

**Business Case
Advanced Manufacturing
Cluster**

**Sumner County, TN
45 Minute Drive Time**



**1598 GreenLea Boulevard
Gallatin, TN 37066**

615-206-6624

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Parameters

Industries:

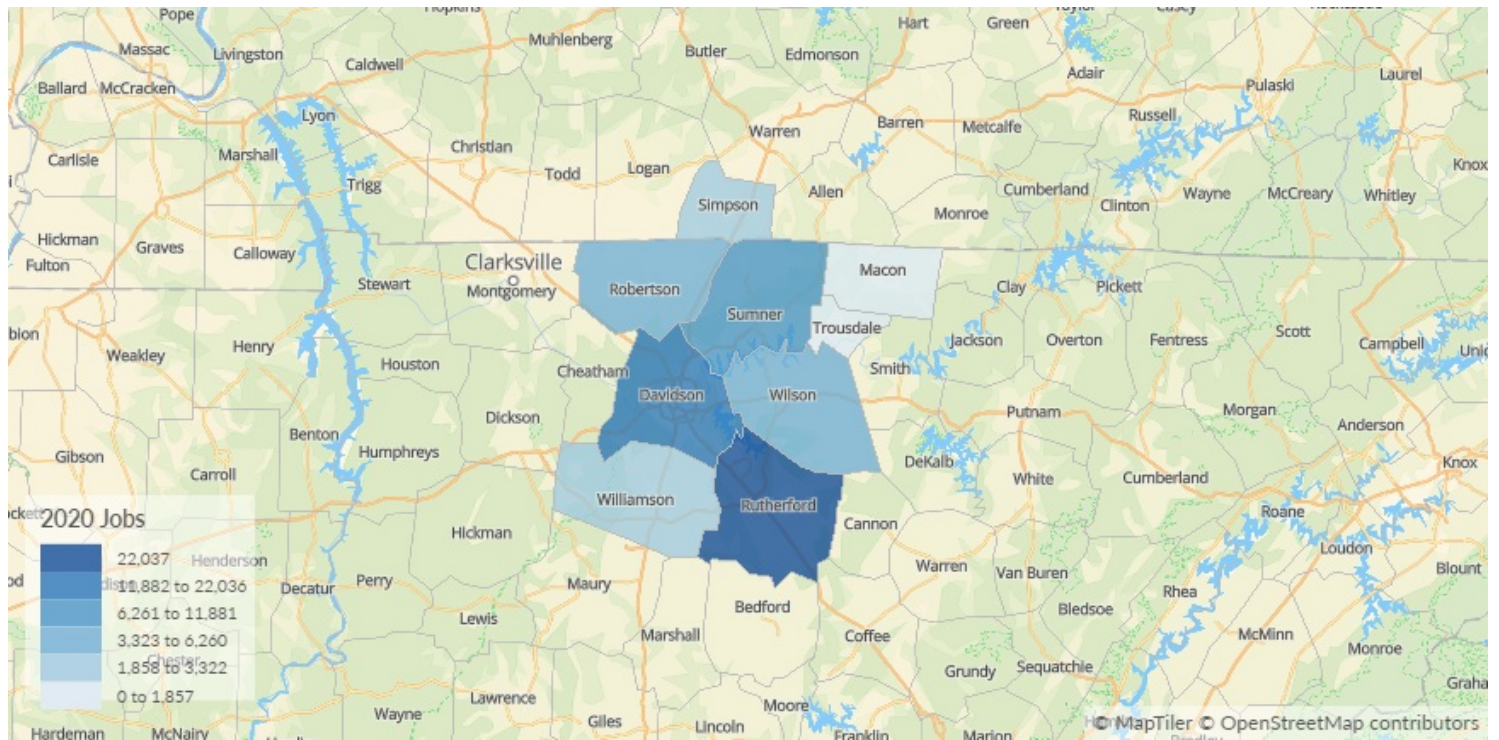
46 items selected. See Appendix A for details.

Regions:

Code	Description	Code	Description
21213	Simpson County, KY	47165	Sumner County, TN
47037	Davidson County, TN	47169	Trousdale County, TN
47111	Macon County, TN	47187	Williamson County, TN
47147	Robertson County, TN	47189	Wilson County, TN
47149	Rutherford County, TN		

Datarun: 2021.1 - QCEW Employees, Non-QCEW Employees, and Self-Employed

46 Manufacturing for 9 Counties vs. Nation

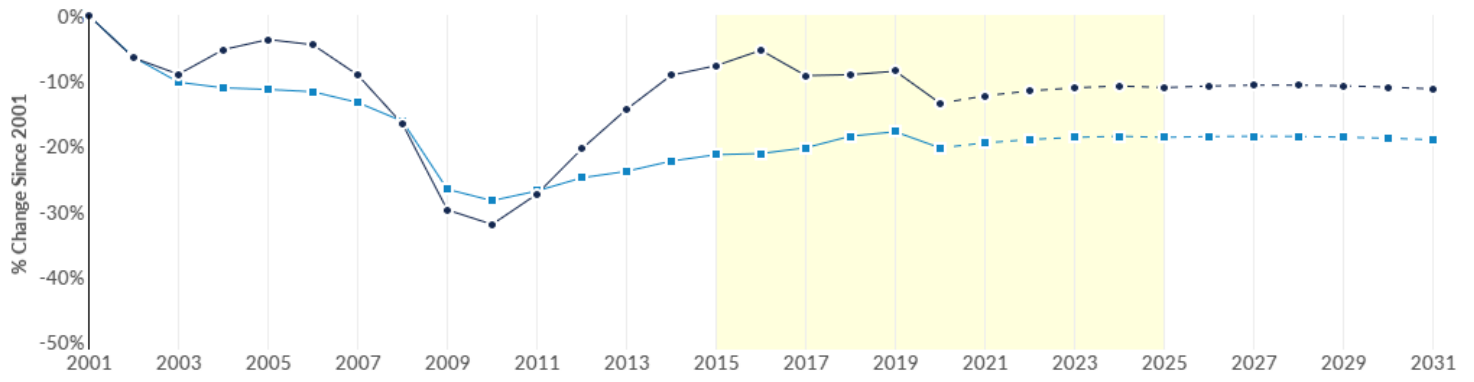


Executive Summary

<p style="text-align: center;">1,269</p> <p style="text-align: center;">Payrolled Business Locations</p> <p>Payrolled business locations increased by 252 over the last 5 years.</p>	<p style="text-align: center;">52,101</p> <p style="text-align: center;">Jobs</p> <p>Jobs decreased by 3,475 over the last 5 years. Projected to increase by 1,447 over the next 5 years.</p>	<p style="text-align: center;">1.01</p> <p style="text-align: center;">Concentration</p> <p>Regional job concentration is 1.01 times the national job concentration.</p>	<p style="text-align: center;">\$77.2K</p> <p style="text-align: center;">Earnings Per Job</p> <p>Regional earnings per job are \$8.8K below the national earnings per job of \$86.0K.</p>
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- Jobs for your selected industries decreased by 3,475 jobs (-6.3%) from 2015-2020, less than the national growth rate of 1.3%. The industries are projected to increase by 1,447 jobs (2.8%) from 2020-2025, outpacing the national growth rate of 2.0%.
- Regional job concentration for your selected industries is 1.01 times the national job concentration. In other words, there are 1% more jobs at your selected industries in this region than we would expect to find in the average region.
- Cost of labor in the region is below average. The regional earnings per job for your selected industries is \$77.2K, which is \$8.8K below the national average of \$86.0K.

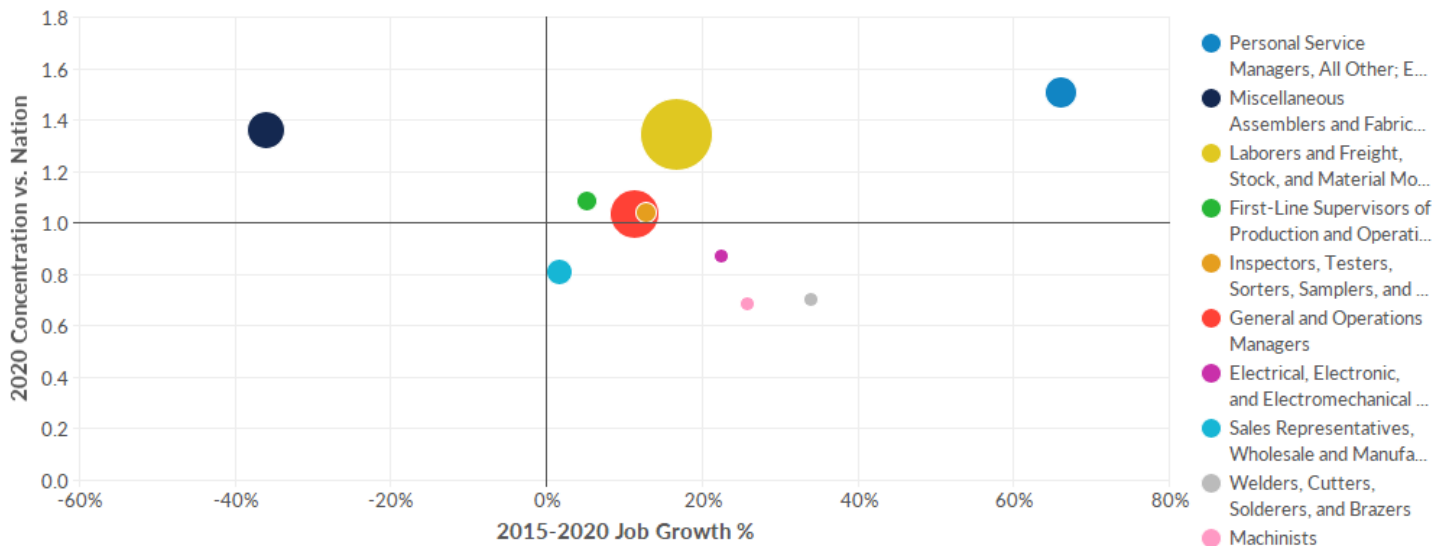
Regional Trends



Region	2015 Jobs	2020 Jobs	2025 Jobs	Change	2015-2020 Growth %	2020-2025 Growth %
● 9 Counties	55,576	52,101	53,548	-2,028	-6.3%	2.8%
■ Nation	8,081,156	8,187,882	8,354,033	272,877	1.3%	2.0%

Workforce Availability

Key occupations for your selected industries have an overall concentration of **1.15**, indicating above average workforce availability. These occupations experienced overall job growth of **5.6%** from 2015-2020, indicating that the regional talent pool is increasing.



SOC	Key Occupation	Concentration	2015 Jobs	2020 Jobs	2025 Jobs	Median Hourly Earnings	Average Hourly Earnings
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1.51	5,453	9,052	9,709	\$32.51/hr	\$38.48/hr
51-2098	Miscellaneous Assemblers and Fabricators	1.36	17,664	11,308	11,136	\$17.44/hr	\$18.47/hr
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1.35	21,989	25,642	28,427	\$14.34/hr	\$14.84/hr
51-1011	First-Line Supervisors of Production and Operating Workers	1.09	4,100	4,316	4,538	\$27.84/hr	\$28.71/hr
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	1.04	3,346	3,770	3,699	\$17.34/hr	\$19.33/hr
11-1021	General and Operations Managers	1.03	14,459	16,084	17,669	\$48.26/hr	\$58.36/hr
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	0.87	1,302	1,595	1,640	\$16.93/hr	\$18.35/hr
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.81	6,994	7,110	7,424	\$23.65/hr	\$30.08/hr
	Total	1.15	78,046	82,437	87,949		\$28.98/hr

51-4121	Welders, Cutters, Solderers, and Brazers	0.70	1,424	1,908	1,987	\$20.03/hr	\$20.51/hr
51-4041	Machinists	0.69	1,315	1,654	1,719	\$19.01/hr	\$20.26/hr
	Total	1.15	78,046	82,437	87,949		\$28.98/hr

Supply Chain Requirements

38%

Satisfied In-Region

38% of the goods and services that your selected industries require to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$581,936,658	13.9%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$522,586,499	65.7%
336370	Motor Vehicle Metal Stamping	\$435,469,880	43.5%
336360	Motor Vehicle Seating and Interior Trim Manufacturing	\$394,929,065	45.3%
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	\$359,435,846	17.1%
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing	\$302,303,718	15.1%
336390	Other Motor Vehicle Parts Manufacturing	\$293,364,508	88.7%
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	\$249,808,120	38.6%
325211	Plastics Material and Resin Manufacturing	\$228,667,476	16.2%
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	\$210,552,499	53.4%

Appendix A - Industries

Code	Description
3111	Animal Food Manufacturing
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3219	Other Wood Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3254	Pharmaceutical and Medicine Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3313	Alumina and Aluminum Production and Processing
3315	Foundries
3321	Forging and Stamping
3322	Cutlery and Handtool Manufacturing
3323	Architectural and Structural Metals Manufacturing

Code	Description
3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities
3329	Other Fabricated Metal Product Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3332	Industrial Machinery Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3335	Metalworking Machinery Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3339	Other General Purpose Machinery Manufacturing
3341	Computer and Peripheral Equipment Manufacturing
3351	Electric Lighting Equipment Manufacturing
3352	Household Appliance Manufacturing
3353	Electrical Equipment Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
3363	Motor Vehicle Parts Manufacturing
3369	Other Transportation Equipment Manufacturing

3324	Boiler, Tank, and Shipping Container Manufacturing
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3391	Medical Equipment and Supplies Manufacturing
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3399	Other Miscellaneous Manufacturing
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Appendix B - Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Occupation Data

Emsi occupation employment data are based on final Emsi industry data and final Emsi staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates also affected by county-level Emsi earnings by industry.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

State Data Sources

This report uses state data from the following agencies: Arizona Department of Administration, Office of Employment and Population Statistics; Arkansas Department of Workforce Services; California Labor Market Information Department; Colorado Department of Labor and Employment; Connecticut did not provide us with a data source; Delaware Office of Occupational and Labor Market Information, Delaware Wages 2004; District of Columbia Department of Employment Services; Florida Department of Economic Opportunity; Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit; Hawaii Department of Labor and Industrial Relations, Research and Statistics Office; Idaho Department of Labor; Illinois Department of Employment Security, Employment Projections; Indiana Department of Workforce Development; Iowa Workforce Development; Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Kentucky Office of Employment and Training; Louisiana Department of Labor; Maine did not provide us with a data source; Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information; Massachusetts Executive Office of Labor and Workforce Development; Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives; Minnesota Department of Employment and Economic Development; Mississippi Department of Employment Security; Missouri Department of Economic Development; Montana Department of Labor and Industry, Research and Analysis Bureau; Nebraska Workforce Development; Nevada Department of Employment, Training and Rehabilitation, Information Development and Processing Division, Research and Analysis Bureau; New Hampshire Department of Employment Security; New Jersey Department of Labor and Workforce Development; New Mexico Department of Labor, Bureau of Economic Research and Analysis; New York Department of Labor, Division of Research and Statistics; North Carolina Department of Commerce, Labor and Economic Analysis Division; North Dakota Job Service, Labor Market Information Center; Ohio Department of Job and Family Services, Labor Market

Information Division; Oklahoma Employment Security Commission; Oregon Employment Department, Oregon Labor Market Information System; Pennsylvania Department of Labor and Industry, Center for Workforce Information and Analysis; Rhode Island did not provide us with a data source; South Carolina Employment Security Commission, Labor Market Information Department; South Dakota Department of Labor, Labor Market Information Division; Tennessee Department of Labor and Workforce Development, Research and Statistics Division; Texas Workforce Commission; Utah Department of Workforce Services; Vermont did not provide us with a data source; Virginia Employment Commission, Economic Information Services; Washington State Employment Security Department, Labor Market and Economic Analysis Branch; West Virginia Bureau of Employment Programs, Research Information & Analysis Division; Wisconsin Department of Workforce Development, Bureau of Workforce Information; Wyoming Department of Employment, Research and Planning