

# 2022



# EXECUTIVE SUMMARY

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The Western Piedmont Industry Growth Analysis (IGA) is a way that the Western Piedmont Workforce Development Board and the Western Piedmont Council of Governments (WPCOG) assists the Western Piedmont North Carolina region (Alexander, Burke, Caldwell and Catawba Counties) to determine future economic development opportunities. This analysis is particularly important as the region continues to recover from the negative impacts caused by the COVID-19 Pandemic.

The IGA is accomplished by creating a series of industry employment and wage tables and charts. All industry sectors are then plotted into one of four zones, based on average weekly wages and national growth projections over the next 10 years. **The Industry Growth Analysis identifies the region's "most-favored" industries, which pay above the average regional wage and are expected to grow nationally over the next 10 years. The "most-favored" industries should become the focus of economic development efforts in the Western Piedmont Region.** Conversely, industries that pay below the average regional wage and/or are expected to decline over the next decade are not considered economic development targets. Sources for IGA include the 2020 Census (demographic data), the 2015-2019 American Community Survey, the US Bureau of Labor Statistics (BLS) and the North Carolina Labor and Economic Analysis Division, NC Department of Commerce.

**In addition, the IGA also reviews regional educational offerings to determine if training is available to prepare Western Piedmont residents for positions in the area's identified "most-favored" industries.** Included in the examination are degree programs from the Western Piedmont's three community colleges (Caldwell Community College and Technical Institute, Catawba Valley Community College and Western Piedmont Community College). The report also includes bachelor's and master's programs from Lenoir-Rhyne University and Appalachian State University.

In 2000, the Western Piedmont Region employed 177,588 workers (private sector only). Over the 20 years, the region's employment has declined due to multiple economic recessions, outsourcing of manufacturing jobs and the increase of e-commerce. The region was also severely impacted by the COVID-19 Pandemic during 2020. As of 2020, total Western Piedmont Employment equaled 130,057 (private sector only). On a positive note, recent data from BLS's Current Employment Statistics (CES) indicate that the Western Piedmont has recovered most of the jobs lost during 2020.

The IGA breaks down the region's industries into goods-producing and service-providing sectors. "Goods-producing" industries are comprised of businesses that generate material commodities. This category includes, but is not limited to, agriculture, construction, manufacturing, and mining. Overall, employment in goods-producing jobs has remained nearly the same (except during the first few months of the COVID-19 Pandemic) since 2016.

The Industry Growth Analysis revealed that approximately one-third of the Western Piedmont workers, as of 2020, were employed in high pay/growing goods-producing industries (most-favored). Approximately another third (35.4%) of goods-producing jobs are in growing but low-paying industries (32.3%) or shrink by 2030 (about 9% of goods-producing jobs are in low pay/shrinking with 23.3% in high pay/shrinking). The final third of jobs are growing nationally but offer pay below the regional average.

Service-providing industries include education, finance and insurance, food services, health care and wholesale/retail trade. Overall, employment in service-producing industries has grown since 2016. The IGA revealed that slightly more than one-third of the Western Piedmont workers, as of 2020, were employed in high pay/growing service-providing industries (most-favored). Approximately 20% of service-providing jobs are in industries that are expected to lose employment, or shrink by 2030 (about 16.4% of service-providing jobs are in low pay/shrinking with 3.1% in high pay/shrinking). The final 46% of jobs are growing nationally, but offer pay below the regional average.

**Of the 26 most-favored goods-producing industries identified in the Western Piedmont IGA, 21 (80.7%) have degree/certificate programs offered within the region. Of the 51 most-favored service-providing industries listed in the Western Piedmont IGA, 31 (60.7%) have degree/certificate programs offered within the region.**

# INDUSTRY GROWTH ANALYSIS (IGA) GOODS-PRODUCING INDUSTRIES

Employment can be divided into “goods-producing” and “service-providing” industries. This portion of the IGA covers goods-producing industries in the Western Piedmont Region. Goods-producing industries include agriculture, mining, construction and manufacturing (such as automobile parts, electronics, furniture, textiles, and wood products).

In 2000 the Western Piedmont employed 86,367 workers in goods-producing industries, or 46.8% of all jobs (private sector only) in the region. From 2000 to 2020, jobs in the goods-producing sector fell by almost 50% due to several economic recessions and outsourcing of thousands of manufacturing jobs overseas. In 2020, the Western Piedmont had 44,482 workers employed in goods-producing industries, or 30.3% of all jobs (private sector) in the region. Of the 44,482 goods-producing jobs in the region, 29.4% are in furniture manufacturing, 9.3% are in electronics manufacturing, 6.9% are in wood products manufacturing, 6.5% are in textile manufacturing 3.7% are in construction and less than 1% are in agriculture. The US Bureau of Labor Statistics (BLS) predicts that the region’s goods-producing sector will grow by approximately 3% between 2020 and 2030, assuming that the Western Piedmont follows national trends.

All goods-producing industries can be broken down into one or four categories: high pay/growing, high pay/shrinking, low pay/growing and low pay/shrinking. A designation of “high pay” indicates that the average weekly pay in the industry exceeds the Western Piedmont Regional average of \$849 a week. A designation of “low pay” indicates that the average weekly pay in the industry is below the Western Piedmont Regional average of \$849 a week. A designation of “growing” means that BLS predicts an increase in the number of workers in the industry from 2020 to 2030. A designation of “shrinking” means that BLS predicts a decrease in the number of workers in the industry from 2020 to 2030.

The IGA revealed that approximately one-third of the Western Piedmont workers, as of 2020, were employed in high pay/growing goods-producing industries. These jobs are additionally labeled as “most-favored,” meaning the sector is growing nationally and pays on average more than the mean weekly wage (\$849). These “most-favored” industries would become targets for future economic development in the Western Piedmont. Approximately another third of goods-producing jobs are in industries that are expected to lose employment, or shrink by 2030 (about 9% of goods-producing jobs are in low pay/shrinking with 23.3% in high pay/shrinking). The final third of jobs are growing nationally, but offer pay below the regional average.

## Analysis of Top Ten Goods-Producing Industries by Employment

The table on page 4 lists the 10 goods-producing sectors in the Western Piedmont Region which have the largest number of employees (as of 2020) and the projected change in employment from 2020 to 2030. The table also designates each of the top ten goods-producing industries in one of four IGA categories (high pay/growing, high pay/shrinking, low pay/growing and low pay/shrinking). Six of the 10 goods-producing industries with the most employees have average weekly salaries exceeding the regional average. Only three of these are expected to have job growth over the next decade (building equipment contractors; electrical equipment manufacturing-including fiber-optics and coaxial cable, motor vehicle parts manufacturing).

## Analysis of Most-Favored Goods-Producing Industries

Most-favored goods-producing industries are defined as sectors whose pay exceeds the mean weekly wage in the Western Piedmont Region (\$849) and are anticipated by BLS to experience job growth over the next decade (2020 to 2030). The IGA assigned each most-favored goods-producing industry a “score” for comparison purposes. Scores were determined by weighting the number of employees in the industry (50% of score), projected growth (33% of score) and average weekly pay (17%). Industries with higher rankings in the number of total employees, projected national growth over the next ten years (according to BLS) and average weekly pay will score closer to “100,” while industries with lower rankings will score closer to “0”. The top scores among goods-producing industries were electrical equipment and component manufacturing (score of 98), motor-vehicle parts manufacturing (score of 79) and bakeries and tortilla manufacturing (score of 76). The entire list of most-favored goods-producing industries and associated scores can be found on page 25.

## Goods-Producing Industries Ranked by Number of Employees

Rank	Industry	2020 Employment	2020 Wage	2030 Projected Change	Zone
1	Household & institutional, furniture & kitchen cabinet manufacturing	11,497	\$828	+805	Low Pay/ Growing
2	Plastics product manufacturing	3,843	\$1,100	-231	High Pay/ Shrinking
3	Other electrical equipment & component manufacturing	3,721	\$1,318	+447	High Pay/ Growing
4	Converted paper product manufacturing	2,147	\$1,194	-236	High Pay/ Shrinking
5	Motor vehicle parts manufacturing	1,647	\$1,034	+82	High Pay/ Growing
6	Building equipment contractors	1,579	\$909	+63	High Pay/ Growing
7	Office furniture (including fixtures) manufacturing	1,574	\$690	-16	Low Pay/ Shrinking
8	Fabric mills	1,241	\$864	-199	High Pay/ Shrinking
9	Other wood product manufacturing	743	\$825	+22	Low Pay/ Growing
10	Textile & fabric finishing	715	\$760	-114	Low Pay/ Shrinking

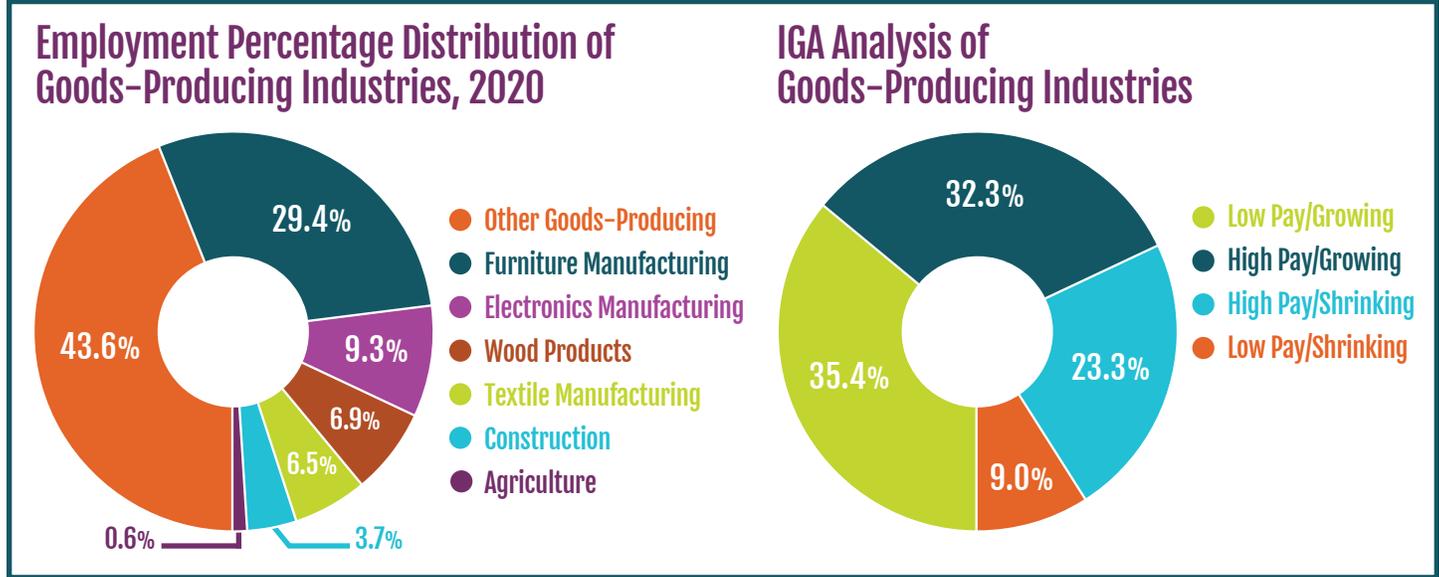
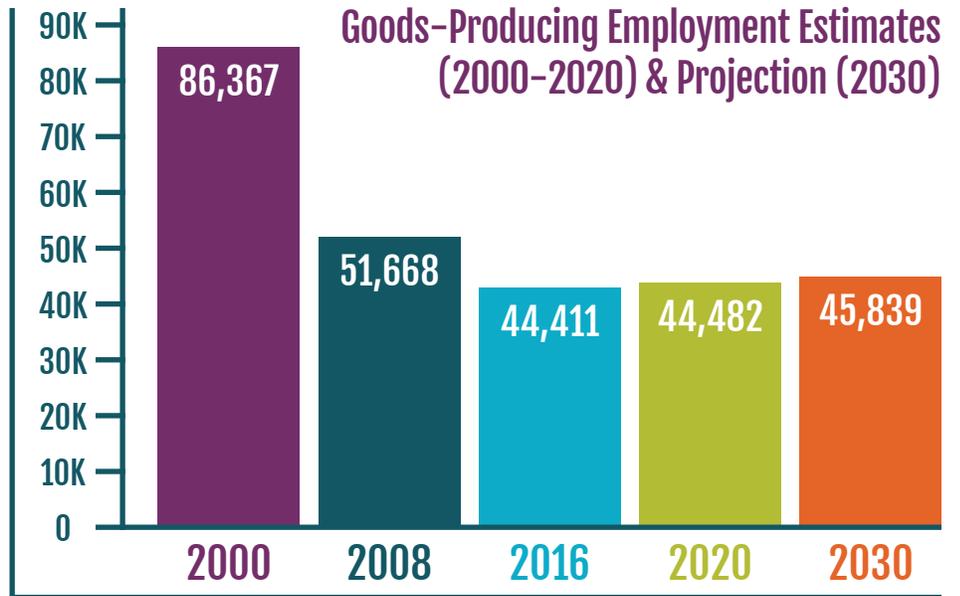
\*A listing of all goods-producing sectors with employment in the Hickory Metro can be found in Table 12 in Appendix B, beginning on page 125.

## Top 10 Most-Favored Goods-Producing Industries by Index Sector

Rank	Industry	Employment Rank	Wage Rank	Growth Rank	Score
1	Other electrical equipment & component manufacturing	1	4	1	98
2	Motor vehicle parts manufacturing	2	13	10	79
3	Bakers & tortilla manufacturing	7	10	6	76
4	Glass & glass product manufacturing	12	7	4	71
5	Nonresidential building construction	6	8	13	71
6	Communications equipment manufacturing	13	2	8	67
7	Residential building construction	4	17	15	66
8	Resin, synthetic rubber, & artificial & synthetic fibers & filaments manufacturing	14	15	2	65
9	Utility system construction	11	5	12	64
10	Building equipment contractors	3	22	17	62

# Goods-Producing Industries Overview

This section of the IGA provides a closer examination of seven goods-producing industries that are prominent in the Western Piedmont, including, for example, "Furniture Manufacturing" and "Construction." Industry growth estimates and projections are provided by the U.S. Bureau of Labor Statistics (BLS). Projected Western Piedmont employment is calculated by applying BLS percentage projections from 2020 through 2030 to the number of regional workers. Also included in the overview is a table all goods-producing industries that achieved most-favored industry status. The table includes NAICS codes, 2020 regional employment estimates, average weekly wage, projected growth rates through 2030, and most-favored industry score. The goods-producing sectors with the highest industry scores appear at the top of the table.

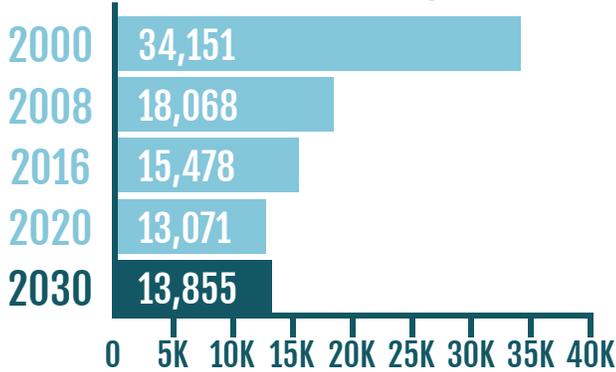




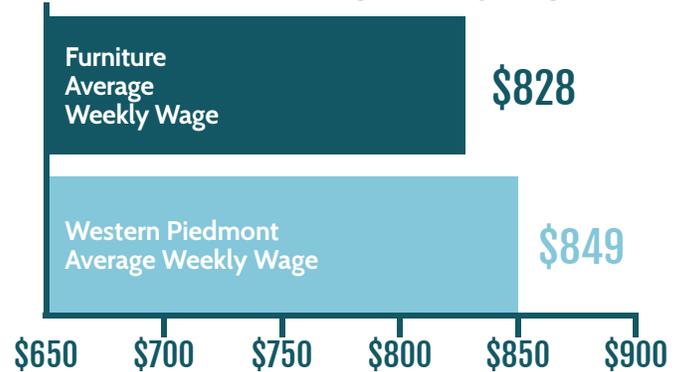
## FURNITURE MANUFACTURING

The Western Piedmont's furniture manufacturing industry employed 13,071 in 2020. Despite a heavy job loss in the early 2000s (-21,080-59.4% decline), furniture manufacturing remains the largest goods-producing employer in the Western Piedmont. The industry accounts for 29.4% of all goods-producing jobs. In 2020, furniture manufacturing employed 2,041 workers in Alexander County, 1,218 workers in Burke County, 1,750 workers in Caldwell County and 8,062 workers in Catawba County. Employment in the furniture industry is predicted by the Bureau of Labor Statistics to grow by 784 jobs (6%) from 2020 to 2030, assuming that it follows national trends. The weekly wage for the furniture industry in 2020 was \$828 per week, which is slightly below the average regional wage of \$849.

**Furniture Manufacturing Employment Estimates (2000-2020) & Projection (2030)**



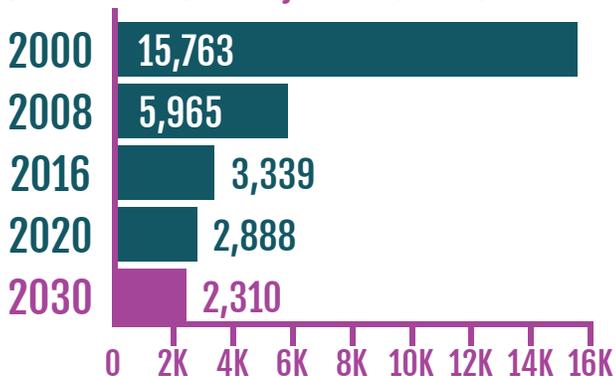
**Furniture Manufacturing vs. Western Piedmont Average Weekly Wage, 2020**



## TEXTILE MANUFACTURING

Following a loss of 13,453 (-85.3%) positions since 2000, textile manufacturing in the Western Piedmont region industry employed just 2,888 workers in 2020. During the same time period, average pay in the industry rose slightly to \$771 per week, but remains below the region average. The pie graph below shows the 2020 breakdown of textile manufacturing employment by sector. Textile manufacturing is projected by BLS to decline slightly over the next 10 years.

**Textile Manufacturing Employment Estimates (2000-2020) & Projection (2030)**



**Textile Manufacturing vs. Western Piedmont Average Weekly Wage, 2020**

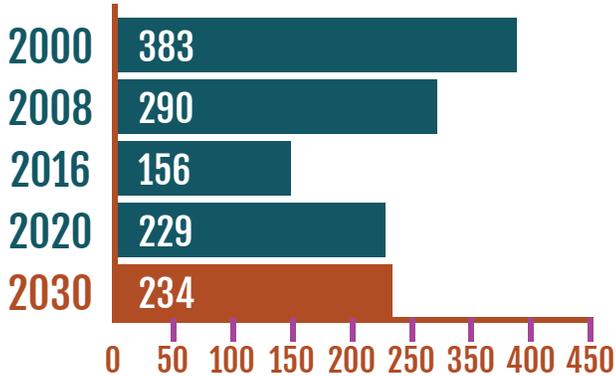




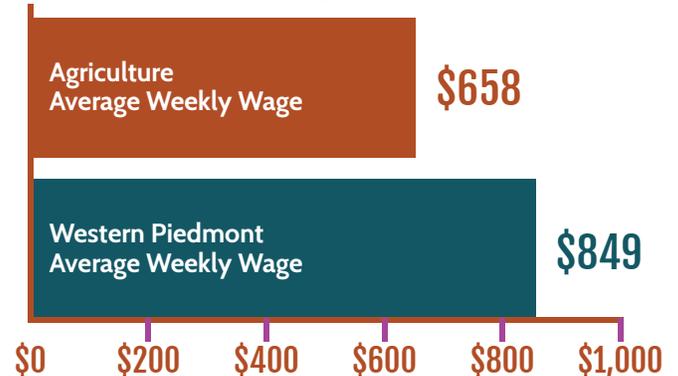
# AGRICULTURE

In terms of total employment, agriculture (includes tree and plant cultivation and animal production) is a small industry in the region, employing only 229 persons, or 0.6% of the goods-producing workforce. The number of agricultural workers is expected to remain fairly constant through 2030. Even though wages in the industry have risen in recent years (from \$500/week in 2000 to \$658/week in 2020) average salaries in the industry remain well below (77.5%) the regional average. It is important to note that employment and wage data alone do not fully express the economic impact of agriculture in the Western Piedmont region. Employment and wage data alone, however, fail to convey the full significance of agricultural production on the Hickory Metro economy, in part because many farmers who engage in commercial activity do not list agriculture as an occupation. Aside from employment, therefore, it is worthwhile to consider the value of agricultural product creation in the region. In 2020, agriculture in the region generated over \$383 million of economic impact for the region.

## Agriculture Employment Estimates (2000–2020) & Projection (2030)



## Agriculture vs. Western Piedmont Average Weekly Wage, 2020



## County Agriculture Sales (\$), 2020

Alexander	\$176,342,000
Burke	\$77,281,000
Caldwell	\$48,055,000
Catawba	\$81,466,000
<b>Western Piedmont Region</b>	<b>\$383,144,000</b>

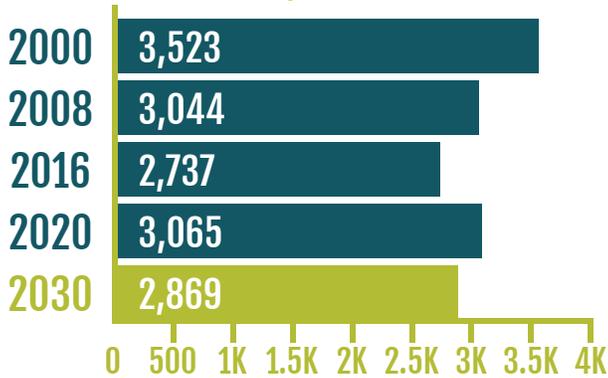




## WOOD & PAPER PRODUCTS

Wood and Paper Products is a significant source of employment in the Western Piedmont region. In 2020, the industry included 3,065 positions, representing 7.9% of all goods-producing jobs in the region. Since 2000, employment in wood and paper products have remained relatively steady. The 2030 projection of 2,869 workers is only about 200 less than 2020. The average salary in the industry was \$1,078 per week in 2020, which is well above the average regional weekly salary.

### Wood & Paper Products Employment Estimates (2000–2020) & Projection (2030)



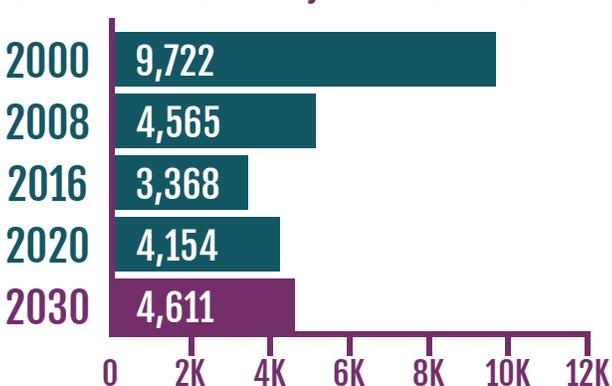
### Wood & Paper Products vs. Western Piedmont Average Weekly Wage, 2020



## ELECTRONICS WIRING & COMMUNICATIONS EQUIPMENT MANUFACTURING

The electronics, wiring, and communications equipment manufacturing industry employed 4,154 workers as of 2020. Two economic recessions caused significant employment losses in the industry between 2000 and 2008. Since 2016, the number of jobs in the industry have bounced back to 2008 levels. A slight growth is projected by BLS in the industry over the next 10 years. Workers in the sector earned an average weekly wage of \$1,365 a week in 2020, which is well above the weekly average pay (\$849).

### Electronics, Wiring & Communications Equipment Employment Estimates (2000–2020) & Projection (2030)



### Electronics, Wiring & Communications Equipment Manufacturing vs. Western Piedmont Average Weekly Wage, 2020

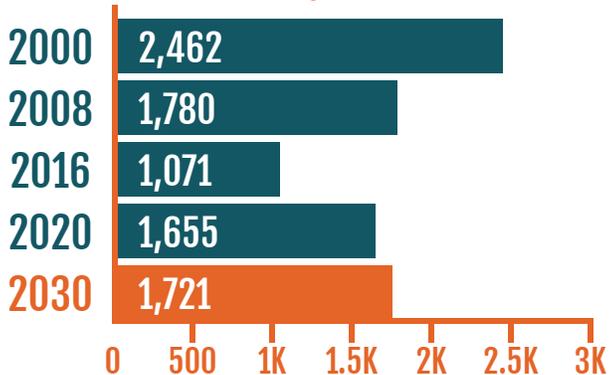




# CONSTRUCTION

The number of construction workers increased by 584 workers between 2016 and 2020 in conjunction with growth in residential construction in the Western Piedmont. As of 2020, construction employed 1,655 workers in the region. This number is expected to increase slightly (4%) by 2030, largely due to continued growth in residential and nonresidential development that is anticipated to occur regionally over the next decade. Salary in construction averaged \$1,058 per week in 2020 (well above the regional average).

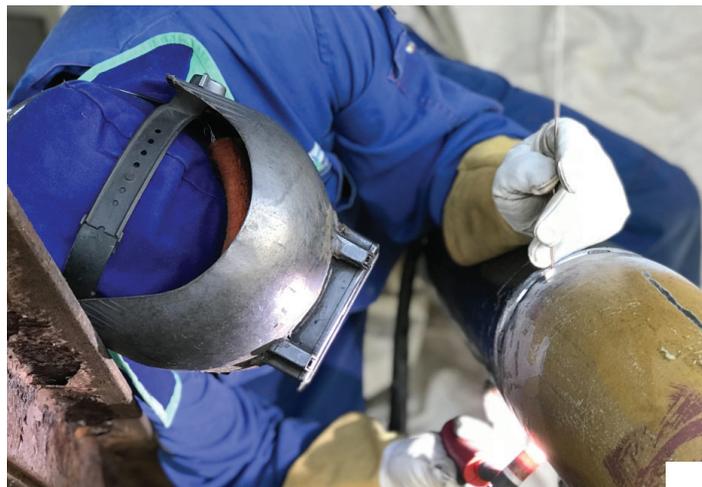
## Construction Employment Estimates (2000-2020) & Projection (2030)

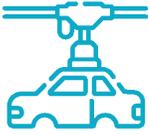


## Construction vs. Western Piedmont Average Weekly Wage, 2020



## Western Piedmont New Site Built Single-Family Permits, 2016-2020

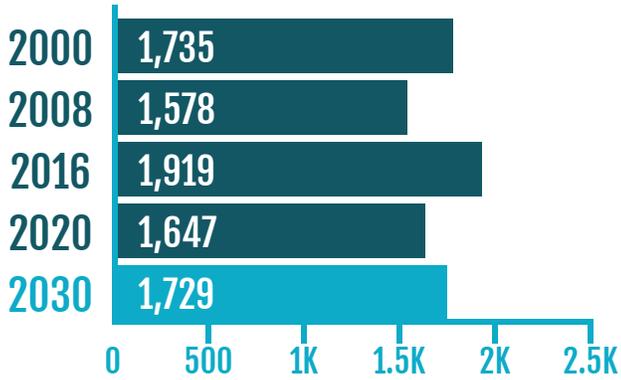




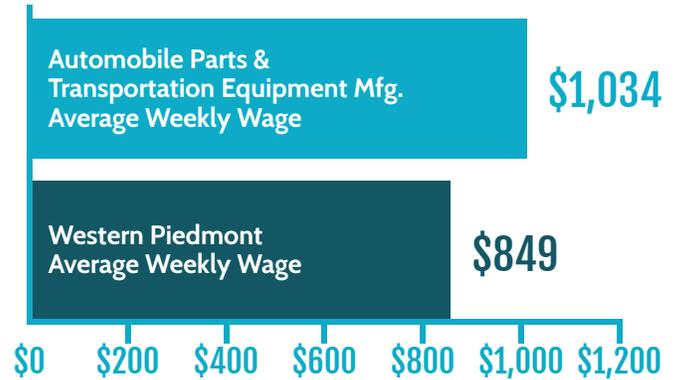
# AUTOMOBILE PARTS & TRANSPORTATION EQUIPMENT MANUFACTURING

The automobile parts and transportation equipment manufacturing sector in the Western Piedmont employed 1,647 in 2020. Workers earned an average of \$1,034 per week (122% of the regional average). A slight increase in workers is expected through 2030, according to the US Bureau of Labor Statistics. There is a possibility that the region may grow this sector more quickly than the national average over the next decade.

## Automobile Parts & Transportation Equipment Mfg. Employment Estimates (2000-2020) & Projection (2030)



## Automobile Parts & Transportation Equipment Mfg. vs. Western Piedmont Average Weekly Wage, 2020



## INDUSTRY GROWTH ANALYSIS (IGA) SERVICE-PROVIDING INDUSTRIES

Employment can be divided into “goods-producing” and “service-providing” industries. This portion of the IGA covers goods-producing industries in the Western Piedmont Region. Service-providing industries include education, finance and insurance, food services, health care and wholesale/retail trade.

In 2000 the Western Piedmont employed 91,221 workers in service-providing industries (private sector only), or 53.2% of all jobs (private sector) in the region. From 2000 to 2020, jobs in the service-providing sector fell by more than 6% due to several economic recessions and e-commerce. In 2020, the Western Piedmont had 85,575 workers (private sector only) employed in service-providing industries, or 69.7% of all jobs (private sector) in the region. Of the 85,575 service-providing jobs in the region, 20.0% are in retail trade, 19.8% are in health care (ambulatory and long-term combined), 12.3% are in food services, 10.3% are in education and 7.3% are in wholesale trade. The US Bureau of Labor Statistics (BLS) predicts that the region’s service-providing sector will grow by approximately 9% between 2020 and 2030, assuming that the Western Piedmont follows national trends.

All service-providing industries can be broken down into one or four categories: high pay/growing, high pay/shrinking, low pay/growing and low pay/shrinking. A designation of “high pay” indicates that the average weekly pay in the industry exceeds the Western Piedmont Regional average of \$849 a week. A designation of “low pay” indicates that the average weekly pay in the industry is below the Western Piedmont Regional average of \$849 a week. A designation of “growing” means that BLS predicts an increase in the number of workers in the industry from 2020 to 2030. A designation of “shrinking” means that BLS predicts a decrease in the number of workers in the industry from 2020 to 2030.

The IGA revealed that slightly more than one-third of the Western Piedmont workers, as of 2020, were employed in high pay/growing service-providing industries. These jobs are additionally labeled as “most-favored,” meaning the sector is growing nationally and pays on average more than the mean weekly wage (\$849). These “most-favored” industries would become targets for future economic development in the Western Piedmont. Approximately 20% of service-providing jobs are in industries that are expected to lose employment, or shrink by 2030 (about 16.4% of service-providing jobs are in low pay/shrinking with 3% in high pay/shrinking). The final 46% of jobs are growing nationally, but offer pay below the regional average.

### Analysis of Top Ten Service-Providing Industries by Employment

The table below lists the 10 service-providing sectors in the Western Piedmont Region which have the largest number of employees (as of 2020) and the projected change in employment from 2020 to 2030. The table also designates each of the top ten service-providing industries in one of four IGA categories (high pay/growing, high pay/shrinking, low pay/growing and low pay/shrinking). Five of the 10 service-providing industries with the most employees have average weekly salaries exceeding the regional average. All five are expected to have job growth over the next decade (general medical and surgical hospitals; office physicians; grocery and related product merchant wholesalers; general freight trucking and psychiatric and substance abuse hospitals).

### Analysis of Most-Favored Service-Providing Industries

Most-favored service-providing industries are defined as sectors whose pay exceeds the mean weekly wage in the Western Piedmont Region (\$849) and are anticipated by BLS to experience job growth over the next decade (2020 to 2030). The IGA assigned each most-favored service-providing industry a “score” for comparison purposes. Scores were determined by weighting the number of employees in the industry (50% of score), projected growth (33% of score) and average weekly pay (17%). Industries with higher rankings in the number of total employees, projected national growth over the next ten years (according to BLS) and average weekly pay will score closer to “100,” while industries with lower rankings will score closer to “0”. The top scores among service-providing industries were offices of physicians (score of 88), management, technical and consulting services (score of 83) and general medical and surgical hospitals (score of 79).

## Service-Producing Industries Ranked by Number of Employees

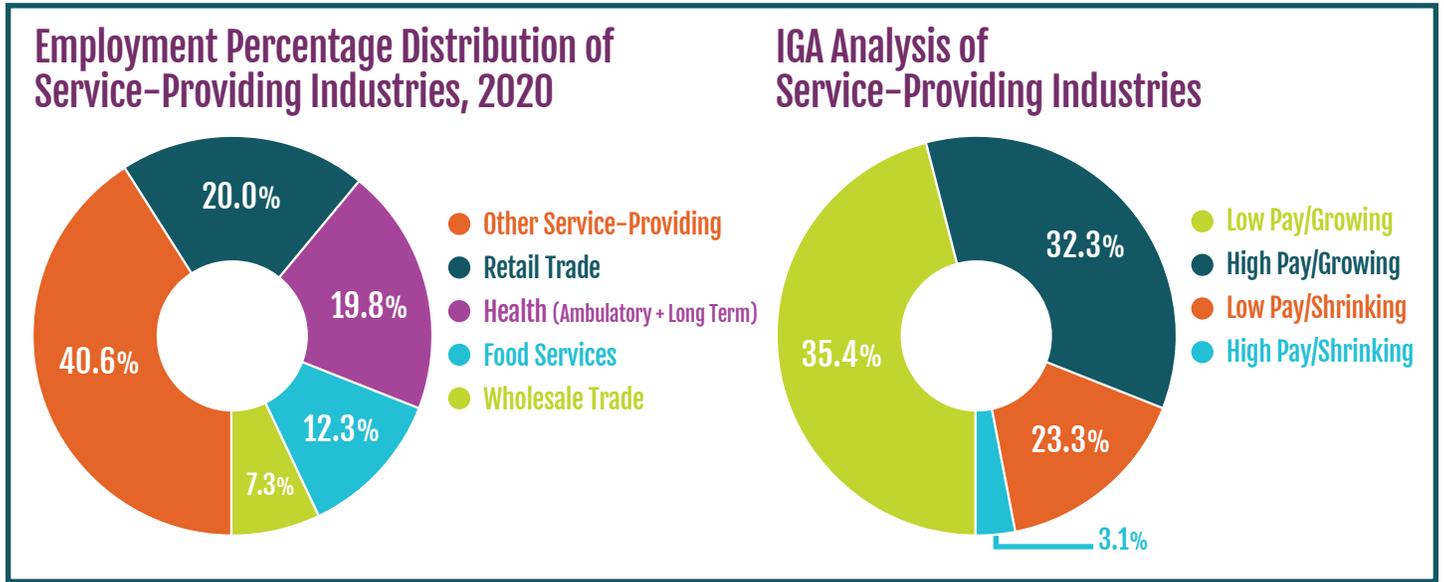
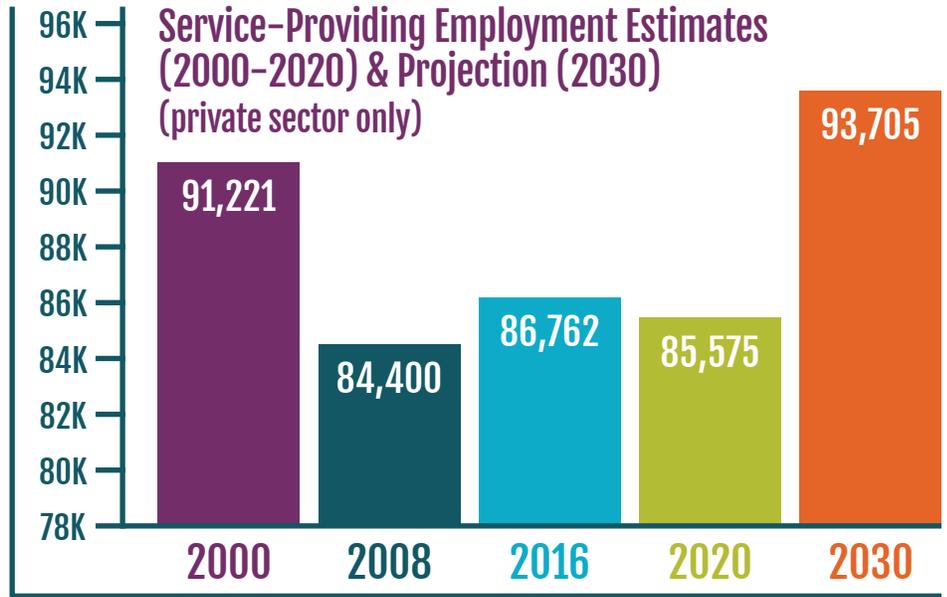
Rank	Industry	2020 Employment	2020 Wage	2030 Projected Change	Zone
1	Restaurants & other eating places	9,902	\$302	+1,980	Low Pay/ Growing
2	Elementary & secondary Schools	7,074	\$832	+778	Low Pay/ Growing
3	General medical & surgical hospitals	5,050	\$1,059	+455	High Pay/ Growing
4	Offices of physicians	3,131	\$1,824	+313	High Pay/ Growing
5	General merchandise stores, including warehouse clubs & supercenters	2,971	\$476	-238	Low Pay/ Shrinking
6	Grocery stores	2,506	\$377	-226	Low Pay/ Shrinking
7	Grocery & related product merchant wholesalers	2,474	\$1,264	+49	High Pay/ Growing
8	General freight trucking	2,414	\$1,003	+97	High Pay/ Growing
9	Psychiatric & substance abuse hospitals	2,384	\$977	+215	High Pay/ Growing
10	Home health care services	1,893	\$705	+416	Low Pay/ Growing

## Top 10 Most-Favored Service-Producing Industries by Index Sector

Rank	Industry	Employment Rank	Wage Rank	Growth Rank	Score
1	Offices of physicians	2	4	17	88
2	Management, scientific, & technical consulting services	11	10	8	83
3	General medical & surgical hospitals	1	28	20	79
4	Computer systems design & related services	10	35	6	78
5	Offices of dentists	8	29	19	74
6	Offices of other health practitioners	13	43	5	73
7	Psychiatric & substance abuse hospitals	5	38	21	71
8	Outpatient care centers	9	51	10	71
9	Office administrative services	24	8	11	70
10	Automobile dealers	7	21	28	69

# Service-Providing Industries Overview

This section of the IGA provides a closer examination of nine service-providing industries that are prominent in the Western Piedmont, including, for example, “Ambulatory Health Care” and “Retail Trade.” Industry growth estimates and projections are provided by the U.S. Bureau of Labor Statistics (BLS). Projected Western Piedmont employment is calculated by applying BLS percentage projections from 2020 through 2030 to the number of regional workers. Also included in the overview is a table all service-providing industries that achieved most-favored industry status. The table includes NAICS codes, 2020 regional employment estimates, average weekly wage, projected growth rates through 2030, and most-favored industry score. The service-providing sectors with the highest industry scores appear at the top of the table. The entire list of most-favored service-providing industries and associated scores can be found on page 21.

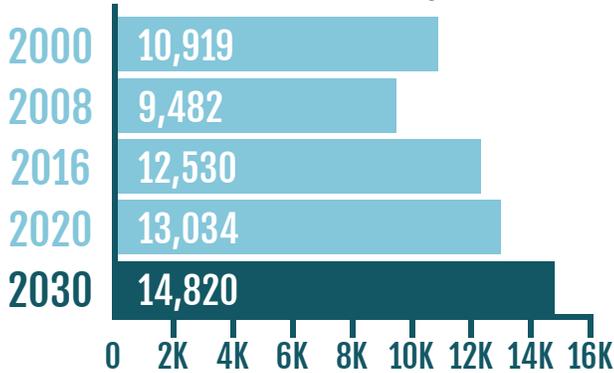




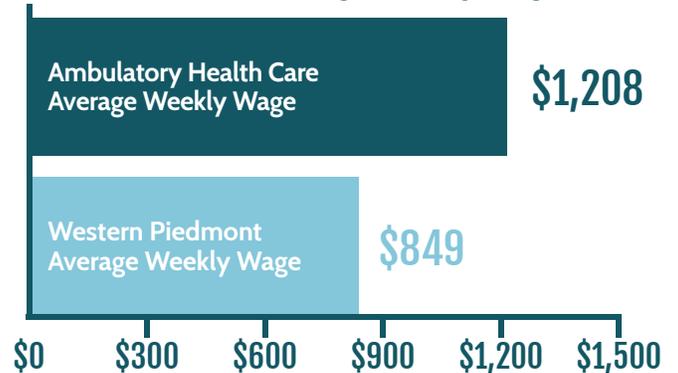
## AMBULATORY HEALTH CARE

Ambulatory health care consists of doctor and dentist offices, medical labs, out-patient services, hospitals and mental health centers. In 2020 ambulatory health care employed 13,034 workers (15.2% of the service-providing workforce). From 2008 to 2020, employment in ambulatory health care grew 37.5%. The US Bureau of Labor Statistics projects continued growth in the field to 14,820 workers in 2030. Salary in ambulatory health care averaged \$1,208 per week in 2020, which is well above the Western Piedmont regional weekly salary (\$849 a week).

### Ambulatory Health Care Employment Estimates (2000–2020) & Projection (2030)



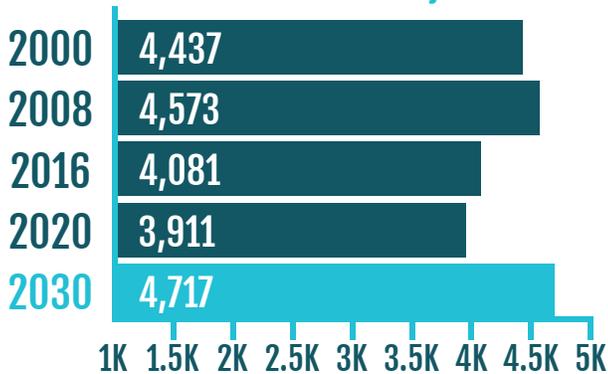
### Ambulatory Health Care vs. Western Piedmont Average Weekly Wage, 2020



## LONG-TERM HEALTH CARE

Long-term health care includes nursing homes, assisted living facilities and home health care. As of 2020, the Western Piedmont had 3,911 jobs in long-term health care. Employment in this sector decreased 14.5% between 2008 and 2020. However, the Bureau of Labor Statistics predicts an increase to 4,717 workers in 2030, exceeding the number of workers in the field in 2000. Much of the predicted increase can be attributed to growth in the region's elderly population. While wages in long-term health care have increased substantially (31.7%) since 2013, the salary remains well below the Western Piedmont regional average. In 2020, long-term health care employees earned an average of only \$640 per week.

### Long-Term Health Care Employment Estimates (2000–2020) & Projection (2030)



### Long-Term Health Care vs. Western Piedmont Average Weekly Wage, 2020

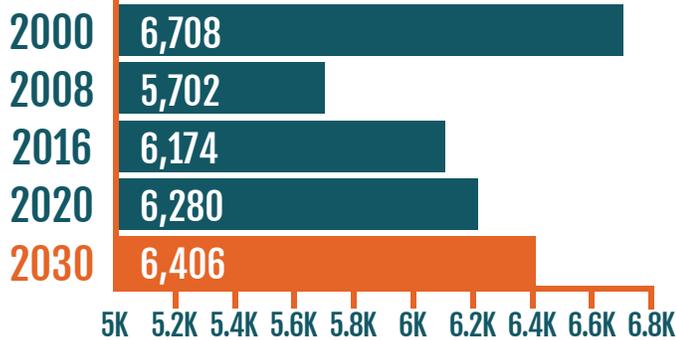




## WHOLESALE TRADE

Long-term health care includes nursing homes, assisted living facilities and home health care. As of 2020, the Western Piedmont had 3,911 jobs in long-term health care. Employment in this sector decreased 14.5% between 2008 and 2020. However, the Bureau of Labor Statistics predicts an increase to 4,717 workers in 2030, exceeding the number of workers in the field in 2000. Much of the predicted increase can be attributed to growth in the region's elderly population. While wages in long-term health care have increased substantially (31.7%) since 2013, the salary remains well below the Western Piedmont regional average. In 2020, long-term health care employees earned an average of only \$640 per week.

### Wholesale Trade Employment Estimates (2000–2020) & Projection (2030)



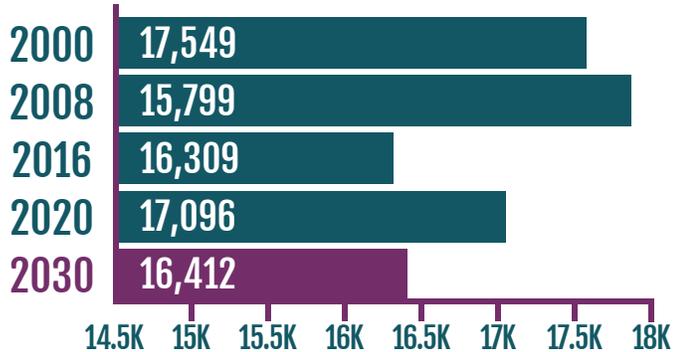
### Wholesale Trade vs. Western Piedmont Average Weekly Wage, 2020



## RETAIL TRADE

Wholesale trade consists of purchasing and selling of goods directly to retailers, industrial or commercial businesses or intermediaries, as opposed to individual (household) consumers. Wholesale trade in 2020 accounted for 6,280 jobs in the Western Piedmont region. The number of jobs in wholesale trade have remained relatively stable since 2000. Workers in wholesale trade made an average of \$1,198 a week (141% of the Western Piedmont regional average). By 2030, wholesale trade is predicted to grow a modest 2% to 6,406 workers.

### Retail Trade Employment Estimates (2000–2020) & Projection (2030)



### Retail Trade vs. Western Piedmont Average Weekly Wage, 2020



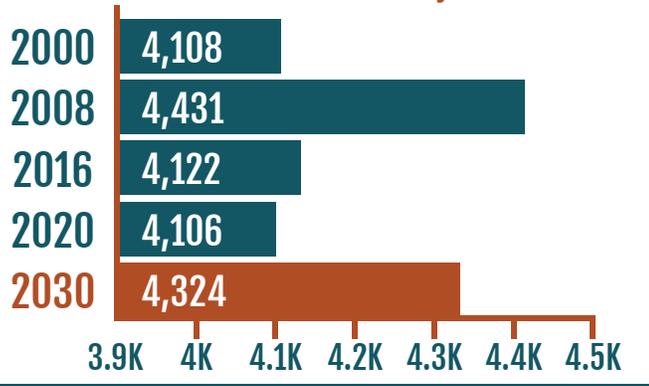


## TRUCKING & WAREHOUSING

The Western Piedmont region's strong manufacturing base is directly connected to a significant amount of warehousing and trucking of products to other regions across the United States. Workers in this sector earn an average weekly salary of \$930 a week, which is above the regional average of \$849 a week.

The number of jobs in the trucking and warehousing sector has remained essentially unchanged in the Western Piedmont region since 2000. One interesting note is that the large distribution centers added in the Western Piedmont region over the past decade have increased the number of warehouse jobs, while the number of trucking jobs have declined. It should also be noted that companies are currently struggling to find trucking and warehousing workers. The Bureau of Labor Statistics predicts an increase of 5.3% by 2030, assuming additional workers can be found.

### Trucking & Warehousing Employment Estimates (2000-2020) & Projection (2030)



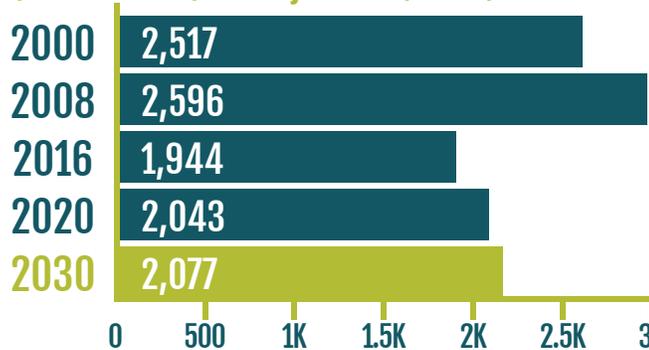
### Trucking & Warehousing vs. Western Piedmont Average Weekly Wage, 2020



## FINANCE & INSURANCE

Finance and insurance, which includes banks, credit unions, brokerage houses and insurance firms, employed 2,043 workers in the Western Piedmont region in 2020. This number is expected to grow slightly (1.6%) by 2030, if the region follows national trends. The 2030 estimated number of jobs in finance and insurance (2,077) is still much lower than the number of finance and insurance positions in 2008 (2,596). Jobs in finance and insurance tend to have high wages. In 2020, the average weekly salary was \$1,190 per week, which is well above the regional average (140.2%).

### Finance & Insurance Employment Estimates (2000-2020) & Projection (2030)



### Finance & Insurance vs. Western Piedmont Average Weekly Wage, 2020

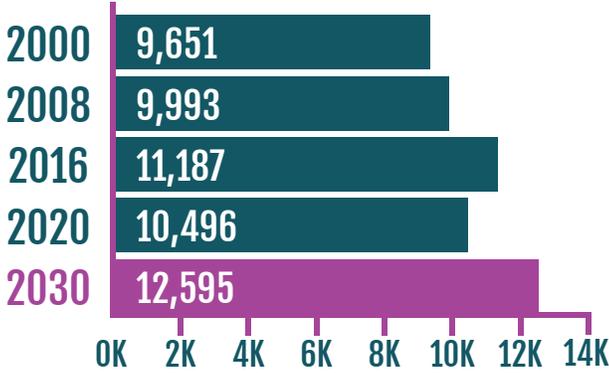




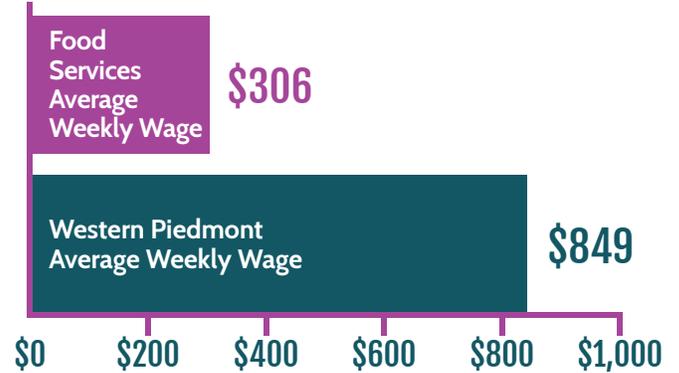
# FOOD SERVICES

In 2020, there were 10,496 people employed in food services in the Western Piedmont. This number is expected to grow to 12,595 workers in 2030, as the region's residents continue to dine or order out more frequently. Although anticipating rapid growth, wages in this sector tend to be low. In 2020, the average weekly salary in food services was only \$306 per week (about one-third of the regional average). Similar to retail trade, many of the positions in the sector are part-time jobs. It should also be noted that the wage data may be missing "tips" given to servers.

## Food Services Employment Estimates (2000–2020) & Projection (2030)



## Food Services vs. Western Piedmont Average Weekly Wage, 2020

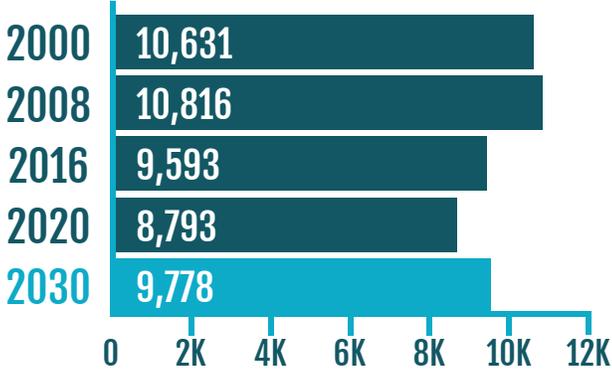




# EDUCATION SERVICES

Education services in the Western Piedmont region employed 8,793 workers as of 2020 (includes private and public sector). Average wages in 2020 were \$793 per week (slightly below the regional average). The number of jobs in this sector has decreased by \$1,838 since 2000, fueled mainly by decreases in State funding and declining student enrollment. While BLS predicts an 11.2% growth in education service jobs by 2030, this trend appears to be unlikely in the Western Piedmont region unless there is significant growth in student enrollments over the next decade.

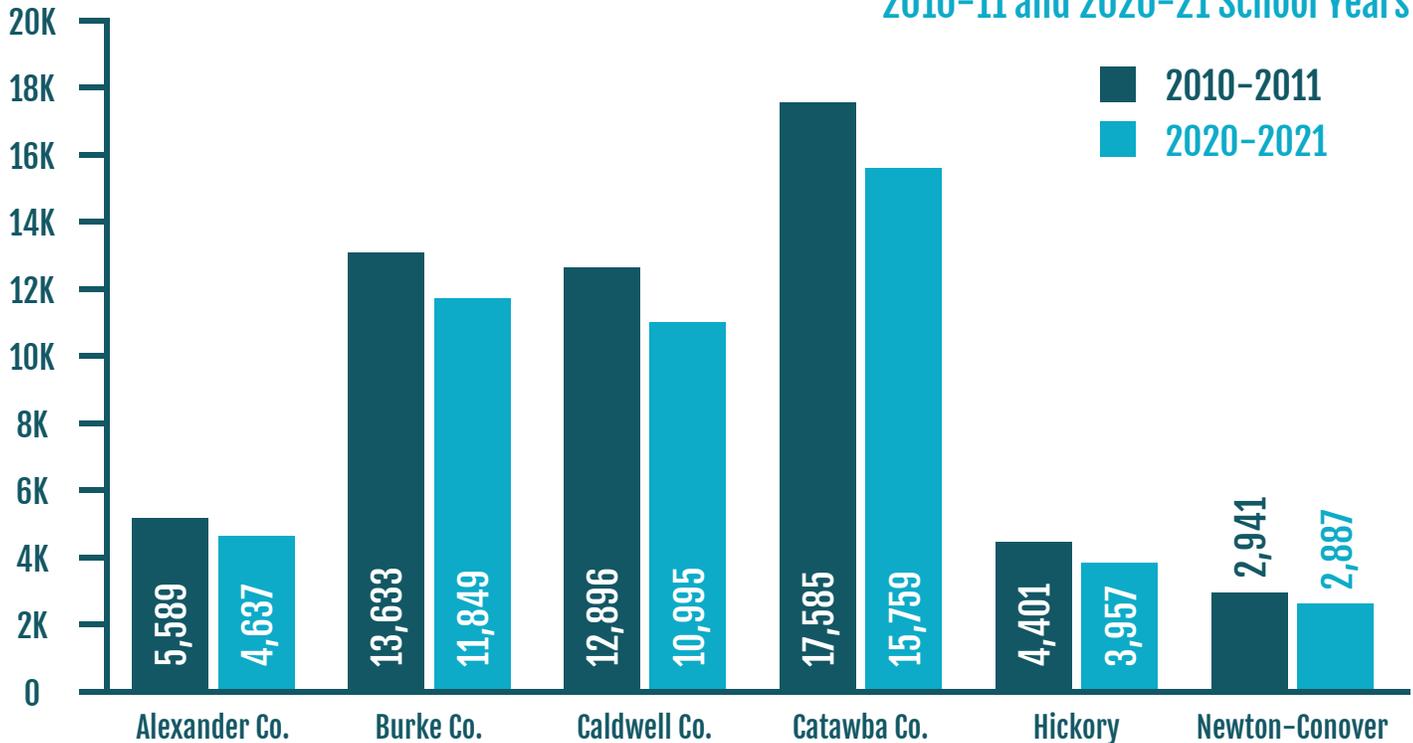
**Education Services Employment Estimates (2000–2020) & Projection (2030)**



**Education Services vs. Western Piedmont Average Weekly Wage, 2020**



**Western Piedmont Final Month Student Enrollment by School System, 2010–11 and 2020–21 School Years**

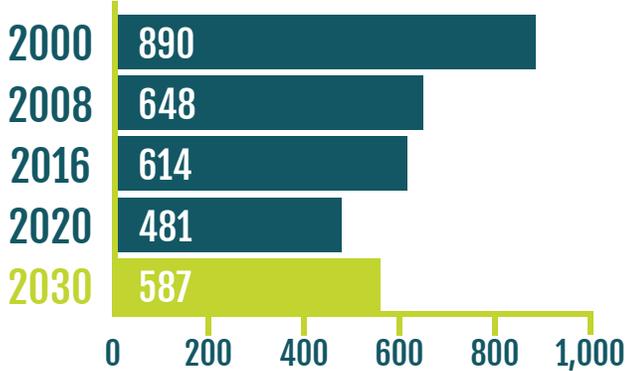




# ACCOMMODATIONS

In 2020, there were 481 workers in the accommodation industry, which includes hotels, motels, bed and breakfasts and RV parks. Since 2000, there has been a steady decline in accommodation jobs. However, BLS predicts 22% growth in the sector by 2030. There is some evidence of this trend already occurring in the Western Piedmont, with new hotels opening recently in Hickory, Morganton and Lenoir, as well as growth in regional camping options. Wages in accommodations remain low. In 2020, workers earned less than half of the regional average (only \$374 a week).

### Accommodations Employment Estimates (2000–2020) & Projection (2030)



### Accommodations vs. Western Piedmont Average Weekly Wage, 2020



## Analysis of Educational Offerings for Most-Favored Industries

The final section of the IGA reviews regional educational offerings to determine if training is available to prepare Western Piedmont residents for positions in the area's identified "most-favored" industries. Included in the examination are degree programs from the Western Piedmont's three community colleges (Caldwell Community College and Technical Institute, Catawba Valley Community College and Western Piedmont Community College). The report also includes bachelor's and master's programs from Lenoir-Rhyne University and Appalachian State University.

Of the 26 most-favored goods-producing industries identified in the Western Piedmont IGA, 21 (80.7%) have degree/certificate programs offered within the region. This includes eight of the top 10 highest scoring goods-producing industries revealed in the analysis. Some of these industries are electrical equipment and competent manufacturing, motor vehicle parts manufacturing, residential building construction and utility system construction.

Of the 51 most-favored service-providing industries listed in the Western Piedmont IGA, 31 (60.7%) have degree/certificate programs offered within the region. This includes nine of the top 10 highest scoring service-providing industries revealed in the analysis. Some of these industries are computer system design and related services; management, scientific and technical consulting services; offices of physicians; and out-patient care centers and psychiatric and substance abuse hospitals. Tables with the complete list of most-favored service-providing and goods-producing industries and educational offerings can be found below through page 26.

The complete list of community college and university programs in the Western Piedmont can be viewed in Higher Education Programs index.

### Most Favored Service-Providing Industries

Rank	Industry	Average Employment	Average Weekly Wage	Growth Rate	Score
1	Offices of physicians	3,131	\$1,824.00	10%	88
2	Management, scientific, & technical consulting services	683	\$1,402.00	20%	83
3	General medical & surgical hospitals	5,050	\$1,059.00	9%	79
4	Computer systems design & related services	705	\$995.00	21%	78
5	Offices of dentists	844	\$1,041.00	10%	74
6	Offices of other health practitioners	647	\$961.00	25%	73
7	Psychiatric & substance abuse hospitals	2,384	\$977.00	9%	71
8	Outpatient care centers	708	\$878.00	20%	71
9	Office administrative services	254	\$1,467.00	17%	70
10	Automobile dealers	1,411	\$1,159.00	4%	69
11	General freight trucking	2,414	\$1,003.00	4%	69
12	Management of companies & enterprises	1,794	\$1,786.00	2%	63
13	Grocery & related product merchant wholesalers	2,474	\$1,264.00	2%	63
14	Agencies, brokerages, & other insurance related activities	569	\$965.00	9%	61
15	Machinery, equipment, & supplies merchant wholesalers	651	\$1,626.00	2%	56
16	Waste collection	233	\$971.00	13%	55
17	Commercial & industrial machinery & equipment (except automotive & electronic) repair & maintenance	190	\$917.00	20%	53
18	Local messengers & local delivery	59	\$1,329.00	15%	53

## - Most Favored Service-Providing Industries Continued -

Rank	Industry	Average Employment	Average Weekly Wage	Growth Rate	Score
19	Securities & commodity contracts intermediation & brokerage	111	\$2,284.00	6%	53
20	Spectator sports	35	\$1,431.00	37%	52
21	Other motor vehicle dealers	275	\$1,031.00	4%	51
22	Other ambulatory health care services	110	\$930.00	21%	50
23	Accounting, tax preparation, bookkeeping, & payroll services	502	\$899.00	3%	50
24	Other financial investment activities	94	\$2,129.00	6%	49
25	Business schools & computer & management training	12	\$1,761.00	26%	48
26	Specialized freight trucking	308	\$945.00	4%	48
27	Apparel, piece goods, & notions merchant wholesalers	428	\$1,133.00	2%	46
28	Agents/managers for artists, athletes, entertainers, & other public figures	5	\$1,188.00	64%	45
29	Architectural, engineering, & related services	411	\$1,128.00	2%	45
30	Freight transportation arrangement	74	\$994.00	11%	44
31	Educational support services	24	\$1,064.00	26%	44
32	Lumber & other construction materials merchant wholesalers	222	\$2,112.00	2%	44
33	Software publishers	17	\$1,322.00	14%	42
34	Electronic & precision equipment repair & maintenance	46	\$1,146.00	10%	42
35	Remediation & other waste management services	46	\$1,001.00	13%	41
36	Motor vehicle & vehicle parts & supplies merchant wholesalers	513	\$916.00	2%	40
37	Data processing, hosting, & related services	42	\$1,269.00	8%	39
38	Advertising & related services	55	\$1,085.00	8%	39
39	Legal services	363	\$977.00	2%	39
40	Hardware, plumbing, & heating equipment & supplies merchant wholesalers	267	\$1,041.00	2%	38
41	Insurance carriers	94	\$998.00	4%	36
42	Furniture & home furnishing merchant wholesalers	302	\$977.00	2%	36
43	Wholesale electronic markets, agents & brokers	149	\$1,239.00	2%	33
44	Paper & paper product merchant wholesalers	117	\$1,219.00	2%	32
45	Professional & commercial equipment & supplies merchant wholesalers	155	\$1,062.00	2%	31
46	Household appliances & electrical & electronic goods merchant wholesalers	177	\$986.00	2%	29
47	Beer, wine, & distilled alcoholic beverage merchant wholesalers	207	\$927.00	2%	28
48	Metal & mineral (except petroleum) merchant wholesalers	68	\$1,277.00	2%	28
49	Radio & television broadcasting	39	\$905.00	9%	26
50	Chemical & allied products merchant wholesalers	42	\$1,286.00	2%	22
51	Petroleum & petroleum products merchant wholesalers	40	\$1,245.00	2%	19

## Most-Favored Service-Producing Sectors: Educational Programs

NAICS	Industry	Score	Overall Rank	Educational Program
6211	Offices of Physicians	88	1	✓
5416	Management, Scientific, and Technical Consulting Services	83	2	✓
6221	General Medical and Surgical Hospitals	79	3	✓
5415	Computer Systems Design and Related Services	78	4	✓
6212	Offices of Dentists	74	5	✓
6213	Offices of Other Health Practitioners	73	6	✓
6222	Psychiatric and Substance Abuse Hospitals	71	7	✓
6214	Outpatient Care Centers	71	8	✓
5611	Office Administrative Services	70	9	✓
4411	Automobile Dealers	69	10	X
4841	General Freight Trucking	69	11	✓
5511	Management of Companies and Enterprises	63	12	✓
4244	Grocery and Related Product Merchant Wholesalers	63	13	X
5242	Agencies, Brokerages, and Other Insurance Related Activities	61	14	X
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	56	15	X
5621	Waste Collection	55	16	✓
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	53	17	✓
4922	Local Messengers and Local Delivery	53	18	X
5231	Securities and Commodity Contracts Intermediation and Brokerage	53	19	✓
7112	Spectator Sports	52	20	✓
4412	Other Motor Vehicle Dealers	51	21	✓
6219	Other Ambulatory Health Care Services	50	22	✓
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	50	23	✓
5239	Other Financial Investment Activities	49	24	✓
6114	Business Schools and Computer and Management Training	48	25	✓
4842	Specialized Freight Trucking	48	26	✓
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	46	27	X
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	45	28	✓
5413	Architectural, Engineering, and Related Services	45	29	✓
4885	Freight Transportation Arrangement	44	30	✓
6117	Educational Support Services	44	31	X
4233	Lumber and Other Construction Materials Merchant Wholesalers	44	32	X
5112	Software Publishers	42	33	✓
8112	Electronic and Precision Equipment Repair and Maintenance	42	34	✓
5629	Remediation and Other Waste Management Services	41	35	✓
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	40	36	X
5182	Data Processing, Hosting, and Related Services	39	37	✓
5418	Advertising and Related Services	39	38	✓

## - Most-Favored Service-Producing Sectors: Educational Programs Continued -

NAICS	Industry	Score	Overall Rank	Educational Program
5411	Legal Services	39	39	√
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	38	40	X
5241	Insurance Carriers	36	41	X
4232	Furniture and Home Furnishing Merchant Wholesalers	36	42	X
4251	Wholesale Electronic Markets and Agents and Brokers	33	43	X
4241	Paper and Paper Product Merchant Wholesalers	32	44	X
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	31	45	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	29	46	X
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	28	47	X
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	28	48	X
5151	Radio and Television Broadcasting	26	49	√
4246	Chemical and Allied Products Merchant Wholesalers	22	50	X
4247	Petroleum and Petroleum Products Merchant Wholesalers	19	51	X



## Most Favored Goods-Providing Industries

Rank	Industry	Average Employment	Average Weekly Wage	Growth Rate	Score
1	Other Electrical Equipment and Component Manufacturing	3,721	\$1,318.00	12%	98
2	Motor Vehicle Parts Manufacturing	1,647	\$1,034.00	5%	79
3	Bakeries and Tortilla Manufacturing	396	\$1,080.00	7%	76
4	Glass and Glass Product Manufacturing	307	\$1,109.00	8%	71
5	Nonresidential Building Construction	478	\$1,100.00	4%	71
6	Communications Equipment Manufacturing	283	\$1,914.00	6%	67
7	Residential Building Construction	677	\$1,000.00	4%	66
8	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing	208	\$1,016.00	10%	65
9	Utility System Construction	338	\$1,149.00	4%	64
10	Building Equipment Contractors	1,579	\$909.00	4%	62
11	Architectural and Structural Metals Manufacturing	205	\$977.00	8%	56
12	Other Specialty Trade Contractors	556	\$868.00	4%	55
13	Other Nonmetallic Mineral Product Manufacturing	345	\$1,053.00	3%	53
14	Commercial and Service Industry Machinery Manufacturing	62	\$2,106.00	9%	53
15	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	175	\$1,053.00	4%	48
16	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	344	\$956.00	3%	43
17	Other Fabricated Metal Product Manufacturing	358	\$904.00	2%	43
18	Paint, Coating, and Adhesive Manufacturing	128	\$883.00	7%	41
19	Metalworking Machinery Manufacturing	60	\$1,144.00	5%	40
20	Highway, Street, and Bridge Construction	162	\$987.00	4%	38
21	Industrial Machinery Manufacturing	71	\$1,518.00	3%	35
22	Agriculture, Construction, and Mining Machinery Manufacturing	65	\$1,008.00	5%	35
23	Coating, Engraving, Heat Treating, and Allied Activities	107	\$1,029.00	3%	28
24	Cutlery and Handtool Manufacturing	142	\$991.00	1%	24
25	Other General Purpose Machinery Manufacturing	40	\$1,082.00	2%	19
26	Medical Equipment and Supplies Manufacturing	130	\$862.00	2%	19

## Most-Favored Goods-Producing Sectors: Educational Programs

NAICS	Industry	Score	Overall Rank	Educational Program
3359	Other electrical equipment & component manufacturing	98	1	√
3363	Motor vehicle parts manufacturing	79	2	√
3118	Bakeries & tortilla manufacturing	76	3	√
3272	Glass & glass product manufacturing	71	4	√
2362	Nonresidential building construction	71	5	√
3342	Communications equipment manufacturing	67	6	X
2361	Residential building construction	66	7	√
3252	Resin, synthetic rubber, & artificial & synthetic fibers & filaments manufacturing	65	8	√
2371	Utility system construction	64	9	√
2382	Building equipment contractors	62	10	X
3323	Architectural & structural metals manufacturing	56	11	√
2389	Other specialty trade contractors	55	12	X
3279	Other nonmetallic mineral product manufacturing	53	13	X
3333	Commercial & service industry machinery manufacturing	53	14	√
3334	Ventilation, heating, air-conditioning, & commercial refrigeration equipment manufacturing	48	15	√
3327	Machine shops; turned product; & screw, nut, & bolt manufacturing	43	16	√
3329	Other fabricated metal product manufacturing	43	17	√
3255	Paint, coating, & adhesive manufacturing	41	18	√
3335	Metalworking machinery manufacturing	40	19	√
2373	Highway, street, & bridge construction	38	20	X
3332	Industrial machinery manufacturing	35	21	√
3331	Agriculture, construction, & mining machinery manufacturing	35	22	√
3328	Coating, engraving, heat treating, & allied activities	28	23	√
3322	Cutlery & h&ttool manufacturing	24	24	√
3339	Other general purpose machinery manufacturing	19	25	√
3391	Medical equipment & supplies manufacturing	19	26	√



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- Career planning and coaching
- Resume review & development
- Job preparation workshops
- Scholarships for training
- Business recruitment & retention services
- Skills assessment & labor market info
- Customized Youth & Young Adult Services  
- Career Advantage Program

## Jobseeker & Business Services

Alexander Career Center

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NCWorks Career Center – Burke

720 East Union St | Morganton, NC 28655 | (828) 438-6161

NCWorks Career Center – Caldwell

1909 Hickory Blvd SE | Lenoir, NC 28645 | (828) 759-4680

NCWorks Career Center – Catawba

403 Conover Station SE | Conover, NC 28613 | (828) 466-5535

The Western Piedmont  
Industry Growth Analysis is a product of



**Western Piedmont**  
Council of Governments

*Workforce Development Board*

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