

**Business Case  
Medical Device  
Manufacturing Cluster**

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



**1598 GreenLea Boulevard  
Gallatin, TN 37066**

**615-206-6624**

**[www.forwardsumner.org](http://www.forwardsumner.org)**

# Parameters

## Industries:

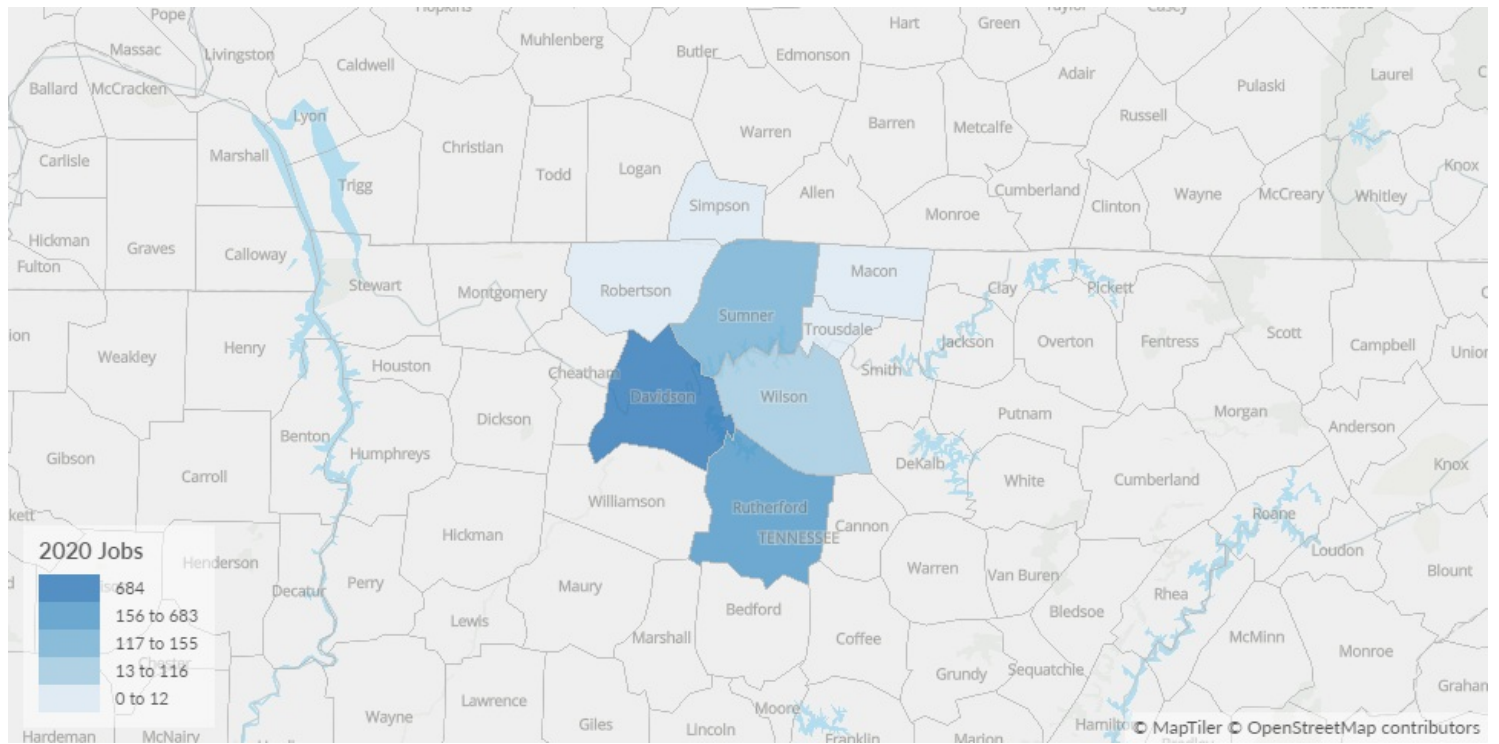
Code	Description
3391	Medical Equipment and Supplies Manufacturing

## Regions:

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

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

# Medical Equipment and Supplies Manufacturing for Sumner 45 DT vs. Nation

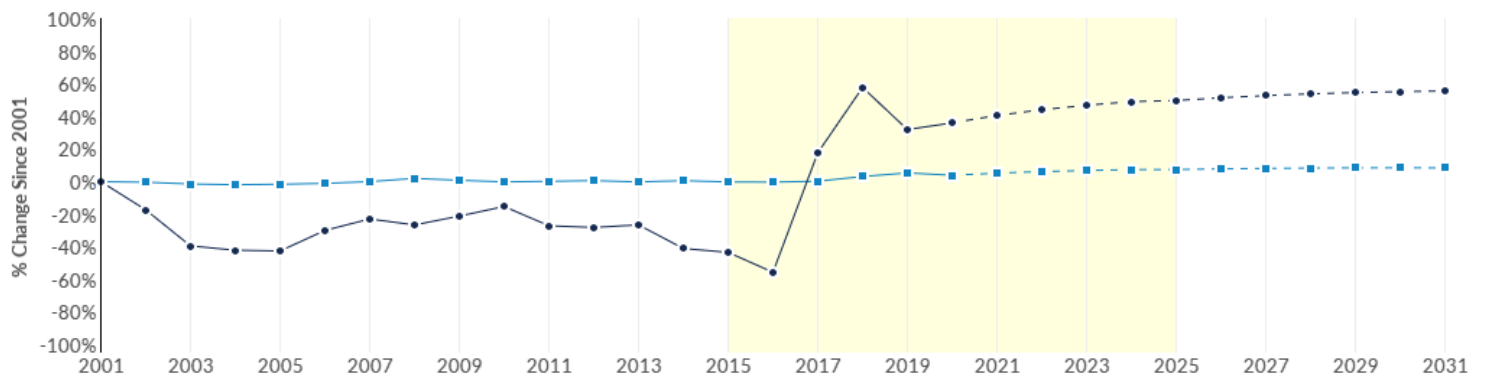


# Executive Summary

<p>50</p> <p><b>Payrolled Business Locations</b></p> <p>Payrolled business locations increased by 14 over the last 5 years.</p>	<p>970</p> <p><b>Jobs</b></p> <p>Jobs increased by 567 over the last 5 years. Projected to increase by 98 over the next 5 years.</p>	<p>0.55</p> <p><b>Concentration</b></p> <p>Regional job concentration is 0.55 times the national job concentration.</p>	<p>\$68.2K</p> <p><b>Earnings Per Job</b></p> <p>Regional earnings per job are \$37.2K below the national earnings per job of \$105.3K.</p>
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- Jobs for Medical Equipment and Supplies Manufacturing increased by 567 jobs (140.3%) from 2015-2020, outpacing the national growth rate of 4.1%. The industry is projected to increase by 98 jobs (10.1%) from 2020-2025, outpacing the national growth rate of 3.4%.
- Regional job concentration for Medical Equipment and Supplies Manufacturing is 0.55 times the national job concentration. In other words, there are 45% fewer jobs at Medical Equipment and Supplies Manufacturing 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 Medical Equipment and Supplies Manufacturing is \$68.2K, which is \$37.2K below the national average of \$105.3K.

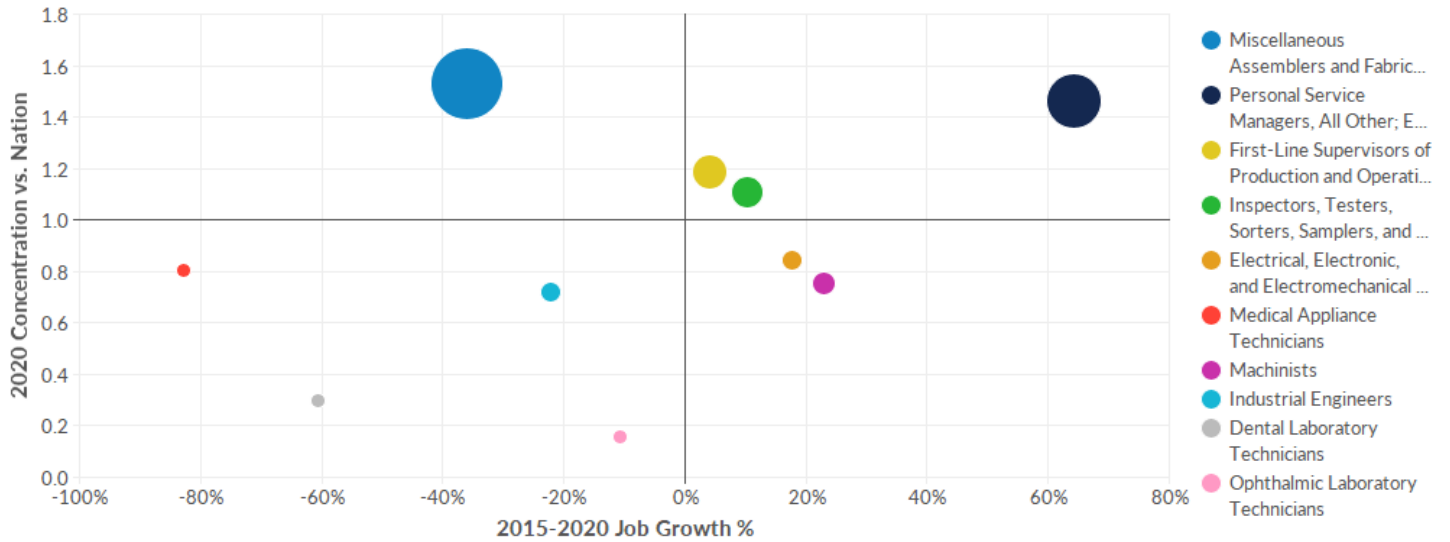
## Regional Trends



Region	2015 Jobs	2020 Jobs	2025 Jobs	Change	2015-2020 Growth %	2020-2025 Growth %
● Sumner 45 DT	404	970	1,068	664	140.1%	10.1%
■ Nation	315,912	328,977	340,001	24,089	4.1%	3.4%

# Workforce Availability

Key occupations for Medical Equipment and Supplies Manufacturing have an overall concentration of **0.84**, indicating below average workforce availability. These occupations experienced overall job growth of **-8.9%** from 2015-2020, indicating that the regional talent pool is decreasing.



SOC	Key Occupation	Concentration	2015 Jobs	2020 Jobs	2025 Jobs	Median Hourly Earnings	Average Hourly Earnings
51-2098	Miscellaneous Assemblers and Fabricators	1.53	16,818	10,777	10,529	\$17.34/hr	\$18.36/hr
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1.46	4,521	7,421	7,888	\$32.11/hr	\$38.13/hr
51-1011	First-Line Supervisors of Production and Operating Workers	1.19	3,834	3,991	4,156	\$27.72/hr	\$28.59/hr
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	1.11	3,083	3,403	3,291	\$17.13/hr	\$19.08/hr
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	0.84	1,115	1,312	1,301	\$16.84/hr	\$18.25/hr
51-9082	Medical Appliance Technicians	0.80	381	66	76	\$15.83/hr	\$16.34/hr
51-4041	Machinists	0.75	1,248	1,534	1,578	\$18.85/hr	\$20.10/hr
17-2112	Industrial Engineers	0.72	1,450	1,129	1,236	\$38.80/hr	\$41.06/hr
	Total	0.84	32,631	29,720	30,155		\$25.70/hr

51-9081	Dental Laboratory Technicians	0.30	152	60	67	\$17.64/hr	\$21.68/hr
51-9083	Ophthalmic Laboratory Technicians	0.16	29	26	33	\$18.61/hr	\$19.15/hr
	Total	0.84	32,631	29,720	30,155		\$25.70/hr

## Supply Chain Requirements

45%

### Satisfied In-Region

45% of the goods and services that Medical Equipment and Supplies Manufacturing require to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
551114	Corporate, Subsidiary, and Regional Managing Offices	\$3,559,127	75.2%
339114	Dental Equipment and Supplies Manufacturing	\$2,396,415	0.9%
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$2,094,642	22.8%
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	\$1,899,719	36.4%
541110	Offices of Lawyers	\$1,535,690	64.8%
339113	Surgical Appliance and Supplies Manufacturing	\$1,213,825	11.9%
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	\$1,005,113	0.0%
326199	All Other Plastics Product Manufacturing	\$987,274	14.9%
541990	All Other Professional, Scientific, and Technical Services	\$959,968	84.0%
325211	Plastics Material and Resin Manufacturing	\$887,235	18.6%

# Appendix A - 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