



# TARGET INDUSTRY STUDY

*Washington-Wilkes County, Georgia*

June 2020

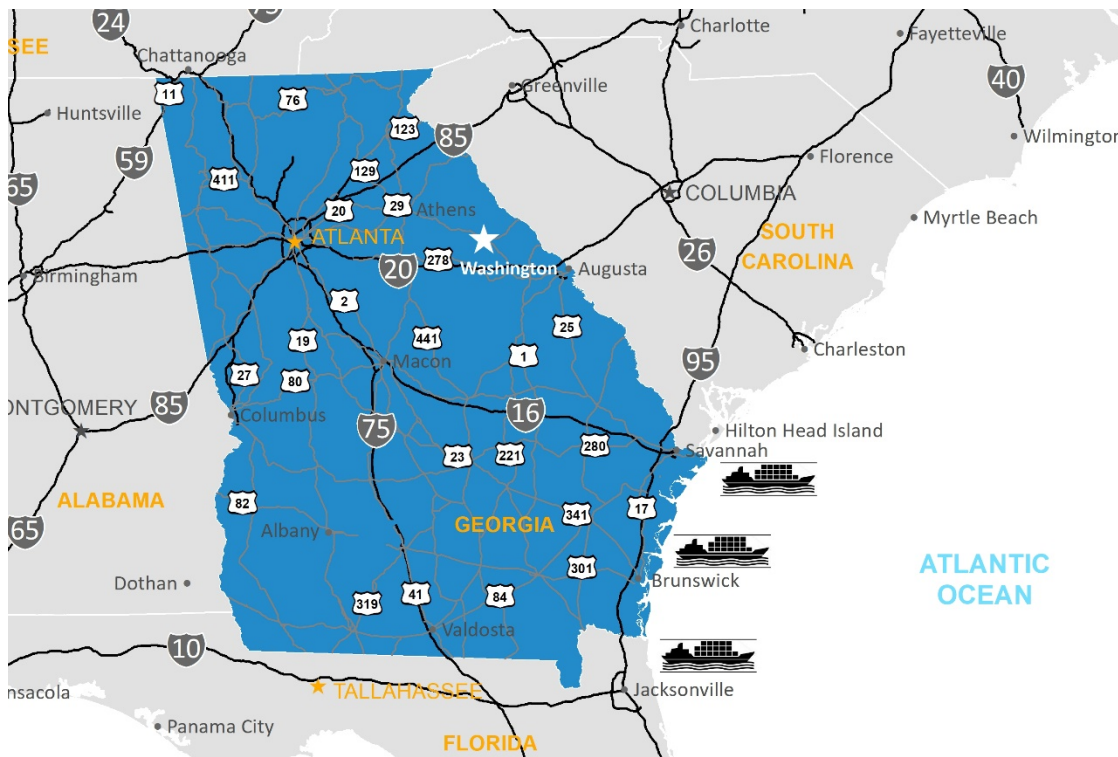
*prepared on behalf of*

*Washington*  
GEORGIA

*prepared by*

 **ECG** | Economic &  
Community  
Development

# About the Washington - Wilkes County Labor & Target Industry Studies



In March 2020, ECG's Office of Economic & Community Development completed a Washington-Wilkes County Labor Study on behalf of the City of Washington, which was aimed at assisting the City in improving the local economy through a better understanding of its regional labor force assets. The Labor Study explored information about regional workforce characteristics, commuter flow patterns, workforce housing, and education.

The following Target Industry Study provides ECG's data-driven recommendations for the City of Washington regarding industries and niche industry sectors on which the City

might focus its strategic resources including business recruitment and retention, infrastructure investments, and workforce training. Target industry recommendations blend industry concentration analysis, data trends, and target industry synergies with the State of Georgia. The Target Industry Study is also meant to supplement the information in the previously completed Labor Study.

# Why Identify Target Industries?

Identifying target industries is one of the most important steps a community can take to develop a comprehensive economic development strategy. Since no community can be an ideal fit for all types of businesses, the most effective communities assess their key competitive advantages and **target their activities on businesses and industries** that best harmonize with those advantages. Target industries are not only about business attraction, but also business retention and **fostering an environment that encourages new businesses** to form locally. It is also about **aligning economic development activities** toward a shared goal for the entire community.

The following Target Industry Study provides target industry recommendations for the City of Washington and a description of the methodology used to arrive at the recommendations. The Study provides **descriptions of each recommended industry, their alignments with the State of Georgia's target industries, their unique requirements, and sample target sales messages that make the case for locating or expanding in Washington.**

# Executive Summary

Target industries identified in this report are **Wood Products**, **Agriculture**, **Textiles**, and **Transportation Manufacturing & Suppliers**. These industries provide the best fit for Washington and Wilkes County due to the presence of regional workers with relevant skills, the existence of related business establishments, and regional infrastructure such as interstate access, rail, and utilities.

The constituent industry sectors for each of the target industries have either a strong presence or a weak presence that is increasing rapidly within Wilkes County or its surrounding contiguous counties.

For more information about the recommended target industries, see the Target Industry Recommendations and Target Industry Profiles sections of this study.

TARGET INDUSTRY    INDUSTRY SECTORS



## Wood Products

Forestry and Logging  
Wood Product Manufacturing  
Paper Manufacturing



## Agriculture

Animal Production and Aquaculture  
Crop Production  
Food Manufacturing



## Textiles

Textile Mills  
Textile Product Mills  
Apparel Manufacturing

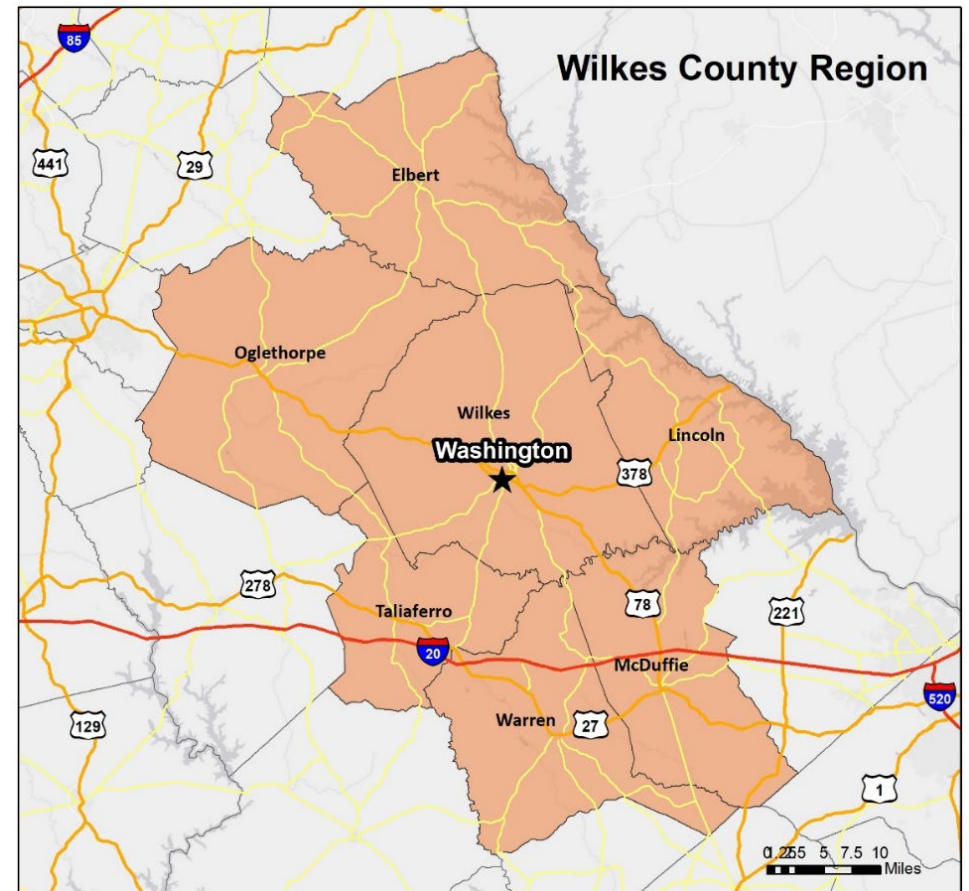
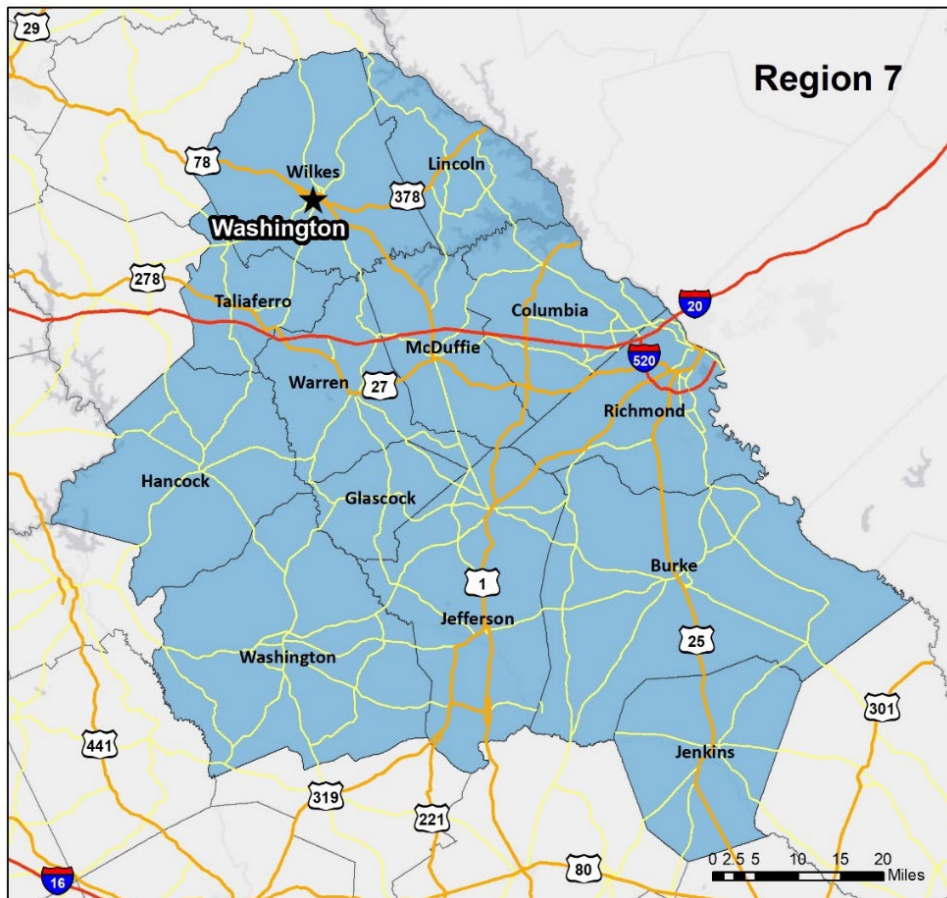


## Transportation Manufacturing & Suppliers

Transportation Equipment Manufacturing  
Plastics and Rubber Products Manufacturing  
Fabricated Metal Product Manufacturing

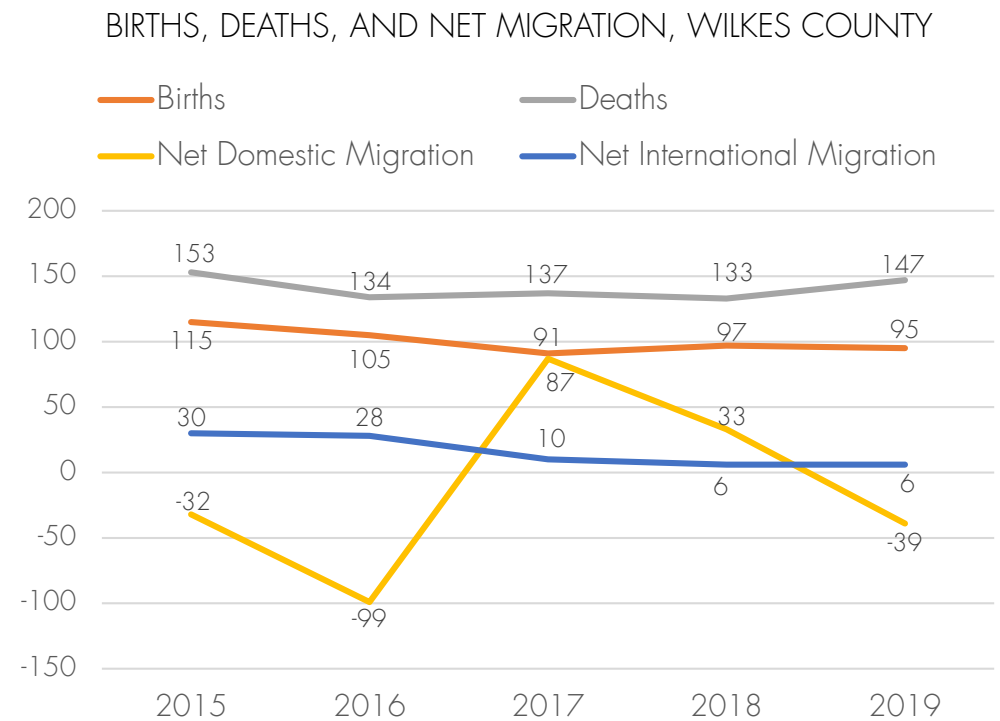
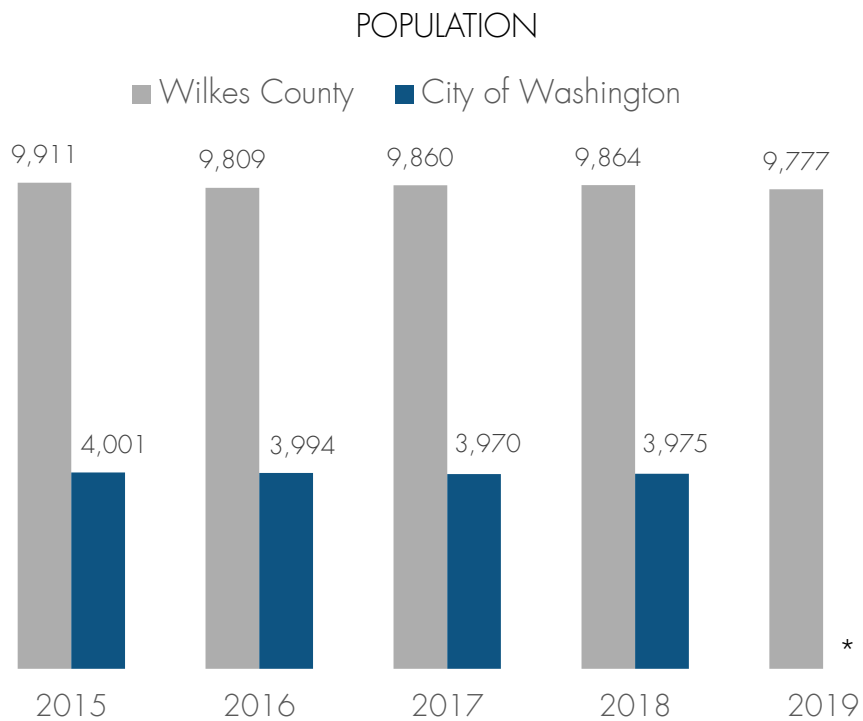
# Region Definitions and Data Note

In this report, **Region 7** refers to State Service Delivery Region in Georgia to which Wilkes County belongs. The **Wilkes County Region** refers to Wilkes and its contiguous surrounding counties. Much of the data reported is for Wilkes County instead of the City of Washington. As a community with a small population, some official data is unavailable at the city level.



# Demographic Background

The populations of Washington and Wilkes County have declined slightly in the past five years. Deaths in Wilkes County have exceeded births in the same time period.



Source: ECG / JobsEQ (Wilkes County) / U.S. Census Bureau American Community Survey (City of Washington)

Source: ECG / JobsEQ

\*2019 population data for the City of Washington is not yet available.

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The Education & Skills section assesses the educational characteristics of the workforce, school performance, and skill gaps in Washington-Wilkes County.

## WORKFORCE FLOW



The Workforce Flow section addresses commuter patterns and commute times in the Washington-Wilkes County region.

## INDUSTRY



The Industry section provides a background of the industry conditions including employment numbers, top employers, and industry cluster concentrations.

## TARGET INDUSTRY RECOMMENDATIONS



This section summarizes the recommended target industries and details the methodology used to select them, along with their alignment with state targets.

## TARGET INDUSTRY PROFILES



The Target Industry Profiles describe each industry recommended in greater detail, unique industry requirements, and how they make sense for Washington-Wilkes County.

# Education & Skills

This section of the report assesses the educational characteristics of the workforce, school performance, and skill gaps in Washington-Wilkes County.



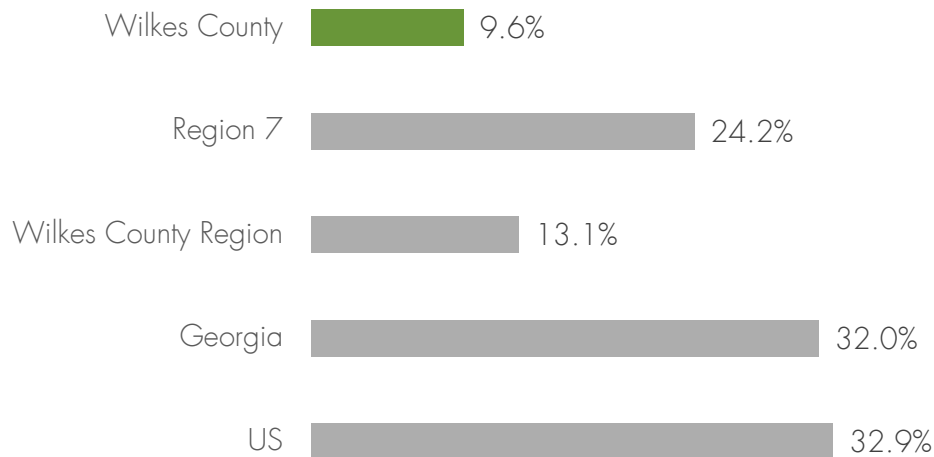
# Educational Attainment

Wilkes County has a relatively low share of residents with bachelor's degrees and associate's degrees. For a more detailed summary of educational attainment, please see the Washington-Wilkes County Labor Study.

## WHY IS THIS IMPORTANT?

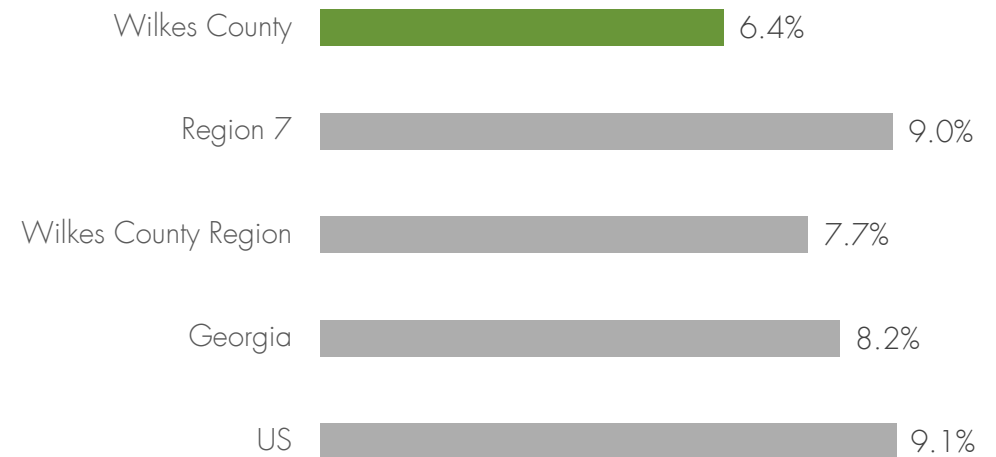
The educational attainment of a region is an important component of business location and expansion decisions since being able to hire a qualified workforce is a crucial factor in business success.

SHARE OF 25 YEARS+ POPULATION  
W/ A BACHELOR'S DEGREE OR HIGHER, 2018



Source: ECG / JobsEQ

SHARE OF 25 YEARS+ POPULATION  
W/ AN ASSOCIATE'S DEGREE, 2018



Source: ECG / JobsEQ

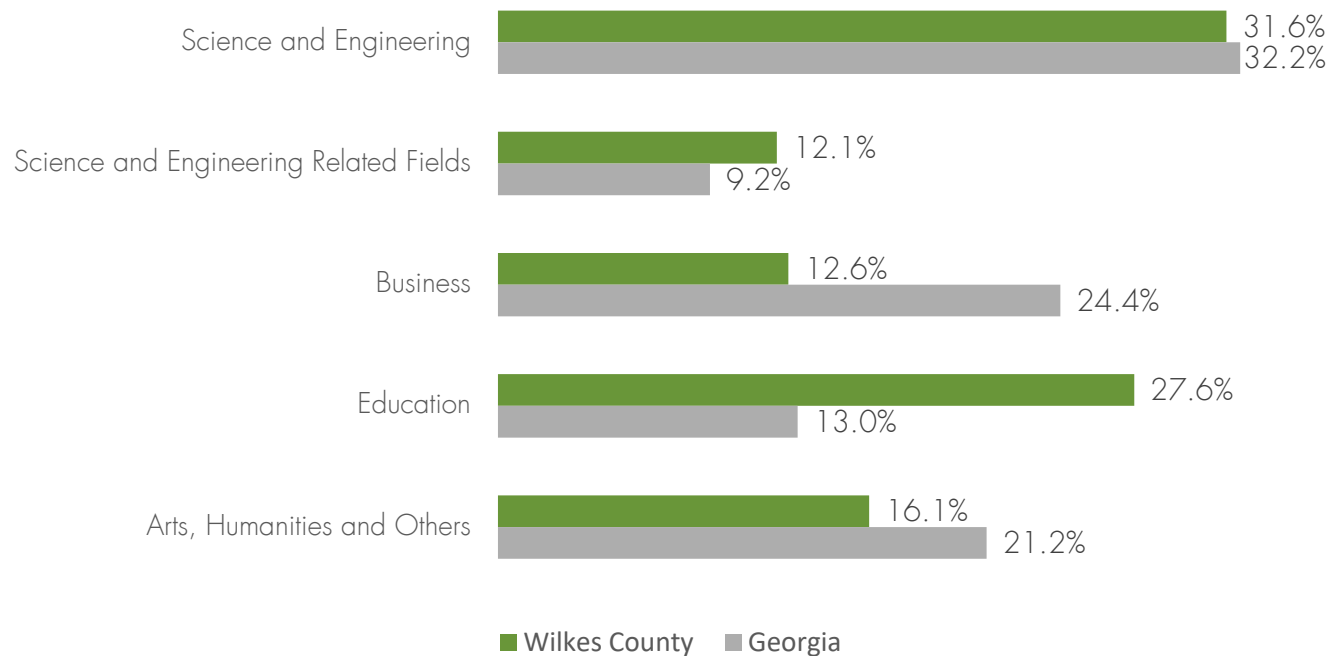
# Educational Breakdown

## WHY IS THIS IMPORTANT?

Wilkes County residents who have bachelor's degrees are more likely to have Education or Science & Engineering related degrees (including Health Care) than their Georgia counterparts. Wilkes County holders of bachelor's degrees are less likely to hold Business and Arts & Humanities degrees than the Georgia average.

The educational breakdown of a region is an important component of business location and expansion decisions since being able to hire a qualified workforce is a crucial factor in business success.

FIELD OF BACHELOR'S DEGREE FOR FIRST MAJOR OF 25 YEARS+  
POPULATION WITH BACHELOR'S DEGREES, WILKES COUNTY, 2018



Source: ECG / U.S. Census Bureau American Community Survey

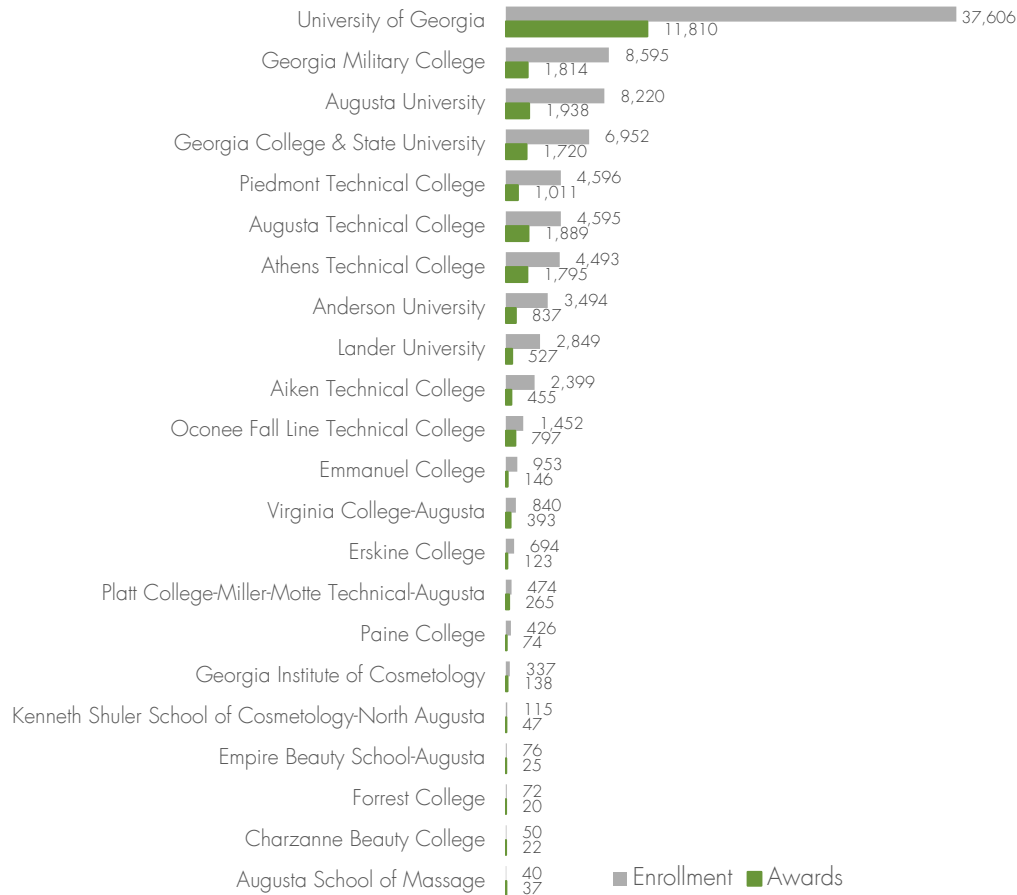
# Educational Breakdown

Washington, Georgia, is within 50 miles of 23 post-secondary institutions, including the University of Georgia (Athens), Georgia College & State University (Milledgeville), Georgia Military College (Augusta and Milledgeville campuses), and Augusta State University, among other four-year colleges and universities, technical schools, and trade schools. Most certificates awarded within 50 miles of Washington in 2018 were in Health Professions programs, Mechanic and Repair Technologies, and Business and related programs.

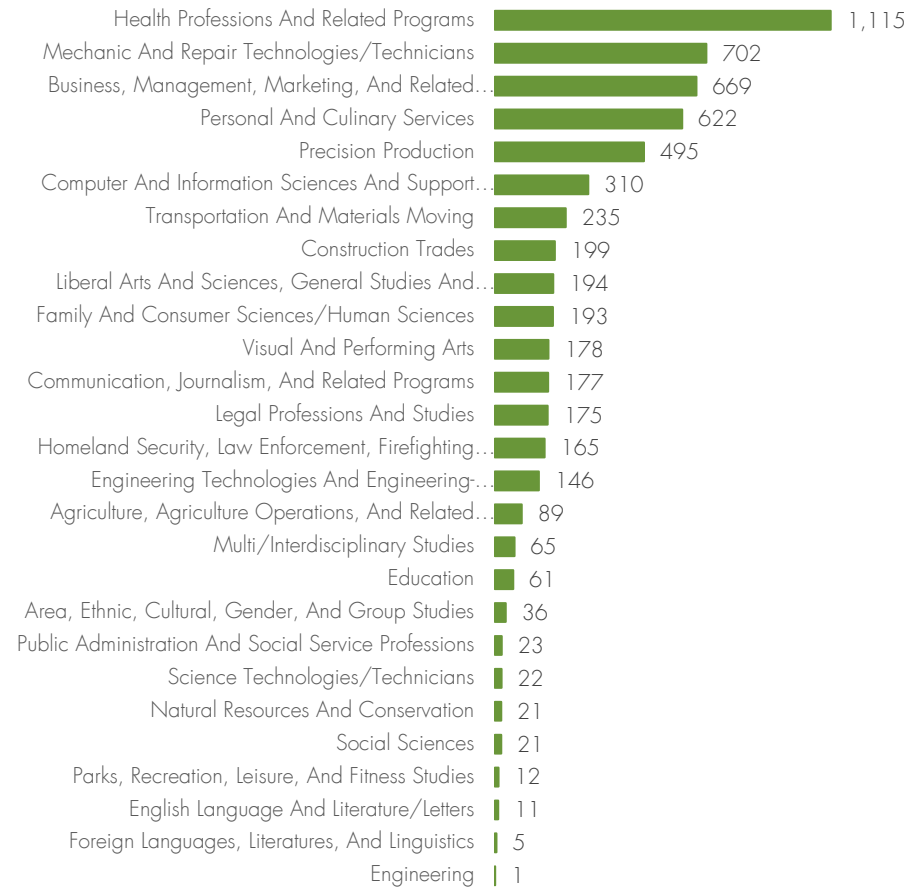
## WHY IS THIS IMPORTANT?

The educational breakdown of a region is an important component of business location and expansion decisions since being able to hire a qualified workforce is a crucial factor in business success.

AWARDS AND ENROLLMENT AT POST-SECONDARY EDUCATIONAL INSTITUTIONS WITHIN 50 MILES OF WASHINGTON, GEORGIA, 2018



CERTIFICATES AWARDED BY PROGRAM WITHIN 50 MILES OF WASHINGTON, GEORGIA, 2018



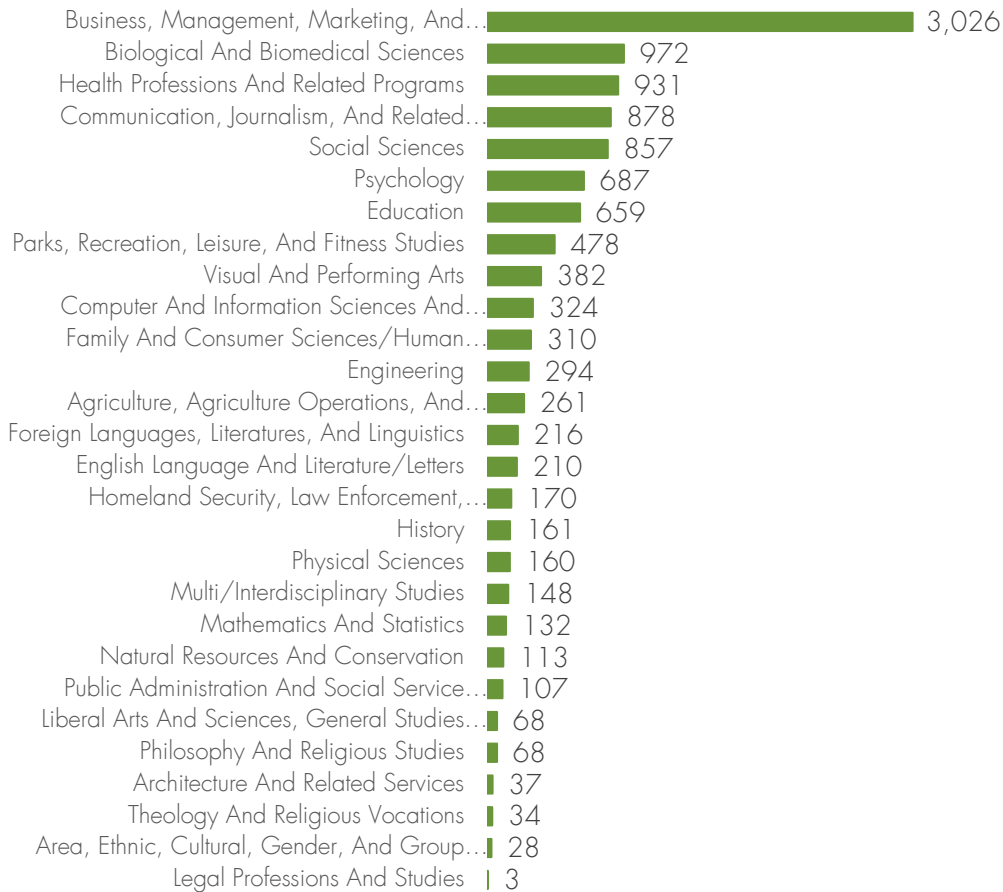
# Educational Breakdown

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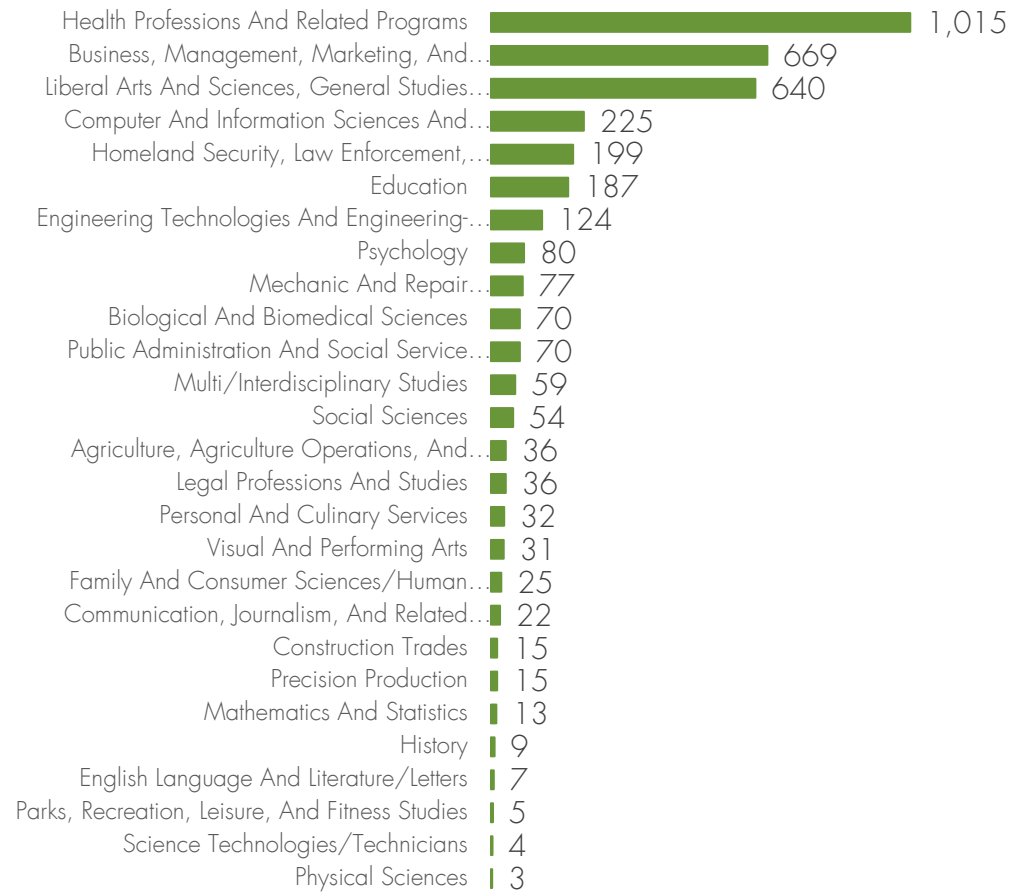
Most bachelor's degrees awarded in 2018 within 50 miles of Washington were in Business and related programs, followed by Biological and Biomedical Sciences, and Health Professions. Most associate's degrees awarded in 2018 were in Health Professions programs, followed by Business and related programs, and Liberal Arts and Sciences.

The educational breakdown of a region is an important component of business location and expansion decisions since being able to hire a qualified workforce is a crucial factor in business success.

BACHELOR'S DEGREES AWARDED  
WITHIN 50 MILES OF WASHINGTON, GEORGIA, 2018



ASSOCIATE'S DEGREES AWARDED  
WITHIN 50 MILES OF WASHINGTON, GEORGIA, 2018



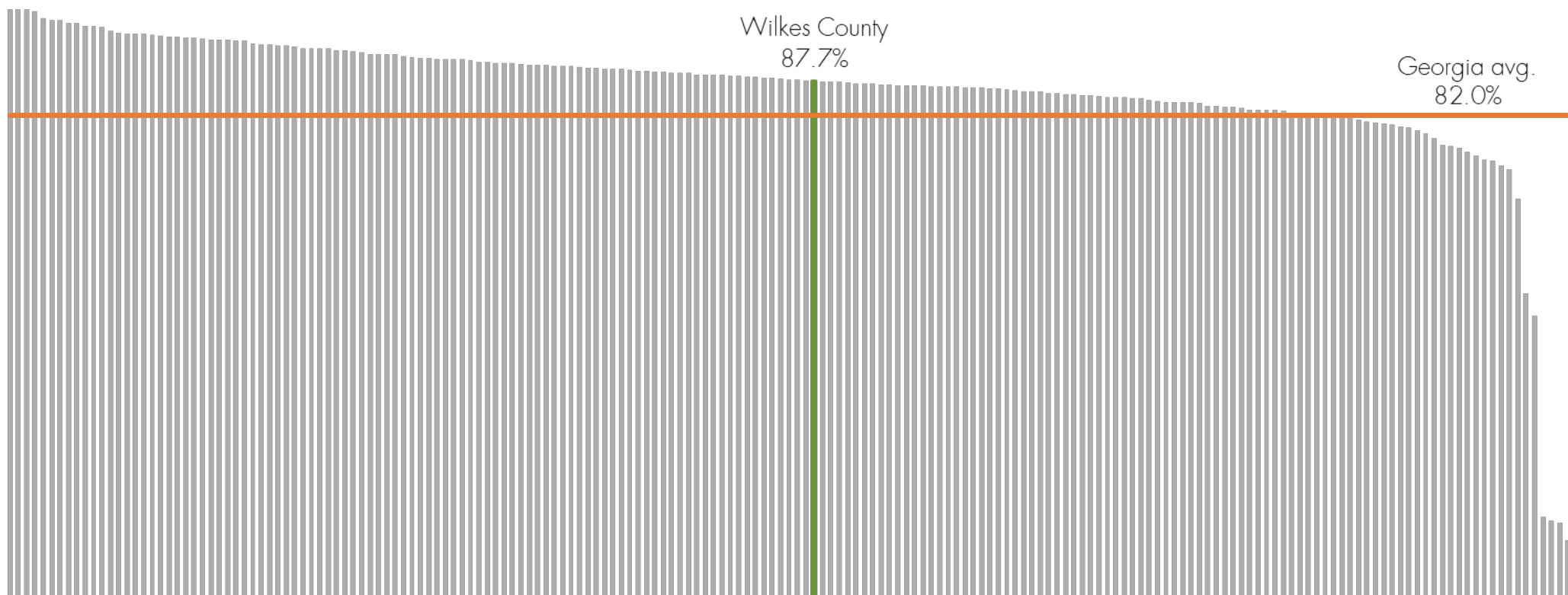
# School Performance

## WHY IS THIS IMPORTANT?

Wilkes County School System's high school graduation rate of 87.7% is close to the state median (88.0%) and above the state average (82.0%).

**K12 school performance is important for business location and expansion for two main reasons: (1) businesses want a qualified workforce pipeline and (2) businesses want workers to be able to send their children to good schools.**

HIGH SCHOOL GRADUATION RATES  
GEORGIA SCHOOL SYSTEMS, 2019



Source: ECG / Georgia Department of Education

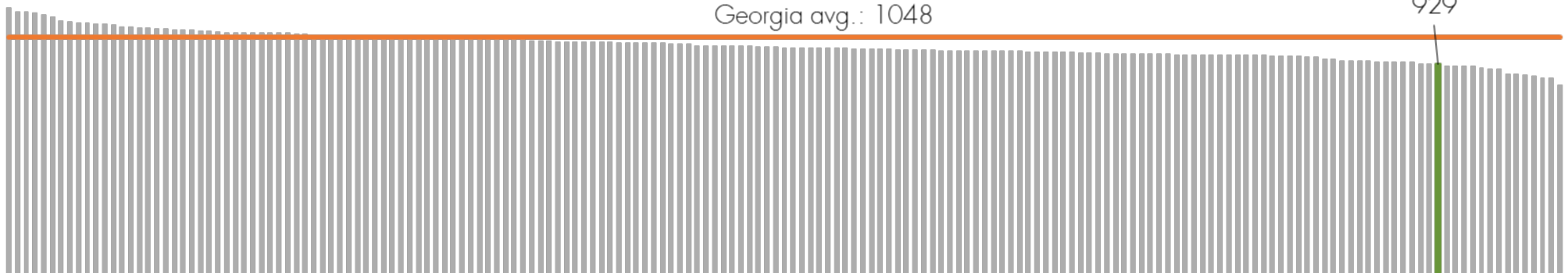
# School Performance

Among Wilkes County School System students who took the SAT test in 2019, the average score was 929, which was lower than the state average score of 1048. Wilkes County's average ACT score was 16.6, compared with the state average of 21.0. Wilkes County School System is ranked toward the bottom of Georgia public school systems in terms of both SAT and ACT scores.

## WHY IS THIS IMPORTANT?

**K12 school performance is important for business location and expansion for two main reasons: (1) businesses want a qualified workforce pipeline and (2) businesses want workers to be able to send their children to good schools.**

AVERAGE SAT SCORE BY SCHOOL SYSTEM IN GEORGIA, 2019



Source: ECG / Georgia Department of Education

AVERAGE ACT SCORE BY SCHOOL SYSTEM IN GEORGIA, 2019



Source: ECG / Georgia Department of Education

# Skills Gaps and Surpluses

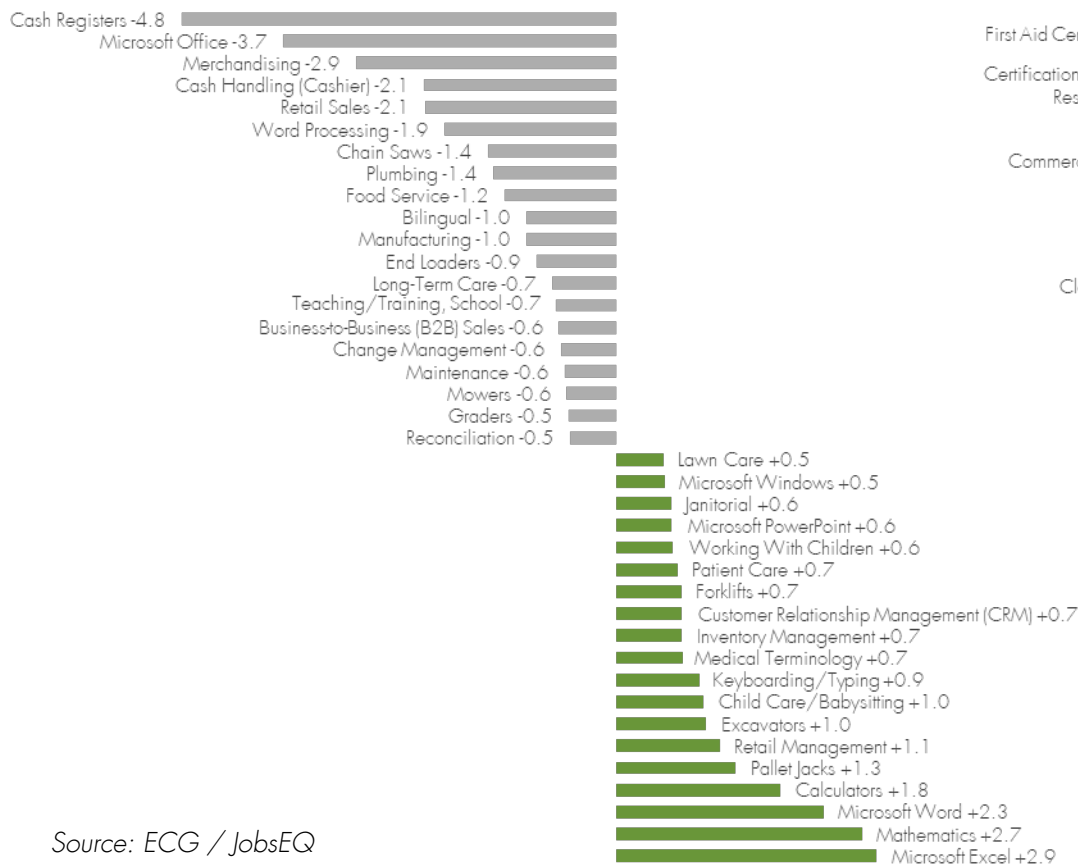
The charts below display the gap (negative) or surplus (positive) for each hard skill or certification between job openings in Wilkes County and resident workers seeking employment who live in Wilkes County. Hard skills with the largest gaps (more openings than candidates) include ones associated with retail sales, including Cash Registers, Merchandising, Cash Handling, and Retail Sales. Certifications with the largest gaps include First Aid Certification, CPR, and having a Commercial Driver's License (CDL). CDL holders in general and specifically CDL-B holders appear to be in short supply while CDL-A holders have a surplus of candidates.

## WHY IS THIS IMPORTANT?

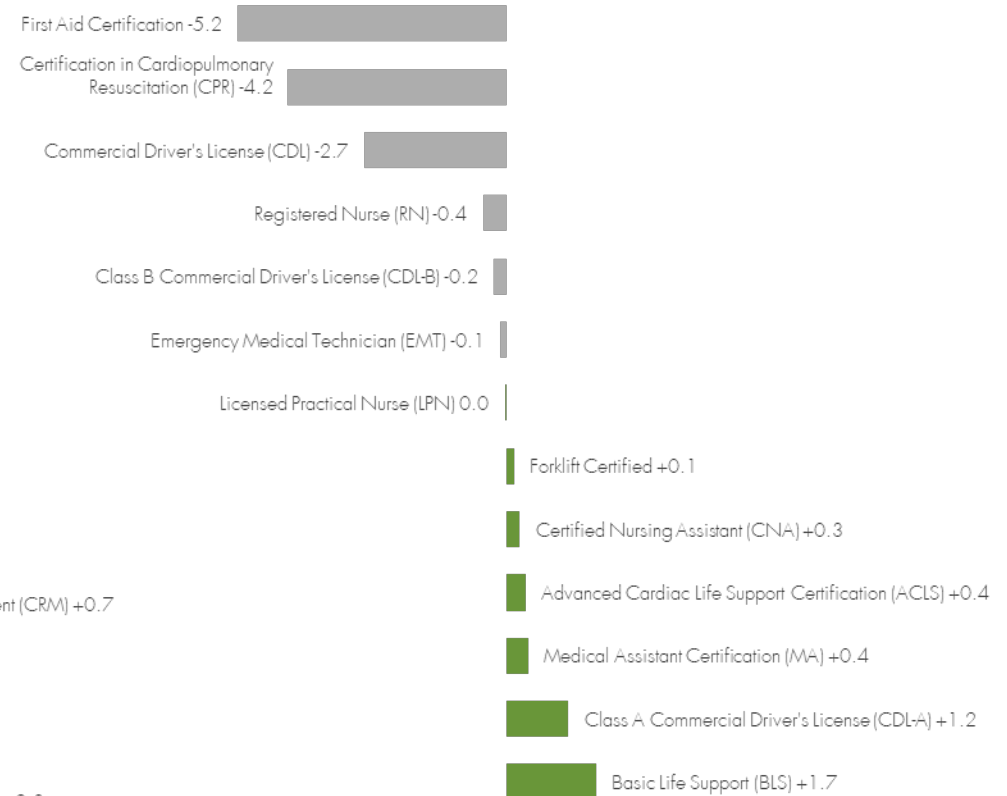
A skills gap analysis of a community assists workforce development personnel, educational institutions, and companies in bridging skill gaps and leveraging workers' strengths to attract businesses and tailor education and training programs to match the needs of employers.

SKILL GAPS AND SURPLUSES FOR RESIDENT WORKER CANDIDATES IN WILKES COUNTY, 2019 Q4

### HARD SKILLS



### CERTIFICATIONS



# Education & Skills Key Takeaways

01

*While residents of Wilkes County are less likely to hold degrees than the state average, the surrounding region has a large pool of new graduates.*

Degrees and certificates are concentrated in Health Care and Business, with many certificates also being awarded in Mechanical, Production, and Culinary Services programs.

02

*Wilkes County public school students graduate on par with the state but their test scores are much lower than average.*

Wilkes County public schools are graduating students at a fairly high rate but may not be providing enough SAT and ACT preparation for college-bound students. Scores for Wilkes are below the average scores accepted to UGA and GCSU.

03

*Retail hard skills are in short supply among Wilkes County job seekers, as are First Aid and CPR Certified Workers and CDL holders.*

The hard skills with the largest gaps (more openings than candidates) include Cash Registers, Merchandising, Cash Handling, and Retail Sales. Certifications with the largest gaps include First Aid Certification, CPR, and CDLs.



# Workforce Flow

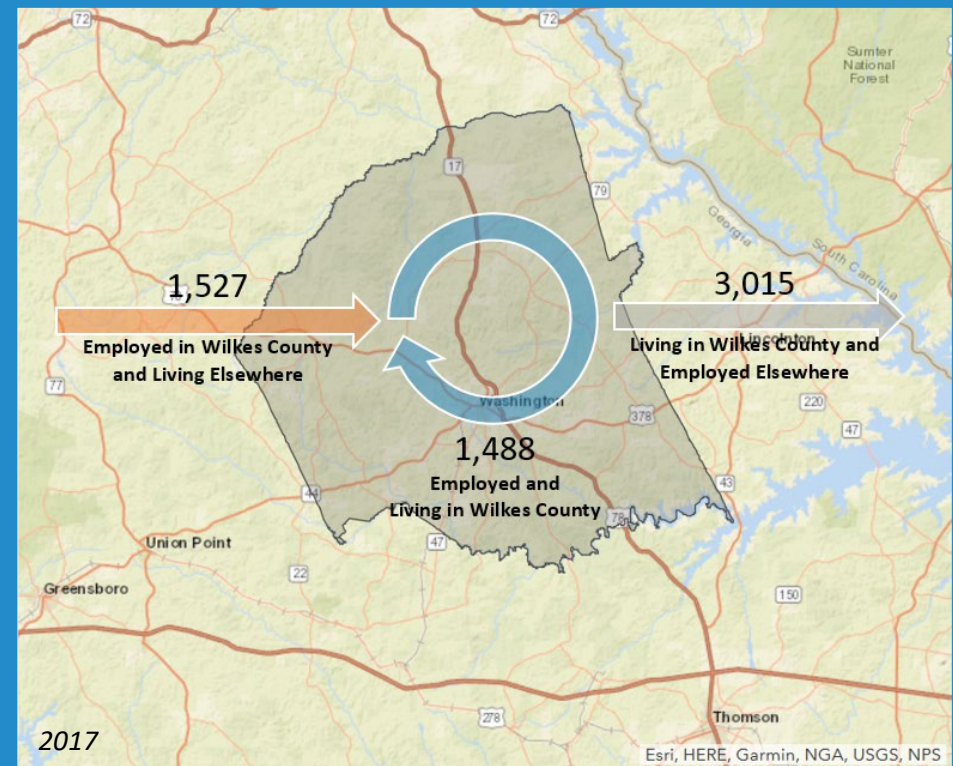
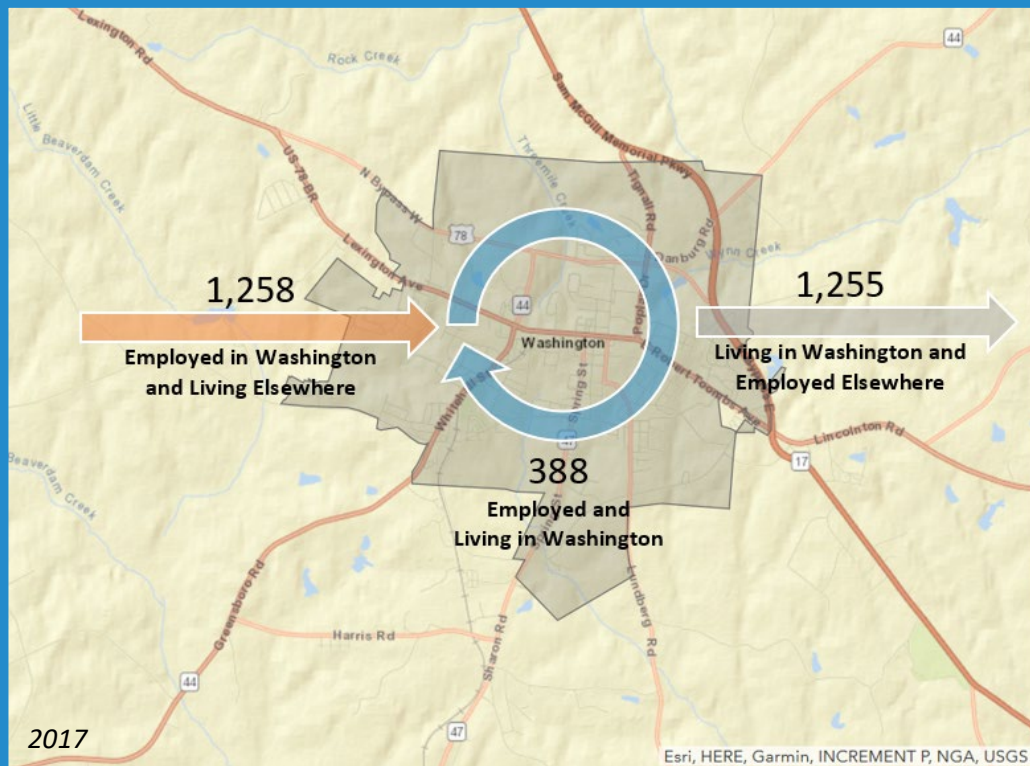
This section of the report details the commuter patterns of the Washington-Wilkes County region. Please see the Washington-Wilkes County Labor Study for additional information of commuter patterns and workforce flow.

# Commuter Patterns

Very few workers both live and work in Washington (388). Wilkes County follows a similar pattern of few workers who both live and work in the county (1,488). Far more people live in Wilkes County and work elsewhere (3,015) than workers who commute into the county for work from somewhere else (1,527). Similar numbers of workers commute into Washington from outside the city (1,258) as those who live in the city and work elsewhere (1,255).

## WHY IS THIS IMPORTANT?

Commuter patterns are important to businesses because communities that can draw on available talent outside of their immediate vicinity can significantly increase their available workforce.



Source: ECG / U.S. Census Bureau Center for Economic Studies

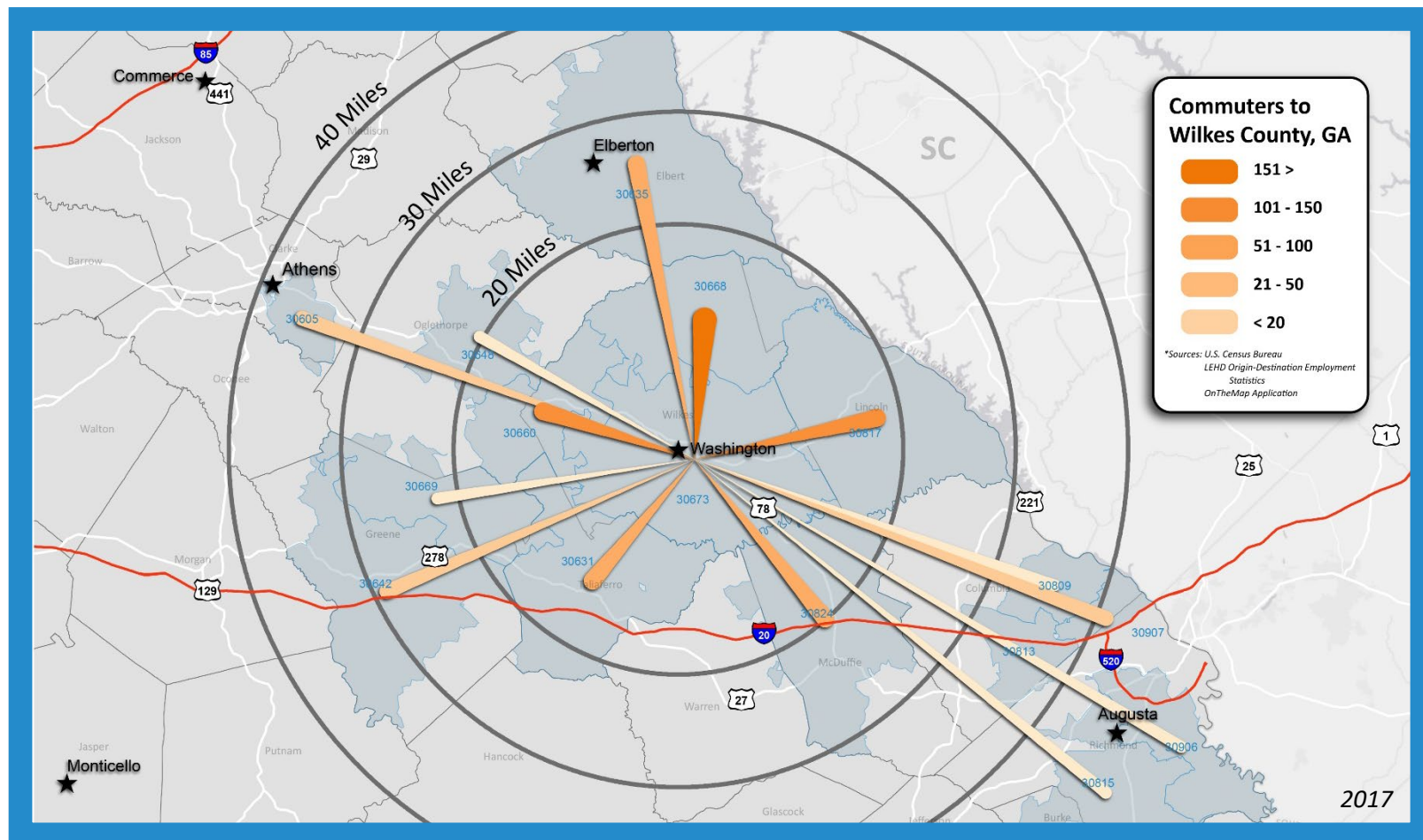
Source: ECG / U.S. Census Bureau Center for Economic Studies

# Commuter Patterns

Commuters to Wilkes County for work mainly come from inside the county and immediately surrounding counties, with some workers coming from slightly farther away in Elberton, Athens, Greensboro, and Augusta. Most commuters to Wilkes live within 50 miles of Washington.

## WHY IS THIS IMPORTANT?

Commuter patterns are important to businesses because communities that can draw on available talent outside of their immediate vicinity can significantly increase their available workforce.

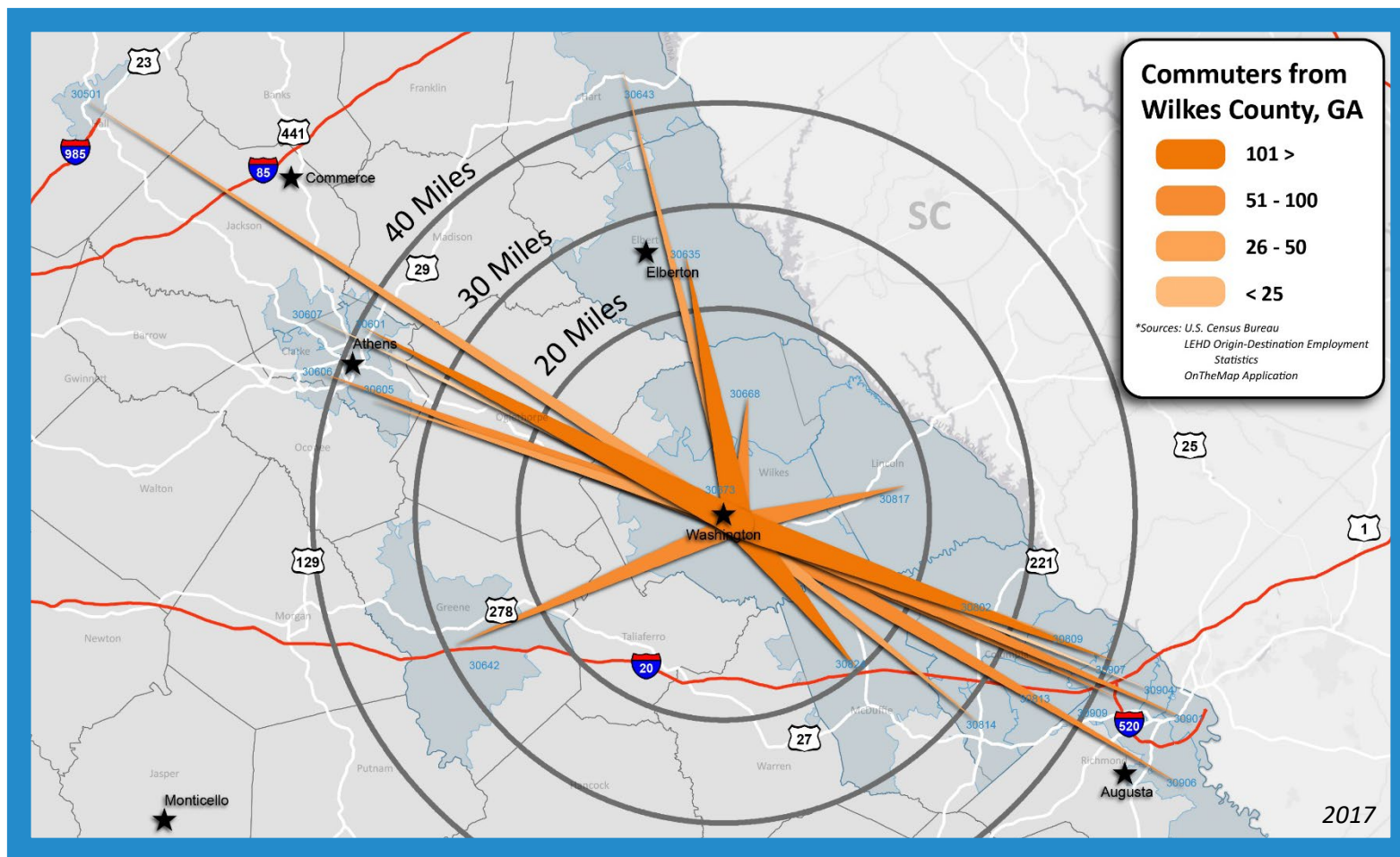


# Commuter Patterns

The top destinations for out-commuting residents of Wilkes County are Augusta, Athens, Elberton, and Greensboro. Some workers commute as far as Gwinnett and Hall counties. About a third of Wilkes' residents workers stay in the county for work.

## WHY IS THIS IMPORTANT?

Out-commuter patterns reveal the regional communities that draw workers from Wilkes County.



Source: ECG / U.S. Census Bureau Center for Economic Studies

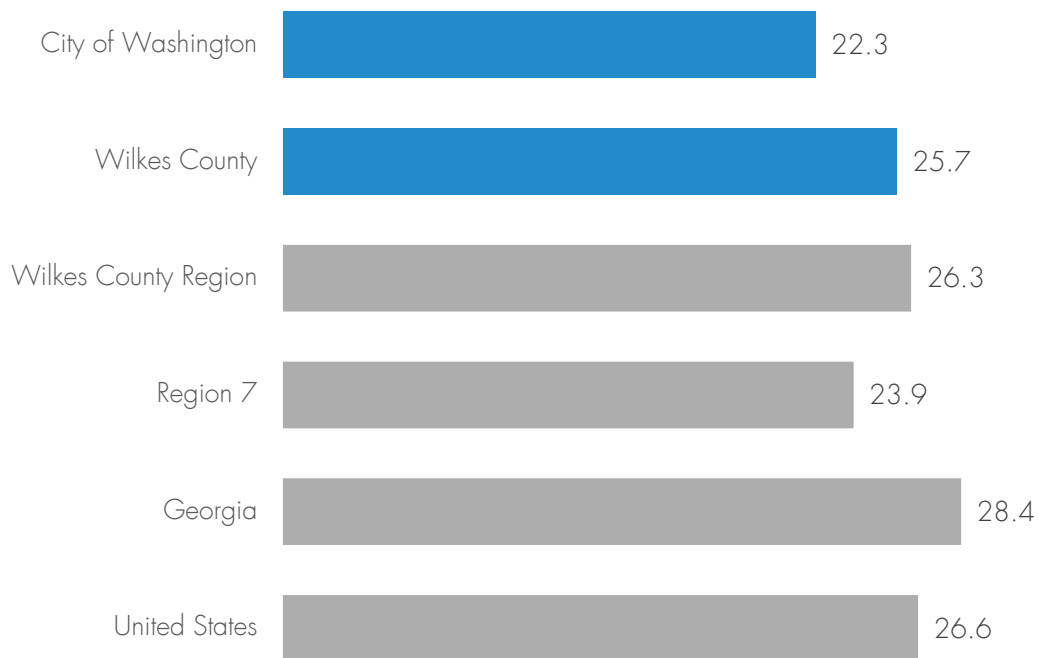
# Commute Times

The average worker living in Washington spends about 22 minutes commuting each way to and from work. This is less than the average commute time in Wilkes County, the Wilkes County Region, Region 7, Georgia, or the United States. About 11 percent of workers in Washington commute 60 or more minutes to work one way.

## WHY IS THIS IMPORTANT?

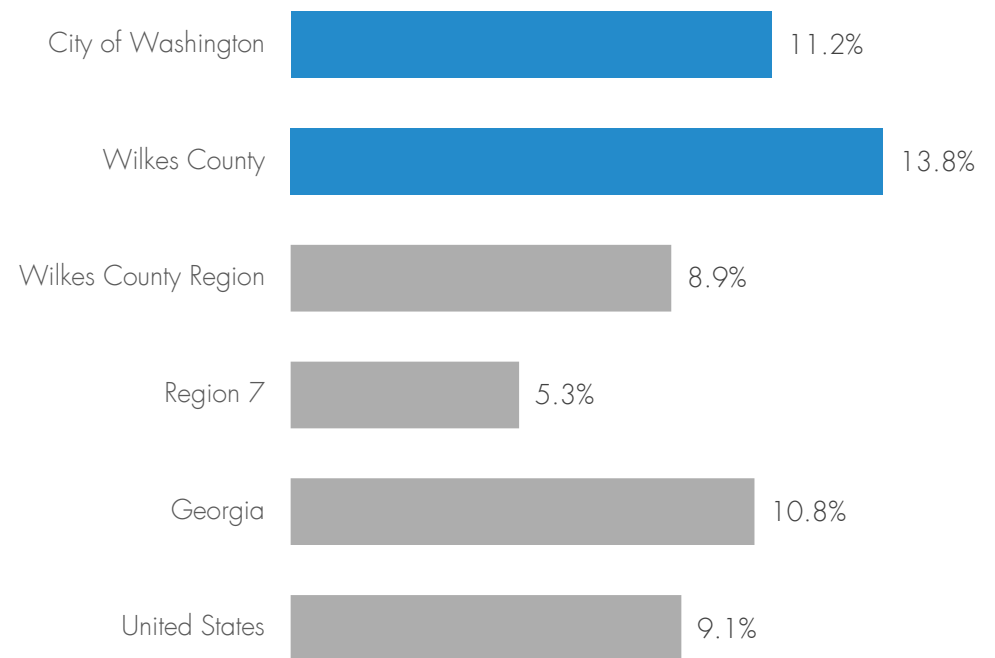
Commute times are indicative of how far workers are willing to travel to their place of employment. Low commute times are also an indicator of positive quality of life and of the availability of jobs closer to home.

AVERAGE COMMUTE TIME, MINUTES, 2018



Source: ECG / U.S. Census Bureau American Community Survey

% OF WORKERS THAT COMMUTE MORE THAN 60 MINUTES, 2018



Source: ECG / U.S. Census Bureau American Community Survey

# Workforce Flow Key Takeaways

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01

*Most Wilkes County residents who have jobs leave the county to commute to work.*

Many out-commuters travel to jobs in Augusta, Athens, Greensboro, and Elberton, but some travel as far as Gwinnett and Hall counties.

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02

*In-commuters to Wilkes County jobs mostly live in the surrounding counties.*

While most in-commuters to Wilkes County come from the contiguous surrounding counties, some in-commuters come from as far away as Athens, Augusta, Greensboro and Elberton.

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03

*Wilkes County is currently a bedroom community for Augusta and Athens.*

3,015 Wilkes County residents commute to jobs outside the county, while only 1,488 both live and work in the county, and 1,527 live work inside and live outside the county.

# Industry

The following section provides a background of the industry conditions including employment numbers, top employers, and industry cluster concentrations.

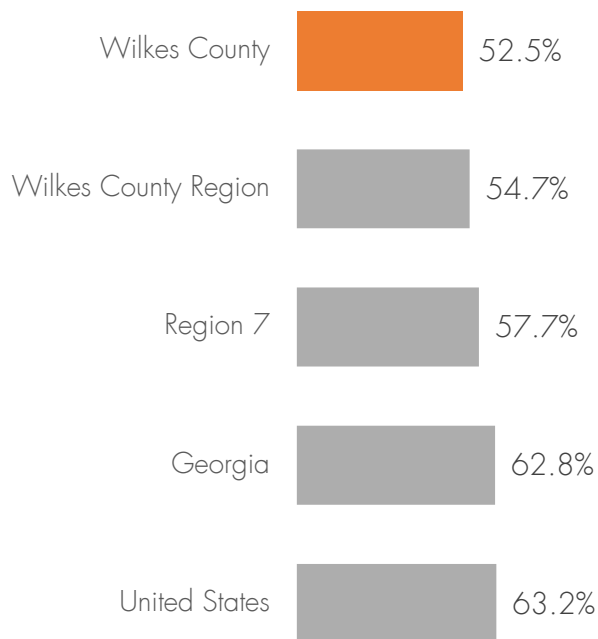
# Labor Force Participation

## WHY IS THIS IMPORTANT?

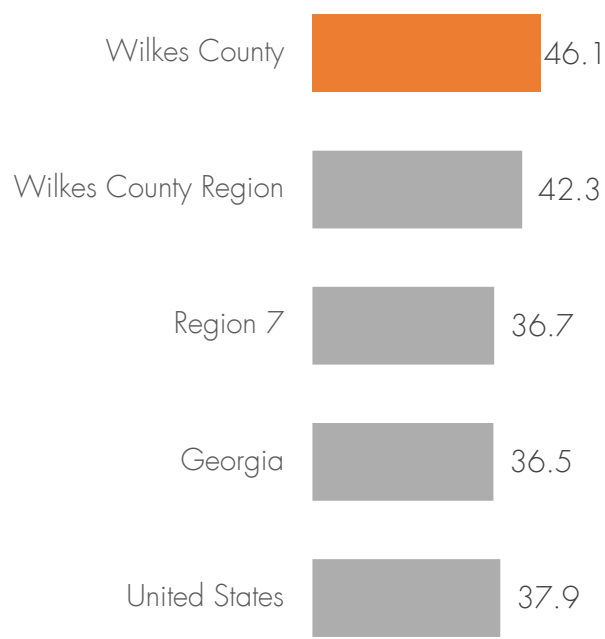
The Wilkes County labor force participation rate is relatively low compared with the surrounding regions and the state and national rates. About half of Wilkes County residents are in the labor force, which means they are 16 years or older and either currently working or unemployed and seeking work. The low labor force participation is likely due to the higher median age in Wilkes County, indicating a probable higher population of retirees.

Communities with low labor force participation rates feature a smaller available workforce than the total population figures might suggest. At the same time, such communities do not need to create as many jobs to maintain a balance between population and employment.

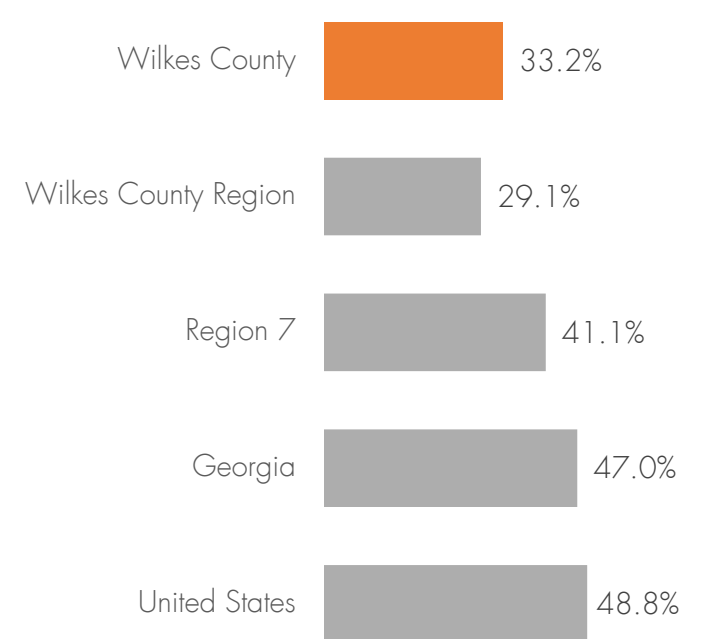
LABOR FORCE PARTICIPATION RATES, 2018



MEDIAN AGE, 2018



EMPLOYMENT TO POPULATION RATIO, 2018



Source: ECG / JobsEQ / U.S. Census Bureau American Community Survey



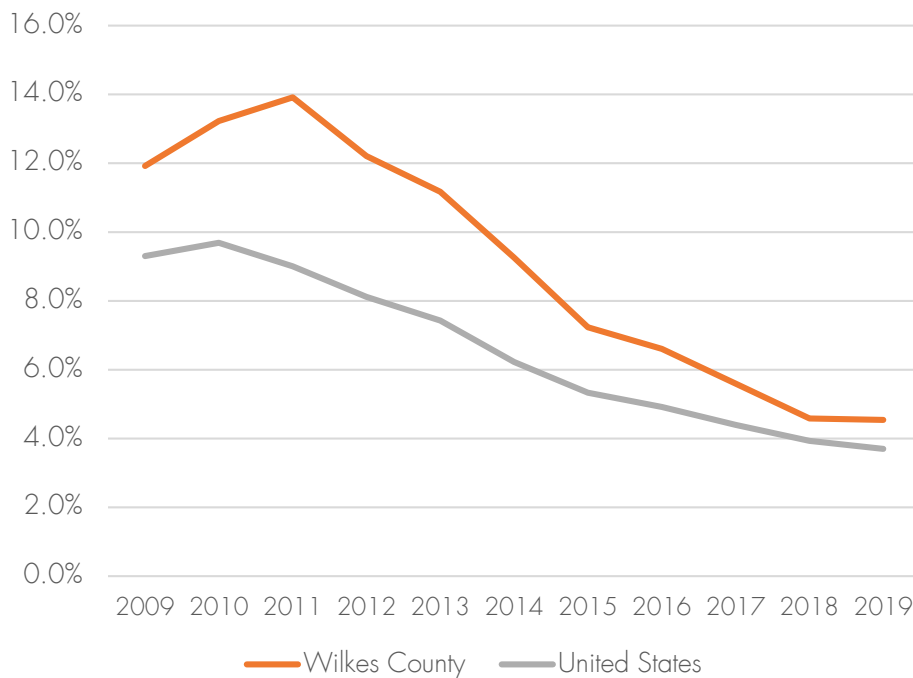
# Unemployment

Wilkes County's annual unemployment rate has consistently stayed above the national average, though the gap has narrowed in recent years. Wilkes County also has a higher unemployment rate than the surrounding region and state.

## WHY IS THIS IMPORTANT?

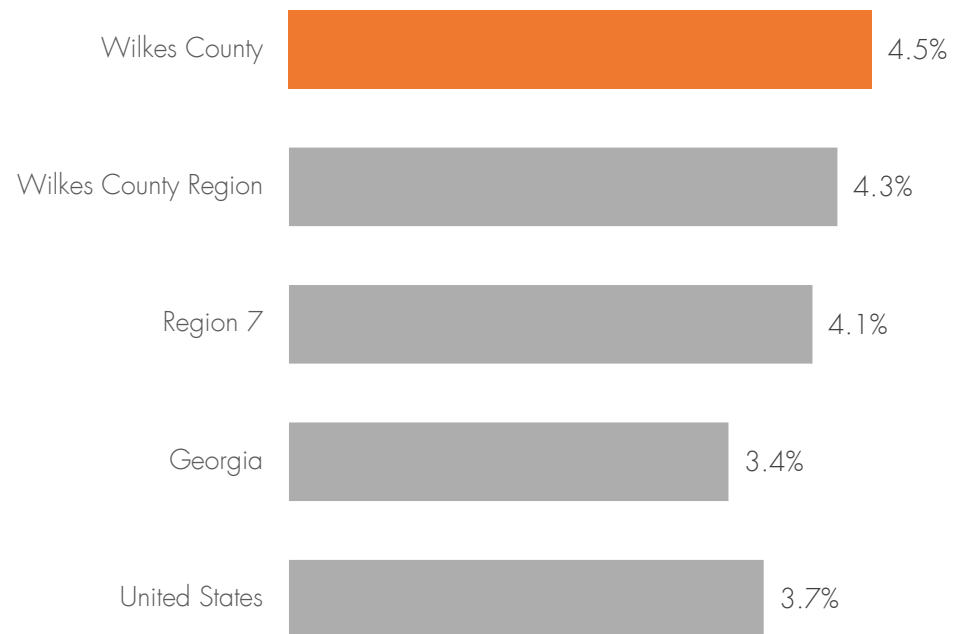
Low unemployment suggests that the residents are able to secure employment. However, very low unemployment may indicate a workforce shortage and may signal to businesses that they will have difficulty hiring. High unemployment may indicate that a large portion of residents are seeking jobs.

ANNUAL UNEMPLOYMENT RATE, 2009-2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

ANNUAL UNEMPLOYMENT RATE, 2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

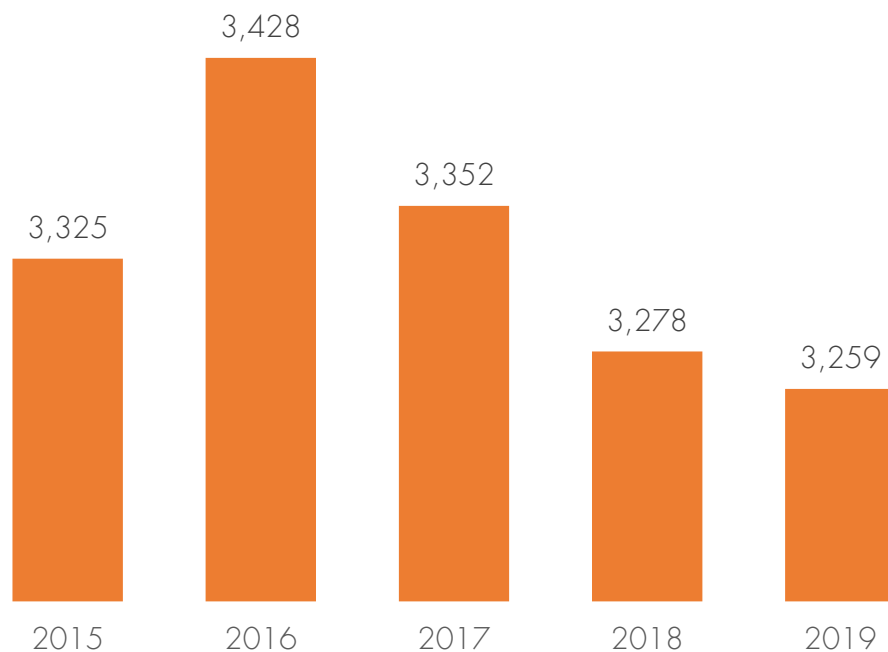
# Employment Change by Industry

Overall job growth in the past five years in Wilkes County has been -2% (a net loss of 66 jobs). By contrast jobs in the Wilkes County Region (contiguous surrounding counties) have grown by 1.2%, jobs in Region 7 by 6.2%, jobs in Georgia by 7.9%, and jobs in the United States as a whole by 5.7%.

## WHY IS THIS IMPORTANT?

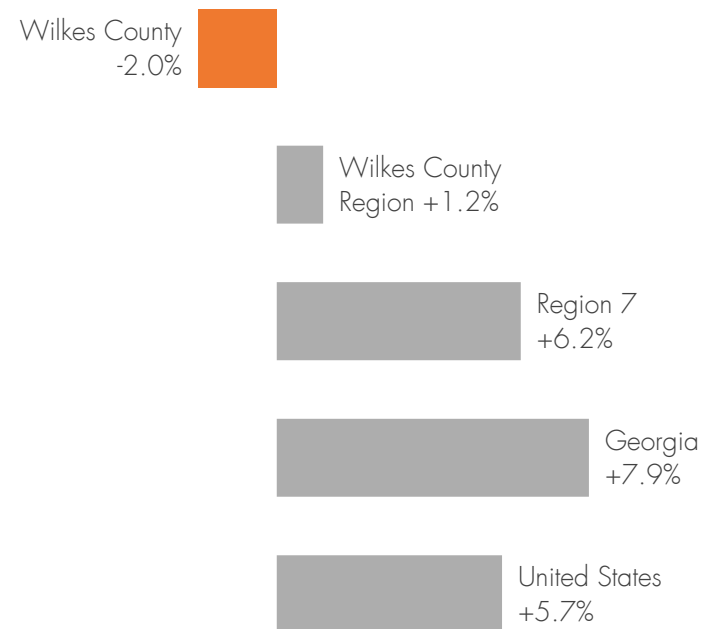
Employment growth is a primary indicator of a community's economic health. Strong job creation relative to benchmark communities can indicate a more competitive business climate and the presence of strategic resources.

EMPLOYMENT, WILKES COUNTY, 2015-2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

EMPLOYMENT CHANGE, 2015-2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

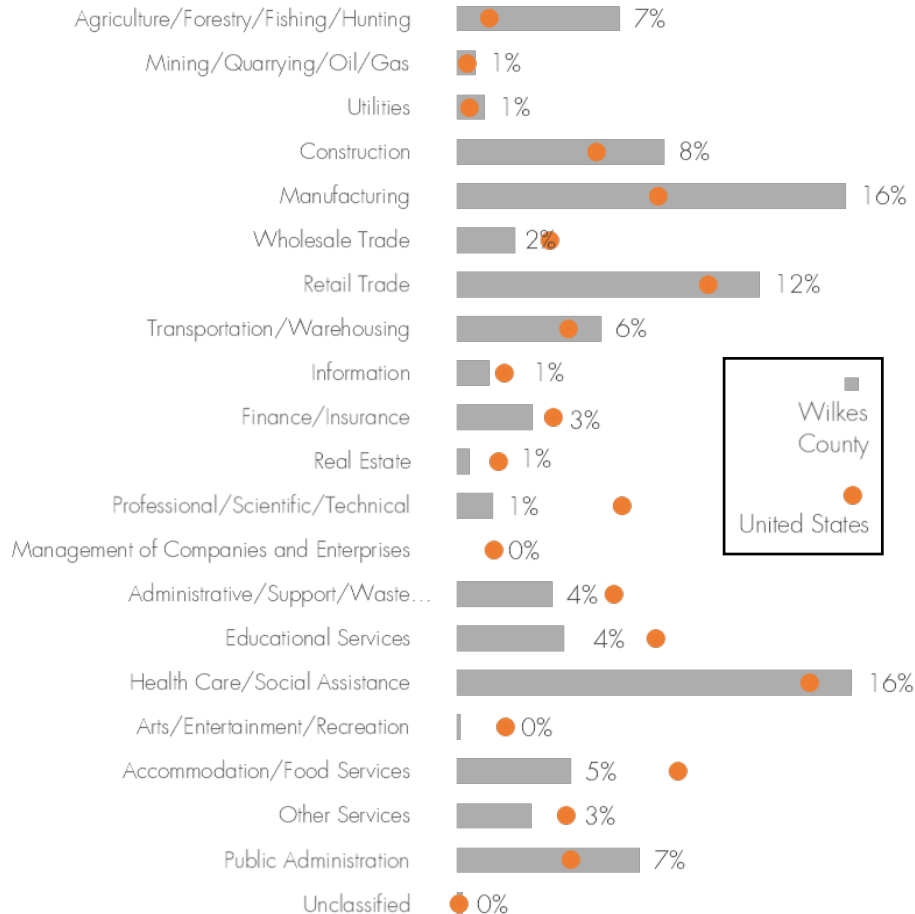
# Industry Diversity: US Benchmark

While Wilkes County has experienced mild overall job losses, some industries are doing well, while others are in decline. The industries that have experienced the largest percentage of job losses are Arts / Entertainment / Recreation, Unclassified, and Information. The industries that have gained the largest percent of jobs are Mining / Quarrying / Oil / Gas, Construction, Real Estate, and Utilities. Top industries for Wilkes County are Manufacturing, Health Care, and Retail Trade.

## WHY IS THIS IMPORTANT?

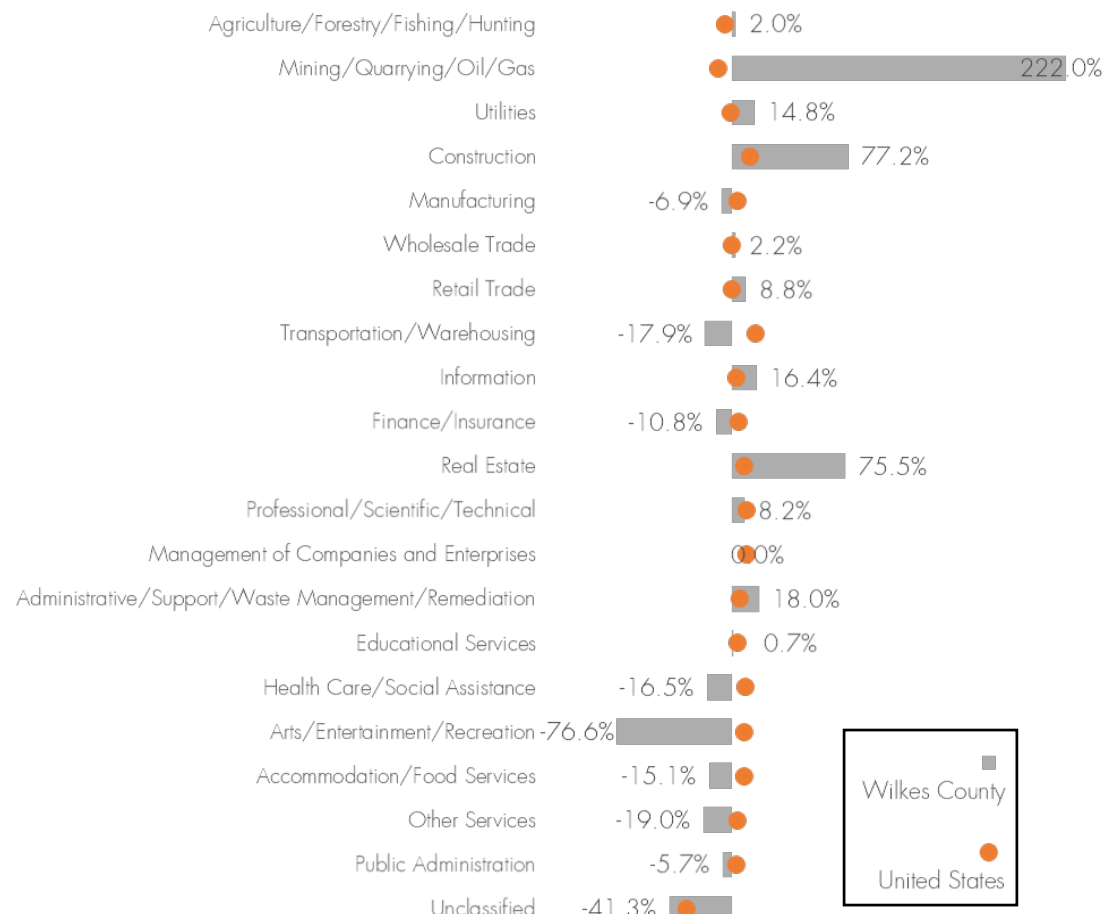
Resilient economies employ a diverse mix of industries. A diverse industry mix allows communities to better weather economic downturns that affect one industry more than others. A diverse economy also provides jobs with different educational and experience requirements that help sustain all residents.

EMPLOYMENT BY INDUSTRY, 2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

EMPLOYMENT CHANGE BY INDUSTRY, 2015-2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

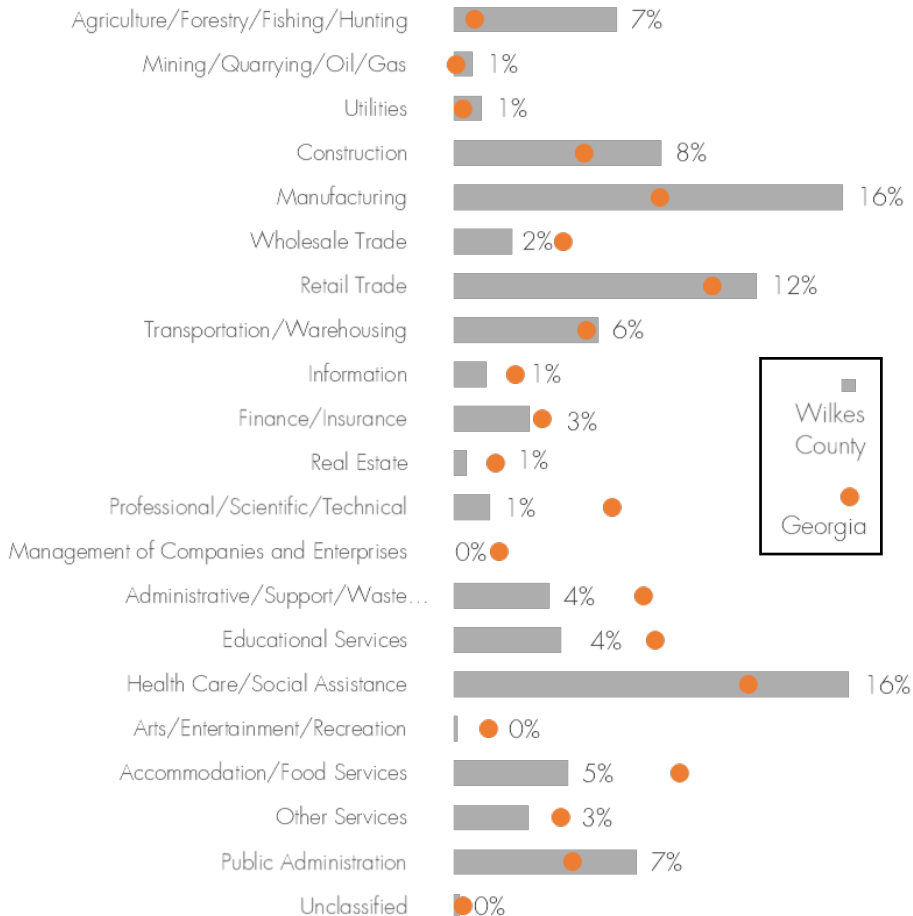
# Industry Diversity: GA Benchmark

While Wilkes County has experienced mild overall job losses, some industries are doing well, while others are in decline. The industries that have experienced the largest percentage of job losses are Arts / Entertainment / Recreation, Unclassified, and Information. The industries that have gained the largest percent of jobs are Mining / Quarrying / Oil / Gas, Construction, Real Estate, and Utilities. Top industries for Wilkes County are Manufacturing, Health Care, and Retail Trade.

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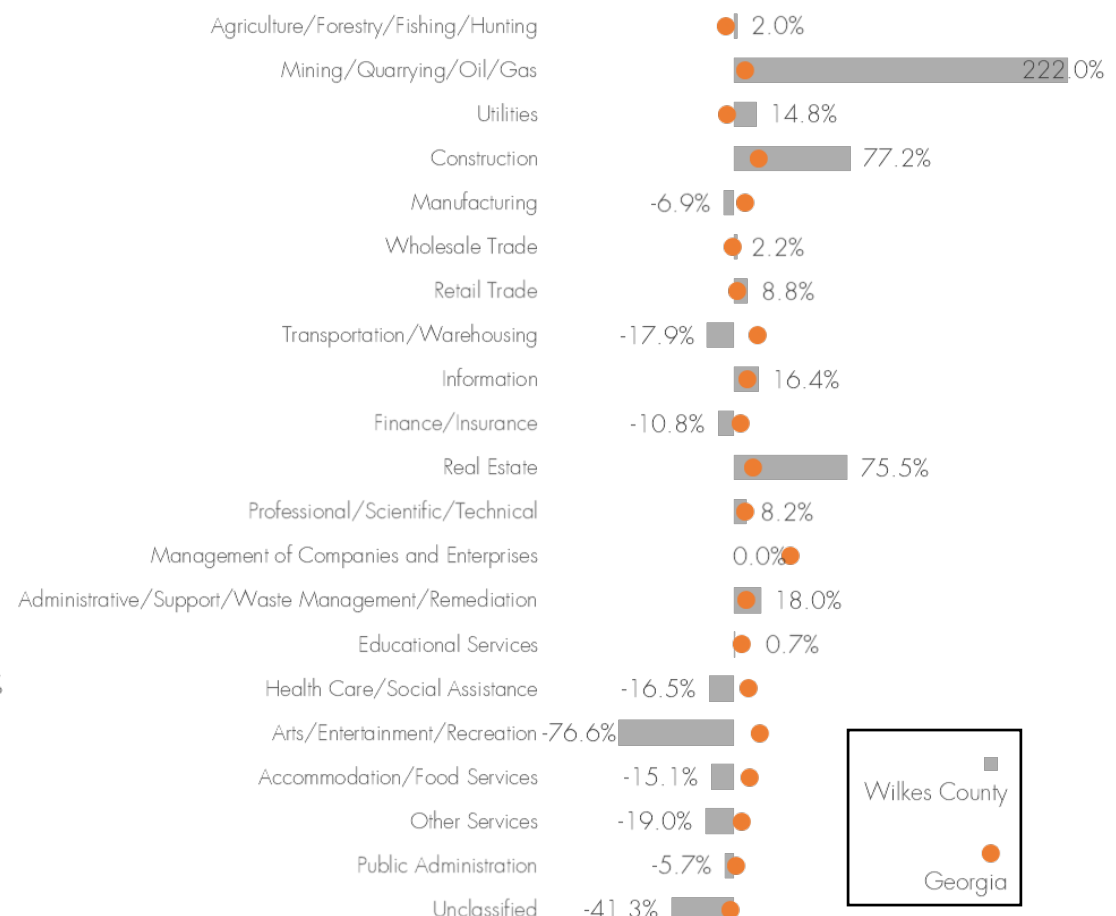
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EMPLOYMENT BY INDUSTRY, 2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

EMPLOYMENT CHANGE BY INDUSTRY, 2015-2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

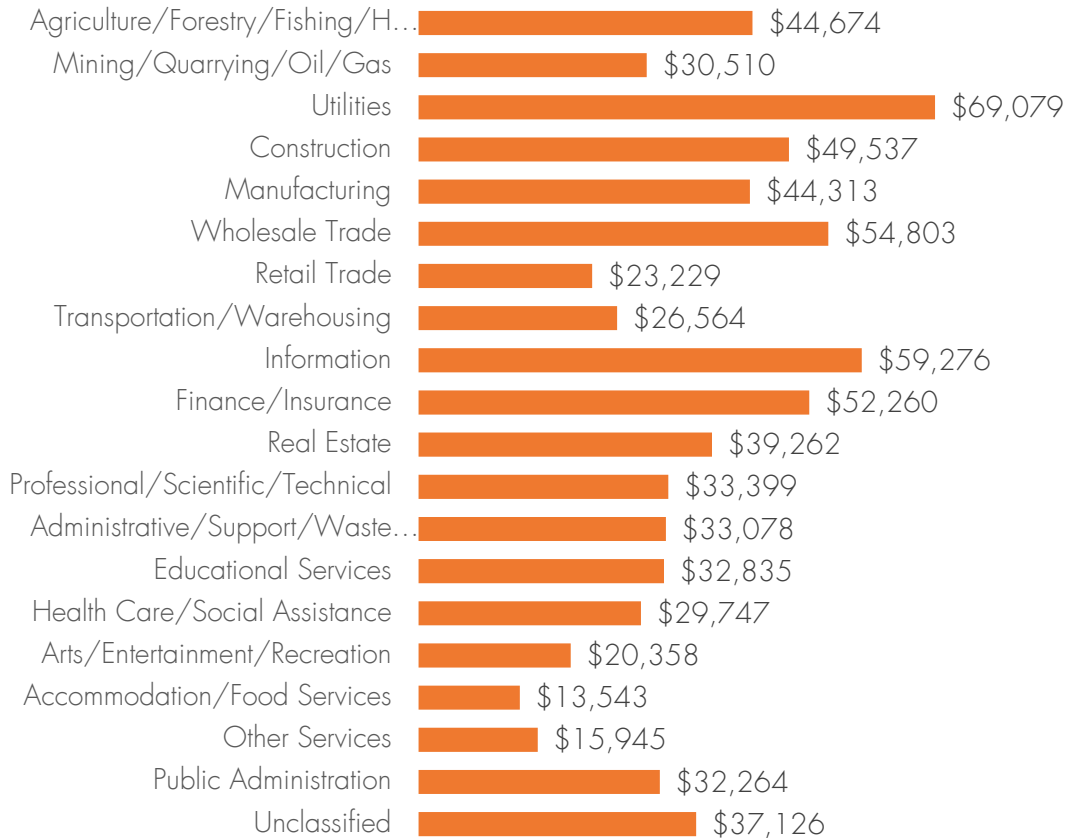
# Industry Salaries

The average annual wages for a worker in Wilkes County is \$35,862, which is less than the Georgia (\$53,266) and United States (\$57,413) averages. Average wages vary widely in Wilkes County depending on the industry. The Agriculture / Forestry / Fishing / Hunting industry average wage is 109% the United States average, indicating a potential high demand for workers.

## WHY IS THIS IMPORTANT?

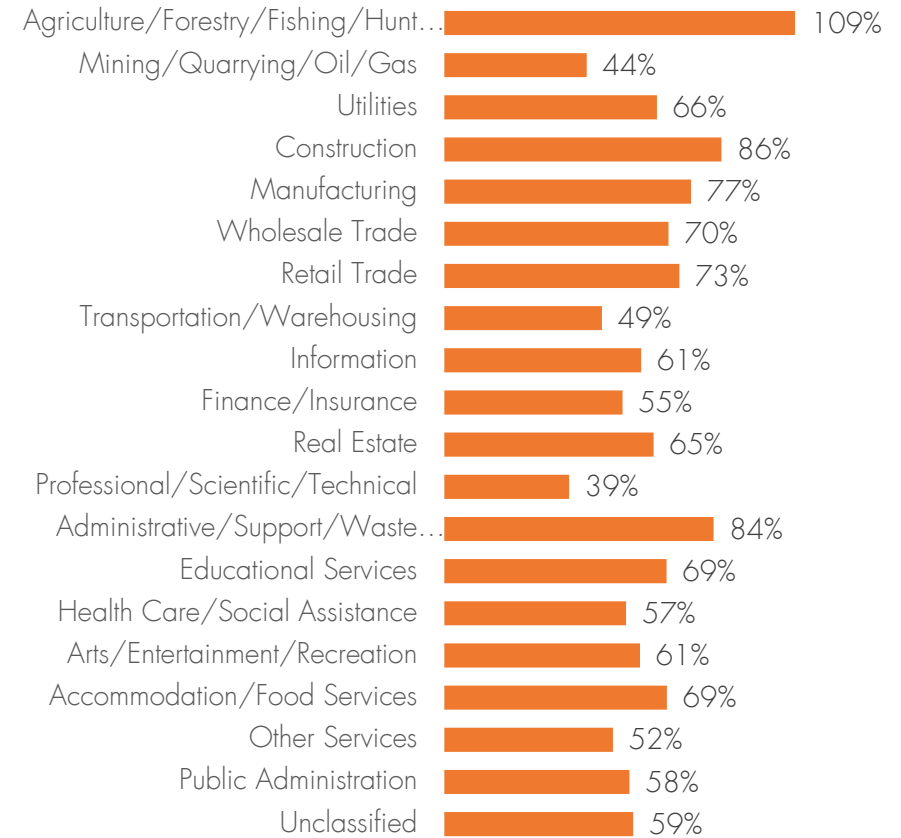
Examining salaries by industry helps reveal which local industries are more competitive for workers or where workers show higher productivity. Above-average salaries may indicate high demand for those workers in a community. The presence of high-salary industries is also a sign of positive wealth creation in a community.

AVERAGE ANNUAL WAGES BY INDUSTRY, WILKES COUNTY, 2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

AVERAGE ANNUAL WAGES BY INDUSTRY, WILKES COUNTY AS A PERCENTAGE OF UNITED STATES, 2019



Source: ECG / JobsEQ / U.S Bureau of Labor Statistics

# Top Employers

## WHY IS THIS IMPORTANT?

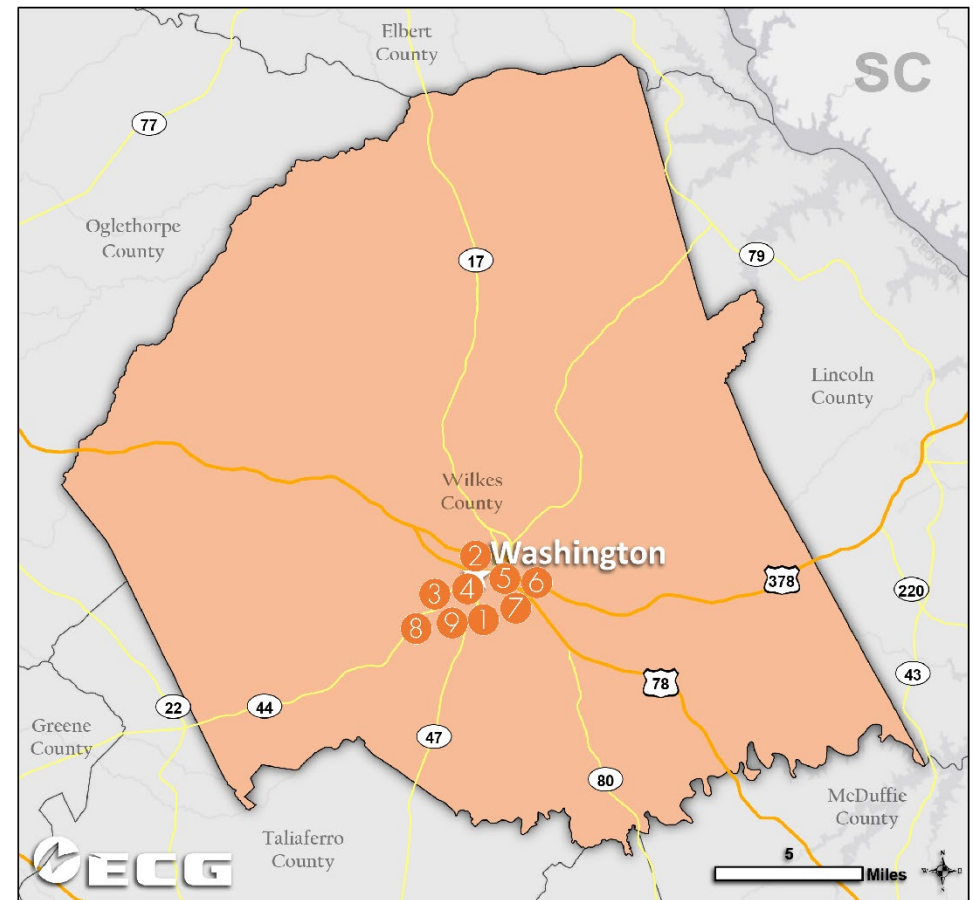
The top employers in Wilkes County include three wood suppliers, a plastic supplier, a general contractor, and a home nursing care service. Within the Wilkes County Region, the top employers include a wood supplier, three plastic suppliers, a carpet fiber and yarn supplier, a poultry processor, a granite supplier and a home nursing care service.

Top employers have a symbiotic relationship with communities and show which kinds of businesses have the potential to do well in a community.

TOP TEN LARGEST EMPLOYERS, WILKES COUNTY, 2019

1	<b>Anthony Forest Products Co.</b>	<i>plywood supplier</i>
2	<b>Barnett Southern Corporation</b>	<i>general contractor</i>
3	<b>Burt Lumber Co., Inc.</b>	<i>lumber supplier</i>
4	<b>CSRA Private Duty, Inc.</b>	<i>home nursing care</i>
5	<b>F&amp;M Bank</b>	<i>bank</i>
6	<b>Ingles Markets, Inc.</b>	<i>grocery store</i>
7	<b>McDonalds</b>	<i>fast food restaurant</i>
8	<b>Pliant Corporation</b>	<i>plastic fabrication</i>
9	<b>Wood Specialty Co.</b>	<i>wood product supplier</i>

Source: Georgia Department of Labor



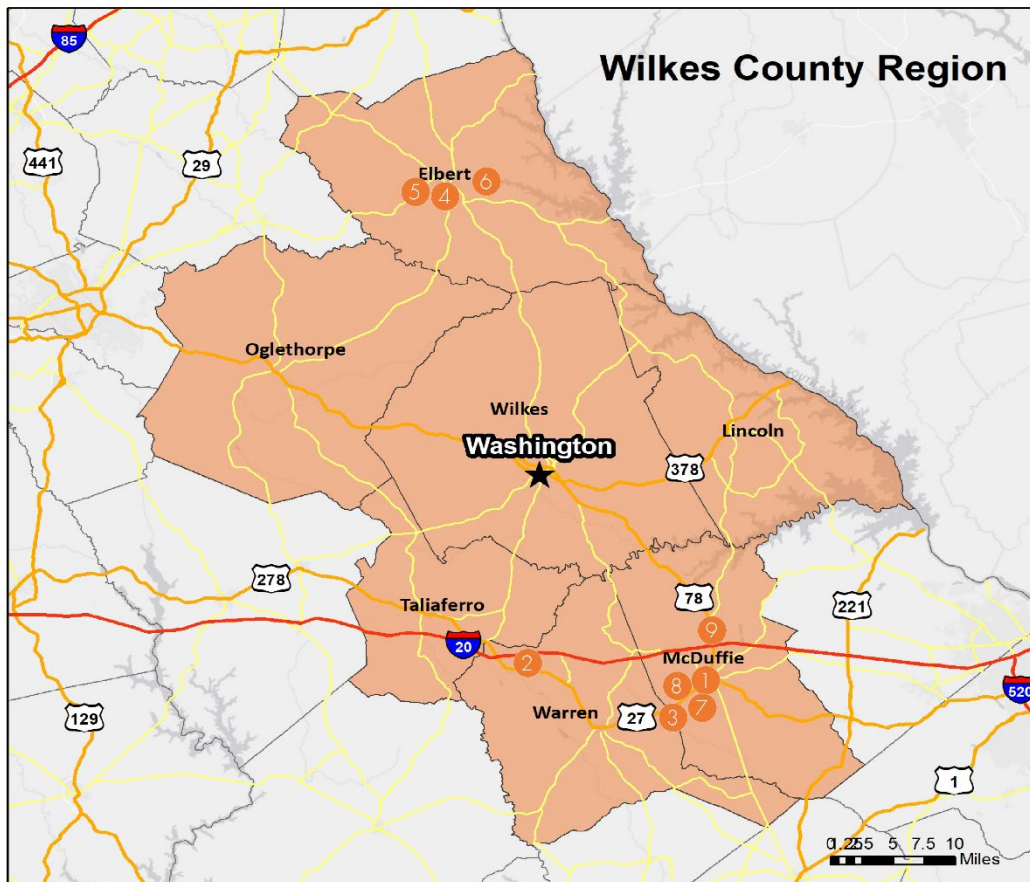
Note: Represents employment covered by unemployment insurance excluding all government agencies except correctional institutions, state and local hospitals, state colleges, and universities. Data shown for the third quarter of 2019. Employers are listed alphabetically by area, not by the number of employees. Number of employees is not reported to protect anonymity.

# Top Employers

## WHY IS THIS IMPORTANT?

The top employers in Wilkes County include three wood suppliers, a plastic supplier, a general contractor, and a home nursing care service. Within the Wilkes County Region, the top employers include a wood supplier, three plastic suppliers, a carpet fiber and yarn supplier, a poultry processor, a granite supplier and a home nursing care service.

Top employers have a symbiotic relationship with communities and show which kinds of businesses have the potential to do well in a community.



TOP TEN LARGEST EMPLOYERS, WILKES COUNTY REGION, 2019

1	Family Care, Inc. (McDuffie Co.)	home nursing care
2	Georgia-Pacific Wood Products (Warren Co.)	wood products supplier
3	H.P. Pelzer, Inc. (McDuffie Co.)	plastic fabrication (auto)
4	Matthews Granite Company (Elbert Co.)	granite supplier
5	Mollertech South, LLC (Elbert Co.)	plastic fabrication
6	Pilgrim's Pride Corporation (Elbert Co.)	poultry processor
7	Shaw Industries Group, Inc. (McDuffie Co.)	carpet fiber and yarn supplier
8	Thomson Plastics, Inc. (McDuffie Co.)	plastic fabrication
9	Walmart (McDuffie Co.)	general retail store

Source: Georgia Department of Labor

Note: Represents employment covered by unemployment insurance excluding all government agencies except correctional institutions, state and local hospitals, state colleges, and universities. Data shown for the third quarter of 2019. Employers are listed alphabetically by area, not by the number of employees. Number of employees is not reported to protect anonymity.

# Location Quotients

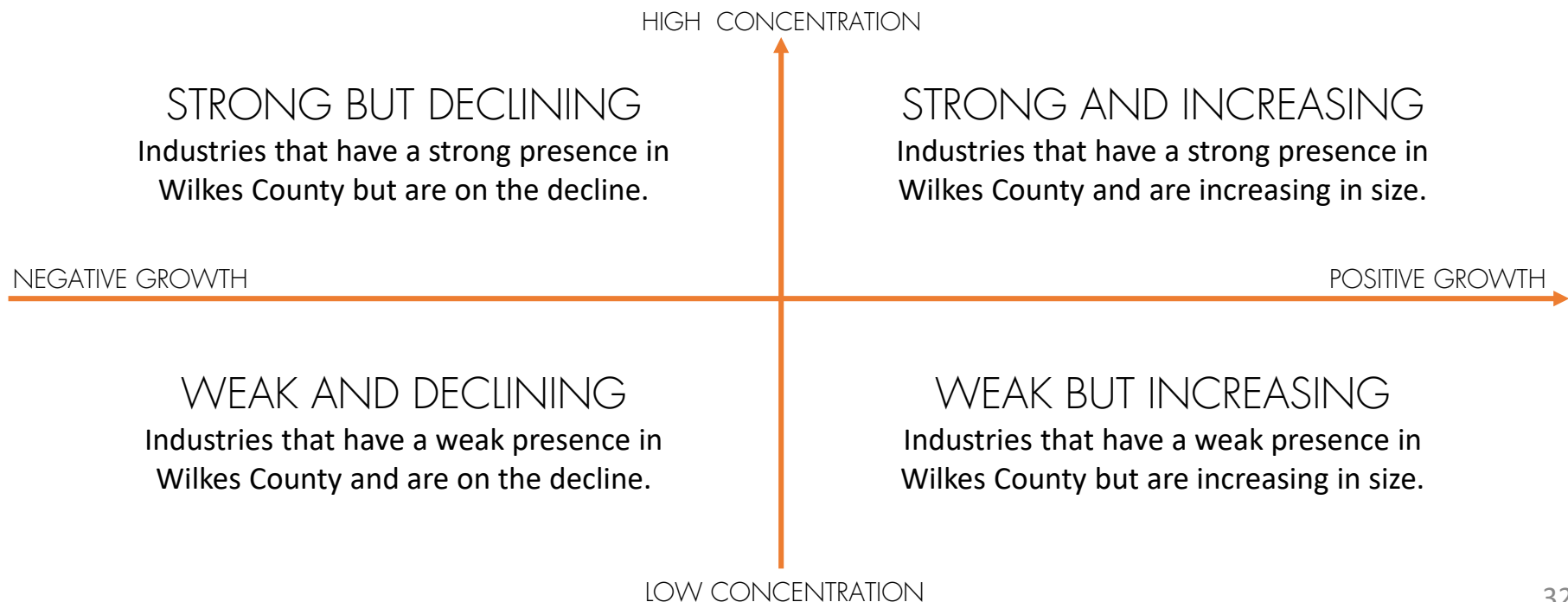
Identifying a community's most concentrated and specialized industries is a crucial component of implementing an economic development strategy. Businesses often prefer to locate in communities where their industry and complementary industries already have a strong presence.

Location quotients, or LQs, are a measure of the relative concentration or density of a specific industry in a community or region compared to the US average for that industry. An LQ of 1 indicates that a community has exactly the same industry concentration as the United States does as a whole. An LQ of greater than 1 indicates a higher concentration than the US average, and an LQ of less than 1 indicates a lower concentration than the US average.

The bubble charts on the following pages illustrate:

- The LQ growth for each industry along the horizontal axis
- The LQ of each industry along the vertical axis
- The size of each bubble represents the number of employees within the industry

$$LQ = \frac{\left(\frac{\text{Industry Employment}}{\text{Total Employment}}\right)_{\text{community}}}{\left(\frac{\text{Industry Employment}}{\text{Total Employment}}\right)_{\text{nation}}}$$

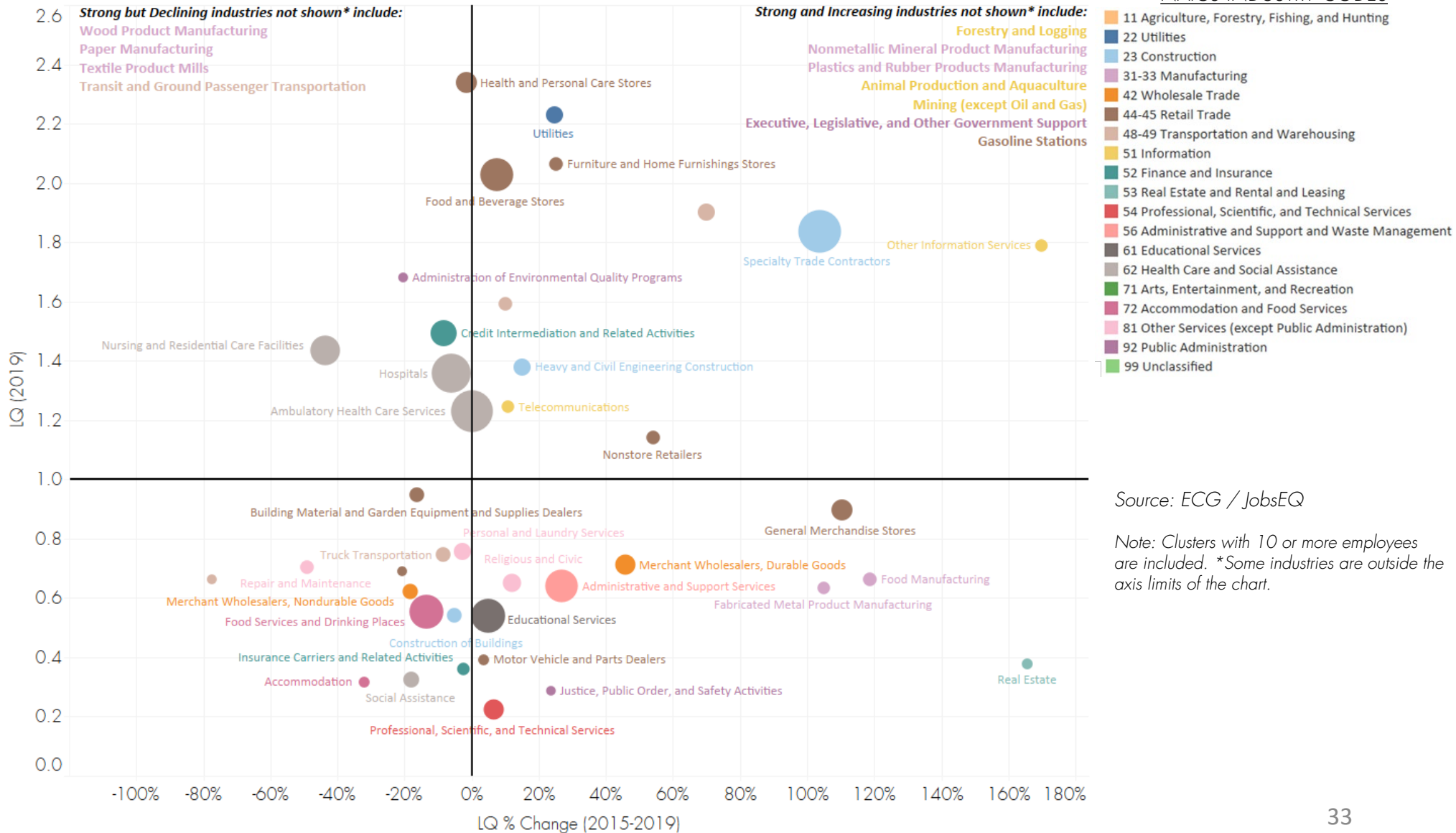




# Industry Concentrations: Wilkes County, Georgia

Some health care industries have lost jobs in the past five years but still have a strong presence in Wilkes County. The most concentrated industries in Wilkes County relative to the US average that are also experiencing growth include Forestry and Logging, Plastics and Rubber Product Manufacturing, Nonmetallic Mineral Product Manufacturing (such as granite), Mining, Animal Production, and Specialty Trade Contractors. Notable industries with a weak but increasing presence include Food Manufacturing and Fabricated Metal Product Manufacturing.

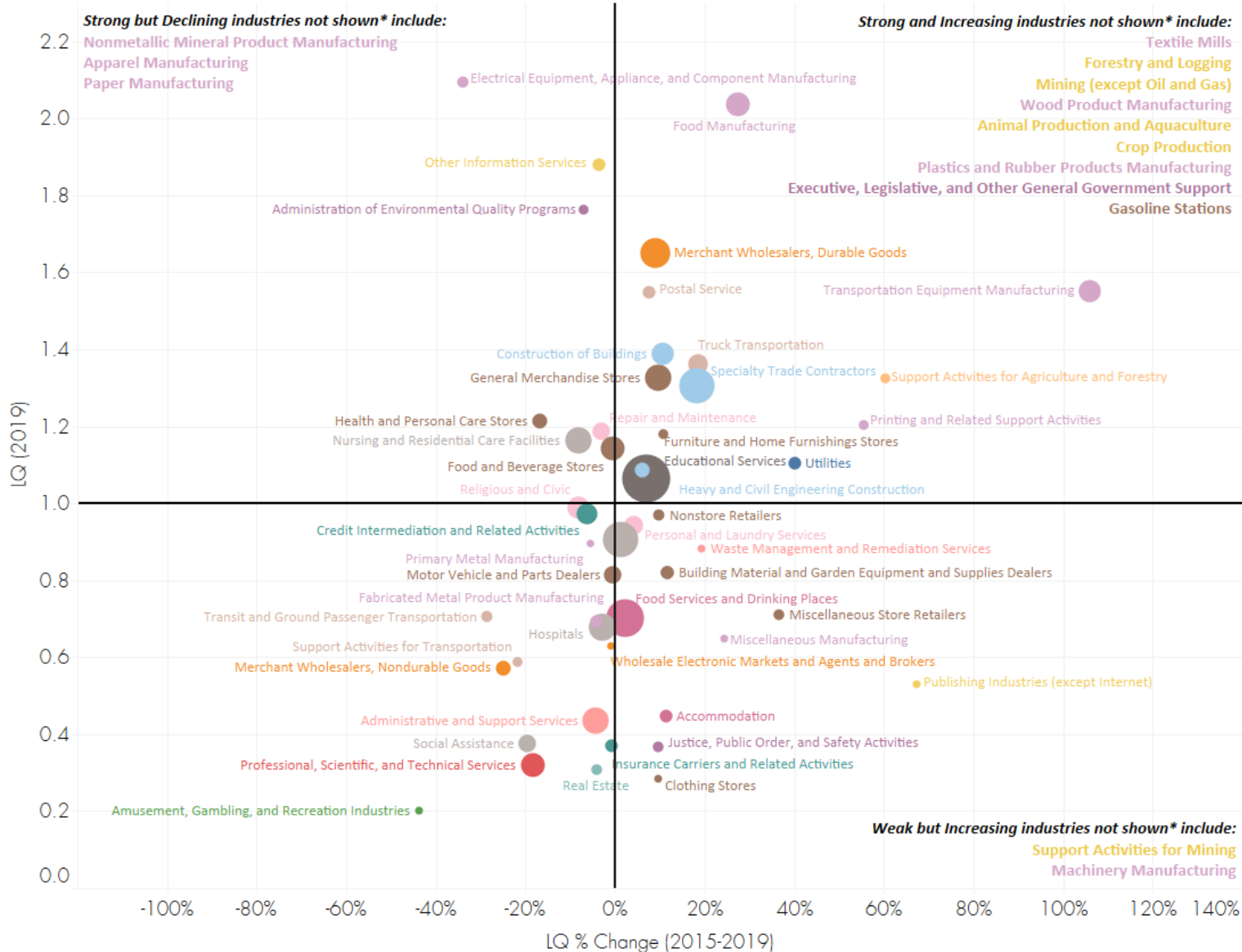
INDUSTRY CLUSTERS, WILKES COUNTY, 2019



# Industry Concentrations: Wilkes County Region

In the Wilkes County Region, which includes Wilkes and its surrounding contiguous counties, the most concentrated industries that have gained jobs in the past five years include Forestry and Logging, Mining, Animal Production, Crop Production, Textile Mills, Food Manufacturing, Wood Product Manufacturing, Plastics and Rubber Products Manufacturing, Specialty Trade Contractors, and Educational Services. Industries with a strong presence that have lost jobs in the past five years include Nonmetallic Mineral Product Manufacturing, Apparel Manufacturing, and Paper Manufacturing. Notable industries with a weak but increasing presence include Machinery Manufacturing and Support Activities for Mining.

INDUSTRY CLUSTERS, WILKES COUNTY REGION, 2019



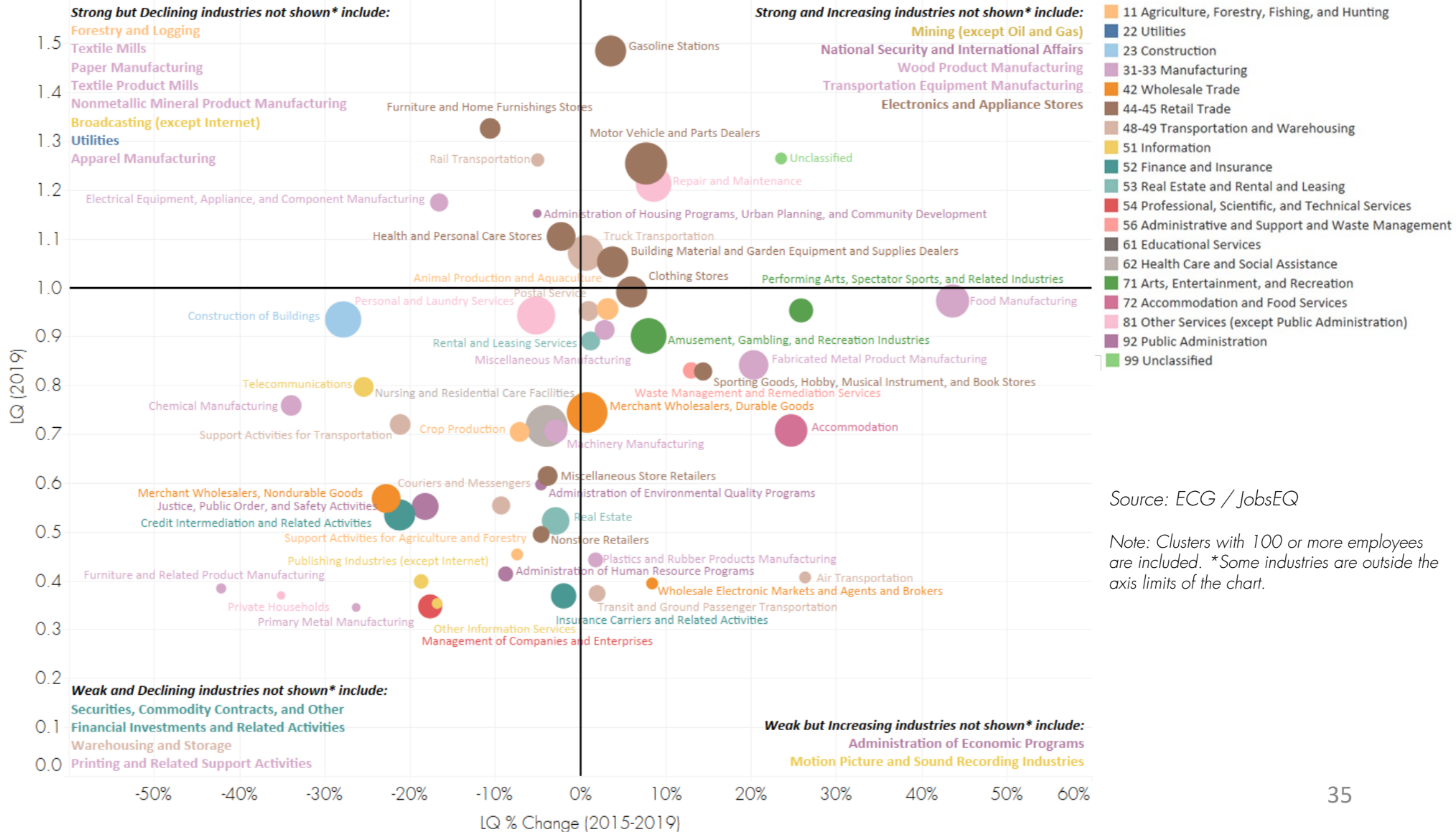
Source: ECG / JobsEQ

Note: Clusters with 50 or more employees are included. \*Some industries are outside the axis limits of the chart.

# Industry Concentrations: Region 7

In Region 7, which is defined on page 4, the most concentrated industries that have gained jobs in the past five years include Mining, Wood Product Manufacturing, Transportation Equipment Manufacturing, and National Security and International Affairs (primarily in Augusta). Industries with a strong presence that have lost jobs in the past five years include Forestry and Logging, Textile Mills, Textile Product Mills, Paper Manufacturing, Nonmetallic Mineral Product Manufacturing, Apparel Manufacturing, and Utilities. Notable industries with a weak but increasing presence include Food Manufacturing, Motion Picture and Sound Recording Industries, Fabricated Metal Product Manufacturing, Accommodation, and Plastics and Rubber Products Manufacturing.

INDUSTRY CLUSTERS, REGION 7, 2019



# Industry Key Takeaways

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01

*Wilkes County's strong and increasing industries include Forestry and Logging, Mining, Animal Production, Plastics and Rubber Manufacturing, and Nonmetallic Mineral Product Manufacturing.*

Weak but increasing industries include Food Manufacturing and Fabricated Metal Manufacturing. Strong but declining industries include Wood Product Manufacturing, Paper Manufacturing, and Textile Product Mills.

---

02

*The average annual wage for all industries in Wilkes County is \$35,862. The highest paid industries are Utilities (\$69,079), Information (\$59,276), and Wholesale Trade (\$54,803).*

The highest paid industry in Wilkes County relative to the United States is Agriculture, Forestry, Fishing, and Hunting, which at an average annual wage of \$44,674 pays 109% of the United States average for that industry. No other industries pay a higher wage than the United States average.

---

03

*The top employers in Wilkes County include three wood suppliers, a plastic supplier, a general contractor, and a home nursing care service.*

Within the Wilkes County Region, the top employers include a wood supplier, three plastic suppliers, a carpet fiber and yarn supplier, a poultry processor, a granite supplier and a home nursing care service.

The background of the slide is a green-tinted photograph of a city street. On the left, there is a building with a prominent dome. In the center, a building has a sign that reads "FITZPATRICK" and "1899". On the right, there is a large, ornate fountain with water spraying upwards. The overall scene is a mix of urban architecture and public art.

# Target Industry Recommendations

This section summarizes the recommended City of Washington target industries and details the methodology used to arrive at them, along with their alignment with State of Georgia target industries.

# Target Industry Identification Methodology

Selecting target industries uses both quantitative and qualitative information to identify targets that offer the best fit for a community based on local strengths, needs, and preferences.

To select the target industries, the following five questions were used to evaluate potential industries:

1. Is the industry growing within Wilkes County, the Wilkes County Region, and Region 7? *(quantitative)*  
*Investing in, attracting, and retaining industries that are growing or have growth potential is a good use of finite resources for communities since they offer a better return on investment and better chance of success.*

2. Does the industry have a presence within Wilkes County or regionally? *(quantitative)*  
*Industries with a presence in Wilkes County offer opportunities for expansion and recruitment and reveal the competitive advantages of the community.*





3. Does the industry match Wilkes County's strengths? *(quantitative and qualitative)*  
*The Washington-Wilkes County Labor Study and this Target Industry Study identify a set of competitive assets and opportunities in Washington and Wilkes County. Potential target industries were selected, in part, based on their compatibility with these strengths.*

4. Does the industry have a correspondence with Georgia's target industries? *(qualitative)*  
*We emphasized target industries that had a similar or compatible industry with a statewide target industry. The State of Georgia has invested considerable resources in marketing its target industries worldwide so aligning with this marketing effort is an efficient way to combine forces and amplify positive results.*

5. Does the industry align with Washington's and Wilkes County's goals and visions? *(qualitative)*  
*Industries that do not align with Washington's and Wilkes County's goals for economic development are not a good fit.*

# Target Industry Recommendations

Based on the methodology laid out on page 43, ECG Office of Economic and Community Development recommends four main target industries and twelve industry subsectors for the City of Washington. The profiles in the following section provide additional detail about each target and why they make sense for Washington and Wilkes County.

	TARGET INDUSTRY	INDUSTRY SECTORS
	<b>Wood Products</b>	<b>Forestry and Logging</b> <b>Wood Product Manufacturing</b> <b>Paper Manufacturing</b>
	<b>Agriculture</b>	<b>Animal Production and Aquaculture</b> <b>Crop Production</b> <b>Food Manufacturing</b>
	<b>Textiles</b>	<b>Textile Mills</b> <b>Textile Product Mills</b> <b>Apparel Manufacturing</b>
	<b>Transportation Manufacturing &amp; Suppliers</b>	<b>Transportation Equipment Manufacturing</b> <b>Plastics and Rubber Products Manufacturing</b> <b>Fabricated Metal Product Manufacturing</b>

# State of Georgia Target Industries

The Georgia Department of Economic Development (GDEcD) has identified several target industries for the State of Georgia as the focus of recruitment and retention. The state works together in alignment with statewide, regional, and local partners to market Georgia to the world. By aligning with the state's marketing initiatives, the recruiting power of the efforts of each stakeholder is amplified and tells the story of Georgia as a powerful marketing force.

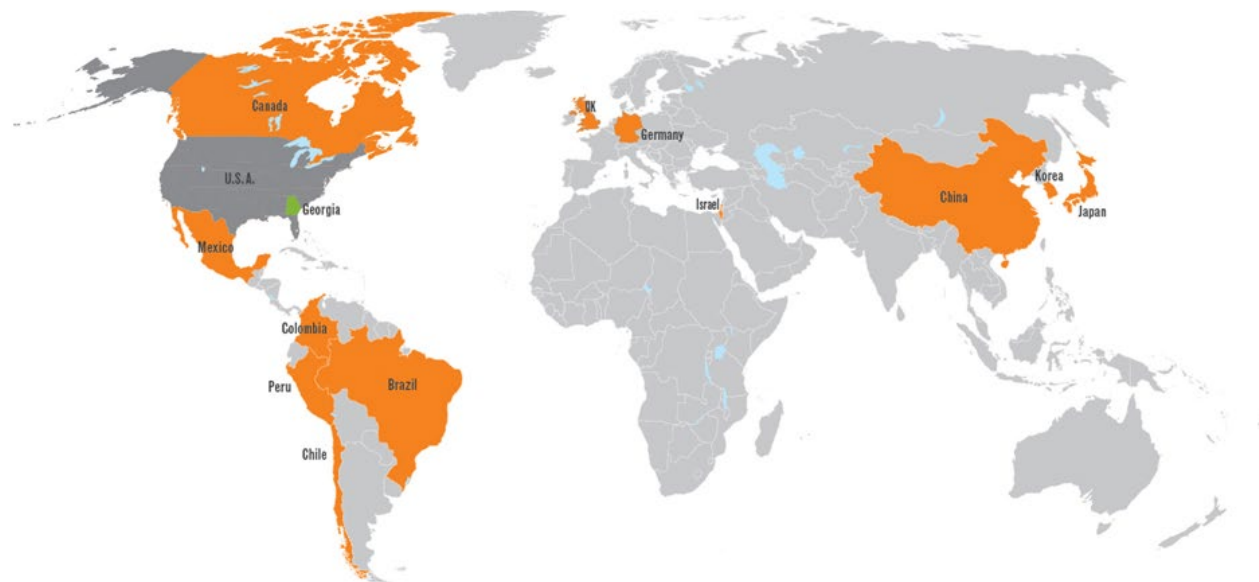
## STATE OF GEORGIA TARGET INDUSTRIES

Aerospace	Automotive	Energy	Headquarters	Manufacturing
Agribusiness	Corporate Innovation Centers	Film & Entertainment	Life Sciences	Technology
Arts	Defense	Food Processing	Logistics & Supply Chain	Tourism

## Statewide Economic Development Partners



GDEcD International Offices





# Target Industry Alignment

Economic development activities are supported by more than the City of Washington. It is important to consider how each target industry fits into the statewide target industries. Not every statewide target industry aligns perfectly with Washington's targets. By aligning targets as well as possible, Washington can leverage marketing and other resources provided by the state.

CITY OF WASHINGTON TARGET

STATE OF GEORGIA TARGET

<b>Wood Products</b>	<b>Agribusiness</b>
	<b>Manufacturing</b>
<b>Agriculture</b>	<b>Agribusiness</b>
	<b>Food Processing</b>
<b>Textiles</b>	<b>Manufacturing</b>
<b>Transportation Manufacturing &amp; Suppliers</b>	<b>Automotive</b>
	<b>Manufacturing</b>



# Target Industry Profiles

The profiles in this section provide greater detail about each of the City of Washington's target industries and their industry subsectors. Each profile includes an overview of the target industry and highlight the current regional employers in that industry, recent employment trends, and wages. The profiles also highlight workforce available in Wilkes County and the surrounding region.

# Wood Products



## Wood Products

Forestry and Logging  
Wood Product Manufacturing  
Paper Manufacturing



# Wood Products

## INDUSTRY OVERVIEW

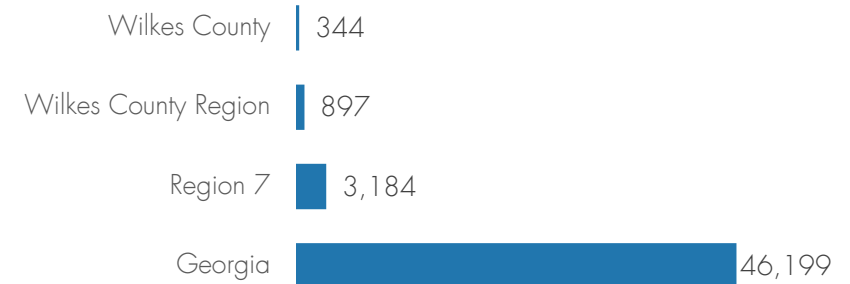
The Wood Products industry is concerned with forestry, logging, timber trade, and the production of forest products, timber, lumber, primary forest and wood products such as furniture and secondary products like wood pulp for the pulp and paper industry. The Wood Products industry has a particularly strong presence in the State of Georgia and the region surrounding Washington, Georgia, in particular, due to the state's abundance of forestland and the presence of major wood product and paper product manufacturing companies. Major Wood Industry employers in Wilkes County include Anthony Forest Products, Burt Lumber Co., and Wood Specialty Co.

Wood Products operations require the presence of skilled labor, either in forestry or manufacturing. Proximity to interstates or rail access is preferable for Wood Products companies in order to facilitate the delivery of both raw materials and finished products. Wood Products Manufacturing and Paper Products Manufacturing operations may also require sizable electric, natural gas, water, and wastewater capacity.

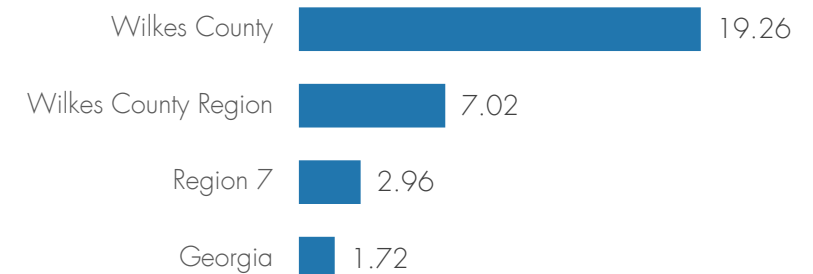
Washington is located on Highway 78, making it **easily accessible to the interstate system** that connects to the Port of Savannah and other points of interest. Georgia Woodlands Railroad is a 17-mile-long, short line **railroad that connects to the national rail network** via the CSX rail line between Atlanta and Augusta. The railroad regularly hauls lumber, wood chips, pulpwood, among other forest products. Washington also has a **municipally-owned airport** with a 4,020-foot runway. The City of Washington is an **enterprise city that provides electric, water, and wastewater utilities**. Natural gas is also available via other providers.

Washington has **abundant forest and land suitable for industrial development**, as well as access to a **sizeable regional workforce** with skills applicable to Wood Products industry operations.

## EMPLOYMENT, 2019



## LOCATION QUOTIENT, 2019



## AVERAGE ANNUAL WAGE, 2019



Source: ECG / JobsEQ

# Wood Products

## INDUSTRY SUBSECTORS

### **Forestry and Logging**

Industries in the Forestry and Logging subsector grow and harvest timber on a long production cycle (i.e., of 10 years or more). Long production cycles use different production processes than short production cycles, which require more horticultural interventions prior to harvest, resulting in processes more similar to those found in the Crop Production subsector. Consequently, Christmas tree production and other production involving production cycles of less than 10 years, are classified in the Crop Production subsector. Industries in this subsector specialize in different stages of the production cycle. Reforestation requires production of seedlings in specialized nurseries. Timber production requires natural forest or suitable areas of land that are available for a long duration. The maturation time for timber depends upon the species of tree, the climatic conditions of the region, and the intended purpose of the timber. The harvesting of timber (except when done on an extremely small scale) requires specialized machinery unique to the industry. Establishments gathering forest products, such as gums, barks, balsam needles, rhizomes, fibers, Spanish moss, and ginseng and truffles, are also included in this subsector.

### **Wood Product Manufacturing**

Establishments in the Wood Product Manufacturing subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile homes), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planing, shaping, laminating, and assembling wood products starting from logs that are cut into bolts, or lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and bolts that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills and wood preservation establishments, the establishments are grouped into industries mainly based on the specific products manufactured.

### **Paper Manufacturing**

Industries in the Paper Manufacturing subsector make pulp, paper, or converted paper products. The manufacturing of these products is grouped together because they constitute a series of vertically connected processes. More than one is often carried out in a single establishment. There are essentially three activities. The manufacturing of pulp involves separating the cellulose fibers from other impurities in wood or used paper. The manufacturing of paper involves matting these fibers into a sheet. The manufacturing of converted paper products involves converting paper and other materials by various cutting and shaping techniques and includes coating and laminating activities. The Paper Manufacturing subsector is subdivided into two industry groups, the first for the manufacturing of pulp and paper and the second for the manufacturing of converted paper products. Paper making is treated as the core activity of the subsector. Therefore, any establishment that makes paper (including paperboard), either alone or in combination with pulp manufacturing or paper converting, is classified as a paper or paperboard mill. Establishments that make pulp without making paper are classified as pulp mills. Pulp mills, paper mills and paperboard mills comprise the first industry group. Establishments that make products from purchased paper and other materials make up the second industry group, Converted Paper Product Manufacturing. This general activity is then subdivided based, for the most part, on process distinctions. Paperboard container manufacturing uses corrugating, cutting, and shaping machinery to form paperboard into containers. Paper bag and coated and treated paper manufacturing establishments cut and coat paper and foil. Stationery product manufacturing establishments make a variety of paper products used for writing, filing, and similar applications. Other converted paper product manufacturing includes, in particular, the conversion of sanitary paper stock into such things as tissue paper and disposable diapers. Excluded from this subsector are photosensitive papers. These papers are chemically treated and are classified in Industry 32599, All Other Chemical Product and Preparation Manufacturing.

# Wood Products




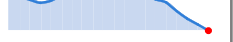
## SUPPLIER INDUSTRIES, WILKES COUNTY REGION, 2019

As of 2019Q4, business in the Wood Products industry in the Wilkes County Region are estimated to make \$156.1 million in annual purchases from suppliers in the United States with about 11% or \$17.8 million of these purchases being made from businesses located in the Wilkes County Region.

Top Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Paper Manufacturing	\$364.0	\$17,677.0
Chemical Manufacturing	\$37.0	\$11,024.0
Wood Product Manufacturing	\$6,081.0	\$4,846.0
Merchant Wholesalers, Durable Goods	\$541.0	\$10,001.0
Professional, Scientific, and Technical Services	\$397.0	\$9,282.0
Remaining Supplier Industries	\$10,419.0	\$85,439.0
<b>Total</b>	<b>\$17,839.0</b>	<b>\$138,269.0</b>

Source: ECG / JobsEQ

## TARGET INDUSTRY AND SUBSECTORS, WILKES COUNTY REGION, 2019

Target Industry and Subsectors	Employment	Avg. Ann. Wages	LQ*	5yr History	Annual Demand**	Forecast Ann. Growth
Wood Products Industry	897	\$43,111	7.02		86	-1.5%
Wood Product Manufacturing	482	\$39,066	7.69		49	-0.8%
Forestry and Logging	230	\$43,952	20.05		22	-2.4%
Paper Manufacturing	185	\$52,615	3.44		15	-2.4%

Source: ECG / JobsEQ

\*LQ stands for Location Quotient, which is a measure of industry concentration. Please see page 32 for the full definition of Location Quotient.

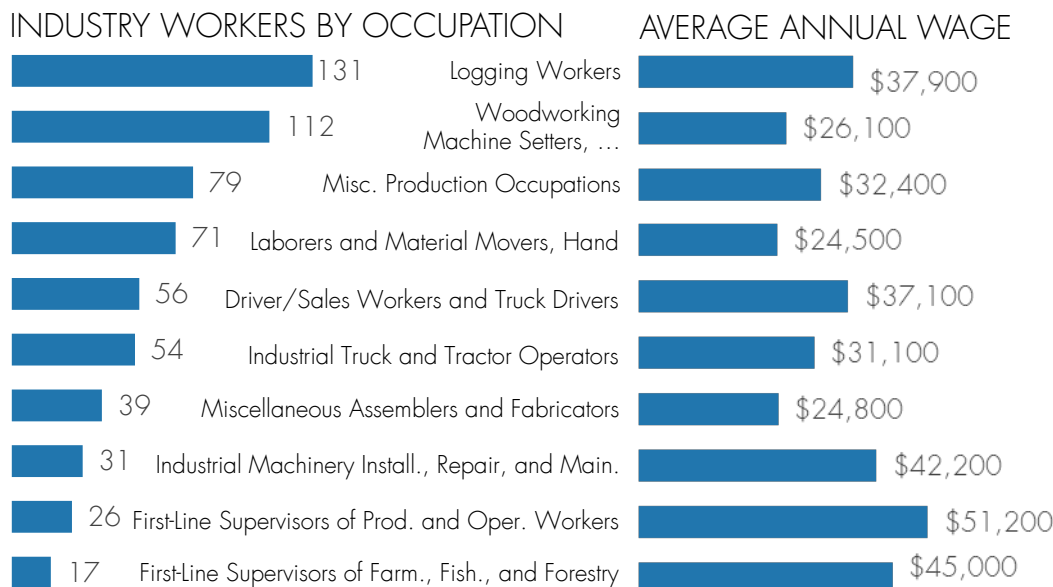
\*\*Annual demand is the number of jobs demanded in the industry over the course of a year. Demand is the sum of exits (people leaving the labor force from that industry – a negative value), transfers (people joining or leaving the industry – a positive or negative value), and employment growth (people entering the labor force in the industry – a positive value).

# Wood Products

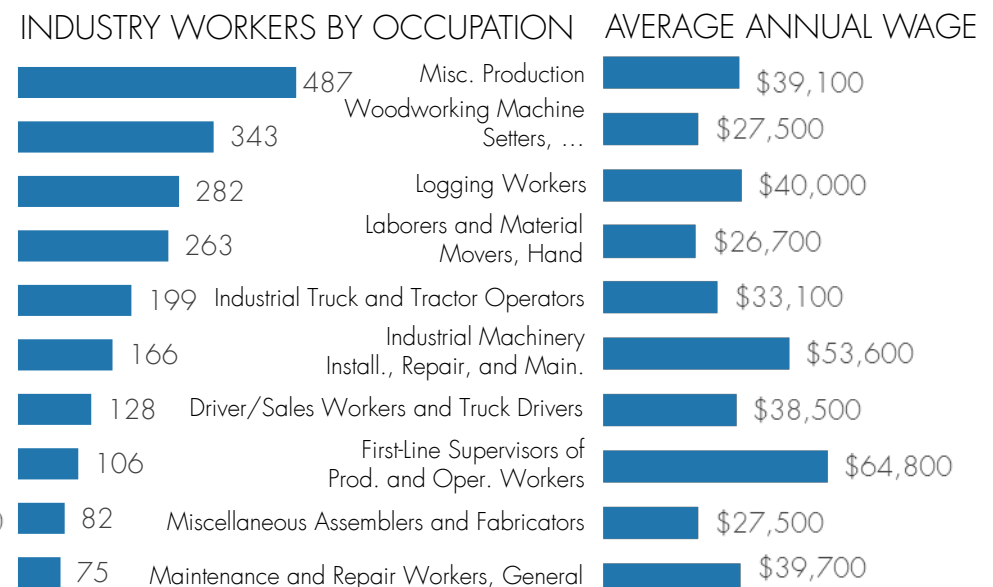
## REGIONAL WORKFORCE

Washington has access to a large Wood Products workforce, with 897 workers in supportive occupations in the Wilkes County Region and 3,184 workers in Region 7. The largest occupational category of available workers are from Miscellaneous Production Occupations; Woodworking Machine Setters, Operators, and Tenders; and Logging Workers.

### WILKES COUNTY REGION, 2019



### REGION 7, 2019

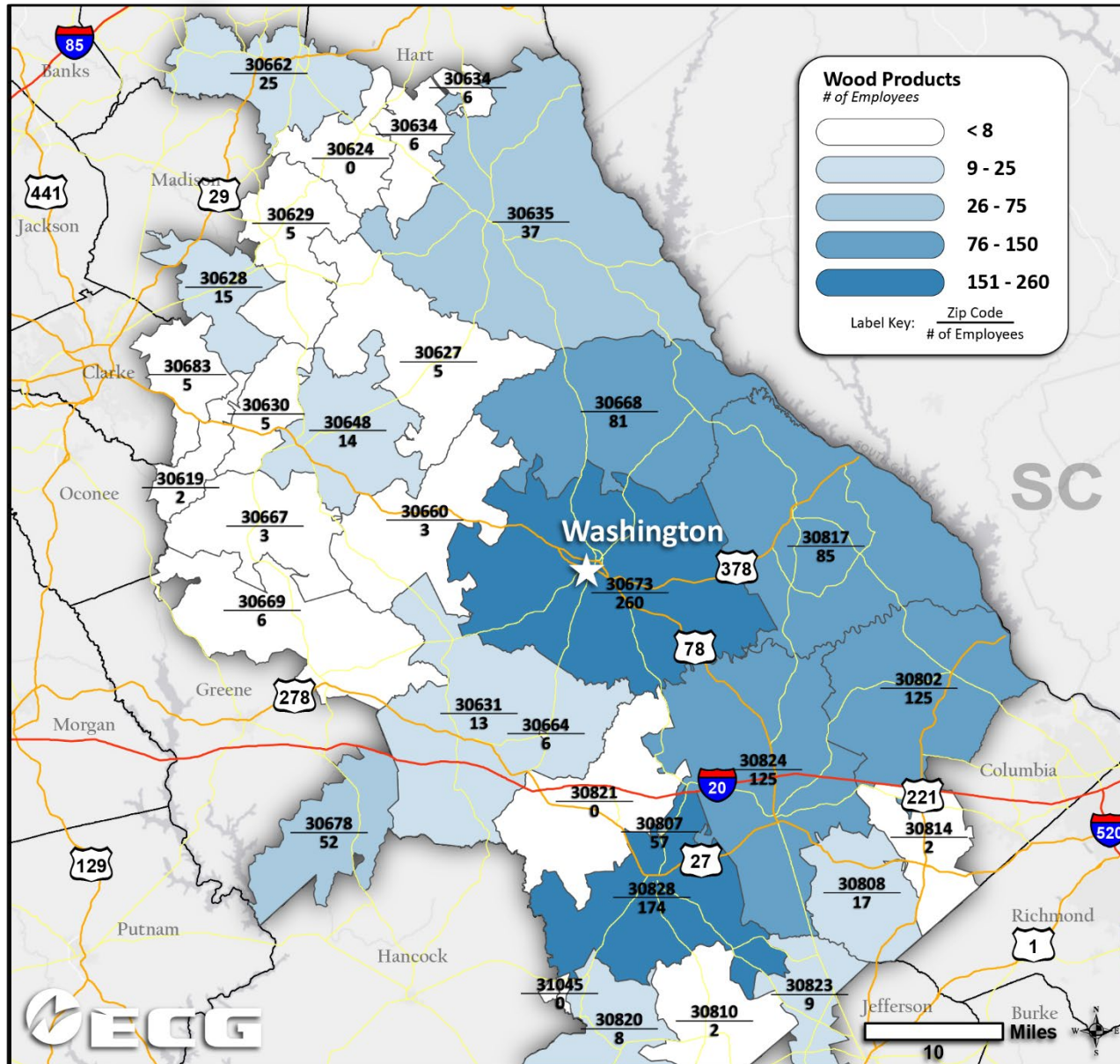


Source: ECG / JobsEQ

Note: The top 10 occupations in the Wood Industry are displayed for each region.

# Wood Products

## WILKES COUNTY REGION WOOD PRODUCTS INDUSTRY WORKFORCE BY ZIP CODE



Source: ECG / JobsEQ



# Agriculture



## Agriculture

**Animal Production and Aquaculture**  
**Crop Production**  
**Food Manufacturing**



# Agriculture

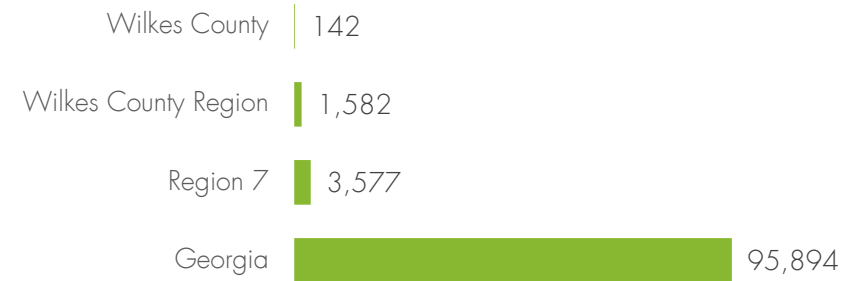
## INDUSTRY OVERVIEW

The Agriculture consists of three main subsectors within this report: Animal Production and Aquaculture, Crop Production, and Food Manufacturing. It is concerned with the raising of animals for food products, growing crops for animal and human consumption, and processing animal and plant crops into food products. **The region surrounding Washington, Georgia, is prime agricultural land.** Several major employers in the region and across the state are engaged in food processing, such as Pilgrim's Pride in Elbert County.

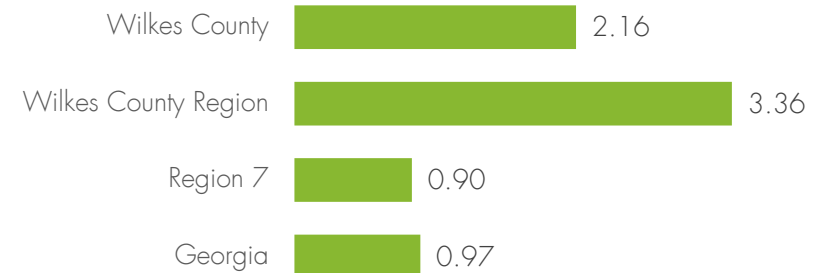
Agriculture operations require laborers for farm work or production laborers for food manufacturing operations. Proximity to interstates is important to transport crops, livestock, and animal products (such as milk or eggs) to food processors and to distribute final food products to consumers. Animal and Crop Production operations often have abundant water needs, and Food Manufacturers may have need of electric, natural gas, water, and wastewater capacity.

Washington is located on Highway 78, making it **easily accessible to the interstate system** that connects to the Port of Savannah and other points of interest. The City of Washington is **an enterprise city that provides electric, water, and wastewater utilities.** Natural gas is also available via other providers. **Agricultural workers in the region are abundant** and production workers in parallel fields possess **skills that are transferrable to food processing** operations.

## EMPLOYMENT, 2019



## LOCATION QUOTIENT, 2019



## AVERAGE ANNUAL WAGE, 2019



Source: ECG / JobsEQ

# Agriculture

## INDUSTRY SECTORS

### **Animal Production and Aquaculture**

Industries in the Animal Production and Aquaculture subsector raise or fatten animals for the sale of animals or animal products and/or raise aquatic plants and animals in controlled or selected aquatic environments for the sale of aquatic plants, animals, or their products. The subsector includes establishments, such as ranches, farms, and feedlots, primarily engaged in keeping, grazing, breeding, or feeding animals. These animals are kept for the products they produce or for eventual sale. The animals are generally raised in various environments, from total confinement or captivity to feeding on an open range pasture. The industries in this subsector are grouped by important factors, such as suitable grazing or pasture land, specialized buildings, type of equipment, and the amount and types of labor required. Establishments are classified in the Animal Production and Aquaculture subsector when animal production (i.e., value of animals for market) accounts for one-half or more of the establishment's total agricultural production. Establishments with one-half or more animal production with no one animal product or family of animal products of an industry accounting for one-half of the establishment's agricultural production are treated as combination animal farming classified in Industry 11299, All Other Animal Production.

### **Crop Production**

Industries in the Crop Production subsector grow crops mainly for food and fiber. The subsector comprises establishments, such as farms, orchards, groves, greenhouses, and nurseries, primarily engaged in growing crops, plants, vines, or trees and their seeds. The industries in this subsector are grouped by similarity of production activity, including biological and physiological characteristics and economic requirements, the length of growing season, degree of crop rotation, extent of input specialization, labor requirements, and capital demands. The production process is typically completed when the raw product or commodity grown reaches the "farm gate" for market, that is, at the point of first sale or price determination. Establishments are classified in the Crop Production subsector when crop production (i.e., value of crops for market) accounts for one-half or more of the establishment's total agricultural production. Within the subsector, establishments are classified in a specific industry when a product or industry family of products (i.e., oilseed and grain farming, vegetable and melon farming, fruit and tree nut farming) account for one-half or more of the establishment's agricultural production. Establishments with one-half or more crop production with no one product or family of products of an industry accounting for one-half of the establishment's agricultural production are treated as general combination crop farming and are classified in Industry 11199, All Other Crop Farming. Industries in the Crop Production subsector include establishments that own, operate, and manage and those that operate and manage. Those that manage only are classified in Subsector 115, Support Activities for Agriculture and Forestry. Establishments that raise aquatic plants in controlled or selected aquatic environments are classified in Subsector 112, Animal Production and Aquaculture.

### **Food Manufacturing**

Industries in the Food Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included. Establishments primarily engaged in manufacturing beverages are classified in Subsector 312, Beverage and Tobacco Product Manufacturing.

*Source: ECG/ Dun & Bradstreet*

# Agriculture



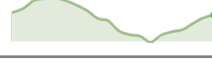
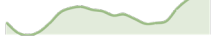
## SUPPLIER INDUSTRIES, WILKES COUNTY REGION, 2019

As of 2019Q4, Agriculture businesses in the Wilkes County Region are estimated to make \$210.4 million in annual purchases from suppliers in the United States with about 22% or \$46.7 million of these purchases being made from businesses located in the Wilkes County Region.

Top Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Food Manufacturing	\$17,409.0	\$23,047.0
Animal Production and Aquaculture	\$12,597.0	\$6,104.0
Merchant Wholesalers, Durable Goods	\$1,154.0	\$11,514.0
Truck Transportation	\$2,739.0	\$9,014.0
Chemical Manufacturing	\$134.0	\$10,376.0
Remaining Supplier Industries	\$12,643.0	\$103,642.0
<b>Total</b>	<b>\$46,676.0</b>	<b>\$163,697.0</b>

Source: ECG / JobsEQ

## TARGET INDUSTRY AND SUBSECTORS, WILKES COUNTY REGION, 2019

Target Industry and Subsectors	Employment	Avg. Ann. Wages	LQ*	5yr History	Annual Demand**	Forecast Ann. Growth
Agriculture	1,582	\$33,422	3.36		158	-0.7%
Crop Production	546	\$31,530	4.54		58	-0.3%
Animal Production and Aquaculture	538	\$46,786	5.05		44	-1.0%
Food Manufacturing	498	\$21,054	2.04		56	-0.7%

Source: ECG / JobsEQ

\*LQ stands for Location Quotient, which is a measure of industry concentration. Please see page 32 for the full definition of Location Quotient.

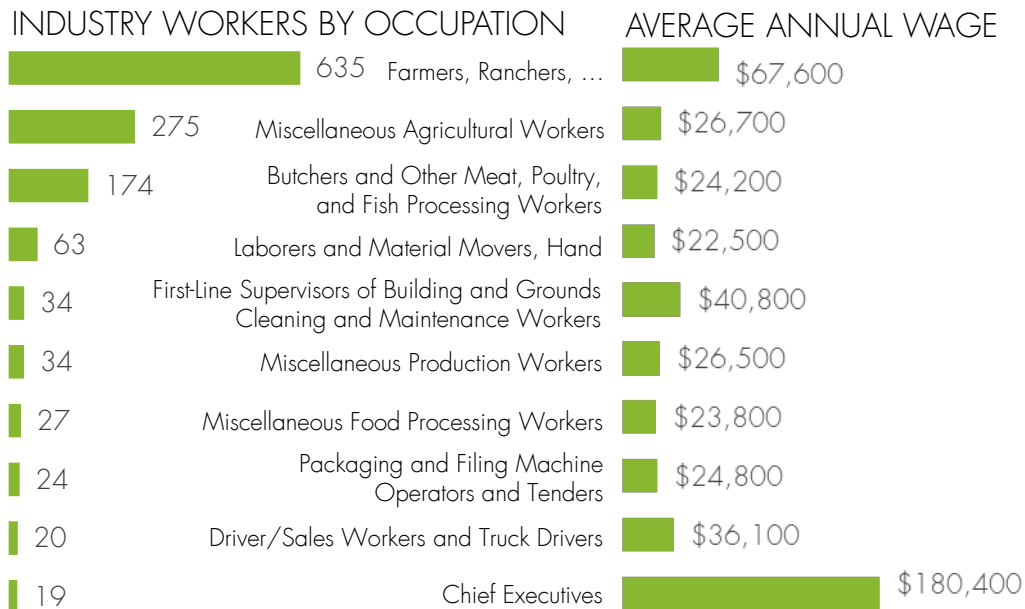
\*\*Annual demand is the number of jobs demanded in the industry over the course of a year. Demand is the sum of exits (people leaving the labor force from that industry – a negative value), transfers (people joining or leaving the industry – a positive or negative value), and employment growth (people entering the labor force in the industry – a positive value).

# Agriculture

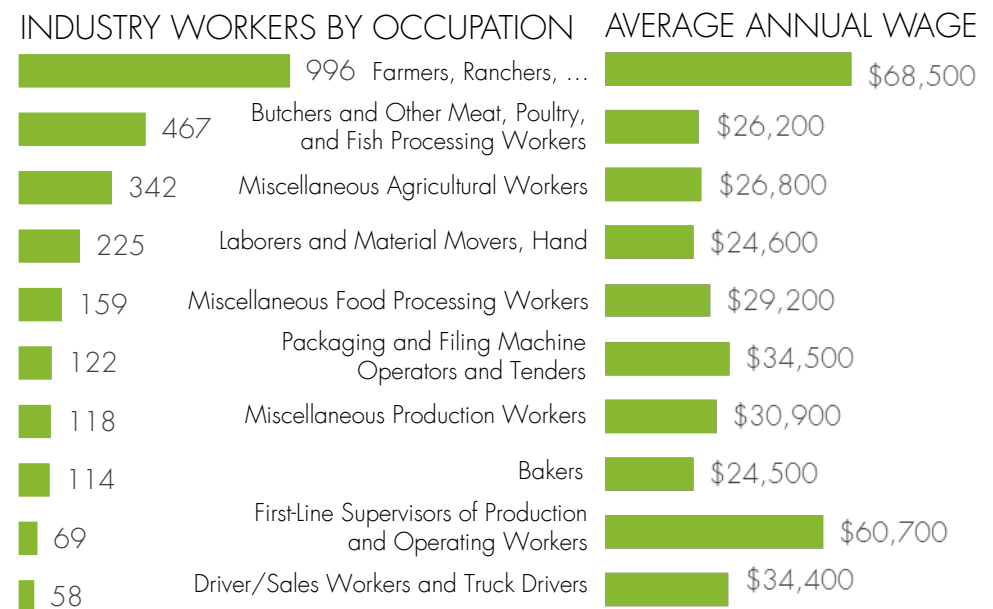
## REGIONAL WORKFORCE

The Wilkes County Region has a workforce of 1,582 Agriculture workers, while Region 7 has 3,577 Agriculture workers. The largest occupational categories are Farmers, Ranchers, and Other Agricultural Managers; Butchers and Other Meat, Poultry, and Fish Processing Workers; and Miscellaneous Agriculture Workers.

### WILKES COUNTY REGION, 2019



### REGION 7, 2019

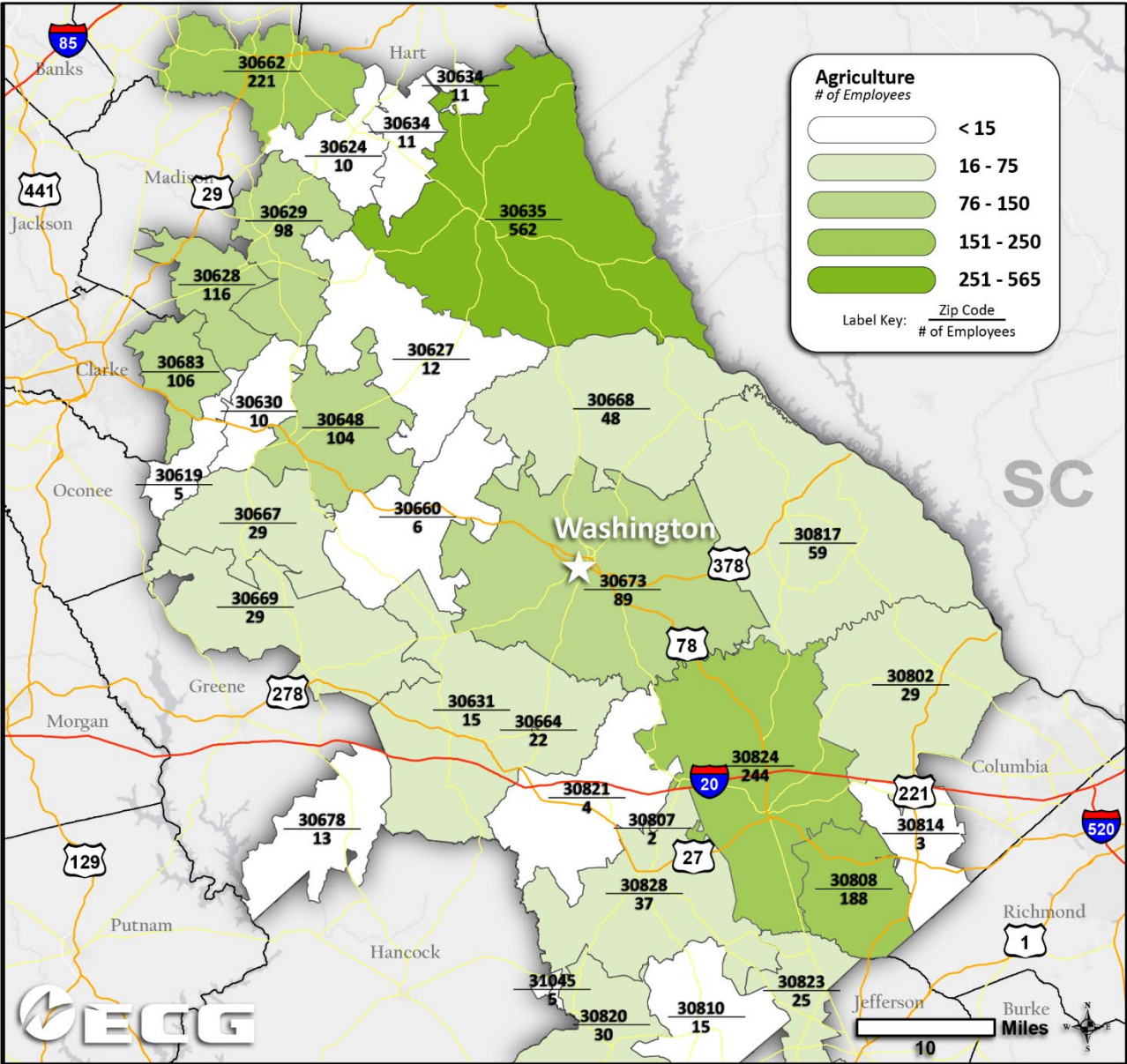


Source: ECG / JobsEQ

Note: The top 10 occupations in the Agriculture Industry are displayed for each region.

# Agriculture

## WILKES COUNTY REGION AGRICULTURE INDUSTRY WORKFORCE BY ZIP CODE



Source: ECG / JobsEQ

# Textiles



## Textiles

Textile Mills  
Textile Product Mills  
Apparel Manufacturing

# Textiles

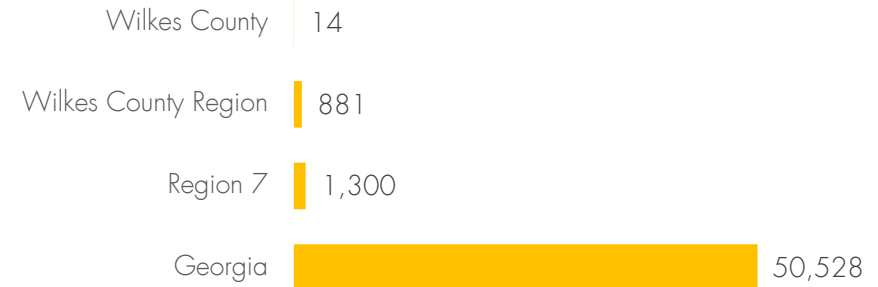
## INDUSTRY OVERVIEW

The Textiles industry is concerned with the manufacture of textile products such as yarn or fabric from natural or synthetic fibers and the manufacture of items made from textiles such as sheets, towels, or clothing. Skilled labor is important in Textiles operations, as is proximity to interstate access for the transport of intermediate or finished products to their next destination. Textiles operations often require abundant electric, natural gas, water, and wastewater capacity.

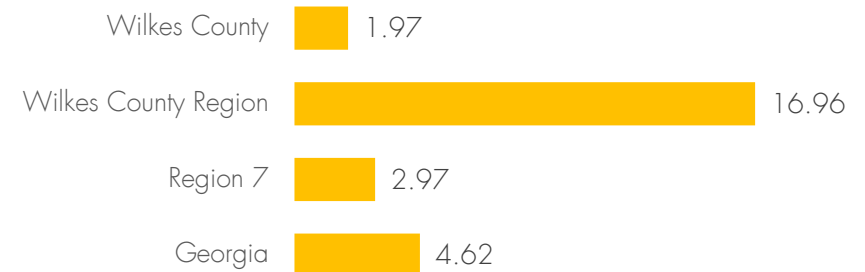
A major employer in the Textiles industry in the Wilkes County Region is Shaw Industries Group in McDuffie County, a carpet fiber and yarn supplier.

Washington is **easily accessible to the interstate system** that connects to the Port of Savannah and other points of interest. The City of Washington is an **enterprise city that provides electric, water, and wastewater utilities**. Natural gas is also available via other providers. A **skilled workforce is available** in the region with skills specific to the Textiles industry, and additional workforce is available with skills that are transferrable to Textile operations.

## EMPLOYMENT, 2019



## LOCATION QUOTIENT, 2019



## AVERAGE ANNUAL WAGE, 2019



Source: ECG / JobsEQ



## INDUSTRY SECTORS

### **Textile Mills**

Industries in the Textile Mills subsector group establishments that transform a basic fiber (natural or synthetic) into a product, such as yarn or fabric that is further manufactured into usable items, such as apparel, sheets, towels, and textile bags for individual or industrial consumption. The further manufacturing may be performed in the same establishment and classified in this subsector, or it may be performed at a separate establishment and be classified elsewhere in manufacturing. The main processes in this subsector include preparation and spinning of fiber, knitting or weaving of fabric, and the finishing of the textile. The NAICS structure follows and captures this process flow. Major industries in this flow, such as preparation of fibers, weaving of fabric, knitting of fabric, and fiber and fabric finishing, are uniquely identified. Texturizing, throwing, twisting, and winding of yarn contain aspects of both fiber preparation and fiber finishing and are classified with preparation of fibers rather than with finishing of fibers. NAICS separates the manufacturing of primary textiles and the manufacturing of textile products (except apparel) produced from purchased primary textiles, such as fabric. The manufacturing of textile products (except apparel) from purchased fabric is classified in Subsector 314, Textile Product Mills, and apparel from purchased fabric is classified in Subsector 315, Apparel Manufacturing. Excluded from this subsector are establishments that weave or knit fabric and make garments. These establishments are included in Subsector 315, Apparel Manufacturing.

### **Textile Product Mills**

Industries in the Textile Product Mills subsector group establishments that make textile products (except apparel). With a few exceptions, processes used by these establishments are generally cut and sew (i.e., purchasing fabric and cutting and sewing to make nonapparel textile products, such as sheets and towels).

### **Apparel Manufacturing**

Industries in the Apparel Manufacturing subsector group establishments with two distinct manufacturing processes: (1) cut and sew (i.e., purchasing fabric and cutting and sewing to make a garment) and (2) the manufacture of garments in establishments that first knit fabric and then cut and sew the fabric into a garment. The Apparel Manufacturing subsector includes a diverse range of establishments manufacturing full lines of ready-to-wear apparel and custom apparel: apparel contractors, performing cutting or sewing operations on materials owned by others; jobbers, performing entrepreneurial functions involved in apparel manufacturing; and tailors, manufacturing custom garments for individual clients. Knitting fabric, when done alone, is classified in the Textile Mills subsector, but when knitting is combined with the production of complete garments, the activity is classified in the Apparel Manufacturing subsector.

*Source: ECG/ Dun & Bradstreet*

# Textiles



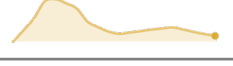

## SUPPLIER INDUSTRIES, WILKES COUNTY REGION, 2019

As of 2019Q4, Textiles in the Wilkes County Region are estimated to make \$133.4 million in annual purchases from suppliers in the United States with about 9% or \$12.2 million of these purchases being made from businesses located in the Wilkes County Region.

Top Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Chemical Manufacturing	\$37.0	\$42,307.0
Professional, Scientific, and Technical Services	\$380.0	\$7,683.0
Management of Companies and Enterprises	\$73.0	\$7,462.0
Textile Mills	\$4,630.0	\$2,802.0
Merchant Wholesalers, Durable Goods	\$288.0	\$5,581.0
Remaining Supplier Industries	\$6,824.0	\$55,307.0
<b>Total</b>	<b>\$12,232.0</b>	<b>\$121,142.0</b>

Source: ECG / JobsEQ

## TARGET INDUSTRY AND SUBSECTORS, WILKES COUNTY REGION, 2019

Target Industry and Subsectors	Employment	Avg. Ann. Wages	LQ*	5yr History	Annual Demand**	Forecast Ann. Growth
Textiles	881	\$41,447	16.96		67	-3.3%
Textile Mills	650	\$43,083	40.33		52	-3.1%
Apparel Manufacturing	191	\$38,558	10.19		12	-4.4%
Textile Product Mills	40	\$28,718	2.36		3	-2.2%

Source: ECG / JobsEQ

\*LQ stands for Location Quotient, which is a measure of industry concentration. Please see page 32 for the full definition of Location Quotient.

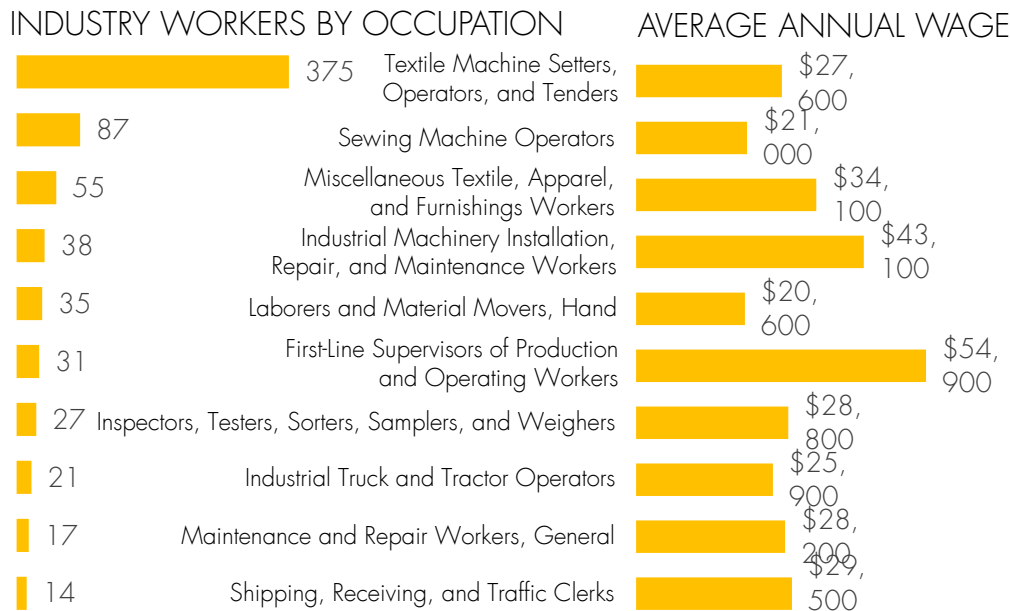
\*\*Annual demand is the number of jobs demanded in the industry over the course of a year. Demand is the sum of exits (people leaving the labor force from that industry – a negative value), transfers (people joining or leaving the industry – a positive or negative value), and employment growth (people entering the labor force in the industry – a positive value).

# Textiles

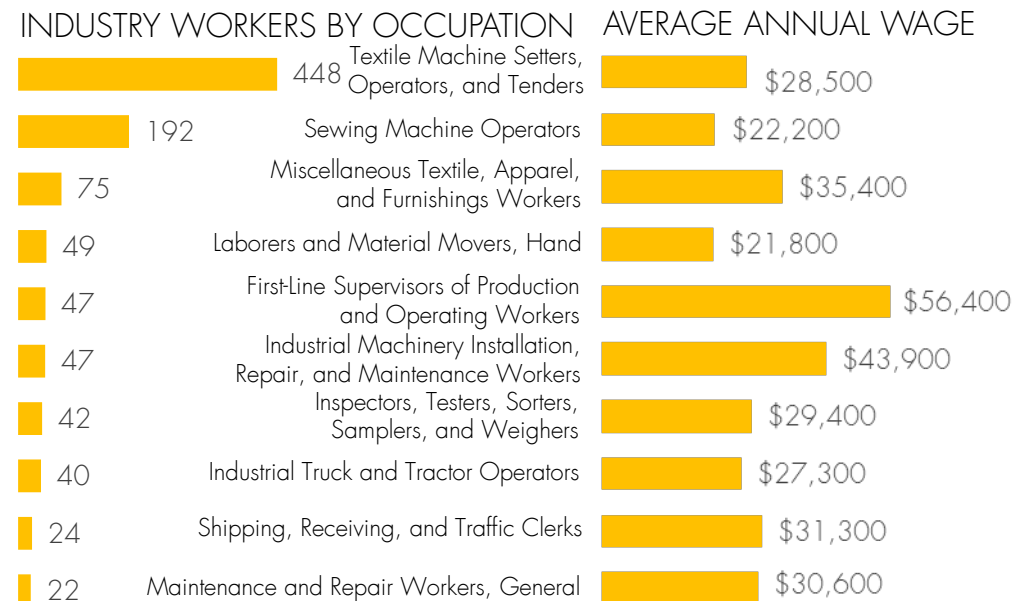
## REGIONAL WORKFORCE

Washington has access to a Textiles workforce of 881 workers in the Wilkes County Region and 1,300 workers in Region 7. The largest occupational category of available workers are from Textile Machine Setters, Operators, and Tenders; Sewing Machine Operators; and Miscellaneous Textile, Apparel, and Furnishings Workers.

### WILKES COUNTY REGION, 2019



### REGION 7, 2019

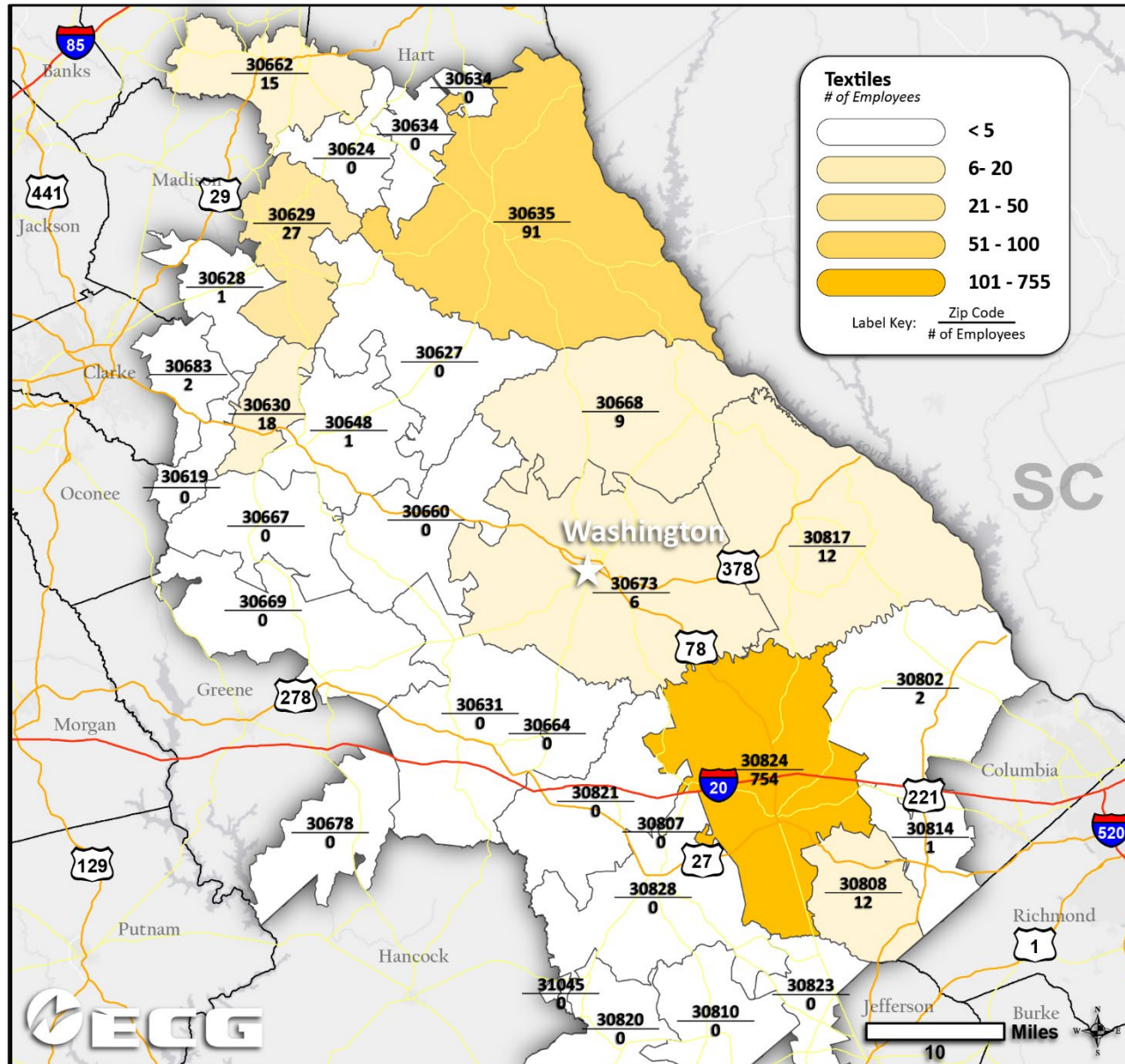


Source: ECG / JobsEQ

Note: The top 10 occupations in the Textiles Industry are displayed for each region.

# Textiles

## WILKES COUNTY REGION TEXTILES INDUSTRY WORKFORCE BY ZIP CODE



Source: ECG / JobsEQ

# Transportation Manufacturing & Suppliers



## Transportation Manufacturing & Suppliers

Transportation Equipment Manufacturing  
Plastics and Rubber Products Manufacturing  
Fabricated Metal Product Manufacturing



# Transportation Manufacturing & Suppliers

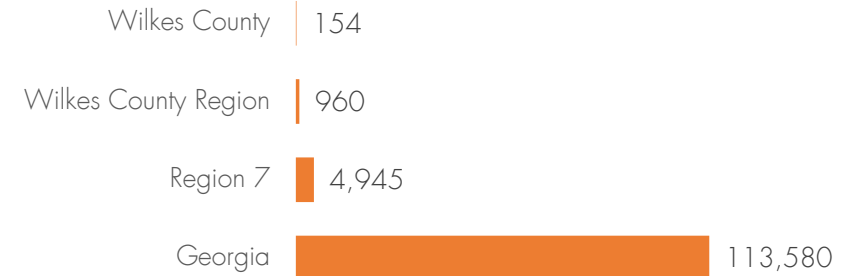
## INDUSTRY OVERVIEW

The Transportation Manufacturing & Suppliers industry is concerned with producing equipment for transporting people and goods such as cars, trucks, rail cars and lines, boats, and aircraft. Transportation Manufacturing & Suppliers operations require skilled labor in vehicle assembly, metal fabrication, plastic fabrication, and related occupations. Businesses include manufacturers of final transportation vehicles and the tier 1 and tier 2 suppliers for those manufacturers. Companies in this industry may require large utility capacity, particularly in electricity, but also in water, wastewater, and natural gas. Rail and interstate access may be required for Transportation Manufacturing & Suppliers operations. Washington is located on Highway 78, making it **easily accessible to the interstate system** that connects to the Port of Savannah and other points of interest. Georgia Woodlands Railroad is a 17-mile-long, short line **railroad that connects to the national rail network** via the CSX rail line between Atlanta and Augusta. The City of Washington is an **enterprise city that provides electric, water, and wastewater utilities**. Natural gas is also available via other providers.

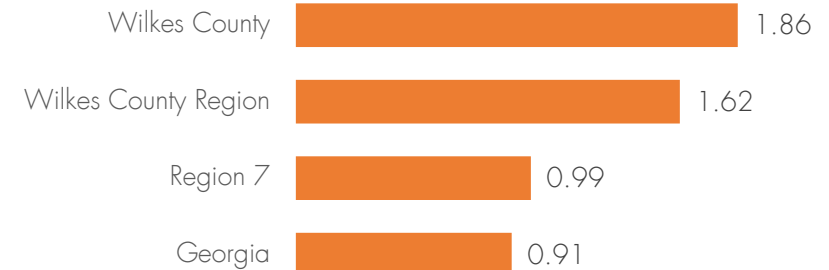
Georgia assemblers of final vehicle products include Blue Bird in Fort Valley (school buses) and Kia Motors Manufacturing in West Point (cars). Metal equipment and components manufacturers in Georgia include Hitachi Automotive Systems America, Honda Lock America, Honda Precision Parts of Georgia, Mando America Corporation, Sewon America, Toyota Industries Compressors, and ZF Gainesville. There are many additional manufacturers of plastic and rubber components for vehicles in Georgia including Decostar Industries, Daehan Solution Georgia, Freudenburg-NOK, Hyundai Dymos, Kumho Tire, Pirelli Tire, Sentury Tire, Nifco, Toyo Tire, and Yanseng Automotive Interiors. The Wilkes County Region is **home to several major employers where workers possess skills either directly applicable or easily transferrable to Transportation Manufacturing & Suppliers**. The Pliant Corporation in Wilkes County is a plastics fabricator, while H.P. Pelzer in McDuffie County is a plastic fabricator that makes auto components. The Kelsey Hayes Company in Warren County is a mechanical engineering company that works on auto components. Numerous companies in the wider region work on plastic fabrication or fabricated metal product manufacturing.

Source: ECG / Georgia Department of Economic Development

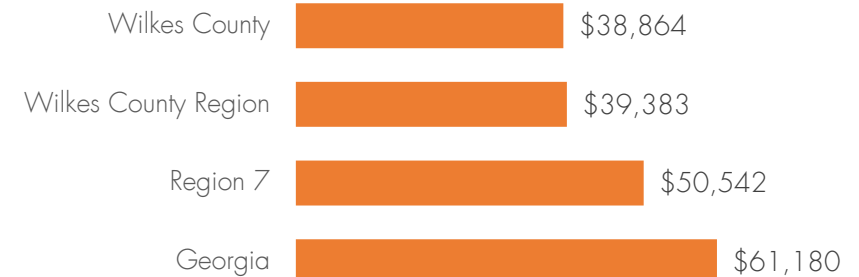
## EMPLOYMENT, 2019



## LOCATION QUOTIENT, 2019



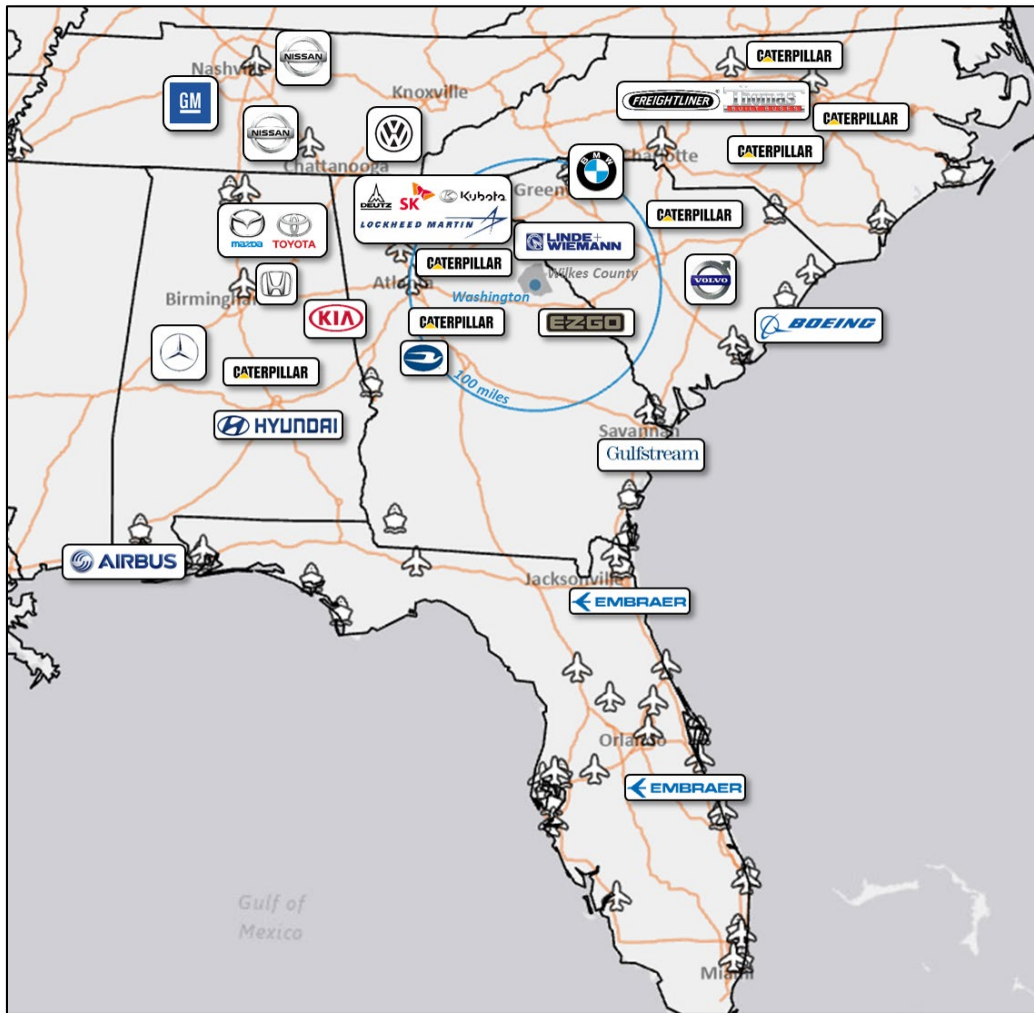
## AVERAGE ANNUAL WAGE, 2019



Source: ECG / JobsEQ

# Transportation Manufacturing & Suppliers

## TRANSPORTATION MANUFACTURING FACILITIES AND KEY SUPPLIERS



Source: ECG

Company	Location	Industry
Airbus	Mobile, AL	Aerospace Manufacturing
Bluebird	Fort Valley, GA	Bus Manufacturing
BMW	Greer, SC	Car Manufacturing
Boeing	North Charleston, SC	Aerospace Manufacturing
Caterpillar	Bogart, GA	Tractor & Building Equipment Manufacturing
Caterpillar	Sumter, SC	Tractor & Building Equipment Manufacturing
Caterpillar	Clayton, NC	Tractor & Building Equipment Manufacturing
Caterpillar	Sanford, NC	Tractor & Building Equipment Manufacturing
Caterpillar	Winston-Salem, NC	Tractor & Building Equipment Manufacturing
Caterpillar	Griffin, GA	Tractor & Building Equipment Manufacturing
Caterpillar	Montgomery, AL	Tractor & Building Equipment Manufacturing
Deutz Xchange	Pendergrass, GA	Engine Manufacturing
Embraer	Jacksonville, FL	Aerospace Manufacturing
Embraer	Melbourne, FL	Aerospace Manufacturing
EZ GO Textron	Augusta, GA	Golf Cart Manufacturing
Freightliner	Cleveland, NC	Truck Manufacturing
GM	Spring Hill, TN	Car Manufacturing
Gulfstream	Savannah, GA	Aerospace Manufacturing
Honda	Lincoln, AL	Car Manufacturing
Hyundai	Montgomery, AL	Car Manufacturing
KIA	West Point, GA	Car Manufacturing
Kubota	Gainesville, GA	Tractor Manufacturing
Kubota	Jefferson, GA	Tractor Manufacturing
Linde + Wiemann	Lavonia, GA	Auto Parts Manufacturing
Lockheed Martin	Marietta, GA	Aerospace Manufacturing
Mercedes	Vance, AL	Car Manufacturing
Nissan	Decherd, TN	Car Manufacturing
Nissan	Smyrna, TN	Car Manufacturing
SK Battery	Commerce, GA	Electric Car Battery Manufacturing
Thomas Built Buses	High Point, NC	Bus Manufacturing
Toyota / Mazda	Huntsville, AL	Car Manufacturing
Volvo	Ridgeville, SC	Car Manufacturing
VW	Chattanooga, TN	Electric Car Manufacturing

# Transportation Manufacturing & Suppliers

## INDUSTRY SECTORS

### **Transportation Equipment Manufacturing**

Industries in the Transportation Equipment Manufacturing subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery. An entire subsector is devoted to this activity because of the significance of its economic size in all three North American countries. Establishments in this subsector utilize production processes similar to those of other machinery manufacturing establishments, bending, forming, welding, machining, and assembling metal or plastic parts into components and finished products. However, the assembly of components and subassemblies and their further assembly into finished vehicles tends to be a more common production process in this subsector than in the Machinery Manufacturing subsector. NAICS has industry groups for the manufacture of equipment for each mode of transport, road, rail, air and water. Parts for motor vehicles warrant a separate industry group because of their importance and because they require less assembly than complete vehicles. Land use motor vehicle equipment not designed for highway operation (e.g., agricultural equipment, construction equipment, and material handling equipment) is classified in the appropriate NAICS subsector based on the type and use of the equipment.

### **Plastics and Rubber Products Manufacturing**

Industries in the Plastics and Rubber Products Manufacturing subsector make goods by processing plastics materials and raw rubber. The core technology employed by establishments in this subsector is that of plastics or rubber product production. Plastics and rubber are combined in the same subsector because plastics are increasingly being used as a substitute for rubber; however the subsector is generally restricted to the production of products made of just one material, either solely plastics or rubber. Many manufacturing activities use plastics or rubber, for example the manufacture of footwear or furniture. Typically, the production process of these products involves more than one material. In these cases, technologies that allow disparate materials to be formed and combined are of central importance in describing the manufacturing activity. In NAICS, such activities (footwear and furniture manufacturing) are not classified in the Plastics and Rubber Products Manufacturing subsector because the core technologies for these activities are diverse and involve multiple materials. Within the Plastics and Rubber Products Manufacturing subsector, a distinction is made between plastics and rubber products at the industry group level, although it is not a rigid distinction, as can be seen from the definition of Industry 32622, Rubber and Plastics Hoses and Belting Manufacturing. As materials technology progresses, plastics are increasingly being used as a substitute for rubber; and eventually, the distinction may disappear as a basis for establishment classification. In keeping with the core technology focus of plastics, lamination of plastics film to plastics film as well as the production of bags from plastics only is classified in this subsector. Lamination and bag production involving plastics and materials other than plastics are classified in Subsector 322, Paper Manufacturing.

### **Fabricated Metal Product Manufacturing**

Industries in the Fabricated Metal Product Manufacturing subsector transform metal into intermediate or end products, other than machinery, computers and electronics, and metal furniture, or treat metals and metal formed products fabricated elsewhere. Important fabricated metal processes are forging, stamping, bending, forming, and machining, used to shape individual pieces of metal; and other processes, such as welding and assembling, used to join separate parts together. Establishments in this subsector may use one of these processes or a combination of these processes. The NAICS structure for this subsector distinguishes the forging and stamping processes in a single industry. The remaining industries in the subsector group establishments based on similar combinations of processes used to make products. The manufacturing performed in the Fabricated Metal Product Manufacturing subsector begins with manufactured metal shapes. The establishments in this subsector further fabricate the purchased metal shapes into a product. For instance, the Spring and Wire Product Manufacturing industry starts with wire and fabricates such items. Within manufacturing there are other establishments that make the same products made by this subsector; only these establishments begin production further back in the production process. These establishments have a more integrated operation. For instance, one establishment may manufacture steel, draw it into wire, and make wire products in the same establishment. Such operations are classified in the Primary Metal Manufacturing subsector.

*Source: ECG/ Dun & Bradstreet*



# Transportation Manufacturing & Suppliers




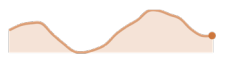
## SUPPLIER INDUSTRIES, WILKES COUNTY REGION, 2019

As of 2019Q4, Transportation Manufacturing & Suppliers in the Wilkes County Region are estimated to make \$211.2 million in annual purchases from suppliers in the United States with about 10% or \$20.3 million of these purchases being made from businesses located in the Wilkes County Region.

Top Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Chemical Manufacturing	\$0.2	\$30.7
Fabricated Metal Product Manufacturing	\$0.9	\$16.2
Transportation Equipment Manufacturing	\$9.4	\$5.6
Professional, Scientific, and Technical Services	\$0.5	\$11.4
Merchant Wholesalers, Durable Goods	\$0.6	\$11.3
Remaining Supplier Industries	\$8.7	\$115.6
<b>Total</b>	<b>\$20.3</b>	<b>\$190.9</b>

Source: ECG / JobsEQ

## TARGET INDUSTRY AND SUBSECTORS, WILKES COUNTY REGION, 2019

Target Industry and Subsectors	Employment	Avg. Ann. Wages	LQ*	5yr History	Annual Demand**	Forecast Ann. Growth
Transportation Manufacturing &	960	\$39,383	1.62		92	-0.7%
Transportation Equipment Manufacturing	406	\$43,539	1.55		39	-0.2%
Plastics and Rubber Products Manufacturing	400	\$37,105	3.71		38	-1.1%
Fabricated Metal Product Manufacturing	154	\$34,338	0.69		15	-0.8%

Source: ECG / JobsEQ

\*LQ stands for Location Quotient, which is a measure of industry concentration. Please see page 32 for the full definition of Location Quotient.

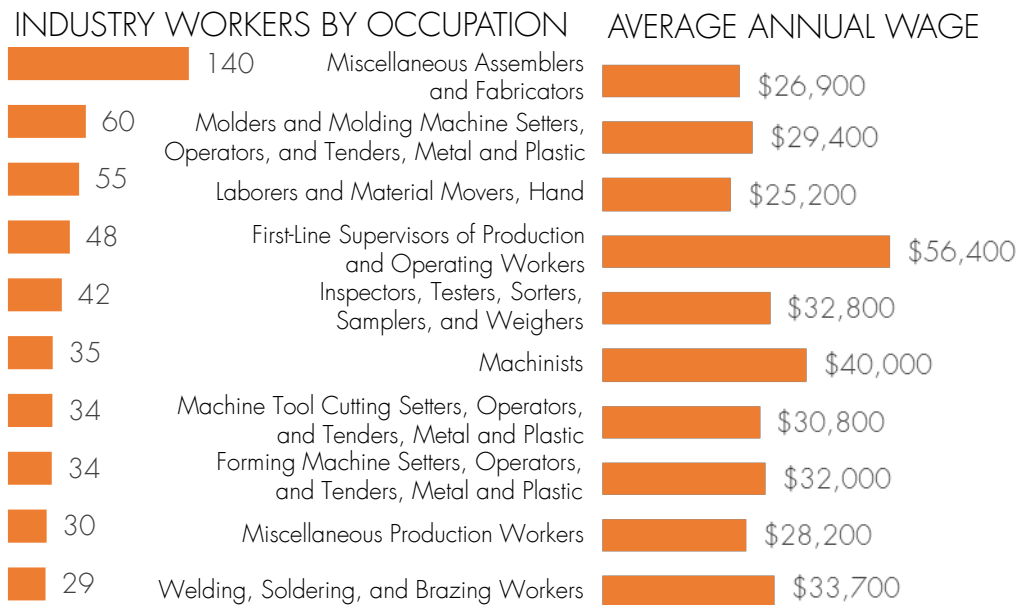
\*\*Annual demand is the number of jobs demanded in the industry over the course of a year. Demand is the sum of exits (people leaving the labor force from that industry – a negative value), transfers (people joining or leaving the industry – a positive or negative value), and employment growth (people entering the labor force in the industry – a positive value).

# Transportation Manufacturing & Suppliers

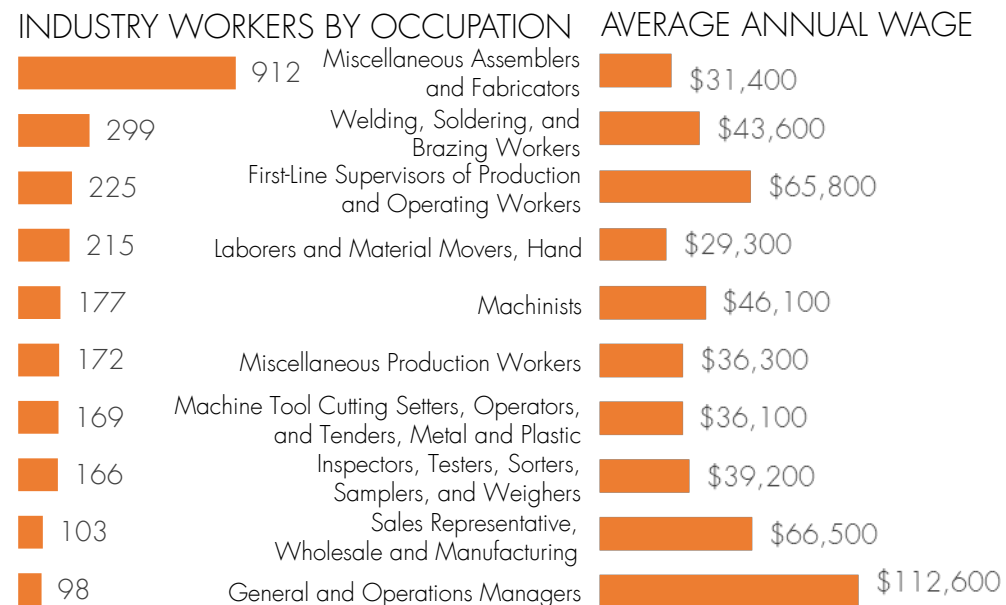
## REGIONAL WORKFORCE

The Transportation Manufacturing & Suppliers workforce is 960 workers in the Wilkes County Region and 4,945 workers in Region 7. The top three Transportation Manufacturing & Suppliers occupations in the Wilkes County Region are Miscellaneous Assemblers and Fabricators; Molders and Molding Machine Setters, Operators, and Tenders, Metal and Plastic; and Laborers and Material Movers. The top three Transportation Manufacturing & Suppliers occupations in Region 7 are Miscellaneous Assemblers and Fabricators; Welders, Soldering, and Brazing Workers; and First-Line Supervisors of Production and Operating Workers.

### WILKES COUNTY REGION, 2019



### REGION 7, 2019

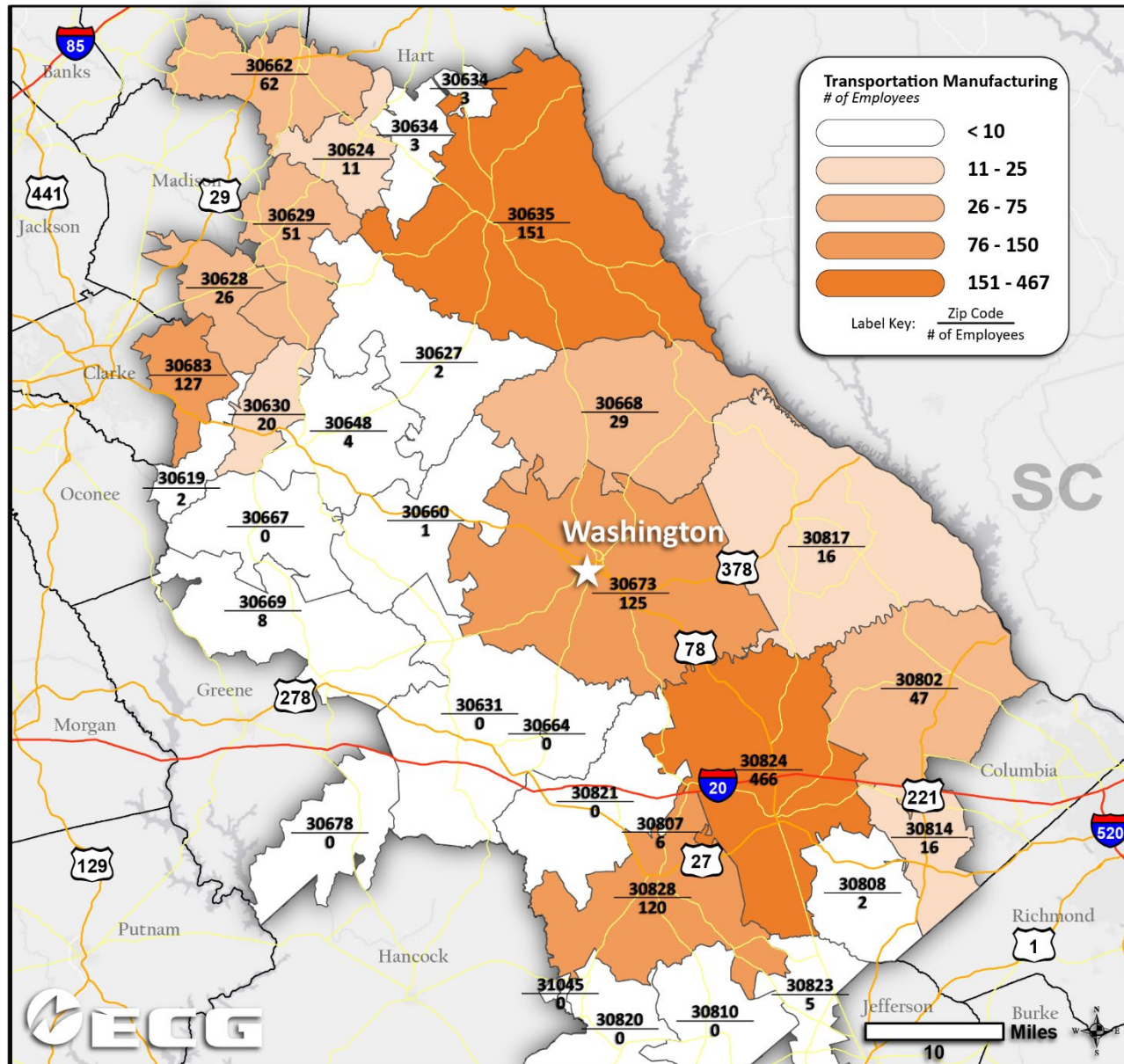


Source: ECG / JobsEQ

Note: The top 10 occupations in the Transportation Manufacturing Industry are displayed for each region.

# Transportation Manufacturing & Suppliers

WILKES COUNTY REGION TRANSPORTATION MANUFACTURING & SUPPLIERS INDUSTRY WORKFORCE BY ZIP CODE



Source: ECG / JobsEQ



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