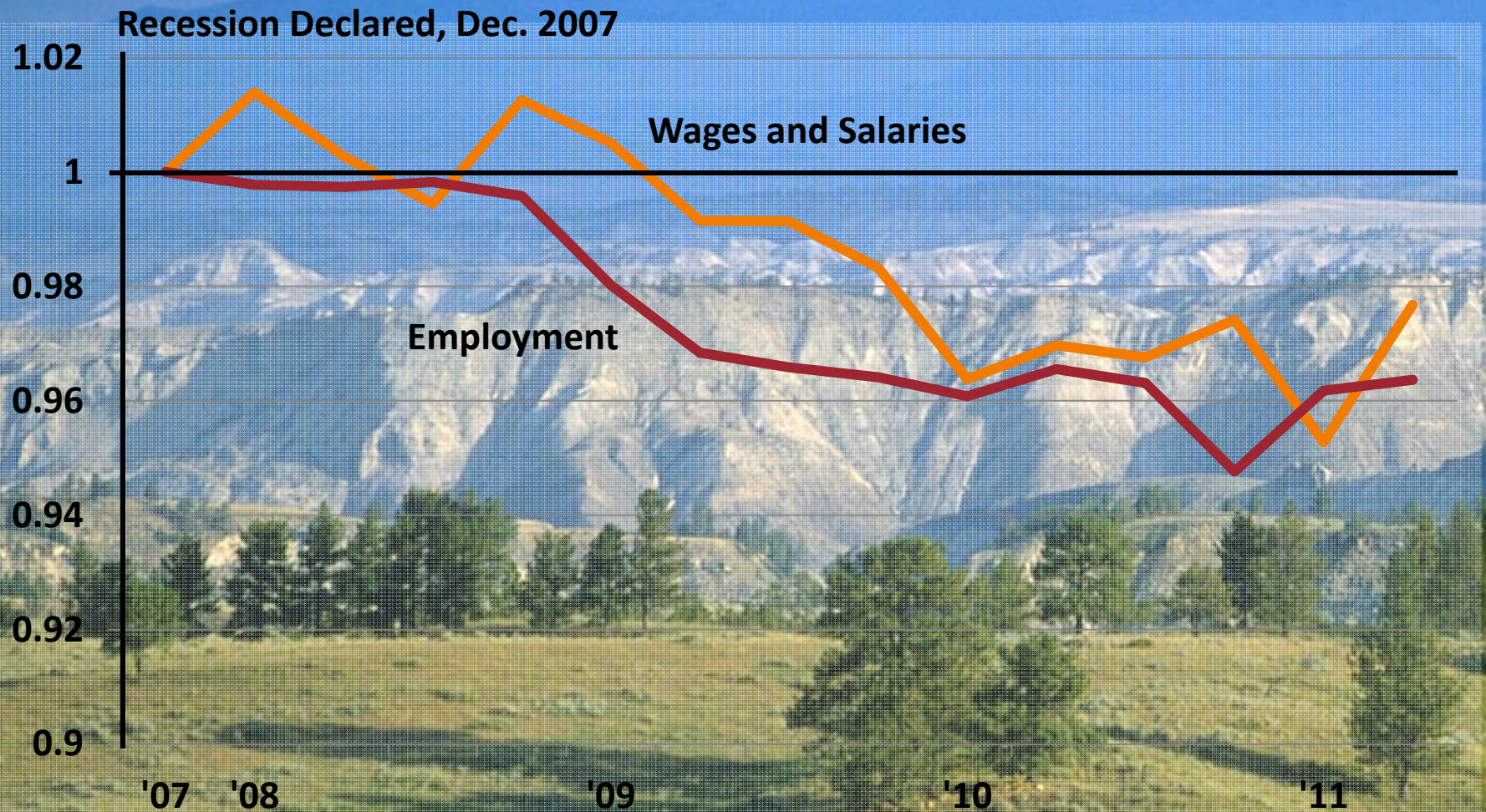
## Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2001-2007



# Recession Scorecard

	Duration (Years)	Severity (% Change)
Lewis & Clark County	<b>What Recession?</b>	
Cascade County		
Yellowstone County	1	-1.5%
Butte - Anaconda	1	-0.8%
Missoula County	3-4	-4.9%
Gallatin County	2	-7.9%
Flathead County	4	-10.2%
Ravalli County	4	-11.4%

# Non-Farm Employment and Inflation Adjusted Wages and Salaries, Seasonally Adjusted, Missoula County



# Missoula County's Economic Base 2009-2011

• Other	6%
• Nonresident Travel	7%
• Transportation	11%
• Wood Products	6%
• Federal Gov't	15%
• Trade Center Medical	15%
• Trade Center Retail, Service	19%
• UM, Other State	21%

Construction

Some Recovery

Energy Growth

Flat

Stable at Best

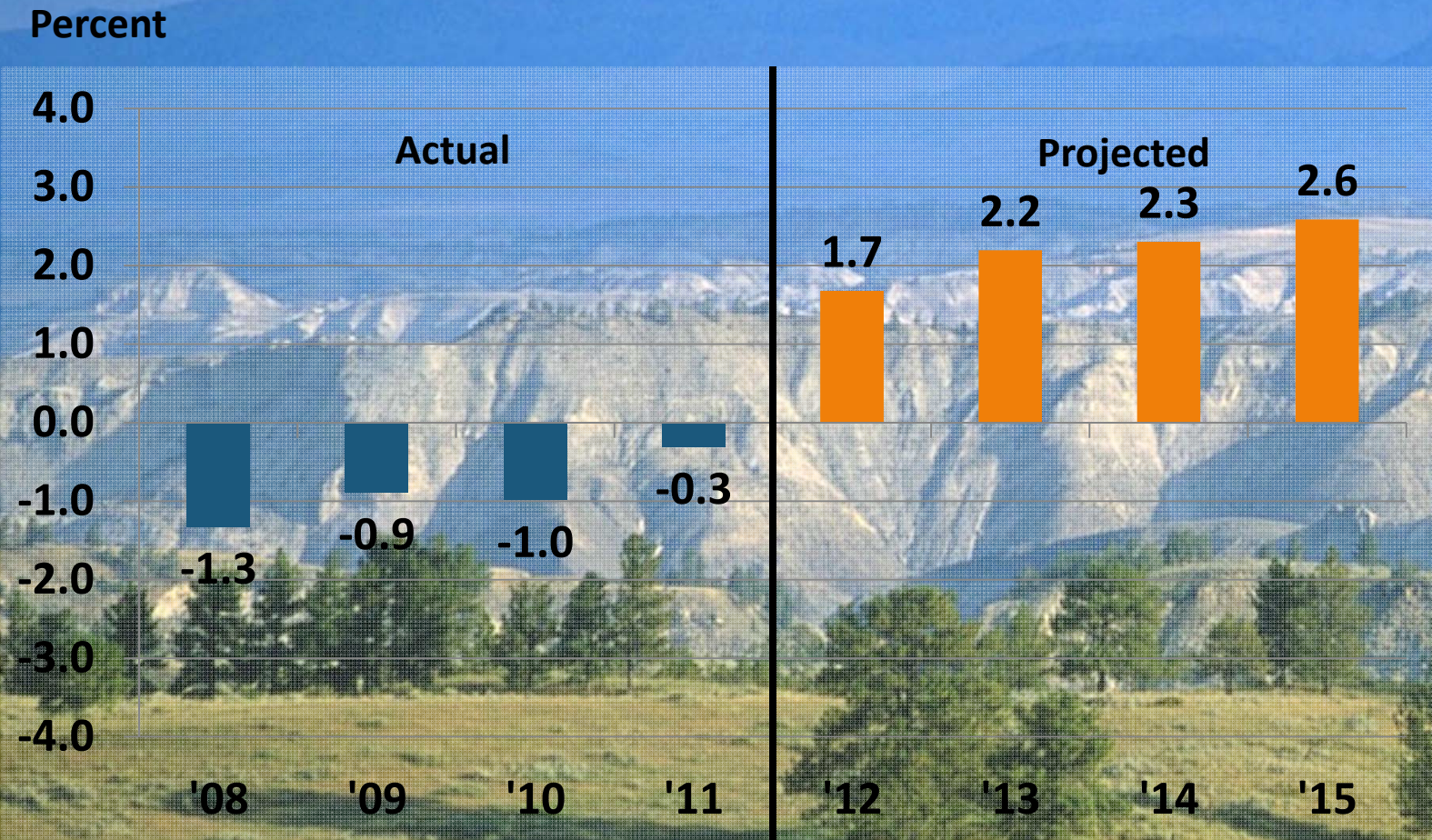
Reform?

Negative to Flat

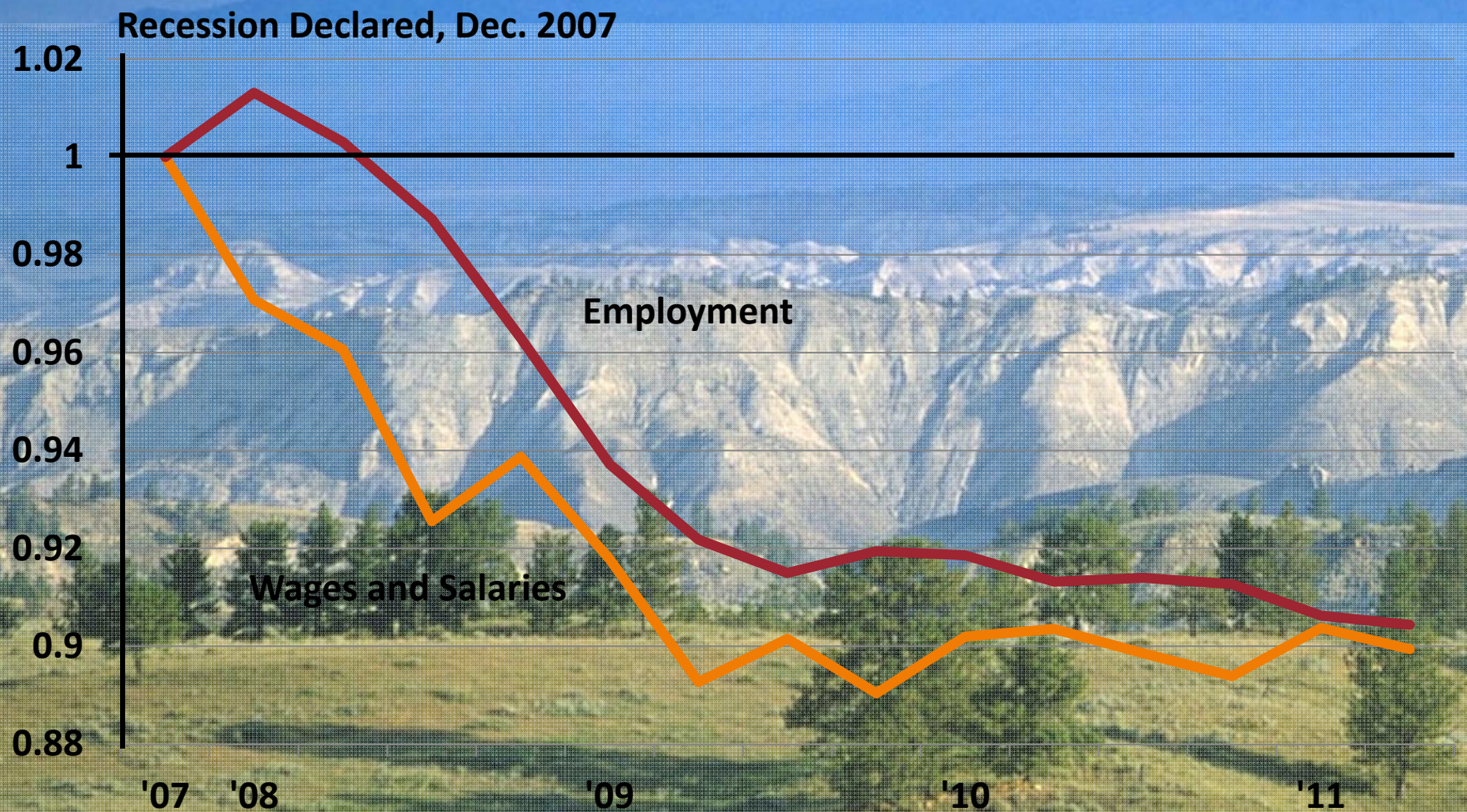
Pay Freeze, Increased Research

Not Before 2013

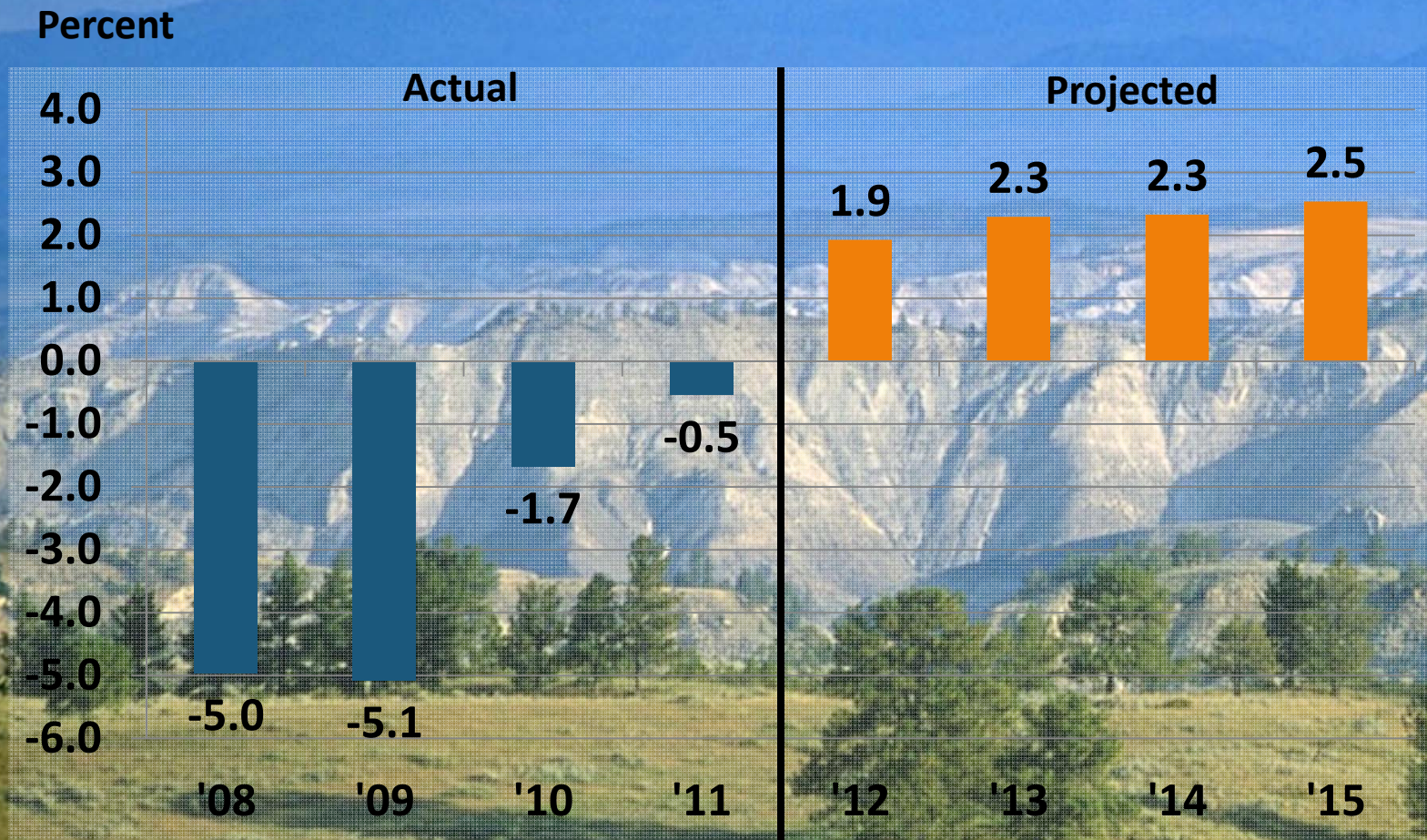
# Actual and Projected Change in Nonfarm Earnings, Missoula County, 2008-2015



# Non-Farm Employment and Inflation Adjusted Wages and Salaries, Seasonally Adjusted, Ravalli County

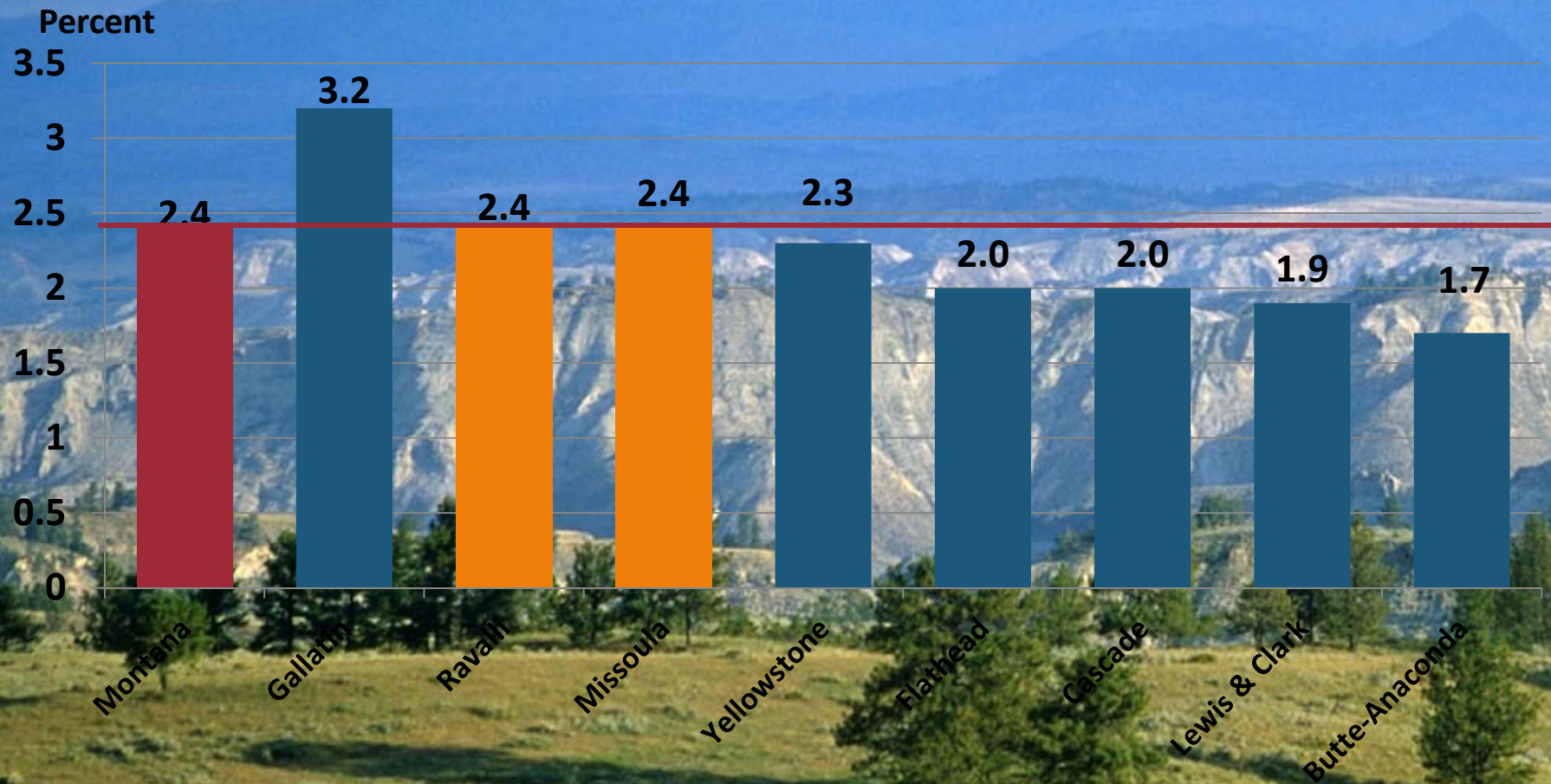


# Actual and Projected Change in Nonfarm Earnings, Ravalli County, 2008-2015





## Projected Annual Percent Change in Nonfarm Labor Income (in Constant Dollars) 2011-2015

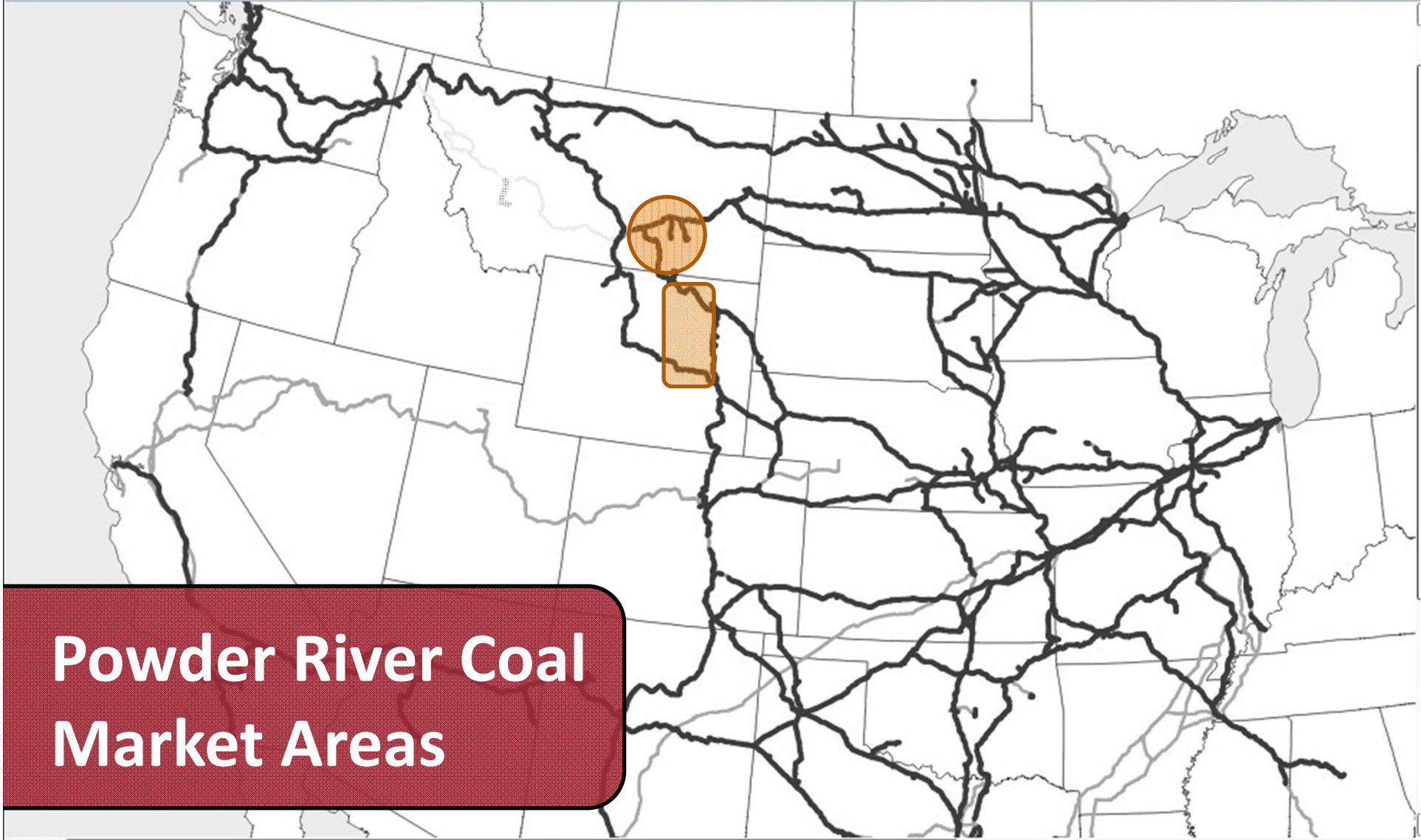


# Montana's Energy Transportation Systems

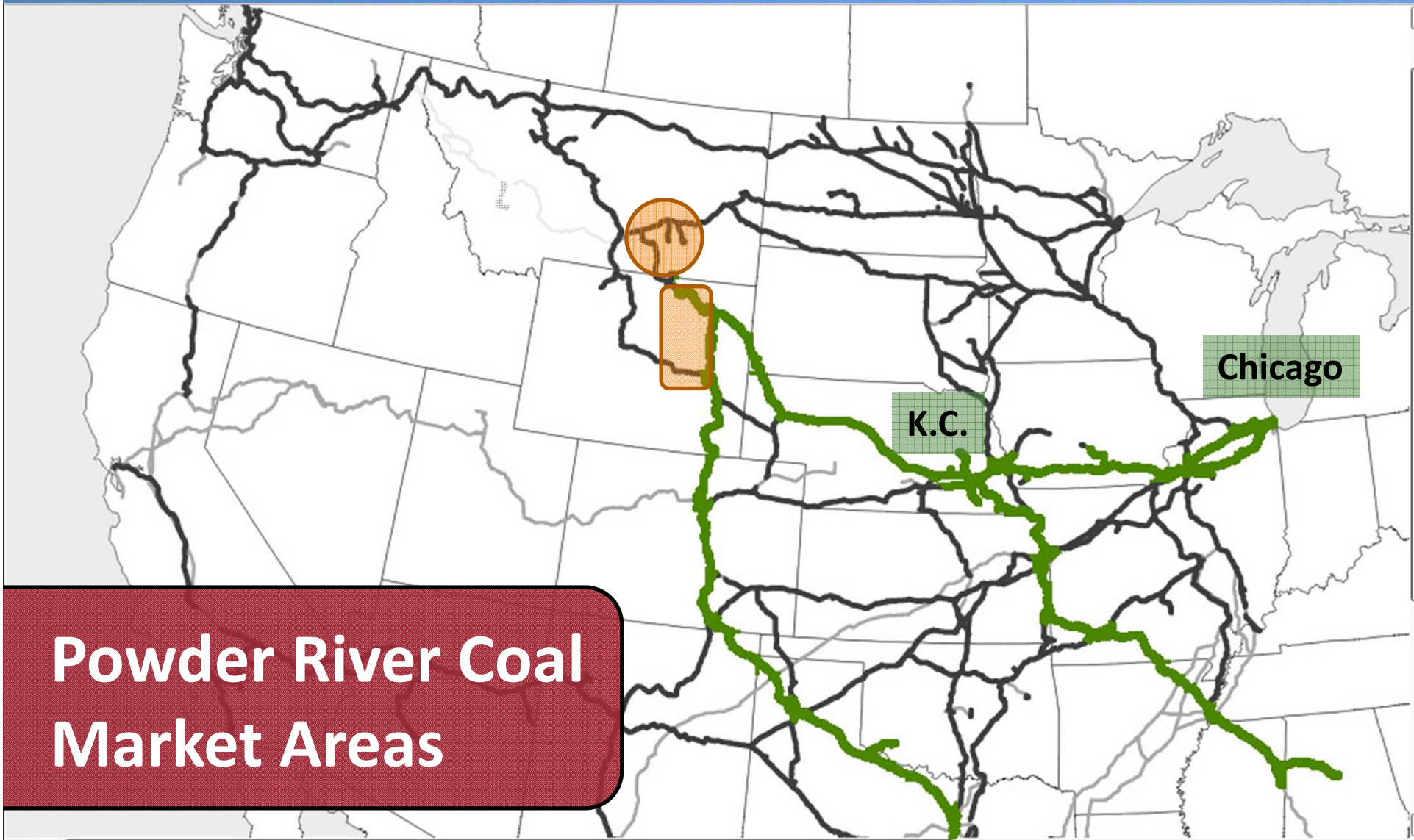


# Coal Reserves and Production

	Reserves (Billions of Tons)	
<b>Montana</b>	<b>119.0</b>	
<b>Wyoming</b>	<b>61.0</b>	



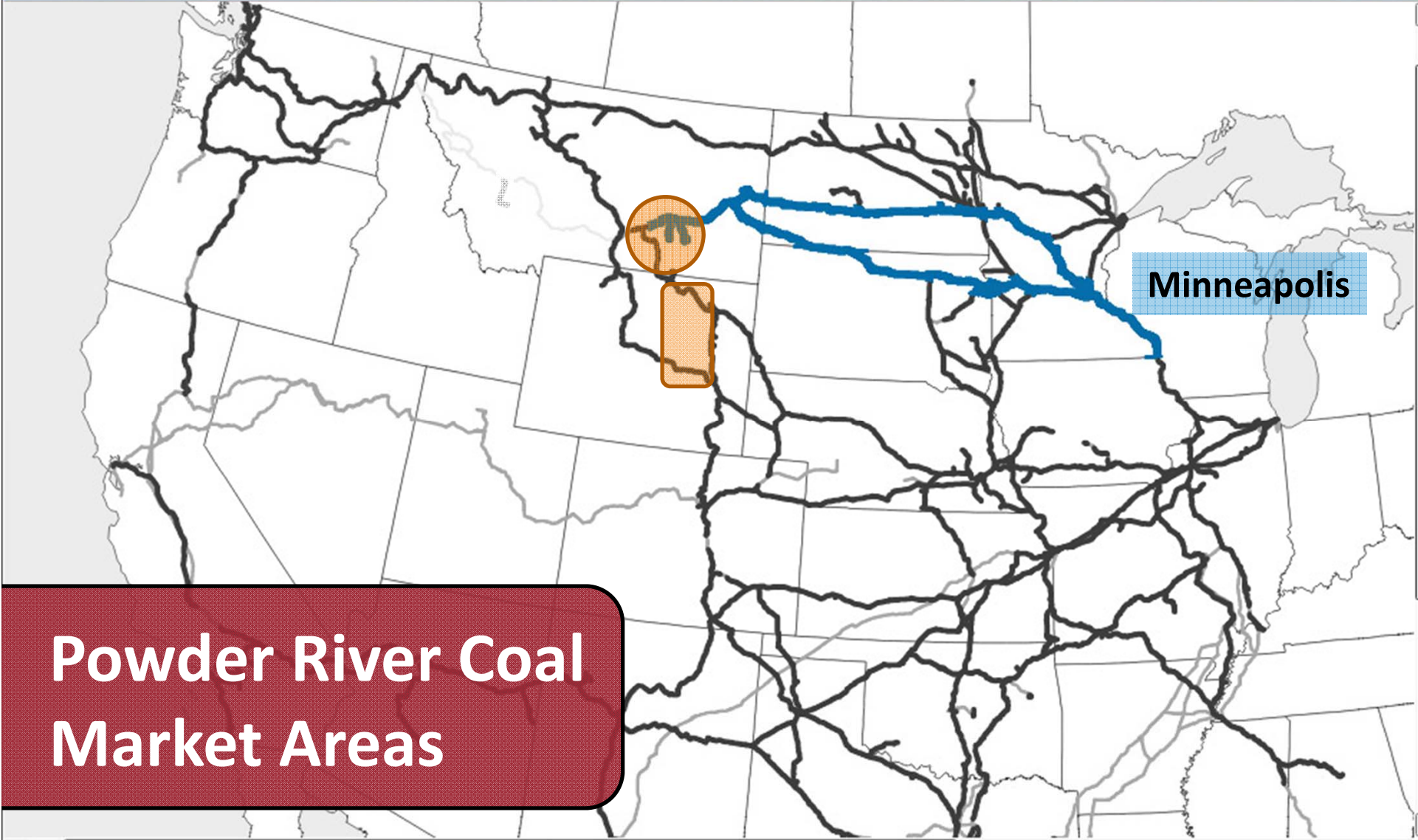
# Powder River Coal Market Areas



Chicago

K.C.

Houston

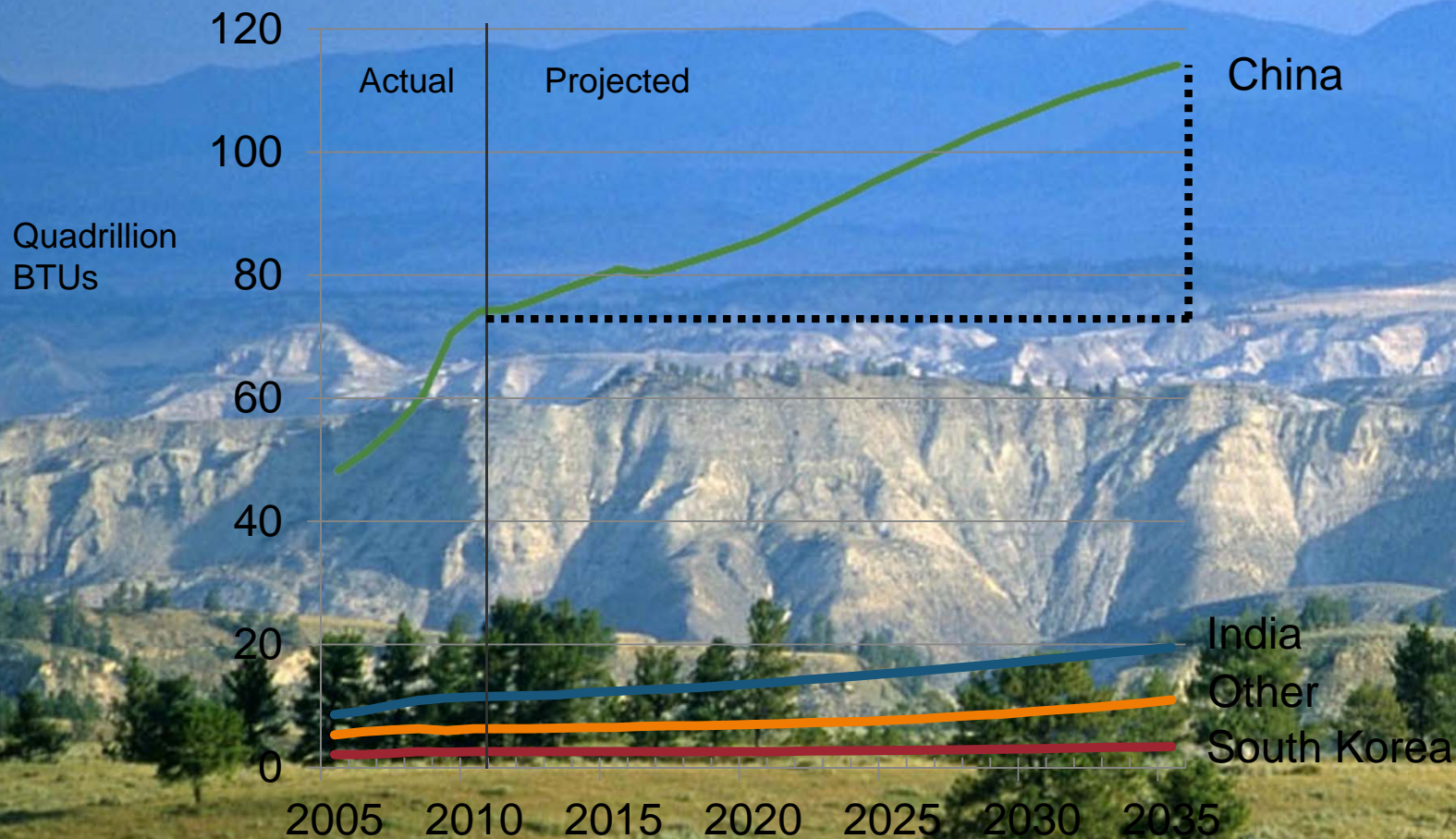


Minneapolis

**Powder River Coal  
Market Areas**



# Actual and Projected Asian Coal Consumption



Sources: History: U.S. Energy Information Administration, International Energy Statistics database

Vancouver

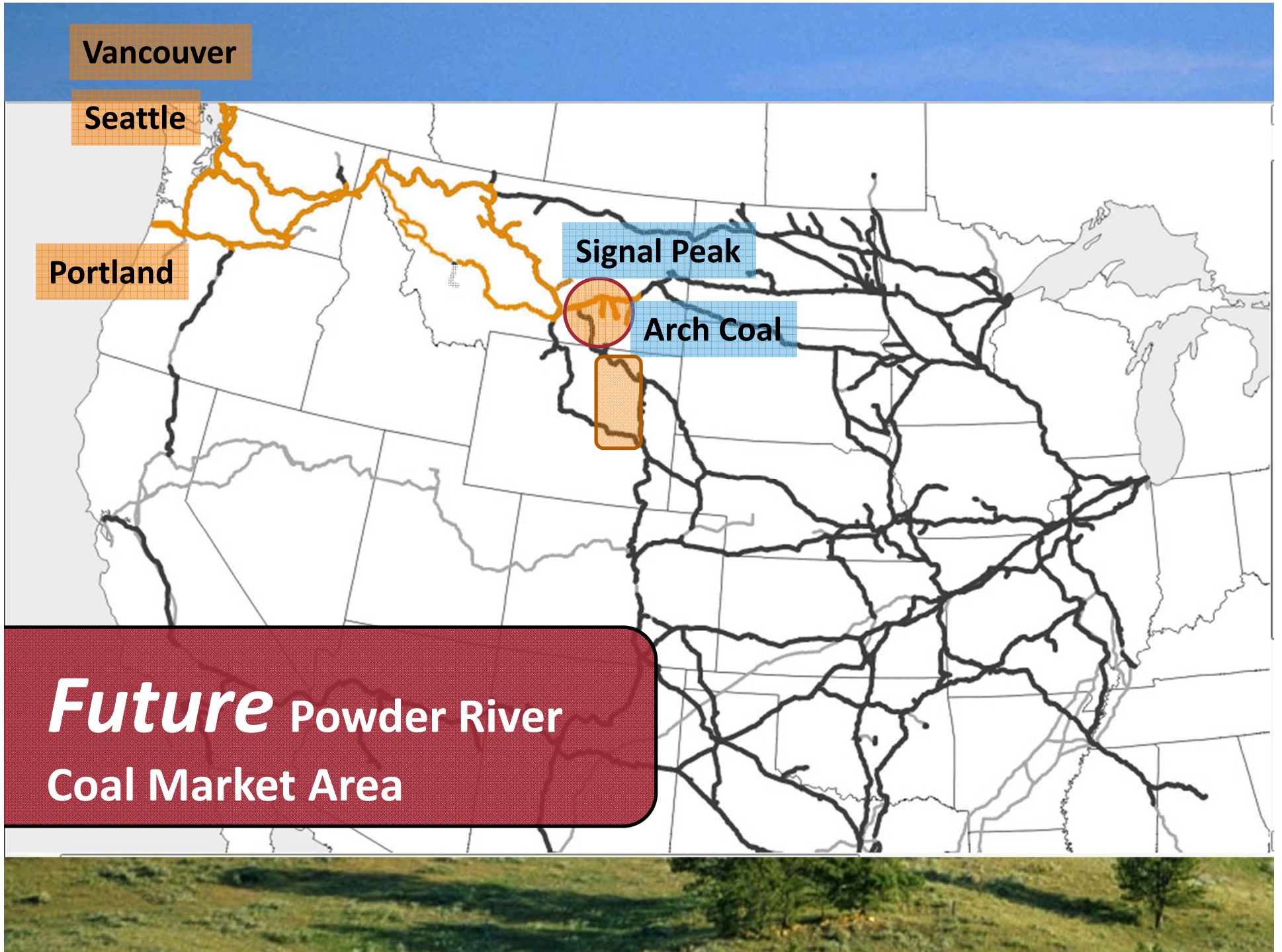
Seattle

Portland

Signal Peak

Arch Coal

*Future* Powder River  
Coal Market Area



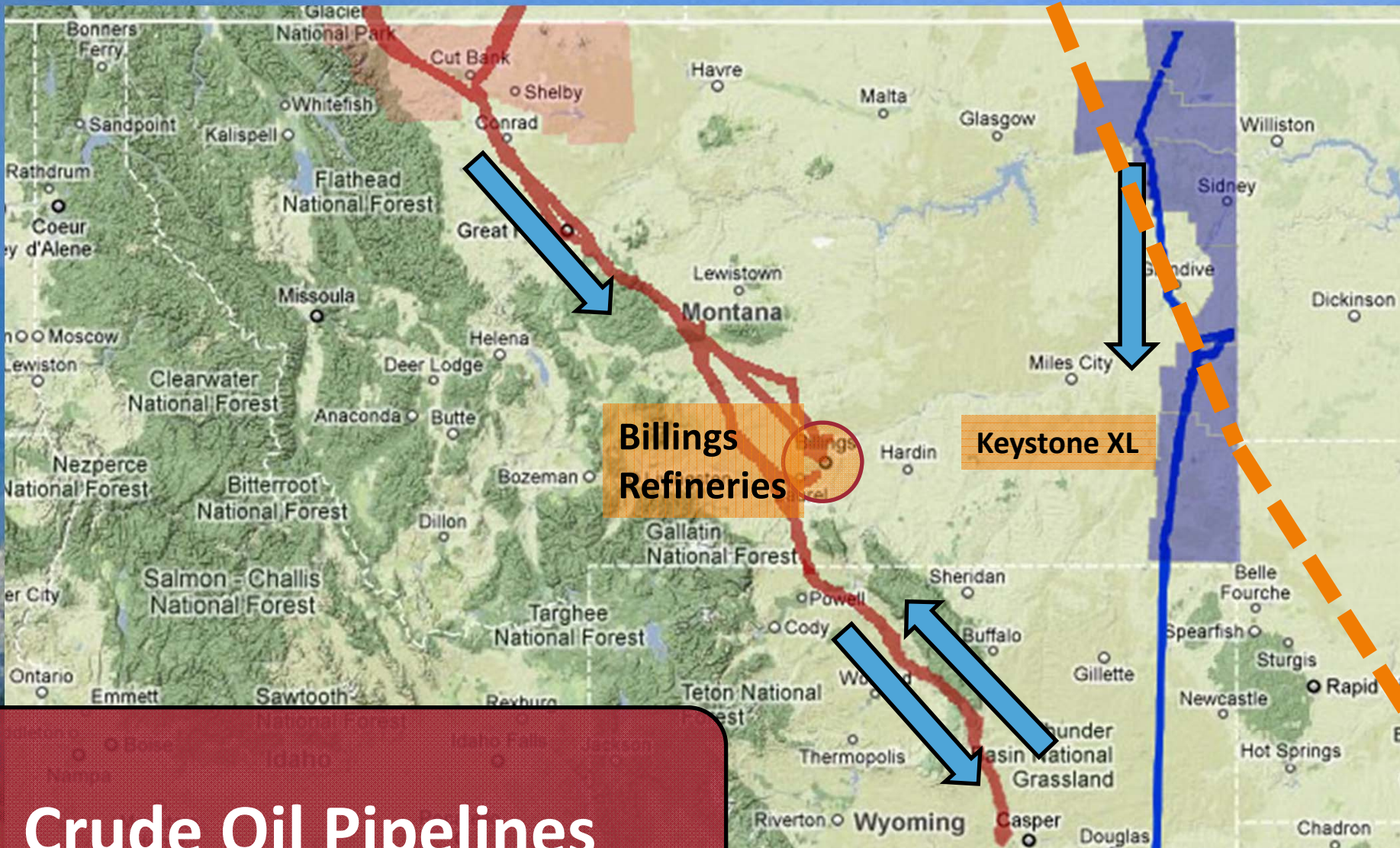


# Montana Crude Oil, 2010

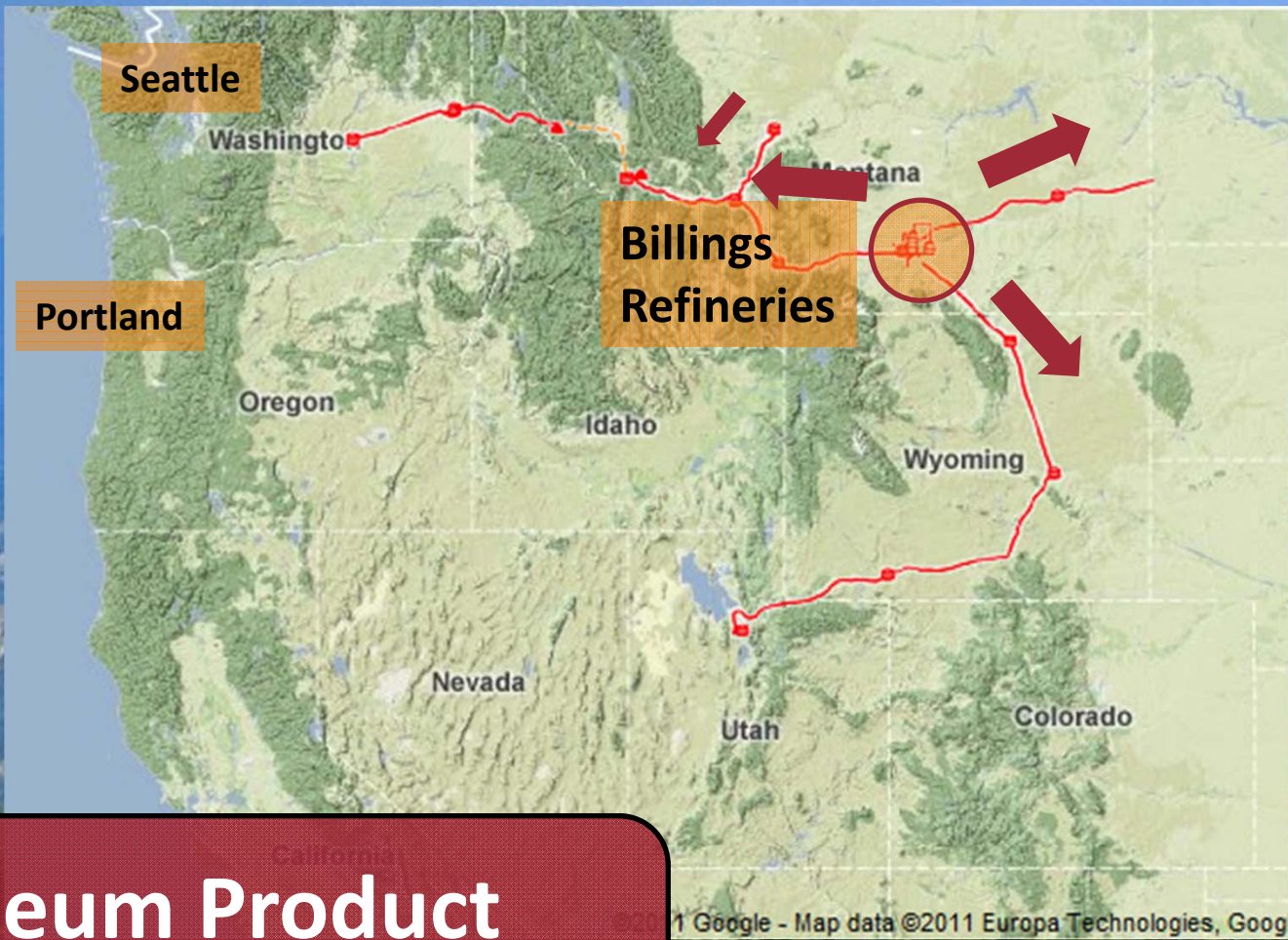
	Barrels

Source: Montana Oil and Gas Conservation Division.

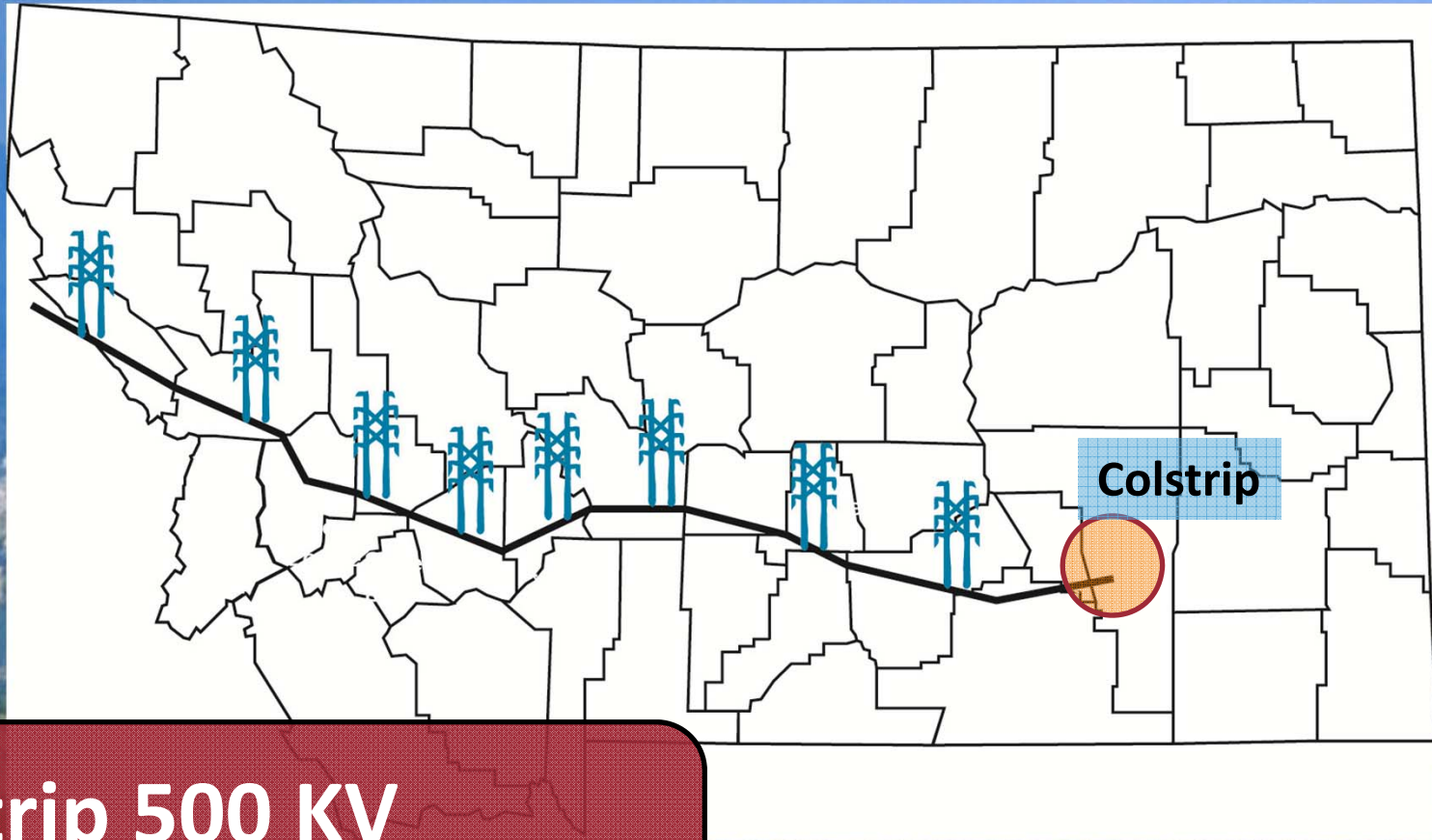
Edmonton



# Crude Oil Pipelines



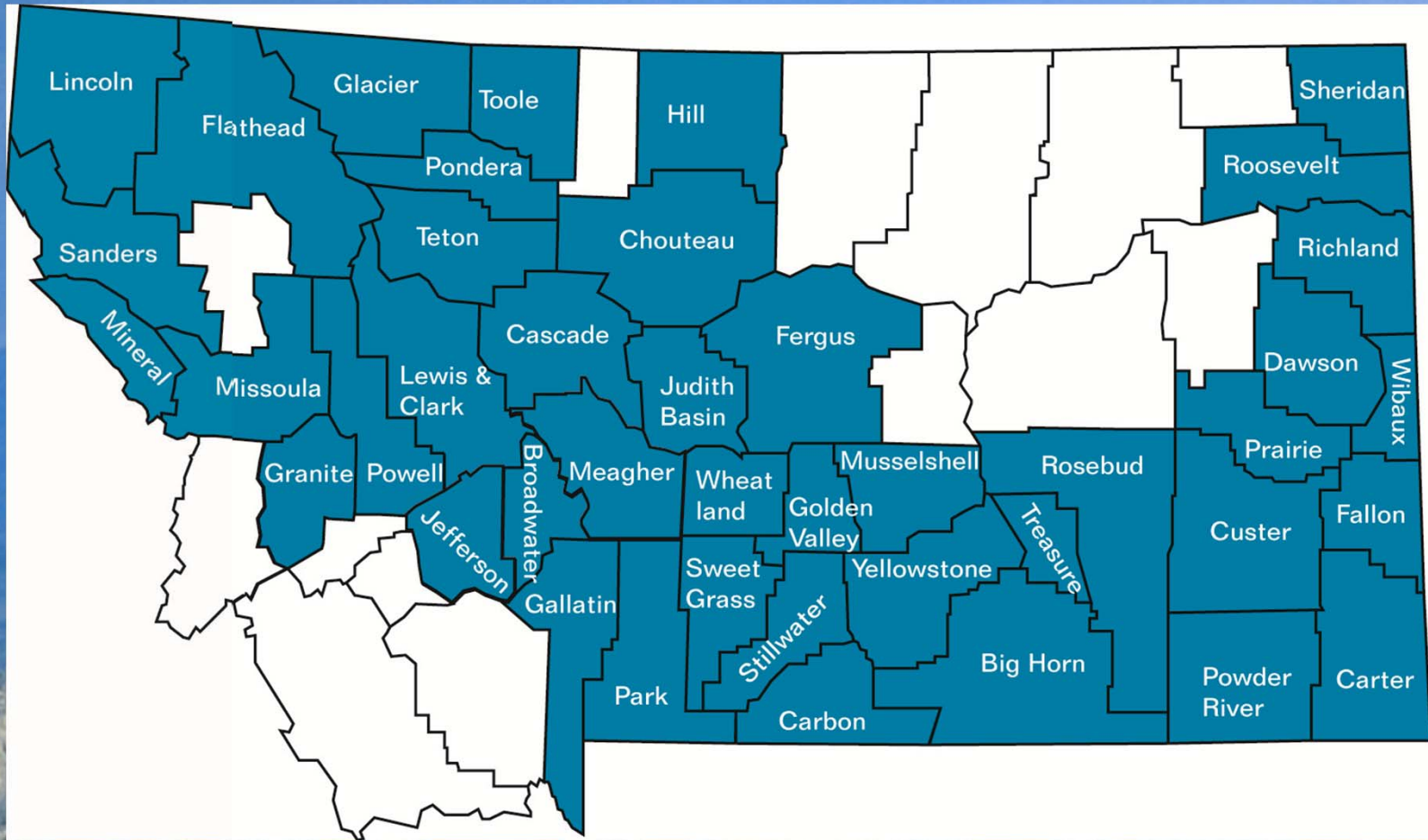
# Petroleum Product Pipeline



**Colstrip 500 KV  
Transmission Line**

## Transmission Line Property Taxes to Counties

County	Estimated Taxes
Rosebud	\$492,000
Treasure	\$952,000
Big Horn	\$241,000
<b>Yellowstone</b>	<b>\$1,467,000</b>
Golden Valley	\$372,000
Stillwater	\$373,000
Wheatland	\$615,000
Meagher	\$865,000
Broadwater	\$563,000
Jefferson	\$401,000
Powell	\$322,000
Granite	\$401,000
<b>Missoula</b>	<b>\$568,000</b>
Mineral	\$784,000
<b>TOTAL</b>	<b>\$8,417,000</b>



## Montana's Energy Transportation Systems

A landscape photograph showing a range of mountains under a clear blue sky. The foreground consists of a grassy field with several green trees. The middle ground features a series of rolling hills and valleys, with some rocky outcrops. The background shows a range of blue mountains. The word "Questions?" is written in white, bold, sans-serif font across the center of the image.

Questions?