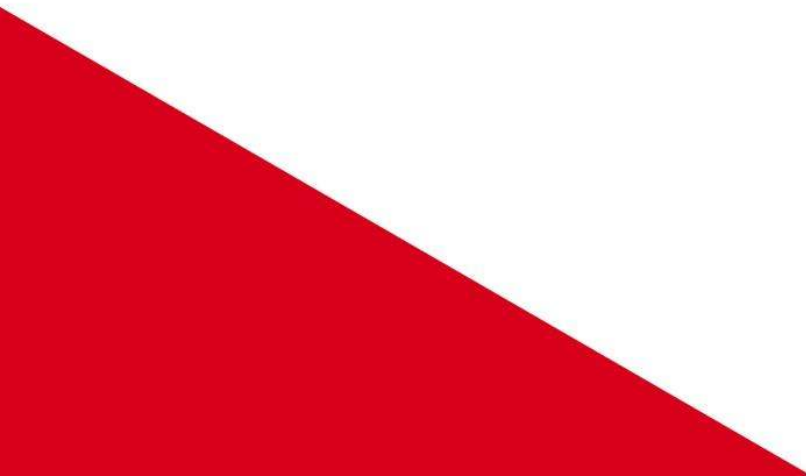


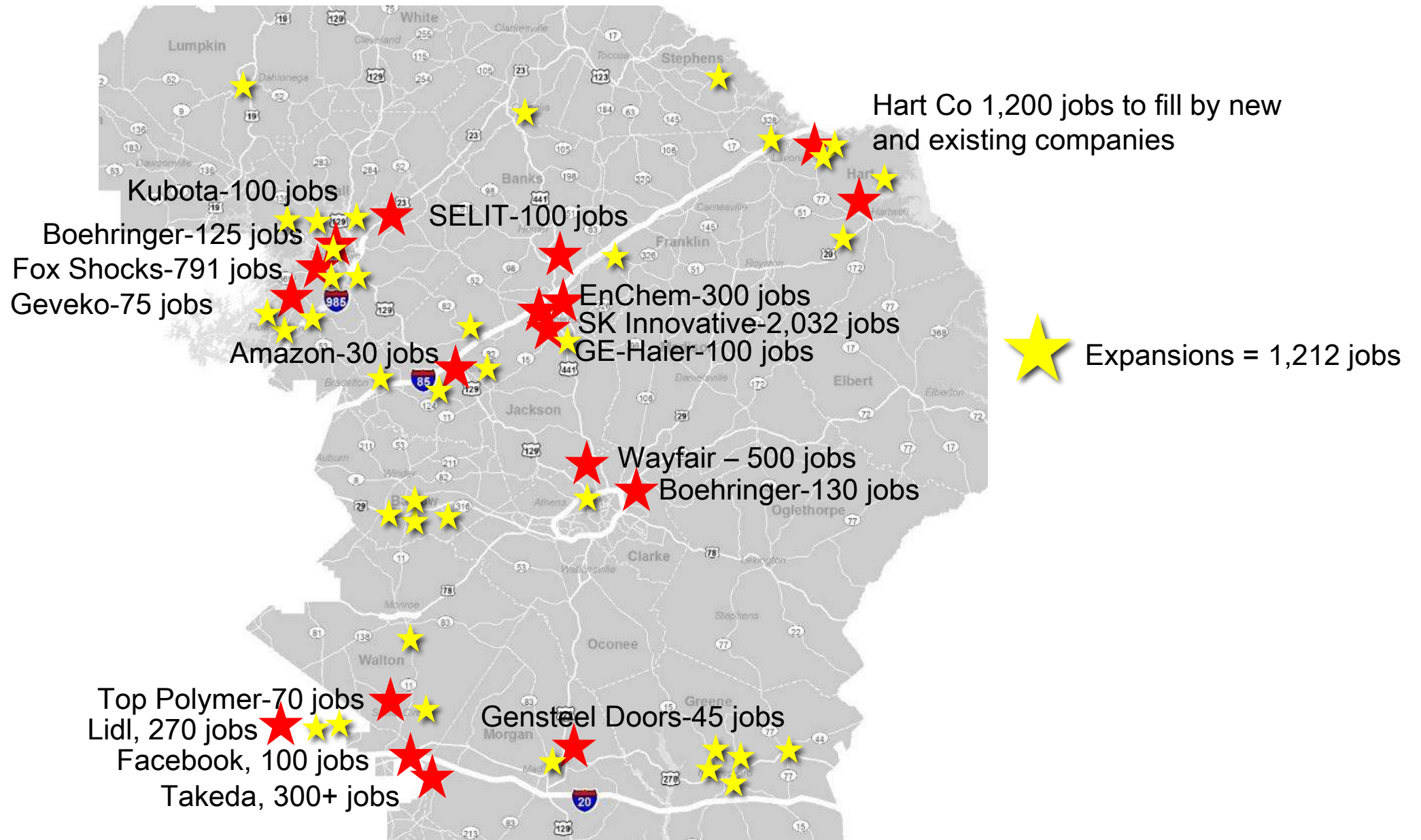


State of Madison County

April 16, 2020
Online Presentation



New & Expansion Announcements in 2018-19





Project Location Announcements, Region 5

January 2019 – January 2020 (sorted by jobs announced)

Source: Georgia Department of Economic Development, February 2020

Company	Type of Announcement	Jobs Announced	Industry	Location
Wayfair Incorporated	New Location	503	Customer Contact Center	Athens
EnChem Co Ltd	New Location	300	Battery electrolyte	Unincorporated
Lidl	New Location	270	Cold storage	Covington
Harrison Poultry (HQ)	Expansion	158	Poultry Processing	Winder
Boehringer Ingelheim-Animal Health	New Location	130	Animal Vaccine	Athens
Baker & Taylor	Expansion	115	Books, Video and Music	Commerce
Hitachi Automotive Systems Americas, Inc.	Expansion	100	Automotive Parts	Monroe
SKAPS Industries (Commerce)	Expansion	55	Geosynthetics/Fiberglass	Commerce
Leggett & Platt, Inc.	Expansion	35	Mattresses	Monroe
Flexo Converters USA, Inc.	Expansion	35	Bag Manufacturing	Monroe
General Mills Corporation (Covington)	Expansion	30	Consumer Food Products	Covington
ES Fibervisions (Covington)	Expansion	21	Synthetic Fibers	Covington
Aavis Pharmaceuticals	Expansion	15	Pharmaceuticals	Braselton
A2B Fulfillment	Expansion	0	Distribution	Greensboro
Novelis, Inc	Expansion	0	Aluminum Recycling	Greensboro
Novelis, Inc	Expansion	0	Aluminum Recycling	Greensboro
Diversified Plastics, Inc.	Expansion	0	Plastics Manufacturing	Greensboro
Bard Manufacturing	Expansion	0	HVAC Manufacturer	Madison
Novelis, Inc	Expansion	0	Aluminum Recycling	Greensboro

Source: Georgia Department of Economic Development, February 2020



Project Location Announcements, Region 2

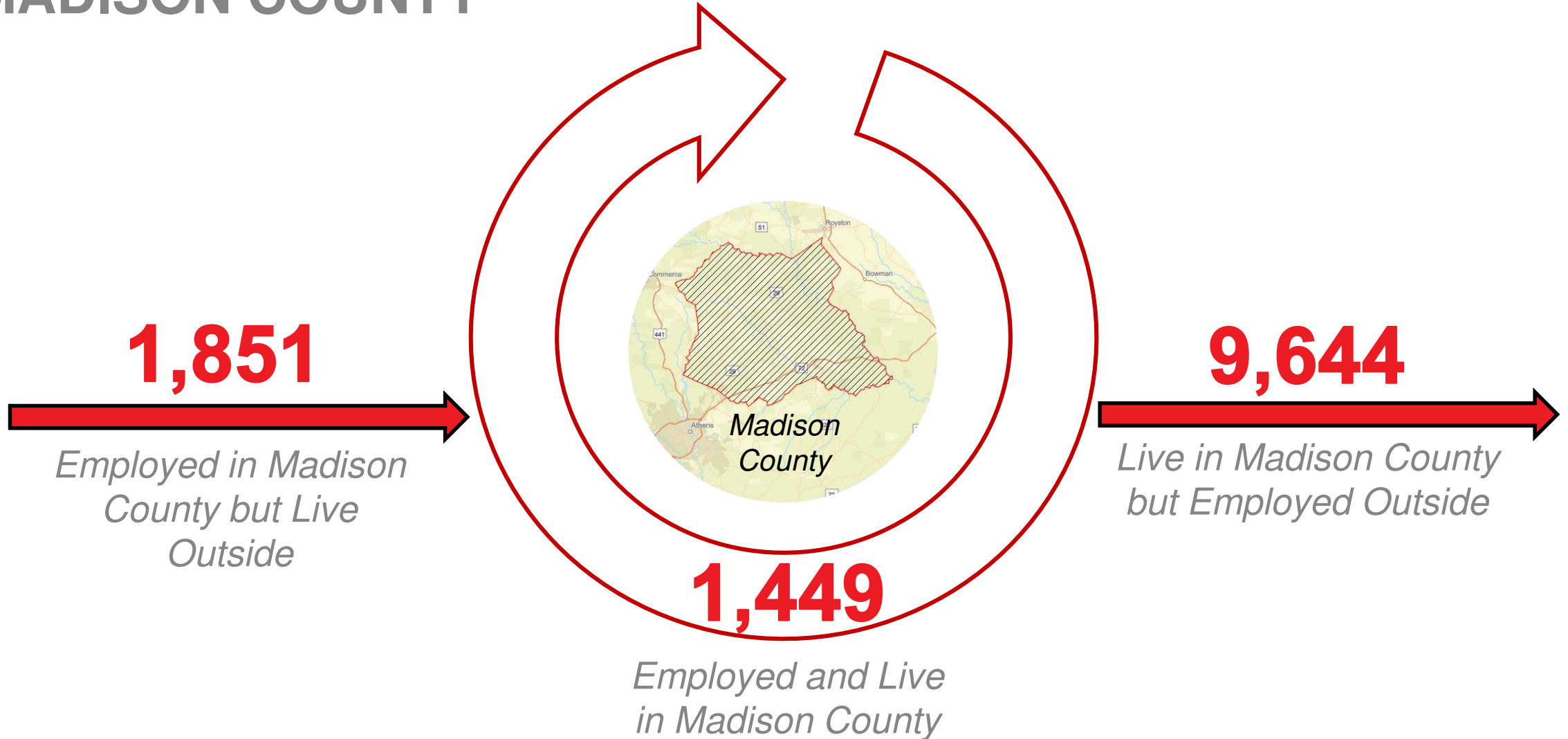
January 2019 – January 2020 (sorted by jobs announced)

Source: Georgia Department of Economic Development, February 2020

Company	Type of Announcement	Jobs		Location
		Announced	Industry	
Sports Warehouse	Expansion	200	Distribution Center	Alpharetta
Boehringer Ingelheim-Animal Health	New Location	125	Animal Vaccine	Gainesville
ElringKlinger USA Inc	Expansion	100	Metal Stamping	Buford
Mars Wrigley Confectionery	Expansion	83	Chewing Gum	Flowery Branch
Geveko	New Location	75	Temporary signage	Gainesville
Kubota Manufacturing of America Corp.	Expansion	67	Research and Development	Gainesville
Nifco KTW (Toccoa)	Expansion	50	Automotive Components	Toccoa
Carroll Daniel Construction	Expansion	50	General Contractor	Gainesville
Recro Pharma Gainesville	Expansion	30	Pharma Pill and Capsule Manufacturing	Gainesville
RAI Industrial Fabricators	Expansion	30	Steel Fabrication	Commerce
Kool Farm LLC	New Location	24	Poultry Cool Cells	Franklin Springs
Hellman-Chang Furniture	New Location	24	Furniture	Dawsonville
RefrigiWear	Expansion	20	Apparel	Dahlonega
Royston LLC	Expansion	20	Commercial Displays	Royston
Glazing Rubber Products, Inc.	Expansion	15	Rubber window glazing	Dawsonville
Blue Sky Refurbishing	Expansion	10	Garbage Truck Refurbishing	Gainesville
Dongil Rubber Belt	New Location	8	Rubber Belt for automobile	Dahlonega
Atlanta Gear Works, Inc.	Expansion	6	Process Critical Gear Box Production	Dawsonville
Georgia Powder Coating	Expansion	5	Powder Coating	Gainesville
AYC Plastics/American Yazaki Corporation	Expansion	5	Blow Mold Fuel Tanks	Gainesville
Hyflow Controls	New Location	5	Hydraulic Controls	Baldwin
Industrial Pipe	Expansion	2	Pipe Fabrication	Gainesville
Pharma Tech Industries	Expansion	0	Bioscience	Royston
Premier Surplus Inc.	Expansion	0	Electronic Equipment Recycling	Dawsonville
PolyPortables	Expansion	0	Portable Toilets	Dahlonega

INFLOW & OUTFLOW

MADISON COUNTY



WHERE WORKERS LIVE

MADISON COUNTY

Jobs Counts by Counties Where Workers Live

	Count	Share
All Counties	3,300	100.0%
Madison County, GA	1,449	43.9%
Clarke County, GA	405	12.3%
Oglethorpe County, GA	170	5.2%
Jackson County, GA	143	4.3%
Elbert County, GA	115	3.5%
Oconee County, GA	92	2.8%
Franklin County, GA	89	2.7%
Gwinnett County, GA	70	2.1%
Hart County, GA	58	1.8%
Barrow County, GA	55	1.7%
All Other Locations	654	19.8%

WHERE RESIDENTS WORK

MADISON COUNTY

54% of Madison Co residents work in Clarke, Madison & Jackson Co

Jobs Counts by Counties Where Workers are Employed

	Count	Share
All Counties	11,093	100.0%
Clarke County, GA	3,701	33.4%
Madison County, GA	1,449	13.1%
Jackson County, GA	834	7.5%
Fulton County, GA	617	5.6%
Gwinnett County, GA	556	5.0%
Oconee County, GA	471	4.2%
Hall County, GA	352	3.2%
Franklin County, GA	286	2.6%
DeKalb County, GA	243	2.2%
Cobb County, GA	233	2.1%
All Other Locations	2,351	21.2%

Madison County Top 20 Employers

Company	Address	City	Description	Employees
Comer Health & Rehabilitation	2430 Paoli St	Comer	Nursing Care Facilities	125
Ingles	9161 Highway 29 S	Hull	Grocery Stores	100
Engineering & Cycle Co. Inc.	4904 Highway 98 E	Comer	Industrial & Commercial Machinery & Equipment	42
MedLink Georgia Inc.	6754 Highway 72 W	Colbert	Doctors, Medical, Offices & Clinics	40
Southern Textiles & Laminating Inc.	40 Madico Industrial Dr	Comer	Coated Fabrics, Not Rubberized	40
Jackson EMC	85 Spratlin Mill Rd	Hull	Electric Services	34
Columbia Farms of Georgia Inc.	55 Cooper Rd	Comer	Poultry Slaughtering & Processing	31
Easter Seals Child Development Center	85 Rock Quarry Rd	Danielsville	Child Day Care Services	27
Superior Trailers of Georgia Inc.	3785 Highway 29 N	Danielsville	Truck Trailers	25
Weaver Distributors Inc.	4015 Danielsville Rd	Athens	Motor Vehicle Supplies & New Parts	25
MedLink Georgia Inc.	11 Charlie Morris Rd	Colbert	Doctors, Medical, Offices & Clinics	23
CVS Pharmacy	8895 Highway 29 S	Hull	Drug Stores & Proprietary Stores	22
Hardee's	350 General Daniel Ave N	Danielsville	Restaurant	22
Iron Man Mize LLC	226 E Jones Chapel Rd	Danielsville	Fabricated Structural Metal	22
Williams Gas Pipeline/Transco	117 Winns Lake Rd	Comer	Natural Gas Transmission	19
SamsCo Heating & Air	50 Industrial Way	Comer	Plumbing, Heating & Air Conditioning	17
Marketplace	291 Sam Groves St	Danielsville	Grocery Stores	15
Miracle Years of Learning	223 Colbert School Rd	Colbert	Child Day Care Services	14
Entourage Clothing & Gifts	185 Madico Dr	Comer	Women's Clothing Stores	12
Georgia Metals Inc.	539 General Daniel Ave N	Danielsville	Sheet Metal Work	12

Largest Occupations – 45 min drive from Danielsville

Description	2019 Jobs	2024 Jobs	2019 - 2024 Change	2019 - 2024 % Change
Retail Sales Workers	11,140	12,013	873	8%
Food and Beverage Serving Workers	10,295	11,312	1,017	10%
Material Moving Workers	8,864	10,299	1,435	16%
Preschool, Primary, Secondary, and Special Education School Teachers	6,819	7,096	277	4%
Information and Record Clerks	6,077	6,678	601	10%
Material Recording, Scheduling, Dispatching, and Distributing Workers	5,583	6,126	543	10%
Health Diagnosing and Treating Practitioners	4,979	5,541	562	11%
Motor Vehicle Operators	4,704	5,124	420	9%
Other Production Occupations	4,676	4,971	295	6%
Cooks and Food Preparation Workers	4,293	4,590	297	7%
Other Office and Administrative Support Workers	3,986	4,285	299	8%
Construction Trades Workers	3,942	4,380	438	11%
Business Operations Specialists	3,911	4,332	421	11%
Other Installation, Maintenance, and Repair Occupations	3,906	4,324	418	11%
Secretaries and Administrative Assistants	3,850	4,050	200	5%
Assemblers and Fabricators	3,708	3,807	99	3%
Health Technologists and Technicians	3,544	3,919	375	11%

Regional Strengths | Industry Clusters in 2020

Region's Cluster Rankings:

- Region defined as Madison, Athens-Clarke & Jackson counties in Georgia
- Highest ranked cluster is **Distribution & Electronic Commerce** with a score of 67 (out of 100) points.
- Average cluster is 42 (out of 100) points. This is not a benchmark against other regions; it only compares the relative performance of clusters to each other. Clusters ranked higher than 42 are above average for the region, while clusters ranked lower than 42 are below average.
- Top clusters must have a score of at least 53, while bottom clusters must have a score of 30 or less. These thresholds are determined by applying the average deviation (plus or minus 12) to the average cluster score of 42.
- Criteria for ranking clusters: earnings and growth very important, regional competitiveness, regional specialization and GRP important. Many of these will be rearranged when the economy restarts but distribution will remain a major cluster to support supply chain.

Regional Strengths | Harvard Industry Clusters in 2020

Questions to consider:

- How diverse are the region's industry clusters?
- What are the contributions of our largest industry clusters – employment, exports, GRP?
- What skill sets are critical for the continued success of our industry clusters?
- What skill sets overlap between industry clusters?
- How easy is it for industries to hire the right workers?
- How is our region supporting our largest industry clusters? What more can we do?

Madison County Region Industry Clusters

 Distribution and Electronic Commerce	67
 Recreational and Small Electric Goods	56
 Textile Manufacturing	55
 Local Financial Services	53
 Local Commercial Services	51
 State Government Services	51
 Biopharmaceuticals	50
 Wood Products	48
 Automotive	45
 Education and Knowledge Creation	44
 Production Technology and Heavy Machinery	44
 Food Processing and Manufacturing	43

You have 26 industries in this cluster:

NAICS	Industry	Jobs	Score
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	13	17
423440	Other Commercial Equipment Merchant Wholesalers	21	21
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	27	64
423510	Metal Service Centers and Other Metal Merchant Wholesalers	44	39
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	31	21
423690	Other Electronic Parts and Equipment Merchant Wholesalers	18	28
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	43	31
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	107	27
423830	Industrial Machinery and Equipment Merchant Wholesalers	70	24
423850	Service Establishment Equipment and Supplies Merchant Wholesalers	76	16
424130	Industrial and Personal Service Paper Merchant Wholesalers	23	21
424210	Drugs and Druggists' Sundries Merchant Wholesalers	220	30
424330	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers	511	43
424690	Other Chemical and Allied Products Merchant Wholesalers	91	22

424710	Petroleum Bulk Stations and Terminals	10	24
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	27	19
424920	Book, Periodical, and Newspaper Merchant Wholesalers	471	42
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	278	34
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	13	16
425110	Business to Business Electronic Markets	16	17
425120	Wholesale Trade Agents and Brokers	231	29
454110	Electronic Shopping and Mail-Order Houses	130	21
493110	General Warehousing and Storage	2,740	100
493120	Refrigerated Warehousing and Storage	51	21
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	21	22
561910	Packaging and Labeling Services	50	18

Recreational & Small Electric Goods

56

You have 2 industries in this cluster:

NAICS	Industry	Jobs	Score
337920	Blind and Shade Manufacturing	107	61
339999	All Other Miscellaneous Manufacturing	12	17

Textile Manufacturing

55

You have 3 industries in this cluster:

NAICS	Industry	Jobs	Score
313110	Fiber, Yarn, and Thread Mills	56	21
313230	Nonwoven Fabric Mills	300	69
325220	Artificial and Synthetic Fibers and Filaments Manufacturing	175	41

You have 5 industries in this cluster:

NAICS	Industry	Jobs	Score
522110	Commercial Banking	441	22
522130	Credit Unions	28	22
524210	Insurance Agencies and Brokerages	2,143	63
541213	Tax Preparation Services	28	13
561440	Collection Agencies	107	17

You have 17 industries in this cluster:

NAICS	Industry	Jobs	Score
453210	Office Supplies and Stationery Stores	79	18
541110	Offices of Lawyers	377	32
541211	Offices of Certified Public Accountants	135	25
541219	Other Accounting Services	88	19
541350	Building Inspection Services	17	20
541620	Environmental Consulting Services	22	29
561110	Office Administrative Services	120	32
561320	Temporary Help Services	3,445	64
561431	Private Mail Centers	36	17
561439	Other Business Service Centers (including Copy Shops)	15	20
561612	Security Guards and Patrol Services	151	13
561621	Security Systems Services (except Locksmiths)	13	19
561710	Exterminating and Pest Control Services	198	23
561720	Janitorial Services	160	14
561990	All Other Support Services	12	23
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	70	23
812320	Drycleaning and Laundry Services (except Coin-Operated)	85	14

State Government Services

51

You have 1 industry in this cluster:

NAICS	Industry	Jobs	Score
902999	State Government, Excluding Education and Hospitals	2,511	51

Biopharmaceuticals

50

You have 2 industries in this cluster:

NAICS	Industry	Jobs	Score
325411	Medicinal and Botanical Manufacturing	206	45
325412	Pharmaceutical Preparation Manufacturing	624	52

Wood Products

48

You have 2 industries in this cluster:

NAICS	Industry	Jobs	Score
321214	Truss Manufacturing	242	46
321219	Reconstituted Wood Product Manufacturing	112	51

Automotive

45

You have 2 industries in this cluster:

NAICS	Industry	Jobs	Score
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	267	29
336390	Other Motor Vehicle Parts Manufacturing	1,134	49

You have 6 industries in this cluster:

NAICS	Industry	Jobs	Score
541714	Research and Development in Biotechnology (except Nanobiotechnology)	53	21
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	56	23
611430	Professional and Management Development Training	44	36
611691	Exam Preparation and Tutoring	15	11
611710	Educational Support Services	20	34
902612	Colleges, Universities, and Professional Schools (State Government)	17,759	44

You have 8 industries in this cluster:

NAICS	Industry	Jobs	Score
332911	Industrial Valve Manufacturing	55	38
332991	Ball and Roller Bearing Manufacturing	200	38
333120	Construction Machinery Manufacturing	812	56
333241	Food Product Machinery Manufacturing	23	27
333318	Other Commercial and Service Industry Machinery Manufacturing	18	27
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	233	21
333914	Measuring, Dispensing, and Other Pumping Equipment Manufacturing	169	41
333993	Packaging Machinery Manufacturing	116	27

You have 3 industries in this cluster:

NAICS	Industry	Jobs	Score
311119	Other Animal Food Manufacturing	70	25
311830	Tortilla Manufacturing	373	48
311942	Spice and Extract Manufacturing	171	42

But this was all before we had heard of COVID-19.

Conclusions

- As we move into a different work environment, the three-county region is fortunate to have a diverse industry mix.
- Workforce initiatives must take into account the economic contributions of industries and small businesses and the capacities for those industries to employ workers at all skill levels.
- The region's primary focus is to help communities reestablish their small businesses in a safe & healthy manner.
- Existing programs at UGA, Athens Tech and Lanier Tech continue to supply the pipeline of talent for regional employers for the new workplace.
- Coordination with regional employers will guarantee additional educational programs that are suited to the needs industry through online education & training.

