

North Alabama

# Workforce

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September 2015  
Regional Workforce Summit

# 22,000 new jobs 2010-2014



*Topre*



Google



Raytheon®



**TOYOTA**  
MOTOR MANUFACTURING ALABAMA



**RUAG**

Aerospace

# Regional Advanced Manufacturing

## ■ Cullman

- Royal Technologies: 400 jobs in 2009
- Topre: expansion in 2010
- REHAU Automotive: First R&D center outside German

## ■ Dekalb

- JET Polymer Recycling: 100 jobs in 2012
- Children's Place: continued growth since 2007

## ■ Jackson

- Sanoh: 75-job expansion in 2013
- Google: 100 jobs in 2015

## ■ Limestone

- Carpenter Technology: 200+ jobs in 2011
- Electrifi: expansions in 2012 and 2014
- Polaris: April 2016 production

## ■ Madison

- Toyota: 5<sup>th</sup> expansion in 2014
- Raytheon: SM-3 & SM-6 production
- SES: 450 new jobs in 2014
- Remington: at 300 employees

## ■ Marshall

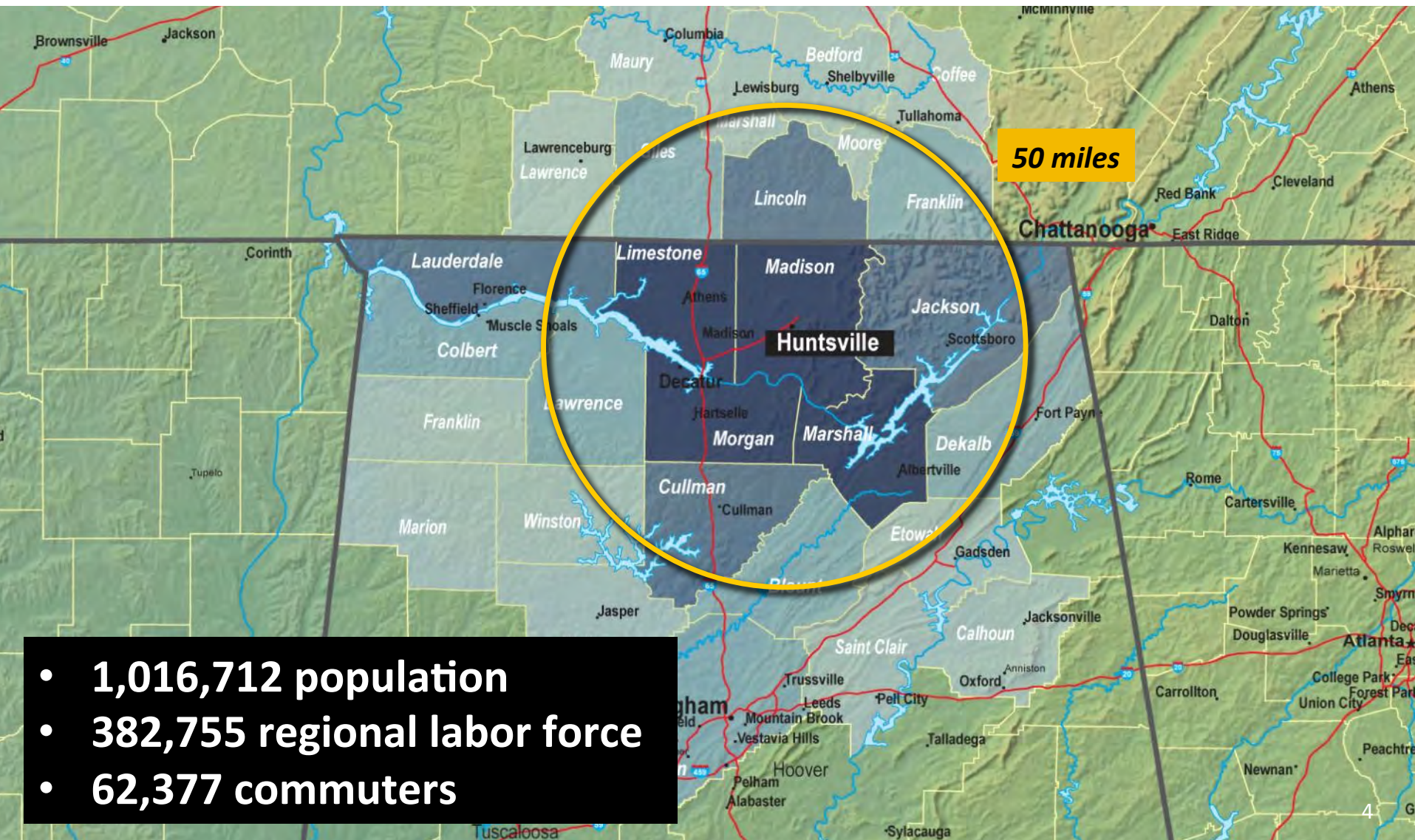
- Newman Technology of Alabama: 75-job Phase II expansion in 2014
- TS Tech: 100-job expansion announced in 2015

## ■ Morgan

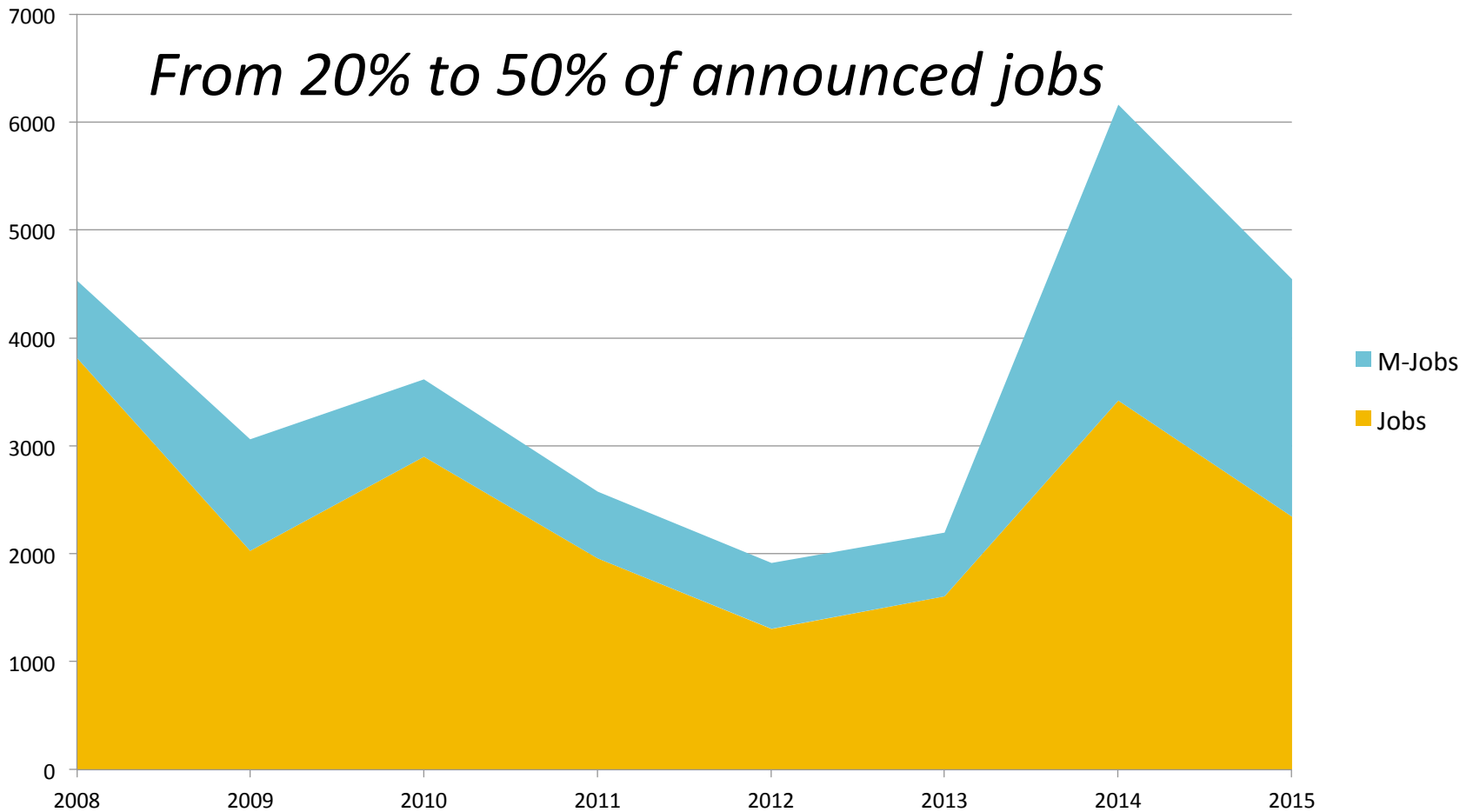
- Polyplex: North American HQ & 150 jobs announced in 2011
- RUAG: 150 jobs announced in 2015

# Workforce Area

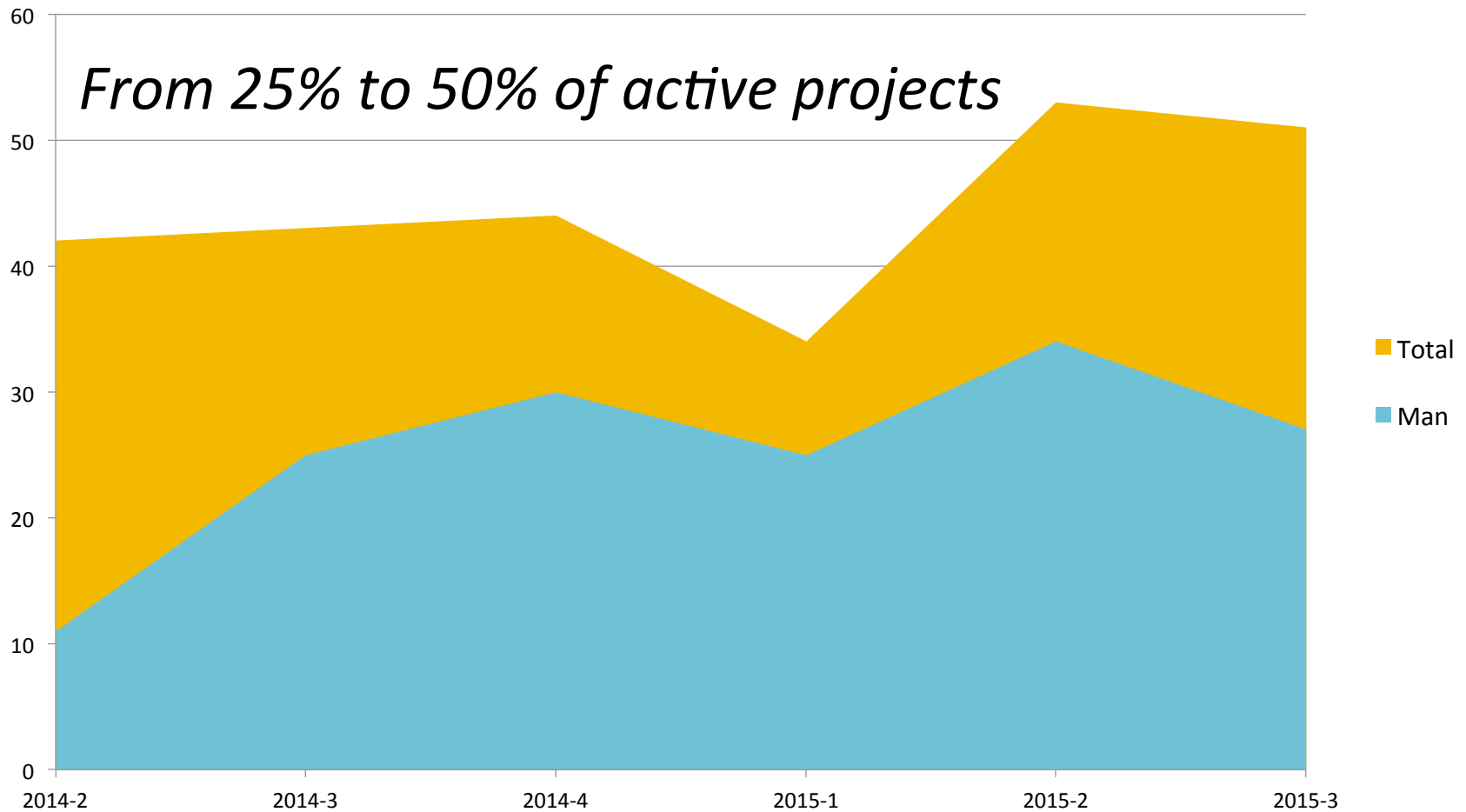
Source: US Census Longitudinal Employment Dynamics, 2011



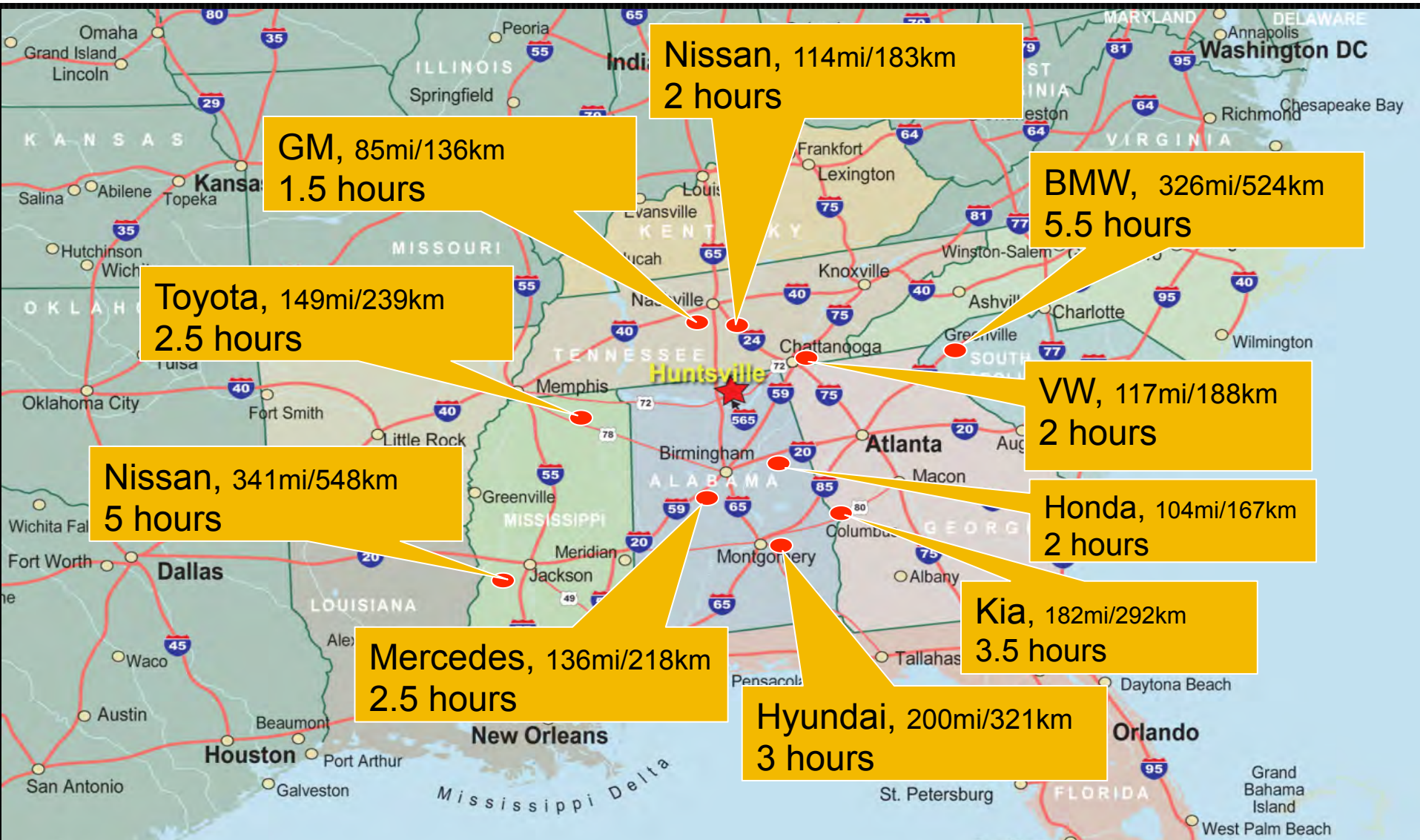
# HSV Announced Jobs 2008-2015



# HSV Project Activity



# Proximity to Automotive OEMs



# Proximity to Aviation OEMs

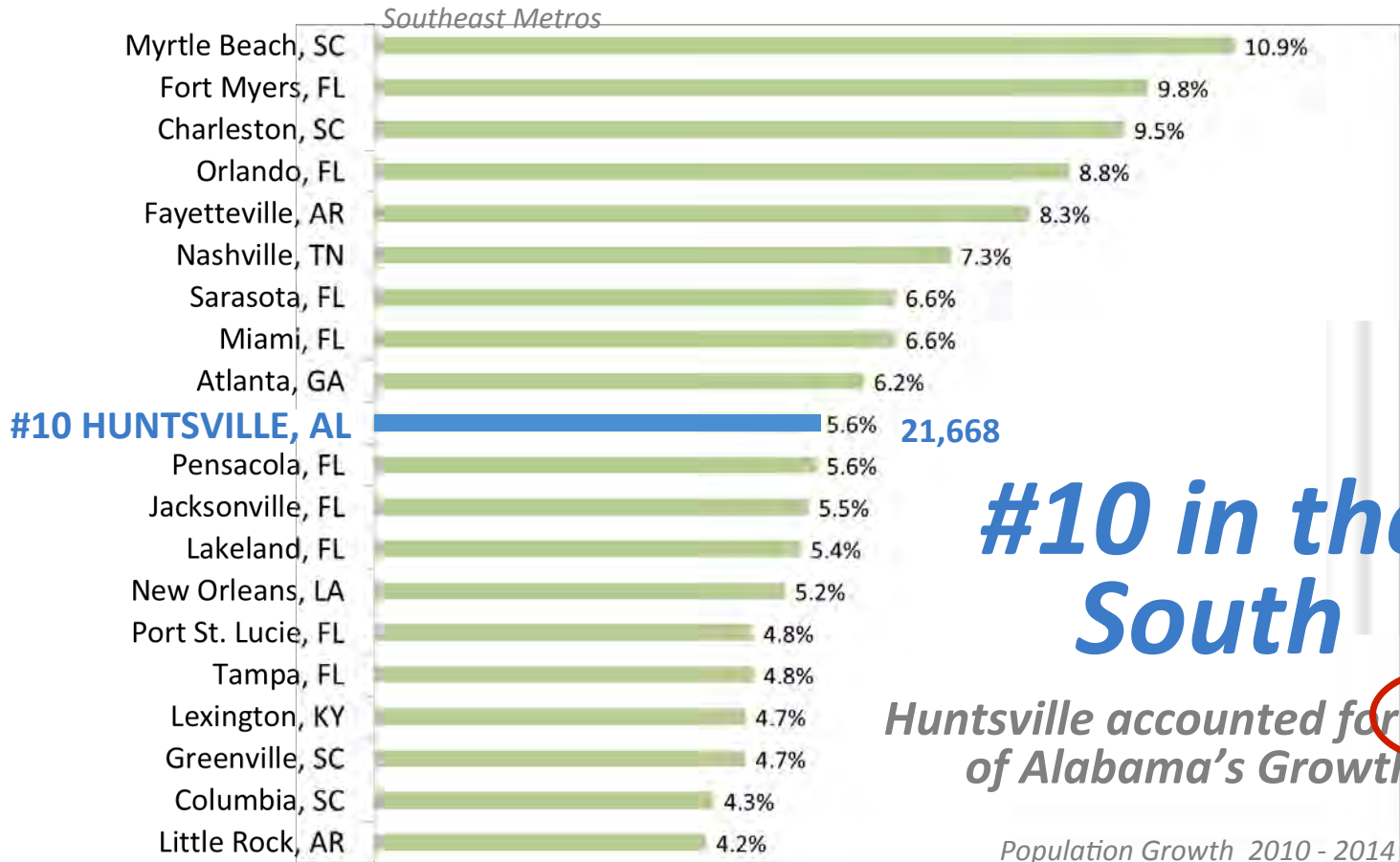




# Population Growth Trends



*Huntsville is one of the Top 35 fastest growing major metros in the country*



**#10 in the South**

*Huntsville accounted for 34% of Alabama's Growth*

Population Growth 2010 - 2014

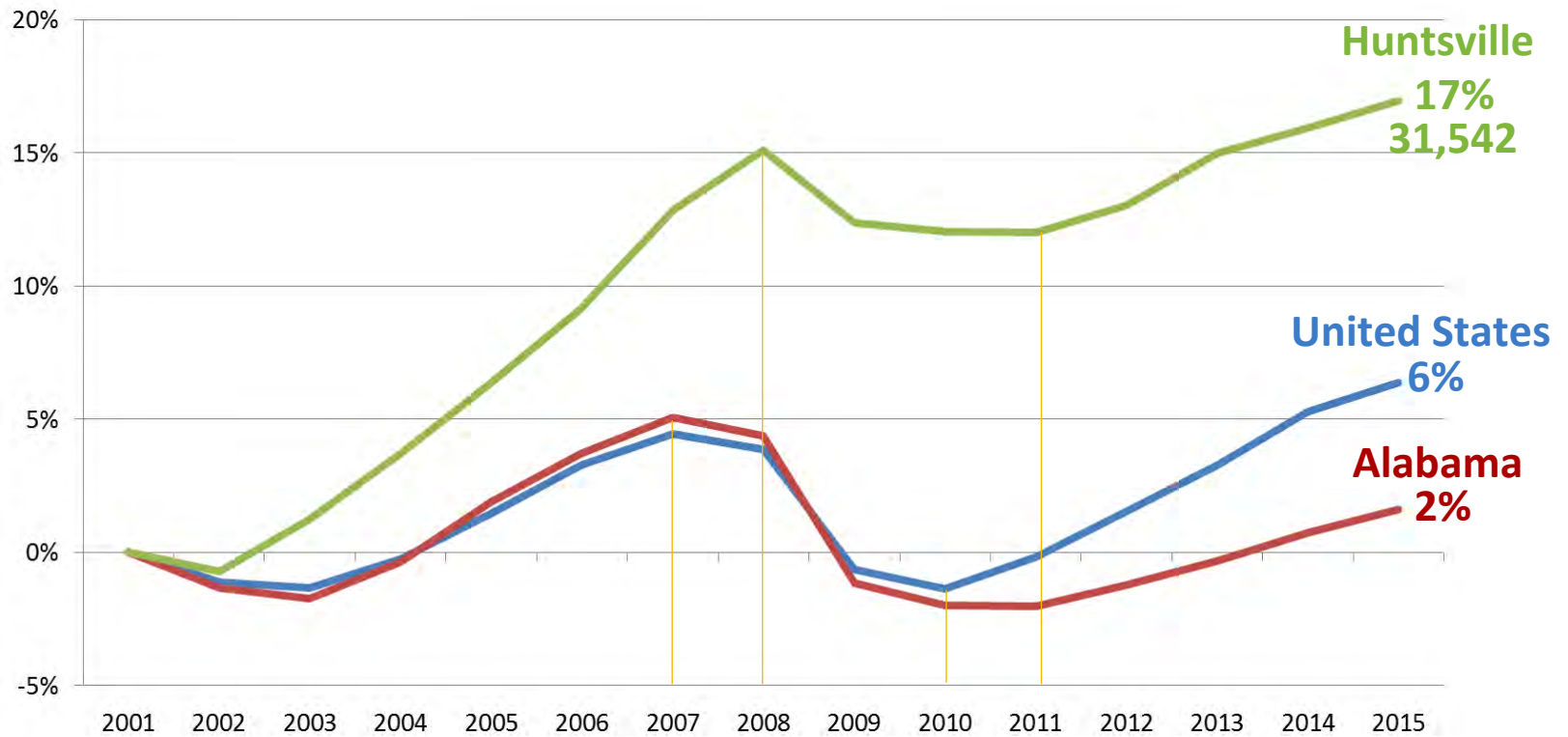
# Federal Reserve Board Metrics



FEDERAL  
RESERVE  
BANK  
of ATLANTA

## Employment Growth 2001 - 2015

Bureau of Labor Statistics

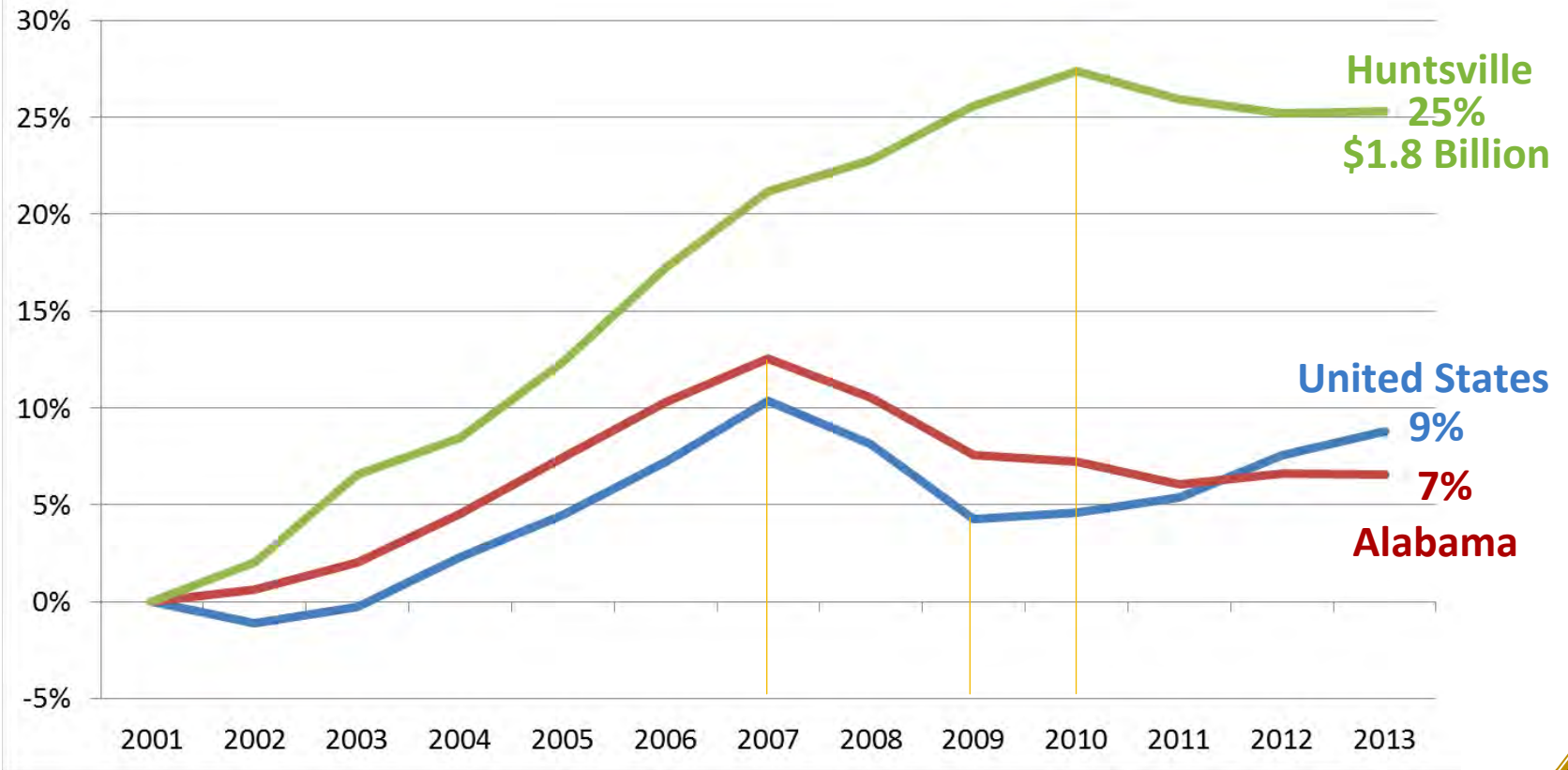


# Federal Reserve Board Metrics



## Wage & Salary Growth 2001 - 2013 *Adjusted for Inflation*

Bureau of Economic Analysis



# Moody's Economic Forecast



**Moody's**

## Huntsville Metro Area Market Report

March 2015

### ECONOMIC DRIVERS

DEFENSE



HIGH TECH



FED. GOV.



NONDEFENSE

### BUSINESS CYCLE STATUS

» EXPANSION «

Recovery

At Risk

Moderating Recession

In Recession

### STRENGTHS & WEAKNESSES

#### STRENGTHS

- » Highly educated and skilled workforce.
- » High per capita earnings due to specialized manufacturing and research.
- » Strong population growth among younger cohorts.

#### WEAKNESSES

- » Heavily dependent on public sector and related professional services.
- » Highly susceptible to cuts in federal spending on defense and NASA.



*Huntsville is one of the Top 30 fastest growing major metros in the country*

*Huntsville named one of the nation's best towns for college students*



*NerdWallet ranked Huntsville the Best Place for STEM Grads*

*Huntsville ranked one of the happiest cities in the country*



**Bloomberg  
Business**

*Huntsville one of top metros  
to “power the US economy”*

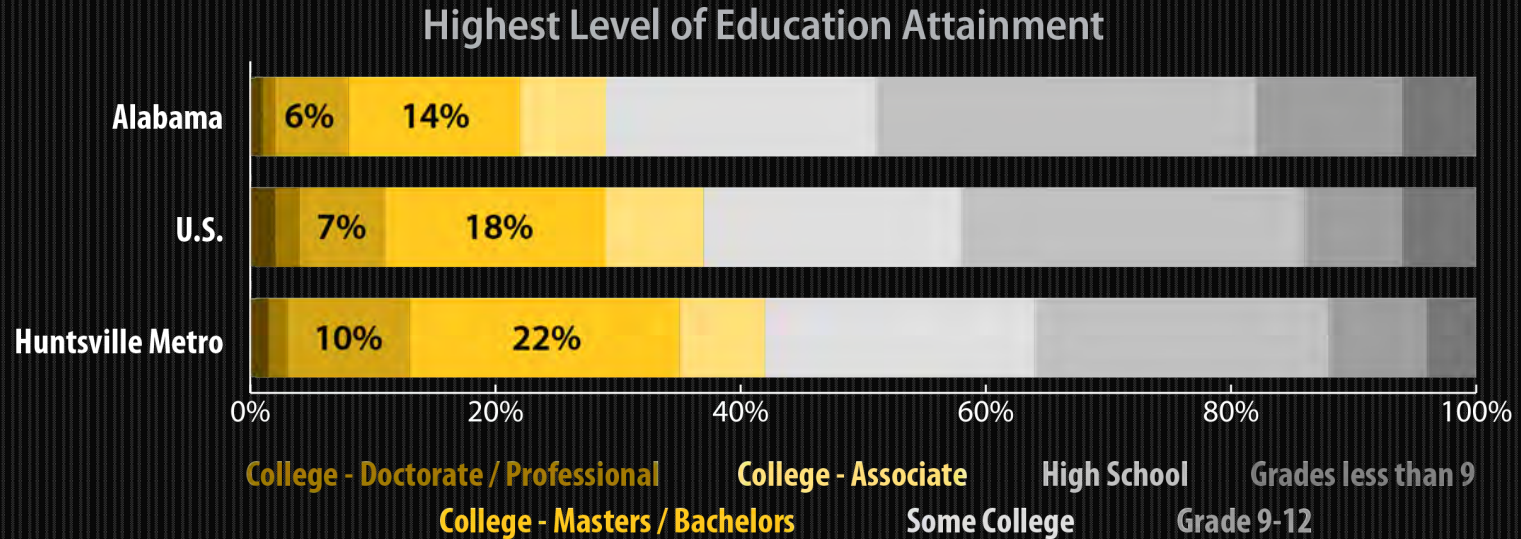
*Huntsville #2 City in  
the U.S. for Tech Jobs*

smartasset™

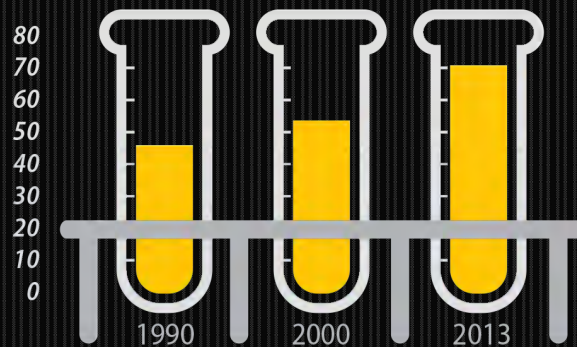
**Forbes**

*Huntsville is #1 in  
Employee Engagement*

# Educated Workforce That Exceeds State and National Averages

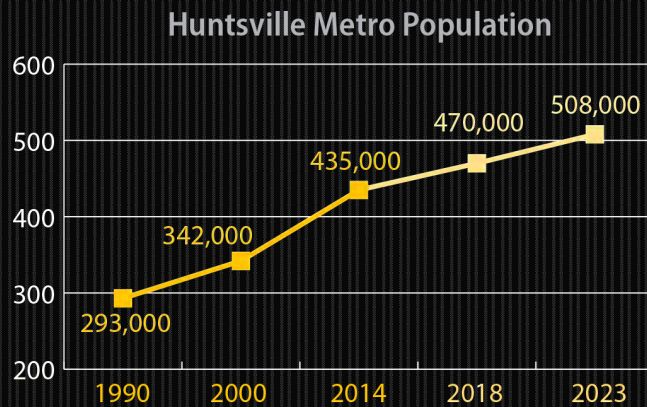
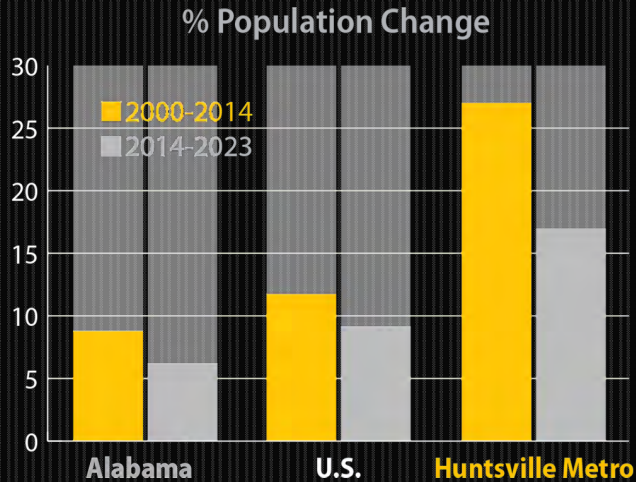


Huntsville Metro High School Educational Attainment

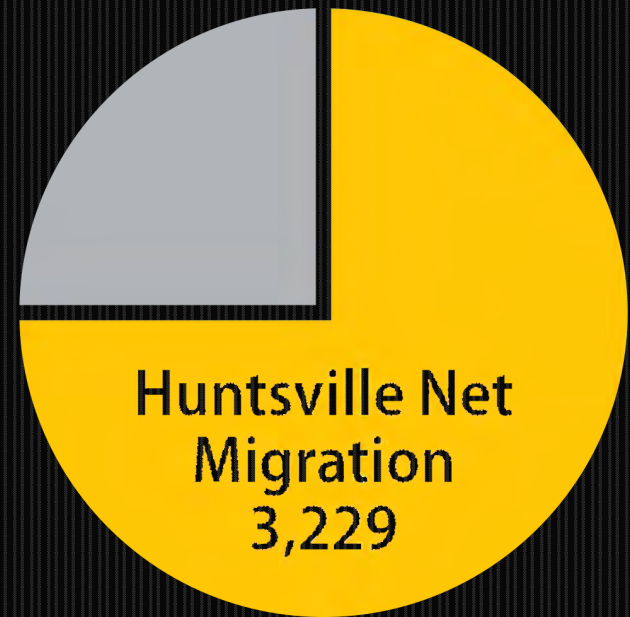


Since 1990, Huntsville's labor force with a high school degree has increased by more than 50%, from 46,000 to 71,000.

# Population That is Growing at a Rate That Surpasses State and National Averages



**Alabama Net Migration (2012-13)**





# Presence of Engineering Talent Positioned for Aerospace and Advanced Manufacturing Needs

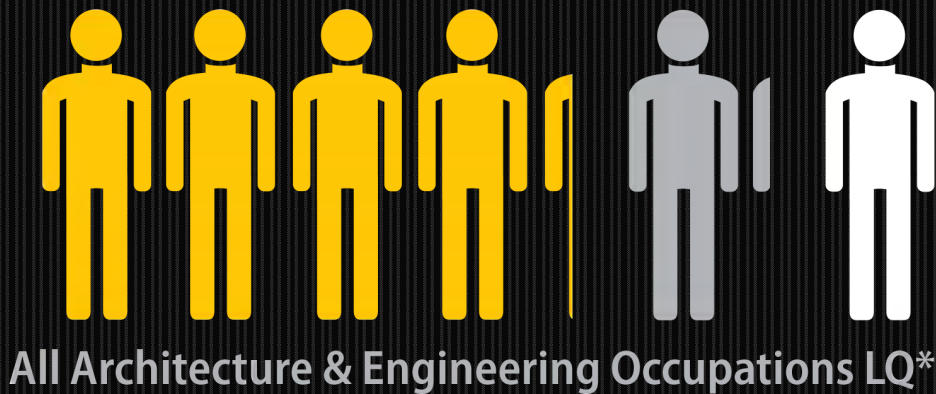
Select Manufacturing Engineering Occupations for Aerospace & Advanced Manufacturing LQ\*



Huntsville

Alabama

U.S.



All Architecture & Engineering Occupations LQ\*

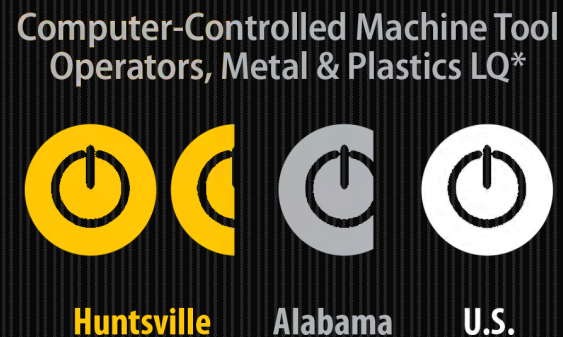
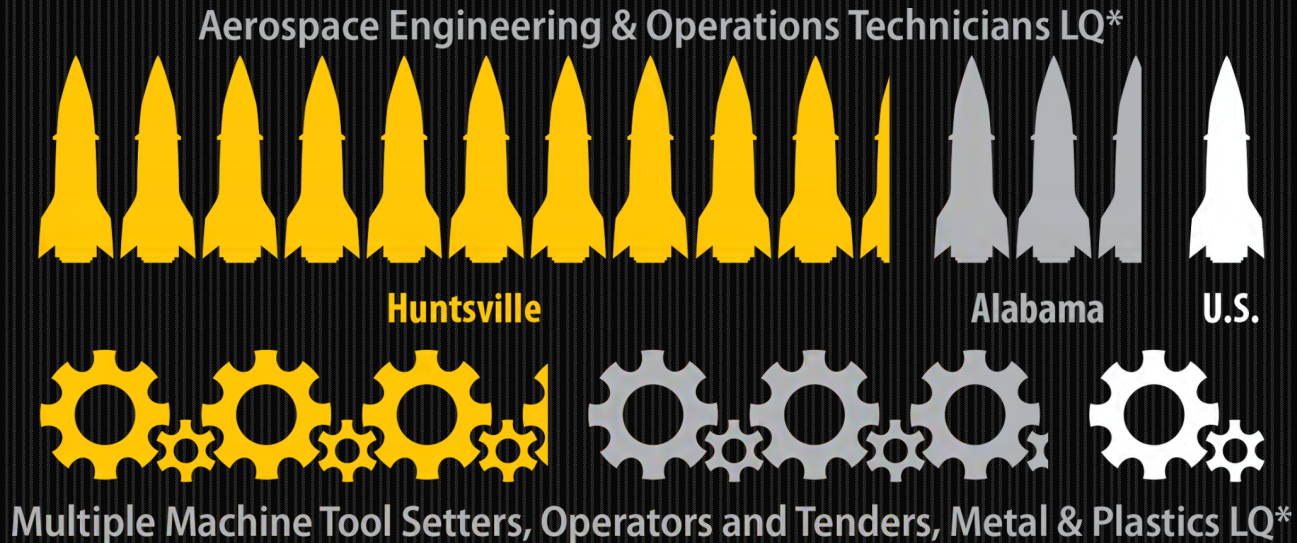
**Huntsville  
Metro Area:**

**2,400+  
aerospace  
engineers**

**2,000+ electrical  
engineers**

**1,000+ each of  
mechanical,  
industrial &  
electronics  
engineers**

# Concentration of Direct Talent That Surpasses State and National Averages



# Manufacturing Labor is a Significant Portion of the Overall Labor Force; 14% in Huntsville Versus 10% Nationwide

Mechanical Engineering Technicians LQ\*



Huntsville

Alabama

U.S.



Electrical and Electronic Equipment Assemblers LQ\*

Machinists LQ\*



Huntsville

Alabama

U.S.

Electro-Mechanical Technicians LQ\*



Huntsville

Alabama

U.S.

# Abundance of Occupations That Can Easily Transition to Meet Specific Aerospace & Adv. Manufacturing Skill Sets

## O\*NET (Occupational Information Network) Related Occupations



**70 Electromechanical Equipment Assemblers in Huntsville**

***O\*NET Related Occupations = 2,790***

**50 Electro-Mechanical Technicians in Huntsville**

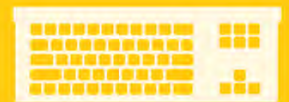



***O\*NET Related Occupations = 1,390***

# Huntsville MSA: Engineering

**TOP 15%**   
“percent of population with a Bachelor’s Degree or Higher”  
of all U.S. Metro Areas 

**HIGHEST**   
RATIO OF ENGINEERS  
in the U.S.

**HIGHEST**   
RATIO OF AEROSPACE & ELECTRICAL ENGINEERS  
IN THE NATION 

**TOP 5**   
IN THE NATION  
ratio of electronics, computer hardware & materials engineers  
  
  


# Huntsville MSA: Computer/IT



**TOP 5**  
RATIO OF COMPUTER  
**PROGRAMMERS**  
IN THE NATION

**TOP 5**  
RATIO OF SOFTWARE  
DEVELOPERS &  
**SYSTEMS**  
**SOFTWARE**  
OCCUPATIONS  
IN THE NATION

**HIGHEST**  
RATIO OF COMPUTER  
SYSTEMS ANALYSTS,  
USER SUPPORT  
**SPECIALISTS**  
IN THE NATION

# Labor Market Analysis

*“Through organic growth in the workforce, combined with focused efforts to retool employees from other economic sectors, the Huntsville area appears capable of accommodating an estimated **10,000 to 12,000** incremental manufacturing jobs over the next 10 years.”*

*-- Deloitte Consulting, July 2014*

# Port of Huntsville

2<sup>nd</sup> Longest Runway in Southeast  
Foreign Trade Zone 83; Non-Stop  
Cargo Flights: Europe, Asia, S. America

## Top Airports in the US for International Cargo

1. Miami	11. Dulles
2. JFK	12. Cincinnati
3. LAX	13. Philadelphia
4. O'Hare	<b><u>14. HSV</u></b>
5. Hartsfield-Jackson	15. Seattle
6. Dallas/Ft. Worth	16. Detroit
7. Memphis	17. Logan
8. Newark	18. Orlando
9. San Francisco	19. LA/Ontario
10. Bush IC	20. Indianapolis





# Robotics Technology Park

**THE ROBOTIC MAINTENANCE TRAINING CENTER**



**THE ADVANCED TECHNOLOGY RESEARCH AND DEVELOPMENT CENTER**

**THE INTEGRATION, ENTREPRENEURIAL AND PAINT/DISPENSE TRAINING CENTER**



# Post-secondary Partners

## Universities

Spring 2015

Alabama A&M University	4,672
Athens State University	3,037
University of Alabama in Huntsville	6,800
University of North Alabama	6,282



## Community Colleges

Spring 2015

Calhoun Community College	9,924
Drake State Technical College	990
Northeast Alabama Community College	2,371
Snead State Community College	2,141
Wallace State Community College	4,561



# Elementary & Secondary Education

- Plan 2020
- Alabama College & Career Ready Standards
- Strong public schools throughout the region
- \$175 million in “BRAC” bonds for 5 counties
- Dual enrollment
- Career Coaches
- Career & Technical Education