



# Local Outlook: Lewis & Clark County

By Paul E. Polzin

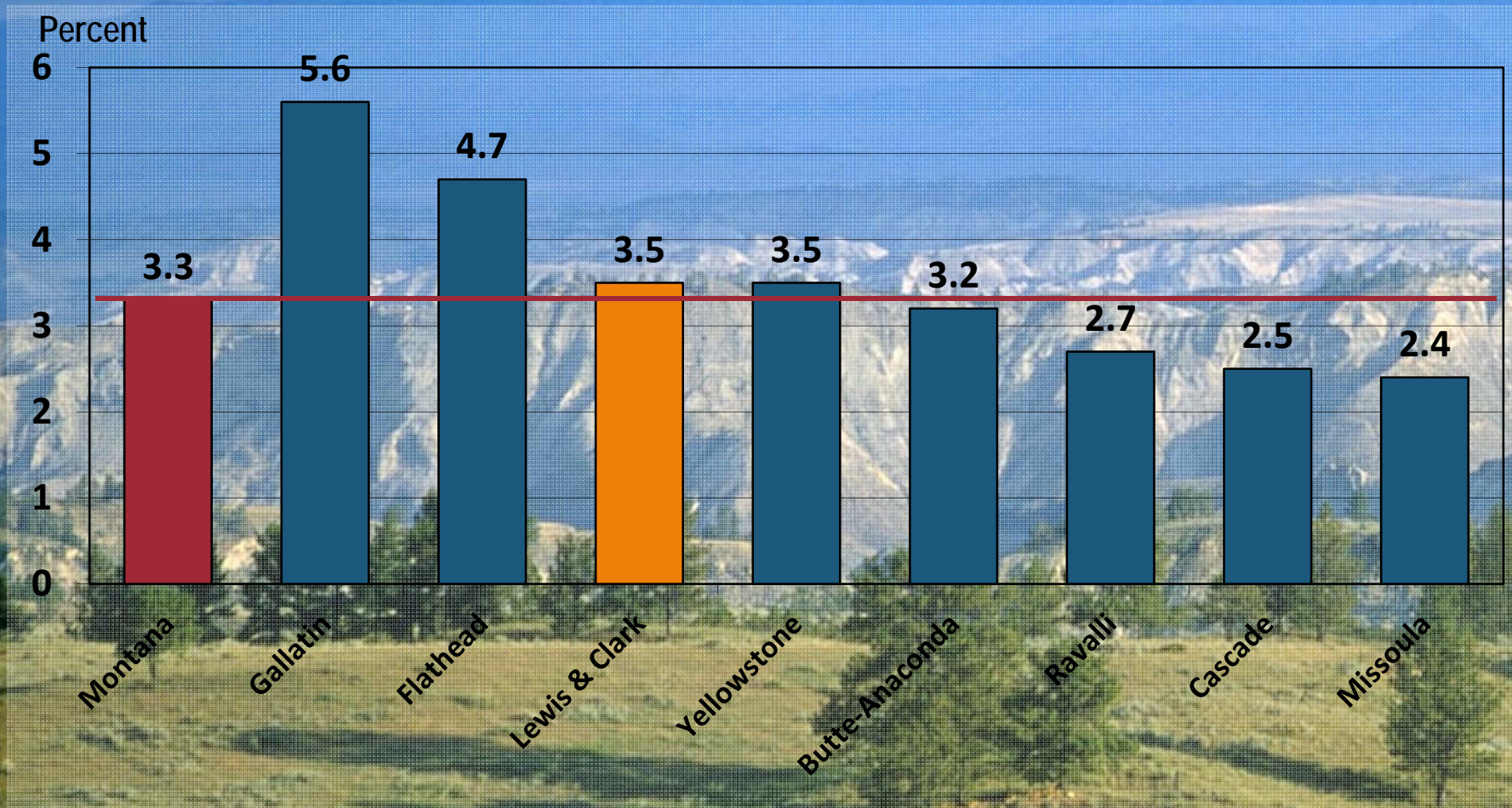
Director Emeritus

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





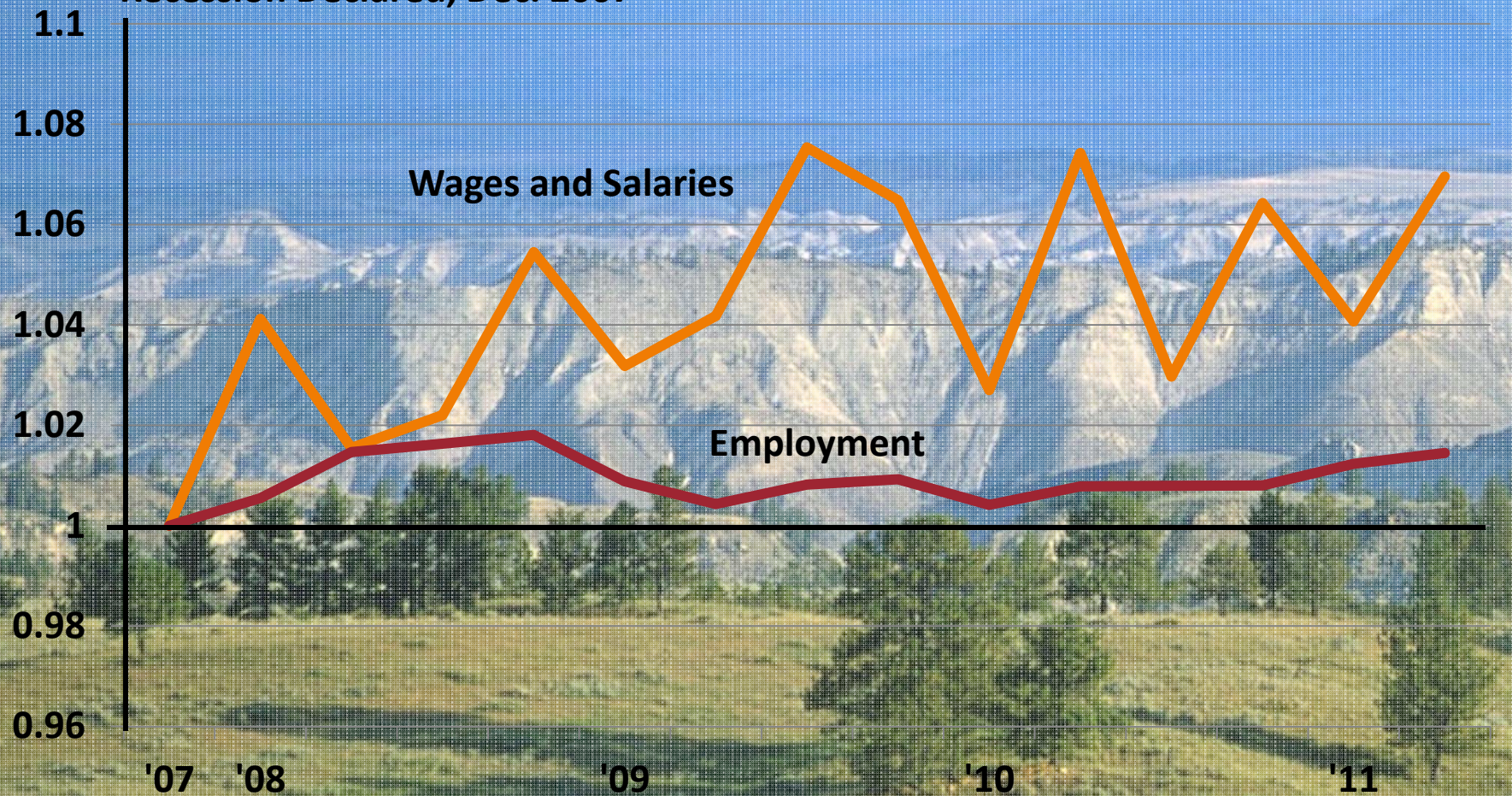
# Recession Scorecard

	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, Lewis & Clark County

Recession Declared, Dec. 2007





# Lewis & Clark County's Economic Base 2009-2011

- Other 9%
- Manufacturing 5%
- Trade Center 16%
- Federal Government 24%
- State Government 45%

Stable  
Slower Growth  
Stable at Best  
Pay Freeze, No Layoffs

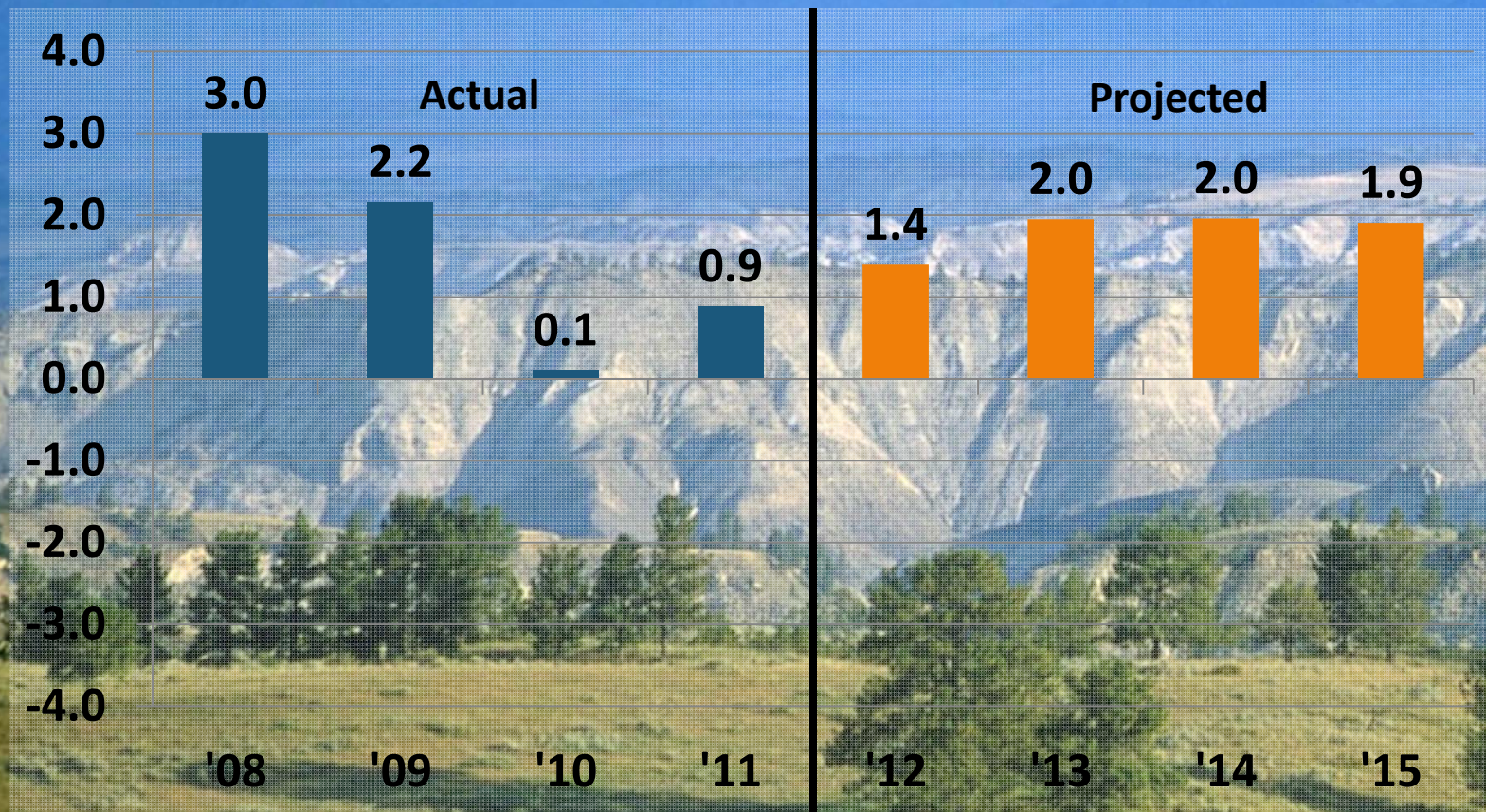
Construction

Not Before 2013



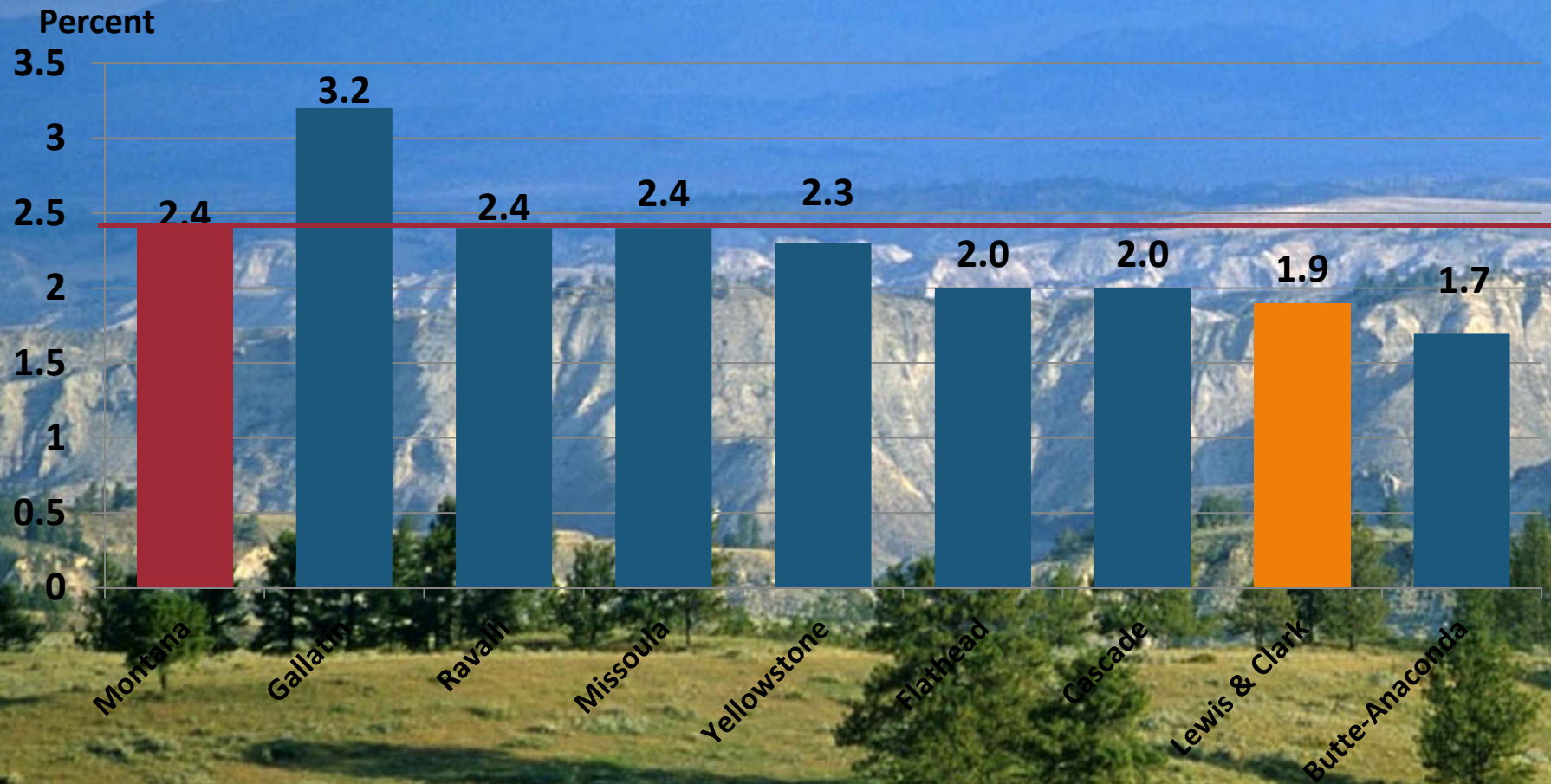
# Actual and Projected Change in Nonfarm Earnings, Lewis & Clark County, 2008-2015

Percent





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





# Montana's Energy Transportation Systems

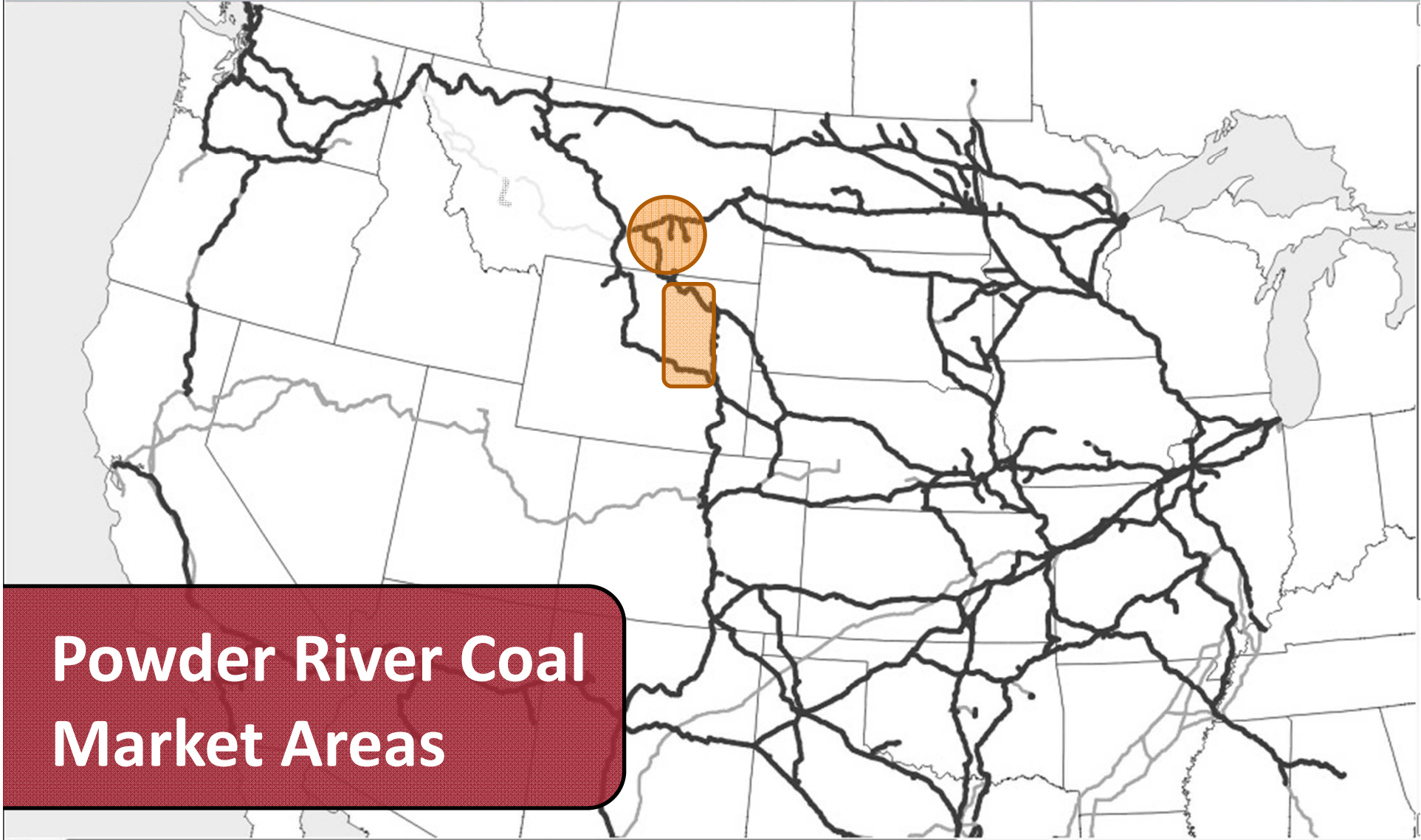




# Coal Reserves and Production

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



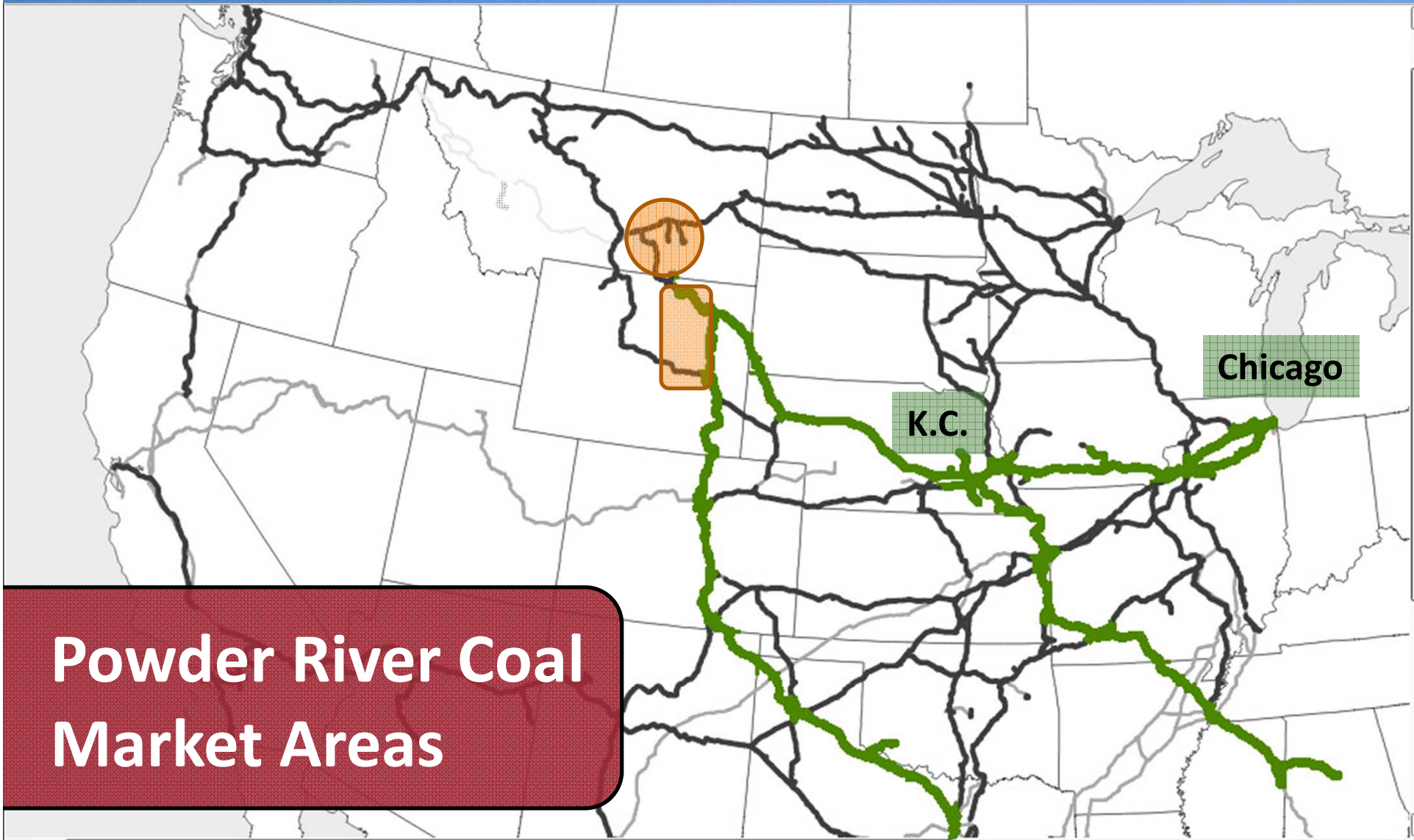


**Powder River Coal  
Market Areas**





# Powder River Coal Market Areas

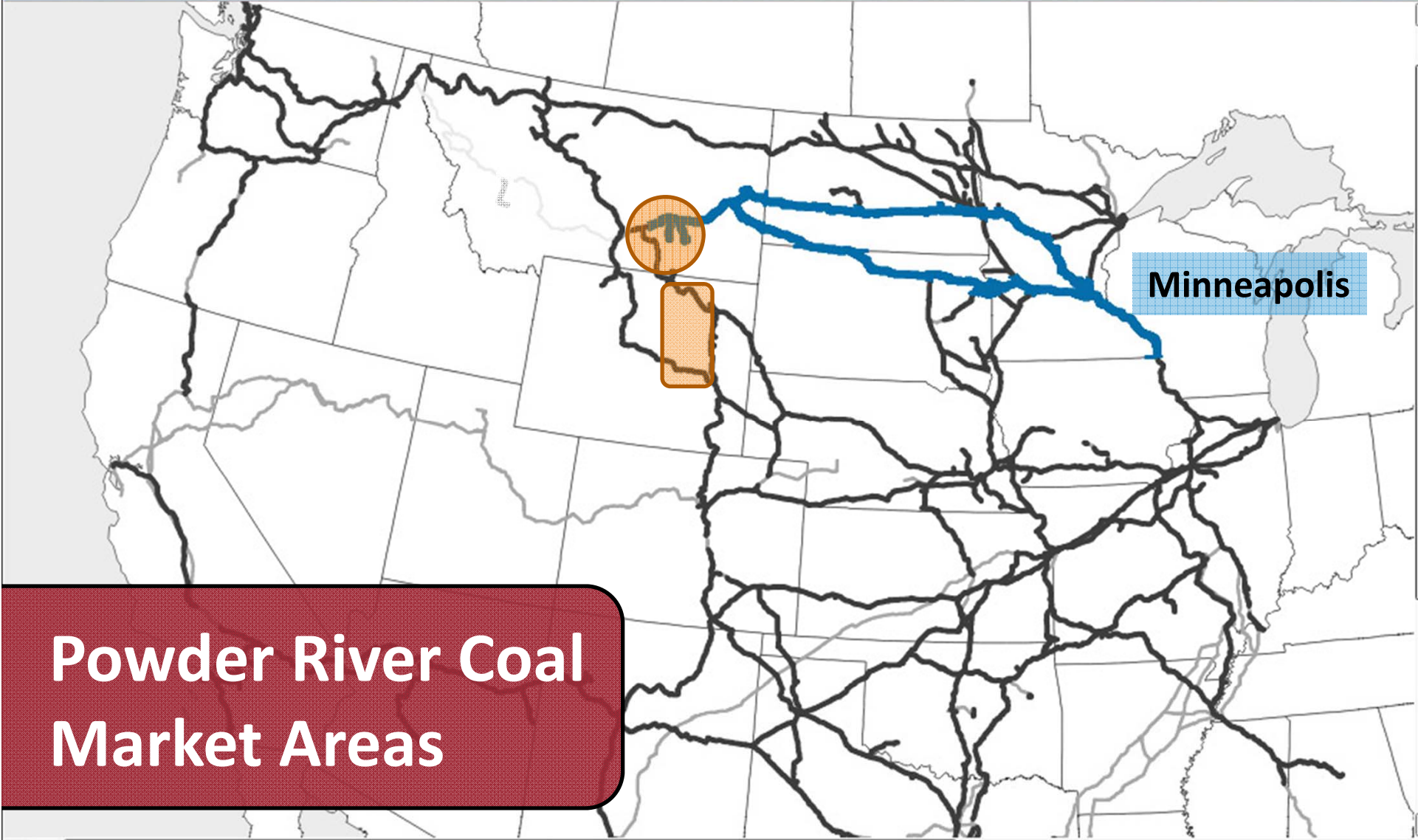


Chicago

K.C.

Houston





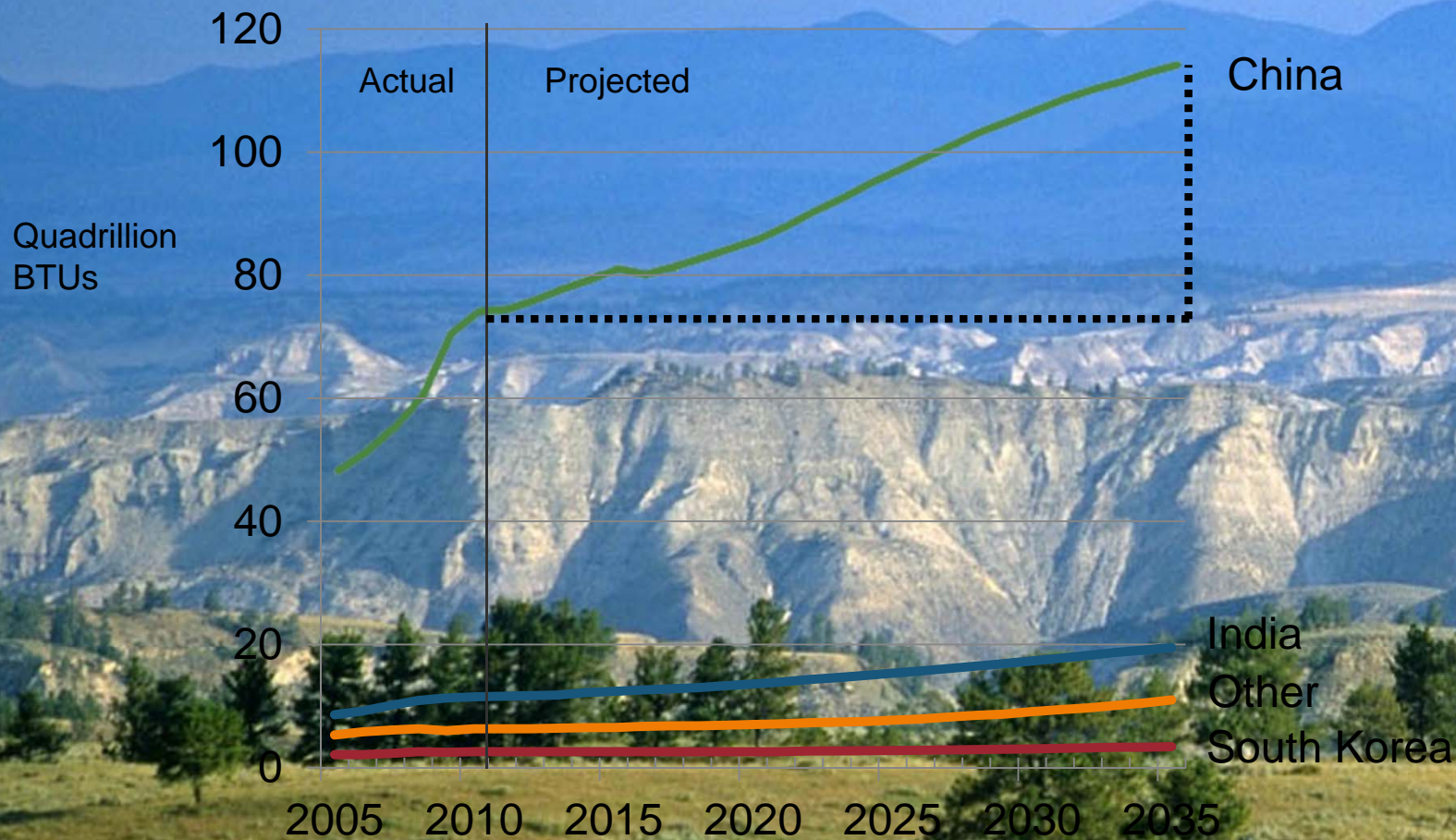
Minneapolis

**Powder River Coal  
Market Areas**





# Actual and Projected Asian Coal Consumption





Vancouver

Seattle

Portland

Signal Peak

Arch Coal

*Future* Powder River  
Coal Market Area





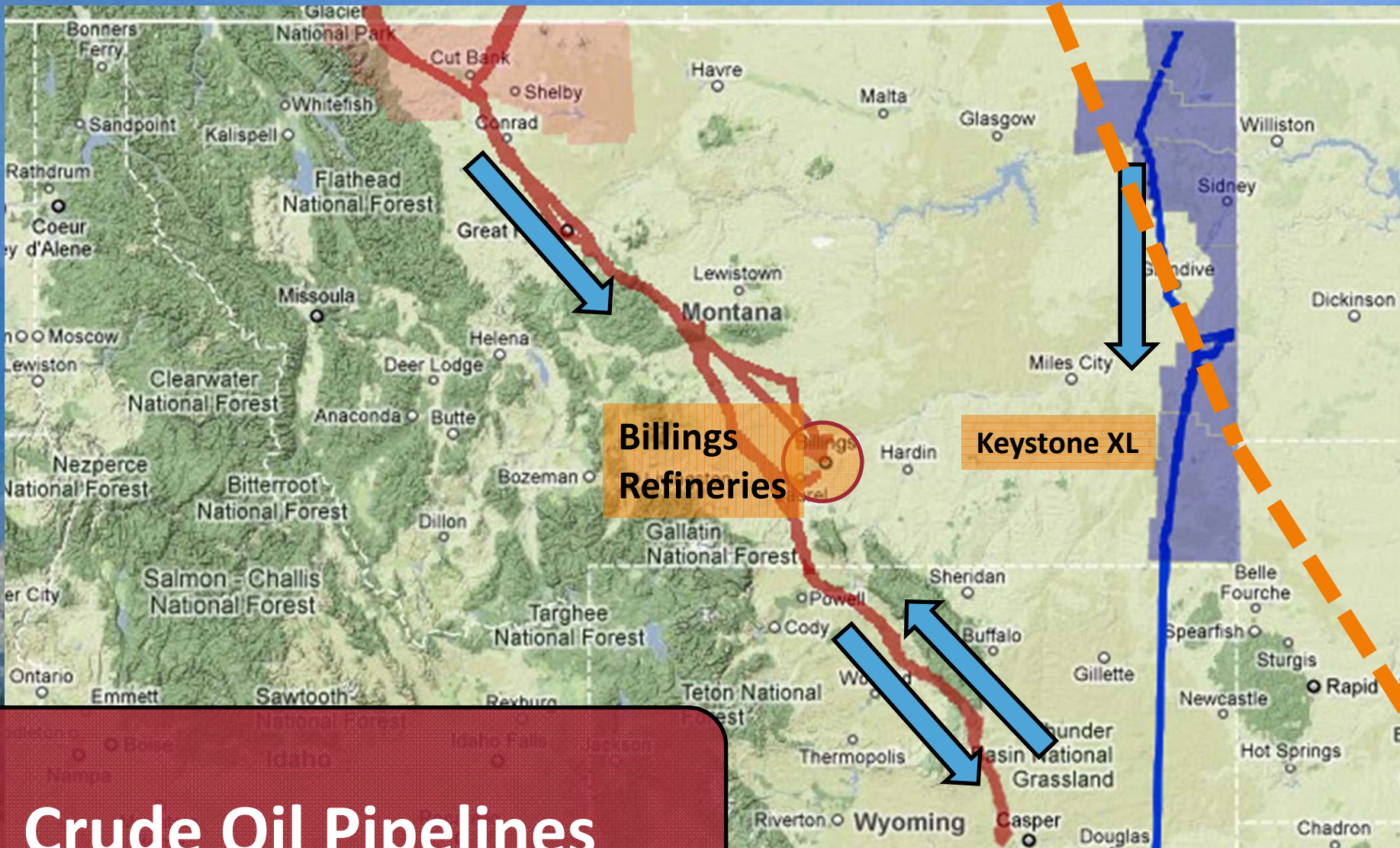
# Montana Crude Oil, 2010

	Barrels

Source: Montana Oil and Gas Conservation Division.



Edmonton

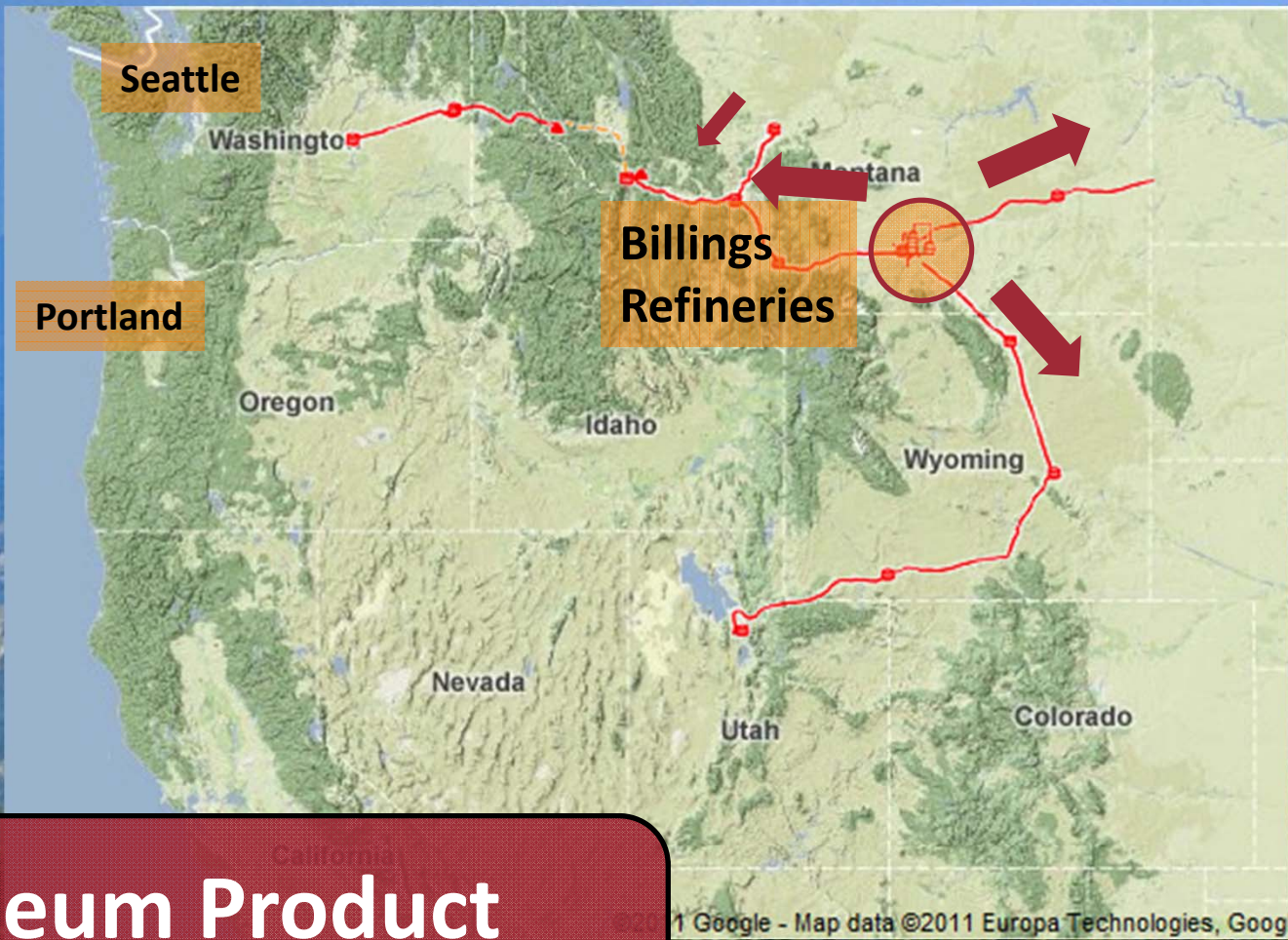


Billings Refineries

Keystone XL

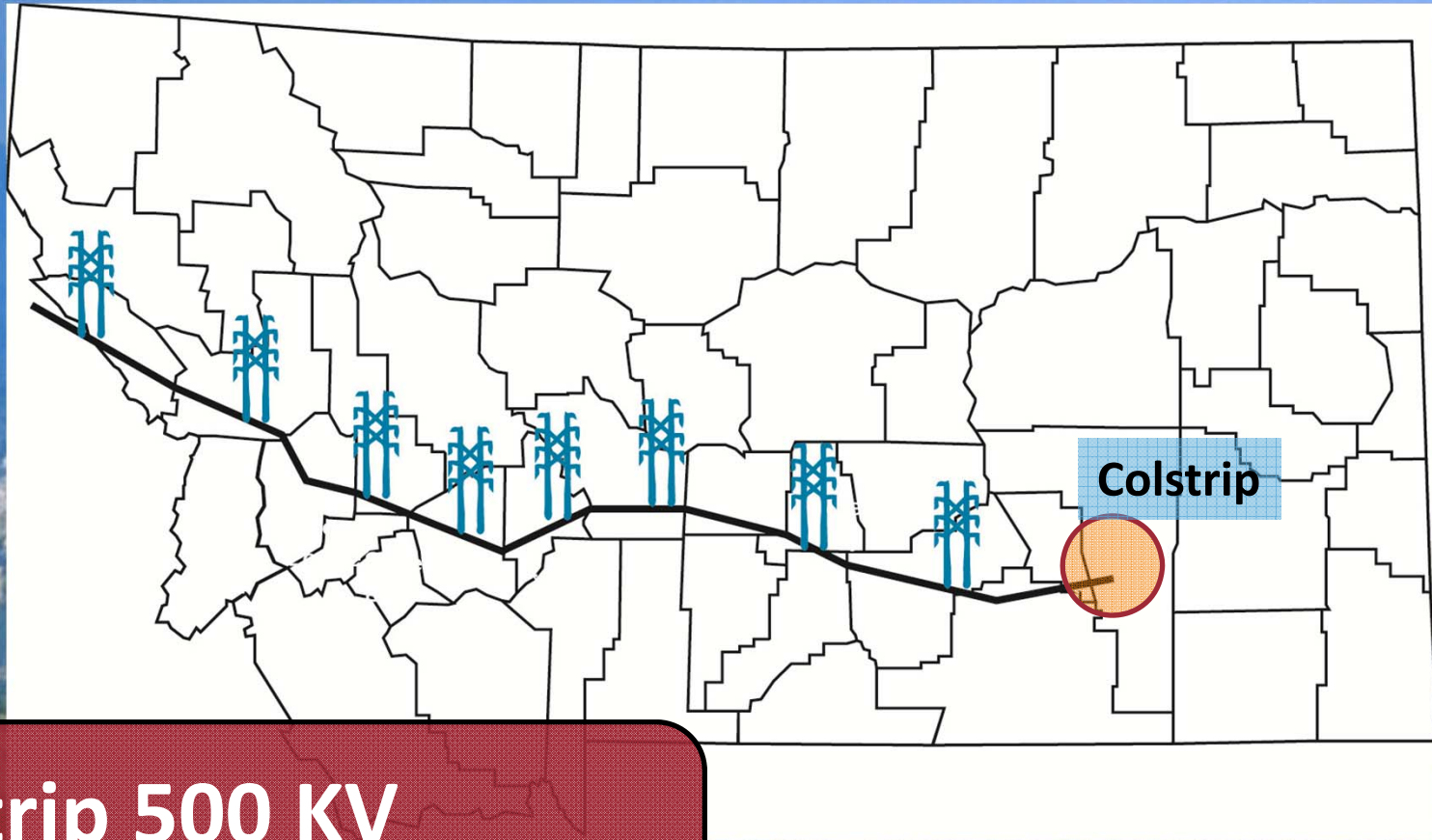
Crude Oil Pipelines





# 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>







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 long, low mountain range stretching across the horizon. The word "Questions?" is written in a large, white, sans-serif font in the center of the image.

Questions?