

Business Case Automotive Manufacturing Cluster

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



**1598 GreenLea Boulevard
Gallatin, TN 37066**

615-206-6624

www.forwardsumner.org

Parameters

Industries:

Code	Description
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3361	Motor Vehicle Manufacturing

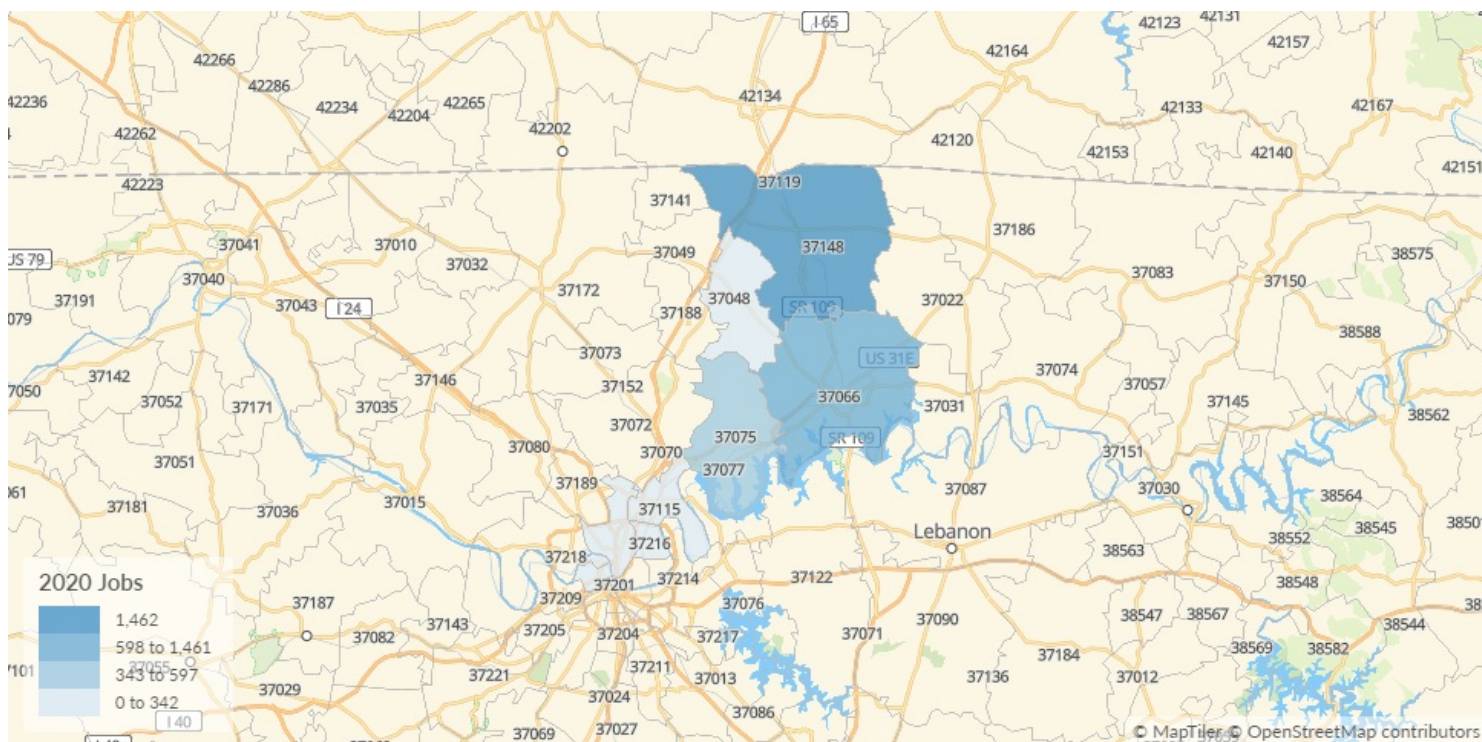
Code	Description
3363	Motor Vehicle Parts Manufacturing
3369	Other Transportation Equipment Manufacturing

Regions:

25 items selected. See Appendix A for details.

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

5 Manufacturing for 25 Tennessee ZIPs vs. Nation

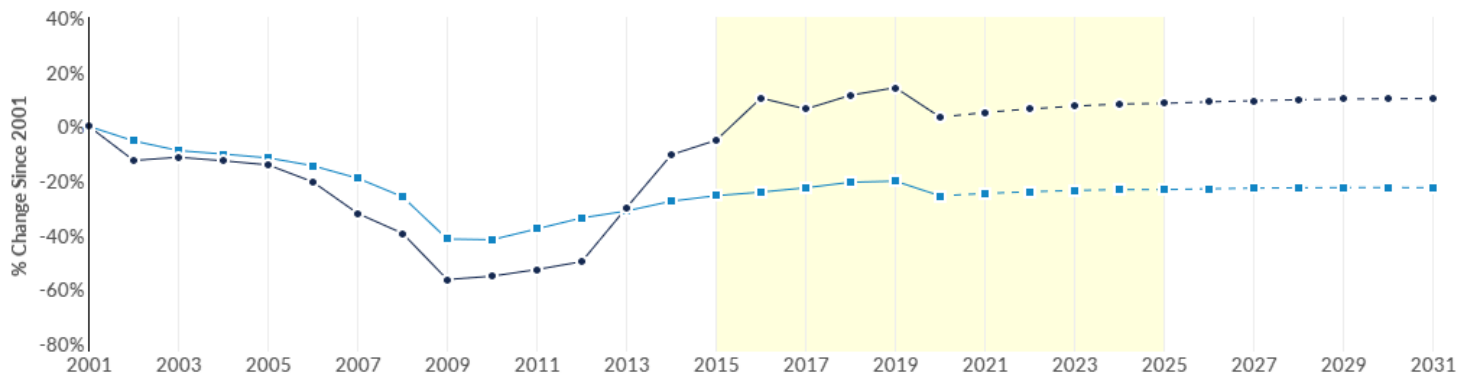


Executive Summary

<p style="text-align: center;">2,413 Jobs</p> <p>Jobs increased by 198 over the last 5 years. Projected to increase by 118 over the next 5 years.</p>	<p style="text-align: center;">2.51 Concentration</p> <p>Regional job concentration is 2.51 times the national job concentration.</p>	<p style="text-align: center;">\$68.8K Earnings Per Job</p> <p>Regional earnings per job are \$15.3K below the national earnings per job of \$84.1K.</p>
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- Jobs for your selected industries increased by 198 jobs (8.9%) from 2015-2020, outpacing the national growth rate of -0.1%. The industries are projected to increase by 118 jobs (4.9%) from 2020-2025, outpacing the national growth rate of 3.1%.
- Regional job concentration for your selected industries is 2.51 times the national job concentration. In other words, there are 151% 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 \$68.8K, which is \$15.3K below the national average of \$84.1K.

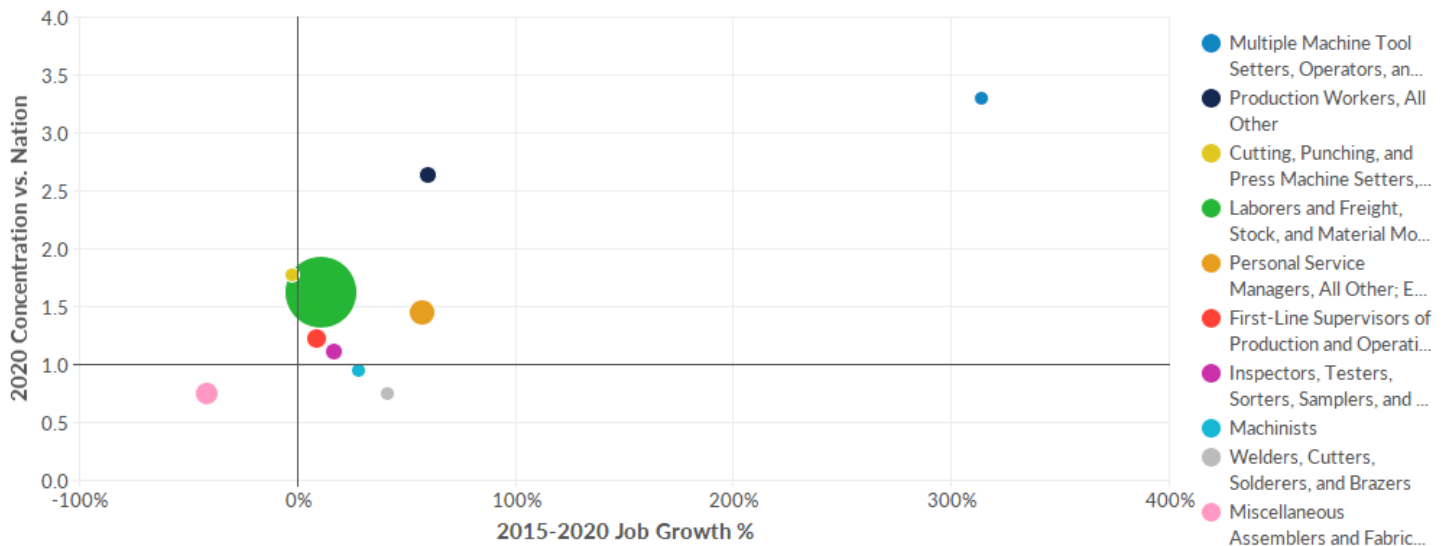
Regional Trends



Region	2015 Jobs	2020 Jobs	2025 Jobs	Change	2015-2020 Growth %	2020-2025 Growth %
● 25 Tennessee ZIPs	2,215	2,413	2,532	317	8.9%	4.9%
■ Nation	954,833	954,037	983,671	28,838	-0.1%	3.1%

Workforce Availability

Key occupations for your selected industries have an overall concentration of 1.32, indicating above average workforce availability. These occupations experienced overall job growth of 12.5% 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
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	3.30	118	488	504	\$17.12/hr	\$18.24/hr
51-9199	Production Workers, All Other	2.64	401	640	662	\$12.55/hr	\$13.32/hr
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	1.77	343	336	328	\$17.46/hr	\$17.92/hr
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1.62	4,458	4,942	5,324	\$14.24/hr	\$14.71/hr
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1.45	886	1,393	1,464	\$31.71/hr	\$37.82/hr
51-1011	First-Line Supervisors of Production and Operating Workers	1.23	720	782	822	\$27.98/hr	\$28.78/hr
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	1.11	552	645	627	\$17.41/hr	\$19.42/hr
51-4041	Machinists	0.95	286	366	366	\$18.79/hr	\$20.05/hr
	Total	1.32	9,708	10,923	11,431		\$19.83/hr

51-4121	Welders, Cutters, Solderers, and Brazers	0.76	233	329	334	\$20.35/hr	\$20.89/hr
51-2098	Miscellaneous Assemblers and Fabricators	0.75	1,711	1,003	1,000	\$17.43/hr	\$18.51/hr
	Total	1.32	9,708	10,923	11,431		\$19.83/hr

Supply Chain Requirements

20%

Satisfied In-Region

20% 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	\$170,194,483	8.7%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$40,909,137	7.2%
336370	Motor Vehicle Metal Stamping	\$22,927,295	59.3%
326199	All Other Plastics Product Manufacturing	\$16,204,671	16.0%
332710	Machine Shops	\$15,289,533	6.5%
336390	Other Motor Vehicle Parts Manufacturing	\$14,262,791	99.2%
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	\$13,245,032	1.0%
331221	Rolled Steel Shape Manufacturing	\$10,395,357	41.9%
334413	Semiconductor and Related Device Manufacturing	\$10,219,967	0.1%
484121	General Freight Trucking, Long-Distance, Truckload	\$8,139,868	13.3%

Appendix A - Regions

Code	Description
37048	Cottontown, TN (in Sumner county)
37066	Gallatin, TN (in Sumner county)
37070	Goodlettsville, TN (in Davidson county)
37075	Hendersonville, TN (in Sumner county)
37077	Hendersonville, TN (in Sumner county)
37115	Madison, TN (in Davidson county)
37116	Madison, TN (in Davidson county)
37148	Portland, TN (in Sumner county)
37201	Nashville, TN (in Davidson county)
37202	Nashville, TN (in Davidson county)
37207	Nashville, TN (in Davidson county)
37208	Nashville, TN (in Davidson county)
37213	Nashville, TN (in Davidson county)

Code	Description
37216	Nashville, TN (in Davidson county)
37219	Nashville, TN (in Davidson county)
37224	Nashville, TN (in Davidson county)
37227	Nashville, TN (in Davidson county)
37228	Nashville, TN (in Davidson county)
37234	Nashville, TN (in Davidson county)
37238	Nashville, TN (in Davidson county)
37242	Nashville, TN (in Davidson county)
37243	Nashville, TN (in Davidson county)
37244	Nashville, TN (in Davidson county)
37246	Nashville, TN (in Davidson county)
37250	Nashville, TN (in Davidson county)

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: Alaska Department of Labor and Workforce Development; 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