

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

33 items selected. See Appendix A for details.

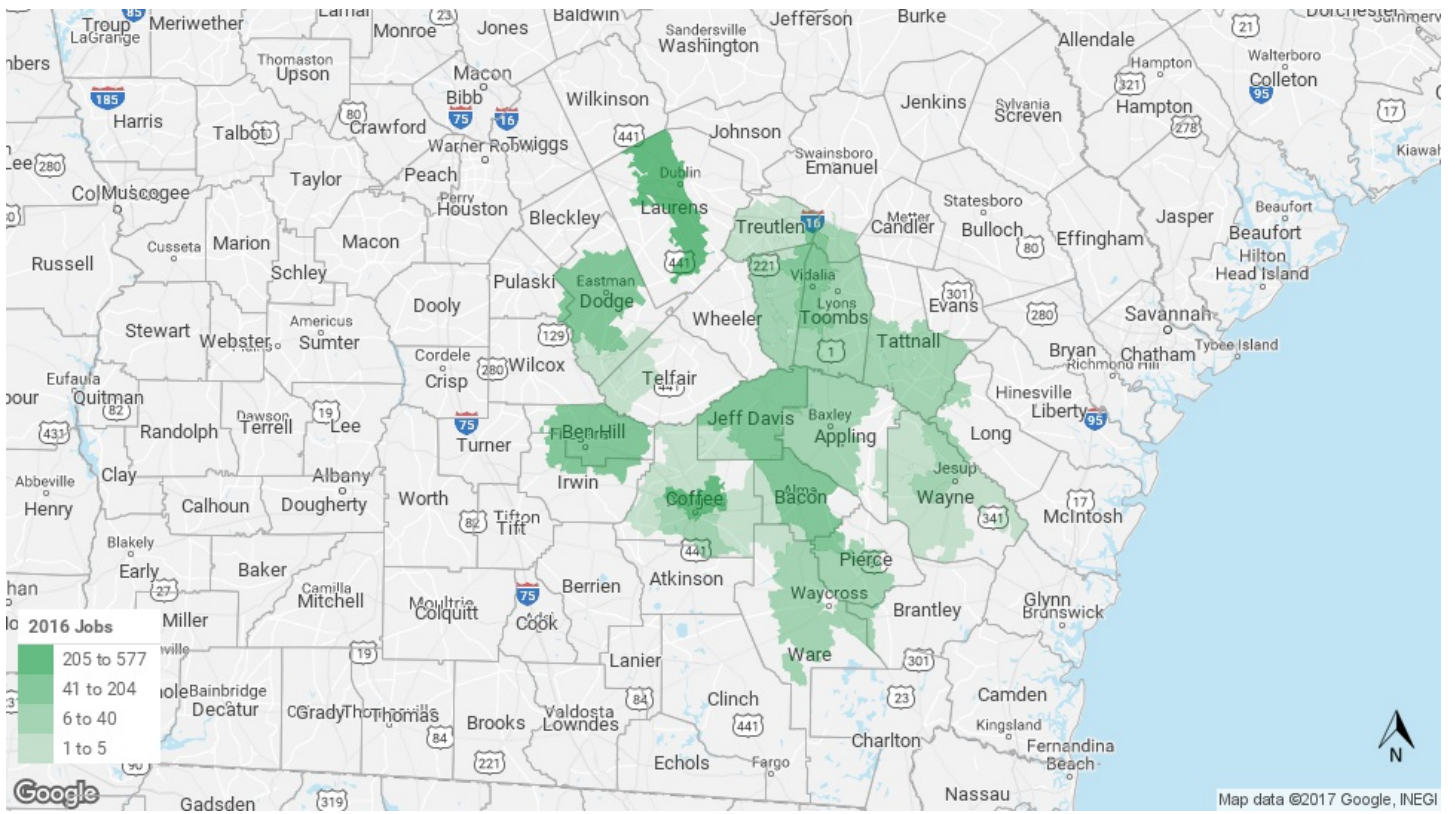
Regions

48 items selected. See Appendix B for details.

Datarun

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

Purdue: Fabricated Metal Product Mfg for 48 Georgia ZIPs vs. Nation



Executive Summary

1,648

Jobs

Jobs increased by 224 over the last 5 years. Projected to increase by 132 over the next 5 years.

1.69

Concentration

Regional job concentration is 1.69 times the national job concentration.

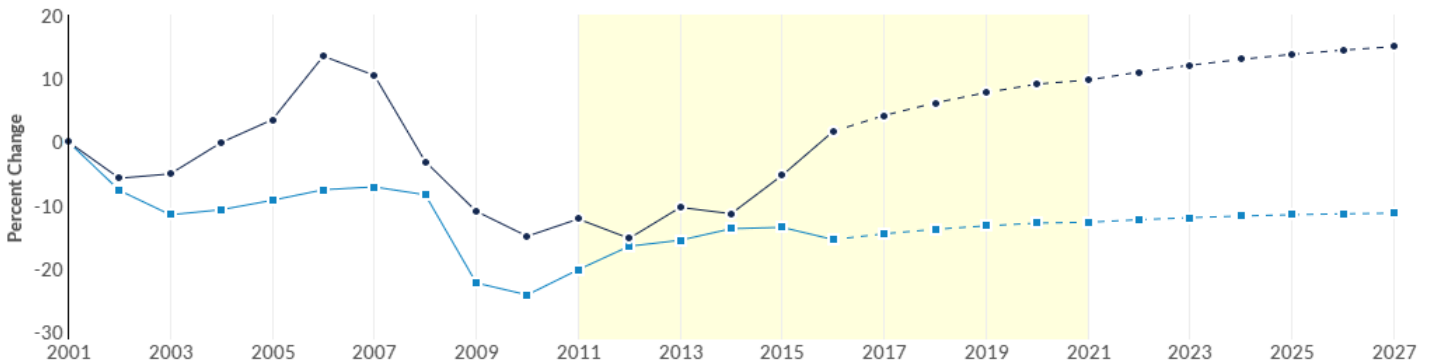
\$52.0K

Earnings Per Job

Regional earnings per job are \$14.0K below the national earnings per job of \$66.0K.

- Jobs for Purdue: Fabricated Metal Product Mfg increased by 224 jobs (15.8%) from 2011-2016, outpacing the national growth rate of 6.0%. The industries are projected to increase by 132 jobs (8.0%) from 2016-2021, outpacing the national growth rate of 3.2%.
- Regional job concentration for Purdue: Fabricated Metal Product Mfg is 1.69 times the national job concentration. In other words, there are 69% more jobs at Purdue: Fabricated Metal Product Mfg 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: Fabricated Metal Product Mfg is \$52.0K, which is \$14.0K below the national average of \$66.0K.

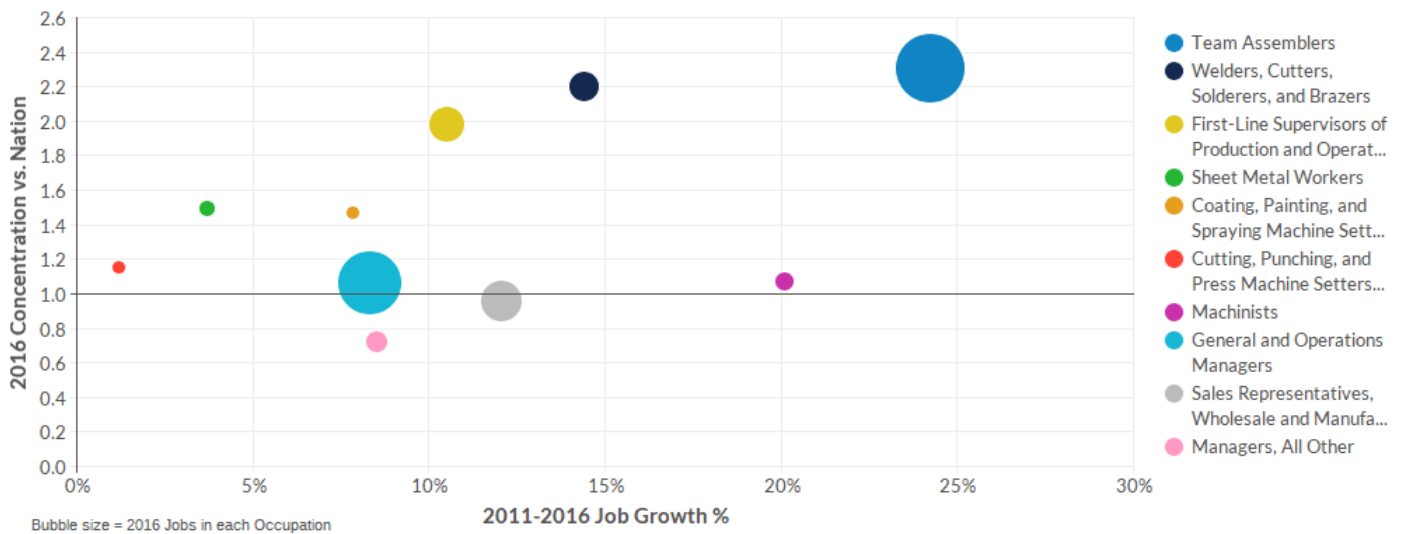
Regional Trends



Region	2011 Jobs	2016 Jobs	2021 Jobs	Change	2011-2016 Growth %	2016-2021 Growth %
48 Georgia ZIPs	1,423	1,648	1,779	356	15.8%	7.9%
Nation	1,319,445	1,398,107	1,443,348	123,903	6.0%	3.2%

Workforce Availability

Key occupations for Purdue: Fabricated Metal Product Mfg have an overall concentration of 1.43, indicating above average workforce availability. These occupations experienced overall job growth of 13.6% 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
51-2092	Team Assemblers	2.30	1,464	1,818	1,916	\$12.25/hr	\$12.70/hr
51-4121	Welders, Cutters, Solderers, and Brazers	2.20	539	617	651	\$13.45/hr	\$14.27/hr
51-1011	First-Line Supervisors of Production and Operating Workers	1.98	766	846	876	\$23.35/hr	\$26.24/hr
47-2211	Sheet Metal Workers	1.50	151	157	163	\$14.03/hr	\$14.99/hr
51-9121	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	1.47	85	92	97	\$13.07/hr	\$13.07/hr
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	1.15	151	152	148	\$13.15/hr	\$13.90/hr
51-4041	Machinists	1.08	249	299	345	\$16.10/hr	\$17.18/hr
11-1021	General and Operations Managers	1.06	1,522	1,648	1,770	\$31.03/hr	\$37.24/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
	Total	1.43	6,175	7,016	7,496	\$19.99/hr	\$22.61/hr

Supply Chain Requirements

17%

Satisfied In-Region

17% of the goods and services that 33 Manufacturing requires to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$24,980,254	0.3%
332710	Machine Shops*	\$8,672,776	44.8%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$8,490,317	18.5%
331318	Other Aluminum Rolling, Drawing, and Extruding	\$4,008,634	31.1%
331315	Aluminum Sheet, Plate, and Foil Manufacturing	\$3,357,150	0.0%
325510	Paint and Coating Manufacturing	\$2,996,580	4.3%
332312	Fabricated Structural Metal Manufacturing *	\$2,696,089	61.5%
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$2,607,842	4.1%
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	\$2,562,050	3.3%
332322	Sheet Metal Work Manufacturing *	\$2,521,810	18.7%

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

Appendix A - Industries

Code	Description
332111	Iron and Steel Forging
332112	Nonferrous Forging
332114	Custom Roll Forming
332117	Powder Metallurgy Part Manufacturing
332119	Metal Crown, Closure, and Other Metal Stamping (except Automotive)
332215	Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing
332216	Saw Blade and Handtool Manufacturing
332311	Prefabricated Metal Building and Component Manufacturing
332312	Fabricated Structural Metal Manufacturing
332313	Plate Work Manufacturing
332321	Metal Window and Door Manufacturing
332322	Sheet Metal Work Manufacturing
332323	Ornamental and Architectural Metal Work Manufacturing
332410	Power Boiler and Heat Exchanger Manufacturing
332420	Metal Tank (Heavy Gauge) Manufacturing
332431	Metal Can Manufacturing
332439	Other Metal Container Manufacturing
332510	Hardware Manufacturing
332613	Spring Manufacturing
332618	Other Fabricated Wire Product Manufacturing
332710	Machine Shops
332721	Precision Turned Product Manufacturing
332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing
332811	Metal Heat Treating
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers
332813	Electroplating, Plating, Polishing, Anodizing, and Coloring
332911	Industrial Valve Manufacturing
332912	Fluid Power Valve and Hose Fitting Manufacturing
332913	Plumbing Fixture Fitting and Trim Manufacturing

Code	Description
332919	Other Metal Valve and Pipe Fitting Manufacturing
332991	Ball and Roller Bearing Manufacturing
332996	Fabricated Pipe and Pipe Fitting Manufacturing
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing

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