

ALASKA ECONOMIC

TRENDS



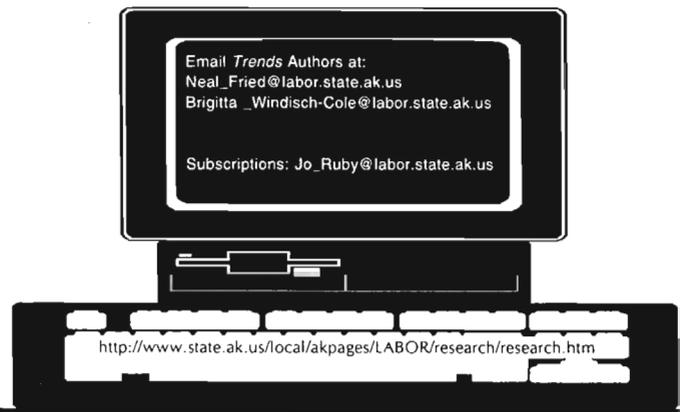
LABOR MARKET
POSITIVE DESPITE
RESTRAINED GROWTH

August 1997

ALASKA'S LARGEST PRIVATE EMPLOYERS IN 1996

ALASKA DEPARTMENT OF LABOR • TONY KNOWLES, GOVERNOR

ALASKA ECONOMIC TRENDS



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**Alaska
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Alaska's Largest Private Employers in 1996

By Neal Fried and Brigitta Windisch-Cole

For the sixth straight year, Carr Gottstein Foods, a grocery chain, heads the list of the state's largest private sector employers. (See Tables 1 and 3.) In 1996, Carr's provided an average of 3,299 jobs—the largest workforce ever recorded by one firm since the inception of this list in 1985. All other firms had at least a thousand fewer employees. The second and third largest employers were Providence Alaska Medical Center and Fred Meyer respectively—a slightly different lineup from last year. ARCO Alaska, which held the number two spot in 1995, slipped to fourth place as it continued to downsize.

Ten largest firms remain unchanged

The 10 largest employers in 1995 repeated at the top of the list in 1996, although there was a bit of shuffling among their ranks. Over the years, the top 10 list has remained relatively stable; six of the current top 10 employers were also in this group a decade ago. (See Table 3.) Some of the changes reflect the evolution of Alaska's economy. In 1986, four oil industry firms made the top 10 list compared to three in 1996. Most of the oil industry firms' rankings have slowly migrated down the list.

Seven newcomers join the list

Although the Trends 100 list is relatively durable, seven new players were added this year. (See Table 4.) The newcomers represent a variety of industries and many reflect broad economic trends. For example, three of the new firms are tourism relat-

ed. They include Westours Motorcoaches, the Sheraton Anchorage Hotel and Sky Chefs, which prepares airline meals. Eagle Hardware and Garden is one of the recent national retail arrivals on the scene. Another newcomer, The Industrial Company, became one of the state's largest employers because of its work at the new Fort Knox gold mine in Fairbanks. Over the years, Norcon, an oil field service company, has moved off and on the list. In 1996, its employment numbers climbed because of contract work with utility companies. Finally, the Rural Alaska Community Action Program, a private nonprofit organization that provides a variety of services for rural Alaska, joined the cadre of Trends 100 employers.

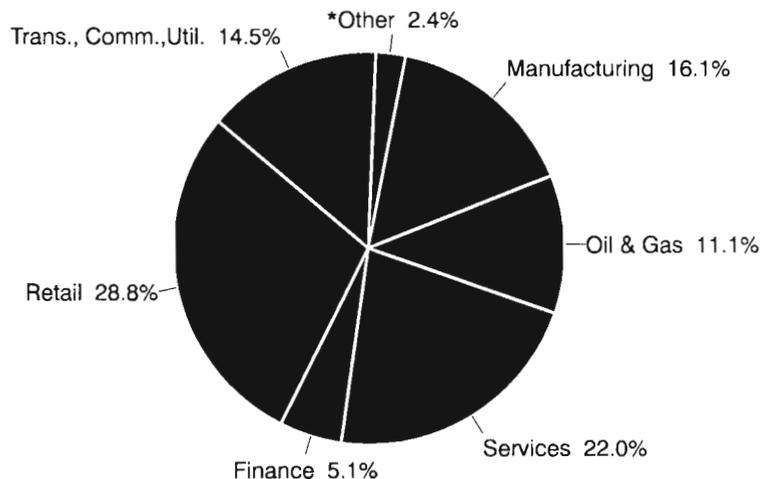
Neal Fried and Brigitta Windisch-Cole are labor economists with the Research and Analysis Section, Administrative Services Division, Alaska Department of Labor. They are located in Anchorage.

Big movers reflect changes in the economy

Many of the companies that climbed by 10 or more rankings are firms benefiting from changes in the economy. (See Table 5.) Nearly a third of

Figure • 1

Most of the Trends 100 Employees Hold Service and Retail Jobs



Source: Alaska Department of Labor, Research and Analysis Section.

*Other: Includes Hard Rock Mining, Wholesale Trade, and Construction.

Table • 1

Alaska's 100 Largest Private Employers 1996

Rank	Firm Name	Employment	Headquarters or Largest Work Site	Business Activity
1	Carr Gottstein Foods	3,299	Anchorage	Grocery
2	Providence Alaska Medical Center	2,261	Anchorage	Hospital
3	Fred Meyer	1,760	Anchorage	Grocery/General Merchandise
4	ARCO Alaska	1,572	Anchorage	Oil & Gas Production
5	Trident Seafoods	1,377	Akutan	Seafood Processing
6	Alaska Airlines	1,355	Anchorage	Air Carrier
7	Wal-Mart/Sam's Club	1,284	Anchorage	General Merchandise
8	National Bank of Alaska	1,165	Anchorage	Banking
9	VECO	1,162	Anchorage	Oil Field Services/Construction
10	BP Exploration	1,132	Anchorage	Oil & Gas Production
11	Alaska Petroleum Contractors	1,103	Anchorage	Oil Field Services
12	Fairbanks Memorial Hospital	1,012	Fairbanks	Hospital
13	Safeway Stores	982	Anchorage	Grocery
14	Alyeska Pipeline Service Company	972	Anchorage	Pipeline Transportation
15	Kmart	879	Anchorage	General Merchandise
16	Tyson Seafood Group	860	Kodiak	Seafood Processing
17	First National Bank of Anchorage	832	Anchorage	Banking
18	Federal Express	760	Anchorage	Courier Service
19	Ketchikan Pulp Mill	752	Ketchikan	Pulp & Lumber Products
20	Laidlaw Transit	714	Anchorage	Bus Charter Services
21	Alaska USA Federal Credit Union	685	Anchorage	Credit Union
22	Columbia Alaska Regional Hospital	684	Anchorage	Hospital
23	UniSea	683	Dutch Harbor	Seafood Processing
24	Union Oil of California (Unocal)	682	Anchorage	Petroleum Products
25	Yukon Kuskokwim Health Corporation	669	Bethel	Health Care
26	Alaska Commercial Company	655	Anchorage	Grocery/General Merchandise
27	Sears Roebuck	620	Anchorage	General Merchandise
28	ERA Aviation	615	Anchorage	Air Carrier
29	ATT/ Alascom	613	Anchorage	Telephone Communications
30	Spenard Builders Supply	573	Anchorage	Trade: Lumber Products
31	Westmark Hotels	572	Anchorage	Hotel
32	Peak Oilfield Service Company	559	Anchorage	Oil Field Services/Construction
33	Icicle Seafoods	557	Petersburg	Seafood Processing
34	J C Penney Company	555	Anchorage	General Merchandise
35	Peter Pan Seafoods	531	King Cove	Seafood Processing
36	Tanana Chiefs Conference	525	Fairbanks	Social Services/Health Care
37	HC Price	523	Fairbanks	Pipeline Service/Construction
38	Southeast Alaska Regional Health Corp.	522	Juneau	Health Care
39	Ogden Facility Management	517	Anchorage	Facilities Management
40	Anchorage Daily News	505	Anchorage	Newspaper
41	Pizza Hut	501	Anchorage	Eating Establishment
42	Alyeska Resort	493	Girdwood	Hotel/Resort
43	Costco	491	Anchorage	General Merchandise
44	GCI Communications	476	Anchorage	Telephone Communications

Alaska's 100 Largest Private Employers 1996

Rank	Firm Name	Employment	Headquarters or Largest Work Site	Business Activity
45	Ocean Beauty Seafoods	457	Kodiak	Seafood Processing
46	Cook Inlet Processing	456	Nikiski	Seafood Processing
47	Piquiniq Management Corp.	444	Anchorage	Facilities Management
48	Wards Cove Packing Company	422	Naknek	Seafood Processing
49	Burger King	416	Anchorage	Eating Establishment
50	Norquest Seafood Company	415	Ketchikan	Seafood Processing
51	NANA/Marriott Joint Venture	414	Anchorage	Catering
52	Aramark Leisure Services	413	Fairbanks	Catering/Concessionaire
53	Norton Sound Health Corporation	386	Nome	Health Care
54	United Parcel Service (UPS)	378	Anchorage	Courier Service
55	Anchorage Hilton Hotel	376	Anchorage	Hotel
56	Maniilaq Association	375	Kotzebue	Social Services/Health Care
57	Chugach Electric Association	375	Anchorage	Utility Company
58	Valley Hospital	365	Palmer	Hospital
59	Hope Cottages	364	Anchorage	Residential Care
60	Cominco Alaska	359	Red Dog/NW Arctic Bor.	Mining
61	North Pacific Processors	357	Kodiak	Seafood Processing
62	Captain Cook Hotel	354	Anchorage	Hotel
63	Salvation Army - Alaska	352	Anchorage	Social Services
64	Tesoro Northstore Company (7-11)	351	Anchorage	Retail/Gas Station
65	Williams, Inc. (Alaskan and Proud)	349	Ketchikan	Grocery
66	Nabors Alaska Drilling	348	Anchorage	Oil & Gas Well Drilling
67	Kinn Enterprises, dba McDonalds	348	Anchorage	Eating Establishment
68	Denali Foods/Taco Bell	347	Anchorage	Eating Establishment
69	Sea-Land Freight Service	347	Anchorage	Shipping & Warehouse
70	Westward Seafood	346	Unalaska	Seafood Processing
71	Alaska Hotel Properties (Princess Hotels)	345	Denali Park	Hotel
72	Nordstrom	331	Anchorage	Department Store
73	Chugach North Technical Services	326	Anchorage	Personnel Services
74	Reeve Aleutian Airways	326	Anchorage	Air Carrier
75	Thrifty Payless (former: Payless Drug Stores)	323	Anchorage	General Merchandise
76	Lamonts Apparel	322	Anchorage	Apparel
77	Peninsula Airways	310	Anchorage	Air Carrier
78	Ketchikan General Hospital	309	Ketchikan	Hospital
79	Matanuska Telephone Association	308	Palmer	Telephone Communications
80	Bristol Bay Area Health Corporation	308	Dillingham	Health Care
81	Silver Bay Logging	306	Juneau	Logging
82	Northwest Technical Services	305	Anchorage	Personnel Services
83	Mapco Express	300	Anchorage	Retail/Gas Station
84	Dynair Services	299	Anchorage	Airport Services
85	Doyon/Universal Ogden, Joint Venture	287	Anchorage	Catering/Security
86	Alaska Sales and Service	280	Anchorage	Car Dealership
87	ASSETS	280	Anchorage	Sheltered Workshop/Voc. Rehab.

Continued on page 4

Alaska's 100 Largest Private Employers 1996

Rank	Firm Name	Employment	Headquarters or Largest Work Site	Business Activity
88	Schlumberger Technologies	278	Anchorage	Oil Field Services
89	Key Bank of Alaska	270	Anchorage	Banking
90	Alyeska Seafoods	270	Unalaska	Seafood Processing
91	Rural Alaska Community Action Program	269	Anchorage	Social Services
92	International Seafoods of Alaska	264	Kodiak	Seafood Processing
93	Westours Motorcoaches	259	Fairbanks	Tour Buses
94	Sheraton Anchorage Hotel	249	Anchorage	Hotel
95	Norcon	249	Anchorage	Oil Field Services/Construction
96	Northwest Airlines	247	Anchorage	Air Carrier
97	The Industrial Company	245	Ketchikan	Construction
98	Sky Chefs	245	Anchorage	Catering
99	Eagle Hardware & Garden	243	Anchorage	Trade: Lumber Products
100	Anchorage Cold Storage Company	233	Anchorage	Wholesale-Grocery

TOTAL TRENDS 100 EMPLOYMENT 57,539

Note:
Based on 1996
average
employment. Firms
with identical
employment ranked
by unrounded
employment.

Source:
Alaska Department
of Labor, Research
and Analysis
Section.

these firms are either tourism related or are affected by that industry. These firms include Burger King, Alaska Hotel Properties (Princess Hotels) and Aramark Leisure Services, which runs hotels and concessions in Denali National Park and elsewhere. Their growing role among Alaska's largest employers is not surprising given the strong and uninterrupted growth in tourism. Chugach North Technical Services and Northwest Technical Services are both personnel supply firms. Growth in the use of contract labor and temporary help has been a boon to companies in that industry. Health care's growing influence in the economy is reflected by the improved ranking of Norton Sound Health Corporation and Valley Hospital. Laidlaw Transit grew from the acquisition of other bus companies, while the Doyon/Universal Ogden, Joint Venture, reflects the increasing weight of Native corporations in Alaska's economy.

Large employers employ more and pay better

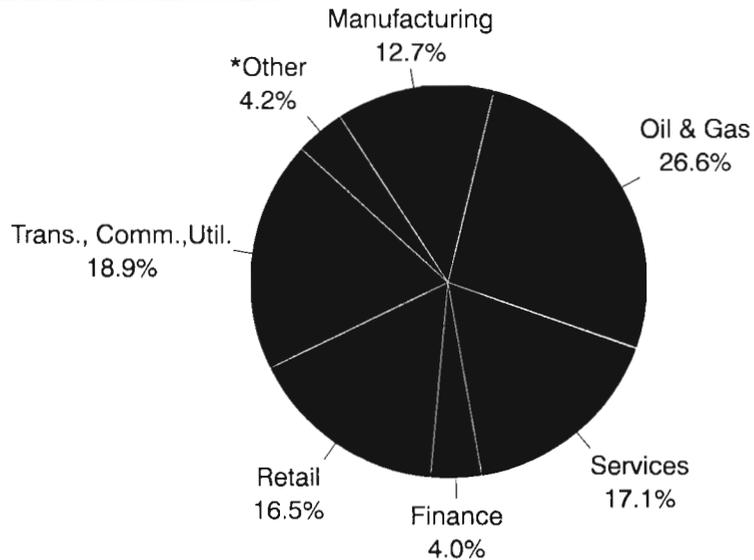
Alaska's *Trends* 100 employed 22% of all wage and salary workers in the state and provided nearly a third of all private sector jobs. With few exceptions, over the past decade, employment for the *Trends* 100 grew faster than that of the entire private sector. In 1996, total employment among Alaska's largest employers did not budge, much like the overall wage and salary workforce. While many enterprises made moderate employment gains, nearly an equal number of these firms became a bit smaller.

In 1996, these 100 largest firms paid out \$2.1 billion in wages. The annual average wage paid by the *Trends* 100 was \$37,112. For the remainder of the private sector, the average annual wage

Figure • 2

was \$30,382. One primary reason for the *Trends* 100's higher wages is the oil industry's influence. Unlike any other industry, oil industry employment is concentrated in larger firms. In 1996, 78% of all oil industry employees worked for *Trends* 100 firms. Because of their prominence, oil industry employers are responsible for 11.1% of the *Trends* 100 employment (See Figure 1.), although they represent only 4.3% of total private sector employment. Their influence on payroll is even larger because they pay much higher wages. A full 26.6% of the *Trends* 100 payroll comes from the oil industry. (See Figure 2.) In general, larger firms pay higher wages and, although benefits are not included in any of these numbers, they also tend to be more generous.

Oil and Gas Employees Earn Most of the Top 100 Firms' Payroll



*Other: Includes Hard Rock Mining, Wholesale Trade, and Construction.

Source: Alaska Department of Labor, Research and Analysis Section.

Table • 2

Trends 100 by Industry

Native corporations are well represented

Several of the *Trends* 100 employers are either subsidiaries of firms owned by one of Alaska's regional Native corporations or are one of the many Native nonprofit organizations. (See Table 6.) Because the *Trends* 100 employers are organized by individual firm without consideration for partial or full ownership, the leadership role of the core regional Native corporations in Alaska's labor market is masked.

If the subsidiaries were merged

	1996 Employment
MINING	
Hard Rock Mining	
Cominco Alaska	359
Oil & Gas	
ARCO Alaska	1,572
VECO	1,162
BP Exploration	1,132
Alaska Petroleum Contractors	1,103
Peak Oilfield Service Company	559
Nabors Alaska Drilling	348
Schlumberger Technologies	278
Norcon	249
CONSTRUCTION	
HC Price	523
The Industrial Company	245

Continued on page 6

Trends 100 by Industry (continued)

MANUFACTURING	1996 Employment
Seafood Processing	
Trident Seafoods	1,377
Tyson Seafood Group	860
UniSea	683
Icicle Seafoods	557
Peter Pan Seafoods	531
Ocean Beauty Seafoods	457
Cook Inlet Processing	456
Wards Cove Packing Company	422
Norquest Seafood Company	415
North Pacific Processors	357
Westward Seafood	346
Alyeska Seafoods	270
International Seafoods of Alaska	264
Wood Products	
Ketchikan Pulp Mill	752
Silver Bay Logging	306
Other Manufacturing	
Union Oil of California (Unocal)	682
Anchorage Daily News	505
TRANSPORTATION, COMMUNICATIONS, UTILITIES	
Air Transportation	
Alaska Airlines	1,355
Federal Express	760
ERA Aviation	615
United Parcel Service (UPS)	378
Reeve Aleutian Airways	326
Peninsula Airways	310
Dynair Services	299
Northwest Airlines	247
Communications & Utilities	
ATT/ Alascom	613
GCI Communications	476
Chugach Electric Association	375
Matanuska Telephone Association	308
Other Transportation	
Alyeska Pipeline Service Company	972
Laidlaw Transit	714
Sea-Land Freight Service	347
Westours Motorcoaches	259

Continued on page 7

according to ownership, nearly all of the regional Native corporations would appear on the *Trends 100* list. In spite of this definitional limitation, more than a dozen of the subsidiaries or other organizations made the list. The largest is Alaska Petroleum Contractors, an oil service company, with 1,103 employees and the state's 11th largest employer. It is a wholly owned subsidiary of Arctic Slope Regional Corporation. Alaska Petroleum Contractors moved onto the state's then Top 50 employer list in 1988 with an annual average employment level of 324. Today, it is one of the major players in the development of new oil fields on the North Slope. Cook Inlet Region Inc. (CIRI), the largest Native regional corporation, owns half of the Peak Oil Field Service Company. Other Native-owned businesses include the Nana/Marriott, Joint Venture, and Doyon/Universal Ogden, Joint Venture, that have a presence in the oil patch but also own and run hotels, employment services and other businesses. Many provide health care and social services. The largest is the Yukon Kuskokwim Health Corporation and not far behind is Fairbanks' second largest employer, the Tanana Chiefs Conference Inc. Because of compacting and the devolution of the federal government, these players will continue to grow as they take on more re-

sponsibilities for delivering health and social services. In future years, more Alaska-Native-owned firms will likely join the *Trends 100*.

Trends 100 by Industry (continued)

Nonprofits and health care are services' biggest players

Alaska's nonprofits are among the state's biggest employers. (See Table 7.) In fact, 14 of the *Trends 100* are nonprofits, and they employ 14% of this workforce. This list grows longer nearly every year. In 1996, the addition was Rural Alaska Community Action Program. Most nonprofit organizations provide some kind of health care, social or educational services or a combination of the above. For example, Tanana Chiefs, the Salvation Army, ASSETS, Maniilaq, and Bristol Bay Native Association all provide a mixture of these services. The nonprofits' employment will grow as direct government services shrink and these organizations move in to fill the gaps. Welfare reform will provide some further impetus for growth, as will health care and a host of other services.

Health care is a big player in both the nonprofit and services industry. For example, Providence Alaska Medical Center is the second largest private sector employer in the state. Health care reigns so prominently be-

TRADE	1996 Employment
Eating & Drinking	
Pizza Hut	501
Burger King	416
NANA/Marriott, Joint Venture	414
Aramark Leisure Services	413
Kinn Enterprises, dba McDonalds	348
Denali Foods/Taco Bell	347
Doyon/Universal Ogden, Joint Venture	287
Sky Chefs	245
Other Retail	
Carr Gottstein Foods	3,299
Fred Meyer	1,760
Wal-Mart/Sam's Club	1,284
Safeway Stores	982
Kmart	879
Alaska Commercial Company	655
Sears Roebuck	620
Spenard Builders Supply	573
J C Penney Company	555
Costco	491
Tesoro Northstore Company (7-11)	351
Williams, Inc. (Alaskan and Proud)	349
Nordstrom	331
Thrifty Payless (former: Payless Drug Stores)	323
Lamonts Apparel	322
Mapco Express	300
Alaska Sales and Service	280
Eagle Hardware & Garden	243
Wholesale	
Anchorage Cold Storage Company	233
FINANCE, INSURANCE & REAL ESTATE	
National Bank of Alaska	1,165
First National Bank of Anchorage	832
Alaska USA Federal Credit Union	685
Key Bank of Alaska	270

Continued on page 8

Trends 100 by Industry (continued)

Source: Alaska Department of Labor, Research and Analysis Section.

	1996 Employment
SERVICES	
Hotels	
Westmark Hotels	572
Alyeska Resort	493
Anchorage Hilton Hotel	376
Captain Cook Hotel	354
Alaska Hotel Properties (Princess Hotels)	345
Sheraton Anchorage Hotel	249
Personnel Services	
Chugach North Technical Services	326
Northwest Technical Services	305
Health Care	
Providence Alaska Medical Center	2,261
Fairbanks Memorial Hospital	1,012
Columbia Alaska Regional Hospital	684
Yukon Kuskokwim Health Corporation	669
Southeast Alaska Regional Health Corp.	522
Norton Sound Health Corporation	386
Valley Hospital	365
Ketchikan General Hospital	309
Bristol Bay Area Health Corporation	308
Other Services	
Tanana Chiefs Conference	525
Ogden Facility Management	517
Piquiniq Management Corp.	444
Maniilaq Association	375
Hope Cottages	364
Salvation Army - Alaska	352
ASSETS	280
Rural Alaska Community Action Program	269

either the largest or second largest employer in their communities.

The other big player in services is hotels. Like hospitals, many hotels provide around-the-clock services and are very labor intensive, but unlike hospitals they are much more seasonal. One additional hotel moved into the *Trends 100* this year, while some repeaters were among the biggest movers. Given the present small boom in hotel construction around the state, more hotels may join the list in the coming years.

Many of *Trends 100* are *Fortune 500* companies

Not surprisingly, some of the top employers in Alaska are large national firms. More than a quarter of the *Trends 100* firms also show up annually on the *Fortune 500* list. (See Table 8.) They vary from ARCO Alaska to Kmart and from Tyson to Pizza Hut.

Retail has the largest number of players

cause of the labor-intensive nature of this business, providing around-the-clock and year-round care. All of the *Trends 100* health care providers but one, Columbia Alaska Regional Hospital in Anchorage, are nonprofits. In many of their respective communities, particularly in rural Alaska, they are the single largest employer. For example, Yukon Kuskokwim Health Corporation (Bethel), Bristol Bay Health Corporation (Dillingham), Providence Alaska Medical Center (Anchorage), Norton Sound Health Corporation (Kotzebue), Fairbanks Memorial Hospital (Fairbanks) and Valley Hospital (MatSu Borough) represent

In 1996, the state's retailers employed nearly 29 percent of all *Trends 100* workers, providing not only the single largest slice of the employment pie but a growing one as well. In 1990, retailers accounted for 24% of this employment. This growth should not surprise even a casual watcher of Alaska's economy, given the incredible growth and the recent arrival of national retailers in the state's market. Retail's effect on payroll is considerably smaller. Only 16.5% of the *Trends 100* payroll comes from retail. Low wages and a preponderance of part-time employment reduce retailers' contribution to payroll.

Comparing the "Top Ten" Over the Past Decade

Rank 1996	Top 10 Employers in 1996	Rank 1986	Top 10 Employers in 1986
1	Carr Gottstein Foods	1	ARCO Alaska
2	Providence Alaska Medical Center	2	Carrs Quality Centers (now: Carr Gottstein Foods)
3	Fred Meyer	3	Providence Hospital (now: Providence Alaska Medical Center)
4	ARCO Alaska	4	SOHIO Alaska Petroleum Co. (now: BP Exploration)
5	Trident Seafoods	5	Lutheran Hospital & Homes of America (now: Fbks Memorial Hospital)
6	Alaska Airlines	6	Alascom (now: ATT/Alascom)
7	Wal-Mart/Sam's Club	7	National Bank of Alaska
8	National Bank of Alaska	8	Safeway Stores
9	VECO	9	VECO
10	BP Exploration	10	Alyeska Pipeline Service Company

Source: Alaska Department of Labor, Research and Analysis Section.

Table • 4

Although retail employment represents a big chunk of the *Trends* 100 employment, only 36% of all retail employment is represented by large employers. Smaller enterprises still dominate this industry. In 1996, more than 3,000 retailers not in the *Trends* 100 were operating in the state.

Trends 100 Newcomers

- Eagle Hardware & Garden
- Norcon
- Rural Alaska Community Action Program
- Sheraton Anchorage Hotel
- Sky Chefs
- The Industrial Company
- Westours Motorcoaches

Source: Alaska Department of Labor, Research and Analysis Section.

Table • 5

Lots of big players in manufacturing

Although manufacturing only employs 8.5% of the state's private wage and salary workforce, 16% of the *Trends* 100 workforce are employed by manufacturers. Seafood processing dominates this category, with 13 firms, one fewer than last year. Timber has the same number as last year, including the Ketchikan Pulp Company. Although this company closed its pulp mill in March 1997, its logging and sawmill operations may still place it on next year's list.

Trends 100 Movers

(Firms moving up 10 or more ranks from 1995)

- Alaska Hotel Properties (Princess Hotels)
- Aramark Leisure Services
- Burger King
- Chugach North Technical Services
- Doyon/Universal Ogden, Joint Venture
- Laidlaw Transit
- Northwest Technical Services
- Norton Sound Health Corporation
- Salvation Army - Alaska
- Valley Hospital
- Williams, Inc. (Alaskan and Proud)

Source: Alaska Department of Labor, Research and Analysis Section.

Air transportation remains dynamic

Although there is one fewer air transportation firm on the *Trends* 100 list (MarkAir Express), this industry remains one of the most dynamic groups of employers. All but two of these employers grew as most of them entered new markets,

Table • 6

Twelve of the *Trends* 100 Firms are Fully or Partially Owned or Operated by Alaska Native Corporations

Source: Alaska Department of Labor, Research and Analysis Section.

Alaska Petroleum Contractors	1,103
Anchorage Hilton Hotel (Sold in 1997)	376
Bristol Bay Area Health Corporation	308
Doyon/Universal Ogden, Joint Venture	287
Maniilaq Association	375
NANA/Marriott, Joint Venture	414
Norton Sound Health Corporation	386
Peak Oilfield Service Company	559
Piquniq Management Corp.	444
Southeast Alaska Regional Health Corp.	522
Tanana Chiefs Conference	525
Yukon Kuskokwim Health Corporation	669
Total	5,968

increased their volume or did both. At least four of these airlines (Alaska Airlines, Peninsula Airways, United Parcel Service, and Federal Express) built or began building new facilities.

Trends 100 are well represented geographically

Although 66 of the *Trends* 100 employers have their headquarters or their largest work site in Anchorage, only 13 of these employers are exclusively in Anchorage. For example, Carr's headquarters is in Anchorage, but, with stores in 16 different communities, 41% of its employment is located outside of Anchorage. The *Trends* 100 employer with the greatest geographic spread is National Bank of Alaska, which has offices in 29 communities around the state.

Table • 7

Nonprofit Organizations Employ Almost 14 Percent of the *Trends* 100 Workforce

Source: Alaska Department of Labor, Research and Analysis Section.

Providence Alaska Medical Center	2,261
Fairbanks Memorial Hospital	1,012
Yukon Kuskokwim Health Corporation	669
Tanana Chiefs Conference	525
Southeast Alaska Regional Health Corp.	522
Norton Sound Health Corporation	386
Maniilaq Association	375
Valley Hospital	365
Hope Cottages	364
Salvation Army - Alaska	352
Ketchikan General Hospital	309
Bristol Bay Area Health Corporation	308
ASSETS	280
Rural Alaska Community Action Program	269
Total	7,997

“Top Ten” changes with public sector inclusion

If a list of the *Trends* 100 included the public sector, this list would end up looking vastly different. In fact, only the following four private sector employers would show up among the top 10 employers: Carr Gottstein Foods, Providence Alaska Health Center, Fred Meyer and ARCO Alaska. (See Table 9.) This is no surprise, since the public sector employs 28% of the state’s wage and salary workforce and public sector employers as organizations also tend to be larger.

In a list that includes all public and private sector employers, the single largest player is the federal government, followed by state government and the University of Alaska. Local government entities also show up prominently on this list. For example, the fourth largest employer in the state is the Anchorage School District, and right behind it is the Municipality of Anchorage. In the future, private sector employers will play a more prominent role among the state’s largest employers as the public sector’s share of Alaska’s workforce continues to get smaller.

Alaska’s Trends 100 That Are Also America’s Fortune 500

ARCO Alaska
ATT/Alascom
Anchorage Hilton Hotel
Aramark Leisure Services
Burger King
Columbia Alaska Regional Health Corp.
Costco
Federal Express
Fred Meyer
J C Penney
Key Bank of Alaska
Kmart
Mapco Express
McDonalds
Nana/Marriott, Joint Venture
Nordstrom
Northwest Airlines
Pizza Hut
Safeway Stores
Sea-Land Freight Service
Sears Roebuck
Sheraton Anchorage Hotel
Taco Bell
Thrifty Payless (former: Payless Drug Store)
Tyson Seafood Group
Union Oil of California (Unocal)
United Parcel Service (UPS)
Wal-Mart/Sam’s Club

Source: Alaska Department of Labor, Research and Analysis Section.

The State’s Top 10 Employers Including the Public Sector

Rank	Name of Organization	Headquarters or Largest Work Site	Employment
1	Federal government	Anchorage	17,322
2	State of Alaska	Juneau	15,639
3	University of Alaska	Fairbanks	5,813
4	Anchorage School District	Anchorage	5,284
5	Municipality of Anchorage	Anchorage	3,516
6	Carr Gottstein Foods	Anchorage	3,299
7	Providence Alaska Health Center	Anchorage	2,261
8	Fairbanks North Star School District	Fairbanks	1,650
9	Fred Meyer	Anchorage	1,760
10	ARCO Alaska	Anchorage	1,572

Source: Alaska Department of Labor, Research and Analysis Section.

Labor Market Positive Despite Restrained Growth

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Labor force statistics reveal a positive labor market trend for Alaska in spite of a mixed industry performance with regard to employment numbers. Almost 1,500 fewer Alaskans were unemployed in May 1997 than in May one year ago. Alaska's unemployment rate dropped 1.3 percentage points in May to 7.0% (not seasonally adjusted)—a remarkable improvement over the 7.6% reading from a year ago. (See Table 4.) This is the lowest May unemployment rate since 1989—the year of the Exxon-Valdez oil spill, when clean-up efforts created numerous jobs.

The number of unemployed fell in 19 areas of the state and increased only slightly in eight over the past year. Kodiak, because of the fire-destroyed Tyson Seafood plant, had the largest increase of

unemployed workers. The jobless count fell most in the Kenai Peninsula Borough with 540 fewer unemployed. Construction and an early start of the visitor industry have helped to improve the Kenai Peninsula's unemployment picture.

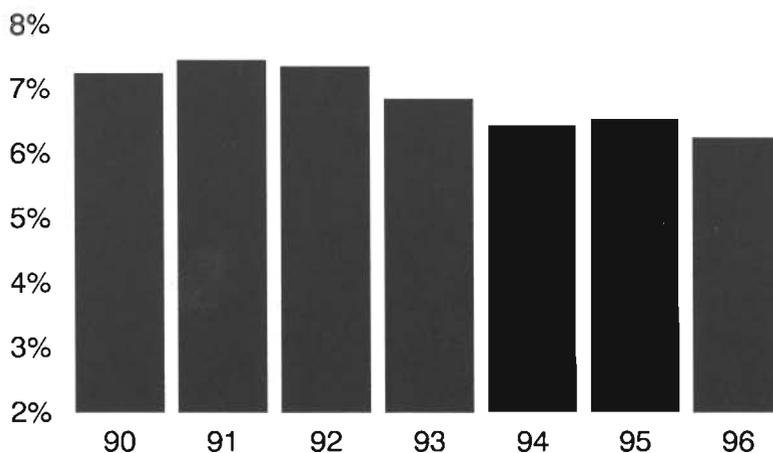
During the first five months of this year, Alaska's wage and salary employment grew by only 0.6%. Monthly annual comparisons show the pace of job growth decelerating from 1.1% in January to 0.1% in May. However, this change does not come as a surprise. Some employment losses were expected to occur in May following the closure of the Ketchikan Pulp Mill. The fire at the Tyson seafood plant in Kodiak brought about an unexpected job loss. Both of these employers were among the *Trends* 100 employers in 1996, when the two companies employed a combined average of over 1,600 workers. These two events held back both seasonal and annual job growth in May, effects that will persist into the future.

Job growth in the manufacturing sector may not recover fully from the losses in seafood processing and timber-related manufacturing. Other negatives surfaced in oil-related employment, where job counts in May

Figure • 1

Manufacturing's Share of Wage and Salary Employment Has Shrunk

Source: Alaska Department of Labor, Research and Analysis Section.



fell over eight percent below last year's level. This drop in oil industry employment should reverse later this year when new oil field development picks up. Although construction industries currently post over 300 fewer jobs than they did last year, gains in employment are expected to materialize as the season progresses. (See Table 1.) Adjusted construction schedules have shifted more job growth to later months. Once again services, retail and transportation industries, spurred by the visitor industry and air cargo traffic, have created sufficient jobs in May to mask the negative effects and turn employment growth slightly positive.

Some manufacturing industries face challenges

In 1990, the state's manufacturing industries employed 7.2% of the workforce. In 1996, their portion had slipped to 6.2%. (See Figure 1.) Since 1992, the number of jobs in manufacturing industries has fallen. Those connected to timber and seafood have been particularly hard hit.

Timber-related industries have suffered the biggest employment losses with a decline of about 40 percent between 1990 and 1996 and further losses in 1997. There is a possibility that Wrangell's saw mill will reopen, recapturing a few of the lost jobs.

Fish-processing employment increased with the rise of the groundfish fisheries in the late 1980s; but in the 1990s, its percentage share of total wage and salary employment declined with the expansive growth in the retail and services industries. Seafood processing employment lost ground in spite of the recent spectacular salmon harvests. This year, the large Tyson facility will be missed in Kodiak, although the company may revive some of its operation. But that is not all that ails in the fishing industry.

The progression of this year's summer salmon harvest bodes a repeat of last year's production and market problems. This year, the Copper River harvest produced a spectacular sockeye catch— more than double this region's average harvest. Harvest prices plummeted 36% below last year's level. These low prices reverberated in Kodiak and other regions. The Kodiak seine fleet forfeited over two weeks of fishing time, and most fishers in neighboring regions also remained on shore for the first opening, which idled the seafood processing crews.

Problems also surfaced on the Bristol Bay fishing grounds. Not only the low opening harvest prices but also a shockingly dismal catch in the Bay's waters amounted to a gloomy season. The Bristol Bay fleet landed a catch of only about 13 million fish, a paltry half of this year's harvest expectations. As a result of the weak catch in Bristol Bay, the fish processing companies probably will dismiss their crews earlier than in previous years. Although the industry's employment has not suffered big losses during the first five months of the year, the progression of this year's summer salmon fishery indicates that employment in seafood processing may fall below previous years' levels. Moreover, at this point it is not certain what will happen with this year's pink salmon harvest. The market outlook for pink salmon has not improved a lot. Fish processing companies, just like last year, may limit their purchases because they still are uncertain if they can sell the processed fish.

In timber and salmon economics, supply or demand problems cause difficulties. While timber industries are suffering a shortfall of supply, seafood industries are over-saturated with salmon. Also, the markets for pulp products and salmon have become more competitive.

A brighter employment picture is developing for petroleum-product-related manufacturing industries. Two refineries, the Tesoro plant in Nikiski

Table • 1

Nonagricultural Wage and Salary Employment by Place of Work

Alaska	p/		Changes from:			Municipality of Anchorage	p/		Changes from:		
	5/97	r/ 4/97	5/96	4/97	5/96		5/97	r/ 4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	267,600	257,400	267,400	10,200	200	Total Nonag. Wage & Salary	121,400	118,800	120,600	2,600	800
Goods-producing	37,700	35,100	39,200	2,600	-1,500	Goods-producing	10,500	9,200	10,800	1,300	-300
Service-producing	229,900	222,300	228,200	7,600	1,700	Service-producing	110,900	109,600	109,800	1,300	1,100
Mining	9,200	9,000	9,600	200	-400	Mining	2,300	2,300	2,500	0	-200
Construction	12,500	10,300	12,800	2,200	-300	Construction	6,200	5,000	6,300	1,200	-100
Manufacturing	16,000	15,800	16,800	200	-800	Manufacturing	2,000	1,900	2,000	100	0
Durable Goods	3,300	3,000	3,500	300	-200	Transportation	12,200	11,700	12,100	500	100
Lumber & Wood Products	2,100	1,900	2,300	200	-200	Air Transportation	4,900	4,800	4,600	100	300
Nondurable Goods	12,700	12,800	13,300	-100	-600	Communications	2,400	2,300	2,200	100	200
Seafood Processing	10,000	9,900	10,200	100	-200	Trade	29,700	28,900	29,400	800	300
Pulp Mills	100	300	500	-200	-400	Wholesale Trade	6,700	6,500	6,600	200	100
Transportation	24,200	22,200	23,900	2,000	300	Retail Trade	23,000	22,400	22,800	600	200
Trucking & Warehousing	3,000	2,700	2,900	300	100	Gen. Merch. & Apparel	4,300	4,200	4,300	100	0
Water Transportation	2,100	1,800	2,200	300	-100	Food Stores	2,800	2,700	2,800	100	0
Air Transportation	7,900	7,500	7,600	400	300	Eating & Drinking Places	8,200	8,000	8,100	200	100
Communications	3,900	3,800	3,800	100	100	Finance-Ins. & Real Estate	7,100	7,000	7,100	100	0
Trade	55,500	52,100	55,300	3,400	200	Services & Misc.	34,300	33,600	33,600	700	700
Wholesale Trade	8,900	8,600	8,800	300	100	Hotels & Lodging Places	2,700	2,400	2,700	300	0
Retail Trade	46,600	43,500	46,500	3,100	100	Business Services	6,000	5,900	5,800	100	200
Gen. Merch. & Apparel	8,500	8,200	8,700	300	-200	Health Services	7,400	7,300	7,100	100	300
Food Stores	6,900	6,700	7,000	200	-100	Engineering & Mngmt. Serv.	5,000	5,000	4,900	0	100
Eating & Drinking Places	16,100	14,400	15,900	1,700	200	Government	27,600	28,400	27,600	-800	0
Finance-Ins. & Real Estate	11,700	11,400	11,800	300	-100	Federal	10,100	9,900	10,000	200	100
Services & Misc.	65,000	62,000	63,400	3,000	1,600	State	7,500	8,400	7,500	-900	0
Hotels & Lodging Places	6,900	5,400	6,700	1,500	200	Local	10,000	10,100	10,100	-100	-100
Business Services	8,100	7,900	8,000	200	100						
Health Services	14,300	14,100	13,700	200	600						
Engineering & Mngmt. Serv.	7,500	7,400	7,100	100	400						
Government	73,500	74,600	73,800	-1,100	-300						
Federal	17,600	16,800	17,600	800	0						
State	20,200	22,300	20,600	-2,100	-400						
Local	35,700	35,500	35,600	200	100						

Table • 2

Alaska Hours and Earnings for Selected Industries

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	p/ 5/97	r/ 4/97	5/96	p/ 5/97	r/ 4/97	5/96	p/ 5/97	r/ 4/97	5/96
Mining	1245.49	1307.08	1256.73	48.2	50.8	51.4	25.84	25.73	24.45
Construction	1093.49	1043.86	1136.07	43.0	41.0	45.1	25.43	25.46	25.19
Manufacturing	509.98	485.07	521.40	43.0	42.7	45.3	11.86	11.36	11.51
Seafood Processing	373.68	384.98	389.15	43.2	44.2	47.4	8.65	8.71	8.21
Trans., Comm. & Utilities	629.88	630.17	646.90	34.8	34.1	34.3	18.10	18.48	18.86
Trade	416.74	415.63	414.62	33.5	33.6	33.6	12.44	12.37	12.34
Wholesale	629.57	625.82	635.84	38.6	38.3	38.7	16.31	16.34	16.43
Retail	375.38	372.94	373.76	32.5	32.6	32.7	11.55	11.44	11.43
Finance-Ins. & R.E.	506.23	515.46	481.09	35.5	36.3	35.4	14.26	14.20	13.59

Notes to Tables 1-3:

Tables 1&2- Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

Table 3- Prepared in part with funding from the Employment Security Division.

p/ denotes preliminary estimates.

r/ denotes revised estimates.

Government includes employees of public school systems and the University of Alaska.

Average hours and earnings estimates are based on data for full- and part-time production workers (manufacturing) and nonsupervisory workers (nonmanufacturing). Averages are for gross earnings and hours paid, including overtime pay and hours.

Nonagricultural Wage and Salary Employment by Place of Work

Southeast Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	36,850	34,800	36,900	2,050	-50
Goods-producing	5,450	5,200	5,800	250	-350
Service-producing	31,400	29,600	31,100	1,800	300
Mining	350	350	250	0	100
Construction	1,950	1,750	1,950	200	0
Manufacturing	3,150	3,100	3,600	50	-450
Durable Goods	1,650	1,500	1,800	150	-150
Lumber & Wood Products	1,450	1,300	1,600	150	-150
Nondurable Goods	1,500	1,600	1,800	-100	-300
Seafood Processing	1,100	1,000	1,000	100	100
Pulp Mills	150	350	550	-200	-400
Transportation	3,150	2,500	3,150	650	0
Trade	6,900	6,250	6,900	650	0
Wholesale Trade	500	500	500	0	0
Retail Trade	6,400	5,750	6,400	650	0
Finance-Ins. & Real Estate	1,500	1,400	1,500	100	0
Services & Misc.	7,200	6,650	7,000	550	200
Government	12,650	12,800	12,550	-150	100
Federal	2,050	1,900	2,050	150	0
State	5,250	5,500	5,250	-250	0
Local	5,350	5,400	5,250	-50	100

Interior Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	38,450	35,650	38,100	2,800	350
Goods-producing	3,950	3,200	3,950	750	0
Service-producing	34,500	32,450	34,150	2,050	350
Mining	1,200	1,050	1,100	150	100
Construction	2,200	1,650	2,300	550	-100
Manufacturing	550	500	550	50	0
Transportation	3,350	2,750	3,250	600	100
Trade	8,200	7,050	8,050	1,150	150
Finance-Ins. & Real Estate	1,050	1,050	1,050	0	0
Services & Misc.	8,950	8,300	8,750	650	200
Government	12,950	13,300	13,050	-350	-100
Federal	3,950	3,650	4,000	300	-50
State	4,300	4,950	4,400	-650	-100
Local	4,700	4,700	4,650	0	50

Fairbanks North Star Borough	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	33,150	31,050	32,750	2,100	400
Goods-producing	3,500	2,800	3,400	700	100
Service-producing	29,650	28,250	29,350	1,400	300
Mining	1,000	900	900	100	100
Construction	1,950	1,400	1,950	550	0
Manufacturing	550	500	550	50	0
Transportation	2,550	2,300	2,500	250	50
Trucking & Warehousing	650	550	600	100	50
Air Transportation	650	650	650	0	0
Communications	300	300	300	0	0
Trade	7,550	6,500	7,400	1,050	150
Wholesale Trade	800	750	750	50	50
Retail Trade	6,750	5,750	6,650	1,000	100
Gen. Merch. & Apparel	1,300	1,100	1,200	200	100
Food Stores	750	700	750	50	0
Eating & Drinking Places	2,750	2,100	2,800	650	-50
Finance-Ins. & Real Estate	950	950	1,000	0	-50
Services & Misc.	8,050	7,550	7,900	500	150
Government	10,550	10,950	10,550	-400	0
Federal	3,350	3,150	3,350	200	0
State	4,050	4,700	4,100	-650	-50
Local	3,150	3,100	3,100	50	50

Anchorage/MatSu Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	132,150	128,700	131,150	3,450	1,000
Goods-producing	11,150	9,750	11,400	1,400	-250
Service-producing	121,000	118,950	119,750	2,050	1,250
Mining	2,350	2,300	2,500	50	-150
Construction	6,700	5,450	6,800	1,250	-100
Manufacturing	2,100	2,000	2,100	100	0
Transportation	13,200	12,600	12,950	600	250
Trade	32,450	31,350	32,250	1,100	200
Finance-Ins. & Real Estate	7,550	7,450	7,550	100	0
Services & Misc.	37,200	36,150	36,250	1,050	950
Government	30,600	31,400	30,750	-800	-150
Federal	10,250	10,000	10,150	250	100
State	8,350	9,300	8,400	-950	-50
Local	12,000	12,100	12,200	-100	-200

Gulf Coast Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	26,900	25,250	27,700	1,650	-800
Goods-producing	6,200	5,800	6,650	400	-450
Service-producing	20,700	19,450	21,050	1,250	-350
Mining	1,000	950	900	50	100
Construction	1,100	900	1,150	200	-50
Manufacturing	4,100	3,950	4,600	150	-500
Seafood Processing	2,800	2,650	3,300	150	-500
Transportation	2,300	2,100	2,350	200	-50
Trade	5,150	4,650	5,250	500	-100
Wholesale Trade	550	550	550	0	0
Retail Trade	4,600	4,100	4,700	500	-100
Finance-Ins. & Real Estate	650	650	700	0	-50
Services & Misc.	5,700	5,100	5,800	600	-100
Government	6,900	6,950	6,950	-50	-50
Federal	750	650	750	100	0
State	1,550	1,700	1,650	-150	-100
Local	4,600	4,600	4,550	0	50

Southwest Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	18,600	18,250	18,450	350	150
Goods-producing	6,200	6,250	6,050	-50	150
Service-producing	12,400	12,000	12,400	400	0
Seafood Processing	6,000	6,050	5,800	-50	200
Government	5,800	5,550	5,900	250	-100
Federal	450	400	500	50	-50
State	500	500	550	0	-50
Local	4,850	4,650	4,850	200	0

Northern Region	p/		Changes from:		
	5/97	4/97	5/96	4/97	5/96
Total Nonag. Wage & Salary	14,450	14,500	14,950	-50	-500
Goods-producing	4,750	4,800	5,350	-50	-600
Service-producing	9,700	9,700	9,600	0	100
Mining	4,350	4,350	4,900	0	-550
Government	4,650	4,700	4,550	-50	100
Federal	200	200	200	0	0
State	300	300	300	0	0
Local	4,150	4,200	4,050	-50	100

Table • 4

Unemployment Rates by Region & Census Area

	Percent Unemployed			
	Not Seasonally Adjusted	p/ 5/97	r/ 4/97	5/96
	United States	4.7	4.8	5.4
	Alaska Statewide	7.0	8.3	7.6
	Anch.-MatSu Region	5.9	6.8	6.3
	Municipality of Anchorage	5.1	5.9	5.4
	MatSu Borough	9.9	11.9	10.8
	Gulf Coast Region	11.0	13.6	12.3
	Kenai Peninsula Borough	10.9	14.9	13.5
	Kodiak Island Borough	13.4	10.8	10.5
	Valdez-Cordova	8.0	12.4	9.8
	Interior Region	7.3	9.3	8.0
	Denali Borough	7.2	14.5	5.1
	Fairbanks North Star Borough	6.8	8.5	7.2
	Southeast Fairbanks	9.8	14.1	11.9
	Yukon-Koyukuk	14.2	16.0	20.6
	Northern Region	11.5	11.1	14.4
	Nome	13.4	13.5	16.8
	North Slope Borough	5.4	5.3	6.3
	Northwest Arctic Borough	17.2	16.0	22.0
	Southeast Region	6.3	8.0	6.6
	Haines Borough	7.5	12.7	7.0
	Juneau Borough	4.7	6.1	5.3
	Ketchikan Gateway Borough	7.8	8.8	7.6
	Prince of Wales-Outer Ketchikan	13.1	13.2	12.3
	Sitka Borough	4.9	6.1	5.3
	Skagway-Hoonah-Angoon	6.2	9.5	4.4
	Wrangell-Petersburg	5.4	9.3	7.7
	Yakutat Borough	9.4	11.9	6.4
	Southwest Region	6.9	7.9	8.3
	Aleutians East Borough	2.9	3.4	4.1
	Aleutians West	4.7	4.5	3.0
	Bethel	7.8	8.4	10.7
	Bristol Bay Borough	5.4	12.0	7.3
	Dillingham	6.0	7.5	8.2
	Lake & Peninsula Borough	6.0	9.3	7.4
	Wade Hampton	11.9	13.2	12.6
	Seasonally Adjusted			
	United States	4.8	4.9	5.6
	Alaska Statewide	6.9	7.9	7.5

p/ denotes preliminary estimates

r/ denotes revised estimates

Benchmark: March 1996

Comparisons between different time periods are not as meaningful as other time series published by the Alaska Department of Labor.

The official definition of unemployment currently in place excludes anyone who has not made an active attempt to find work in the four-week period up to and including the week that includes the 12th of each month. Due to the scarcity of employment opportunities in rural Alaskan locations, many individuals do not meet the official definition of unemployed because they have not conducted an active job search. These individuals are considered not in the labor force.

Source: Alaska Department of Labor, Research and Analysis Section.

and the Mapco facility in North Pole, are expanding their operations. A sharp increase in the demand for jet fuel has maximized existing refining capacity. This demand, of course, stems from increasing air cargo traffic passing through Anchorage.

Construction employment to pick up later in the season

Some shifts in Alaska's construction schedule have impacted employment. Two large early summer projects, construction of the Kensington mine and the Whittier road project, have been delayed. The mine project was stalled by a year, and the road project, although recently back on again, experienced a delay of a few months. These delays, combined with the completion of other large projects, have caused employment numbers to decline compared to last year's performance. However, other sizable projects have been added to the list and are only a few months away from breaking ground. A \$125 million seafood center will be built in Anchorage. Alyeska Pipeline Service Company will build an office building in Fairbanks to house its transferred workers. The Mapco refinery in North Pole is planning for a \$60 million expansion. These projects and others will be large enough to offset the other delays. Residential construction in Fairbanks and Anchorage is brisk. So far this season, residential building permit values in Anchorage have exceeded last year's by 18%.

Summary

Although seasonal employment growth was on the slow side this May, there are signs that the economy will pick up speed as summer progresses. In spite of a slow start, construction employment will gain ground and turn in a good season. In May, employment in services, retail and transportation industries grew enough to offset some of the temporary job losses in oil-related industries and the lost seafood processing and timber industry jobs. Because salmon markets remain volatile this season, harvesters and fish processing companies will struggle over product prices. All told, although employment is growing at a slow rate, unemployment statistics have improved in most areas of the state.

Alaska Employment Service

Anchorage: Phone 269-4800

Bethel: Phone 543-2210

Dillingham: Phone 842-5579

Eagle River: Phone 694-6904/07

Mat-Su: Phone 352-2500

Fairbanks: Phone 451-5967

Glennallen: Phone 822-3350

Kotzebue: Phone 442-3280

Nome: Phone 443-2626/2460

Tok: Phone 883-5629

Valdez: Phone 835-4910

Kenai: Phone 283-2927

Homer: Phone 235-7791

Kodiak: Phone 486-3105

Seward: Phone 224-5276

Juneau: Phone 465-4562

Petersburg: Phone 772-3791

Sitka: Phone 747-3347/3423/6921

Ketchikan: Phone 225-3181/82/83



Alaska Economic Regions

The Alaska Department of Labor shall foster and promote the welfare of the wage earners of the state and improve their working conditions and advance their opportunities for profitable employment.