

Manufacturing- Part 1: Overview ^[1]

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Manufacturing

by Alfred W. Stuart

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Part 1: Overview

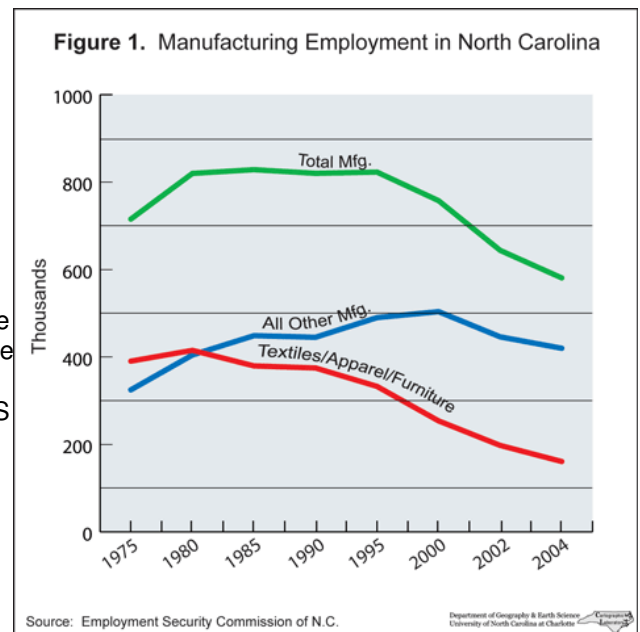
[Manufacturing](#)^[22] has long been the backbone of the North Carolina economy. In 1975, for example, it accounted for over 36 percent of all non-farm jobs in the state. Nationally, by a variety of measures, the state ranks eighth largest in the nation in manufacturing even though its only the eleventh most populous. And it ranks even higher in terms of the proportion of the total population that has a factory job.

The absolute totals for factory employment continued to rise, with some fluctuations, after 1975 before peaking in 1995. Since then they have declined steadily (Figure 1). In terms of its relation to the total economy, the decline has been even sharper. The 1975 share was halved by 2004, to just 15.4 percent of the total. The state tends to have a greater proportion in factory jobs than does the US generally. In 1997 North Carolina's share was 22.1 percent, compared with the national proportion of 15.4 percent.


Industrial employment data from the [Employment Security Commission](#)^[23] of NC for the 1990-2004 period illustrate both recent declines in manufacturing but also the considerable [diversification](#)^[24] that has taken place in this sector of the economy. For example, the textiles, apparel and furniture

industries lost a combined total of over 214,000 jobs during the period while all other manufacturing industries loss just 27,000 jobs. Increases were led by the chemicals, plastics/rubber, fabricated metals, and transportation equipment industries, which together added over 16,000 jobs. For the most part, these industries paid average annual wages that were close to or in excess of the \$37,443 average annual wage paid to all manufacturing employees in 2004. The state's highest wage industry, computers and electronics products, the fourth largest industrial employer, recorded a 24 percent employment drop, but that rate was less than that for all industries. Diversification has had a substantial geographic component to it. For example, in 2002, 63 per cent of all jobs in chemicals were in the [Raleigh](#)^[25]-[Durham](#)^[26], [Charlotte](#)^[27]-[Gastonia](#) and [Greensboro](#)^[28]/[Winston-Salem](#)^[29]/[High Point](#)^[30] [MSAs](#)^[31] and 79 percent of jobs in the computer and related electronics industry were found in these same three MSAs, led by Raleigh-Durham. Reflecting this, a national publication, *Business Facilities: The Location Advisor*^[32], ranked Raleigh-Durham fourth and Charlotte 11th highest among U.S. high-tech cities in 2003.

These changes, both national and for North Carolina, reflect both sharp cyclical and secular downturns in manufacturing activity during the recent economic slump. The cyclical decline is shown by the fact that national factory jobs declined only



0.6 percent from 1999 to 2000 but recorded a sharp 10 percent decline from 2000 to 2001, with a loss of over two million factory jobs in that one year alone. However, the North Carolina slide goes back further, to the 1995 peak, reflecting the diversification noted above, a secular change. Total manufacturing employment has declined steadily since then and by 2004 the state's loss totaled over 240,000 factory jobs, a drop of nearly 30 percent since 1990 (Figure 1). Thus, while the national losses reflect a short-term, cyclical loss that will rebound as the economy improves, a major part of North Carolina's losses are longer-term and probably irreversible.

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Number Employed in Manufacturing in North Carolina				
US Bureau of Labor Statistics. NC Dept. of Commerce. NC EDIS (Economic Development Intelligence System) https://edis.commerce.state.nc.us				
	1990	2004	2009	
Food (311)	45,376	50,457	52,473	
Beverages/Tobacco (312)	22,950	15,381	12,831	
Textiles & Products (313, 314)	190,141	75,463	35,895	
Apparel (315)	95,862	26,750	12,212	
Wood (321)	26,284	26,468	16,378	
Paper (322)	20,851	19,355	16,632	
Printing (323)	16,941	15,501	12,499	
Chemicals (325)	40,917	45,665	40,891	
Rubbers/Plastics (326)	33,660	33,120	28,836	
Non-Metallic Mineral Prod. (327)	20,233	17,072	13,960	
Primary Metals (331)	10,628	7,412	7,059	
Fabricated Metals (332)	33,467	39,223	32,074	
Machinery (333)	38,500	30,852	26,343	
Computers/Electronics (334)	51,902	39,334	35,271	
Electric Equip./Appliances (335)	32,543	26,834	21,373	
Transportation Equipment (336)	28,574	34,384	24,847	
Furniture (337)	89,017	59,072	33,918	
Other (316, 324, 339)	22,594	16,968	15,592	
Total	Ind	820,440	579,311	439,084

Data represented using NAICS codes.
2009 statistics are from the 3rd quarter of 2009.

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