

TENNESSEE DEPARTMENT OF ECONOMIC AND
COMMUNITY DEVELOPMENT



SELECT TENNESSEE
Property Evaluation Program

FINDINGS & RECOMMENDATIONS

Lauderdale County

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Select Tennessee Property Evaluation Program

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Date: March 21, 2018

Recipients: Duane Lavery, President & CEO
HTL Advantage
1469 S. Main St.
Covington, Tenn. 38019
901-647-9971
duane@htladvantage.com

Hon. Maurice Gaines Jr., Mayor
Lauderdale County
100 Court Sq.
Ripley, Tenn. 38063
901-635-3500

From: Jonathan Gemmen, Director
Austin Consulting

Subject: Lauderdale County - Select Tennessee Property Evaluation Program
Findings and Recommendations

OVERVIEW OF PROPERTY EVALUATION PROGRAM (PEP)

The Select Tennessee Property Evaluation Program (PEP) was created for the purpose of expanding the state's inventory of industrial sites and existing industrial buildings. The goal of the program is to help drive economic growth in the state. The program objective is to create a pipeline of properties by identifying real estate that is best aligned with near-term development strategies, as well as those properties that can be cultivated for long-term, economy-stabilizing investments.

The purpose of this report is to provide stakeholders with insights into Lauderdale County's portfolio of real estate assets and associated economic development opportunities. These insights provide a basis for focusing local resources on properties that have the greatest potential for business attraction.

Corporate location decisions are routinely derived by finding a favorable balance between a community's strengths and weaknesses – whether perceived or real. At the root of a corporate location decision is real estate. A great community will be bypassed if real estate is not ready or near-ready for development at the time it is needed.

Communities, like corporations, are dynamic organizations that change in a myriad of ways with time. To remain healthy, corporations and communities alike must adapt to new demands. To be successful, corporations must alter strategies in response to changing customer preferences and shifting operating environments. Likewise, to be attractive for corporate investment, communities must recognize changing corporate needs and adjust both real estate and community offerings accordingly.

During its December 2017 visit, Austin Consulting (Austin) visited and reviewed properties and their surrounding environments to ascertain each site's ability to attract job-creating commercial or industrial growth. It also included meetings with local economic development representatives, utility providers, community planning and zoning representatives, and other local representatives important to the economic development process.

METHODOLOGY

Austin's visit to Lauderdale County was essentially a simulated professional site selector field investigation, not unlike those conducted for an actual corporate site selection client. Austin's objective was to collect sufficient information about candidate properties, the community, and local and regional economies to extrapolate two conclusions:

- The suitability and readiness of local properties (sites and buildings) for job producing development.
- The community's logical industry targets and associated investment characteristics including size and types of facilities, utility requirements, and transportation needs.

During the Select Tennessee PEP exercise, Austin looked at Lauderdale County through the lens of numerous investment types including: manufacturing, warehouse/distribution, call centers, data centers and back-office/shared services operations.

In November 2017, Austin completed a detailed evaluation of properties submitted by Lauderdale County. On December 5, 2017, Austin representatives Jonathan Gemmen and Charles Slife completed a visit to Lauderdale County to assess and gather information on five properties proposed for potential industrial development.

Recommendations contained in this report reflect Austin's experience in assessing the suitability of communities and properties for industrial operations. Austin's assessment incorporates:

- Property readiness for development including utility services, road access, zoning and environmental attributes
- Neighborhood attributes including site access, neighboring land uses, site curb appeal and local development trends
- Community attributes including quality/reliability/capacity of utility systems, growth trends, land use planning, quality of place and overall community engagement in economic development
- Regional attributes including existing and planned transportation infrastructure, population growth trends, the nature and distribution of job creation, and availability of developable land

DISCLAIMER:

Any views or opinions presented in this report are those of Austin Consulting and do not necessarily represent those of the Tennessee Department of Economic and Community Development or other organizations or individuals. The opinions expressed in this report draw on Austin's extensive experience in property and community evaluation for corporate clients. This report is based solely on Austin's interpretation of information gathered during the time frame allotted to this project.

COUNTY PROFILE

Lauderdale County is located in West Tennessee, northeast of the Memphis metropolitan area. Communities in Lauderdale County include Gates, Halls, Henning, and the county seat, Ripley. It is bordered by Dyer County to the north, Crockett County to the east, Haywood County to the southeast, and Tipton County to the south. Mississippi County, Arkansas is west of Lauderdale County; however, there are no direct connections across the Mississippi River between the two counties.



Lauderdale County has a total area of 508 square miles and is located within two physiographic regions: the Mississippi Embayment (also known as the Mississippi floodplain) and the Gulf Coastal Plain. The county is bound by rivers on three sides: the Mississippi River to the west, the Hatchie River to the south, and the South Fork Forked Deer River to the north. U.S. Route 51 is the primary road through the county, connecting to Dyersburg to the northeast and to Memphis to the southwest. The State of Tennessee has proposed constructing Interstate 69 through Lauderdale County and West Tennessee. Interstate 69 exists in segments across the central United States, from the Mexican border to the Canadian border. Advocates for the interstate have termed it the *NAFTA Superhighway*, though this name is also used for other routes through the central United States.

According to 2016 estimates from the U.S. Census Bureau, the population of Lauderdale County is 26,773, a three percent decrease from the 2010 Census. Data from 2015 show that there were 5,782 primary jobs in the county, a jobs per capita rates of 0.21. This rate is slightly

below the average for Tennessee counties. As of October 2017, Lauderdale County's unemployment rate was 5.3 percent. Nearly 44 percent of employed Lauderdale County residents commute to jobs in surrounding counties, especially in Dyer, Tipton, and Shelby.

Unlike many distressed counties in Tennessee, Lauderdale County's population distribution mirrors state and national trends. The average age in Lauderdale County is 37, younger than many other distressed counties in Tennessee. Slightly more than three of every four county residents have at least a high school diploma or equivalent.

Data from 2016 show that private sector employment in Lauderdale County is concentrated in the following sectors: manufacturing, wholesale, and health care. The county's largest industry sector by employment in government, with more than one in four jobs in the county.



GENERAL FINDINGS

This section outlines general findings from Austin's site visit to Lauderdale County as well as themes that should be considered as local officials and economic development practitioners position sites for industrial development.

WALKER EAST INDUSTRIAL PARK

The Property Evaluation Program allows participating communities to better understand their real estate assets. The program helps communities learn which buildings/sites are suited for near-term industrial investment, thereby allowing responses to Requests for Information (RFIs) to be more strategic and highly competitive. Additionally, the program helps communities to understand which properties require improvements to become viable candidates for industry attraction in the long term. This long-term view serves as a starting point from which community leaders can devise economic development strategies.

The properties that Austin toured during its PEP visit included both near and long-term real estate assets. But, the property in Lauderdale County with the greatest immediate economic development potential, which is not reviewed in this report, is the Walker East Industrial Site. This site, located south of Ripley, is on track to receive the Select Tennessee Certified Site designation in 2018.

The Walker East Industrial Park is Lauderdale County's strongest prospect for economic growth for a number of reasons. Unlike the two sites that Austin toured, Walker East is much closer to being shovel-ready. Its acreage is much lower than that of the Tupperware Site, but the Tupperware site is unusually large and beyond the acreage requirements of most companies. Therefore, Walker East is still able to compete for investment, especially among prospects considering rural locations. A new access road onto the site, as well as the availability of public utilities, ensures that a company's production would not be delayed by incomplete infrastructure projects.

No sites in Lauderdale County are competitive for companies that require interstate access. But, TN-19 offers connections to both US-51 to the west and Interstate 40 to the southeast, making Walker East relatively convenient for inbound and outbound freight movements. More importantly, Walker East is near the proposed right-of-way for Interstate 69. The completion of this interstate would make the Walker East site, and other land around Ripley, more attractive for private investment. Development, induced or otherwise, typically gravitates towards interstates, resulting in increased land prices in its vicinity. With a suitable reassurance that the interstate will be completed, a company may view Walker East as an opportunity to invest before real estate costs increase and/or this specific property is no longer available.

Despite being near Canadian National Railway tracks, rail service to the Walker East site does not appear to be feasible for a number of reasons. First, the site's size, 85 acres, may be insufficient for many businesses that transport goods by rail. Rail users tend to be very large, requiring sites with more acreage than Walker East. Second, connecting the mainline to the site's developable portion would require the construction of a new rail spur. Spurs are expensive, meaning that the cost of installation may outweigh its resulting economic benefit. Third, and most significant, a new rail spur would have to overcome a substantial grade change to connect to the railroad's main line. As it travels north/south near the site, the Canadian National's track sits atop an artificial ridge that rises as high as 20 feet above surrounding land. As a result, substantial site work would be necessary to create a shallow grade, allowing slow-moving freight train to ascend the hill towards, or descend the hill from, the main line. In all likelihood, this grading work would cause an already expensive project to escalate in cost further.

Even without rail, the Walker East is a competitive property and should be promoted by Lauderdale County as a potential project site. The Select Tennessee Certified Site will increase the site's appeal, market it to a wider audience, and increase the likelihood that a company will locate on it. Efforts to promote the Walker East site can be strengthened by working with economic development partners, whom site selectors contact for quick information on available properties in large regions.

The sites that Austin reviewed in Lauderdale County require varying levels of attention from the community's economic development team. Nevertheless, moving these sites towards a developable status should not distract from the county's foremost economic development focus, locating a company on the Walker East Industrial Site.

INTERSTATE 69

Transportation infrastructure is a critical factor when companies and site selectors compare communities for largescale investment. For this reason, properties with close proximity to an interstate highway are especially appealing. Interstates allow for the fast and efficient transport of inbound and outbound goods. Additionally, they create larger labor sheds from which companies can draw workers. The value that industry places on interstate highways is evident in RFIs, which often require that candidate properties, submitted by communities, be within a specified distance of an interstate. The nearest interstate to Lauderdale County is Interstate 155, ten miles north of the county line in Dyersburg. The primary route to Interstate 155, through Dyersburg on US-51, forces through-traffic across busy intersections, alongside local vehicles.

Being located distant from an interstate does not necessarily remove a site from consideration by companies and site selectors. In reality, site selectors use *interstate* as a shorthand term for *four-lane, controlled-access highway*. Whereas all interstates have four-lanes and are controlled-access, many roads, which are not interstates, meet these criteria as well. For example, portions of US-51 north of Dyersburg are built to interstate standards, even though the road does not have an interstate designation. Communities with non-interstate, controlled-

access can be strong candidates for companies that state a need for interstate access. Unfortunately, Lauderdale County's primary highway, US-51, is not controlled-access, meaning that it is not built to interstate standards and would be unacceptable for many prospective companies.

Through Lauderdale County, US-51 is a high-speed divided roadway that moves vehicles efficiently. The road's fatal flaws lie to the north and south, where the road passes through Dyersburg and Covington. Intersecting roads, traffic signals, curb cuts, and school zones all slow traffic and increase the likelihood of accidents and delays. For this reasons, prospective companies may be reluctant to invest in Lauderdale County, even if the Lauderdale portion of US-51 has lighter traffic and moves more efficiently.

Interstate 69 is proposed to travel through Lauderdale County as it is extended southward. The completion of a four-lane, controlled-access highway through Lauderdale would make the county more competitive and more compelling for private sector investment.

Currently, Interstate 69 comprises several segments of highway in the central United States, with the longest continuous portion lying between Indianapolis and the Canadian border at Port Huron, Mich. Plans exist to extend the road southwest from Indianapolis, thereby creating a singular route between Canada and the Mexican border at McAllen, Texas. Envisioned as a facilitator of North American trade, the highway has been dubbed the *NAFTA Superhighway*. Upon completion of existing plans, Interstate 69 would enter Tennessee and travel through Memphis on existing highways, then continue northeast to Kentucky on a new route, roughly parallel to US-51. In Lauderdale County, documents from the Tennessee Department of Transportation show the road crossing the Hatchie River concurrent with US-51, then traveling to the east of Henning and Ripley on a new road. North of Ripley, the road would cross US-51, remaining west of it until joining Interstate 155 in Dyer County.

The completion of Interstate 69 in West Tennessee would have a dramatic effect on the regional economy, especially for counties, like Lauderdale, which are small, rural, and distressed. Currently, much of the truck traffic between Canada and Mexico bypasses Tennessee entirely, with Interstate 55 to the west in Arkansas being the most direct route. A new interstate in Tennessee would provide a more direct route for through traffic and its presence in the region would strengthen the likelihood for private sector investment. West Tennessee has many qualities that site selectors favor, e.g. flat land, mid-continent location, low unionization. An interstate would resolve a major shortcoming of the county that deters projects, transportation access. Lastly, an interstate would encourage economic diversification, as industry sectors that rely heavily on interstates to transport goods would begin to consider Lauderdale County as a strategic operational location.

Unfortunately, the status of Interstate 69 is unclear, preventing it from acting as a competitive advantage that Lauderdale County can sell to businesses and site selectors. Information on the project's history and the road's proposed route are readily available, but details on

construction are not. For example, Interstate 69's route through Tennessee is broken into three construction segments, with the TDOT website describing each segment's stages and timelines. Yet, timeline dates appear to be inaccurate, with many construction dates having passed with no sign of movement. News reports from 2016 suggest that funding exists for construction, but only for a small portion of the road near Union City in Obion County.

A report dated June 29, 2017 from The Tennessean suggests that \$78.5 million from the recently-passed IMPROVE Act will fund the construction of a 5.4-mile segment of Interstate 69 in southern Lauderdale County. Though this is promising, it would do little to affect the county and regional economy upon completion if it were nothing more than an orphaned piece of interstate. The road's positive effects rely on its construction through West Tennessee and adoption as a through route for interregional traffic.

It appears that a stumbling block to the comprehensive construction of Interstate 69 through West Tennessee is that no federal funds have been allocated to the project. If this is the case, Lauderdale County (and other counties in the region) may advocate for a state-funded project. As described previously, site selectors use *interstate* to refer to divided, controlled access highways. A controlled access roadway would benefit West Tennessee, even if it were not formally designated as an interstate route. It is possible for a state road to be converted into a signed interstate after construction. However, this would not be possible if the road had not been designed to meet modern interstate standards.

The lack of an interstate or interstate-quality highway prevents Lauderdale County from competing for many economic development projects. The completion of Interstate 69 through the county would have a catalytic effect on the local and regional economy. Though concepts exist for the interstate, its current status raises more questions than answers. To best strengthen the Lauderdale County economy in the long term, local leaders may consider advocating for its construction as a state route, lobbying state and national leaders to ensure that money is allocated for the project.

RAIL-SERVED DEVELOPMENT

The Canadian National Railroad travels north-to-south through Lauderdale County, passing through Ripley and near multiple current and potential industrial properties. The railroad company's lines converge from Canada in Chicago, before traveling south to New Orleans and ports near the Gulf of Mexico. Because of this, the railroad is an important part of the Canadian economy, allowing Canadian companies to export their products, and import raw materials from around the world, through the Port of New Orleans. According to railroad officials, 18 to 20 trains pass through Lauderdale County daily.

Though many trains travel through the county, the overwhelming majority are through traffic that do not stop to serve local companies. Railroad officials estimate that three trains per week serve businesses along the route in Tennessee, with the remainder continuing southbound to

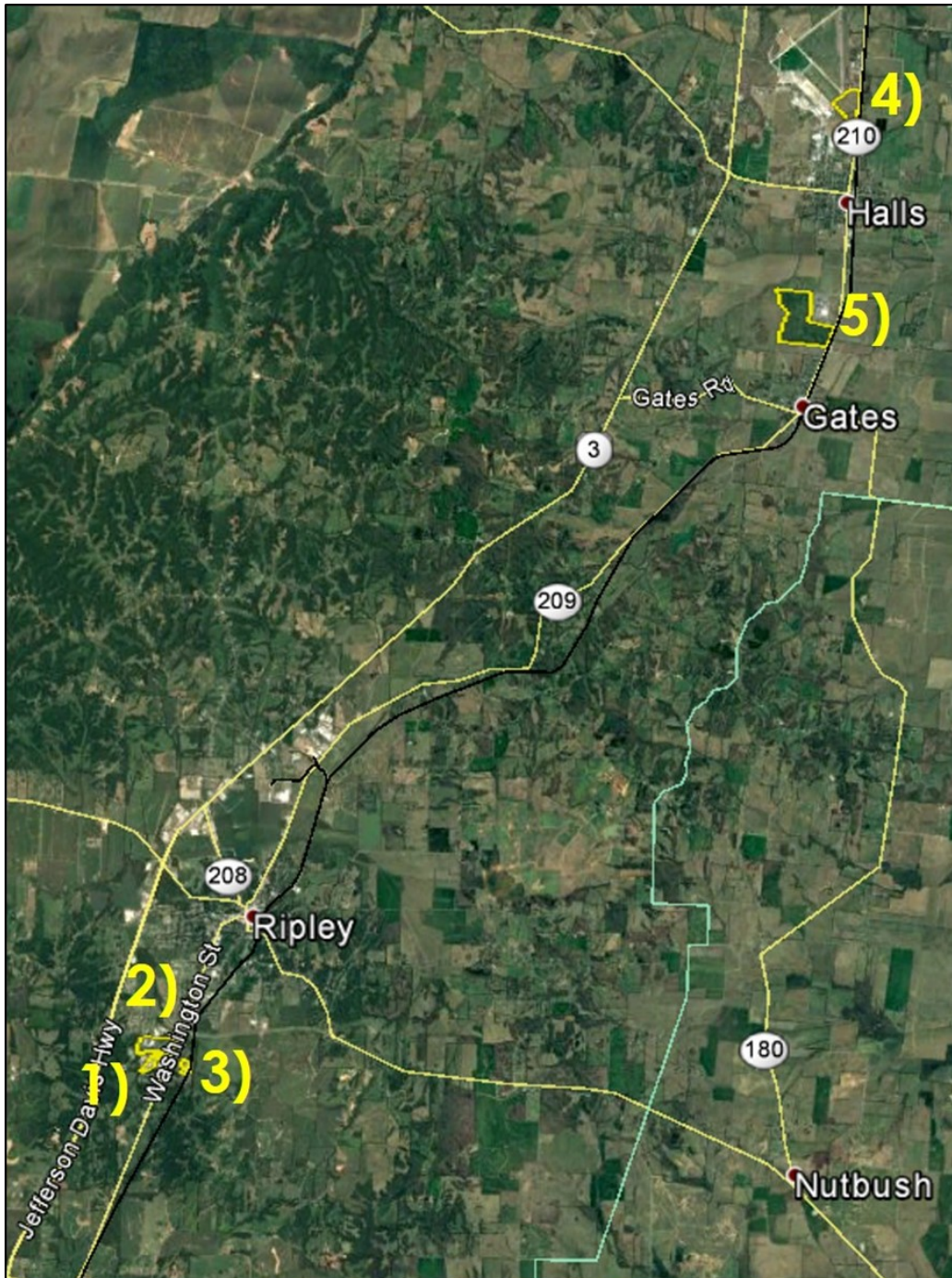
New Orleans or northbound to Chicago. In terms of attracting rail-served industries to Lauderdale County, this creates challenges for economic development professionals.

To truly benefit from proximity to Canadian National, a company in Lauderdale County would need to rely on production inputs that are either exported from Canada, or imported into Canada and the United States through the Port of New Orleans. For this reason, sites along Canadian National are less competitive for industrial development than other railroad companies, which have more extensive networks throughout the United States and greater flexibility to accommodate new customers.

Bearing this information in mind, efforts to attract rail-served businesses into Lauderdale County must be strategic. A number of the properties that Austin visited offer potential for rail service, including Walker East, the Milton Avenue Building, and the Tupperware site. It is probable that the county could identify additional properties with rail-served development potential. But, considering that rail-served sites in the region along other railroads offer greater flexibility, the Canadian National line through Lauderdale County is not a strong competitive advantage. Therefore, it would be unwise for local leaders to over-prioritize rail-served business attraction efforts to the detriment of more typical location projects.

INTRODUCTION OF SITES

The goal of this Select Tennessee Property Evaluation Program report is to help communities identify prime industrial sites and buildings that, with varying degrees of investment, could attract new industrial operations to Lauderdale County. During its December 2017 site visit, Austin toured five properties and, subsequently, has conducted an in-depth analysis of each.



#	Site	Summary
1	164 Viar Avenue ± 78,500 SF <i>Ripley, Tenn.</i>	A 78,300-square foot building under public ownership. Its interior space is L-shaped and consists of two large spaces with clear heights of 28 and 35 feet. The facility was used previously for electroplating by an automotive supplier. To the rear of the building is an open space. Dilapidated industrial buildings sit to the west of the property.
2	421 Commerce Street ± 101,500 SF / 50 acres <i>Ripley, Tenn.</i>	A 101,500-square foot building that has been vacant less than a year, on a 50-acre property. The interior has 15-foot clear heights. The property contains a large retention pond, which limits the area on which new construction could occur.
3	Milton Avenue Building ± 100,000 SF <i>Ripley, Tenn.</i>	A 100,000-square foot warehouse off of TN-209. The construction of a spur to the Canadian National railroad could be accommodated with the purchase of an additional property to the north. The building is not connected to municipal wastewater and is being used for storage by its owner.
4	Highway 210 North Site ± 50 acres <i>Halls, Tenn.</i>	A 50-acre site north of Halls, divided by a stream. Located immediately south of an active airport runway, FAA regulations, likely, reduce the site's developable acreage substantially.
5	Tupperware Site ± 200 acres <i>Halls, Tenn.</i>	A 200-acre, L-shaped property located south and west of a former Tupperware manufacturing facility. The site slopes upward, away from TN-88, and is used for agriculture. A spur from the Canadian National railroad is adjacent to the property, and sufficient land exists to extend the spur onto the site.

DETAILED PROPERTY EVALUATION

164 Viar Avenue



164 VIAR AVENUE	
General description	A large, vacant industrial building with two large manufacturing spaces
Total square footage	+/- 78,300 SF
Square footage breakdown	Production SF: 73,500 SF Office SF: 4,800 SF
Site Acreage	5 acres
Ownership	Public
Transportation access	0.25 miles west of TN-209, 1.0 mile east of US-51
Current zoning	Industrial
Utility Infrastructure	
Electricity	Ripley Power & Light
Natural gas	Ripley Gas & Water <ul style="list-style-type: none"> • 2-inch line
Water	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Wastewater	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Lease rate	\$2.25/SF
High level of assessment of potential environmental risks	Unknown. However, airborne asbestos could be a concern if the demolition of neighboring buildings does not include dust mitigation procedures.

Note: Site acreage is approximate. Utility service information was provided by each respective provider.

Summary

The building at 164 Viar Avenue, which is owned by Ripley Power & Light, is located near US-51 within Ripley city limits. The property, which contains multiple structures (one of which Austin is analyzing in this report), is bound by a stream to the east and two structures to the west. The structures on the neighboring property are extremely dilapidated. According to site visit participants from Lauderdale County, those buildings have not been demolished due to environmental concerns, presumably the presence of asbestos, or other contaminants, within the structures.

The building that Austin reviewed was constructed in two portions. A low clearance area connects a front industrial space, with 28-foot clear heights, to a rear industrial space, with 35-foot clear heights. Concrete floors inside of the building are reported to range in thickness from 12 to 18 inches. Austin observed puddles of water on the floor, but was unable to determine the water's source. Common causes for standing water in industrial buildings include holes in the roof and cracks in aerial pipes.



Along the northern side, seven dock doors and one drive-in door lead directly into the front industrial space. One drive-in door in the rear industrial space opens to an outdoor concrete area, which could be used for storage by a future building tenant.

Office space would be available for use by a tenant. Though this space large is functional, it is unappealing and unlikely to be seen as an asset of the building. Having few windows, the building lacks natural light and is musty. Additionally, Austin observed bird droppings in the office space that need to be removed.



Two driveways, one to the building's east and a second to the building's west, connect the rear concrete area to Viar Avenue. The eastern drive follows a stream and is used by Ripley Power & Light vehicles to access additional buildings, which are located to the property's rear. These additional buildings are used as storage by Ripley Power & Light and are not available to prospective businesses. The narrower, western drive is not well-suited for industrial traffic due to a large utility box in the driveway near Viar Avenue. The most ideal route to the property's rear would be through the adjacent property to the west, which is owned separately and has buildings that need to be demolished.

Utilities

Ripley Power & Light, the building's owner, provides electric service to the building from the Walker East Substation. The substation, which is approximately 1.5 miles east of the building, has an excess capacity of 22.5 MW and is served by 161-kV transmission lines. Space exists at the substation to double its capacity from 37.5 MW to 75 MW. In the event of a power failure, the diesel-fueled Jane Meadows Generation Plant is available as a back-up power source and has an eight-megawatt capacity. This plant lies directly across Viar Avenue from the building. Ripley Power & Light also provides fiber infrastructure throughout the community.



According to a representative from Ripley Gas & Water, this utility company has natural gas, water, and wastewater infrastructure at the building. Two meters connect to a two-inch natural gas main in Viar Avenue, with 40-psi. A gate station, where Ripley Gas & Water receives its supply from Texas Gas Service, is approximately two miles east of the site near TN-19. Large natural gas consumers have the option to purchase directly from Texas Gas Service at a reduced rate, with Ripley Gas & Water charging a modest transport fee.

A six-inch main in Viar Avenue provides the building with potable water. It connects to a water treatment plant with excess capacity of 1.2 million gallons per day. Water drawn from wells undergoes treatment, which includes the removal of naturally occurring iron. The system has five storage tanks, capable of storing 2.7 million gallons of water total. This is enough to sustain the community for more than two days. The South Elevated Storage Tank, approximately 2,000 feet from the building, holds one million of those gallons.

A lateral sewer line connects the building to a six-inch wastewater main in Washington Street (TN-209). From there, effluent travels to a wastewater treatment plant located west of Ripley along TN-19. The plant consists of three lagoons and discharges treated water directly to the Mississippi River through a force main. The lagoon system has capacity to treat an excess 1.4 million gallons of effluent per day.

Conclusions

164 Viar Avenue is a well-kept, large building that would be attractive to many companies seeking existing industrial space. Its location near US-51 allows for easy access for industrial traffic. If constructed according to existing plans, Interstate 69 would bypass Ripley, roughly 2.5 miles east of the site. Though the interstate's completion could be years away, it could bode well for the building's long term appeal.



The building's clear heights are well-suited for most industrial operations. It is also easily divisible, should multiple parties express interest in leasing only one of the two large industrial spaces. Its connections to public utilities support most industrial uses and its electric redundancy is noteworthy, due to the building's location near a back-up generation plant.

HTL Advantage, Ripley Power & Light, and the Lauderdale Chamber should work collaboratively to market this building to prospective businesses. Lauderdale County does not have any spec buildings; however, the building at 164 Viar Avenue can be thought of as one. It is large, able to be occupied quickly, and is owned by the public sector.

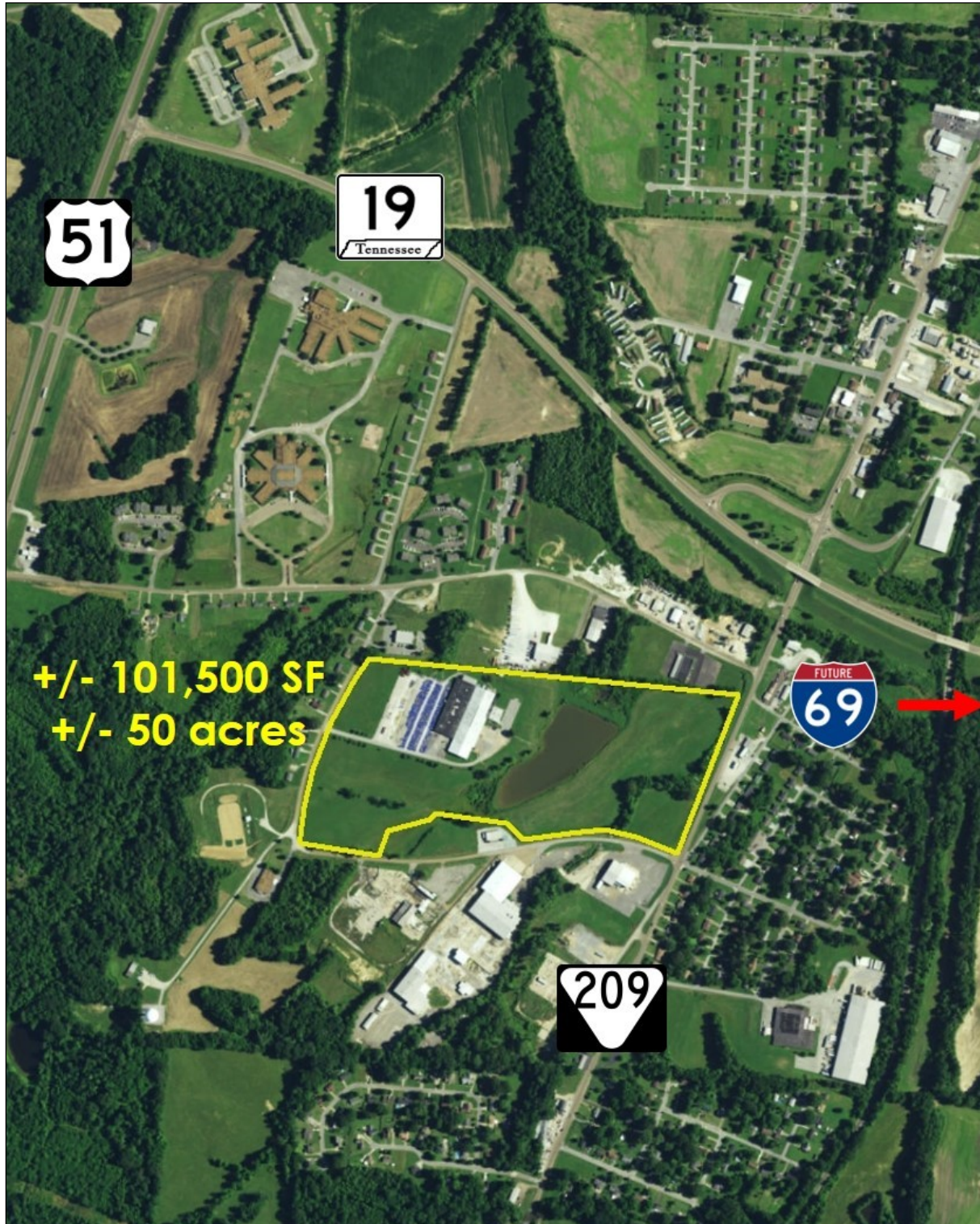
A significant deficiency of this building is its curb appeal. Even though it is in good condition, the deplorable condition of buildings immediately to the west is distracting for visitors. These structures may falsely suggest that the community is downtrodden and distressed, which may deter investment from those unfamiliar with the community or region. Economic development leaders should encourage enforcement actions against the adjacent property owner. For example, formal condemnation notices for the buildings (if they do not exist already) and fines could spur action from ownership. Additional enforcement may also be available from the Environmental Protection Agency (EPA), if the buildings contain asbestos or other harmful materials. In all likelihood, the cost to rehabilitate these buildings greatly exceeds their value, meaning that demolition may be the only realistic option for neighboring properties that will benefit 164 Viar Avenue and the community.



Recommendations/Next Steps

- Promote the building as an opportunity for businesses seeking an existing building into which they can locate. To broaden the building's appeal, emphasize its divisibility in promotional materials, conversations with economic development partners, and communications with prospective occupants.
- In partnership with government offices and agencies, compel the property owner to the building's north to demolish unsightly structures, as they reflect poorly on the available building and the surrounding community.
- As needed, invest funds into the building for its maintenance to prevent the structure from deteriorating and losing market appeal.
- The building's office space is functional, but not attractive. It could be cleaned, specifically by:
 - Removing animal droppings; and
 - Removing dust that contributes to a musty scent.

421 Commerce Street



421 COMMERCE STREET	
General description	A vacant industrial building on a large property with a retention pond
Total square footage	+/- 101,500 SF
Site Acreage	50 acres
Ownership	Private
Transportation access	0.8 miles west of TN-209, 0.5 miles east of US-51
Current zoning	Industrial
Utility Infrastructure	
Electricity	Ripley Power & Light
Natural gas	Ripley Gas & Water <ul style="list-style-type: none"> • 2-inch line
Water	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Wastewater	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Asking price	\$2.25/SF
High level of assessment of potential environmental risks	Unknown

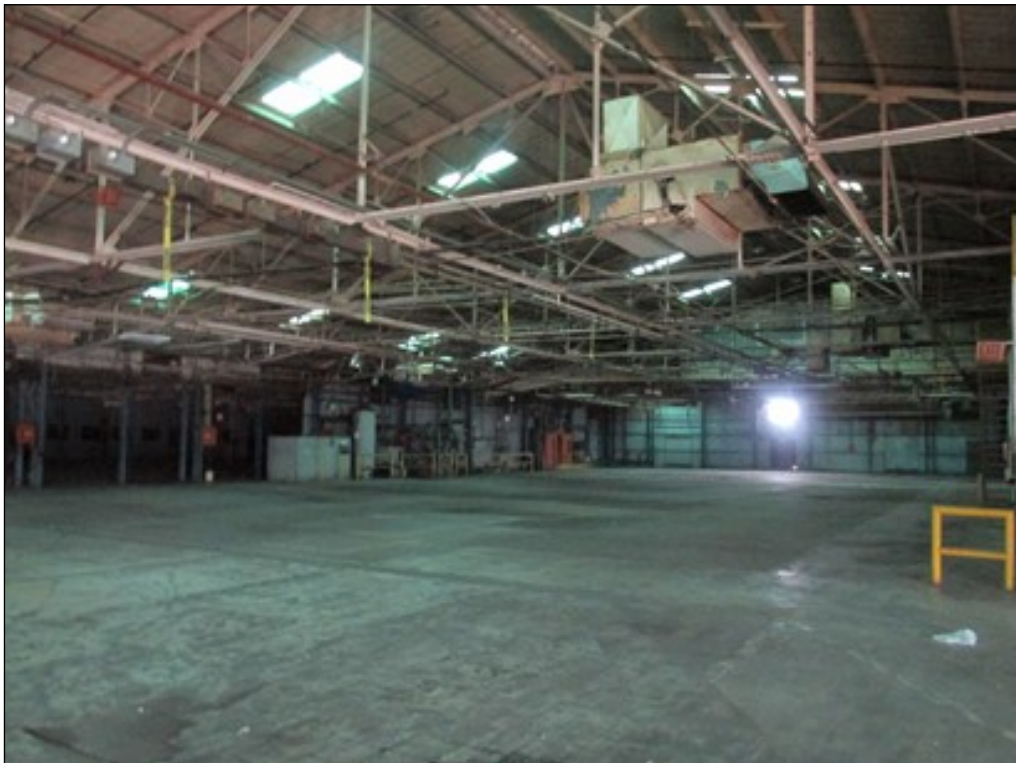
Note: Site acreage is approximate. Utility service information was provided by each respective provider.

Summary

The building at 421 Commerce Street is located in Ripley, east of US-51. It sits on a 50-acre property, which includes a pond that was built for stormwater retention. An approximately nine-acre open area, south of the building and west of the pond, could be available for new construction; however, utility maps show a water main passing through this area, which may complicate its development. Between the pond and Washington Street is another ten acres of open land. The focus of Austin's visit to the property was its building, for which ownership is seeking a new tenant.

The building is privately-owned and has been empty since a tenant vacated the space in early 2017. A driveway off Commerce Street brings traffic to two parking areas. A large parking area, west of the building, was unused during Austin's visit and has an asphalt surface that is in poor condition. Semi-tractor trailers were parked in the parking lot east of the building, from which Austin entered the building.

Seven dock doors and one drive-in door, all on the building's east side, open into an interior larger than 100,000 square feet. Though the interior space is big, it has lower clear heights than most modern manufacturer require, approximately 15 feet. Austin observed the concrete floor to be in poor condition. A second drive-in door on the building's south side opens towards the large, western parking lot with deteriorated asphalt.





Utilities

Ripley Power & Light provides electric and telecommunication service to 421 Commerce Street. The Walker East Substation, approximately 1.5 miles east of the site, has an excess capacity of 22.5 MW. Back-up electricity is available from the Jane Meadows Generation Plant. This plant is adjacent to the property and diesel-fueled.

A two-inch, high-pressure natural gas line in Commerce Street leaves the right-of-way, traveling cross-country along the northern portion of the property. Ripley Gas & Water is the building's natural gas provider.

A six-inch water line serves the property. The line travels away from the building's southeast corner and intersects a cross-country water line, which runs to Viar Avenue. The water treatment plant, owned and operated by Ripley Gas & Water, has adequate excess capacity to serve new industrial users. Three hydrants on the site provide water for fire suppression.

A six-inch gravity sewer main carries effluent from the southwest corner of the building towards Viar Avenue. Like the water treatment plant, Ripley Gas & Water's wastewater treatment plant has sufficient capacity to treat effluent from new industrial operations.

Conclusions

The Commerce Street property is near US-51 and large, both in acreage and building square footage. Still, it has little to offer companies seeking industrial space in Lauderdale County. This is especially true for companies that are not already present in the community. The condition of the building interior reflects poorly on the property, especially the cracked concrete floors and the paint chips that litter the ground. Exterior areas of the building also appear to be in disrepair. However, simply addressing deferred maintenance will not make the building competitive for private investment. Low ceiling heights hamper productive reuse for most businesses, which require higher spaces that fit modern machinery and equipment. Lastly, the stated lease price is the same per square foot as nearby buildings that are in better condition. Thus, a company can lease space in a higher-quality structure for the same price.

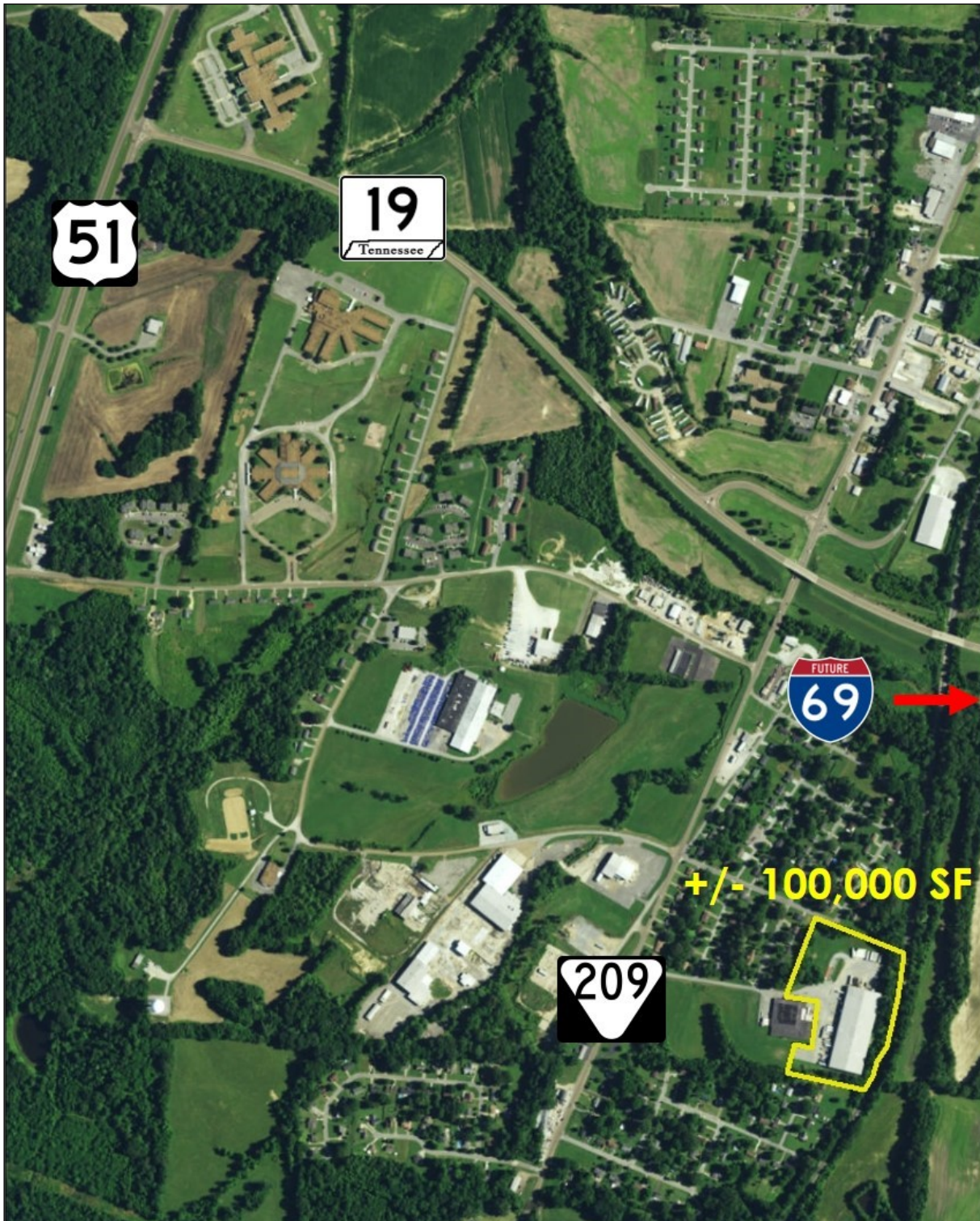
New construction on the property's available acreage may be possible, but it seems improbable. More than likely, businesses seeking land for new construction will be drawn to other greenfield sites in the county, especially to the Walker East Industrial Park, located less than one mile from the Commerce Street property. The property's role in the local economy may be limited, and geared towards surplus storage space for nearby businesses.

Recommendations/Next Steps

- Encourage the property's ownership to invest in improvements that will make the building more marketable to companies seeking existing space, specifically:
 - Remove paint chips from the building's floor and re-paint overhead areas to prevent further paint chips from falling
 - Repair and seal the building's concrete floor, which is cracked and broken in a number of places
 - Perform repairs to the parking lots that are on the building's west and east sides
- Air handling equipment appears to be past its useful night. Still, the cost of replacement may far exceed the cost of repairs.



Milton Avenue Building



MILTON AVENUE BUILDING	
General description	A vacant industrial building that abuts the Canadian National Railroad, currently used as a warehouse by its owner.
Total square footage	+/- 100,000 SF
Site Acreage	50 acres
Ownership	Private
Transportation access	0.2 miles east of TN-209, 1.4 miles east of US-51
Current zoning	Industrial
Utility Infrastructure	
Electricity	Ripley Power & Light
Natural gas	Ripley Gas & Water <ul style="list-style-type: none"> • 2-inch line
Water	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Wastewater	Ripley Gas & Water <ul style="list-style-type: none"> • 6-inch line
Asking price	\$2.25/SF
High level of assessment of potential environmental risks	Unknown

Note: Site acreage is approximate. Utility service information was provided by each respective provider.

Summary

A pre-fabricated, metal building at the eastern end of Milton Street was the final structure that Lauderdale County included in its PEP application. Approximately 1,000 feet east of Washington Street (TN-209), the Milton Avenue Building sits behind a one-story art-deco building, which was once a pants factory. The building is approximately one mile east of US-51, south of TN-19.



A small residential neighborhood surrounds the building to the north, south, and west. The building's eastern property line follows the Canadian National railroad, beyond which are trees and farmland. There is no direct access to the railroad from the site; however, the property owner indicated that a 1,600-foot spur could be constructed, to the railroad's standards, if a small property to the north were acquired. The building's western face has multiple dock doors and a drive-in door is also available on the building's north side.

The building's owner uses it to store recycled plastic, which is shipped from the building and manufactured into polyvinyl chloride (PVC) piping. The building's interior is large (100,000 square feet) and appears to be in good condition. It has 24-foot side walls with a clearance of 32-feet in the centermost part of the building. The concrete slab is said to be between six and nine-inches thick. Of the three buildings Austin visited, the Milton Street building was constructed most recently.



Utilities

Ripley Power & Light's Walker East Substation is approximately 1.5 miles from the site. It has an excess capacity of 22.5 MW, which could be increased to 60 MW upon the installation of a second transformer. In the event of an incident at the substation, a back-up generation plant (Jane Meadows) is less than one-half mile from the building.

Ripley Gas & Water operates a two-inch natural gas line up to the Milton Street property's western edge. It also provides water service to the building, which has been turned off by the owner due to lack of use. Once it is reactivated, the building will be served by to a six-inch water line that operates in the Milton Street right-of-way. The local water system has excess capacity to treat 2.4 million gallons of water per day.



Because previous uses in the building did not require wastewater infrastructure, the building has a nonoperational septic system that serves its small restroom facility. Should a new tenant require wastewater service, a six-inch line exists at the property boundary, roughly 500 feet from the building. Ripley Gas & Water's wastewater treatment plant has excess capacity to treat effluent from new industrial operations in Ripley.

Conclusions

Overall, the Milton Avenue building and its surrounding property are in good condition. To help it show better for prospective tenants, small piles of garbage and debris on the site should be relocated or disposed of. An interesting feature, that nearby buildings lack, is the prospect for rail service directly to the building. Canadian National requires that rail spurs be at least 1,600-feet long. This exceeds the length of the property, but, the acquisition of a triangular piece of land immediately to the north would, reportedly, create the necessary space for a spur. Still, it is unlikely that the building will ever be occupied by a rail-served business. The construction of rail infrastructure is expensive, so much so that an operation requiring rail service would seek a more ideal location.

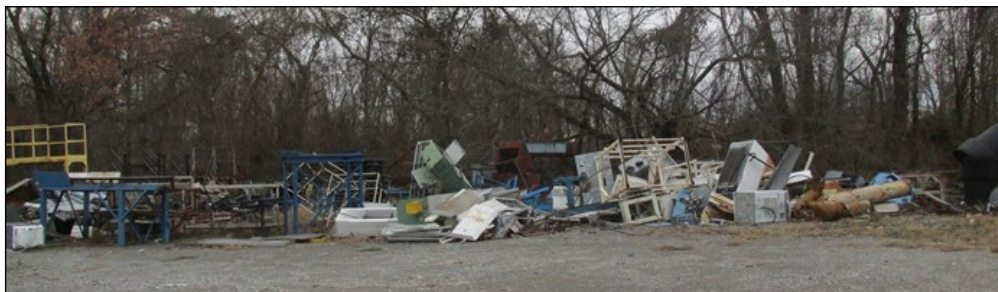
Though it is not a significant property deficiency, the building's lack of wastewater service may deter prospective companies. A lateral sewer line could easily be run to the building, and could probably be done at a reasonable cost. But, retrofitting the building interior for wastewater may be more expensive and time consuming, and could require alterations to the building's concrete floor. If the building's owners are eager to attract a business into the structure from outside of the region, it may consider bearing this cost upfront and connecting the building to the local wastewater system. At minimum secure an accurate cost estimate and schedule for extending service to the building. This cost should be qualified, since the septic system has not been in operation in a few years, it may or may not be to code and may need to be abandoned.

Another deficiency of the building is its proximity near occupied residences. The building has an industrial zoning designation, which allows for many types of manufacturing operations to take place in it. However, persistent, heavy industrial traffic may frustrate nearby residents and become problematic for a business operating out of the space. For that reason, a prospect may opt to locate elsewhere.

Despite its good condition, the Milton Avenue Building should not be a pillar of Lauderdale County's economic development strategy. It is well-suited for storage uses, as observed by Austin during its tour, especially given its current utility shortcomings. It could also be appealing to uses by businesses currently operating in and around Ripley. But, the probability of the building landing a company, particularly one from outside of Lauderdale County, is unlikely in a competitive economic development climate.

Recommendations/Next Steps

- Because the current owner is using the building as storage space, obtain information, in writing, explaining how quickly the space could be vacated and occupied by an interested party.
- To increase interest in the structure from prospective companies, connect the building to the municipal wastewater system. Wastewater infrastructure is at the property line, in the Milton Avenue right-of-way.
- Remove piled debris located to the building's north, as it would be a distracted for prospective building occupants.



Highway 210 North Site



HIGHWAY 210 NORTH SITE	
General description	Farmland bisected by a stream, near an airport runway
Total acreage	+/- 50 acres
Available developable acreage	+/- 23 acres (estimated)
Ownership	Private
Topography	Flat, agricultural land
Transportation access	TN-210 north of Halls, 2.0 miles east of US-51
Current zoning	Farming
Utility Infrastructure	
Electricity	Ripley Power & Light
Natural gas	Town of Halls 2-inch line
Water	Town of Halls 4-inch line
Wastewater	Town of Halls 8-inch line
Asking price	\$5,000-\$10,000/acre
High level of assessment of potential environmental risks	Unknown

Note: Site acreage is approximate. Utility service information was provided by each respective provider.

Summary

The Highway 210 North Site is a 50-acre property, north of Halls and immediately adjacent to Arnold Field (formerly known as the Dyersburg Army Airbase). The site is in northeast Lauderdale County, near the South Fork Deer Forked River. TN-210 runs along the property's eastern edge, with the Canadian National railroad running north-south, parallel to the road on its eastern side. During Austin's visit, it appeared that the site is used as farmland.



A cluster of trees cuts through the site, separating a roughly nine-acre portion from the remainder of the property. By all accounts, the tree line coincides with a stream. If this is the case, the site would be undevelopable at and near the waterway. The nine-acre, southern portion of the site is large enough to locate a small industrial building; however, additional factors may limit this area's development.

A scrapping operation lies immediately north of the property, substantially diminishing the appeal of the Highway 210 North Site. Many companies that seek greenfield locations for new operations expect that a new building will reflect positively on its corporate image. A location next to a scrapyard, therefore, would be distracting. The scrapyard could be made less obvious through a number of measures. For example, many communities enforce screening requirements and limitations to the heights of piles through zoning codes. In all likelihood, this business is well-run and valuable to the community. Still, it is not a land use that most businesses would want next door to their investment.



The site's location, immediately south of the Arnold Field runway, may be a significant hurdle to development. Federal Administration Aviation (FAA) regulations control building heights around airports, especially on approaches to runways, where planes are at low altitudes during ascent and descent. FAA regulations establish a conical area that expands outward from the edge of runways, with the standard being that planes require at least one foot of elevation for every 20 feet traveled away from a runway edge. Austin approximated the shape of a 2,000-foot cone from the end of the Arnold Field runway, as depicted in the previous image. As the map shows, approximately half of the site, south of the stream, lies within a regulated flight path. This reduces the nine-acre developable area to under five acres, too small for most industrial prospects.

Likewise, the area north of the stream may be affected by airport operations. Austin estimates that the area north of the stream that is likely to be free from FAA restrictions, to be approximately 23 acres in size. Austin considers this to be the site's true developable acreage.

Utilities

Ripley Power & Light provides electric service to the Highway 210 North Site from its Tupperware Substation, located 2.8 miles from the site, and south of Halls. The substation has adequate capacity to serve new customers, up to 13 MW. This capacity exceeds demands for most users locating on similarly-sized sites. The Halls Backup Substation has a 20 MW capacity and operates as a redundant power source in the event of disruptions at the Tupperware Substation.

Natural gas, water, and wastewater service at the site come from the Town of Halls. Halls has a two-inch, polyethylene natural gas line in the TN-210 right-of-way, adjacent to the site. It operates at 30 psi. A high-pressure line, operating at 150 psi, is nearby on Entrance Road.

A four-inch line is at the site in TN-210 right-of-way. The Town of Halls Water Treatment Plant is permitted to treat 1.5 million gallons of water per day, with an excess capacity of 1.05 million gallons per day.

The Halls Wastewater Treatment Plant is designed to treat one million gallons of effluent per day, yet only treats 300,000 gallons typically. The plant is 1,250 feet due east of the site and has excess capacity to accept increased effluent from new businesses.

Conclusions

The Highway 210 North Site has the acreage and utility connectivity required for industrial development. Nevertheless, it is improbable that the site will successfully attract industrial investment to Lauderdale County. First, a stream divides the property into two, mutually-exclusive sites. Theoretically, either portion could be developed independent of the other, but the stream obstructs any possibility for one, all-encompassing project on the site.

Second, any near-term prospect that is considering a location in Halls will be drawn to the nearby Halls Industrial Site. Grading and other improvements have made that site development ready, whereas the Highway 210 North Site would require similar pre-development work to ready it for construction.

The site is directly opposite TN-210 from the Canadian National railroad. Connecting the site to the railroad would require either the construction of a new switch or the reactivation of a switch to the south. Under either scenario, the railroad would be reluctant to support rail service on this site, because it would require vehicular traffic to cross the spur, along TN-210, at grade. Additionally, slow-moving trains blocking traffic could adversely impact nearby industries.



As mentioned previously, the site's location, adjacent to an active runway, is a significant challenge. Portions of the site within airport flight paths are, more than likely, subject to restrictions that either limit building height or preclude development all together. As a result, the developable portion lying north of the stream is reduced (as estimated by Austin) to be 23 acres in size. The site's pentagonal shape would make building placement difficult.

Finally, the site being adjacent to a scrapping operation is a significant obstacle to attracting new industrial development. Even if the airport (FAA) concern did not exist, the scrapyards is a non-starter for site selectors and corporate decision makers.

Although the site is not an ideal location to focus efforts to attract industrial investment into Lauderdale County, it can be a candidate for local investment. Businesses in and near Lauderdale County, seeking land on which they can expand, may value the site's flat topography and relative proximity to public utility infrastructure. Potential uses on the site include heavy manufacturing, as well as fabrication that requires outside storage. However, industry on this site must be able to operate in lower-height structures, due to the property's proximity to an active runway.

In conclusion, it is highly unlikely that the Highway 210 North Site will attract private investment from outside of the region. Allocating public dollars towards site improvements and advertising it as a centerpiece of Lauderdale County's economic development strategy would be unwise.

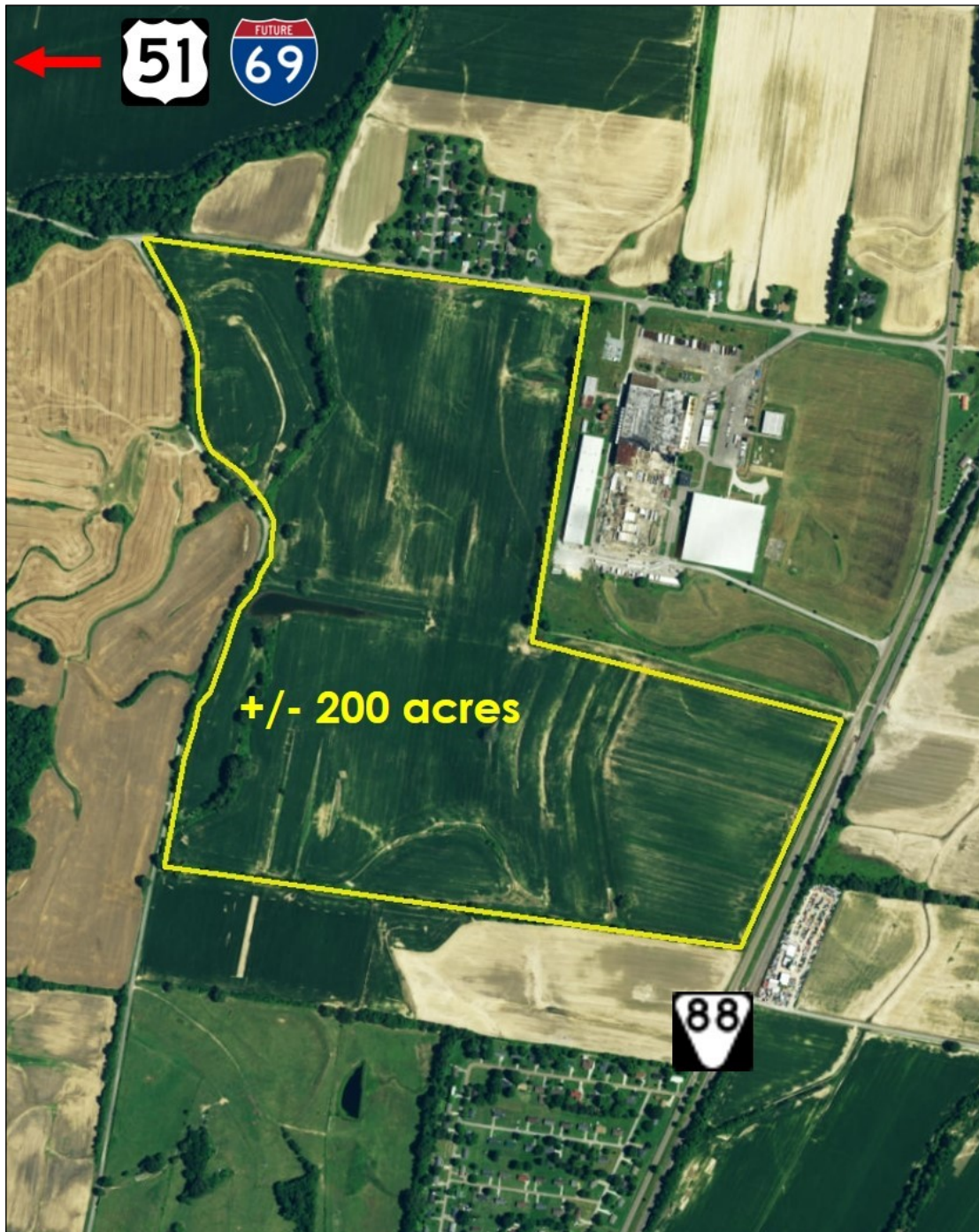
Recommendations/Next Steps

Austin does not believe this to be a competitive site for industrial development, due to its:

- Location at the end of a runway;
- Being adjacent to a scrapping operation; and
- Location within sight of the Halls Industrial Park, which is in the process of becoming a *Select Tennessee Certified Site*.



Tupperware Site



TUPPERWARE SITE	
General description	A large and L-shaped area of farmland; topography slopes away from the road and gives way to gently-sloping farmland
Total acreage	+/- 200 acres
Available developable acreage	TBD
Ownership	Private
Topography	Sloped
Transportation access	TN-88, 1.5 miles east of US-51
Current zoning	Light-industrial / residential
Utility Infrastructure	
Electricity	Ripley Power & Light
Natural gas	Town of Halls <ul style="list-style-type: none"> • 2-inch line
Water	Town of Halls <ul style="list-style-type: none"> • 8-inch line
Wastewater	Town of Halls <ul style="list-style-type: none"> • 8-inch line
Asking price	\$5,000-\$10,000/acre
High level of assessment of potential environmental risks	Unknown

Note: Site acreage is approximate. Utility service information was provided by each respective provider.

Summary

This site is a large, L-shaped piece of farmland that borders a property with a former Tupperware manufacturing plant. Therefore, this site's name is a reference to its neighboring property, and not to a former occupant. The site is located between the towns of Halls and Gates on TN-88, which is a continuation of TN-209 north of Gates. The site lies approximately 1.5 miles east of US-51, Lauderdale County's primary north-south corridor. Additionally, the Canadian National railroad main line lies directly across TN-88 from the site. An inactive rail spur, which formerly served the Tupperware plant, remains, with the switch, in place; the town has an easement that protects it from being removed by the owner of the property it crosses. The switch connecting the spur to the main line remains, however, improvements would be needed to make it operational.



The site slopes upward, away from TN-88, at a grade less than 2.5 percent. The portion of the property lying parallel to TN-88, which is 40 feet higher than the highway, is substantial in size and consists of gently rolling farmland. It crests in the center before dropping in elevation towards Dave Walker Road to the west and Beech Bluff Cemetery Road to the north. Austin's visit occurred after a rain event. Though the site was muddy, no areas of standing water were observed, and the site appeared to drain well.

The site has frontage along three public roadways. An unpaved access road travels towards the site's center, west from TN-88. Still, in order for Austin to tour the site, a pick-up truck was required. Adjacent to the site, on Beech Bluff Cemetery Road, is an electric substation, which was built to serve the now-closed Tupperware plant and now functions far below its designed capacity. Apart from the former Tupperware facility, which is northeast of the property, the only non-farm land uses near the property are two residential streets, north of Beech Bluff Cemetery Road.

The Town of Halls has secured this site for potential development with a five-year option. The option agreement allows for a five-year renewal period upon expiration.

Utilities

The Tupperware site has connectivity to three public utility systems: electric, water, and wastewater. Ripley Power & Light serves the site from its Tupperware substation, located immediately adjacent to the property. The substation's proximity would provide superior power service for any user who would locate on this site. Typically, power failures are the result of downed distribution lines between substations and customers; having a substation adjacent to a user significantly reduces the likelihood of a power outage. According to electric officials, the substation has a design capacity of 20 MW, of which only seven megawatts are used on an average day. A 13 MW excess capacity is sufficient to supply substantial electricity users. Additionally, the Halls Backup Substation, also with a 20 MW capacity, is designed to be a redundant source of energy in the event of a failure at the Tupperware Substation.



An eight-inch water line approaches the site on Beech Bluff Cemetery Road, ending at the electric substation's property, immediately to the site's east. Halls's water treatment plant has excess capacity to treat 1.05 million gallons of water per day.

Two wastewater lines serve the Tupperware site. An eight-inch gravity line, which predominately serves houses north of the property, flows towards TN-88 from the intersection of Beech Bluff Cemetery Road and Jan Street (labeled as Craddock Street in Google Maps). Along TN-88, a six-inch force main, which travels north from Gates, continues northward and through Halls towards the wastewater treatment plant. A pump station across from the Old Tupperware property receives flow from existing industrial buildings. The wastewater treatment plant has capacity to treat an additional 700,000 gallons of effluent per day.

Natural gas approaches the site's northernmost portion along Beech Bluff Cemetery Road. This line originates in Halls, traveling south on TN-88 before turning west towards the site to serve nearby residences. Natural gas infrastructure does not continue south on TN-88. Therefore, there is no natural gas service at the rail-served portion of the site. A natural gas line from Halls turns westward, with a two-inch line traveling along Beech Bluff Cemetery Road. No natural gas infrastructure lies within the TN-88 right-of-way between Beech Bluff Cemetery Road and the town of Gates, directly in front of the site.

Conclusions

The Tupperware Site is a viable prospect for industrial development in the mid to long-term. This is particularly true for future location prospects in need of rail service. The cost to implement rail service at this site would be far lower than the cost to implement rail at other sites in Lauderdale County, especially at the Walker East site in Ripley. The Tupperware Substation has excess capacity to serve additional industrial customers, who would receive very reliable electricity, because the length of service lines between the substation and the site is effectively zero.



The creation of a building pad would require grading work on site; however, the gently rolling topography may lend itself well to cut-and-fill grading work, through which soil is moved from a site's higher points to its lower points, to create a flat topography. The site is a modest distance from US-51, accessible for industrial traffic by traveling through Gates or Halls, and is also relatively close to the proposed alignment for Interstate 69.



The Tupperware Site's status as a rail-served site is not guaranteed into the future. According to Canadian National officials, all rail switches must be inspected at least once a month, creating a substantial financial burden on the railroad when switches go unused. Canadian National has expressed its opinion that the switch, which would connect the site to the railroad's main line, should be removed. If this were to occur, the reinstallation of the switch would be expensive and time consuming. What is more, the railroad may not approve of the switch's reinstallation, because at-grade railroad crossings near switches, as is the case on TN-88, are no longer favored for safety reasons. According to local leaders, Canadian National agreed to delay the switch's removal by one year while a development plan for the Tupperware site is finalized.

The likelihood of industrial development on the Tupperware Site within a year is very low. Therefore, Lauderdale County must be able to demonstrate to Canadian National that it is making a best-faith effort to prepare the property for development. Lauderdale County may accomplish this by beginning to conduct due diligence on the site. In fact, due diligence on the site is important regardless of the site's ability to attract a rail-served business. Another way to demonstrate the community's commitment to Canadian National would be to allocate funds to perform maintenance on the rail spur between the switch and its western terminus.

Recommendations/Next Steps

- The site's name is misleading, referring to a neighboring property's former occupant and not to the site itself. In marketing materials for the site, consider renaming the property.
- Commence due diligence studies of the site in order to determine the area of the site, if any, that are not suitable for development
- As a sign of good faith, share due diligence findings with Canadian National, thereby showing that efforts are underway to explore rail-served development on the site



COMMUNITY OBSERVATIONS & RECOMMENDATIONS

Strategies undertaken to create a more stable economy must incorporate a wide range of actions that collectively improve the likelihood of achieving economic sustainability. Efforts to ready industrial sites and buildings for job creating investments are central to success. The primary purpose of PEP is to focus on outlining actions that Lauderdale County stakeholders can undertake to ready sites and buildings.

The need to ready real estate aside, other community offerings are equally impactful in positioning the county for economy shifting investments. Site selectors and corporate managers examine location alternatives through factors that measure a community's ability to meet corporate operating requirements. Considerations common to all types of location selection projects are the following:

- Workforce: Are there enough workers with the right skills and work ethic to support my business?
- Education: Is the education system adept at producing graduates that have skills aligned with a rapidly changing global economy?
- Infrastructure: Does the community have modern transportation and utility infrastructure with capacities that exceed near term needs?
- Quality of Place: Has the community invested to ensure it is meeting the safety, health, and welfare needs of its citizens?
- Economic Development Strategy: Do stakeholders invest sufficient time and money to understand community strengths and weaknesses and develop actions that yield an alignment with investment opportunities?

The Community Recommendations section is a high-level assessment of Lauderdale County non-real estate attributes relative to corporate decision maker expectations. Recommended actions are offered that, if taken, can enhance the county's investment attractiveness. These insights were developed by the Austin team during the PEP project. This is by no means a comprehensive list, but is meant to raise awareness to the fact that investment attraction requires actions on many fronts.

Ripley Square: When analyzing communities as locations for potential investment, many companies consider the aesthetic of the community and the likelihood that skilled workers, managers especially, would be eager to live and work there. Downtown Ripley has a charm that reflects well on the community and leaves a positive impression. Curbs and landscaping slow cars and create a positive experience for pedestrians. During Austin's visit, the square had been decorated for Christmas, further enhancing its charm. Ripley may consider helping a small restaurant or coffee shop to open on the square, which could be used as a showcase stop during visits by site selectors and prospective companies. Beyond the square, improvements to Washington Street towards the local high school show that the community is

committed to capital investments that enhance quality of life. In summary, the community shows well and does not appear to be the seat of a distressed county.

Second Chance Job Fair: Throughout the United States, local economies are affected by individuals with recurrent challenges to finding employment. For example, people can have legal barriers to employment due to past interaction with the justice system, or they can have difficulties getting to work due to a lack of reliable transportation. During Austin's site visit, officials described the county's Second Chance Job Fair, through which government offices and local agencies attempt to remove barriers that keep residents unemployed. Few communities make proactive efforts, such as this, to resolve fundamental issues that have largescale economic effects. This reflects very well on the community and leaves the impression that Lauderdale County leaders can both recognize and address problems that a company could face.



During its visit to Lauderdale County, Austin saw a community that is taking proactive steps to boost its attractiveness for investment. When corporations and site selectors make major location decisions, cost-of-business and the availability of labor are primary considerations. Unfortunately, it is difficult for cities and counties to affect these directly. But, qualitative aspects of a community, such as updated public spaces and engaged community leaders, are important factors that can draw distinctions between two sites in different communities, which are otherwise identical. Lauderdale County should continue to view these types of projects and this level of service as important parts of its overall economic development strategy.

CONCLUDING REMARKS

The purpose of this Select Tennessee Property Evaluation Program (PEP) report is to provide Lauderdale County, and its stakeholders with an impartial, outsider's perspective into the available real estate and associated economic development opportunities available for current and future industrial development. The goal is that stakeholders will use these insights to focus local resources to ready properties that may have the greatest potential for business attraction.

Land owners and other interested parties may favor one property over another. This process will undoubtedly cause certain properties to be elevated and shown to prospective clients and consultants during the site selection process and that is to be expected. However, based on decades of work in site selection for corporate clients, representatives of Austin Consulting believe the recommendations contained in this report provide important insights for Lauderdale County to move forward and pursue industrial prospects.

It has been a pleasure to work with Lauderdale County on this project. The study has provided Austin with a unique opportunity to learn more about the area's substantial assets, as well as its business development efforts.

APPENDIX A – Summary of *FUNDAMENTAL ECONOMIC ANALYSIS*

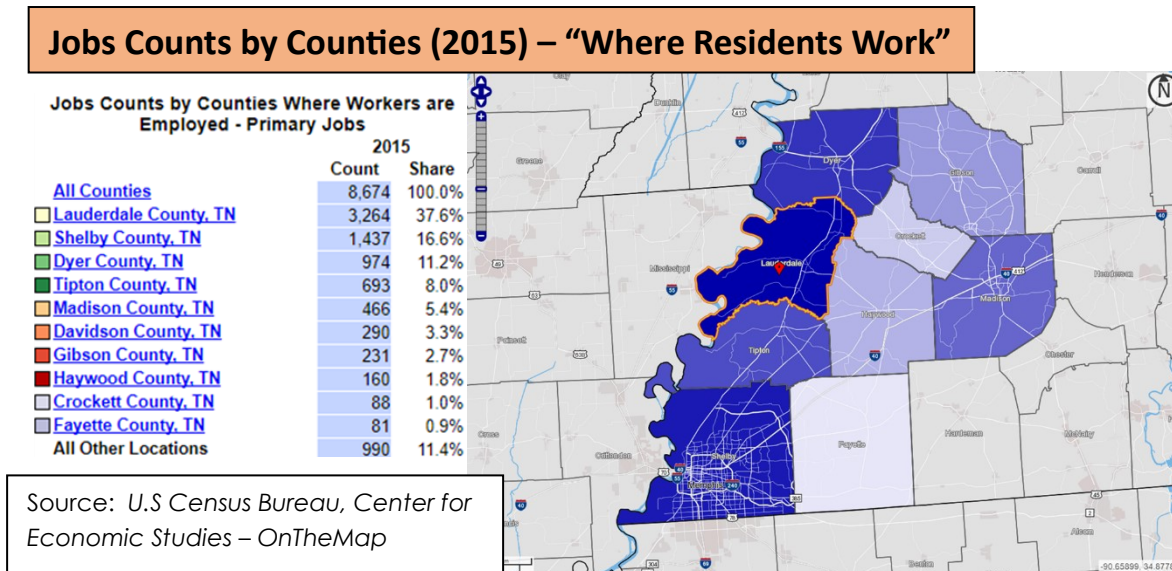
Conducting a fundamental economic analysis (FEA) on Lauderdale County will help to lay the ground work for recommendations to the community.

The information in the FEA includes many of the data points that site selectors look at during a desktop review, before visiting a community on a project. Information of this kind is valuable because it is educational for Austin, giving the consulting team a much deeper level of understanding of the community before a visit.

The FEA examines four separate categories of measurement used by site selectors: regional commuting patterns, county demographics, county workforce, and industry sector/wage analysis. A summary of each is described below, while the full analysis is contained in *Appendix B: Fundamental Economic Analysis*.

Regional Commuting Patterns

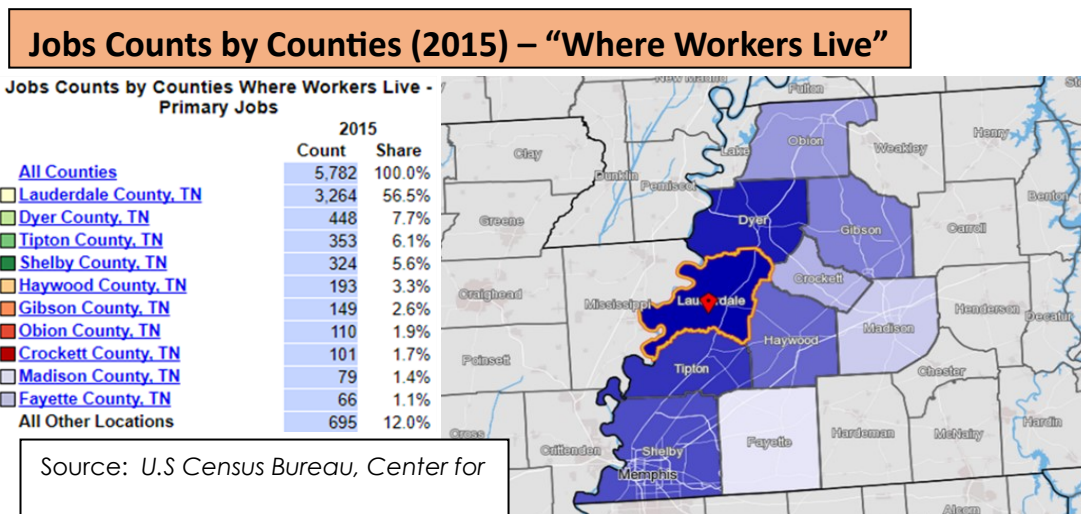
Certifying that local employers can attract and retain qualified workers is often the focus of location selection projects. Important components for assessing workforce availability are the commuting patterns of workers within and between communities.



The map above shows commuting patterns for Lauderdale County residents in 2015, the most recent year available. According to the U.S. Census Bureau data, 5,410 Lauderdale County residents left the county for employment. With 3,264 workers having both lived and worked within the county, this means that 62.4 percent of Lauderdale County's resident workforce left the county each day.

These data reveal a seemingly captive audience for new job opportunities in the county, those who would gladly trade a long commute for a shorter one. Emphasizing this group of residents may bolster business attraction efforts and benefit Lauderdale County.

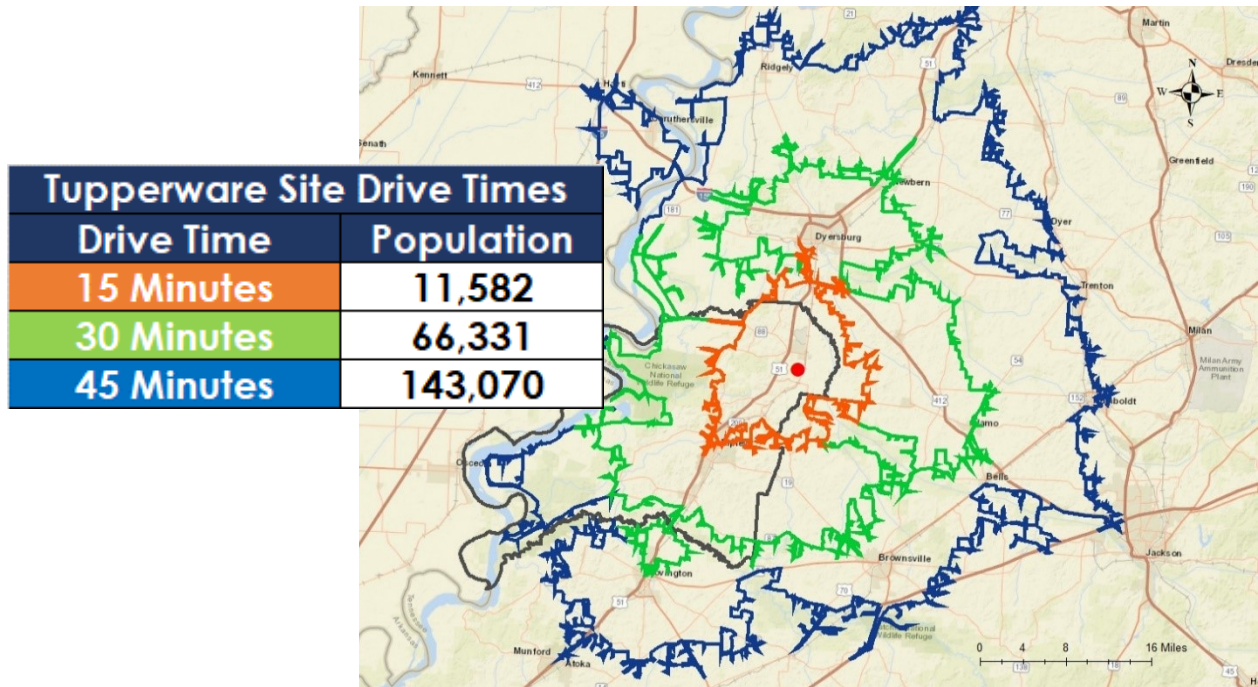
Though many Lauderdale residents commuted to Shelby County and Dyer County, according to 2015 data, far fewer commuted in the opposite direction, into Lauderdale County. In short, Lauderdale County is a net exporter of labor.



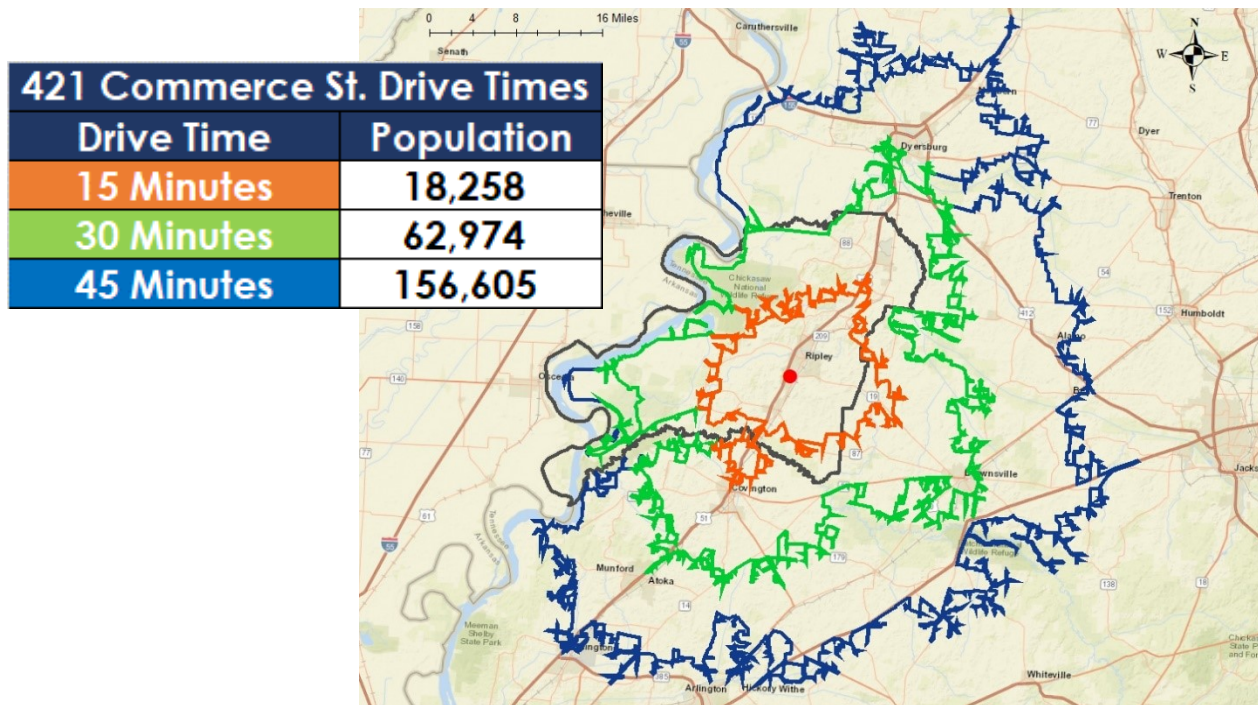
The map (above) shows the counties in which Lauderdale County workers resided. Over half of Lauderdale's workforce worked and lived in the county, with the counties of Dyer, Tipton, and Shelby being the largest contributors to Lauderdale County's non-resident workforce.

The drive time maps on the following page show the number of people living within 15, 30, and 45 minutes of two Lauderdale County sites: 421 Commerce Street in Ripley and the Tupperware site near Halls. Often, drive time maps will reveal that a site, which appears to be less competitive for industrial investment, has a high drive time population. This revelation can upend thinking and redirect development efforts. Because of its location between two population centers, Memphis and Dyersburg, sites in Lauderdale County have comparable drive time populations. In a way, this removes population considerations from the county's economic development strategy, allowing leaders to place a stronger focus on the general developability of a site, as well as the investments at the site that are needed to increase its appeal to prospective industry.

The maps show comparable drive time populations between 421 Commerce Street (and the other properties in Ripley) and the Tupperware site (as well as the North Highway 210 Site). Northern Lauderdale County has a higher 30-minute drive time population because of its location near Dyersburg. However, Ripley and southern Lauderdale County have a larger 45-minute drive time population, being able to draw workers from Tipton County and northern Shelby County. Given this information, there is no strategic reason to prioritize industrial development in one area of the county over another, based upon commuter sheds alone. This allows Lauderdale County to have greater flexibility in its decision making as well as an argument that the county is well-positioned to attract skilled labor from across West Tennessee.



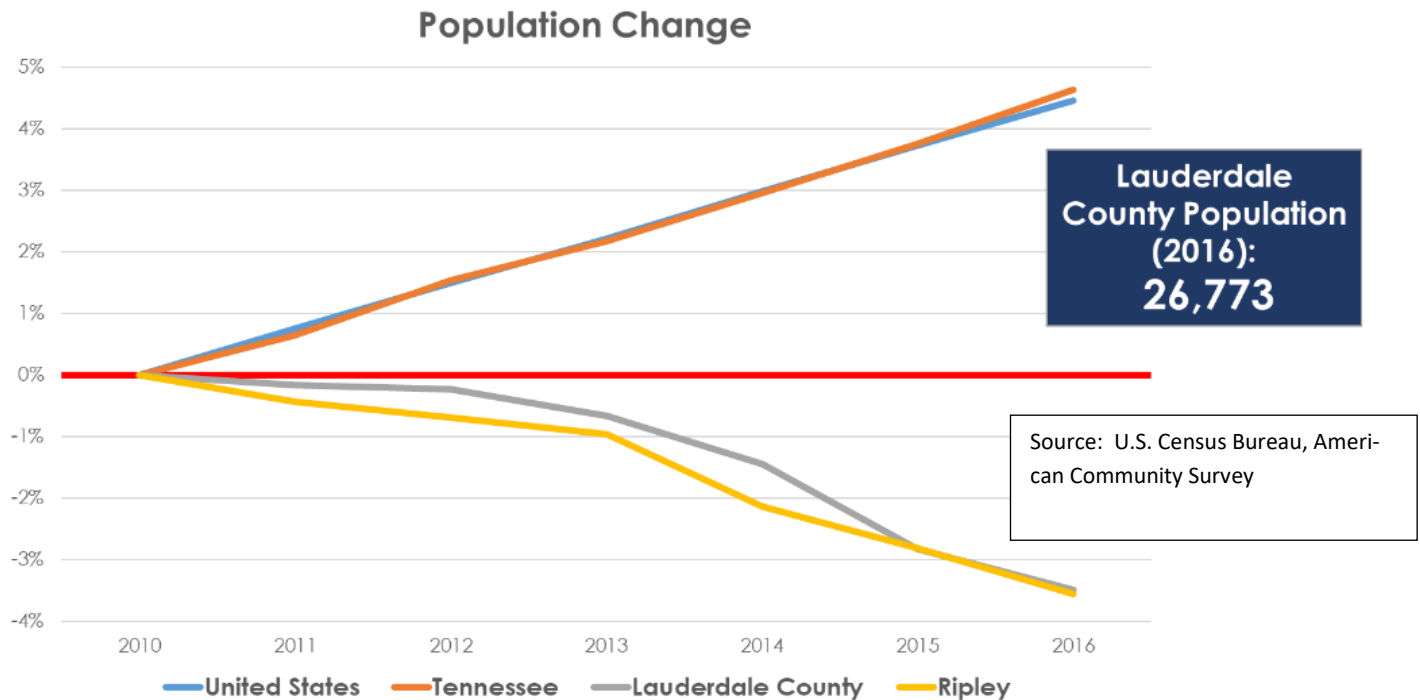
Source: ESRI Business Analyst, U.S. Census Bureau – Tigerline Files



Source: ESRI Business Analyst, U.S. Census Bureau – Tigerline Files

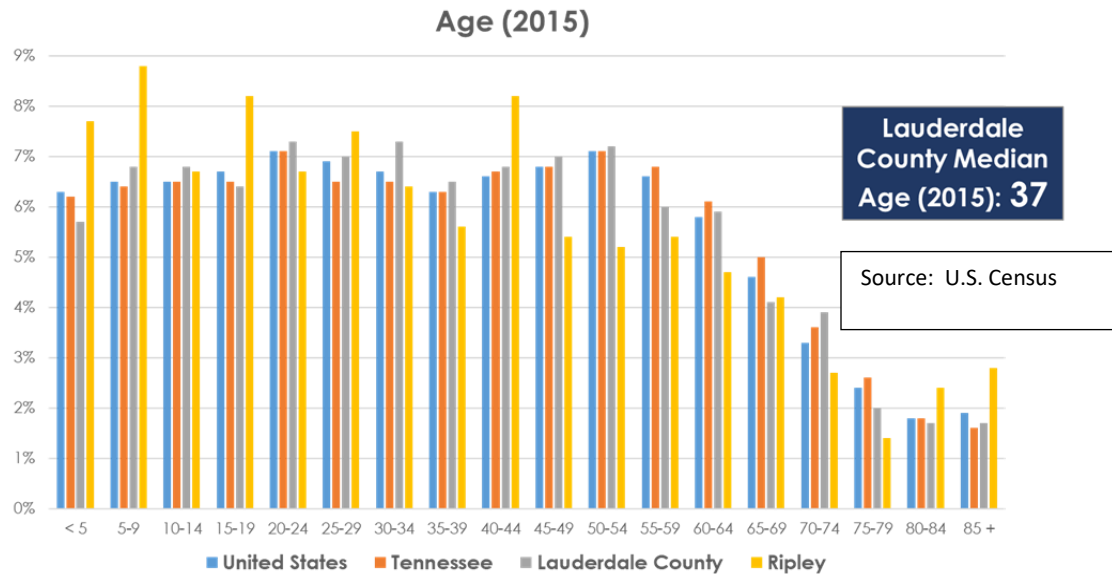
County Demographics

The populations of Lauderdale County and Ripley are projected to have declined since the 2010 Census. According to the Census's American Community Survey, Tennessee and the United States have each experienced five percent population growth. However, the county and city each saw a population decline of approximately 3.5 percent.

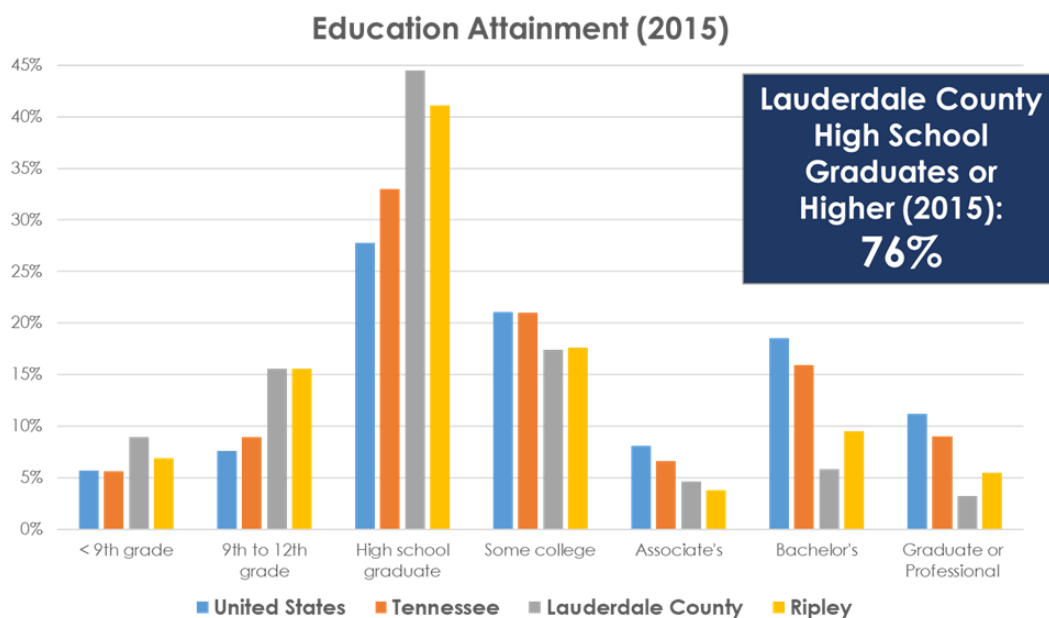


Population and the age groups of a community are carefully looked at by site selectors to understand the workforce at a deeper level. Site selectors need to understand whether the community is losing or gaining workers and to see if the community is effectively replacing workers that are retiring. Of specific significance are workers in the prime age group of 25-45 years. Unlike many rural counties, the percentage of Lauderdale County residents that fall in this age group slightly exceeds the percentage for the State of Tennessee. To a site selector, this suggests that Lauderdale County is successfully retaining its youth. But, Census data do not easily distinguish between those who are incarcerated and those who are not, meaning that the employable population may be smaller than it appears to be, because of the West Tennessee State Penitentiary in southwestern Lauderdale County.

Other demographics that site selectors look at include educational attainment, household income, and home values. In Lauderdale County, these categories rank lower than the U.S. and the rest of the state. However, low home values paired with low household incomes indicate an overall lower cost of living in the community, which is an attractive trait for residents, both current and potential. The county should certainly market its lower cost of living as an advantage in an attempt to attract new residents and businesses.



Initially, the lower educational attainment rate in Lauderdale County is concerning. Overall, Lauderdale County has a high school (or higher) completion rate of 75.1% percent. When a county has lower-than-average levels of educational attainment, it is useful to isolate younger workers. Often, younger workers show levels of educational attainment close to national averages, because schools have emphasized the growing importance of education throughout the modern economy. But, the percentage of 18 to 44-year old residents in Lauderdale County that have completed at least high school is only marginally higher than the percentage for all county residents. In all likelihood, this data point is also skewed by inmates at the West Tennessee State Penitentiary. In fact, when statistics for younger women are isolated, a marked improvement is seen in levels of educational attainment. This is relevant because the penitentiary is predominately male.



Source: U.S. Census Bureau, American Community Survey

County Workforce

Employment mix by industry reflects a community's economic structure. Site selectors look for the mix that best aligns with a client's operational needs. For example, companies engaged in manufacturing are drawn to communities with higher than average manufacturing employment. If a company's focus is health care, then health care employment rises in importance.

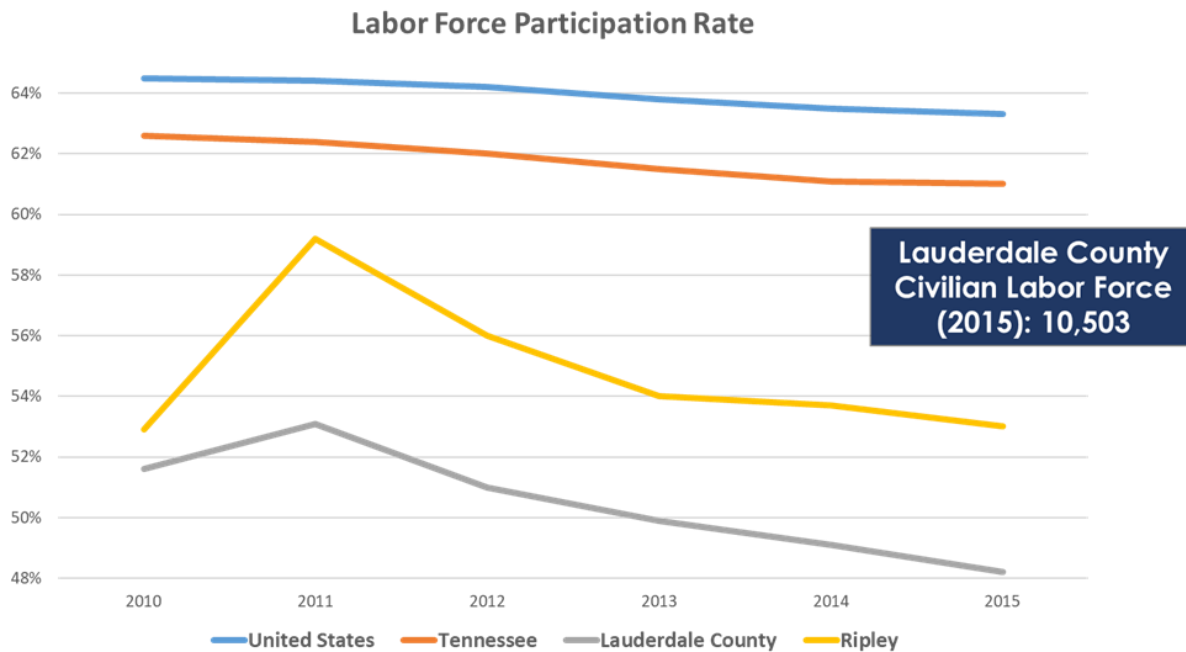
County workforce data show employment concentrations in agriculture and healthcare. According to the Bureau of Labor Statistics, 17 percent of the county's 2016 employment was in manufacturing, six percent higher than Tennessee and nine percent higher than the United States. The largest sector in Lauderdale County, by employment, is government at 29 percent. This figure includes employment at the West Tennessee State Penitentiary.

Data predict a decline in manufacturing employment of 20 percent between 2016 and 2026. However, the foundation of these data projections is the previous ten-year period (2006-2016), during which manufacturing employment declined in the county. Locating a manufacturer in the county could result in employment projections being false.

To remain competitive for manufacturers, Lauderdale County must ensure that its workforce is competitive for jobs that are increasingly skilled and dependent upon specialized training. It can accomplish this by supporting vocational programs and working with employers to better anticipate job skills that are, or will become, in demand. Additionally, Lauderdale County can continue to undertake efforts to help its residents, who have difficulties obtaining employment due to barriers such as transportation or criminal records, be prepared for employment. These efforts are commendable and reflect well on Lauderdale County leadership.

Site selectors use two workforce measures to evaluate communities, the *labor force participation rate* and the *unemployment rate*. To differentiate between these measures, one must understand who is and who is not in the labor force. The retired, many with disabilities, and stay-at-home parents are examples of people who are not in the labor force; they are neither working nor seeking to work. The labor force consists of two groups, the employed and the unemployed. The unemployed labor force, measured by the *unemployment rate*, are people with no job who are actively seeking to work.

The 2016 labor force participation rate in Lauderdale County was 48.2 percent, meaning that a majority of the adult population available to work is absent from the labor force (neither employed nor unemployed). This rate is 15.1 percent lower than the national participation rate and 12.8 percent lower than the state participation rate, according to the U.S. Census Bureau. This is a significant problem for industrial recruitment efforts. To site selectors, a lower than average labor force participation rate can suggest that a high number of adults, who are physically able to work, but unable to find employment, have stopped looking for a job and have exited the labor force entirely. But, the true source of this statistic may be a higher-than-average proportion of people who are of retirement age or receiving disability. These facts would need to be clarified to site selectors and prospective industry, as applicable, to mitigate negative perceptions.



Industry Sector & Wage Analysis

County workforce data represent a moment in time, allowing site selectors to understand who is working and in which industries they are employed. Site selectors use industry sector and wage data to understand broader economic trends. For example, a sector may have high employment today, but projections may show employment decreasing in the future. Or, industry sectors not being targeted may be ripe for wage growth. By considering these data broadly, one can begin to understand how a county's economy is structured and how that structure may change.

According to available data, the employment sectors in which Lauderdale County is most competitive are government and utilities. Supporting these sectors should be an important part of the county's economic development efforts. Employment in agriculture and manufacturing exceed state averages, but declines in these sectors between 2006 and 2016 are projected to continue into the future. A sector that gained jobs between 2006 and 2016, and is anticipated to grow further, is transportation. The construction of Interstate 69 through the county, likely, would result in growth beyond expectations.

There are many correctional officers and jailers in the county, because of the West Tennessee State Penitentiary in Henning. These positions require a high school diploma or equivalent. The presence of the prison may make industrial recruitment efforts problematic for Lauderdale County. Because the prison offers steady employment and competitive benefits, companies may be concerned that workers would leave in favor of public sector jobs, resulting in ongoing labor challenges. This may affect the county's ability to attract businesses to buildings in need of repair, because these operations are likely to pay lower wages that are less appealing than available correctional jobs.

Still, there are employment opportunities for Lauderdale County residents that out-pay the penitentiary. For example, with a postsecondary, non-degree award, residents can become heavy and tractor-trailer truck drivers. These jobs are in a growing industry that pays wages, on average, \$4.39 more an hour than correctional positions.

It is important to note that economic data are not released in real-time and that sudden improvements in local economies are reflected in future data releases. To this end, Lauderdale County's economic data could be altered dramatically should a major employer locate in the county in the near future. Lauderdale County's economic strategy must be developed at the local level. Additionally, it should be flexible and adapt to changes in the local economy.

Recommendations for Strengthening the Lauderdale County Economy

- a. When promoting Lauderdale County for business investment, highlight the following:
 - b. Lauderdale County is able to attract a skilled workforce from communities in every direction, except to the west, due to the Mississippi River.
 - c. If an employment opportunity of similar skill became available within Lauderdale County, many residents now leaving the county for work would be willing to take the local position, even if it offered a slightly lower wage rate.
2. Issues to work on to improve Lauderdale County's competitiveness position:
 - a. The county's low labor force participation rate suggests that a number of residents have left the workforce. Community leaders should make concerted effort to get these disaffected residents back into jobs, even if just part-time. If labor force participation is low because of a high number of residents are not eligible to work, frame this argument strategically to prospective employers. The Second Chance Job Fair initiative is an excellent example of the county's efforts to improve its workforce competitiveness.
 - b. In demographic analyses, Lauderdale County's population appears young, compared to many rural Tennessee counties. But, not all of these workers are eligible to work, because they are incarcerated at a state facility located in the county.
 - c. Like many smaller communities, the task of attracting industrial investment from new employers locating into the community is challenging. Therefore, a concerted effort should be made to keep their existing employment base competitive, primarily through workforce initiatives.

APPENDIX B

Select Tennessee Property Evaluation Program *Fundamental Economic Analysis* for Lauderdale County, TN



ROAD MAP

PURPOSE

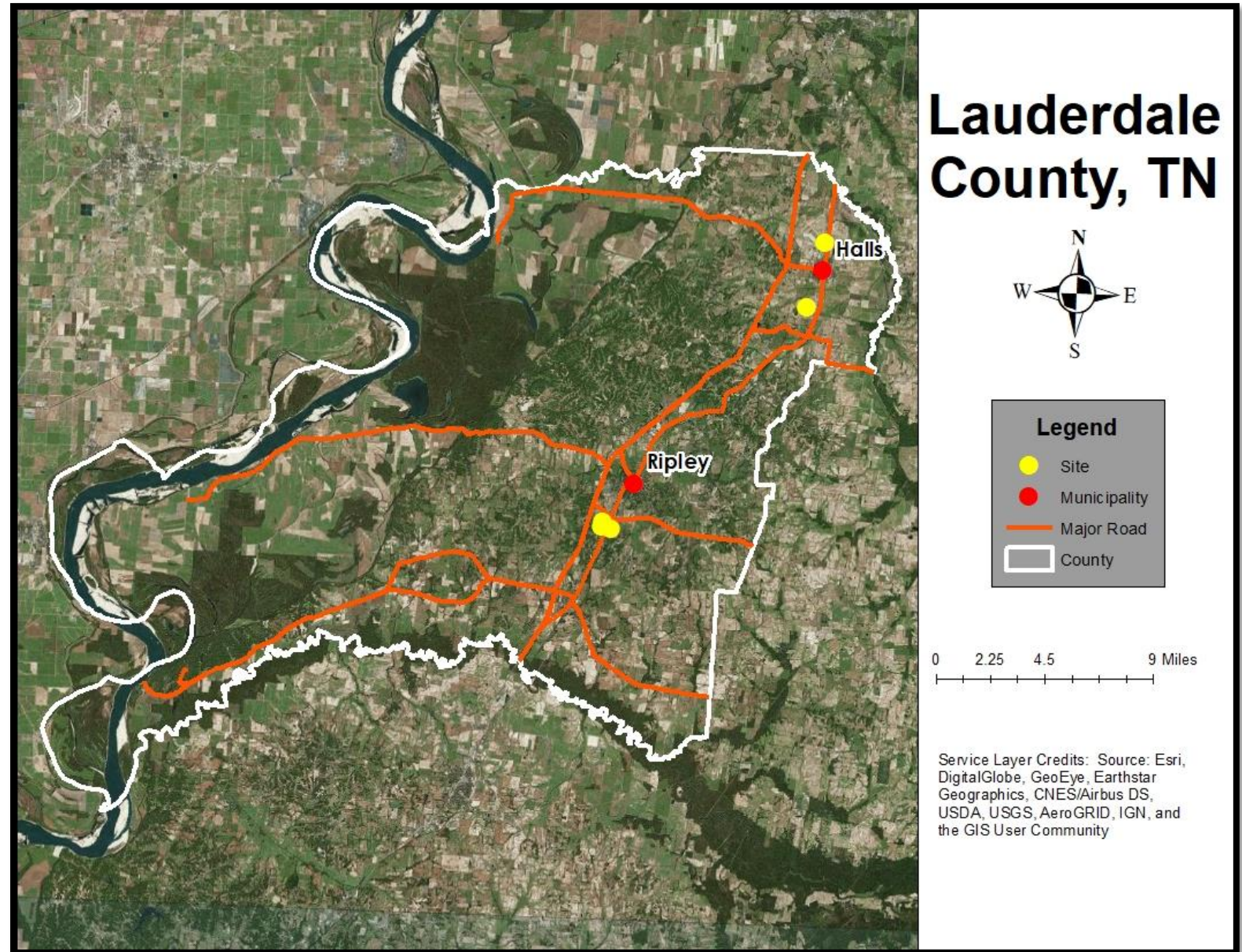
COMMUTING ANALYSIS

DEMOGRAPHIC ANALYSIS

WORKFORCE ANALYSIS

ECONOMIC ANALYSIS

SUMMARY



Source: ESRI, U.S. Census Bureau – Tigerline Files, MTIDA

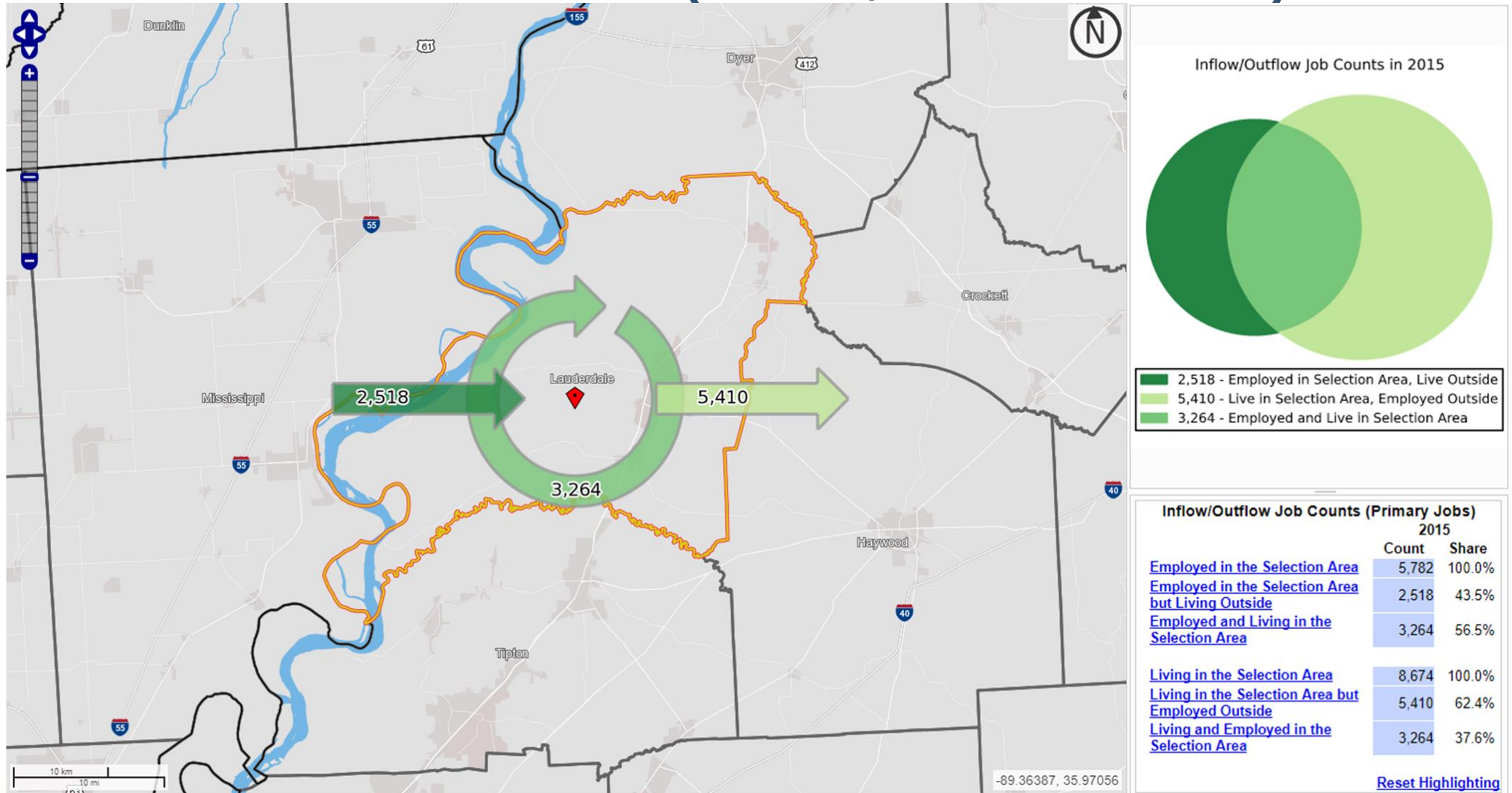
PURPOSE

Conducting a **fundamental economic analysis (FEA)** on this region helps to lay the ground work for recommendations to the community. The information in the FEA includes most of the data points that site selectors look at during a desktop review before visiting a community on a project.

Information of this kind is **valuable** because it is **educational** for Austin, giving the consulting team a much **deeper level of understanding** of the community before a visit. These data, included in the FEA, are commonly used by site selector to determine the economic health of an area and to filter areas so that field investigations are arranged for the most favorable communities.

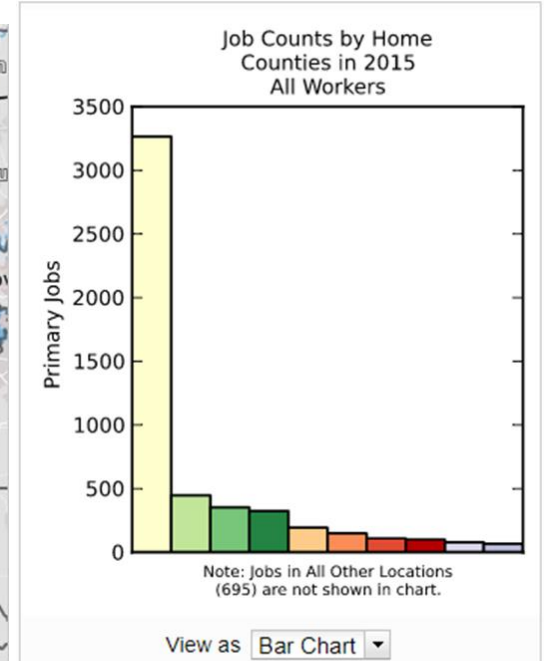
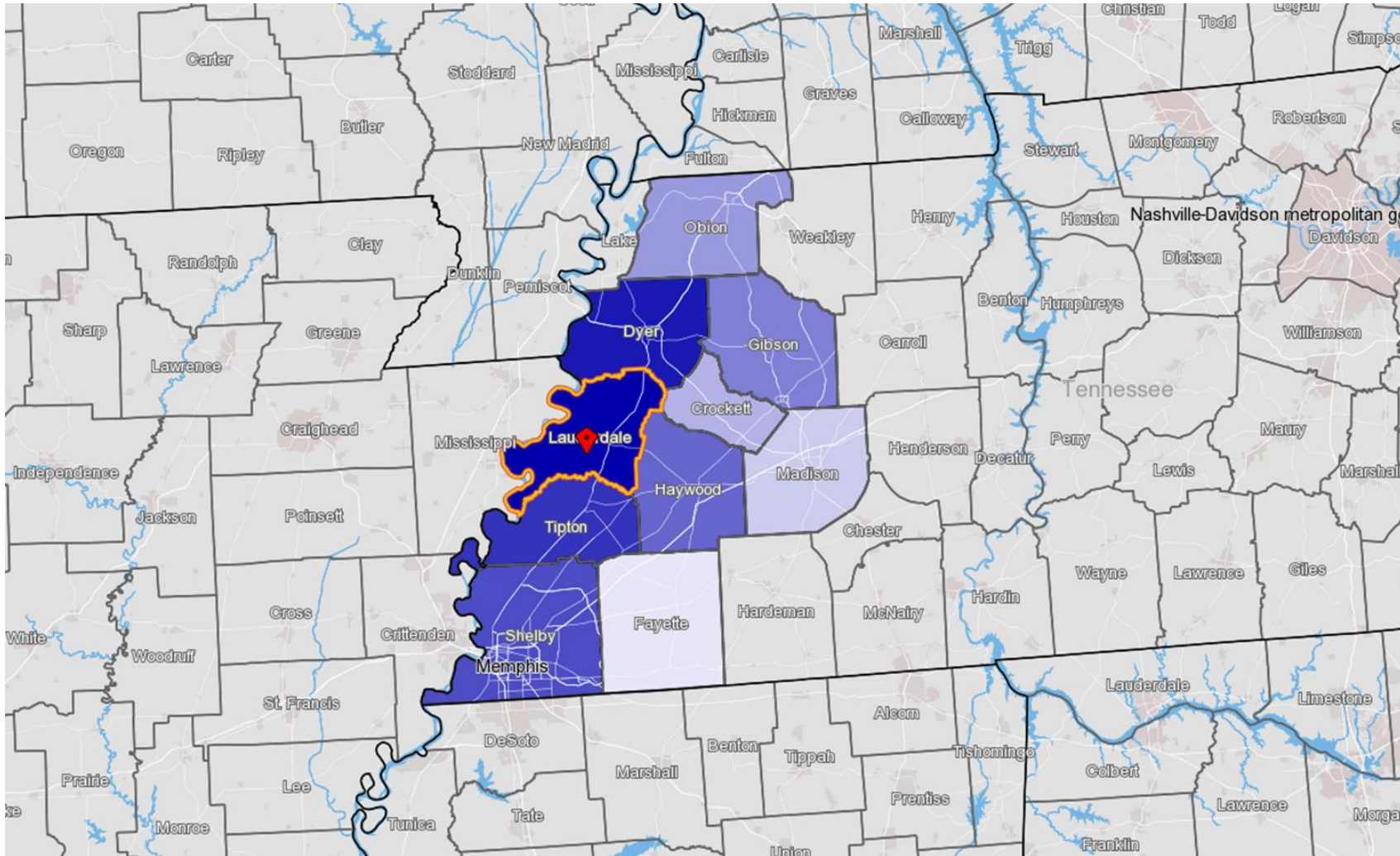
As an **important note**, the information provided in this presentation is meant to show stakeholders how a site selector views a community (i.e. **how we see your community on paper**) before making a visit for a project.

COMMUTING ANALYSIS – LABORSHED (INFLOW/OUTFLOW IN 2015)



Source: U.S. Census Bureau, Center for Economic Studies – OnTheMap

COMMUTING ANALYSIS – LABORSHED (WHERE WORKERS LIVE)

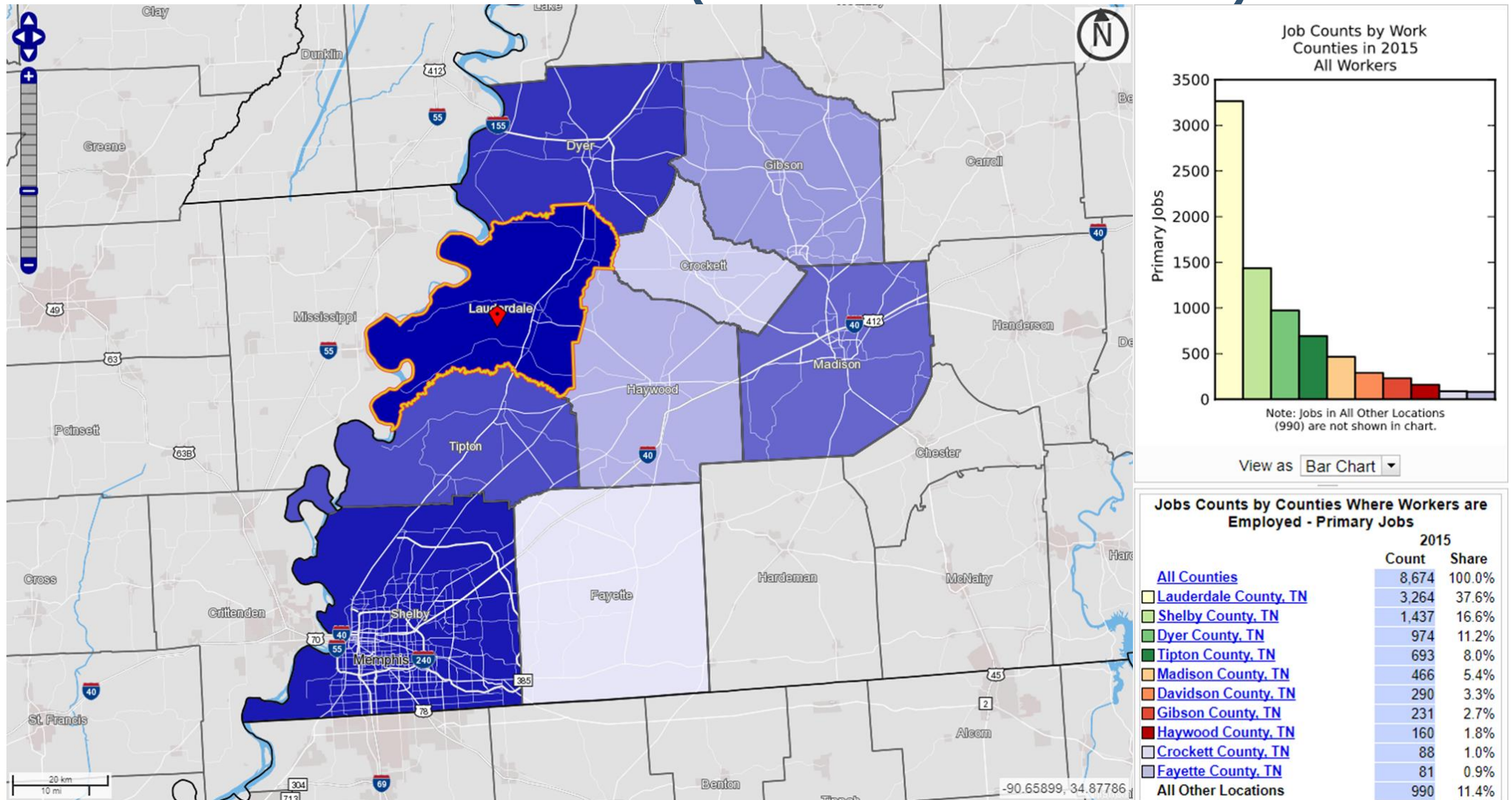


Jobs Counts by Counties Where Workers Live - Primary Jobs

	2015 Count	Share
All Counties	5,782	100.0%
Lauderdale County, TN	3,264	56.5%
Dyer County, TN	448	7.7%
Tipton County, TN	353	6.1%
Shelby County, TN	324	5.6%
Haywood County, TN	193	3.3%
Gibson County, TN	149	2.6%
Obion County, TN	110	1.9%
Crockett County, TN	101	1.7%
Madison County, TN	79	1.4%
Fayette County, TN	66	1.1%
All Other Locations	695	12.0%

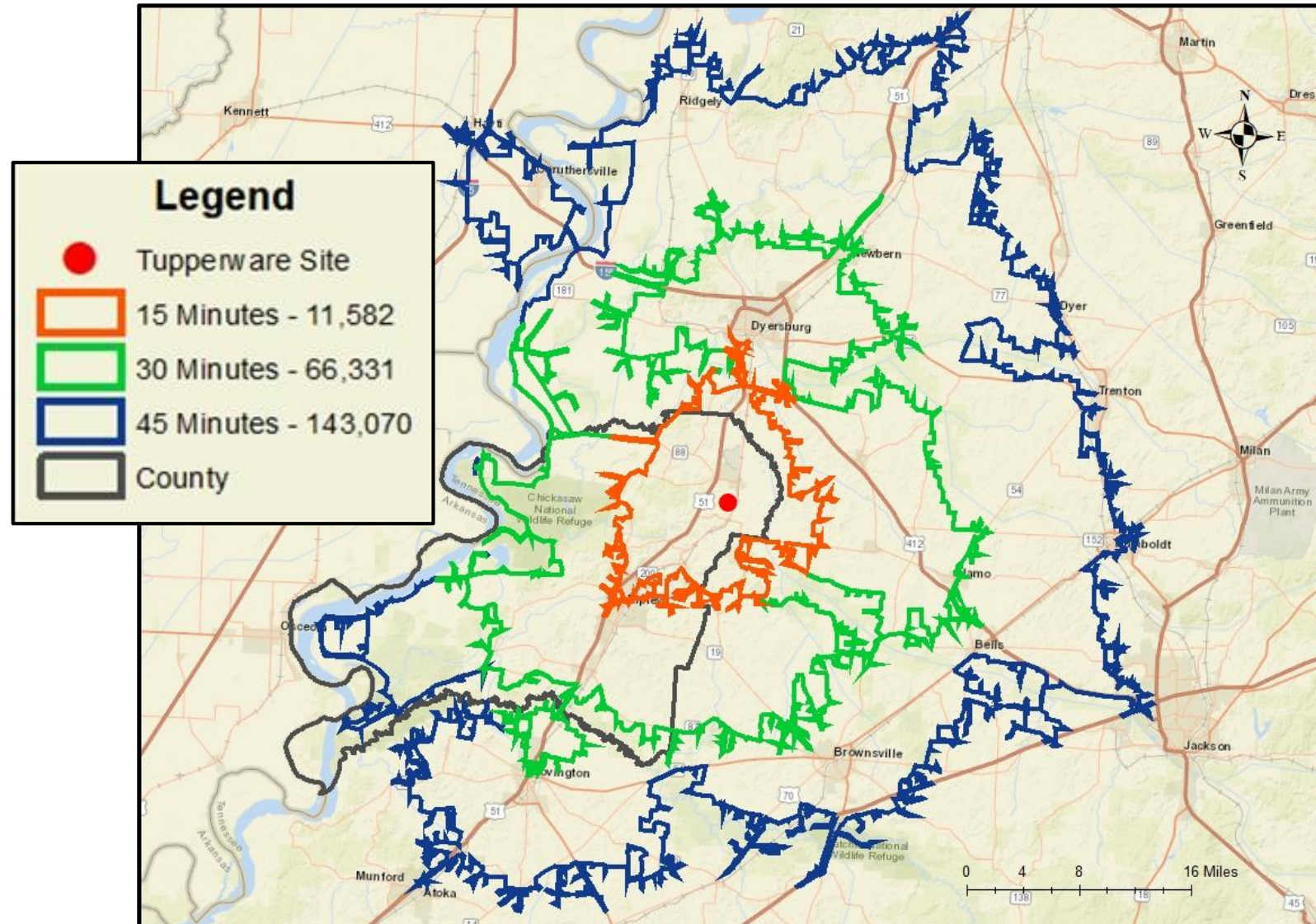
Source: U.S. Census Bureau, Center for Economic Studies – OnTheMap

COMMUTING ANALYSIS – LABORSHED (WHERE RESIDENTS WORK)



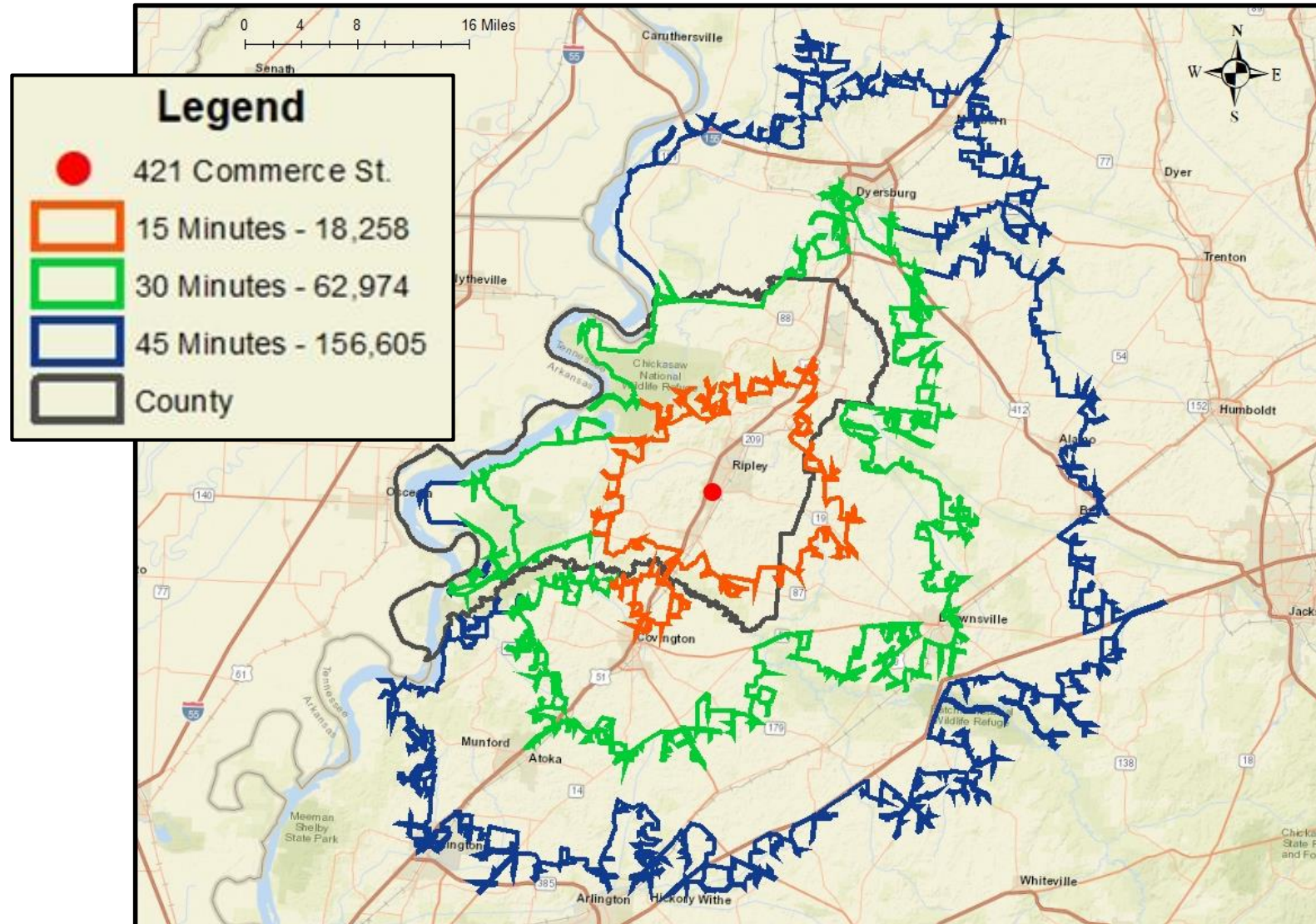
Source: U.S. Census Bureau, Center for Economic Studies – OnTheMap

COMMUTING ANALYSIS – TUPPERWARE SITE DRIVE TIMES



Source: ESRI Business Analyst, U.S. Census Bureau – Tigerline Files

COMMUTING ANALYSIS – 421 COMMERCE ST. DRIVE TIMES



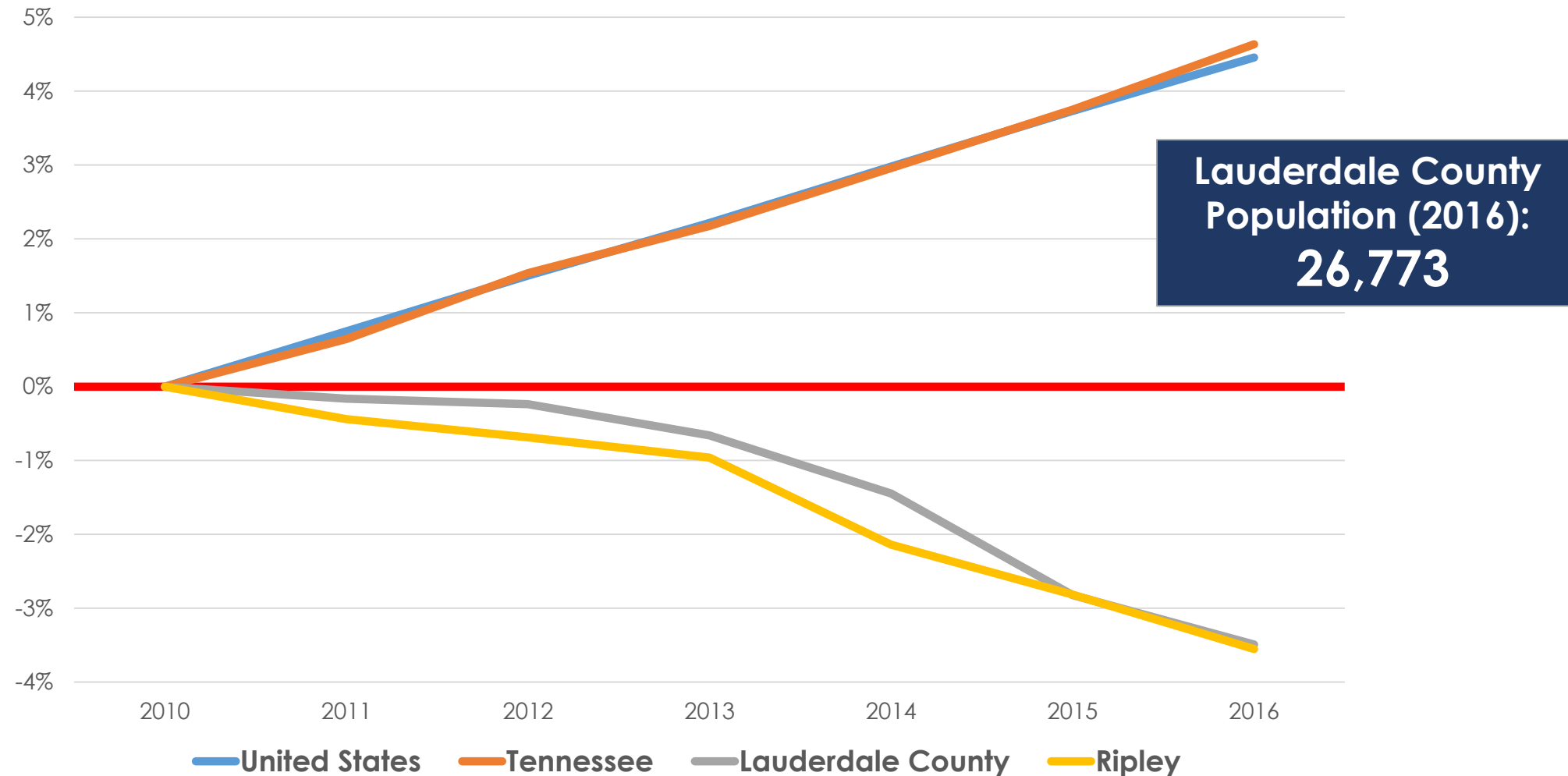
Source: ESRI Business Analyst, U.S. Census Bureau – Tigerline Files

COMMUTING ANALYSIS – DRIVE TIME COMPARISON

Drive Time Population Comparison		
Map Boundary Color	Tupperware Site	421 Commerce St.
15 Minutes	11,582	18,258
30 Minutes	66,331	62,974
45 Minutes	143,070	156,605

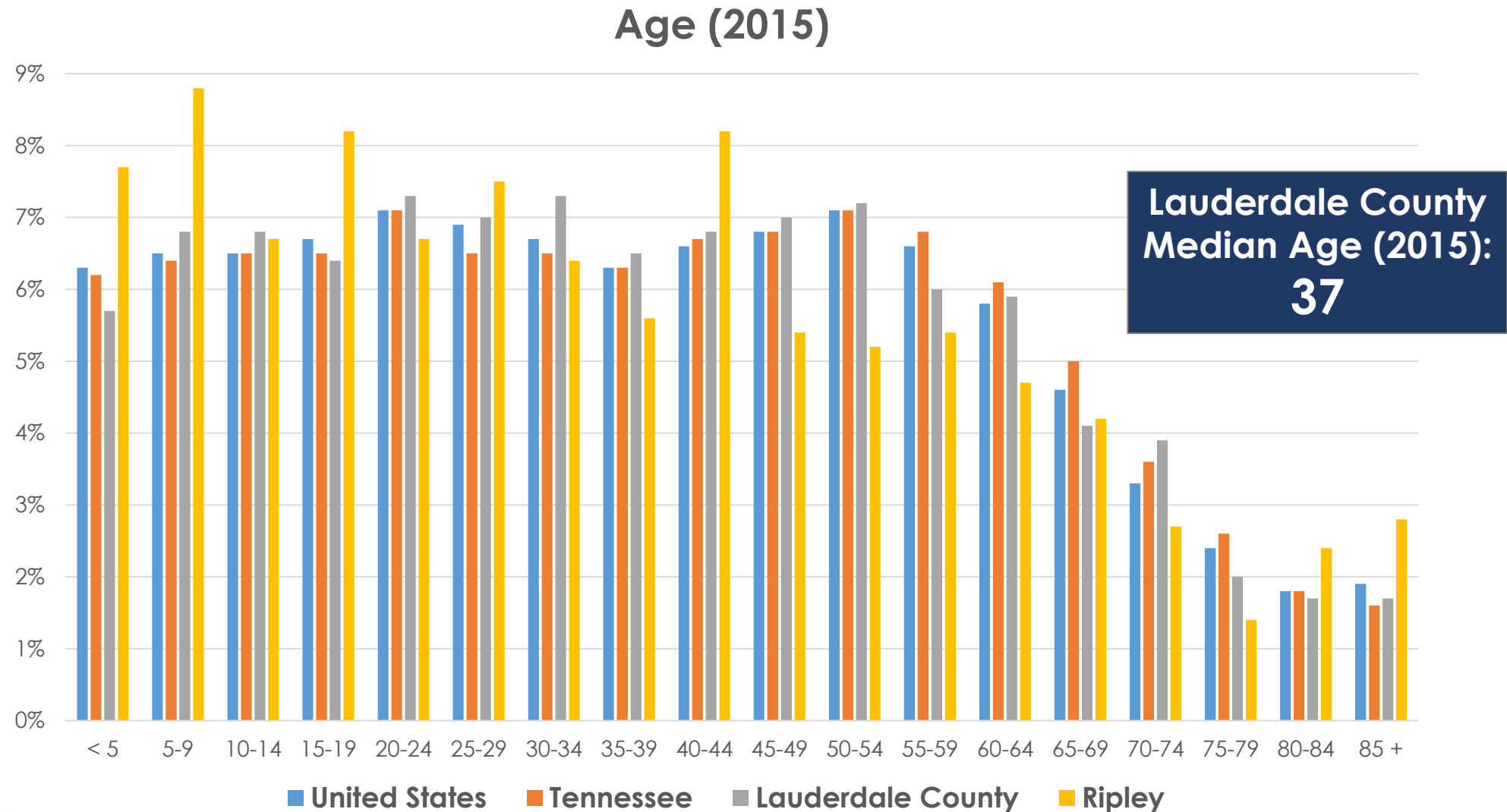
DEMOGRAPHIC ANALYSIS – POPULATION

Population Change



Source: U.S. Census Bureau, American Community Survey

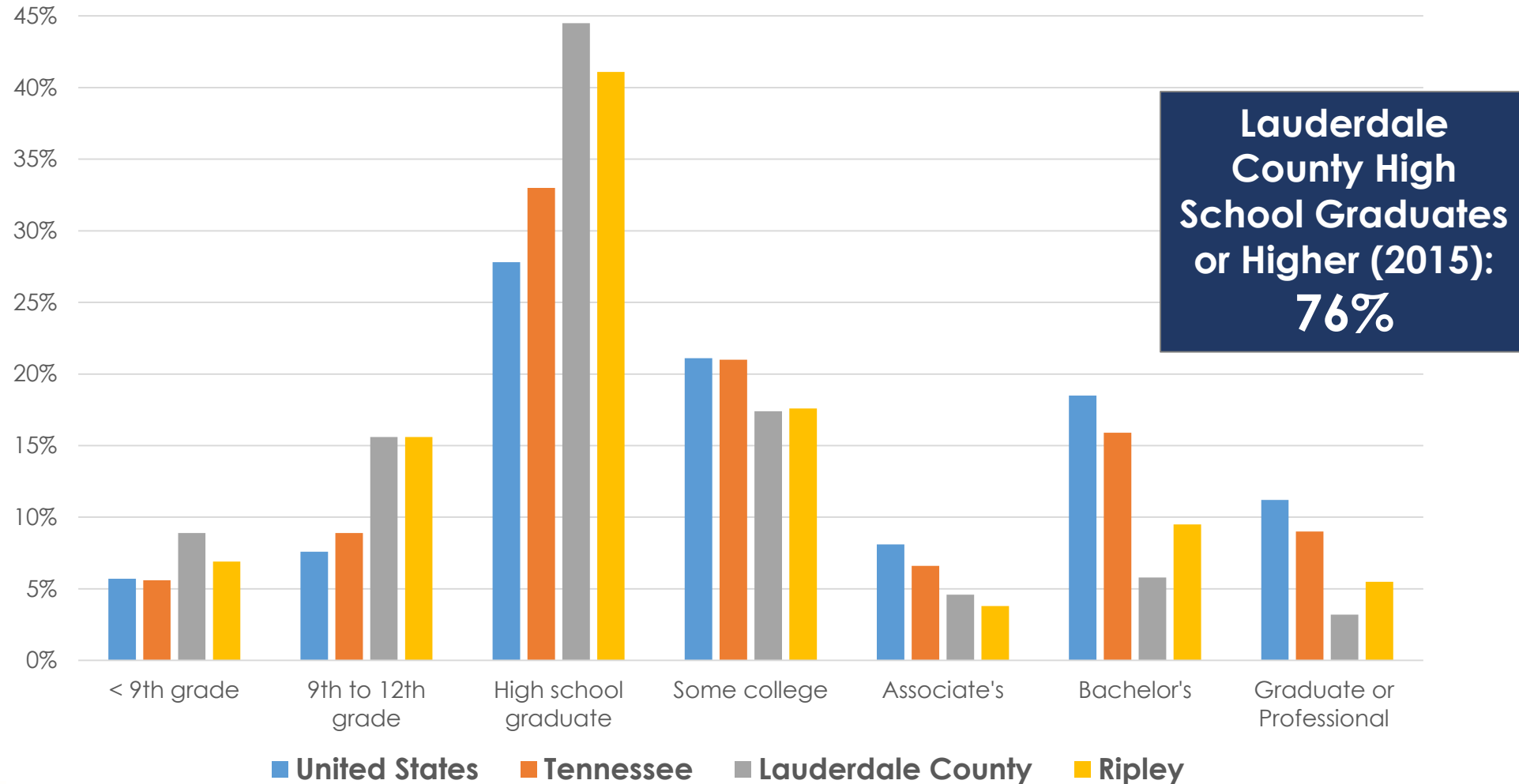
DEMOGRAPHIC ANALYSIS – AGE



Source: U.S. Census Bureau, American Community Survey

DEMOGRAPHIC ANALYSIS – EDUCATION

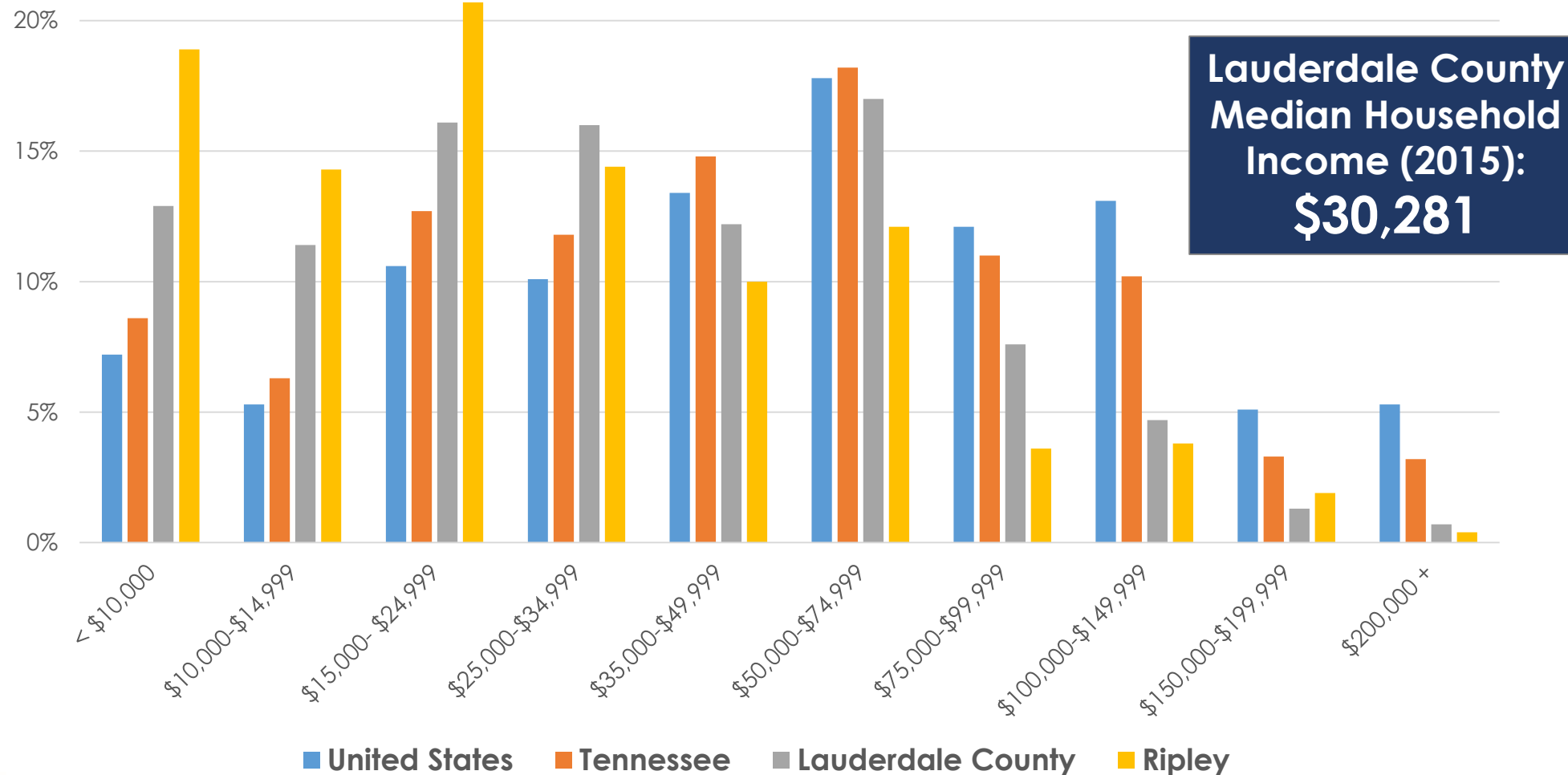
Education Attainment (2015)



Source: U.S. Census Bureau, American Community Survey

DEMOGRAPHIC ANALYSIS – INCOME

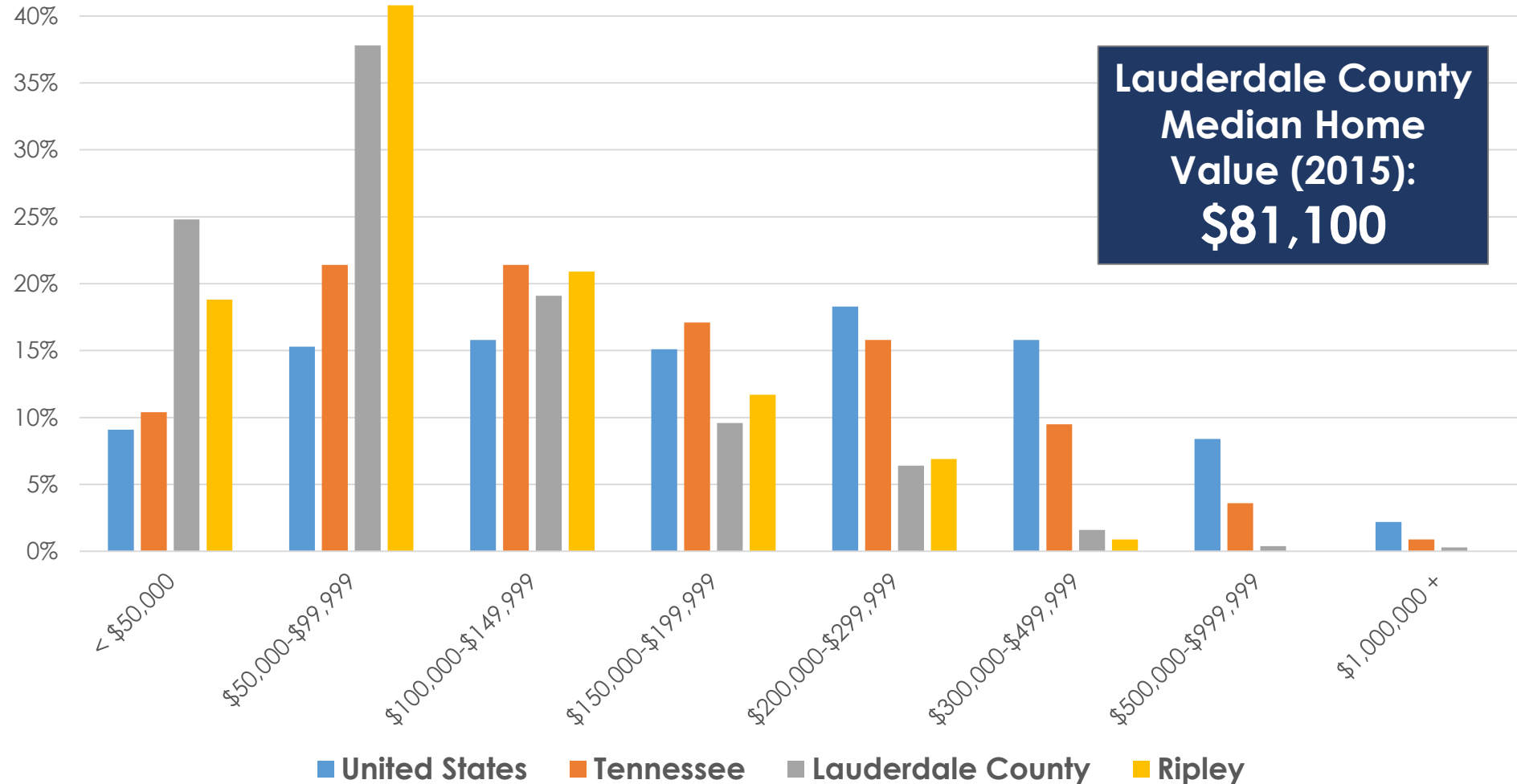
Household Income (2015)



Source: U.S. Census Bureau, American Community Survey

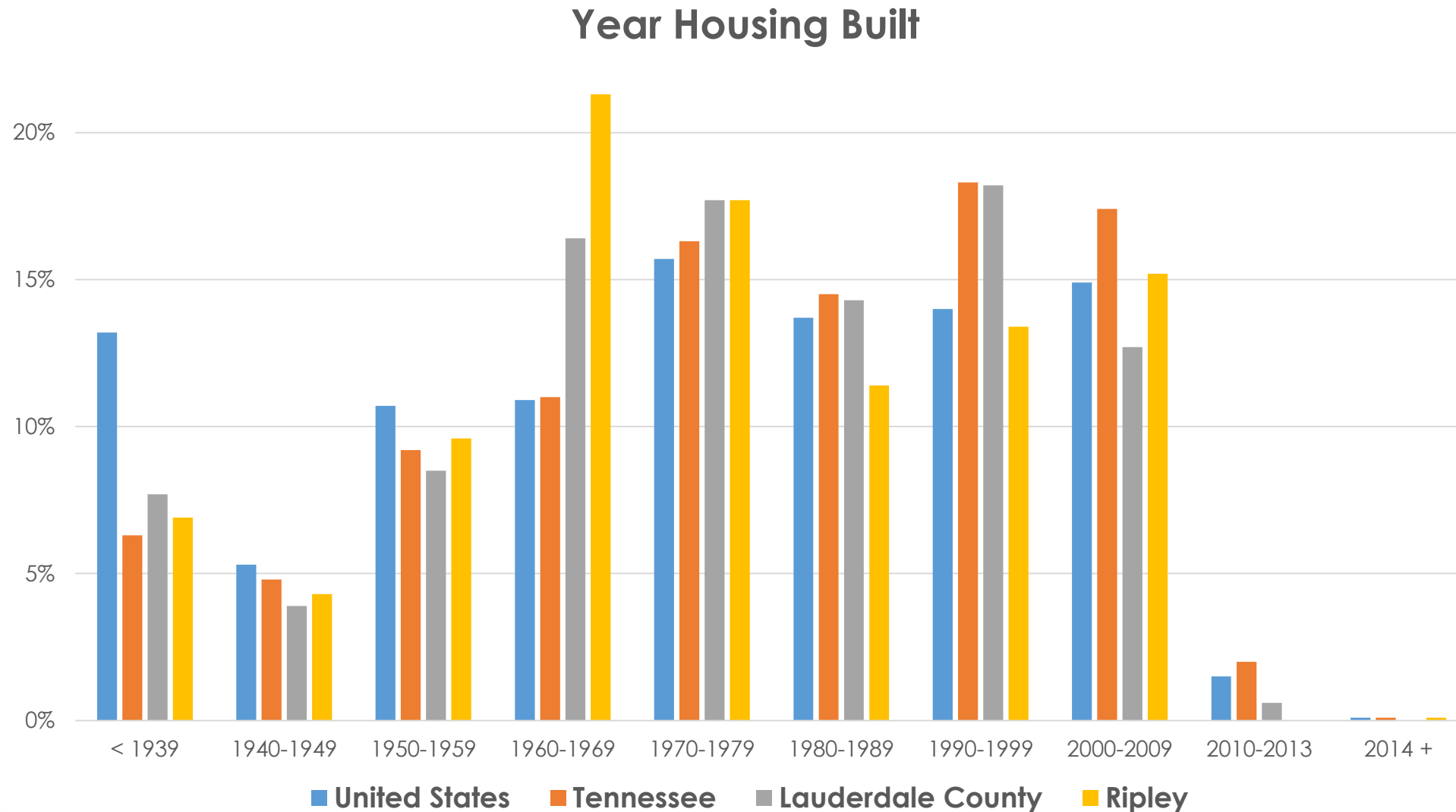
DEMOGRAPHIC ANALYSIS – HOME VALUE

Home Value (2015)



Source: U.S. Census Bureau, American Community Survey

DEMOGRAPHIC ANALYSIS – AGE OF HOUSING



Source: U.S. Census Bureau, American Community Survey

WORKFORCE ANALYSIS – LAUDERDALE COUNTY WORKFORCE SUMMARY (2016)

Description	NAICS	Employment	Establishments	Average Weekly Wages	Average Annual Pay	Total Wages
Agriculture	11	409	23	\$ 608.43	\$ 31,638.28	\$ 12,924,315.04
Mining	21	0	0	\$ -	\$ -	\$ -
Utilities	22	32	1	\$ 1,150.38	\$ 59,819.73	\$ 1,917,067.91
Construction	23	237	16	\$ 466.11	\$ 24,237.90	\$ 5,734,694.70
Manufacturing	31	1224	15	\$ 920.29	\$ 47,854.95	\$ 58,563,270.74
Wholesale	42	286	23	\$ 969.86	\$ 50,432.71	\$ 14,447,984.81
Retail	44	711	71	\$ 419.77	\$ 21,828.09	\$ 15,521,454.24
Transportation	48	349	17	\$ 927.44	\$ 48,226.64	\$ 16,822,908.26
Information	51	27	6	\$ 641.08	\$ 33,336.10	\$ 886,007.11
Finance	52	209	20	\$ 934.91	\$ 48,615.23	\$ 10,174,726.33
Real Estate	53	63	14	\$ 809.23	\$ 42,079.99	\$ 2,646,681.22
Professional	54	79	17	\$ 841.04	\$ 43,733.97	\$ 3,438,414.80
Management	55	16	2	\$ 1,487.16	\$ 77,332.53	\$ 1,232,189.93
Administrative	56	153	10	\$ 294.99	\$ 15,339.29	\$ 2,340,881.25
Educational	61	11	0	\$ 345.70	\$ 17,976.26	\$ 196,219.46
Health Care	62	590	33	\$ 718.03	\$ 37,337.37	\$ 22,046,588.11
Arts,	71	25	3	\$ 367.55	\$ 19,112.47	\$ 485,149.96
Accommodation	72	351	20	\$ 247.88	\$ 12,889.60	\$ 4,521,772.37
Other Services	81	299	29	\$ 344.94	\$ 17,936.92	\$ 5,371,895.26
Government	90	2098	35	\$ 600.84	\$ 31,243.58	\$ 65,545,349.35

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

WORKFORCE ANALYSIS – EMPLOYMENT GROWTH (2006-2016)

Description	NAICS	Lauderdale County	Tennessee	United States
Agriculture	11	-20%	12%	11%
Mining	21	0%	-6%	-1%
Utilities	22	83%	-3%	1%
Construction	23	-36%	-13%	-14%
Manufacturing	31	-38%	-14%	-13%
Wholesale	42	-16%	-10%	0%
Retail	44	-6%	2%	3%
Transportation	48	6%	12%	13%
Information	51	-39%	-9%	-8%
Finance	52	-5%	2%	-2%
Real Estate	53	-41%	4%	-2%
Professional	54	-16%	23%	20%
Management	55	0%	87%	25%
Administrative	56	17%	20%	8%
Educational	61	0%	20%	26%
Health Care	62	-14%	25%	28%
Arts,	71	-23%	18%	18%
Accommodation	72	5%	18%	20%
Other Services	81	16%	3%	1%
Government	90	56%	2%	2%

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

WORKFORCE ANALYSIS – PROJECTED EMPLOYMENT GROWTH (2016-2026)

Description	NAICS	Lauderdale County	Tennessee	United States
Agriculture	11	0%	7%	5%
Mining	21	0%	6%	11%
Utilities	22	9%	-1%	0%
Construction	23	5%	11%	14%
Manufacturing	31	-20%	5%	0%
Wholesale	42	2%	5%	9%
Retail	44	2%	7%	8%
Transportation	48	38%	10%	9%
Information	51	27%	5%	4%
Finance	52	6%	13%	10%
Real Estate	53	14%	16%	9%
Professional	54	27%	21%	16%
Management	55	32%	30%	9%
Administrative	56	8%	19%	13%
Educational	61	19%	15%	15%
Health Care	62	7%	25%	22%
Arts,	71	19%	15%	12%
Accommodation	72	2%	11%	11%
Other Services	81	15%	10%	8%
Government	90	34%	6%	5%

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

WORKFORCE ANALYSIS – WAGE GROWTH (2006-2016)

Description	NAICS	Lauderdale County	Tennessee	United States
Agriculture	11	60%	24%	37%
Mining	21	0%	20%	32%
Utilities	22	105%	35%	31%
Construction	23	10%	36%	33%
Manufacturing	31	34%	30%	26%
Wholesale	42	22%	33%	27%
Retail	44	13%	20%	19%
Transportation	48	20%	18%	23%
Information	51	39%	30%	49%
Finance	52	31%	32%	29%
Real Estate	53	129%	31%	31%
Professional	54	-40%	37%	33%
Management	55	0%	41%	30%
Administrative	56	-13%	25%	29%
Educational	61	0%	3%	26%
Health Care	62	57%	25%	23%
Arts,	71	79%	36%	23%
Accommodation	72	29%	23%	28%
Other Services	81	15%	28%	32%
Government	90	18%	21%	24%

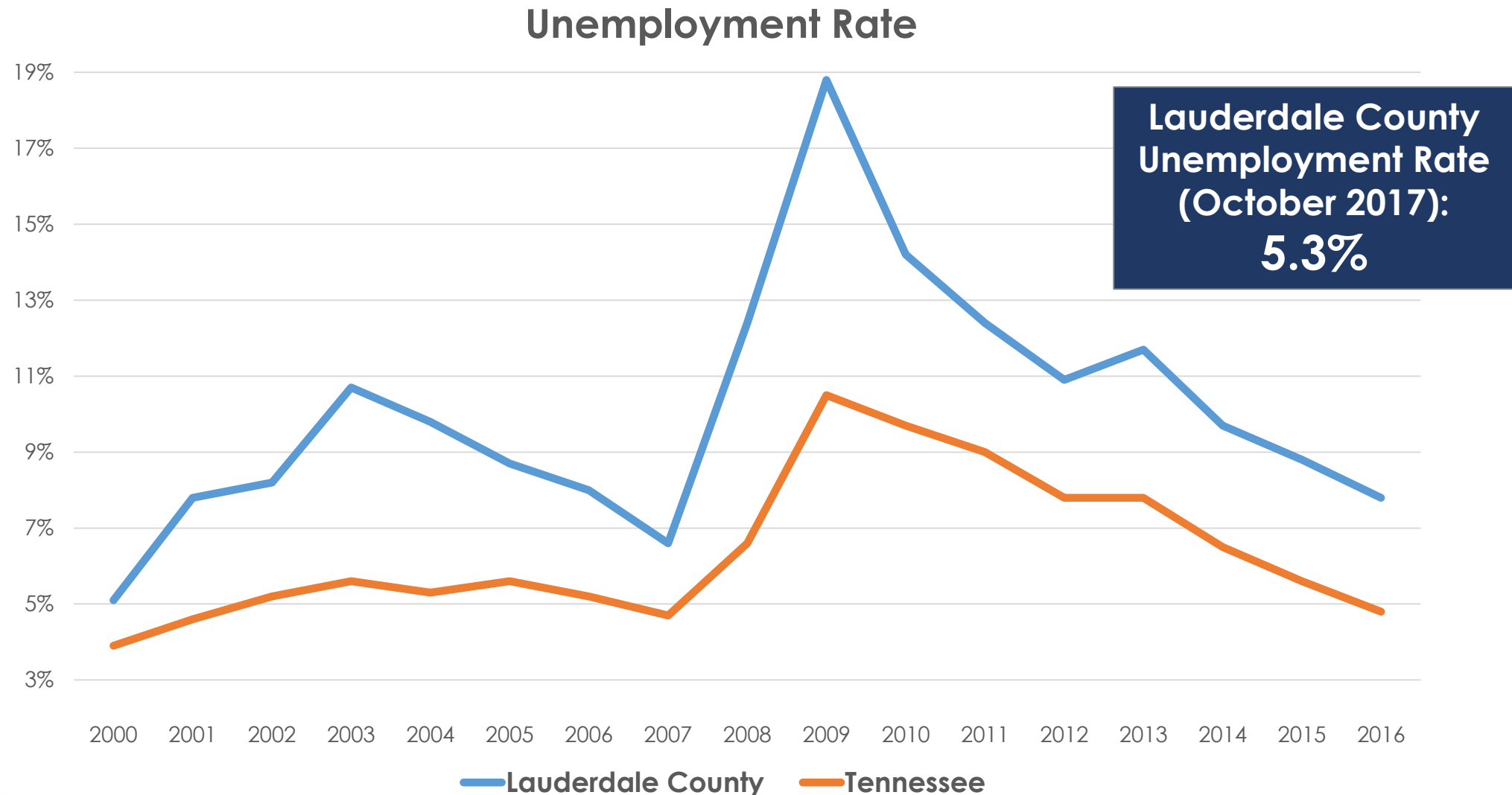
Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

WORKFORCE ANALYSIS – PERCENTAGE OF EMPLOYMENT (2016)

Description	NAICS	Lauderdale County	Tennessee	United States
Agriculture	11	6%	0%	1%
Mining	21	0%	0%	0%
Utilities	22	0%	0%	0%
Construction	23	3%	4%	5%
Manufacturing	31	17%	11%	8%
Wholesale	42	4%	4%	4%
Retail	44	10%	11%	11%
Transportation	48	5%	5%	3%
Information	51	0%	1%	2%
Finance	52	3%	4%	4%
Real Estate	53	1%	1%	1%
Professional	54	1%	4%	6%
Management	55	0%	1%	2%
Administrative	56	2%	8%	6%
Educational	61	0%	2%	3%
Health Care	62	8%	12%	13%
Arts,	71	0%	1%	2%
Accommodation	72	5%	9%	9%
Other Services	81	4%	4%	4%
Government	90	29%	15%	16%

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

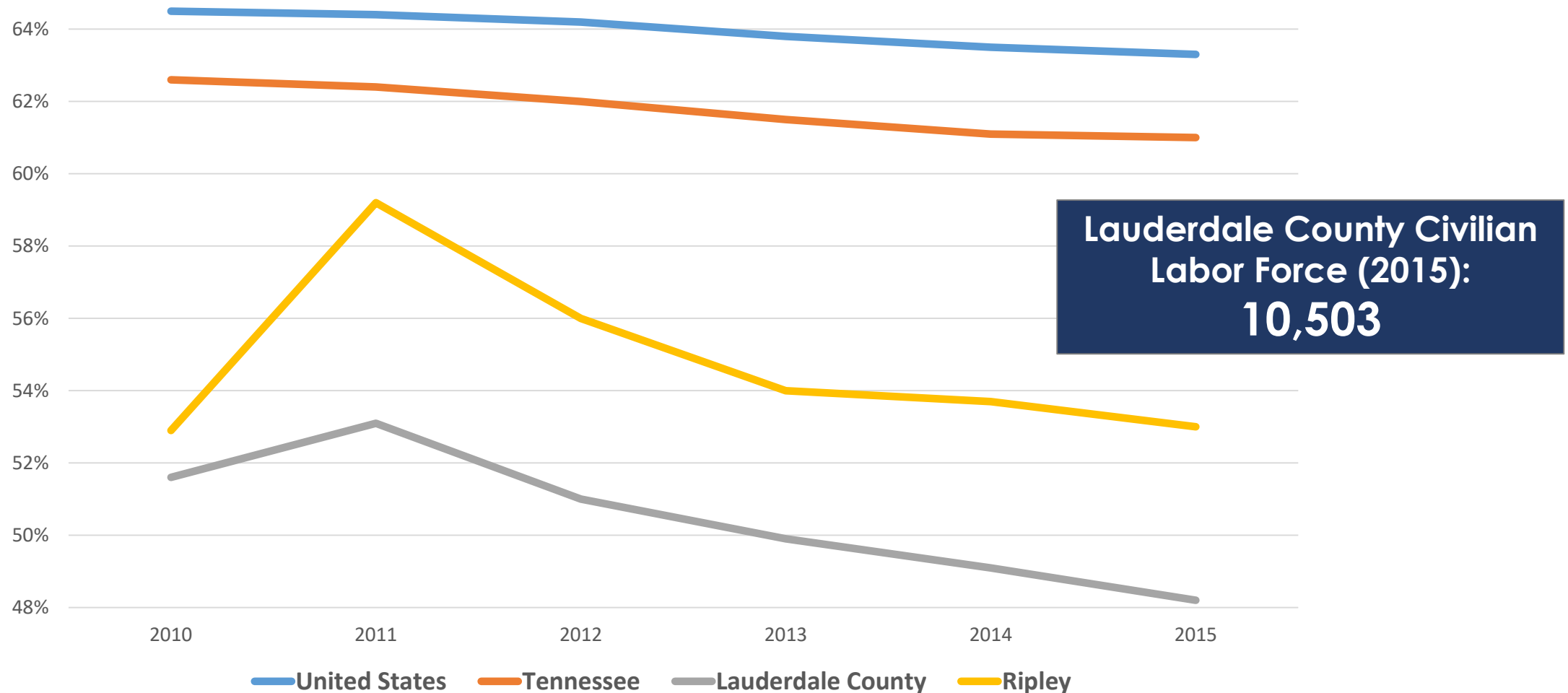
WORKFORCE ANALYSIS – UNEMPLOYMENT RATE



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

WORKFORCE ANALYSIS – LABOR FORCE PARTICIPATION

Labor Force Participation Rate



Source: U.S. Census Bureau, American Community Survey

ECONOMIC ANALYSIS – LAUDERDALE COUNTY OVERVIEW

Economy Overview	
Population (2016)	26,774
Jobs (2016)	7,168
Average Earnings (2016)	\$ 42,693.00
COL Adjusted Average Earnings (2016)	\$ 49,643.47
Unemployed (1/2017)	751
Completions (2016)	100
GRP (2016)	\$ 551,366,130.44
Exports (2016)	\$ 1,081,726,180.74
Imports (2016)	\$ 1,358,539,130.28

ECONOMIC ANALYSIS – EMPLOYMENT DENSITY (2016)

Description	NAICS	Lauderdale County	Tennessee
Agriculture	11	4.63	0.38
Mining	21	0.00	0.25
Utilities	22	1.27	0.30
Construction	23	0.61	0.85
Manufacturing	31	2.16	1.37
Wholesale	42	1.06	1.01
Retail	44	0.96	1.04
Transportation	48	1.42	1.59
Information	51	0.20	0.79
Finance	52	0.75	0.91
Real Estate	53	0.53	0.88
Professional	54	0.17	0.74
Management	55	0.16	0.99
Administrative	56	0.34	1.25
Educational	61	0.06	0.82
Health Care	62	0.66	0.94
Arts,	71	0.21	0.78
Accommodation	72	0.57	1.05
Other Services	81	0.87	1.02
Government	90	1.90	0.91

**Employment density
is measured by the
*Location Quotient***

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

ECONOMIC ANALYSIS – EMPLOYMENT COMPETITIVENESS (2006-2016)

Description	NAICS	Lauderdale County	Tennessee
Agriculture	11	-159	41
Mining	21	0	-193
Utilities	22	14	-153
Construction	23	-85	881
Manufacturing	31	-493	-5340
Wholesale	42	-52	-12037
Retail	44	-71	-4156
Transportation	48	-23	-838
Information	51	-14	-241
Finance	52	-7	4236
Real Estate	53	-41	2194
Professional	54	-33	3535
Management	55	0	14800
Administrative	56	13	23904
Educational	61	0	-2818
Health Care	62	-285	-7777
Arts,	71	-13	54
Accommodation	72	-50	-3332
Other Services	81	39	2678
Government	90	734	3283

**Employment
competitiveness is
measured through a
*Shift Share Analysis***

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

ECONOMIC ANALYSIS – LAUDERDALE COUNTY GROSS REGIONAL PRODUCT (2016)

Earnings	Property Income	Taxes on Production	Total GRP
\$ 338,694,530	\$ 103,897,088	\$ 28,174,758	\$ 467,669,736
Description	NAICS	2016 GRP	% of Total
Agriculture	11	\$ 20,600,684.9	4%
Mining	21	\$ 303,830.0	0%
Utilities	22	\$ 9,254,074.6	2%
Construction	23	\$ 12,109,283.9	3%
Manufacturing	31	\$ 105,238,555.2	23%
Wholesale	42	\$ 37,427,648.8	8%
Retail	44	\$ 32,869,004.0	7%
Transportation	48	\$ 29,210,160.7	6%
Information	51	\$ 3,458,924.4	1%
Finance	52	\$ 25,152,455.2	5%
Real Estate	53	\$ 13,364,241.4	3%
Professional	54	\$ 5,954,941.9	1%
Management	55	\$ 1,832,144.7	0%
Administrative	56	\$ 5,918,291.9	1%
Educational	61	\$ 301,646.9	0%
Health Care	62	\$ 30,056,349.8	6%
Arts,	71	\$ 1,204,034.4	0%
Accommodatio	72	\$ 10,099,666.7	2%
Other Services	81	\$ 9,067,878.2	2%
Government	90	\$ 114,245,918.9	24%

Source: EMSI 2017.3 Class of Worker, U.S. Bureau of Labor Statistics, U.S. Census Bureau

ECONOMIC ANALYSIS – TOP 20 INDUSTRIES IN LAUDERDALE COUNTY

Description	NAICS	2016 Jobs	2006 - 2026 % Change	Avg. Earnings Per Job	2016 Location Quotient	2016 Total Sales	2016 Earnings	2016 Property Income	2016 Taxes	2016 GRP	2016 Jobs Multiplier
Elementary and Secondary Schools	903611	699	9%	\$47,233	2.17	\$38,587,269	\$33,011,212	\$1,596,837	\$0	\$34,608,050	1.05
Local Government	903999	637	39%	\$36,295	2.50	\$86,903,252	\$23,108,104	\$2,261,990	\$0	\$25,370,094	1.99
State Government	902999	635	5995%	\$55,867	6.16	\$368,476,703	\$35,549,761	\$10,679,546	\$0	\$46,229,308	2.73
Wood Window and Door Manufacturing	321911	583	(61%)	\$60,212	260.34	\$145,063,518	\$35,120,469	\$8,554,571	\$1,096,064	\$44,770,303	1.19
Crop Production	111000	332	18%	\$33,372	8.70	\$66,904,483	\$16,962,664	\$1,571,697	\$1,310,530	\$17,331,405	1.24
Men's and Boys' Cut and Sew Apparel Manufacturing	315220	266	244%	\$36,404	213.54	\$31,048,020	\$9,680,159	\$868,330	\$293,837	\$10,841,756	1.09
General Freight Trucking, Long-Distance, Truckload	484121	250	95%	\$53,329	8.98	\$42,220,298	\$14,716,650	\$2,088,271	\$512,629	\$17,317,537	1.13
Limited-Service Restaurants	722513	231	66%	\$13,550	1.20	\$12,452,049	\$3,240,534	\$1,466,228	\$875,645	\$5,582,408	1.06
Warehouse Clubs and Supercenters	452910	205	19%	\$30,333	3.05	\$15,855,136	\$6,207,726	\$1,263,235	\$2,970,844	\$10,441,802	1.11
General Medical and Surgical Hospitals	622110	194	28%	\$41,763	0.93	\$18,551,601	\$8,475,691	\$529,776	\$216,344	\$9,203,559	1.10
Commercial Banking	522110	124	(14%)	\$50,931	2.10	\$23,677,930	\$6,426,947	\$10,184,459	\$491,001	\$17,102,329	1.18
Supermarkets and Other Grocery Stores	445110	115	(18%)	\$17,536	1.00	\$4,894,405	\$2,040,371	\$643,232	\$518,950	\$3,202,554	1.06
Nursing Care Facilities	623110	115	(50%)	\$30,317	1.55	\$6,890,406	\$3,507,692	\$176,793	\$359,183	\$4,043,466	1.06
Offices of Physicians	621111	111	321%	\$84,668	0.97	\$15,620,385	\$9,559,871	\$462,776	\$132,137	\$10,154,783	1.12
Other Motor Vehicle Parts Manufacturing	336390	95	Insf. Data	\$92,714	13.56	\$64,673,984	\$8,847,397	\$5,108,733	\$349,266	\$14,305,377	1.36
Gasoline Stations with Convenience Stores	447110	90	35%	\$18,444	2.42	\$4,814,678	\$1,956,063	\$97,866	\$625,013	\$2,678,942	1.06
Full-Service Restaurants	722511	88	(4%)	\$16,314	0.36	\$4,045,485	\$1,542,902	\$127,254	\$253,422	\$1,923,578	1.05
Religious Organizations	813110	87	67%	\$11,412	1.12	\$3,102,034	\$1,073,509	\$122,545	\$0	\$1,196,054	1.03
Asphalt Paving Mixture and Block Manufacturing	324121	83	102%	\$93,498	124.83	\$45,520,874	\$7,777,845	\$11,504,710	\$245,344	\$19,470,970	1.38
Janitorial Services	561720	81	247%	\$11,925	1.35	\$4,864,260	\$2,219,400	\$749,040	\$69,668	\$3,038,108	1.03

ECONOMIC ANALYSIS – TOP 20 OCCUPATIONS IN LAUDERDALE COUNTY

Description	SOC	2016 Jobs	2006 - 2026 % Change	2016 Location Quotient	Median Hourly Earnings	Avg. Hourly Earnings	Typical Entry Level Education
Team Assemblers	51-2092	262	(46%)	5.17	\$14.89	\$15.31	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	53-3032	243	22%	2.78	\$15.71	\$17.33	Postsecondary nondegree award
Correctional Officers and Jailers	33-3012	184	832%	9.26	\$12.68	\$12.94	High school diploma or equivalent
Cashiers	41-2011	184	3%	1.14	\$8.34	\$8.85	No formal educational credential
Farmers, Ranchers, and Other Agricultural Managers	11-9013	173	(38%)	7.79	\$23.69	\$11.83	High school diploma or equivalent
Retail Salespersons	41-2031	153	3%	0.73	\$10.10	\$12.17	No formal educational credential
Sewing Machine Operators	51-6031	145	244%	20.76	\$10.72	\$12.05	No formal educational credential
Secretaries and Administrative Assistants	43-6014	141	21%	1.13	\$12.66	\$13.23	High school diploma or equivalent
Office Clerks, General	43-9061	133	36%	0.88	\$11.78	\$12.91	High school diploma or equivalent
Combined Food Preparation and Serving Workers,	35-3021	129	19%	0.82	\$8.56	\$8.55	No formal educational credential
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	45-2092	117	5%	3.25	\$13.78	\$13.52	No formal educational credential
Janitors and Cleaners	37-2011	116	74%	1.00	\$9.10	\$9.94	No formal educational credential
Laborers and Freight, Stock, and Material Movers, Hand	53-7062	111	(31%)	0.93	\$12.09	\$13.12	No formal educational credential
Elementary School Teachers	25-2021	107	12%	1.69	\$20.57	\$20.49	Bachelor's degree
First-Line Supervisors of Retail Sales Workers	41-1011	98	(10%)	1.53	\$14.72	\$16.86	High school diploma or equivalent
Teacher Assistants	25-9041	87	13%	1.45	\$8.67	\$9.34	Some college, no degree
Stock Clerks and Order Fillers	43-5081	84	2%	0.92	\$9.00	\$10.93	No formal educational credential
Registered Nurses	29-1141	82	69%	0.62	\$24.05	\$24.10	Bachelor's degree
General and Operations Managers	11-1021	77	5%	0.76	\$38.23	\$48.38	Bachelor's degree
Nursing Assistants	31-1014	77	(9%)	1.14	\$9.33	\$9.33	Postsecondary nondegree award

THANK YOU

