



## Manufacturing Activity: Tennessee & Our Neighbors

*Information Flyer Set 2  
for  
Strategic Planning for Tennessee Agriculture*



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# Tennessee & Our Neighbors: Manufacturing Activity

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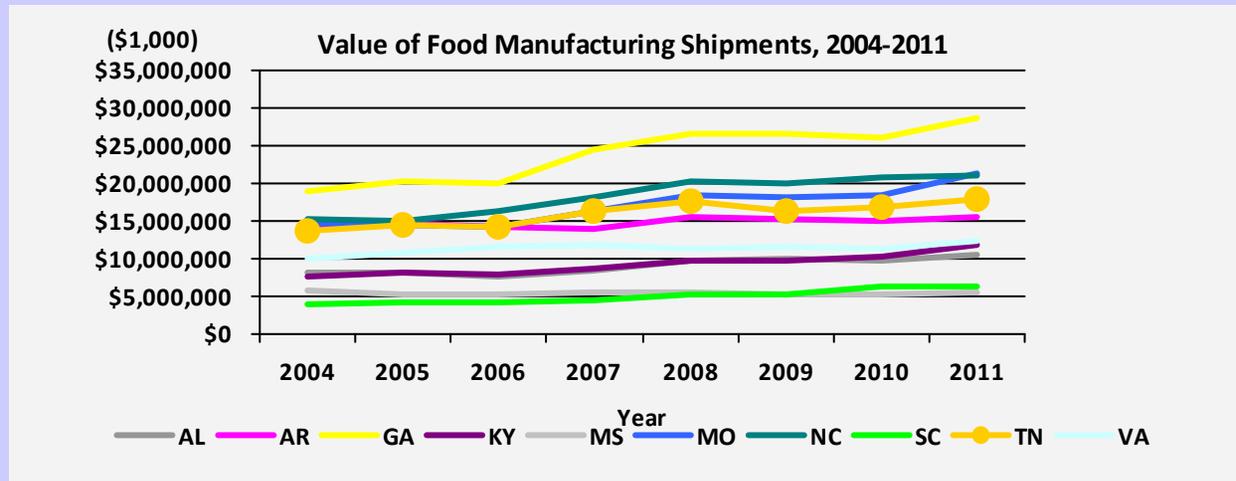
● In 2011, according to Census Bureau Statistics, Tennessee's value of food manufacturing shipments was nearly \$17.9 billion.

● Tennessee ranks 4th behind:

1. Georgia-\$28.7 billion
2. Missouri-\$21.3 billion
3. North Carolina-\$21.1 billion
4. **Tennessee-\$17.9 billion**

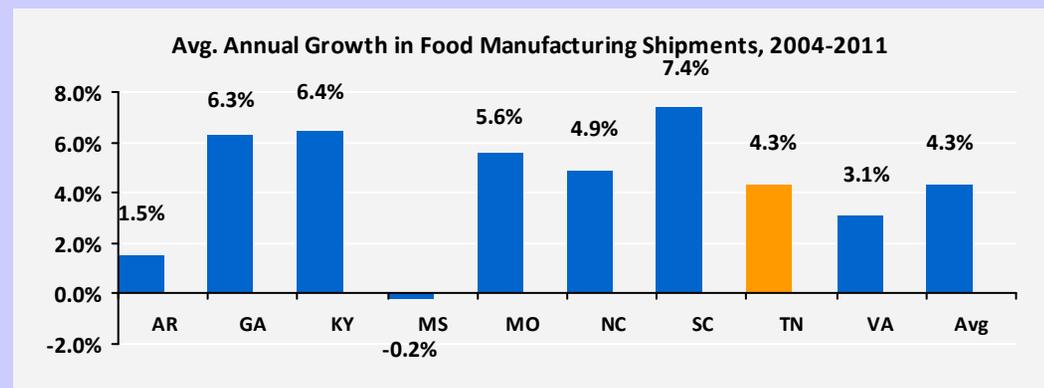
● From 2004 to 2011, Tennessee's food manufacturing industry shipments increased in value from \$13.6 billion to \$17.9 billion.

Food Manufacturing (NAICS 311) Value of Shipments (\$1,000)											
Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia	
2004	\$8,193,563	\$14,107,240	\$19,077,808	\$7,762,430	\$5,691,262	\$14,810,533	\$15,298,905	\$3,902,740	\$13,561,974	\$10,096,038	
2005	\$8,271,890	\$14,805,094	\$20,204,730	\$8,164,817	\$5,260,784	\$14,591,894	\$15,017,237	\$4,188,593	\$14,539,810	\$10,726,077	
2006	\$7,746,115	\$14,203,966	\$19,940,266	\$7,953,721	\$5,240,505	\$14,158,570	\$16,212,791	\$4,307,930	\$14,120,493	\$11,517,353	
2007	\$8,321,687	\$13,833,453	\$24,477,470	\$8,670,511	\$5,406,099	\$16,216,634	\$18,035,714	\$4,460,978	\$16,239,145	\$11,813,134	
2008	\$9,661,432	\$15,606,389	\$26,708,993	\$9,787,826	\$5,525,202	\$18,529,042	\$20,279,117	\$5,304,304	\$17,723,753	\$11,411,745	
2009	\$9,871,503	\$15,326,486	\$26,526,766	\$9,645,619	\$5,258,681	\$18,197,143	\$20,027,158	\$5,385,865	\$16,234,517	\$11,505,900	
2010	\$9,773,211	\$15,092,025	\$26,053,317	\$10,154,683	\$5,241,688	\$18,517,413	\$20,917,509	\$6,244,893	\$16,777,791	\$11,373,516	
2011	\$10,518,721	\$15,459,649	\$28,738,544	\$11,805,731	\$5,565,931	\$21,334,267	\$21,127,867	\$6,364,720	\$17,852,162	\$12,384,541	



● Tennessee's growth rate in food manufacturing shipments between 2004 and 2011 was at the regional average (4.3%).

● States with higher growth rates included SC, KY, GA, MO, and NC.





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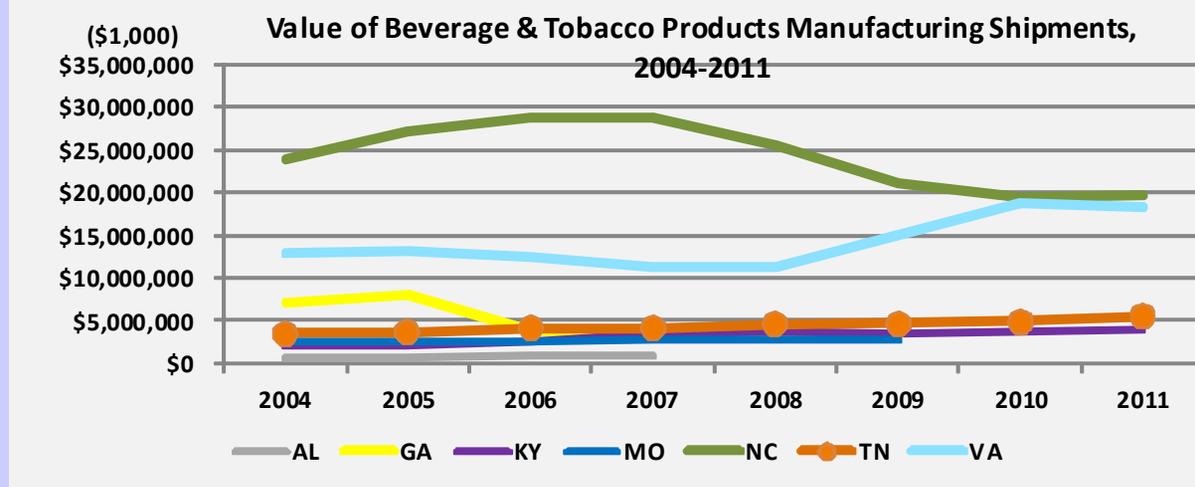
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• In 2011, according to Census Bureau Statistics, Tennessee's value of beverage & tobacco products manufacturing shipments was nearly \$5.6 billion.

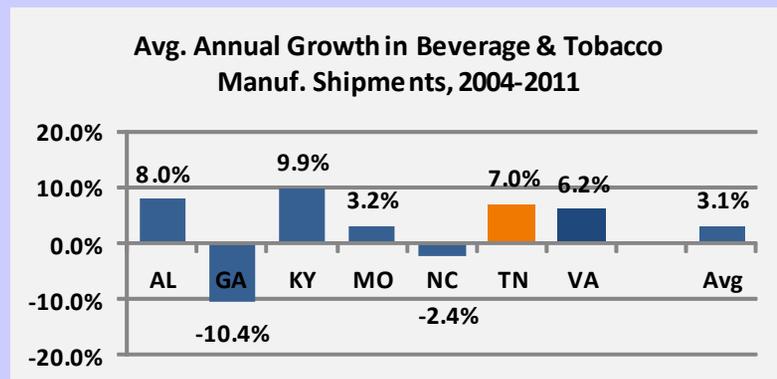
• Other states with a higher value of shipments include North Carolina and Virginia.

Beverage & Tobacco Products (NAICS 312) Value of Shipments (\$1,000)										
Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia
2004	\$752,072		\$7,114,321	\$2,119,650		\$2,444,394	\$24,029,094		\$3,485,251	\$12,855,957
2005	\$752,072		\$8,025,070	\$2,166,410		\$2,506,276	\$27,198,707		\$3,702,676	\$13,065,294
2006	\$783,678		\$3,852,520	\$2,473,269		\$2,538,463	\$28,764,444		\$4,063,730	\$12,478,935
2007	\$938,103		\$3,451,356	\$3,425,706		\$2,738,284	\$28,928,091		\$4,167,272	\$11,262,239
2008			\$3,288,669	\$3,606,548		\$2,727,739	\$25,461,664		\$4,608,430	\$11,397,157
2009	\$810,747		\$3,358,158	\$3,481,509		\$2,857,261	\$21,151,315		\$4,720,518	\$14,975,076
2010				\$3,694,560			\$19,424,666		\$4,942,316	\$18,730,058
2011				\$3,941,961		\$3,152,199	\$19,625,191		\$5,556,564	\$18,422,932



• Tennessee's growth rate in beverage & tobacco products manufacturing shipments between 2004 and 2011 averaged 7.0%.

• The industry average when including the surrounding states was 3.1%. Kentucky has a higher growth rate than Tennessee at 9.9%.





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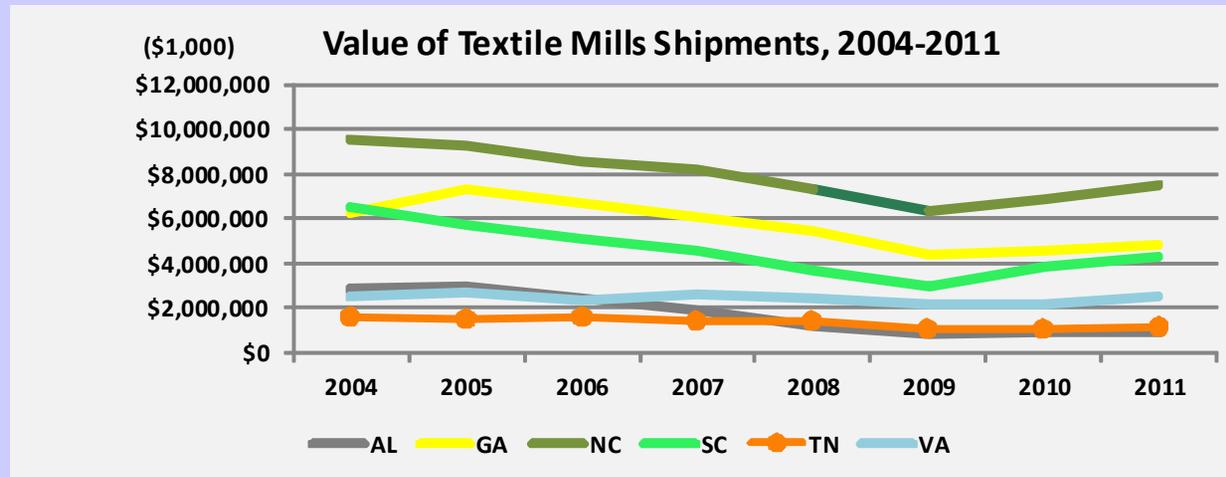
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•In 2011, according to Census Bureau Statistics, Tennessee's value of textile mills manufacturing shipments was \$1.1 billion.

•States with higher values of shipments include North Carolina, Georgia, South Carolina, Virginia. Alabama had the lowest shipment value.

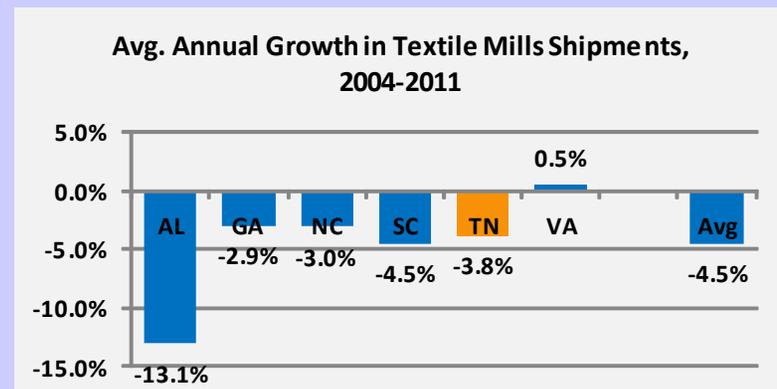
Textile Mills (NAICS 313) Value of Shipments (\$1,000)

Year	Alabama	Georgia	N. Carolina	S. Carolina	Tennessee	Virginia
2004	\$2,831,721	\$6,210,660	\$9,556,469	\$6,502,976	\$1,542,159	\$2,507,253
2005	\$2,923,552	\$7,344,881	\$9,254,720	\$5,734,760	\$1,513,601	\$2,701,564
2006	\$2,427,004	\$6,680,238	\$8,531,840	\$5,102,424	\$1,557,102	\$2,284,676
2007	\$1,871,320	\$6,081,672	\$8,168,956	\$4,589,328	\$1,424,116	\$2,568,006
2008	\$1,201,568	\$5,434,930	\$7,330,853	\$3,683,124	\$1,412,137	\$2,454,258
2009	\$830,560	\$4,393,397	\$6,327,660	\$2,931,635	\$1,003,024	\$2,130,871
2010	\$860,695	\$4,557,600	\$6,824,530	\$3,877,944	\$1,049,432	\$2,169,000
2011	\$931,629	\$4,794,303	\$7,514,699	\$4,244,737	\$1,112,345	\$2,482,849



•Tennessee's growth rate in textile mills manufacturing shipments between 2004 and 2011 declined an average of 3.8%.

•The industry average growth rate for all states was -4.5%. Alabama had the largest decline in growth rate at -13.1%. Virginia's average growth rate between 2004 and 2011 was 0.5%.





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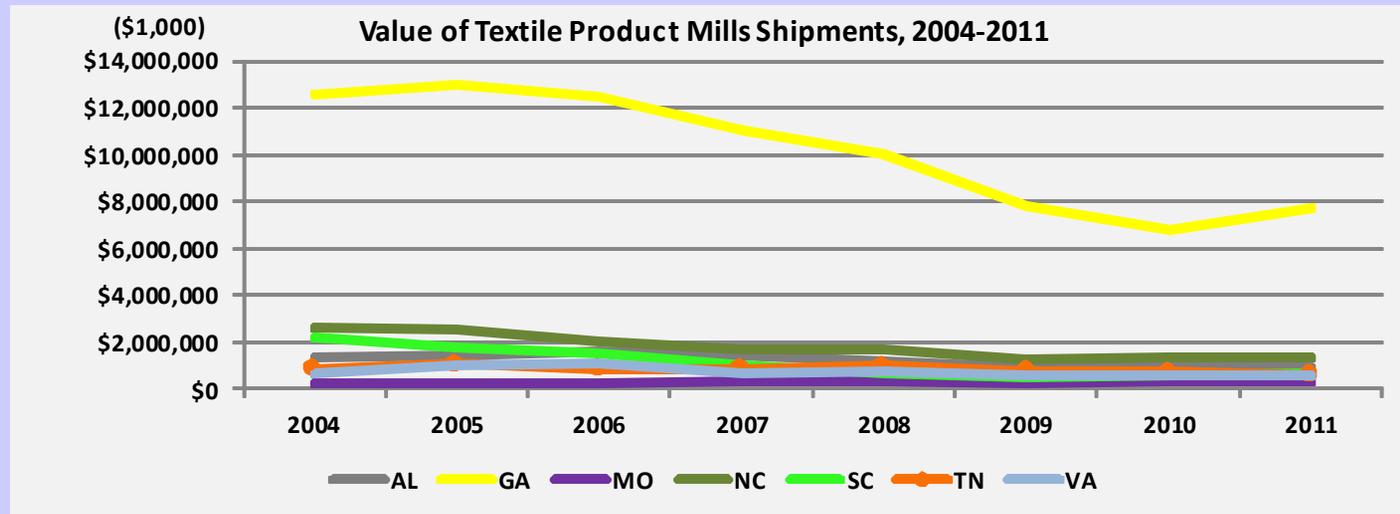
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• In 2011, according to Census Bureau Statistics, Tennessee's value of textile product mills manufacturing shipments was close to \$0.6 million.

• Georgia and North Carolina dominate textile product mills manufacturing for the SE Region around Tennessee.

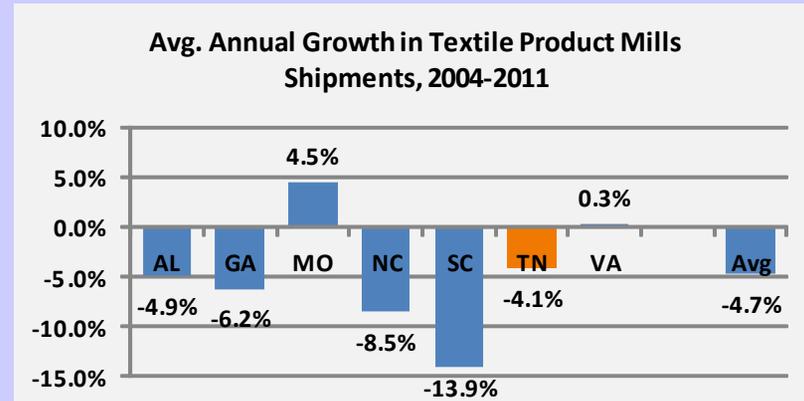
• For 2011, Tennessee's shipments were greater than Missouri and Virginia.

Textile Product Mills (NAICS 314) Value of Shipments (\$1,000)								
Year	Alabama	Georgia	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia	
2004	\$1,369,361	\$12,594,968	\$256,377	\$2,597,046	\$2,159,814	\$858,949	\$688,672	
2005	\$1,385,470	\$12,990,048	\$238,022	\$2,545,834	\$1,796,019	\$1,043,737	\$1,006,126	
2006	\$1,575,266	\$12,443,381	\$267,907	\$2,047,869	\$1,546,055	\$851,967	\$1,055,193	
2007	\$1,381,234	\$11,071,148	\$325,884	\$1,691,257	\$1,001,548	\$844,971	\$687,222	
2008	\$1,156,667	\$10,009,076	\$339,448	\$1,651,766	\$625,680	\$970,294	\$725,763	
2009	\$875,994	\$7,828,305	\$206,844	\$1,289,033	\$502,661	\$759,012	\$574,657	
2010	\$971,328	\$6,782,243	\$308,014	\$1,348,394	\$577,939	\$716,716	\$605,178	
2011	\$904,101	\$7,708,134	\$277,863	\$1,336,275	\$638,892	\$583,628	\$580,956	



• Tennessee's growth rate in textile product mills manufacturing shipments between 2004 and 2011 declined an average of 4.1%.

• The industry average growth rate for all states was -4.7%. S. Carolina had the largest decline in growth rate at -13.9%. Virginia's average growth rate between 2004 and 2011 was 0.3%.





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- Available statistics from the U.S. Census for Tennessee and surrounding states for both apparel manufacturing and leather and applied products manufacturing value of shipments are sporadic.

- For apparel manufacturing, North Carolina led, followed by Alabama and Missouri.

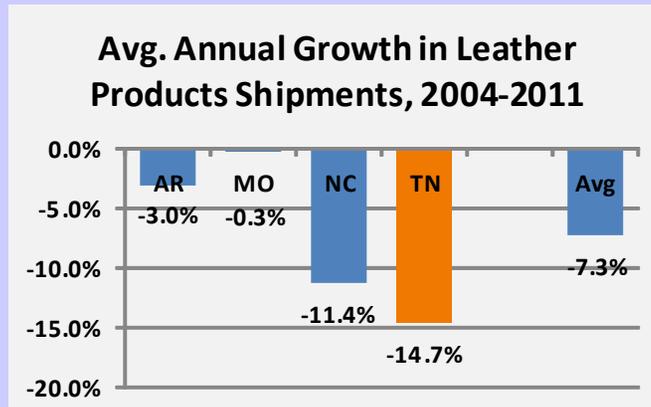
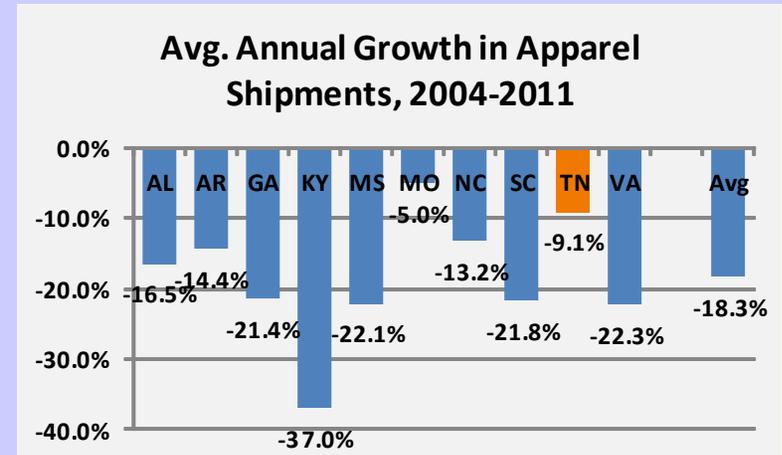
- For leather and applied products value of shipments, Missouri has the largest shipment value followed by Alabama.

- For 2009, TN shipment values were close to \$483 million for apparel products, which were greater than Georgia's, Mississippi's, Missouri's, S. Carolina's, and Virginia's shipments. For available statistics for leather and applied products, Missouri followed by Alabama have the largest shipment values.

Apparel Manufacturing (NAICS 315) Value of Shipments (\$1,000)										
Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia
2004	\$1,561,212	\$300,813	\$719,069	\$754,504	\$596,936	\$299,704	\$3,930,433	\$456,902	\$818,231	\$644,103
2005	\$1,595,714	\$354,772	\$639,436	\$503,908	\$463,296	\$343,176	\$3,870,486	\$461,085	\$810,161	\$519,610
2006	\$1,771,133	\$272,214	\$618,401	\$298,509	\$361,832	\$324,898	\$3,615,063	\$388,821	\$672,959	\$351,336
2007	\$989,862	\$244,914	\$189,995			\$166,757	\$2,003,566			
2008	\$561,695	\$141,051	\$179,907			\$169,747	\$1,491,291	\$276,093		
2009	\$580,922		\$136,922		\$149,238	\$169,517	\$1,310,003	\$136,282	\$482,944	\$87,059
2010	\$484,425		\$115,243			\$152,133	\$1,279,386			\$73,948
2011	\$346,826			\$114,978		\$171,660	\$1,281,802	\$128,359		

- Tennessee's growth rate in apparel manufacturing shipments and leather & applied products shipments between 2004 and 2011 declined an average of 9.1% and 14.7%, respectively.

- The industry average growth rate for all states was -18.3% for apparel manufacturing and -7.3% for leather & allied products.



Leather & Applied Products (NAICS 316) Value of Shipments (\$1,000)				
Year	Alabama	Missouri	N. Carolina	Tennessee
2004	\$166,734	\$401,684		\$209,404
2005	\$166,653	\$396,926	\$190,392	\$193,367
2006	\$156,800	\$414,229	\$135,451	\$151,509
2007		\$398,132	\$143,719	
2008	\$137,736	\$258,539		
2009	\$139,295	\$193,077		
2010	\$147,705	\$289,971		
2011	\$123,498	\$315,069		



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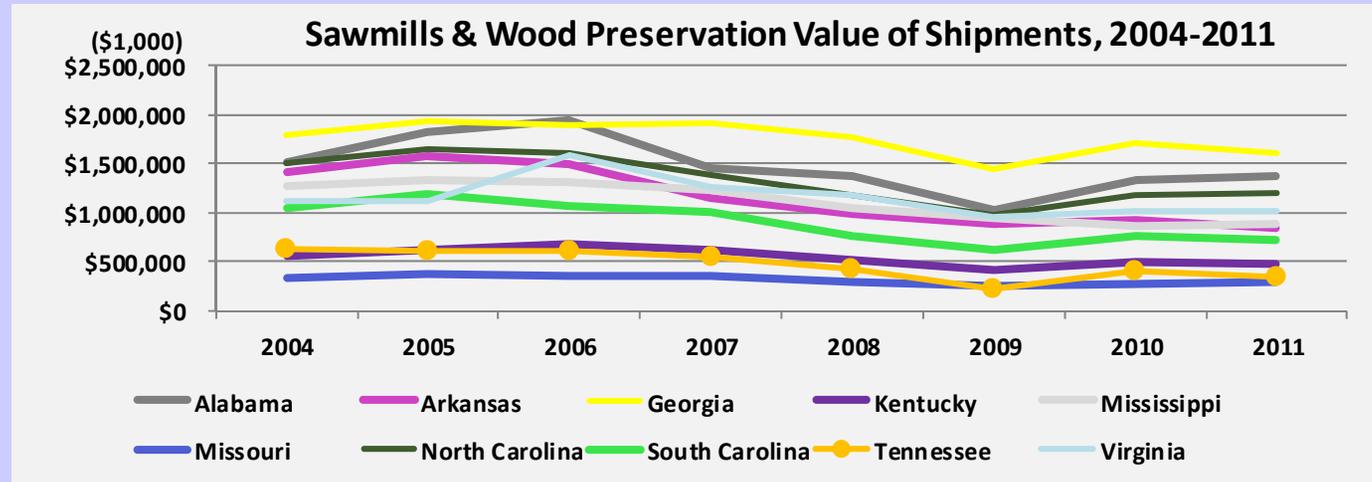
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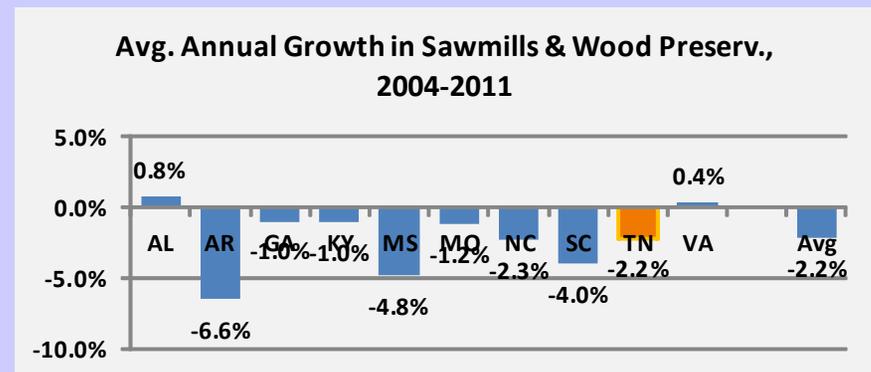
- In 2011, the value of shipments from Tennessee's sawmills and wood preservation facilities was \$331.7 million.
- For 2011, the top three states having the largest value of shipments for sawmills & wood preservation are Alabama, Georgia, and Virginia. Of the surrounding states for 2011, Tennessee ranks 9th for value of shipments, exceeding Missouri's shipment value by close to \$47.0 million.

Sawmills & Wood Preservation (NAICS 3211) Value of Shipments (\$1,000)

Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia
2004	\$1,504,243	\$1,421,054	\$1,790,663	\$546,245	\$1,278,867	\$324,612	\$1,506,719	\$1,052,167	\$633,026	\$1,116,153
2005	\$1,820,376	\$1,583,655	\$1,924,677	\$614,215	\$1,329,218	\$365,108	\$1,645,252	\$1,191,221	\$599,847	\$1,108,065
2006	\$1,946,782	\$1,486,313	\$1,891,530	\$676,415	\$1,301,270	\$351,470	\$1,600,741	\$1,061,203	\$601,055	\$1,589,485
2007	\$1,449,106	\$1,140,427	\$1,909,158	\$604,559	\$1,234,739	\$338,384	\$1,372,775	\$1,006,104	\$537,090	\$1,258,223
2008	\$1,379,999	\$988,295	\$1,770,731	\$517,076	\$1,037,449	\$287,777	\$1,172,076	\$757,728	\$412,529	\$1,168,088
2009	\$1,016,762	\$884,051	\$1,446,925	\$417,219	\$945,793	\$238,792	\$976,154	\$619,457	\$210,411	\$950,072
2010	\$1,332,896	\$924,390	\$1,699,204	\$493,712	\$862,044	\$273,144	\$1,181,705	\$748,389	\$397,268	\$1,011,322
2011	\$1,374,363	\$845,234	\$1,607,530	\$475,364	\$888,823	\$284,782	\$1,204,331	\$723,836	\$331,657	\$1,012,695



- Tennessee's growth rate in sawmills & wood preservation shipments between 2004 and 2011 declined an average of 2.2%.
- The industry average growth rate for all states was -2.2%. Arkansas had the largest decline in growth rate at -6.6%. Alabama and Virginia's average growth rate between 2004 and 2011 was 0.8% and 0.4%, respectively.





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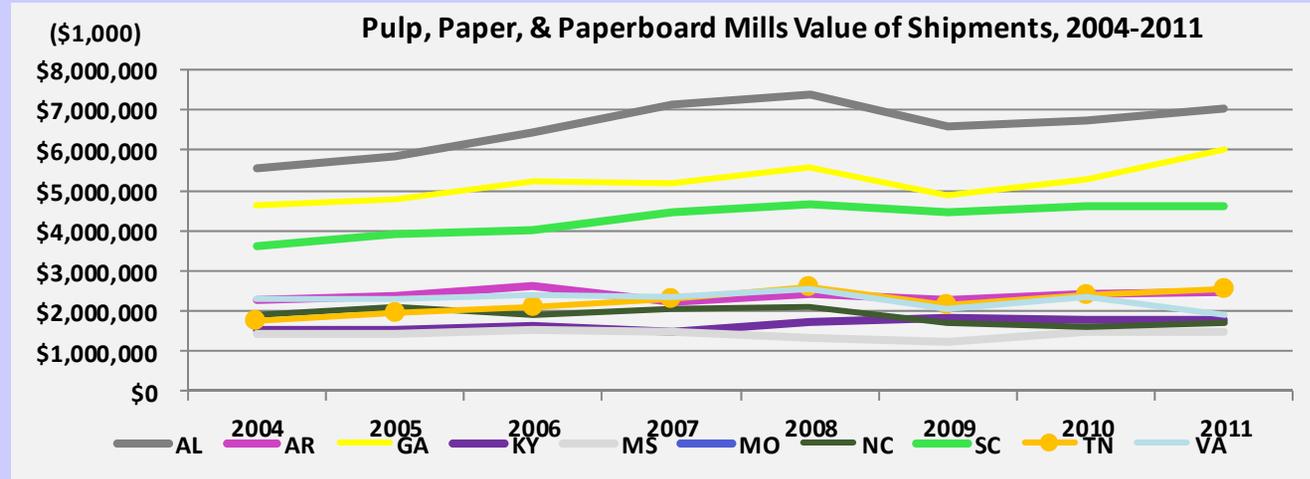
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•In 2011, the value of pulp, paper, & paperboard shipments from Tennessee was \$2.5 billion.

•For 2011, the top three states having the largest value of shipments for pulp, paper, & paperboard mills are Alabama, Georgia, and S. Carolina.

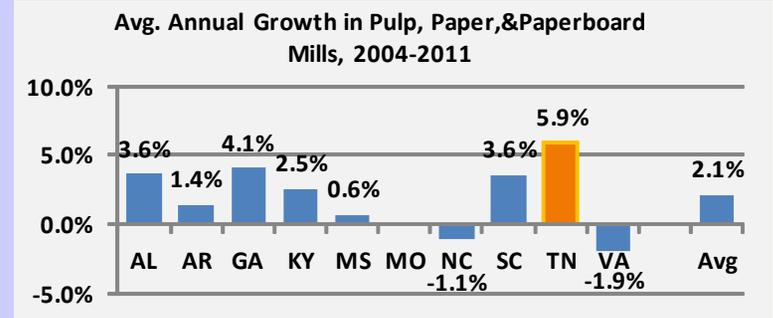
•Of the surrounding states for 2011, Tennessee ranks 4th for value of shipments, exceeding Arkansas', Kentucky's, Mississippi's, N. Carolina's, and Virginia's shipment values.

Pulp, Paper, & Paperboard Mills (NAICS 3221) Value of Shipments (\$1,000)										
Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia
2004	\$5,557,502	\$2,287,020	\$4,643,749	\$1,524,165	\$1,443,782	Not Disclosed	\$1,901,610	\$3,617,887	\$1,761,834	\$2,301,653
2005	\$5,843,954	\$2,385,229	\$4,777,343	\$1,519,723	\$1,452,877	Not Disclosed	\$2,090,241	\$3,897,336	\$1,931,760	\$2,297,329
2006	\$6,449,731	\$2,634,474	\$5,226,589	\$1,612,950	\$1,532,809	Not Disclosed	\$1,895,874	\$4,010,302	\$2,087,673	\$2,412,839
2007	\$7,156,365	\$2,226,601	\$5,181,897	\$1,493,281	\$1,461,579	Not Disclosed	\$2,044,860	\$4,459,808	\$2,273,168	\$2,348,089
2008	\$7,357,513	\$2,415,355	\$5,580,592	\$1,707,524	\$1,318,065	Not Disclosed	\$2,077,130	\$4,659,105	\$2,571,086	\$2,537,020
2009	\$6,613,024	\$2,267,968	\$4,853,666	\$1,802,688	\$1,236,375	Not Disclosed	\$1,678,864	\$4,442,022	\$2,132,834	\$2,059,307
2010	\$6,720,529	\$2,436,833	\$5,286,913	\$1,791,534	\$1,490,782	Not Disclosed	\$1,595,776	\$4,603,084	\$2,396,822	\$2,363,451
2011	\$7,030,127	\$2,457,655	\$5,993,157	\$1,786,652	\$1,466,690	Not Disclosed	\$1,692,199	\$4,586,023	\$2,547,682	\$1,907,987



•Tennessee's growth rate in pulp, paper, & paperboard mills shipments between 2004 and 2011 increased an average of 5.9%.

•The industry average growth rate for all states was 2.1%. Tennessee had the highest average growth rate among the surrounding states, followed by Alabama and S. Carolina both at 3.6%. Virginia had the largest decline in growth rate at -1.9%.





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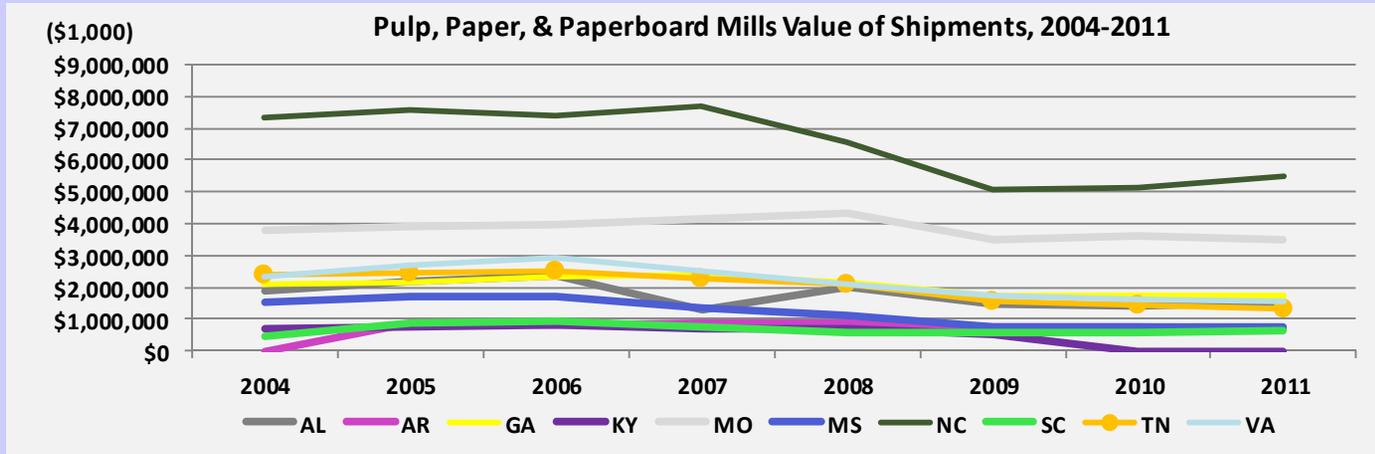
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•In 2011, the value of shipments of furniture & related products was \$1.3 billion.

•For 2011, the top three states having the largest value of shipments for furniture & related products are N. Carolina, Mississippi, and Georgia.

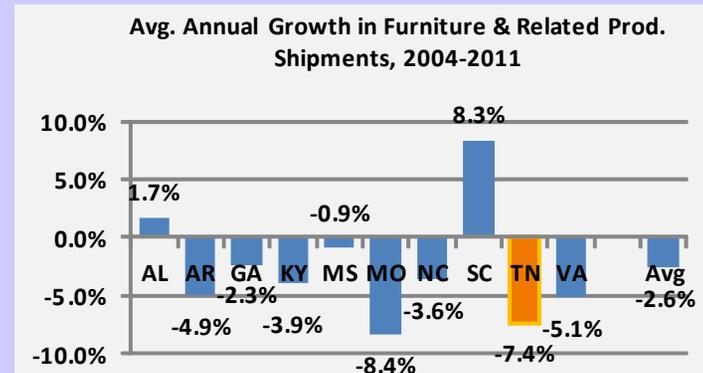
•Of the surrounding states for 2011, Tennessee ranks 6th for value of shipments, exceeding Missouri's, Arkansas', S. Carolina's and Kentucky's shipment values.

Furniture & Related Products (NAICS 337) Value of Shipments (\$1,000)											
Year	Alabama	Arkansas	Georgia	Kentucky	Mississippi	Missouri	N. Carolina	S. Carolina	Tennessee	Virginia	
2004	\$1,882,028	\$997,823	\$2,094,320	\$675,723	\$3,790,925	\$1,522,425	\$7,344,719	\$469,592	\$2,371,656	\$2,339,149	
2005	\$2,188,964	\$857,357	\$2,124,407	\$754,233	\$3,922,734	\$1,695,969	\$7,555,390	\$860,058	\$2,467,588	\$2,659,724	
2006	\$2,379,164	\$833,970	\$2,308,784	\$815,873	\$3,986,241	\$1,686,681	\$7,399,719	\$951,717	\$2,485,411	\$2,930,741	
2007	\$1,289,013	\$881,623	\$2,378,549	\$719,265	\$4,161,174	\$1,371,864	\$7,684,473	\$759,022	\$2,278,579	\$2,481,141	
2008	\$1,985,898	\$876,977	\$2,170,431	\$673,698	\$4,301,543	\$1,092,109	\$6,534,536	\$606,086	\$2,110,060	\$2,090,629	
2009	\$1,443,418	\$731,180	\$1,736,247	\$532,354	\$3,504,314	\$775,010	\$5,084,560	\$577,656	\$1,540,337	\$1,711,513	
2010	\$1,410,824	\$772,510	\$1,722,025	\$0	\$3,600,336	\$744,451	\$5,108,035	\$588,925	\$1,446,508	\$1,639,141	
2011	\$1,529,765	\$681,626	\$1,723,166	\$0	\$3,489,351	\$764,249	\$5,464,121	\$634,034	\$1,336,446	\$1,538,383	



•Tennessee's growth rate in furniture & related products shipments between 2004 and 2011 decreased an average of 7.4%.

•The industry average growth rate for all states was -2.6%. S. Carolina had the highest average growth rate among the surrounding states at 8.3%. Missouri had the largest decline in growth rate at -8.4%.





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- Tennessee's value of shipments from food products manufacturing; beverage & tobacco products manufacturing; and pulp, paper, & paperboard manufacturing all saw positive overall growth between 2004 to 2011.
- Industries with negative growth included textiles, textile products, apparel, leather, sawmills, and furniture.
- Several of the industries took a downturn in the 2008-2009 economic slowdown.

