



**BUILDING RELATIONSHIPS.
DELIVERING OPPORTUNITY.**

Target Industry Groups

Sylvester - Worth County, Georgia

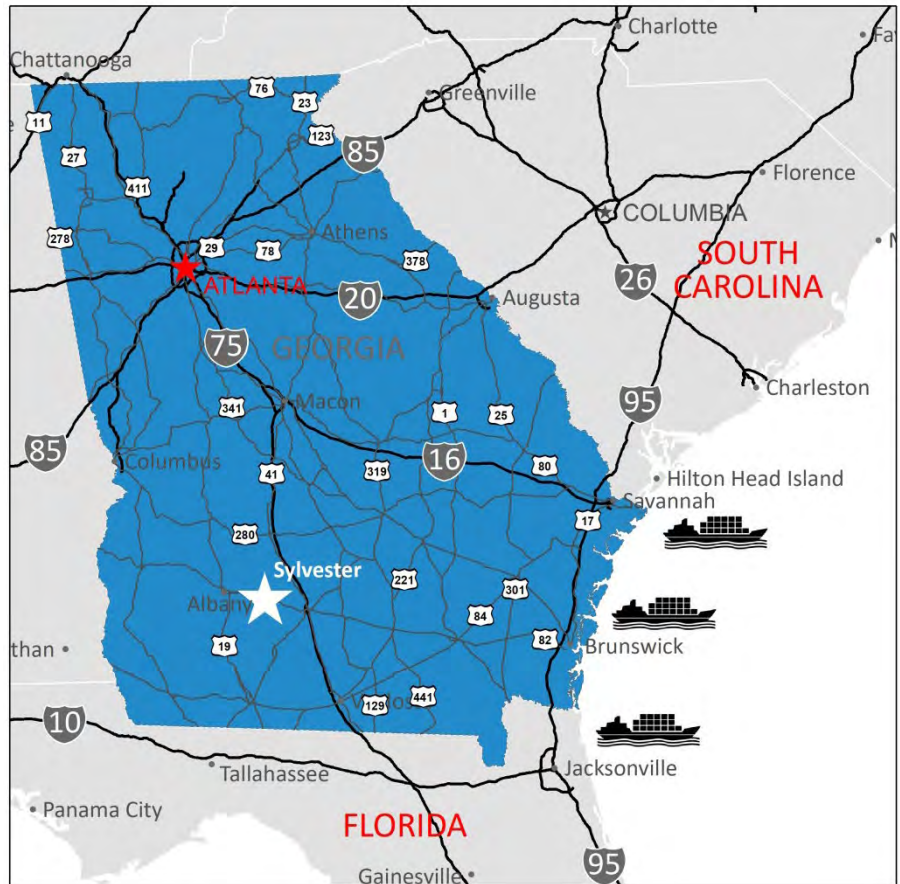


Executive Summary

Sylvester-Worth County provides a favorable business environment to attract and retain successful companies in the community. Sylvester-Worth County offers a great quality of life that is directly and indirectly linked to its business community through quality education, workforce development, and a business friendly environment that any industry would embrace.

A community's marketing efforts should always include a variety of industries that offer a symbiotic fit with the community's culture. This document offers suggested target industry groups that Sylvester-Worth County may want to consider as targeted industry types. Harvard Business School Professor Michael E. Porter found that location characteristics play an important role in the success of a region's industries. Porter wrote that implementing a targeted approach with industry clusters could help firms achieve a competitive advantage by promoting their common interest.

In particular, Sylvester and Worth County are well suited but not limited to the following goods-producing* industry groups that match with the local and regional workforce, location, and community culture. The target industry groups were identified by the ECG Office of Economic & Community Development from a comprehensive assessment of local, regional, and state economic data. Sylvester-Worth also have demand for two service-providing* industry groups, which are discussed in the Appendix.



**For the purposes of this report goods-producing industry groups include agriculture, forestry, fishing, hunting, mining, quarrying, oil and gas extraction, construction, manufacturing, and transportation and warehousing. Service-providing industry groups include wholesale and retail trade, utilities, information services, financial activities, professional and business services, education, health services, leisure and hospitality, and government. Note that the U.S. Bureau of Labor Statistics typically considers transportation and warehousing to be part of the service-providing industry supersector group, while this report classifies it as a goods-producing industry group.*

Identified Target Industry Groups

Target goods-producing industry groups identified in this report are advanced manufacturing, regional logistics, specialized agriculture, and food processing. Two additional service-providing industry groups were identified, including health care and aging-related services, and are discussed in the Appendix.

Agriculture and **food processing** have strong presences in Sylvester-Worth County that have grown over time. It may be prudent to recruit **specialized agriculture** from a diverse array of crops to strengthen the resilience of the agriculture sector in Sylvester and potentially attract additional business from agritourism. Some industries such as **advanced manufacturing** and **health care** are not concentrated in Sylvester but have high concentrations in the surrounding region, indicating that there is regional workforce available for those industries. **Aging related services** is not concentrated in Sylvester-Worth but the large aging population in the region will need these services in the future. The lack of concentration for this industry group combined with the increasing aging population may indicate a need for senior housing and services that serve the senior population. Sylvester is in a strategic location with proximity to a major interstate and rail lines and within driving distance of several population centers in South Georgia. **Regional logistics** operations may be good recruitment targets. Sylvester has access to fiber internet services with symmetric download/upload speeds ranging from 10Mb to 10Gb to suit every business need. This positions Sylvester uniquely as a potentially desirable location for **call centers**, **technical support centers**, or **data centers**.

Target Goods-Producing Industry Groups

ADVANCED MANUFACTURING



Agricultural Equipment & Fertilizer Manufacturing
Packaging Material Manufacturing
Textile Manufacturing
Trailers & Related Vehicle Manufacturing

COMMUNICATIONS



Call Centers
Technical Support Centers
Data Centers

REGIONAL LOGISTICS



Warehousing
Regional Distribution & Trucking

SPECIALIZED AGRICULTURE



Diversified & Niche Crop Agriculture
Agritourism

FOOD PROCESSING



Food Processing
Beverage Processing

Industry Group Concentrations

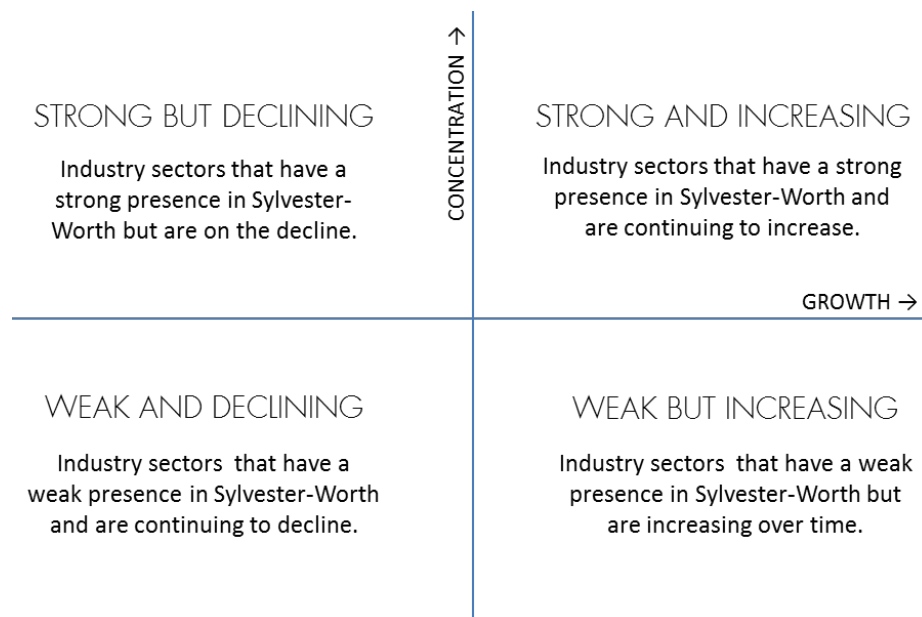
Identifying a region’s most concentrated and specialized industry groups is a crucial component of implementing an economic development strategy. Businesses often prefer to locate in regions where their industry and complementary industries already have a strong presence since they can be reasonably assured that the region’s workforce, logistics, and supplier networks are ready to meet their needs. In response to *Area Development’s* Corporate Survey, sixty percent of respondents said that the presence of activities similar to their own was a consideration when selecting a site. A Brookings Institution report concluded that “strong clusters foster innovation through dense knowledge flows and spillovers; strengthen entrepreneurship by boosting new enterprise formation and start-up survival; enhance productivity, income levels, and employment growth in industries; and positively influence regional economic performance.”

One powerful measure of industry concentration is the **location quotient**, or LQ, which measures how concentrated employment is in a given industry in a particular region as it compares with the industry’s employment concentration in the United States as a whole. An LQ greater than 1.00 indicates a higher concentration of an industry than the national average and an LQ less than 1.00 indicates a lower concentration of an industry than the national average. A location quotient, or LQ, is defined as follows:

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

It should be noted that existing industry group concentrations alone are not sufficient to determine what a region’s target industry groups should be. Rather, industry group concentrations should be taken as one part of a larger picture that is used to determine target industry groups. For instance, demographic trends, cultural fit and context, and community preferences are very important when determining target industry groups.

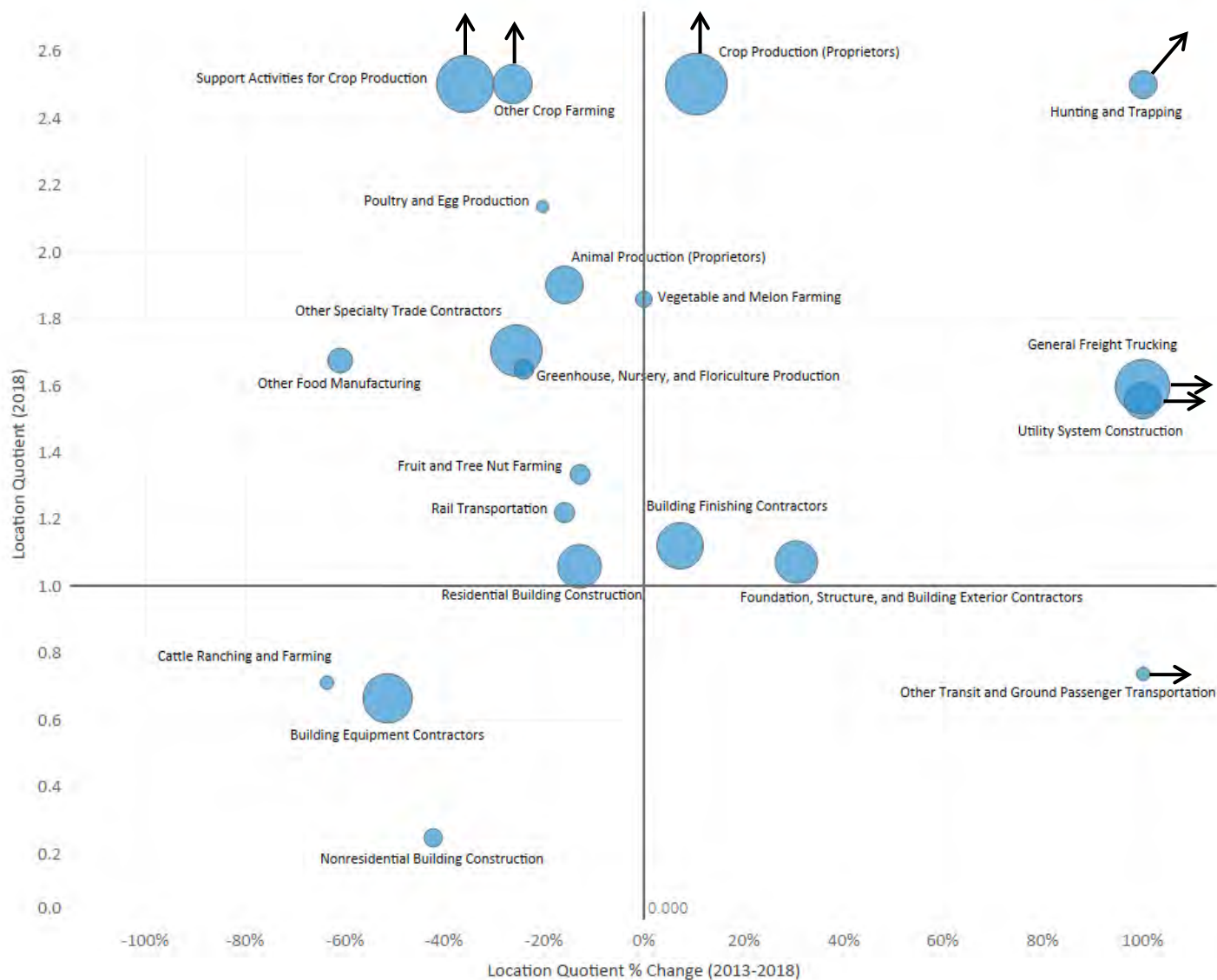
In an LQ bubble chart, the LQs of industries are plotted against the growth rate of the LQs. The sizes of the bubbles represent the employment numbers for each industry. Where an industry falls in the bubble chart tells us about the concentration and growth of the industry, with the four quadrants representing strong and increasing industries, strong but declining industries, weak but increasing industries, and weak and declining industries.



The LQ bubble chart for **Sylvester** illustrates that the strong growth industries are crop production; hunting and trapping; general freight trucking; utility system construction; building finishing contractors; and foundation, structure, and building exterior contractors. Several other agriculture, construction, and transportation industries are in the strong but declining quadrant of the chart. Similarly, the LQ bubble chart for **Worth County** has several industries in the strong and increasing quadrant of the chart, including hunting and trapping, rubber product manufacturing, other transit and ground passenger transportation, other animal production*, vegetable and melon farming, and fishing. Please see the Appendix for more details about each of the industries in Sylvester-Worth County.

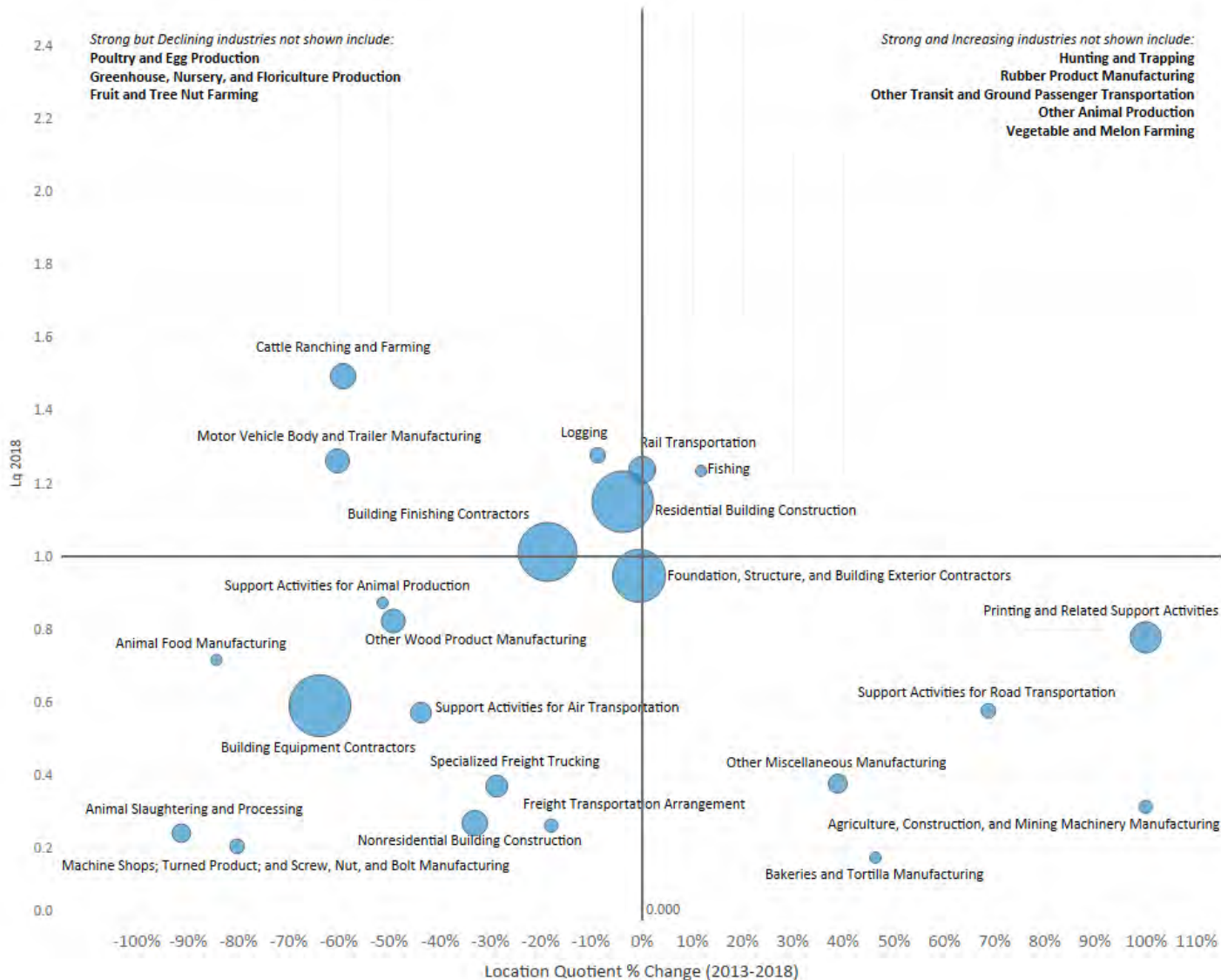
**Note: Other animal production includes farming of animals other than cows, chickens, pigs, goats, and sheep, such as quail, llamas, or buffalo. Other animal production can also include farming of any combination of traditional animals like cows, chickens, etc. or non-traditional animals where one animal farming activity cannot be identified as the primary activity.*

Sylvester, Georgia | Goods-Producing Industries



Sources: JobsEQ and U.S. Bureau of Labor Statistics. Analysis by ECG Office of Economic & Community Development.

Worth County, Georgia | Goods-Producing Industries



Sources: JobsEQ and U.S. Bureau of Labor Statistics. Analysis by ECG Office of Economic & Community Development.

State of Georgia Target Industries

State of Georgia Target Industries	
Aerospace	Food Processing*
Agribusiness*	Headquarters
Arts	Life Sciences
Automotive	Logistics & Supply Chain*
Corporate Innovation Centers	Manufacturing*
Defense	Technology*
Energy	Tourism*
Film & Entertainment	

**Indicates a Georgia target industry with a corresponding Sylvester-Worth County target industry group.*



The Georgia Department of Economic Development 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.

Statewide Economic Development Partners



Skilled Regional Workforce

Worth County is located within 50 miles of seven institutions of higher learning, including four technical colleges and three four-year colleges and universities. There are 40 higher learning institutions within 100 miles of Worth. This close proximity to technical colleges, colleges, and universities allows Worth to draw from a highly skilled workforce for a variety of positions. Worth County School District has an 82.1 percent high school graduation rate, which is lower than the state average and may need to be addressed.

Worth County is home to a new College and Career Academy as of the 2018-2019 academic year. Worth County College and Career Academy partners with Southern Regional Technical College to offer hands-on, work-related experience alongside high school and college courses. College and Career Academy (CCA) students graduate high school armed with career and technical skills. Commodore Conyers, another CCA, is located in Albany and serves Dougherty County Schools. To learn more about Georgia College and Career Academies, please visit <http://georgiacareeracademies.org/>.

Educational Attainment Levels: Population Aged 25 and Older Within 60 Minute Drive Time of Worth County

Education Level	2019		2024	
Less Than 9th Grade	18,596	8%	19,455	9%
9th Grade to 12th Grade	28,550	13%	27,950	13%
High School Diploma	77,472	35%	77,047	35%
Some College	45,490	20%	44,812	20%
Associate's Degree	17,506	8%	17,476	8%
Bachelor's Degree	20,609	9%	20,318	9%
Graduate Degree and Higher	13,860	6%	13,743	6%

Source: EMSI Q1.2019

Higher Education Awards and Enrollment For Worth and Surrounding Counties

All Award Levels	6,587
Certificate < 1 Yr	2,537
Certificate 1+ but < 2 Yr	847
Associate's	1,820
Certificate 2+ but < 4 Yr	135
Bachelor's	913
Post-Baccalaureate	0
Master's	293
Post-Master's	42
Doctorate	0

Source: JobsEQ. Note: Data is given for surrounding counties in 2017.

Counties not included either did not have awards and enrollment or data was not available.

Please see the Appendix for full awards and enrollment information by degree program.

College and Career Academies

Worth County College and Career Academy	
School District	Worth County
Post-Secondary Partners	Southern Regional Tech, Albany Tech
Business, Industry, and Community Partners	City of Sylvester, Phoebe Worth Medical Center, SBDC - UGA Small Business Development Center, Scales Systems and Automation LLC, Snipes Piggly Wiggly, Superior Machine Works, Sylvester-Worth County Chamber, Worth County Board of Commissioners, Worth County Schools
Pathways Offered*	Agriculture Architecture and Construction Arts, AV/Technology, and Communications Business Education and Training Finance Human Services Government and Public Administration Health Science Marketing Transportation and Logistics
School Enrollment (AY 18-19)*	879
Commodore Conyers College and Career Academy	
School District	Dougherty, Baker, Calhoun, and Terrell Counties
Post-Secondary Partners	Albany Tech, Albany State, Darton State
Business, Industry, and Community Partners	AEDC, Albany Area Chamber, MCLB, Phoebe Putney, P&G, Pfizer, Coats & Clark, MillerCoors, SASCO, Industry Roundtable, AB&T, Flint Community
Industry Certified Programs Offered	IOT, CAN, Construction, Diesel, Logistics, Electrical Assistant
Pathways Offered	Architecture and Construction Arts, AV/Technology, and Communications Aviation Business, Management, and Administration Education and Training Graphic Design Health Informatics Health Science Information Technology Mechatronics Science, Technology, Engineering, and Mathematics
School Enrollment (AY 18-19)	580

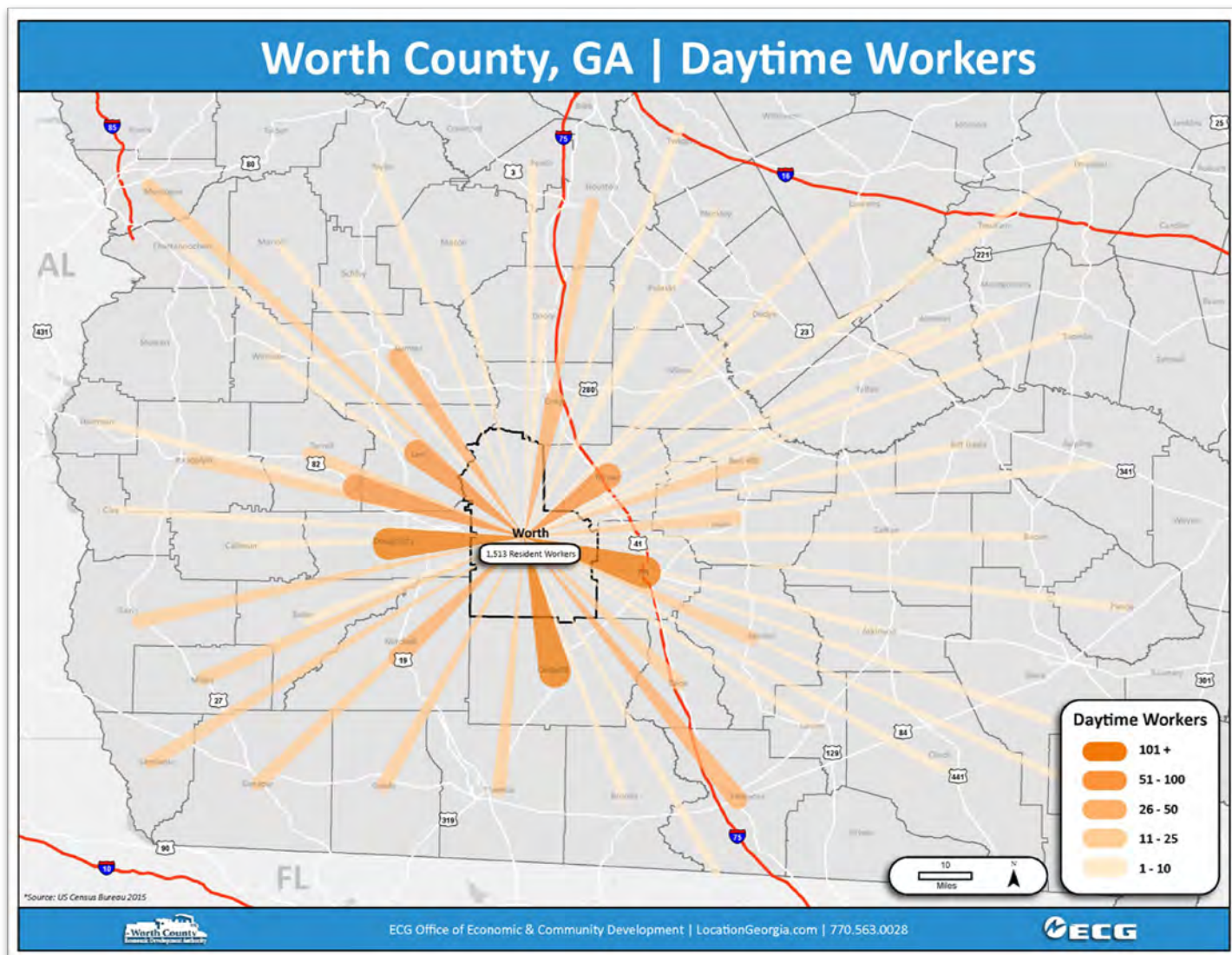
Sources: Georgia Department of Education and Worth County Schools
*Note: Please see the following page for more details.

Program	No. Enrolled	Pathways	Dual Enrollment	Industry Credentials and End-of-Pathway National Certifications Offered
Agriculture	72	Ag Leadership in Horticulture	No	Ag Science (Precision)
		Horticulture and Animal Science	No	Ag Science (Precision)
		Plant and Landscape Systems	No	Landscape Management (Precision)
Architecture and Construction	76	Carpentry	Yes	Certified Construction Worker, TCC
		Welding	Yes	1. Basic Metal Arc Welder, TCC* 2. Gas Metal Arc Welder, TCC* 3. Vertical Shielded Metal Arc Welder Fabricator, TCC*
Arts, A/V Technology and Communications	45	Animation and Digital Media	No	n/a
		Audio-Video, Technology, and Film	No	Adobe Certified Associate
Business	104	Business and Technology	No	Microsoft Office 2016 Specialist
		Entrepreneurship	No	General Management (NOCTI)
Education and Training	65	Early Childhood Education	No	Early Childhood and Basic Care (NOCTI)
		Teaching as a Profession	No	n/a
Finance	55	Financial Services	No	Financial and Investment Planning (NOCTI)
Human Services	100	Nutrition and Food Science	No	ServSafe Food Handler Certification
Government and Public Administration	154	Army JROTC	No	n/a
Health Science	145	Emergency Medical Responder	Yes	Emergency Medical Responder, TCC*
		Nurse Aide	Yes	1. Certified Nursing Assistant (CNA) 2. Nurse Aide, TCC*
		Therapeutic Services/Allied Health	No	1. FEMA Community Preparedness Certificate 2. Certified Medical Office Assistant
		Therapeutic Services/Patient Care	No	Certified Nursing Assistant (CNA)
		Therapeutic Services/Sports Medicine	No	Exercise Science/Sports Medicine (Precision)
Marketing	25	Marketing and Management	No	Standard Marketing POS/EOP HS (MBA Research)
Transportation and Logistics	38	Basic Maintenance and Light Repair	Yes	1. Auto Maintenance and Light Repair Tech, TCC* 2. ASE Heating and Air Conditioning 3. ASE Brakes 4. ASE Engine Repair

**Indicates a Technical College Certificate*

Commuter Patterns

Commuter patterns for the region indicate that Sylvester and Worth County draw their workforce from a large region. This large regional workforce provides an opportunity to attract industries that do not currently have a strong presence in Worth County but are concentrated in the surrounding region. The map below shows the counties of residence for employees who commute to Worth County for work.



Regional Top Employers

Major Employer	Location	Industry
Destiny Industries	Colquitt County	manufacturer and seller of modular and HUD homes
L & M Farms of Georgia	Colquitt County	vegetable and melon grower
National Beef	Colquitt County	meat processor
Sanderson Farms	Colquitt County	chicken processor
UFP Moultrie	Colquitt County	manufacturer of wood products (industrial packaging, treated lumber, plywood, and specialty products)
Big Tex Trailers	Crisp County	vehicle trailer manufacturing
Marvair Division of Aircel	Crisp County	specialty heating, air conditioning, and water heating products manufacturer
Norbord Georgia	Crisp County	sawmill and wood panel manufacturer
Albany State University & Darton College	Dougherty County	higher education
Coats & Clark	Dougherty County	textile manufacturer
Georgia Pacific	Dougherty County	paper products manufacturer
Marine Corps Logistics Base-Albany	Dougherty County	U.S. military
Mars Chocolate North America	Dougherty County	chocolate (M&M's) manufacturer
MillerCoors	Dougherty County	beer manufacturer
Newton Crouch	Dougherty County	agricultural tank, spreader, and sprayer manufacturer
Pfizer	Dougherty County	pharmaceutical manufacturer
Procter & Gamble	Dougherty County	paper products manufacturer
Teleperformance	Dougherty County	call center
Thrush Aircraft	Dougherty County	agricultural aircraft manufacturer
Woodgrain Millwork	Lee County	sawmill and wood products manufacturer
Phoebe Putney Health System	locations in Worth, Dougherty, and Sumter Counties	health care
Anderson Manufacturing	Mitchell County	vehicle trailer manufacturer
Darwood Manufacturing Company	Mitchell County	textile manufacturing and distribution facility
Equity Group-Georgia Division (Keystone Foods)	Mitchell County	chicken processor, hatchery, and feed mill
Sexton Farms	Mitchell County	food service transportation and logistics
Cleaver-Brooks	Thomas County	manufacturer of boiler room equipment
Flowers Foods	Thomas County	industrial bakery
American Textile Company	Tift Company	textile (bed pillows and utility bedding) manufacturer

Major Employer	Location	Industry
Heat Craft	Tift County	manufacturer of coolers, condenser units, and fluid coolers
Kelley Manufacturing	Tift County	peanut harvesting, tillage, and poultry cleanup equipment
Orgill	Tift County	retail distribution and logistics
Patrick Farms Partnership	Tift County	vegetable and melon grower
Golden Peanut Company	Turner County	peanut sheller and processor
Phoenix Wood Products	Turner County	manufacturer of wood products (pallets, crates, and lumber)
Triangle Chemical Company	Turner County	agricultural fertilizer manufacturer
UFP Ashburn	Turner County	manufacturer of wood products (custom industrial products, framing materials, custom panels for cargo trailers, finger-jointed studs, and trusses for modular and manufactured housing)
Birdsong Peanuts	Worth County	peanut sheller and processor
Coca Cola Distribution	Worth County	regional beverage distribution facility
Conagra (Peter Pan)	Worth County	peanut butter and peanut products manufacturer
Universal Blanchers / Olam Edible Nuts	Worth County	peanut processing / blanching facility

Sources: ECG Office of Economic & Community Development, Albany-Dougherty EDC, Worth County ED, Georgia Department of Labor, and D&B Hoovers.

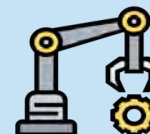
Target Industry Group No. 1: Advanced Manufacturing

What is Advanced Manufacturing? Advanced Manufacturing is the insertion of new technology, improved processes, and management methods to improve the manufacturing of products by increasing a manufacturer’s competitive edge. Many different industry sectors fall into the category of Advanced Manufacturing and they cannot be distinguished by NAICS code alone.

Sylvester-Worth Strengths

- Proximity to existing skilled regional workforce for advanced manufacturing
- Local Worth County food processing industry workforce has overlapping skills set
- Sites available for development
- Alignment with the State of Georgia’s target industry marketing efforts surrounding manufacturing

ADVANCED MANUFACTURING



Agricultural Equipment & Fertilizer Manufacturing
Packaging Material Manufacturing
Textile Manufacturing
Trailers & Related Vehicle Manufacturing

Advanced Manufacturing Industries to Target

Agricultural Equipment & Fertilizer Manufacturing: Sylvester-Worth County are in the center of South Georgia’s vast agricultural ecosystem and located near several existing agricultural equipment and fertilizer manufacturers. Newton Crouch in Albany is a manufacturer of agricultural spreaders, tanks, and sprayers. Thrush Aircraft, also in Albany, makes crop duster aircraft. Triangle Chemical in Turner County makes fertilizer chemicals. Similar advanced manufacturing companies would be a good fit for Sylvester-Worth.

Packaging Material Manufacturing: Due to the proximity to large manufacturers and logistics hubs like Southwest Georgia Regional Airport and Cordele Intermodal Center, Sylvester-Worth County may be a good location for packaging material manufacturing facilities. Several wood packaging and crate manufacturers are already located in the area, including UFP Moultrie, UFP Ashburn, and Phoenix Wood Products. Paper or cardboard packaging manufacturers would also be a good fit for the Sylvester-Worth area.

Textile Manufacturing: Sylvester-Worth is ideally situated to attract textile manufacturers similar to Coats & Clark located in Albany.

Trailers & Related Vehicle Manufacturing: With existing trailer manufacturers located with Crisp and Mitchell counties (Big Tex and Anderson, respectively), trailer manufacturing could be a good fit for Worth County due to the existing workforce and supply networks in the region.

Other Advanced Manufacturing: Sylvester-Worth County should target advanced manufacturing industries not specifically listed here if the industries match well with goals in their strategic plan and their existing workforce.

Target Industry Group No. 2: Communications

What is the Communications industry group? Communications includes a wide variety of industries that employ telecommunications tools such as high-speed internet connection and phone lines. Communications operations for which Sylvester-Worth has a strategic advantage include call centers, technical support centers, and data centers.

Sylvester-Worth Strengths

- Dedicated fiber internet connection in Sylvester via CNS with symmetric upload/download speeds ranging from 10Mbps to 10Gbps depending on specific business needs
- T1, DS3, VLAN, Dedicated Transport, SIP, and PRI services are also available via CNS in Sylvester
- Lower operating costs for communications businesses, including lower labor and overhead costs
- Sites available for development
- Alignment with the State of Georgia's target industry marketing efforts surrounding technology

COMMUNICATIONS



Call Centers
Technical Support Centers
Data Centers

Target Industry Group No. 3: Regional Distribution and Logistics

What is Regional Distribution and Logistics? Regional Distribution and Logistics consists of distribution centers and warehouses that serve a small region such as a 50 mile radius. Sylvester-Worth is ideally situated as a regional distribution hub for the South Georgia region.

Sylvester-Worth Strengths

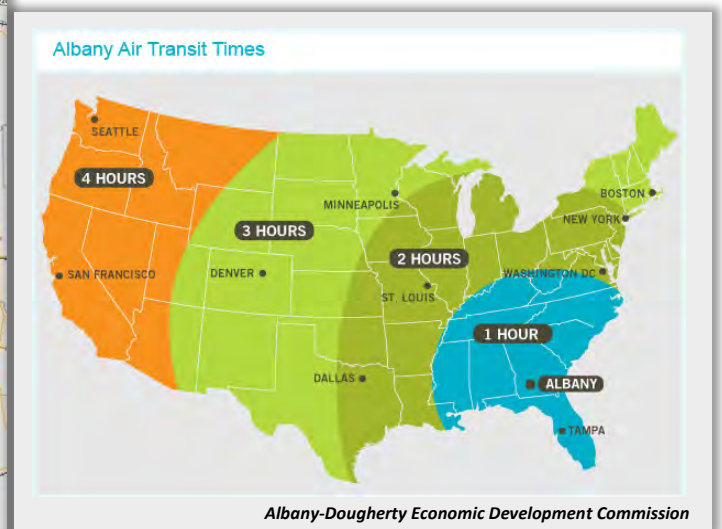
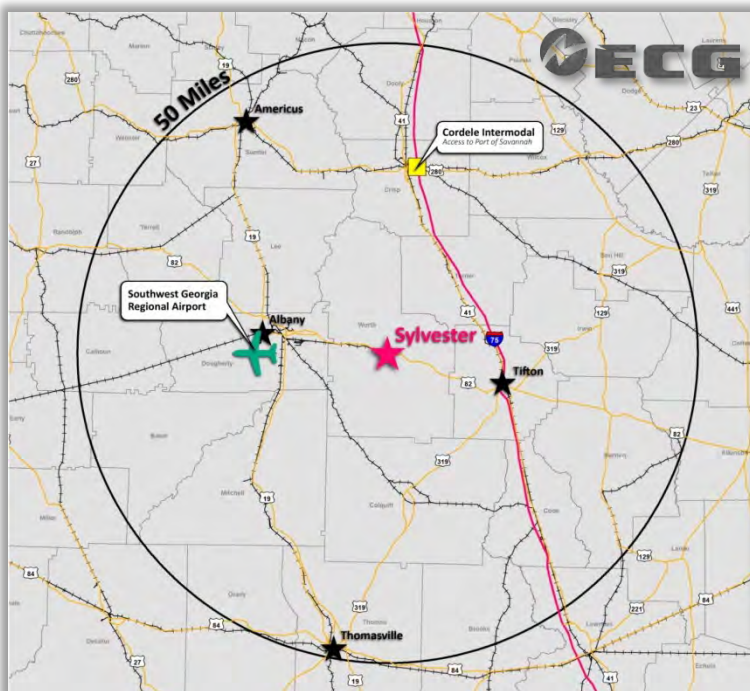
- Less than 50 miles from four major South Georgia population centers: Albany, Thomasville, Tifton, and Americus
- Existing successful Coca Cola regional distribution center in Sylvester and Sexton Farms in Camilla
- Approximately 25 miles from Cordele Intermodal Center, which has direct rail lines to the Port of Savannah
- Less than 20 miles from Interstate 75 via a four-lane divided highway
- Rail access in the county
- Approximately 20 miles from Southwest Georgia Regional Airport* in Albany, a major freight hub
- Existing manufacturing and processing industries offer an opportunity for logistics and supply chain management
- Logistics is a target industry for the State of Georgia

REGIONAL LOGISTICS



Warehousing
Regional Distribution & Trucking

**Southwest Georgia Regional Airport (ABY) in Albany is Georgia's second largest cargo airport by landed weight. The airport offers three nonstop daily flights to Hartsfield-Jackson (ATL) and has an on-site UPS sorting facility.*



Target Industry Group No. 4: Food Processing

Sylvester-Worth Strengths

- Strong industry sector employment concentration (location quotient) in the region surrounding Sylvester-Worth
- Close proximity to agriculture producers
- Sites available for development of food and beverage processing facilities
- Target industry for the State of Georgia

Existing regional Food Processing employers include:

- Conagra (Peter Pan)
- Universal Blanchers/Olam Edible Nuts
- MillerCoors (Albany)

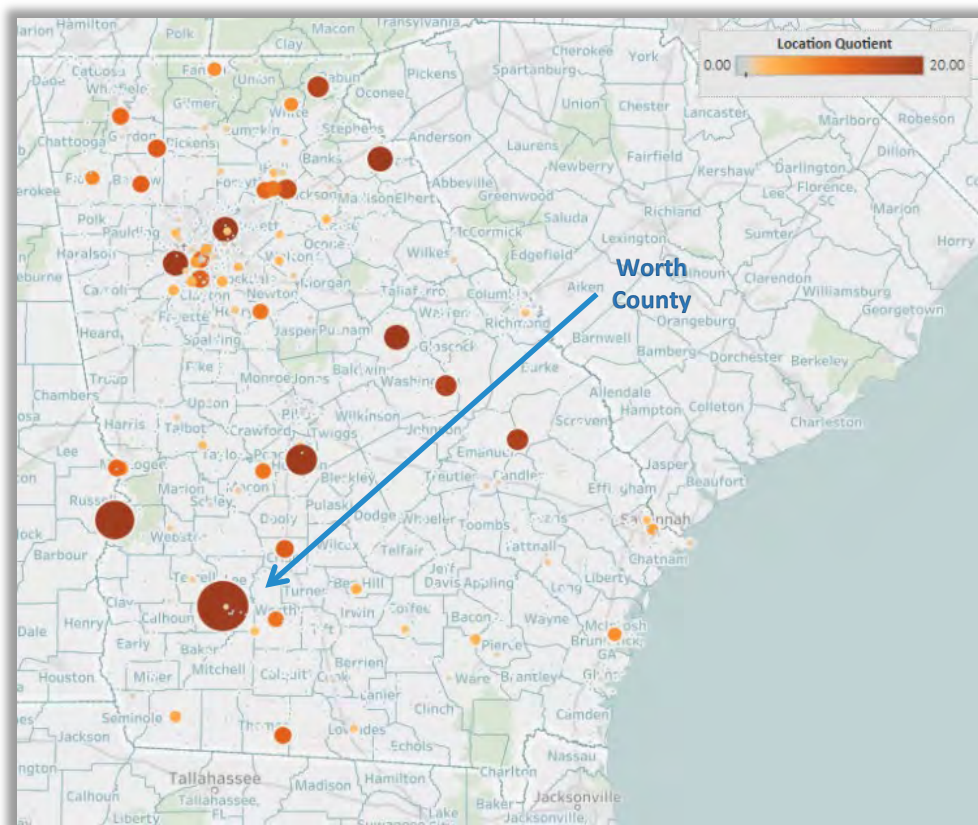
Food Processing industries include:

- NAICS 311 Food Manufacturing
- NAICS 312 Beverage and Tobacco Product Manufacturing

FOOD PROCESSING



Food Processing
Beverage Processing



Map: location quotient for food processing by zip code

Source: EMSI Q1.2019

Target Industry Group No. 5: Specialized Agriculture

What is Specialized Agriculture? Specialized Agriculture includes agricultural crops that fall into a niche market, particularly those that draw agritourism business. Examples include wineries, working farms that allow visitors, and olive groves, among others. Specialized Agriculture may be a good fit for Sylvester in order to diversify the agriculture industry and crops produced in the region and to attract additional business from tourism. Agritourism destinations would amplify the existing tourism business from Sylvester's world-renowned hunting preserves.

Sylvester-Worth Strengths

- Large regional agricultural workforce
- Located in the center of South Georgia's agricultural region
- Large producer of crops including peanuts, cotton, and others
- Proximity to food processing facilities
- Target industry for the state of Georgia (agribusiness)

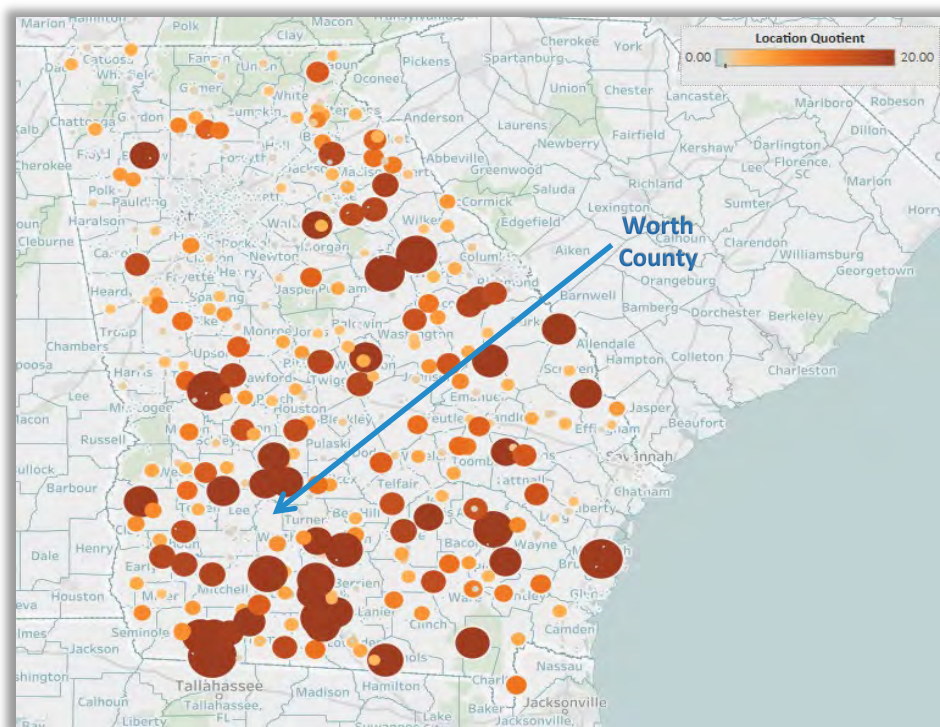
Existing regional Specialized Agriculture establishments include:

- Clay Oliver | a producer of olive and other oils | Pitts, Georgia | <https://oliverfarm.com/>
- Horse Creek Winery | winery | Nashville, Georgia | <https://horsecreekwinery.com/>

SPECIALIZED AGRICULTURE



Diversified & Niche Crop Agriculture
Agritourism



Map: location quotient for agriculture by zip code

Source: EMSI Q1.2019