

# Business Case

Emsi Q2 2017 Data Set

May 2017

**Joint Development Authority of Jeff Davis County, Hazlehurst & Denton, Georgia**  
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# Parameters

## Industries

54 items selected. See Appendix A for details.

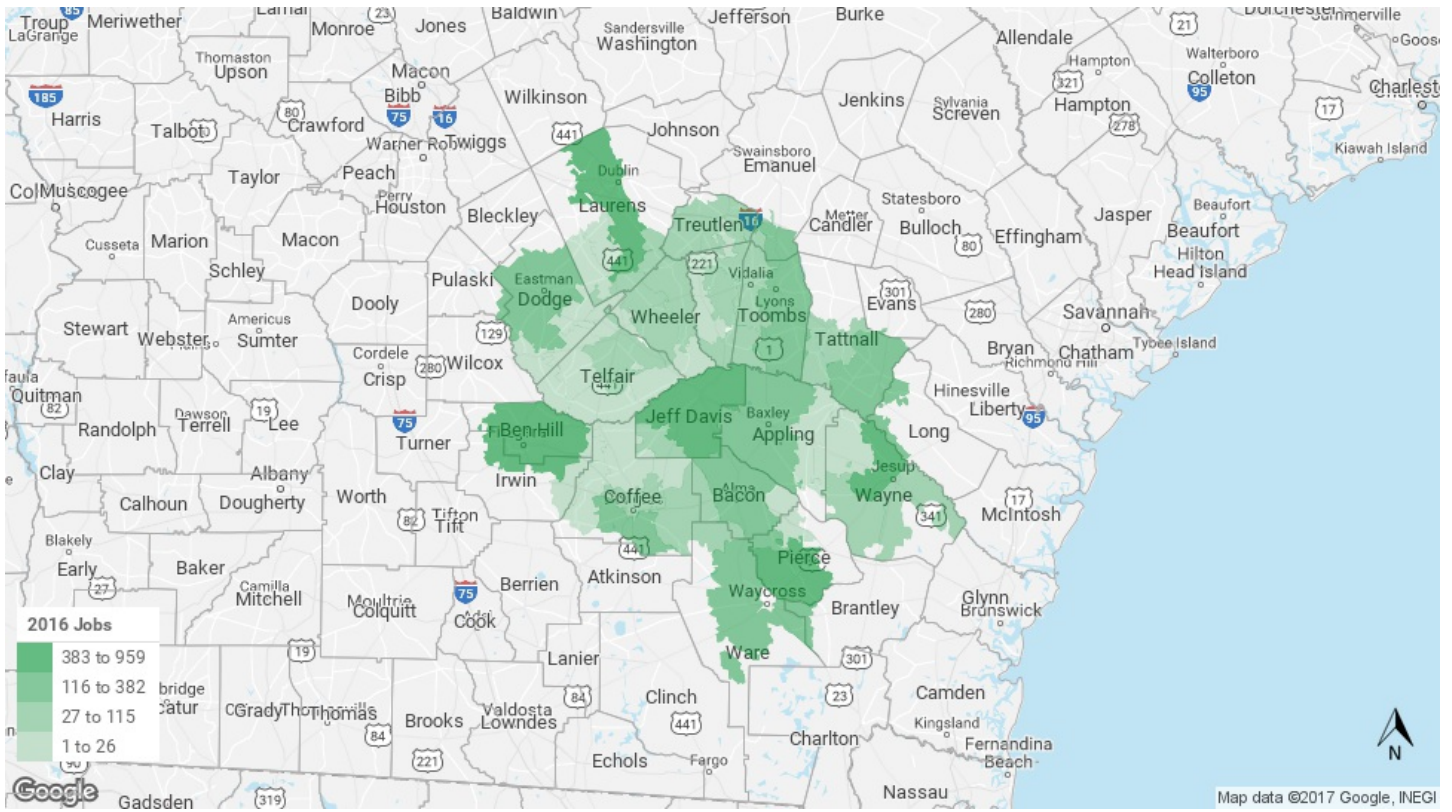
## Regions

48 items selected. See Appendix B for details.

## Datarun

2017.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# Purdue: Forest And Wood Products for 48 Georgia ZIPs vs. Nation



## Executive Summary

5,572

Jobs

Jobs **increased by 173** over the last 5 years. Projected **to increase by 84** over the next 5 years.

3.46

Concentration

Regional job concentration is **3.46 times** the national job concentration.

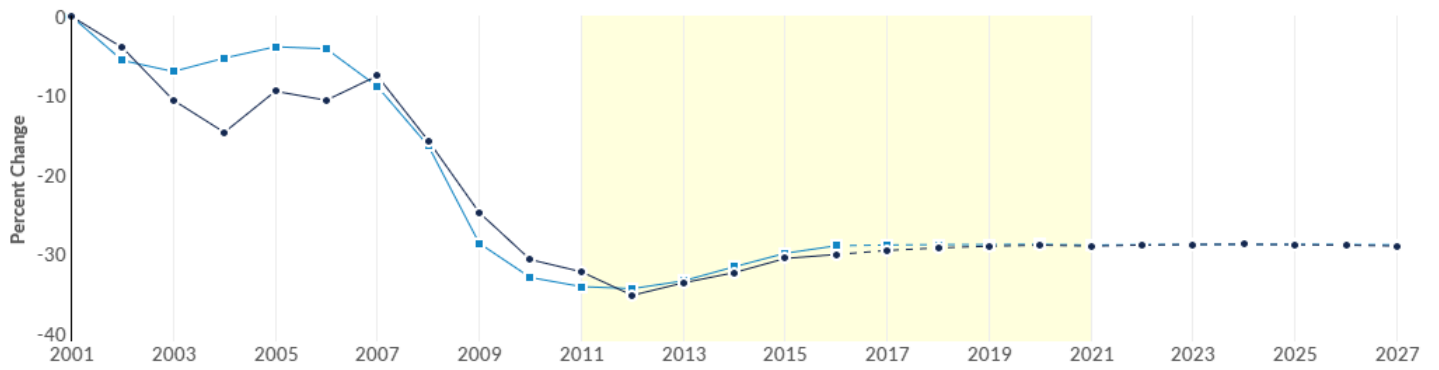
\$55.6K

Earnings Per Job

Regional earnings per job are **\$1.2K below** the national earnings per job of \$56.7K.

- Jobs for Purdue: Forest And Wood Products increased by 173 jobs (3.2%) from 2011-2016, less than the national growth rate of 7.8%. The industries are projected to increase by 84 jobs (1.5%) from 2016-2021, outpacing the national growth rate of 0.1%.
- Regional job concentration for Purdue: Forest And Wood Products is 3.46 times the national job concentration. In other words, there are 246% more jobs at Purdue: Forest And Wood Products 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 Purdue: Forest And Wood Products is \$55.6K, which is \$1.2K below the national average of \$56.7K.

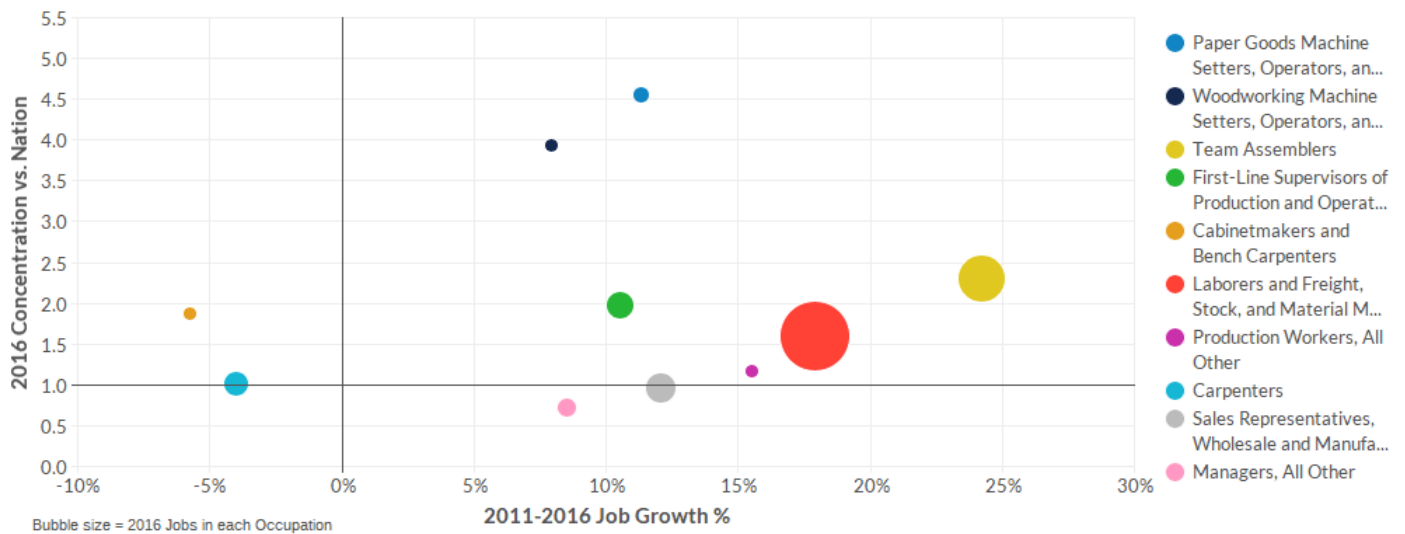
## Regional Trends



Region	2011 Jobs	2016 Jobs	2021 Jobs	Change	2011-2016 Growth %	2016-2021 Growth %
● 48 Georgia ZIPs	5,399	5,572	5,656	257	3.2%	1.5%
■ Nation	2,145,934	2,313,460	2,316,484	170,550	7.8%	0.1%

# Workforce Availability

Key occupations for Purdue: Forest And Wood Products have an overall concentration of 1.78, indicating above average workforce availability. These occupations experienced overall job growth of 14.0% from 2011-2016, indicating that the regional talent pool is increasing.



SOC	Key Occupation	Concentration	2011 Jobs	2016 Jobs	2021 Jobs	Median Hourly Earnings	Average Hourly Earnings
51-9196	Paper Goods Machine Setters, Operators, and Tenders	4.56	260	290	317	\$18.72/hr	\$17.52/hr
51-7042	Woodworking Machine Setters, Operators, and Tenders, Except Sawing	3.94	196	212	210	\$11.55/hr	\$12.42/hr
51-2092	Team Assemblers	2.30	1,464	1,818	1,916	\$12.25/hr	\$12.70/hr
51-1011	First-Line Supervisors of Production and Operating Workers	1.98	766	846	876	\$23.35/hr	\$26.24/hr
51-7011	Cabinetmakers and Bench Carpenters	1.87	148	139	144	\$13.20/hr	\$13.37/hr
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1.60	2,455	2,895	3,173	\$10.78/hr	\$11.70/hr
51-9199	Production Workers, All Other	1.17	187	215	244	\$13.07/hr	\$14.24/hr
47-2031	Carpenters	1.02	762	731	773	\$14.89/hr	\$15.10/hr
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.96	885	992	1,113	\$18.72/hr	\$21.96/hr
11-9199	Managers, All Other	0.72	364	395	416	\$25.35/hr	\$26.82/hr
	<b>Total</b>	<b>1.78</b>	<b>7,486</b>	<b>8,533</b>	<b>9,182</b>	<b>\$14.68/hr</b>	<b>\$15.85/hr</b>

## Supply Chain Requirements

25%

Satisfied In-Region

25% of the goods and services that the selected Industries requires to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
321113	Sawmills *	\$123,406,669	39.2%
113310	Logging *	\$74,285,502	35.9%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$45,713,431	15.2%
482110	Rail transportation	\$23,219,657	29.5%
325180	Other Basic Inorganic Chemical Manufacturing	\$22,238,905	2.4%
115115	Farm Labor Contractors and Crew Leaders	\$21,792,785	37.3%
221210	Natural Gas Distribution	\$21,242,439	5.1%
425120	Wholesale Trade Agents and Brokers	\$19,614,295	1.5%
322110	Pulp Mills *	\$17,072,826	93.2%
324110	Petroleum Refineries	\$16,846,777	0.2%

\*Businesses in your selected industries purchase goods and/or services from other businesses in the industries.

# Appendix A - Industries

Code	Description
113110	Timber Tract Operations
113210	Forest Nurseries and Gathering of Forest Products
113310	Logging
115310	Support Activities for Forestry
238130	Framing Contractors
238160	Roofing Contractors
238170	Siding Contractors
238330	Flooring Contractors
238350	Finish Carpentry Contractors
321113	Sawmills
321114	Wood Preservation
321211	Hardwood Veneer and Plywood Manufacturing
321212	Softwood Veneer and Plywood Manufacturing
321213	Engineered Wood Member (except Truss) Manufacturing
321214	Truss Manufacturing
321219	Reconstituted Wood Product Manufacturing
321911	Wood Window and Door Manufacturing
321912	Cut Stock, Resawing Lumber, and Planing
321918	Other Millwork (including Flooring)
321920	Wood Container and Pallet Manufacturing
321991	Manufactured Home (Mobile Home) Manufacturing
321992	Prefabricated Wood Building Manufacturing
321999	All Other Miscellaneous Wood Product Manufacturing
322110	Pulp Mills
322121	Paper (except Newsprint) Mills
322122	Newsprint Mills
322130	Paperboard Mills
322211	Corrugated and Solid Fiber Box Manufacturing
322212	Folding Paperboard Box Manufacturing

Code	Description
322219	Other Paperboard Container Manufacturing
322220	Paper Bag and Coated and Treated Paper Manufacturing
322230	Stationery Product Manufacturing
322291	Sanitary Paper Product Manufacturing
322299	All Other Converted Paper Product Manufacturing
323117	Books Printing
325194	Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing
325510	Paint and Coating Manufacturing
325520	Adhesive Manufacturing
327910	Abrasive Product Manufacturing
332216	Saw Blade and Handtool Manufacturing
333243	Sawmill, Woodworking, and Paper Machinery Manufacturing
333991	Power-Driven Handtool Manufacturing
337110	Wood Kitchen Cabinet and Countertop Manufacturing
337121	Upholstered Household Furniture Manufacturing
337122	Nonupholstered Wood Household Furniture Manufacturing
337127	Institutional Furniture Manufacturing
337211	Wood Office Furniture Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
337215	Showcase, Partition, Shelving, and Locker Manufacturing
337920	Blind and Shade Manufacturing
339992	Musical Instrument Manufacturing
339995	Burial Casket Manufacturing
423210	Furniture Merchant Wholesalers
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers



# Appendix B - Regions

Code	Description
30410	Ailey, GA (in Montgomery county)
30411	Alamo, GA (in Wheeler county)
30412	Alston, GA (in Montgomery county)
30427	Glennville, GA (in Tattnall county)
30428	Glenwood, GA (in Wheeler county)
30436	Lyons, GA (in Toombs county)
30445	Mount Vernon, GA (in Montgomery county)
30453	Reidsville, GA (in Tattnall county)
30457	Soperton, GA (in Treutlen county)
30470	Tarrytown, GA (in Montgomery county)
30473	Uvalda, GA (in Montgomery county)
30474	Vidalia, GA (in Toombs county)
30475	Vidalia, GA (in Toombs county)
31009	Cadwell, GA (in Laurens county)
31011	Chauncey, GA (in Dodge county)
31021	Dublin, GA (in Laurens county)
31023	Eastman, GA (in Dodge county)
31037	Mc Rae Helena, GA (in Telfair county)
31055	Mc Rae Helena, GA (in Telfair county)
31060	Milan, GA (in Dodge county)
31075	Rentz, GA (in Laurens county)
31077	Rhine, GA (in Dodge county)
31083	Scotland, GA (in Telfair county)
31503	Waycross, GA (in Ware county)
31510	Alma, GA (in Bacon county)
31512	Ambrose, GA (in Coffee county)
31513	Baxley, GA (in Appling county)
31515	Baxley, GA (in Appling county)
31516	Blackshear, GA (in Pierce county)

Code	Description
31518	Bristol, GA (in Pierce county)
31519	Broxton, GA (in Coffee county)
31532	Denton, GA (in Jeff Davis county)
31533	Douglas, GA (in Coffee county)
31534	Douglas, GA (in Coffee county)
31535	Douglas, GA (in Coffee county)
31539	Hazlehurst, GA (in Jeff Davis county)
31544	Jacksonville, GA (in Telfair county)
31545	Jesup, GA (in Wayne county)
31546	Jesup, GA (in Wayne county)
31549	Lumber City, GA (in Telfair county)
31551	Mershon, GA (in Pierce county)
31554	Nicholls, GA (in Coffee county)
31555	Odum, GA (in Wayne county)
31560	Screven, GA (in Wayne county)
31563	Surrency, GA (in Appling county)
31567	West Green, GA (in Coffee county)
31750	Fitzgerald, GA (in Ben Hill county)
31798	Wray, GA (in Irwin county)

# Appendix C - 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: Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit