



Target Industry Cluster Analysis

Kerr-Tar Regional Economic Development, North Carolina

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01 overview

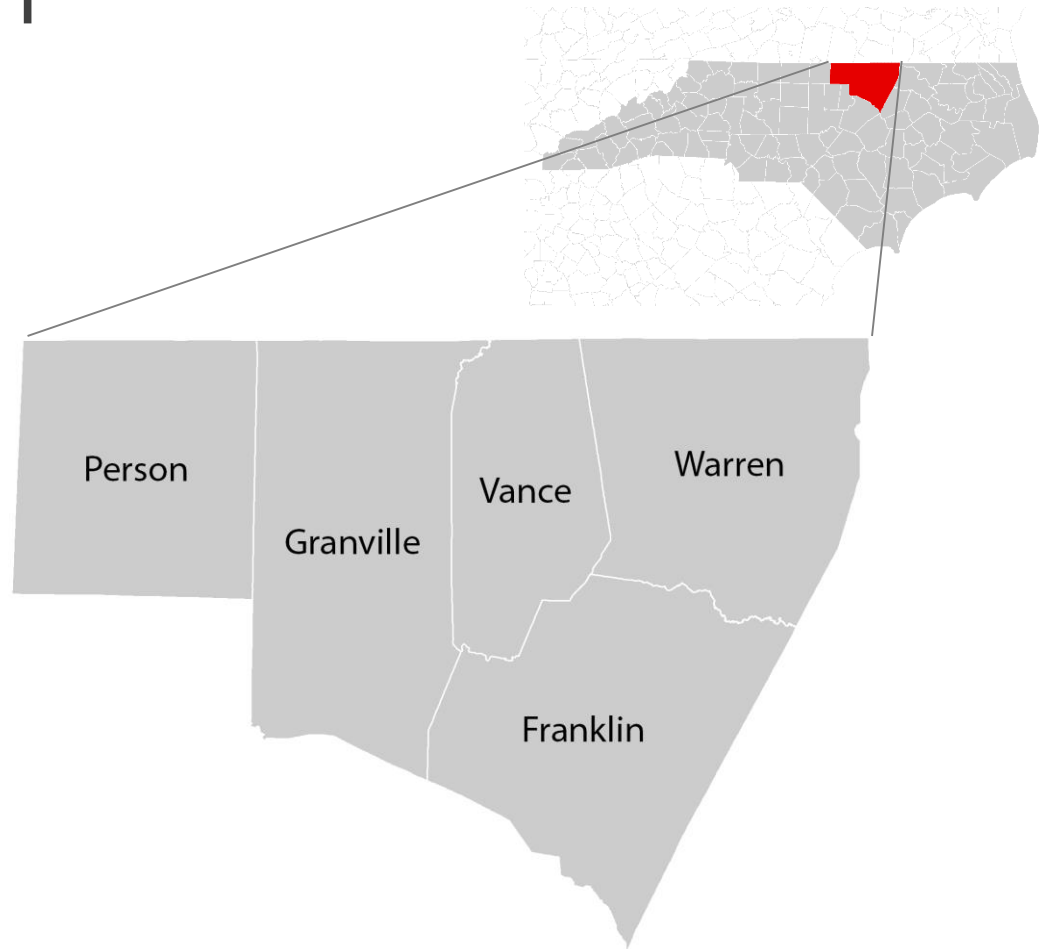
Kerr-Tar Region, NC

Overview

Kerr-Tar Region

The Kerr-Tar Region is comprised of three North Carolina counties. Interstate I-85 passes through the central part of the region connecting to I-40 to the south.

- Franklin
- Granville
- Person
- Vance
- Warren



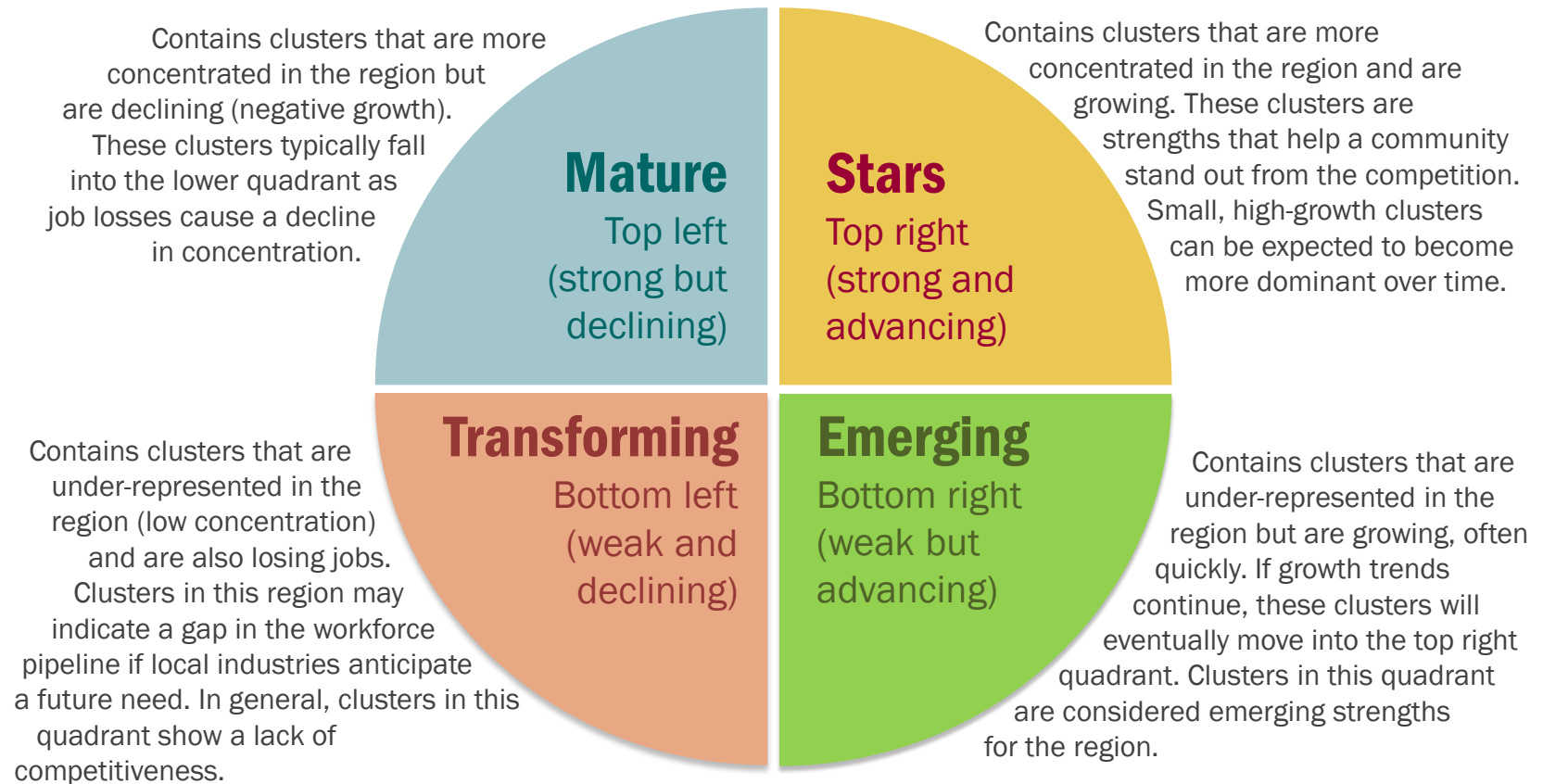
02 industry cluster analysis

Kerr-Tar Region, NC

Industry cluster analysis

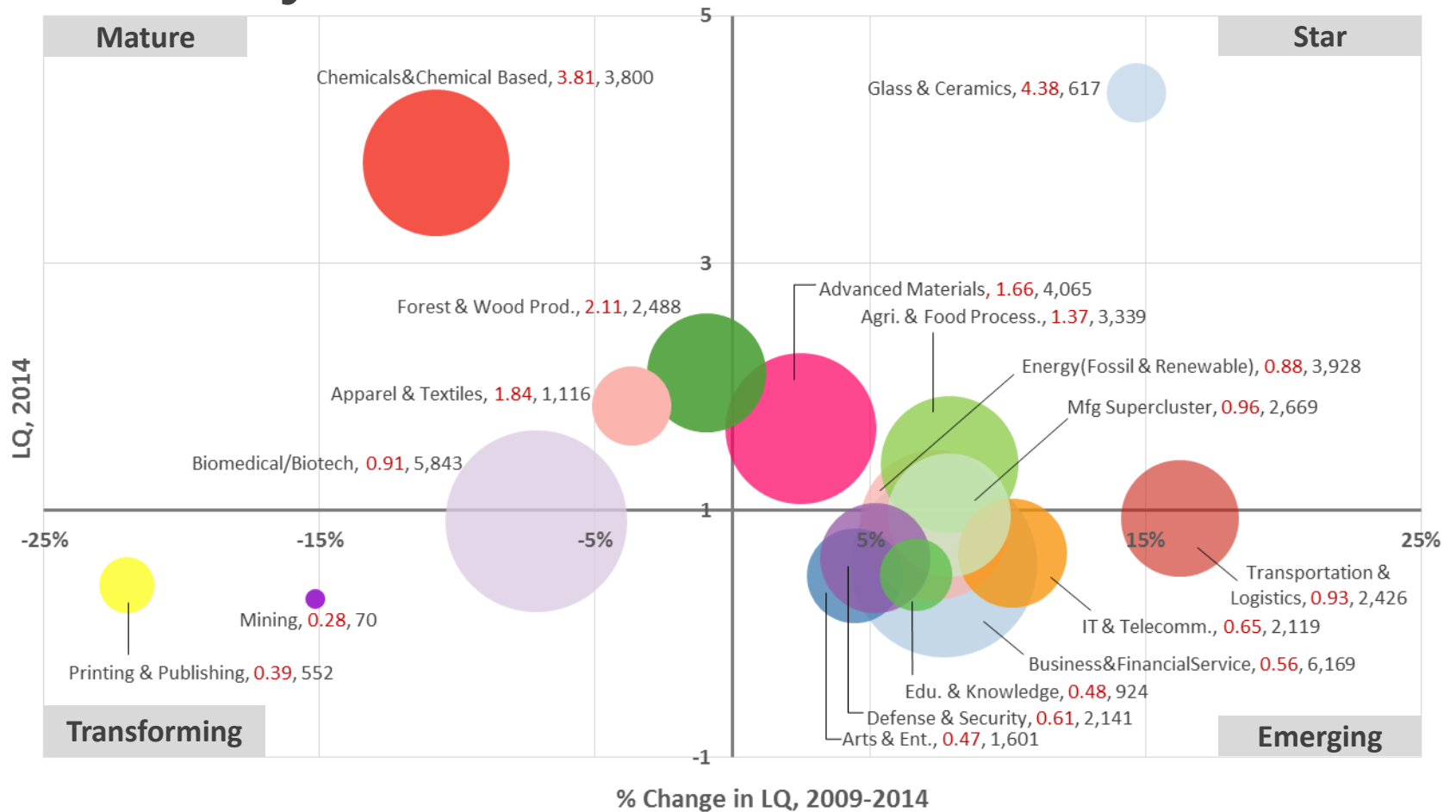
How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



Industry and occupation

Industry cluster bubble chart



Note: Mining cluster has too few jobs

section 02

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Note: Label includes cluster name, LQ 2014, and Employment 2014; NAICS 2012 definitions

Industry and occupation

Manufacturing sub-cluster bubble chart



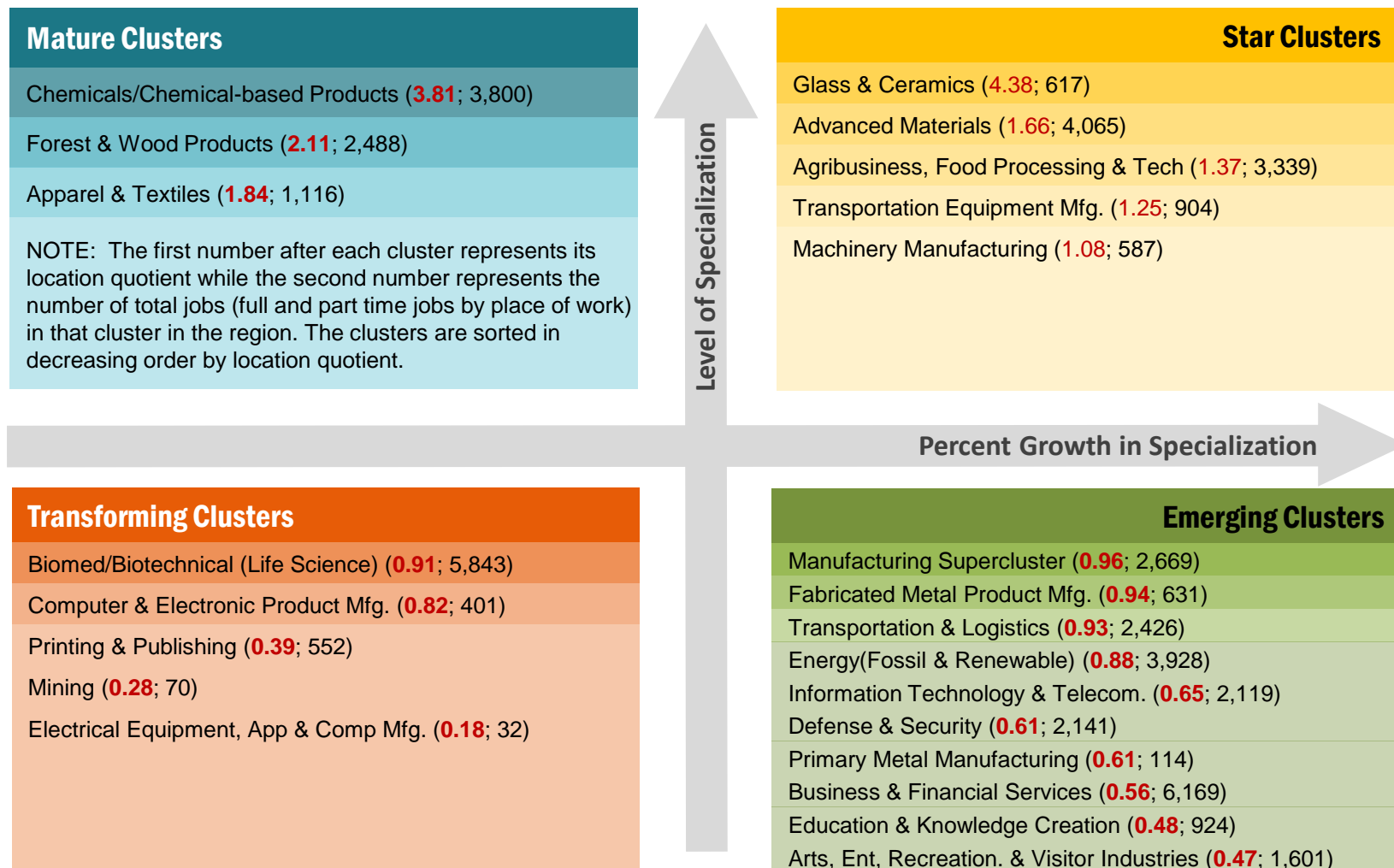
Note: Electrical Equipment, Appliance & Component Manufacturing cluster has too few jobs

section 02

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Note: Label includes cluster name, LQ 2014, and Employment 2014; NAICS 2012 definition

Industry cluster analysis



Note: Electrical Equipment, Appliance & Component Manufacturing and Mining clusters have too few jobs

section 02

Industry and occupation

Bubble chart interpretation

Mature Industries

Three industry clusters in the Kerr-Tar Region are in the Maturing stage: Chemicals/Chemical-based Products, Forest & Wood Products, and Apparel & Textiles. These industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the Kerr-Tar Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Kerr-Tar Region, Biomed/Biotechnical (Life Science), Computer & Electronic Product Mfg., Printing & Publishing, Mining, and Electrical Equipment, App & Comp Manufacturing, are all Transforming clusters. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The most highly concentrated of the Star industry clusters in the Kerr-Tar Region is Glass & Ceramics. Its location quotient is 4.38, indicating that the cluster is 4 times more concentrated in the region compared to the U.S. The other strong clusters in the region are Advanced Materials, Agribusiness, Food Processing & Technology, Transportation Equipment Manufacturing, and Machinery Manufacturing.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are ten Emerging clusters in the Kerr-Tar Region. Top three that have the highest LQ are Manufacturing Supercluster, Fabricated Metal Product Manufacturing, and Transportation & Logistics.

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target
industry
cluster

**Agribusiness, Food
Processing and Technology**

Advanced Materials

Manufacturing Supercluster

Shift-Share Analysis by Top Industry Sectors: Kerr-Tar Region, NC

Agribusiness, Food Processing and Technology Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Crop Production	1,652	145	-130	15	-255	-270
Animal Production	524	25	-31	-6	200	↑ 206
Farm Labor Contractors and Crew Leaders	244	16	14	30	30	0
Dog and Cat Food Manufacturing	168	11	4	15	18	↑ 3
Tobacco Manufacturing	162	0	0	0	162	↑ 162
Farm Supplies Merchant Wholesalers	138	8	0	8	35	↑ 27
Other Farm Product Raw Material Merchant Wholesalers	122	9	1	10	7	-3
Farm and Garden Machinery and Equipment Merchant Wholesalers	50	7	0	7	-45	-52
Rendering and Meat Byproduct Processing	45	0	0	0	45	↑ 45
Roasted Nuts and Peanut Butter Manufacturing	38	0	0	0	33	↑ 33
Flour Milling	33	3	-2	1	-2	-3
Soil Preparation, Planting, and Cultivating	26	1	2	3	9	↑ 6
Wineries	21	0	0	0	19	↑ 19
Farm Machinery and Equipment Manufacturing	18	0	0	0	14	↑ 14
Farm Management Services	16	1	1	2	8	↑ 6

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Agribusiness, Food Processing and Technology Cluster

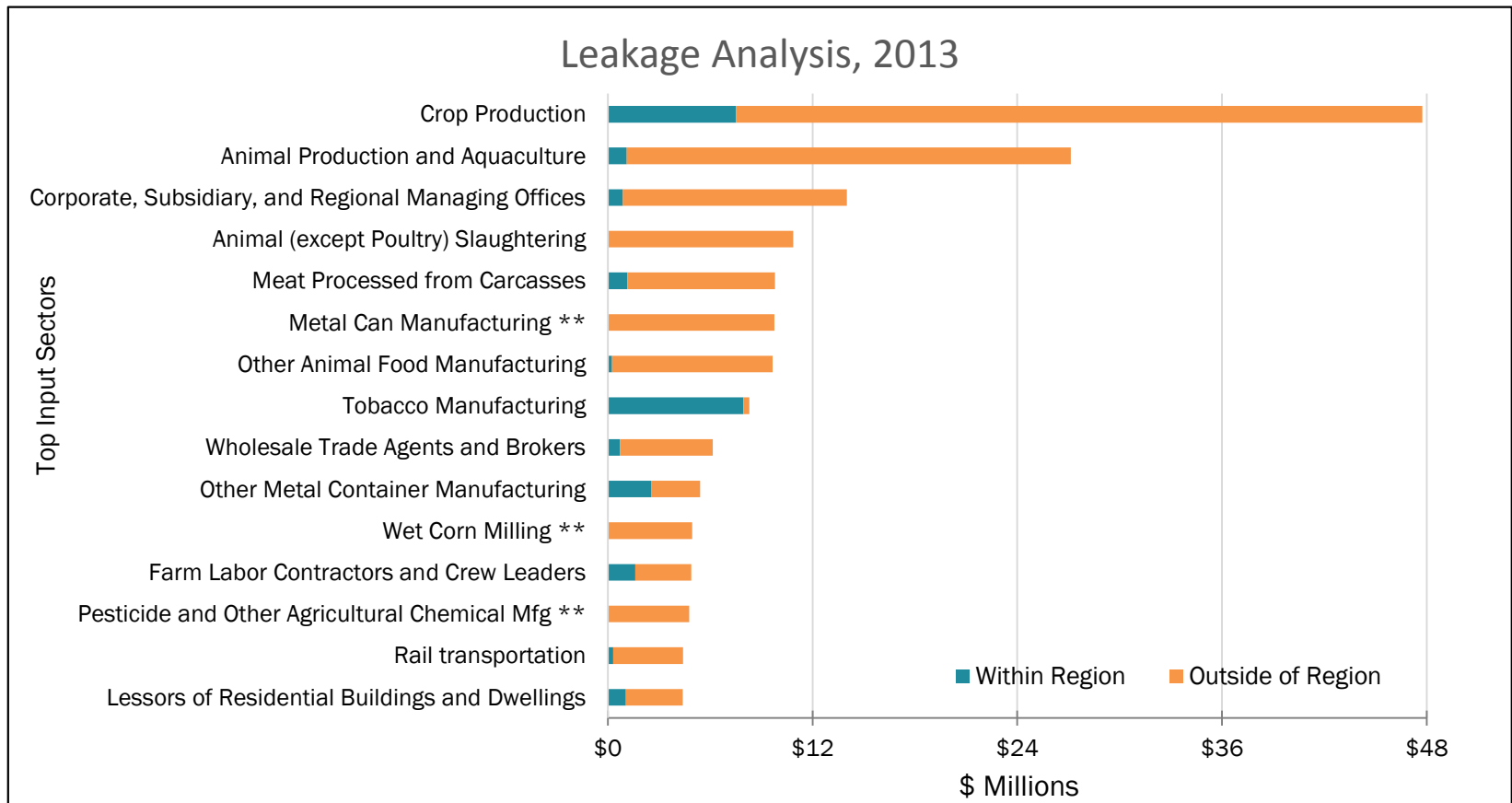
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Crop Production	\$47.74	16%	84%
Animal Production and Aquaculture	\$27.13	4%	96%
Corporate, Subsidiary, and Regional Managing Offices	\$14.01	6%	94%
Animal (except Poultry) Slaughtering *	\$10.87	0%	100%
Meat Processed from Carcasses	\$9.80	12%	88%
Metal Can Manufacturing **	\$9.76	0%	100%
Other Animal Food Manufacturing *	\$9.67	3%	97%
Tobacco Manufacturing	\$8.30	96%	4%
Wholesale Trade Agents and Brokers	\$6.15	12%	88%
Other Metal Container Manufacturing	\$5.42	47%	53%
Wet Corn Milling **	\$4.95	0%	100%
Farm Labor Contractors and Crew Leaders	\$4.89	33%	67%
Pesticide and Other Agricultural Chemical Manufacturing **	\$4.78	0%	100%
Rail transportation	\$4.41	7%	93%
Lessors of Residential Buildings and Dwellings	\$4.40	24%	76%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Agribusiness, Food Processing and Technology Cluster



Note: ** industry sector is not present in the region

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Top Occupations: Kerr-Tar Region, NC

Agribusiness, Food Processing and Technology Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	1,592	-6%	\$10.9	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	459	12%	\$9.2	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	67	22%	\$10.9	Less than high school
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	57	0%	\$22.2	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	52	16%	\$16.3	Postsecondary non-degree award
Packaging and Filling Machine Operators and Tenders	47	57%	\$13.7	High school diploma or equivalent
Agricultural Equipment Operators	46	21%	\$8.9	Less than high school
Industrial Truck and Tractor Operators	37	54%	\$12.1	Less than high school
Farmworkers, Farm, Ranch, and Aquacultural Animals	36	9%	\$15.8	Less than high school
Bookkeeping, Accounting, and Auditing Clerks	34	-3%	\$14.9	High school diploma or equivalent
Mixing and Blending Machine Setters, Operators, and Tenders	33	32%	\$12.7	High school diploma or equivalent
Packers and Packagers, Hand	32	28%	\$10.5	Less than high school
Slaughterers and Meat Packers	28	-33%	\$12.5	Less than high school
General and Operations Managers	28	27%	\$46.3	Bachelor's degree
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	27	93%	\$23.4	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Shift-Share Analysis by Top Industry Sectors: Kerr-Tar Region, NC

Advanced Materials Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Toilet Preparation Manufacturing	1,485	130	104	234	-225	-459
All Other Basic Organic Chemical Mfg	419	32	8	40	-7	-47
Sheet Metal Work Manufacturing	185	1	0	1	178	↑ 177
Surgical and Medical Instrument Mfg	184	18	-13	5	-54	-59
Pottery, Ceramics, and Plumbing Fixture Manufacturing	180	6	8	14	107	↑ 93
Bare Printed Circuit Board Manufacturing	166	3	-13	-10	120	↑ 130
Other Motor Vehicle Parts Manufacturing	146	16	45	61	-60	-121
Plate Work Manufacturing	140	3	1	4	104	↑ 100
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	133	0	0	0	133	↑ 133
All Other Miscellaneous Fabricated Metal Product Manufacturing	113	1	0	1	104	↑ 103
Polystyrene Foam Product Manufacturing	90	3	-1	2	45	↑ 43
Other Commercial and Service Industry Machinery Manufacturing	85	0	0	0	85	↑ 85
Surgical Appliance and Supplies Mfg	77	17	-16	1	-151	-152
Machine Shops	73	4	8	12	19	↑ 7
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	70	2	-1	1	42	↑ 41

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Advanced Materials Cluster

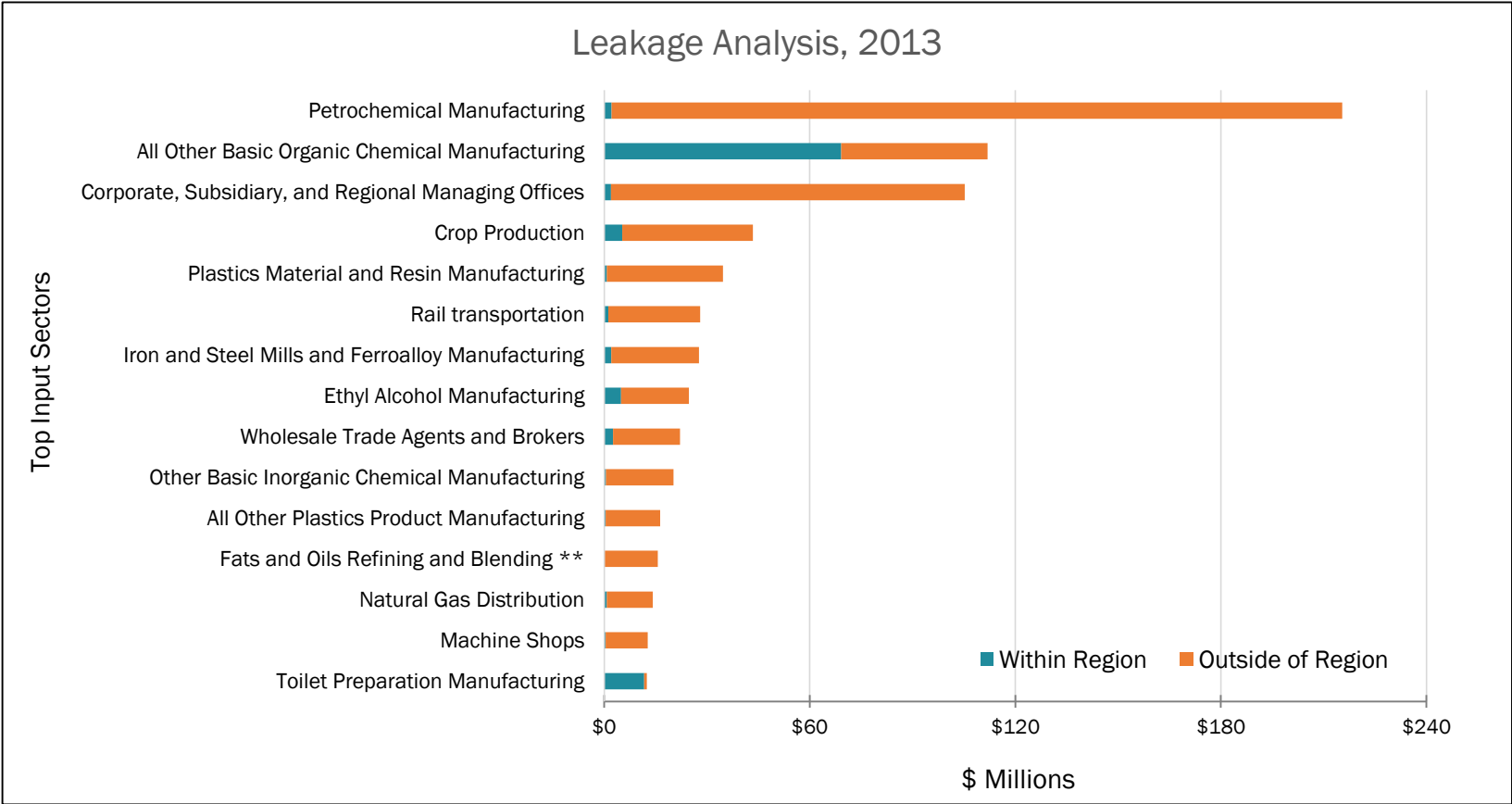
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Petrochemical Manufacturing *	\$215.40	1%	99%
All Other Basic Organic Chemical Manufacturing	\$111.91	62%	38%
Corporate, Subsidiary, and Regional Managing Offices	\$105.27	2%	98%
Crop Production	\$43.43	12%	88%
Plastics Material and Resin Manufacturing	\$34.63	2%	98%
Rail transportation	\$28.01	4%	96%
Iron and Steel Mills and Ferroalloy Manufacturing	\$27.69	8%	92%
Ethyl Alcohol Manufacturing	\$24.71	20%	80%
Wholesale Trade Agents and Brokers	\$22.14	12%	88%
Other Basic Inorganic Chemical Manufacturing	\$20.22	3%	97%
All Other Plastics Product Manufacturing	\$16.32	2%	98%
Fats and Oils Refining and Blending **	\$15.68	0%	100%
Natural Gas Distribution	\$14.14	6%	94%
Machine Shops	\$12.68	3%	97%
Toilet Preparation Manufacturing	\$12.40	94%	6%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Advanced Materials Cluster



Note: ** industry sector is not present in the region

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Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

Top Occupations: Kerr-Tar Region, NC

Advanced Materials Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Team Assemblers	214	0%	\$12.0	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	213	-12%	\$13.7	High school diploma or equivalent
Mixing and Blending Machine Setters, Operators, and Tenders	200	-6%	\$12.7	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	165	9%	\$24.0	Postsecondary non-degree award
Helpers--Production Workers	140	14%	\$10.7	Less than high school
Inspectors, Testers, Sorters, Samplers, and Weighers	134	-3%	\$15.7	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	112	8%	\$10.9	Less than high school
Maintenance and Repair Workers, General	97	8%	\$17.2	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	84	17%	\$22.2	High school diploma or equivalent
Shipping, Receiving, and Traffic Clerks	82	0%	\$13.6	High school diploma or equivalent
Machinists	81	21%	\$16.8	High school diploma or equivalent
Industrial Truck and Tractor Operators	80	5%	\$12.1	Less than high school
Chemical Equipment Operators and Tenders	79	-2%	\$22.2	High school diploma or equivalent
Packers and Packagers, Hand	77	0%	\$10.5	Less than high school
Industrial Machinery Mechanics	73	11%	\$20.2	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Shift-Share Analysis by Top Industry Sectors: Kerr-Tar Region, NC

Manufacturing Supercluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Motor Vehicle Transmission and Power Train Parts Manufacturing	541	31	128	159	137	-22
Construction Machinery Manufacturing	341	21	14	35	61	↑ 26
Sheet Metal Work Manufacturing	185	1	0	1	178	↑ 177
Analytical Laboratory Instrument Mfg	182	12	-2	10	27	↑ 17
Bare Printed Circuit Board Manufacturing	166	3	-13	-10	120	↑ 130
Motor Vehicle Metal Stamping	157	2	7	9	137	↑ 128
Other Motor Vehicle Parts Manufacturing	146	16	45	61	-60	-121
Plate Work Manufacturing	140	3	1	4	104	↑ 100
All Other Miscellaneous Fabricated Metal Product Manufacturing	113	1	0	1	104	↑ 103
Industrial and Commercial Fan and Blower and Air Purification Equipment Mfg	105	15	13	28	-99	-127
Other Commercial and Service Industry Machinery Manufacturing	85	0	0	0	85	↑ 85
Machine Shops	73	4	8	12	19	↑ 7
Other Metal Container Manufacturing	72	2	-2	0	44	↑ 44
Aluminum Sheet, Plate, and Foil Mfg	57	0	0	0	57	↑ 57
Iron and Steel Mills and Ferroalloy Mfg	57	0	0	0	54	↑ 54

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Manufacturing Supercluster

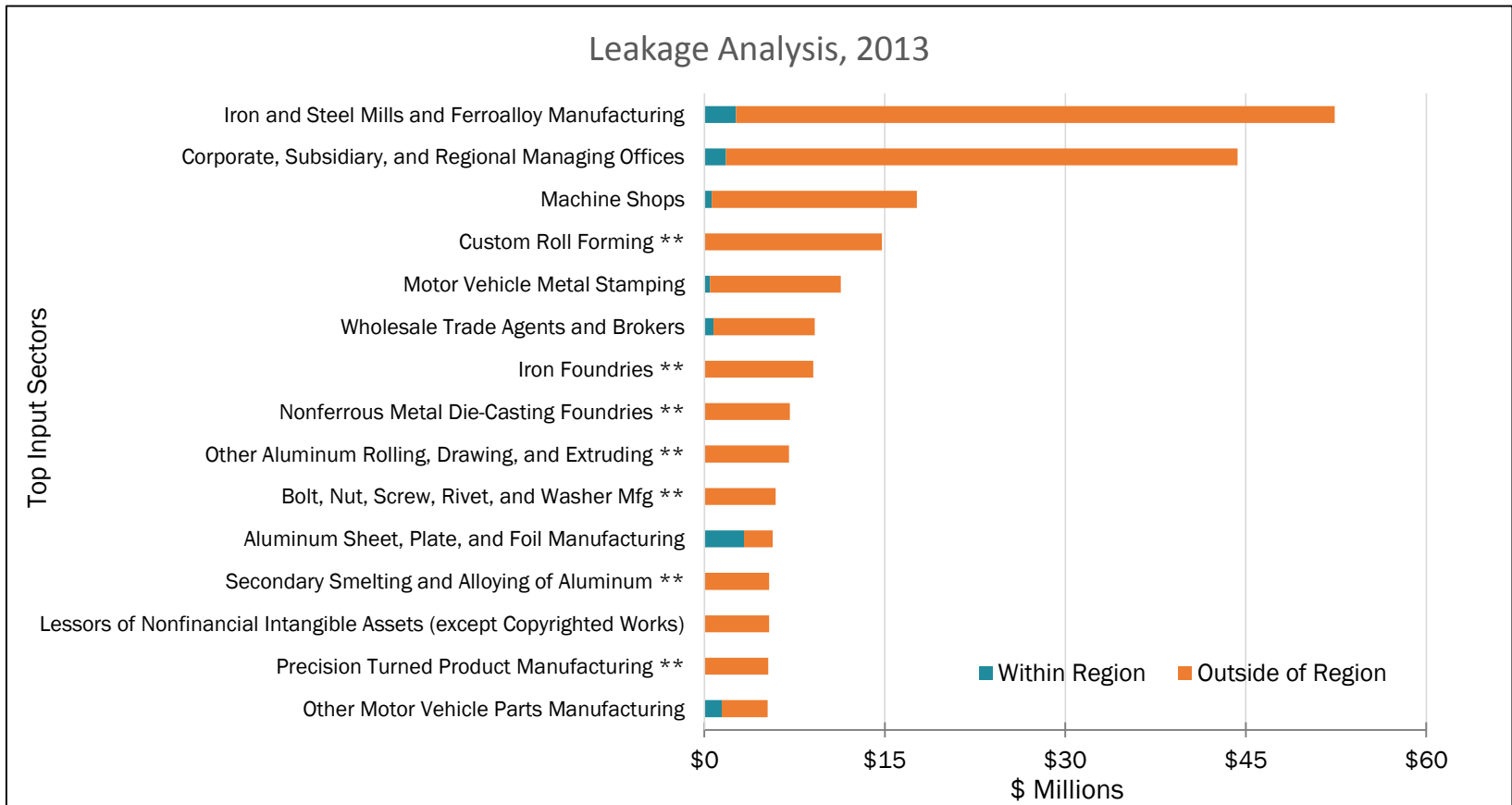
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Iron and Steel Mills and Ferroalloy Manufacturing	\$52.39	5%	95%
Corporate, Subsidiary, and Regional Managing Offices	\$44.31	4%	96%
Machine Shops	\$17.68	3%	97%
Custom Roll Forming **	\$14.76	0%	100%
Motor Vehicle Metal Stamping	\$11.34	4%	96%
Wholesale Trade Agents and Brokers	\$9.16	8%	92%
Iron Foundries **	\$9.05	0%	100%
Nonferrous Metal Die-Casting Foundries **	\$7.10	0%	100%
Other Aluminum Rolling, Drawing, and Extruding **	\$7.04	0%	100%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing **	\$5.93	0%	100%
Aluminum Sheet, Plate, and Foil Manufacturing	\$5.67	58%	42%
Secondary Smelting and Alloying of Aluminum **	\$5.40	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) *	\$5.38	0%	100%
Precision Turned Product Manufacturing **	\$5.31	0%	100%
Other Motor Vehicle Parts Manufacturing	\$5.26	28%	72%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars: Kerr-Tar Region, NC

Manufacturing Supercluster



Note: ** industry sector is not present in the region .

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Top Occupations: Kerr-Tar Region, NC

Manufacturing Supercluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Team Assemblers	309	14%	\$12.0	High school diploma or equivalent
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	113	9%	\$10.1	High school diploma or equivalent
Machinists	108	30%	\$16.8	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	99	16%	\$24.0	Postsecondary non-degree award
Inspectors, Testers, Sorters, Samplers, and Weighers	95	9%	\$15.7	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	77	8%	\$15.0	High school diploma or equivalent
Electrical and Electronic Equipment Assemblers	69	-26%	\$12.2	High school diploma or equivalent
Helpers--Production Workers	66	22%	\$10.7	Less than high school
Computer-Controlled Machine Tool Operators, Metal and Plastic	61	27%	\$16.1	High school diploma or equivalent
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	56	44%	\$15.6	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	55	25%	\$10.9	Less than high school
Industrial Engineers	53	4%	\$35.1	Bachelor's degree
Shipping, Receiving, and Traffic Clerks	49	17%	\$13.6	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	47	24%	\$22.2	High school diploma or equivalent
Maintenance and Repair Workers, General	45	25%	\$17.2	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Report Contributors

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