

J. M. HUMMEL

*Complimented by
Jim Smith*

**ECONOMIC & POPULATION
FORECASTS
1974-1995**

**City of Rock Springs
Wyoming**

July 1974

CITY OF ROCK SPRINGS

WYOMING

ECONOMIC AND POPULATION

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PREPARED BY

CITY OF ROCK SPRINGS

DEPARTMENT OF ENGINEERING, PLANNING

AND COMMUNITY DEVELOPMENT

JULY 1974

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ACKNOWLEDGMENTS

CITY OFFICIALS

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Chad Erickson	Rehabilitation Officer
Barbara D. Smith	Executive Secretary
Carmen DeBernardi	Housing Administrator
Thomas H. Notos	Consultant
Wayne Johnson	City Engineer

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INTRODUCTION

This report is the first step in the process of revising the Rock Springs Comprehensive Plan. It examines the economic base of the community and also looks at what the community can presently expect in terms of economics and population growth. These expectations of future growth can then be used to develop a Capital Improvements Program, Parks and Recreation Plan, and expand and revise other elements of the Comprehensive Plan.

The present Plan was completed in December 1971. At that time the expectations for growth were much lower. For instance, the projected population in 1990 was 26,500, while this report estimates the present population to be 23,500. The need for revision and expansion is definitely there. It was hoped that a major revision could be undertaken during fiscal year 1974-75. But due to uncertainty about receiving funding so that additional help can be obtained, there is uncertainty as to the scope of work that can be undertaken. It appears that no additional funding will be obtained from the U. S. Department of Housing and Urban Development through the State Department of Economic Planning and Development. This report is, however, the basis upon which other elements of the Comprehensive Plan can be updated and expanded as time and funds permit.

HISTORY

Sweetwater County, with an area of 10,429 square miles, has an average altitude of 6,100 feet above sea level. The annual mean temperature is 37.6 degrees and average yearly precipitation is 8.22 inches.

The forces creating the location of Rock Springs began in 1862 when Lincoln signed the bill authorizing the construction of a railroad to the Pacific coast. The Union Pacific Railroad was formed that same year and began surveys to determine the most feasible route. By 1864 a general route through southern Wyoming had been selected. This decision was prompted in part by friendly Indians and the availability of coal in the area. The legislation providing for the construction of the railroad reserved all mineral rights to the government and gave the companies the odd sections for 10 miles on each side of the tracks as a subsidy. In July of 1864 the law was amended to provide the companies with title to minerals found under their lands and the land grants were increased to 20 miles on each side of the tracks. After this amendment the railroad locations were modified to place them as close as possible to known coal deposits.

In the early years of the railroad, all mining was carried on by individuals and separate mining companies. Many early mines were located on government land claimed or homesteaded by the settlers. In July of 1868 the Union Pacific contracted with Wyoming Coal and Mining Company to explore for and produce coal from railroad lands. About that same time the railroad reached the present site

of Rock Springs and mining activity by Wyoming Coal along with individual operators began. This concentration of miners encouraged the establishment of the city which served the needs of the people and the industry. In large part, the life of the city has continued to depend on the railroad and coal industry for more than 100 years.

ECONOMY

This report considers two sectors of the local economy, the basic or "export" sector and the non-basic or "service" sector. The basic sector is composed of those industries that export goods and services from the region (or import money into the region). The non-basic sector is composed of those industries that supply needed goods and services to the people and businesses of the basic sector.

The basic industries of Sweetwater County are the mining industry first and foremost, manufacturing industry, agriculture, and that part of the utilities industry involved with the generation of power for export. These industries bring money into the area in the form of wages and salaries, and because of this added buying power other businesses expand or move into the community to provide the goods and services demanded. It is generally the case that one job in the basic sector will create about 1.7 non-basic jobs.

That part of the construction industry involved in plant construction is also considered part of the basic sector. These jobs are of a relatively temporary nature however, and because of this they do not create the same number of jobs in the non-basic sector that other basic jobs do. Businesses generally cannot afford to expand or move into an area to provide services for employees that would only be in the community from 5 to 10 years. It takes more time than that to amortize the capital investment required. It has been estimated that one of these basic jobs will create about .5 non-basic jobs.

MINING INDUSTRY

The mining industry is the primary industry of the area. Sweetwater County is well endowed with mineral resources. Trona, coal, petroleum, natural gas, oil shale, and uranium are the most significant of the minerals occurring in the county.

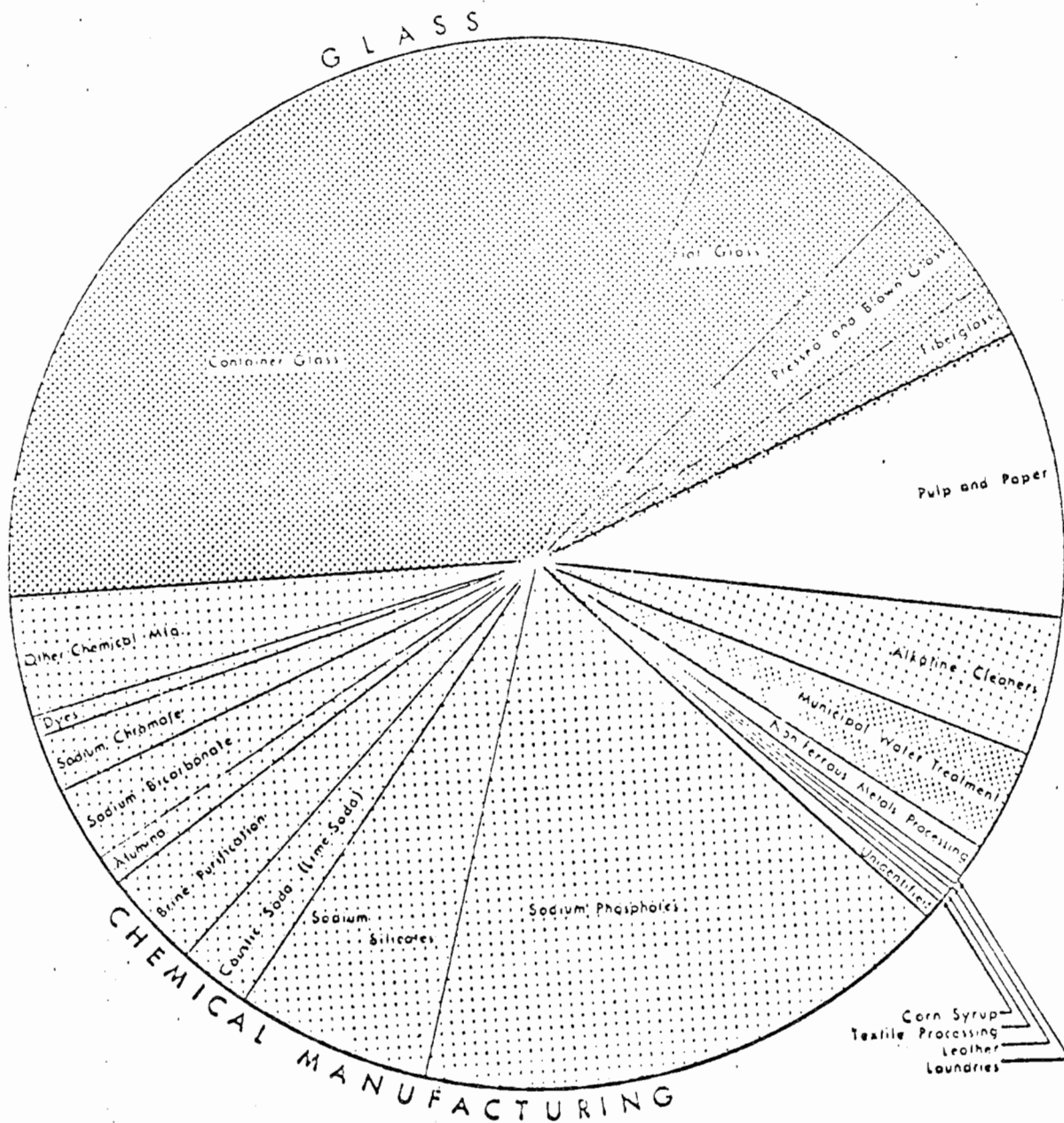
TRONA

The trona industry is presently the largest segment of the mining industry. In 1938 trona was discovered in the Green River Basin by accident when Mountain Fuel was drilling for oil. Instead of oil they found an unfamiliar white substance later found to be trona. Trona was a new mineral and it was not until 1947 that it was considered to have commercial value. It was in that year that the Westvaco Chemical Company first started to mine the trona.

Trona is naturally occurring sodium sesquicarbonate ($\text{Na}_2\text{CO}_3 \cdot \text{NaHCO}_3 \cdot 2\text{H}_2\text{O}$) and is brown to gray, soft, translucent mineral with a glossy or earthy appearance. The major use is in the glass manufacturing industry. The paper industry is also a major user of soda ash (refined trona). There are many other smaller users of soda ash (See Graph #1) and the list of uses is growing constantly.

Stimulated by the increasing number of uses for soda ash and by phasing out of obsolete and heavily polluting soda ash manufacturing facilities in the east, growth of the trona - soda ash industry took on spectacular proportions in the early 1960's, Stauffer Chemical Company opened a completely integrated

PRINCIPAL END-USES OF SODA ASH



SOURCE: "ROCK SPRINGS AREA FORECAST", MOUNTAIN BELL

trona mine and soda ash plant in the summer of 1962 at Big Island. Allied Chemical Company and Food Machinery Company (FMC) have also opened full-scale operations. A fourth company, Texas Gulf Sulphur Corporation, has announced plans to begin full-scale mining operations and construct a \$75,000,000 processing plant. Expansion is also underway at all three currently producing facilities. Allied completed a \$25 million expansion in early 1973 and is now starting a \$65 million expansion. FMC will continue expanding this year at a cost in excess of \$50 million.

The current production of trona is about 5,500,000 tons per year or about 3,000,000 tons of refined soda ash. Soda ash production is expected to increase to 7.7 million tons per year by 1975. This makes Wyoming the largest producer of natural soda ash in the world. It supplies about one-fourth of the world supply and over 40% of the domestic supply. A considerable amount of soda ash is exported, mainly to Canada but as far as South Africa and New Zealand.

There is an estimated 50 billion tons of trona in beds of minable thickness in the Green River Basin. This almost inexhaustible resource will be a major factor in the economy of Sweetwater County for many years to come.

COAL

Commercial coal mining in Sweetwater County began in 1860 as the Wyoming portion of the Union Pacific Railroad was completed. Record annual production exceeded 6 million tons in 1945. When the railroads converted to diesel engines in the 1950's however, the county's coal industry collapsed. By 1956, Sweetwater

County, which had always been one of the state's largest coal producers, was reduced to one of the smallest. In 1972 it accounted for less than 5% of the state's production or less than 500,000 tons.

The current decline in production will soon end as the demand for energy increases and as strip mining becomes the dominant method of extraction. Pacific Power & Light and Idaho Power's Jim Bridger Power Plant near Point of Rocks will require about 5.5 million tons of coal annually to fuel the 2000 MW generator. This is to be supplied by a strip mine north of the plant site. Rocky Mountain Energy has also announced plans to reopen the Stansbury mine (an underground mine) with production of 1 million tons per year. There have been other companies considering the opening of mines in the area but as of yet no announcements have been made.

Sweetwater County has more than 15.2 billion tons of mapped and explored coal between 0 and 3000 feet below the land surface, although it is generally conceded that approximately one-half of that amount is recoverable. A more meaningful resource is the 5 billion tons of coal under 0 to 1000 feet of cover. It is within this range that both current underground mining and strip mining are concerned.

Underground coal mines are generally designed to a maximum depth of 1000 feet with the minimum seam thickness of 42 inches. In areas where the cover is less than 100 feet, underground mining is extremely inefficient and hazardous; therefore, this shallower coal is best recovered by strip mining methods. Today,

strippable coal resources are usually limited to coals under less than 200 feet of cover. Although there is no minimum thickness for a strippable seam, subbituminous coals less than 5 feet thick and bituminous coals less than 28 inches thick are not included in strippable resource estimates. Known strippable resources of over 1 billion tons underlie approximately 92 square miles of the county. This is about 0.8% of the county's total area.

The area's vast coal resources together with the current shortage of energy, the high price of crude oil, and available technology combine to make coal one of the most important resources for the future.

PETROLEUM AND NATURAL GAS INDUSTRIES

Exploration for oil began in Sweetwater County about 1915, with the first significant discovery being made in 1916 at what is now the Lost Soldier Field. In 1971, 66,444,000 thousand cubic feet of natural gas was produced along with 8 million barrels of oil. Total production from 1916 through 1972 has been about 270 million barrels of oil and 1,284,626,242 million cubic feet of natural gas. The Wyoming Mineral Yearbook forecasts that natural gas and oil production will be 75,000,000 MCF and 15 million barrels respectively in 1976. It should be noted that oil production is expected to increase in Sweetwater County while the state's total oil production is forecast to decrease. The recent discovery of the Brady Field has spurred interests in deeper strata (18000 ft.). It appears that the oil and gas industry will be an important segment of the mining industry for some years to come.

OIL SHALE INDUSTRY

Collectively, 3700 square miles of some of the remote portions of the Green River and Washakie Basins of Sweetwater County are underlain by oil shale. This laminated, oil-bearing rock, which is more exactly an organic-rich dolomitic marlstone, was deposited 60 million years ago in Eocene fresh water lakes. It is estimated that there is between 370 and 430 billion barrels of shale oil contained in Wyoming oil shale deposits 10 feet or more in thickness and yielding 10 or more gallons per ton. This gives Wyoming the second largest shale oil resources in the nation.

Near Rock Springs the U. S. Bureau of Mines successfully recovered shale oil by an in-situ method of extraction (heating the rock in place to recover the shale oil) as early as 1969. Although the in-situ utilization of oil shale has perhaps the greatest potential, surface mining and underground mining are also under investigation.

Recently, however, two federal shale oil leases were put up for sale in the Washakie Basin but no bids were received. The deposits were to be recovered by the in-situ process. It is not known at this time whether or not the leases will be offered again.

There is no question as to whether or not these shale oil deposits will be utilized but due to a lack of bidding on the tracts offered the timing of any development cannot be determined. The market conditions and developing technology will be determining factors in the development of the shale oil industry.

MISCELLANEOUS MINERALS

Small deposits of Titanium used in pigments for paints and aerospace construction, Thorium, used in nuclear reactors of the breeder type, and Alumite, the raw material for the manufacture of alum, have all been found in Sweetwater County but do not yet have commercial value.

MANUFACTURING

The manufacturing industry is relatively small (225 employees) in Sweetwater County. This is not expected to change significantly unless a major new industry locates in the area, such as a glass manufacturing plant. The basic raw materials exist in the area for such a plant, however, the major markets are, as yet, too distant for such development. The raw materials for other manufacturing industries exist in the area, but again the location of markets is a prime consideration in plant location. As major markets develop in the Rocky Mountain west this segment of the economy will take on more importance.

AGRICULTURE

The agriculture of the area is devoted mainly to the raising of sheep. In 1972 there were over 10,000 head of cattle and over 76,000 head of sheep being raised in the county. This segment of the economy is expected to remain fairly constant.

CONSTRUCTION

The construction industry must be divided into two categories. One category is composed of the workers involved in plant construction. The other is composed of the workers involved in other areas of construction. The workers

in the first category are part of the basic sector while those in the second are in the non-basic sector.

Those workers involved in plant construction are more or less temporary. That is their jobs will last from 5 to 10 years. While the other construction employees are involved in the process of building the community and the size of this work force depends upon the size of the community. This is a fairly continual process and, therefore, these jobs are more permanent.

The two segments of the construction industry have different outlooks. The plant construction segment will fluctuate considerably as one plant begins construction large numbers of employees will be required (up to 3000 were required at the Jim Bridger Plant). But as the plant is completed these jobs will disappear. The other segments, however, will maintain a fairly constant growth rate, in proportion to the growth of new permanent jobs in the basic sector.

TRANSPORTATION, COMMUNICATION, AND UTILITIES

This industry group is part of the non-basic sector. However, that part of the utilities industry involved with power generation is considered part of the basic sector.

Presently there is only one generation facility under construction, the Jim Bridger Power Plant. There is scheduled to be 4 units with a generation capacity of 500 megawatts each. However, a fifth and a sixth unit are being considered for future development. As of yet no other companies have proposed

the construction of generation facilities. With the large coal reserves of the county, however, other electrical generation, gasification, or liquification facilities seem likely. The timing of such development, however, depend upon future market conditions and the availability of water.

The rest of the T.C.U. industries are growing and will continue to grow roughly in proportion to the growth of the basic sector. This is also true of the other non-basic industries; finance, insurance, and real estate (F.I.R.E.) and wholesale and retail trade and the service industries.

The non-basic industries will locate in Rock Springs and Green River. Non-basic industries tend to centralize due to agglomeration effects. That is, business generated by one firm will generate business for another firm located next to it and vice versa. Because Rock Springs and Green River are presently the trade centers for a quite large area, it is expected that future development of the non-basic sector will be concentrated in these two communities.

EMPLOYMENT PROJECTIONS

The estimates of current employment are based on the estimated work force at the major employers, the estimate of the Wyoming State Employment Service (TABLE 1), the number of passenger cars registered (TABLE 2), sales tax revenue in the county (TABLE 4), and building permits issued (TABLE 3). School enrollments were also considered (TABLE 5). The figures would indicate that it is predominantly young families that are migrating into Rock Springs.

TABLE 1

Employment Estimates
Wyoming State Employment Service

<u>AVERAGE WORK FORCE</u>						
1969	1970	1971	1972	1973	1974	1975
7,710	7,800	8,310	10,620	15,000	16,100	17,700
<u>AVERAGE TOTAL EMPLOYMENT</u>						
7,350	7,400	7,980	10,260	14,550	15,950	16,500
<u>COVERED EMPLOYMENT</u>						
5,213	5,317	5,852	7,774	11,400	12,800	14,200
<u>ANNUAL AVERAGE SALARY</u>						
\$ 5,915	\$ 6,174	\$ 6,789	\$ 8,048	\$ 8,650	\$ 9,688	\$ 10,656
<u>UNEMPLOYED WORKERS & RATING</u>						
360 (4.7)	400 (5.1)	330 (4.0)	360 (3.4)	450 (3.0)	500 (3.8)	600 (3.8)

TABLE 2

Passenger Car Licences

<u>YEAR</u>	<u>SWEETWATER COUNTY</u>	<u>% CHANGE</u>
1960	6,739	-----
1961	7,186	6.6 %
1962	7,270	1.2 %
1963	7,095	- 2.5 %
1964	7,146	0.7 %
1965	7,085	- 0.9 %
1966	7,205	1.7 %
1967	7,331	1.7 %
1968	7,313	0.0 %
1969	7,588	3.7 %
1970	7,865	3.6 %
1971	8,727	11.0 %
1972	9,982	14.4 %
1973	12,033	20.5 %

SOURCE: Wyoming Department of Revenue

TABLE 3

City of Rock Springs -- Building Permit Summary

Number of Dwelling Units

<u>YEAR</u>	<u>1 - FAMILY</u>	<u>MULTI - FAMILY</u>	<u>MOBILE HOME</u>	<u>BACHELOR UNITS</u>
1967	12			
1968	16			
1969	46			
1970	68			
1971	73	83	320	
1972	68		117	112
1973	246	38	614	252
(MAY) 1974	46	48	1	

TABLE 4

REVENUES FROM SALES TAX DISTRIBUTED EACH MONTH

	% of Distribution	Sweetwater County	Rock Springs	Green River
DEC. '71	1/2	3,329.48	18,790.88	6,765.67
JAN. '72	1/2	3,090.17	17,440.31	6,279.39
FEB. '72	1/2	2,878.96	16,248.33	5,850.22
MAR. '72	1/2	3,323.86	18,759.26	6,754.28
APR. '72	1/2	2,578.84	14,554.48	5,240.35
MAY '72	1/2	3,379.85	19,075.14	6,868.01
JUNE '72	1/2	3,707.98	20,927.15	7,534.83
JULY '72	1/2	3,175.06	17,919.38	6,451.88
AUG. '72	1/2	4,738.93	26,745.62	9,629.77
SEPT. '72	1/2	3,944.16	22,260.06	8,014.74
OCT. '72	1/2	4,262.75	24,058.18	8,662.16
NOV. '72	1/2	4,451.83	25,125.23	9,046.35
DEC. '72	1/2	3,895.83	21,987.28	7,916.53
JAN. '73	1/2	4,503.71	25,418.09	9,151.79
FEB. '73	1/2	4,343.81	24,515.67	8,826.88
MAR. '73	1/2	4,139.17	23,360.68	8,411.03
APR. '73	1/2	3,879.74	21,896.53	7,883.86
MAY '73	1/2	4,452.11	25,126.84	9,046.93
JUNE '73	1/2	5,169.33	29,174.75	10,504.38
JULY '73	1/2	5,142.24	29,021.89	10,449.34
AUG. '73	1/2	6,361.05	35,900.57	12,926.02
SEPT. '73	1/2	5,258.10	29,675.75	10,684.77
OCT. '73	1/2	6,611.94	37,316.53	13,435.84
NOV. '73	1/2	5,571.79	31,446.10	11,322.18
DEC. '73	1/2	5,556.92	31,362.24	11,291.99
JAN. '74	1/2	7,375.22	41,362.31	14,986.85
FEB. '74	1 1/2	12,743.61	71,922.60	25,895.77
MAR. '74	1 1/2	13,746.80	77,584.31	27,934.27
APR. '74	1 1/2*	24,119.48	136,125.83	49,012.17

* Includes 1st month of Use Tax distribution.

ENROLLMENT BY GRADES
1952-53 to 1973-74

TABLE 5

Year	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
52-53	199	207	171	154	152	152	112	158	163	172	171	143	149	2,103
53-54	220	236	169	168	147	155	158	119	168	168	163	149	130	2,150
54-55	213	203	182	152	170	135	148	169	129	179	167	157	132	2,136
55-56	182	196	168	179	139	149	126	147	159	152	164	153	142	2,056
56-57	201	176	180	147	170	144	150	160	140	184	144	166	134	2,096
57-58	226	175	157	173	153	170	148	156	154	182	177	140	141	2,152
58-59	207	204	147	145	157	149	161	155	150	178	178	171	135	2,137
59-60	240	227	197	173	170	158	164	194	158	193	184	181	169	2,408
60-61	268	244	230	178	181	180	159	183	200	189	184	163	174	2,533
61-62	267	225	204	216	177	177	176	174	179	235	176	175	146	2,527
62-63	285	239	219	216	231	188	196	198	191	255	240	187	168	2,813
63-64	247	249	216	229	220	238	209	199	213	233	246	224	163	2,886
64-65	247	216	214	192	213	204	219	199	203	221	224	223	206	2,781
65-66	261	216	189	203	184	208	196	228	183	239	201	208	204	2,720
66-67	262	240	185	179	195	184	212	217	225	238	228	190	207	2,762
67-68	245	228	228	176	192	211	212	225	242	244	240	220	185	2,848
68-69	278	228	208	218	188	189	211	208	222	280	233	220	205	2,888
69-70	242	225	237	218	217	226	215	189	244	284	239	222	207	2,965
70-71	226	227	239	218	217	226	216	258	267	241	270	254	201	3,060
71-72	270	229	238	254	240	240	241	270	277	275	244	262	242	3,282
72-73	259	255	249	262	277	252	254	320	276	289	266	268	250	3,477
(Sept) 73-74	298	294	291	291	309	332	291	350	339	304	316	271	238	3,924 + 32 spec
(March) 74	341	346	329	332	345	371	318	367	353	306	297	263	234	4,202 + 58 spec

SOURCE: SCHOOL DISTRICT #1, SWEETWATER COUNTY

The employment projections (Table 6) are based on current expectations of industry development. Only those projects currently being planned are included. Such developments as oil shale, coal gasification and liquification, and glass manufacturing, while distinct possibilities for development, were not included because the timing and extent of development could not be determined at this time. As new developments are announced in the future, the employment and population forecasts will be adjusted accordingly.

The projections were arrived at by using a basic/non-basic ratio of 1 to 1.7, except that temporary construction employment was considered to create only 0.5 non-basic jobs.

TABLE #6

PROJECTED EMPLOYMENT - SWEETWATER COUNTY

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1985	1990	1995
MINING	1534	2158	2782	3406	4032	4200	4450	4625	4870	5190	5520	7600	9000	9500
MANUFACT.	222	223	224	225	225	225	225	225	225	225	225	225	225	225
CONSTRUCTION	448	521	594	667	740	764	805	827	859	895	932	1162	1288	1356
(TEMPORARY)	(0)	(250)	(900)	(2800)	(3000)	(2800)	(2600)	(2400)	(2200)	(2000)	(1800)	(250)	(0)	(0)
T.C.U. *	948	1174	1400	1626	1852	1910	2012	2069	2149	2238	2330	2906	3221	3391
(BASIC)	(0)	(0)	(0)	(0)	(75)	(140)	(250)	(300)	(350)	(350)	(350)	(420)	(450)	(450)
TRADE	1554	1826	2098	2370	2648	2731	2878	2958	3073	3200	3332	4156	4606	4849
SERVICE	2256	2618	2980	3242	3704	3820	4024	4138	4298	4472	4660	5812	6442	6782
F.I.R.E **	205	240	270	290	314	324	342	351	365	380	396	494	547	576
AGRICULTURE	230	230	230	230	230	230	230	230	230	230	230	230	230	230
TOTAL	7397	8719	10,884	14,189	16,820	17,144	17,816	18,123	18,619	19,180	19,775	23,255	26,010	27,359

* TRANSPORTATION, COMMUNICATION, & UTILITIES

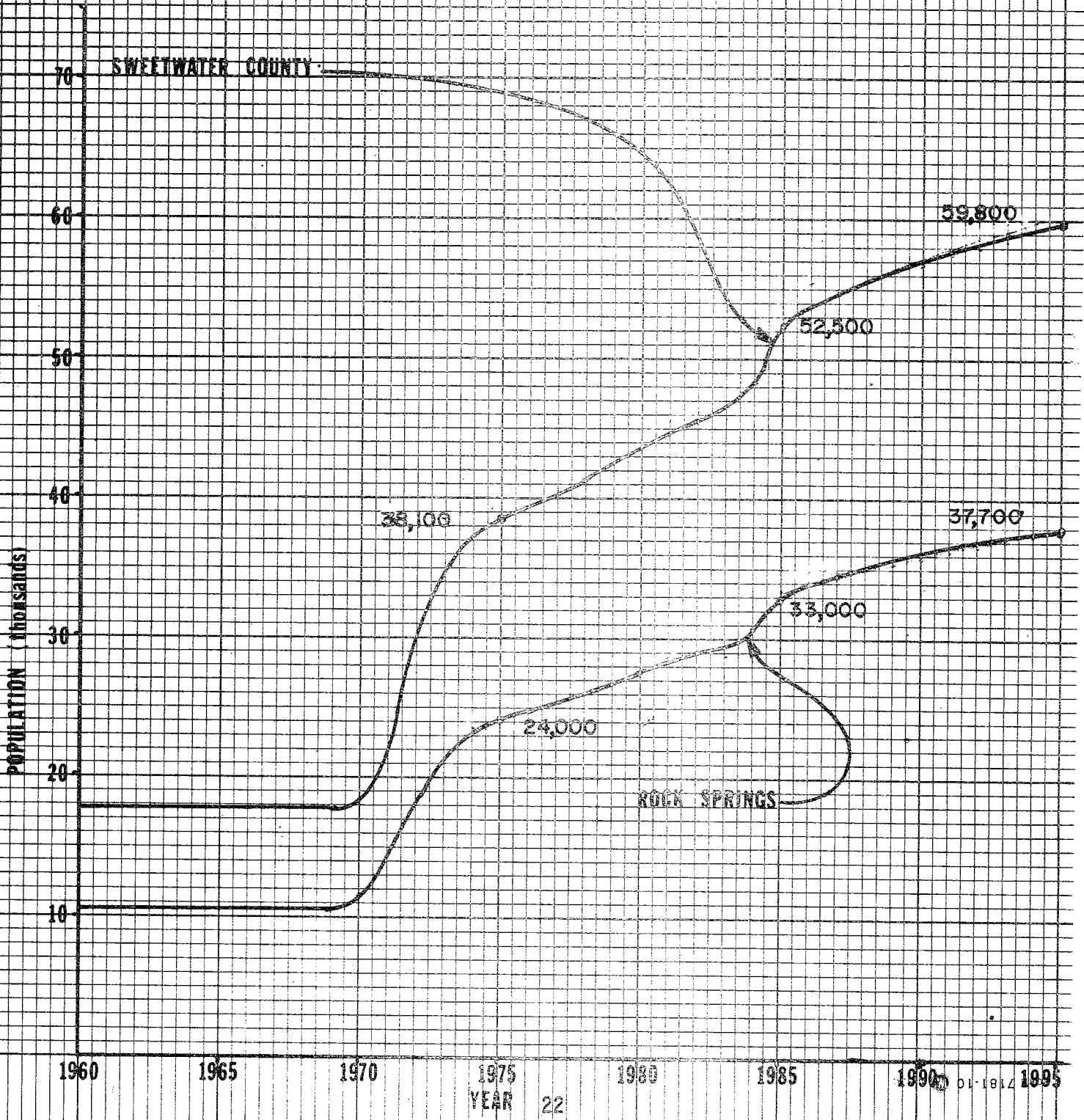
** FINANCE, INSURANCE, & REAL ESTATE

POPULATION PROJECTIONS

The population estimates are based upon the estimated employment. It is assumed that the labor force participation rate is .45. That is 45% of the population is in the labor force. The labor force participation rate was about .40 in 1960 and was .424 in 1970. With the influx of young families and the increased number of women in the work force it is felt that the labor force participation rate is now up to .45. This also corresponds to the estimates of population based upon retail sales and automobile ownership.

The projected population (Graph 2) like the projected employment, is based on current plans for development in the county. Should any new industries locate in the area these projections will be revised.

PROJECTED POPULATION



SUMMARY

Sweetwater County, with an area of over 10,000 square miles, is the largest county in Wyoming, and is in fact larger than 8 states. It is endowed with an abundance of mineral resources.

The economy of the region has grown phenomenally in the past four years and will continue to grow into the next century, as the world demand for these minerals expands.

Economic growth is good in that it provides employment and the community in general prospers. However, it does present a challenge to the communities that must provide services to the added population. Rock Springs' population has doubled in four years, which caused the community's infra-structure (streets, utilities, housing, etc.) to be overloaded. It takes time to plan, engineer, and construct the additional facilities needed. Hopefully, this report, by taking a look at what growth can be expected in the near future, will facilitate the anticipation of growth and planning of needed facilities so that as future growth occurs the needed facilities will be available.

Special thanks should be given to the members of the Wyoming Geological Survey and Department of Economic Planning and Development for the information and help they provided in the preparation of this document. The local industry and business officials were also very helpful.