

Nebraska: Home to 19,004 Clean Energy Jobs

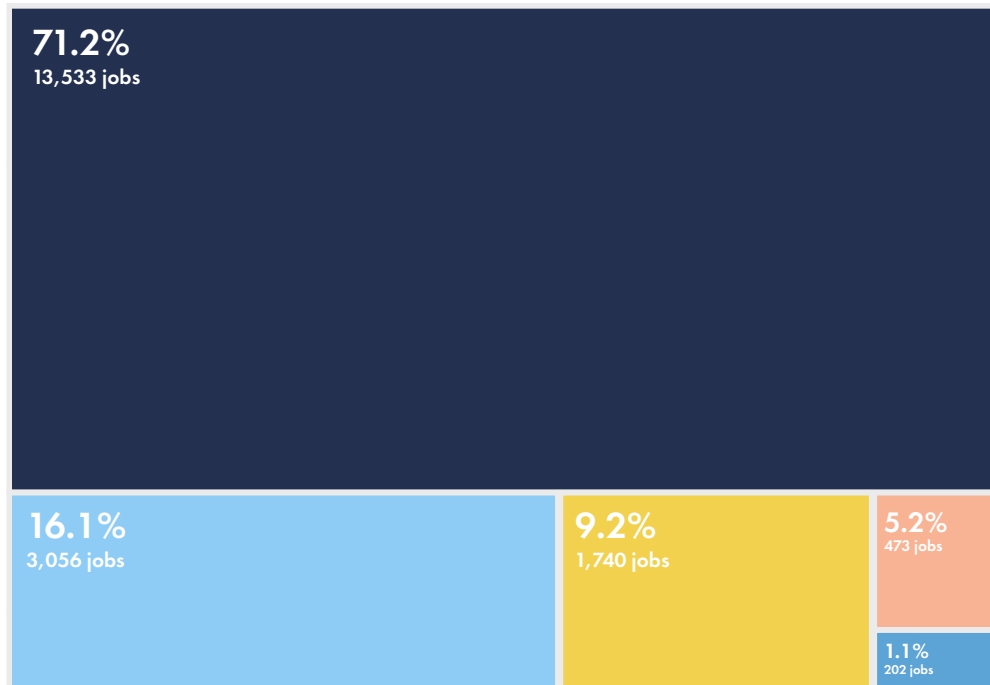
NEBRASKA ADDS 600 JOBS IN 2018; EVEN HIGHER GROWTH EXPECTED THIS YEAR

Clean energy is a major employer in Nebraska with 19,004 jobs. Employment in the industry grew 3.5 percent in 2018, an addition of 635 jobs. Energy efficiency jobs remain the largest individual sector in terms of Nebraska clean energy employment with more than 70 percent of all clean energy jobs across the state. Nebraska clean energy employers have an optimistic outlook for job growth this year. Employers in Nebraska project a 7.7 percent growth in jobs, with about 1,500 jobs expected to be added in 2019.

SECTOR BREAKDOWN

Fig. 1:
Clean Energy Technology Sectors, 2018

- Energy Efficiency
- Renewable Energy Generation
- Advanced Transportation
- Advanced Grid
- Clean Fuels



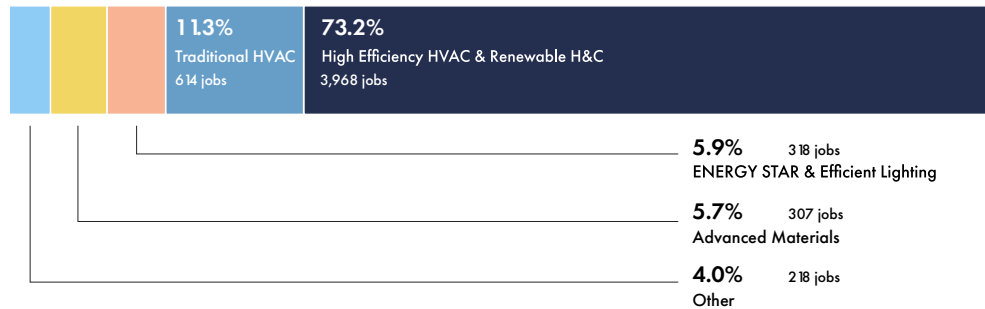
1. Unless otherwise stated, all data is based on the 2019 USEER. Energy Futures Initiative. (2019). The U.S. Energy Employment Report. Washington, DC. www.usenergyjobs.org. The Data provided relies on thousands of data points provided via survey. EFI, NASEO and BWRP have made every effort to supply current and accurate information but assume no responsibility or liability for any decisions based upon the information presented. For more information on the survey methodology see cleanjobsmidwest.com/about.

ENERGY EFFICIENCY IS NEBRASKA'S DOMINANT CLEAN ENERGY SECTOR

More Nebraskans work in energy efficiency -- 13,533 -- than in any other sector in the clean energy industry. In 2018, Nebraska energy efficiency jobs grew by 509, good for a 3.9 percent growth rate.

Energy efficiency workers manufacture ENERGY STAR-rated appliances and install efficient lighting systems; tweak traditional heating, ventilation, and air conditioning (HVAC) systems; design high-efficiency HVAC units, and handle advanced building materials.

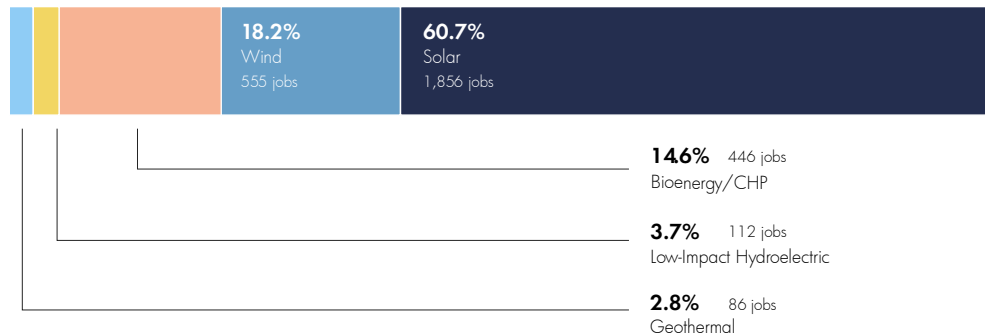
Fig. 2:
Energy Efficiency Subsectors,
2018



PICKS UP, SOLAR DIMS AS OVERALL RENEWABLE ENERGY JOBS FALL

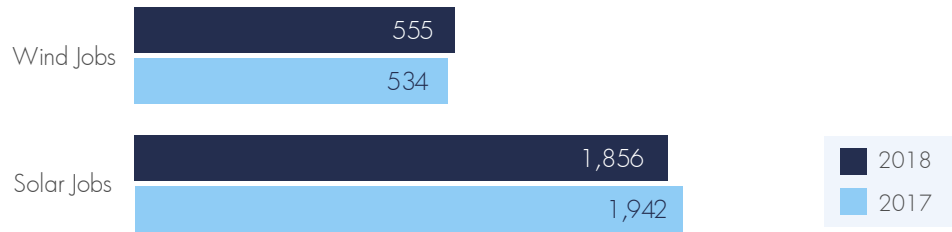
Renewable energy employs 3,056 people in Nebraska. That's about 100 jobs fewer than in 2017, or a decline of 3.5 percent. This contraction of Nebraska's renewable energy job market contrasts with the regional trend of job gains in the sector. Still, renewable energy is the second-largest clean energy sector in the state in terms of employment.

Fig. 3:
Renewable Energy Subsectors,
2018



Looking at specific renewable energy sub-sectors, wind (555 jobs) and solar (1,856 jobs) are the two largest employers in Nebraska. Wind energy jobs in the state grew 4 percent in 2018, but solar jobs shrunk 4 percent, a loss of 86 jobs and essentially in-line with a national solar jobs market that fell 4.5 percent.

Fig. 4:
Wind and Solar Jobs, 2018 and
2017 Comparison



ADVANCED TRANSPORTATION JOBS REV UP

Advanced transportation is Nebraska’s third-largest clean energy sector in terms of jobs, employing 1,740 people. That’s 215, or 14.1 percent, more than in 2017 when the state’s advanced transportation sector actually shed jobs. Jobs relating to plug-in hybrid vehicles had a particularly strong year, surging 28 percent to employ 363 people, 80 more than the previous year. EV jobs, meanwhile, grew by 20 percent to 466 jobs.

ENERGY STORAGE JOBS LEAD THE ADVANCED GRID SECTOR

Advanced grid jobs employ 473 Nebraskans. These jobs grew 4.3 percent in 2018. Energy storage is the sector’s largest employer in the state with 170 jobs. The advanced grid sector also includes jobs in smart grid, microgrid, and other grid modernization work.

CLEAN FUELS JOBS HOLD STEADY

202 Nebraskans work in clean fuels jobs, a 2 percent increase year-over-year. The clean fuels sector encompasses non-corn ethanol, non-woody biomass, and other technologies not yet in wide commercial production, including algal biofuel, syngas, bioheat blends, landfill gas, and advanced biofuels.

Fig. 5:
Top 3 MSAs in Clean Energy
Employment, 2018

| Metro Area (MSA) | Total Clean Energy Employment | Renewable Energy Employment | Energy Efficiency Employment |
|---------------------------------|-------------------------------|-----------------------------|------------------------------|
| Omaha-Council Bluffs, NE-IA MSA | 7,589 | 1,276 | 5,354 |
| Lincoln, NE MSA | 3,152 | 449 | 2,294 |
| Sioux City, IA-NE-SD MSA | 146 | 27 | 100 |

2. U.S. Bureau of Labor Statistics Local Area Unemployment Statistics, 2018 Preliminary data
3. 2019 US Energy and Employment Report. This figure does not include gas station workers

CLEAN ENERGY INDUSTRY OUTLOOK

Clean energy jobs in Nebraska constitute 1.9 percent of all jobs across the entire state. While the state’s overall labor market contracted 1.4 percent in 2018, jobs in Nebraska’s clean energy industry actually grew 3.5 percent.

Looking toward the future, clean energy employers in Nebraska have slightly higher hiring projections in 2019 (7.7 percent growth) than the regional average (7 percent). However, employers reported difficulty hiring -- nearly 89 percent of the Nebraska clean energy employers surveyed reported that it was “somewhat” or “very” difficult to hire workers, higher than the previous year

COMPARING CLEAN ENERGY JOBS TO FOSSIL FUEL JOBS

In 2018, 2,857 Nebraskans worked in fossil fuel energy jobs in industries like coal, natural gas, and oil. While significant, it is only 15 percent of the total number of people working in clean energy in the state. Electric power generation jobs using fossil fuels employ 1,110 people. Renewable energy generation, meanwhile, employs more than 3,000.

VALUE CHAIN

Clean energy jobs can be categorized by the role they play in the value chain. This report divides the clean energy jobs value chain into the following categories: agriculture, utility, construction, manufacturing, trade, professional service, and other service jobs. Each category captures jobs from multiple different clean energy sectors. For example, construction jobs can include energy efficiency jobs and renewable energy jobs.

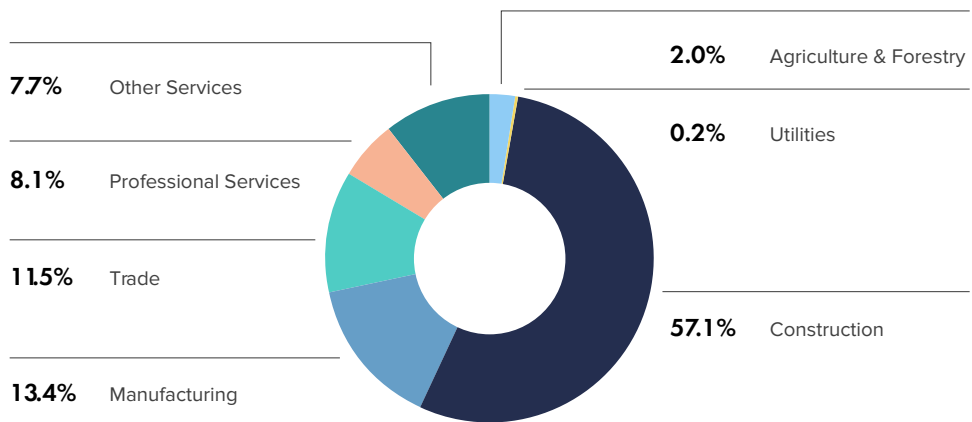


Fig. 6: Clean Energy Jobs Value Chain, 2018

When Nebraska clean energy jobs are broken down by their placement in the value chain, construction makes up 57 percent of the jobs, while manufacturing represents 13 percent.

4. 2018 Bureau of Labor Statistics Current Population Survey (CPS) <https://www.bls.gov/cps/demographics.htm>

DEMOGRAPHICS

In Nebraska, 9.6 percent of the state's clean energy workers are veterans. By comparison, veterans make up 6 percent of the national labor force. The large ratio of veterans transitioning to clean energy jobs is partially the result of the U.S. Department of Defense's long-standing commitment to investing in renewable energy, energy efficiency and training programs that prepare veterans for private-sector employment in industries like solar.

Small businesses drive the state's clean energy sector – 70.9 percent of Nebraska's clean energy businesses employ fewer than 20 individuals.

SUMMARY

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With 19,000 jobs and counting, the clean energy industry is a significant employer in Nebraska. Even as jobs in the state overall are decreasing, jobs in Nebraska's clean energy industry are growing at a relatively healthy 3.5 percent clip. Clean energy employers in Nebraska are bullish when it comes to ongoing hiring: they predict a 7.7 percent increase in clean energy jobs in 2019, higher than the regional average.

The data and analyses presented in this report by Clean Energy Trust and Environmental Entrepreneurs are based on data collected for the 2019 U.S. Energy Employment Report (2019 USEER), produced by the Energy Futures Initiative (EFI) in partnership with the National Association of State Energy Officials (NASEO) and collected and analyzed by BW Research Partnership (BWRP).

2019 CLEAN JOBS MIDWEST

