

INVESTING IN MANUFACTURING COMMUNITIES PARTNERSHIP (IMCP)

NORTHWEST GEORGIA REGION
Key Technology and Supply Chain Analysis

IMCP Summit
October 30, 2014



Image: www.mmn.com



Image: Shaw Industries



Image: Kathy Lohr/NPR

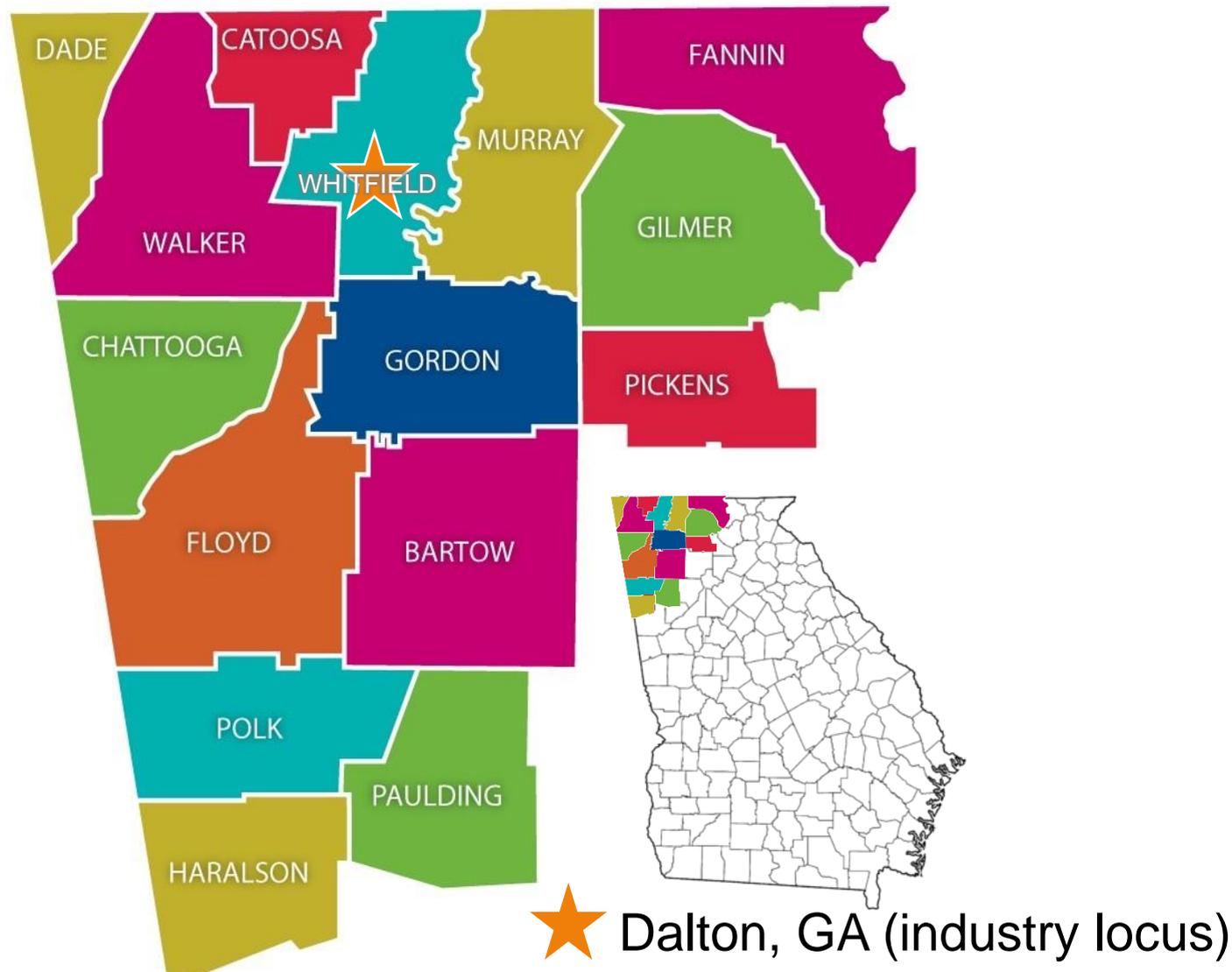
Georgia Tech Enterprise Innovation Institute



Georgia Tech Enterprise Innovation Institute *with*
The Northwest Georgia Regional Commission

Northwest Georgia: Fast Facts

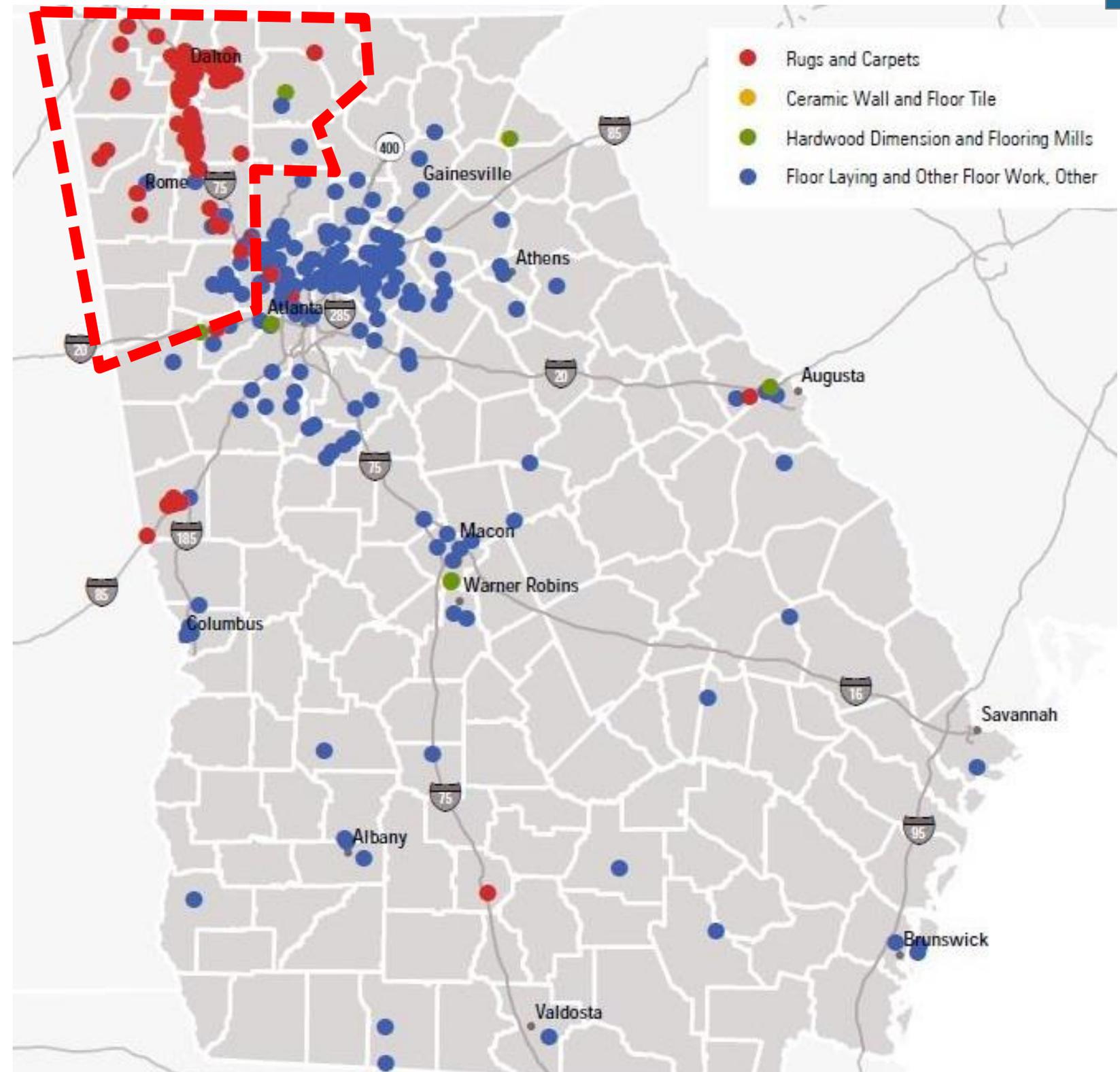
- 863,217 pop. (15 counties)
- 9.5% Latino (Whitfield County 32% Latino)
- 75% high school graduation rate
- 1,107 manufacturing firms, 60k manufacturing workers (25% of regional employment)



Floor Covering Industry Profile

- 32,801 employees (2012)
- 47% of the U.S. exports of carpets and other textile floor coverings originate in Georgia
- 80% of US carpet and rug market
- Multiple large and medium-sized players

13.6% of total employment
in Northwest Georgia (2012)



KTS: What is Floor Covering?



KTS: What is Floor Covering?

5-Digit NAICS	NAICS Title	LQ (2012)	National Rank
31311	Fiber, Yarn, and Thread Mills	81.1	2
31321	Broadwoven Fabric Mills	40.6	4
31322	Narrow Fabric Mills and Schiffli Machine Embroidery	1.4	4
31323	Nonwoven Fabric Mills	8.5	4
31331	Textile and Fabric Finishing Mills	18.8	4
31411	Carpet and Rug Mills	298.7	1
31499	All Other Textile Product Mills	4.4	2
32191	Millwork	1.5	21
32522	Artificial and Synthetic Fibers and Filaments Manufacturing	8.0	13
32619	Other Plastics Product Manufacturing	2.7	16
32712	Clay Building Material and Refractories Manufacturing	2.9	6
33324	Industrial Machinery Manufacturing	1.9	24
33999	All Other Miscellaneous Manufacturing	0.7	36
Floor covering Industry AVERAGE		36.3	

IMCP Phase 1 KTS Cluster SWOT

◎ Strengths

- Rapid response to new markets, products, and economic trends
- Adequate access to capital, low debt, local contraction

◎ Weaknesses

- Skilled labor shortage
- Lack of research institution connection
- Some lack of state recognition/support (an “it will always be there” mindset)

◎ Opportunities

- Creation of an innovation-driven regional culture (i.e., startups, entrepreneurs)
- Up-training/re-training of ready workforce that “knows” the industry

◎ Threats

- *Competitiveness* more than *sharing* among the major players; increased global competition
- *Consolidation* rather than *entrepreneurship*
- Lack of STEM education and recognition of manufacturing as a viable career choice

IMCP Phase 1 Highlights

Advanced Manufacturing Strategy (Sept.2013 – Sept. 2014)

- ⊙ The NWGA region has an **established advantage in floor covering**
- ⊙ Right ingredients for **growth**
- ⊙ **Stagnant clusters** can be accelerated
- ⊙ Best practices  **RESULTS!**

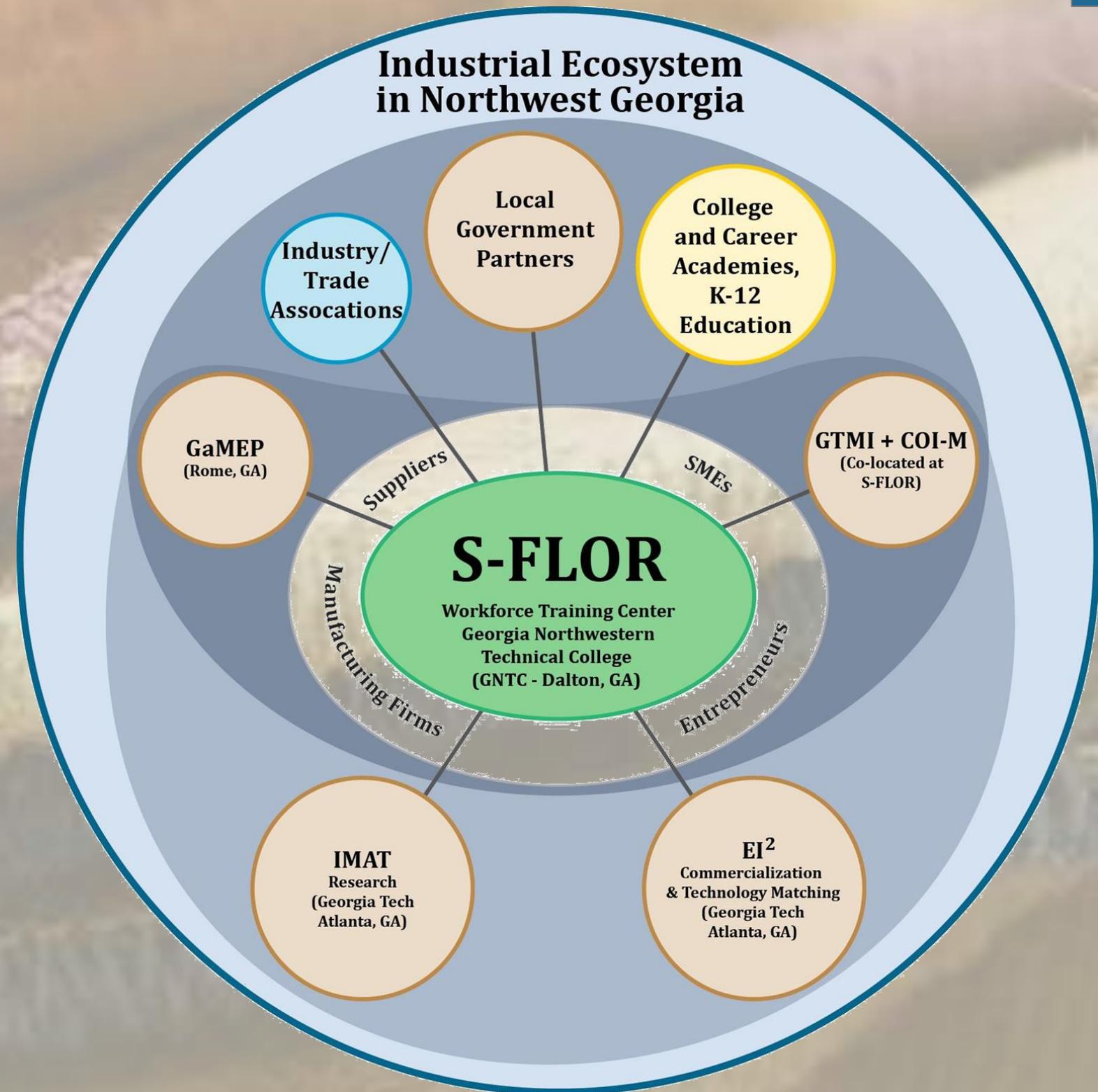
Key Findings for Implementation (September 2014 – Present)

- ⊙ Collaboration between university/technical colleges and industry
- ⊙ Industry-specific degree programs
- ⊙ Co-location of equipment/R&D/entrepreneurs/growing companies
- ⊙ Leverage state support

KTS Strategy Development

How Will S-FLOR Help Leverage the Cluster?

- ⊙ Integrated industry-university assets (GaMEP, iMAT, GTMI)
- ⊙ Specialized degree programs
- ⊙ Professional enrichment and “up-training”
- ⊙ Commercialization assistance and technology matching
- ⊙ Entrepreneurial development
- ⊙ More interconnected supplier network
- ⊙ Cross-industry application



Strengthening the KTS Cluster

S-FLOR

*A Hub for Advancing
Workforce Readiness
and Driving Innovation
in the KTS*



Workforce Training & Education: Specialized Degree Programs; Advanced Manufacturing Academy



Infrastructure: Improve exporting and access to Port of Savannah



Research & Innovation: Regional Sustainable Business Forum; entrepreneurial opportunities



Marketing: Teachers in Industry Program; apprentice/internships

Thank You!

Questions?

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Northwest Georgia Advanced Manufacturing Strategy page:

<http://www.nwgrc.org/category/northwest-georgia-regional-manufacturing-strategy/>

