



Advanced Manufacturing

Advanced Manufacturing industry leaders like Honeywell and DuPont have called Virginia's Gateway Region home for decades. Rolls-Royce's decision to locate in the region in 2008 launched the next wave of high-tech growth.

Assets:

- ✧ **Abundant water/wastewater/electric/fiber optic** infrastructure capacity for resource-intensive users at low rates
- ✧ **Skill development** via local university degrees in Manufacturing Engineering, Precisions Machining, etc.
- ✧ **Manufacturing heritage** embedded in local history and the labor force's work ethic (according to area employers)
- ✧ **Existing industry investment** in precision metals, advanced materials, chemicals and more
- ✧ **Manufacturing Technician** certification **training originated in the area**
- ✧ **Customize your workforce training program** with the Community College Workforce Alliance
- ✧ **Public-private research partnership** (Commonwealth Center for Advanced Manufacturing) makes the region a focal point for the manufacturing research expertise of Virginia's top universities and the top corporate innovators

Sample Relevant Occupations:

Occupation	Total Currently Employed*	Total Looking For Work*
Aerospace Engineers	3,371	57
Industrial Engineers	2,040	54
Mechanical Engineers	2,923	52
Machinists	2,740	106
Software Developers, System Software	15,506	296
Purchasing Agents, Except Wholesale/Retail/Farm	5485	118
Business Operations Specialists, All Other	10568	325
Computer-Controlled Machine Tool Operators	1525	63
Chemical Equipment Operators & Tenders	1363	41

Notes: 45-min workforce commute area | *includes workers in related occupations that can be easily retrained for this occupation | Data Q2 2016

Top Industry Employers:

Company	Product/Service	Employees
DuPont	Kevlar, Yuvek, Nomex, Teflon	2,376
Honeywell	Chemicals, fibers and R&D center	1,250
Hillphoenix	Refrigeration casings	945
General Electric	Power generation turbines	928
Evonik	Chemicals for skin & hair products, R&D	320
Church & Dwight	Personal care products	320
Ashland	Specialty chemicals	254
Essentra Porous Technologies	Bonded fiber and foam components	250
Rolls-Royce North America	Disks/blades for aircraft engines	200

Updated 2016



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Workforce Pipeline:

Source of Labor	Number
All Manufacturing Industries Employment	38,383
“Advanced Manufacturing” Industries Employment	14,597
Temporary Staffing Services Industry Employment	14,296
Production Occupations Employment	34,913
Engineers & Technicians Occupations Employment	10,122
High School Technical Centers Enrollment, with manufacturing-related skills	4,400+
Transitioning Military (annually), with manufacturing-related skills	221
Career Readiness Certifications granted 2014-2016	4,648

Source: Bureau of Labor Statistics, Chmura Analytics, area high schools, Department of Defense, Virginia Community College System

Degrees & Certificates:

Total Awards granted annually, including certificates, degrees and postgraduate:

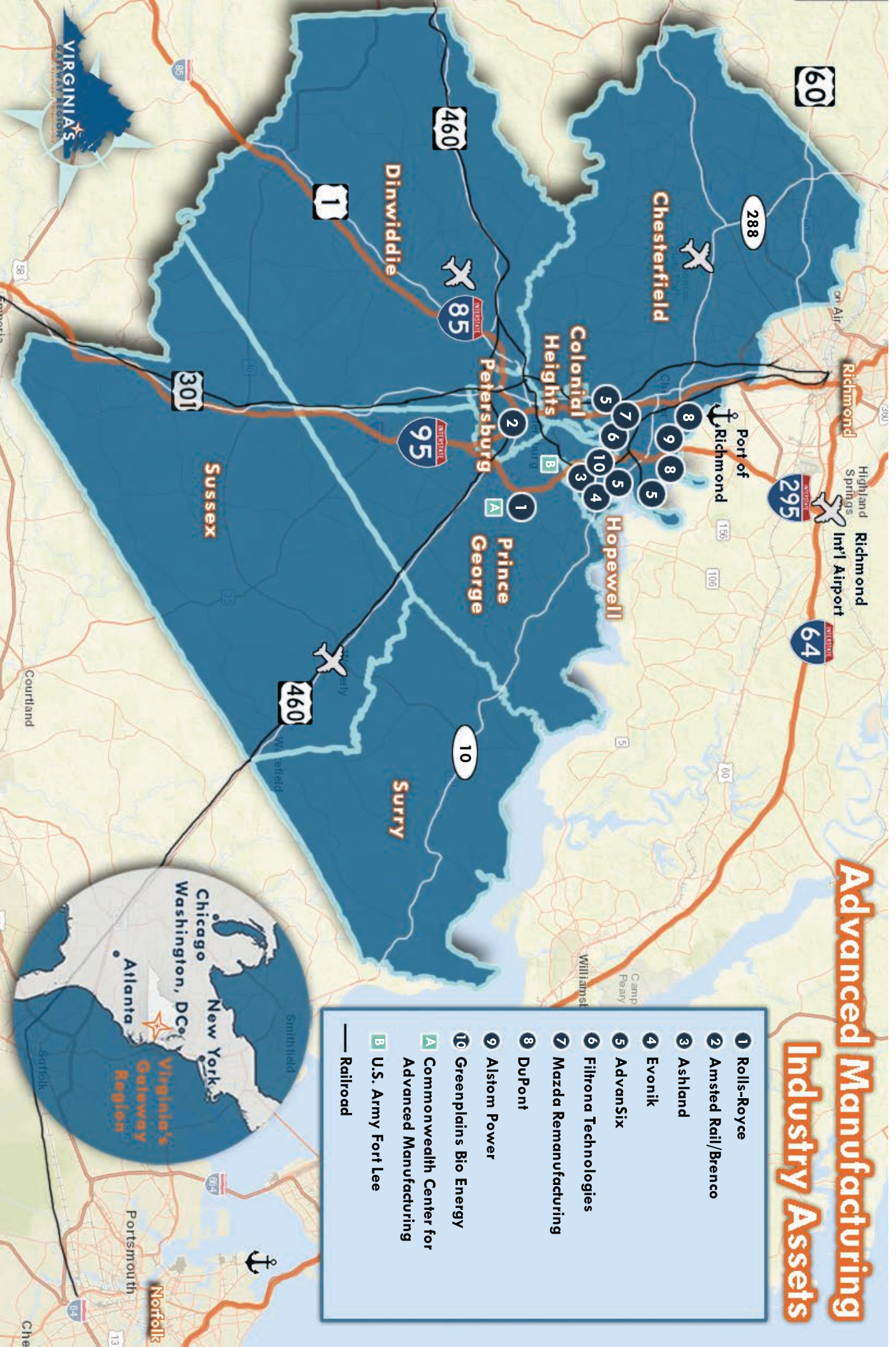
Name	# in Workforce Area*	# in State
All Engineers & Technicians	619	6,980
Industrial, Mechanical, Manufacturing Engineers & Technicians	218	1,707
Aerospace Engineers & Technicians	n/a	245
Chemical Engineers	n/a	209
Business Administration & Management	1,310	10,068

Source: National Center for Education Statistics, Chmura Analytics



Advanced Manufacturing Industry Assets

- 1 Rolls-Royce
- 2 Amsted Rail/Brenco
- 3 Ashland
- 4 Evonik
- 5 AdvanSix
- 6 Filtrona Technologies
- 7 Mazda Remanufacturing
- 8 DuPont
- 9 Alstom Power
- 10 Greenplains Bio Energy
- A Commonwealth Center for Advanced Manufacturing
- B U.S. Army Fort Lee
- Railroad





Food & Natural Products

Virginia's Food processing industry has a direct economic output of \$18.8 billion, more than 34,000 workers and over 500 food and beverage manufacturing firms. Virginia's Gateway Region Is an excellent location for food and natural products companies to grow, prepare and serve their products for global consumers.

20% Regional land actively involved in agriculture

1,000+ Regional farms averaging 240+ acres

Top Virginia-grown/raised food products: Chickens/broilers/turkeys, soybeans, peanuts, tomatoes, grapes/wine, specialty crops
Virginia-grown natural products resources: soybeans, tobacco, grain corn, cotton, wheat, hay, barley, sorghum, greenhouse/nursery products

Assets:

- ✦ **Diverse local industry** includes production, processing, packaging and machinery
- ✦ **University-corporate research partnerships available.** Ongoing: chickpeas, sorghum, biodegradable packaging, etc.
- ✦ **Skill development/training** via local university degrees in food science, logistics, and industrial technology
- ✦ **Customize your workforce training program** with the Community College Workforce Alliance
- ✦ **Food and beverage manufacturing workers:** 7,100 with \$39,462 average wage
- ✦ **Access to 40% of the U.S. market** for food within one day's drive
- ✦ **Experienced construction partners** for food-grade facilities and fast-tracked process for fast time-to-market

Sample Relevant Occupations

Occupation	Total Currently Employed*	Total Looking For Work*
Packaging and Filing Machine Operators and Tenders	21,864	1,836
Food Batchmakers	3,564	207
Laborers and Freight, Stock and Material Movers	12,394	1,140
Inspectors, Testers, Sorters, Samplers and Weighers	10,208	794
Packers and Packagers	19,487	1,472

Notes: 45-min workforce commute area | *Includes workers in related occupations that can be easily retrained for this occupation | Data Q2 2016

Top Industry Employers

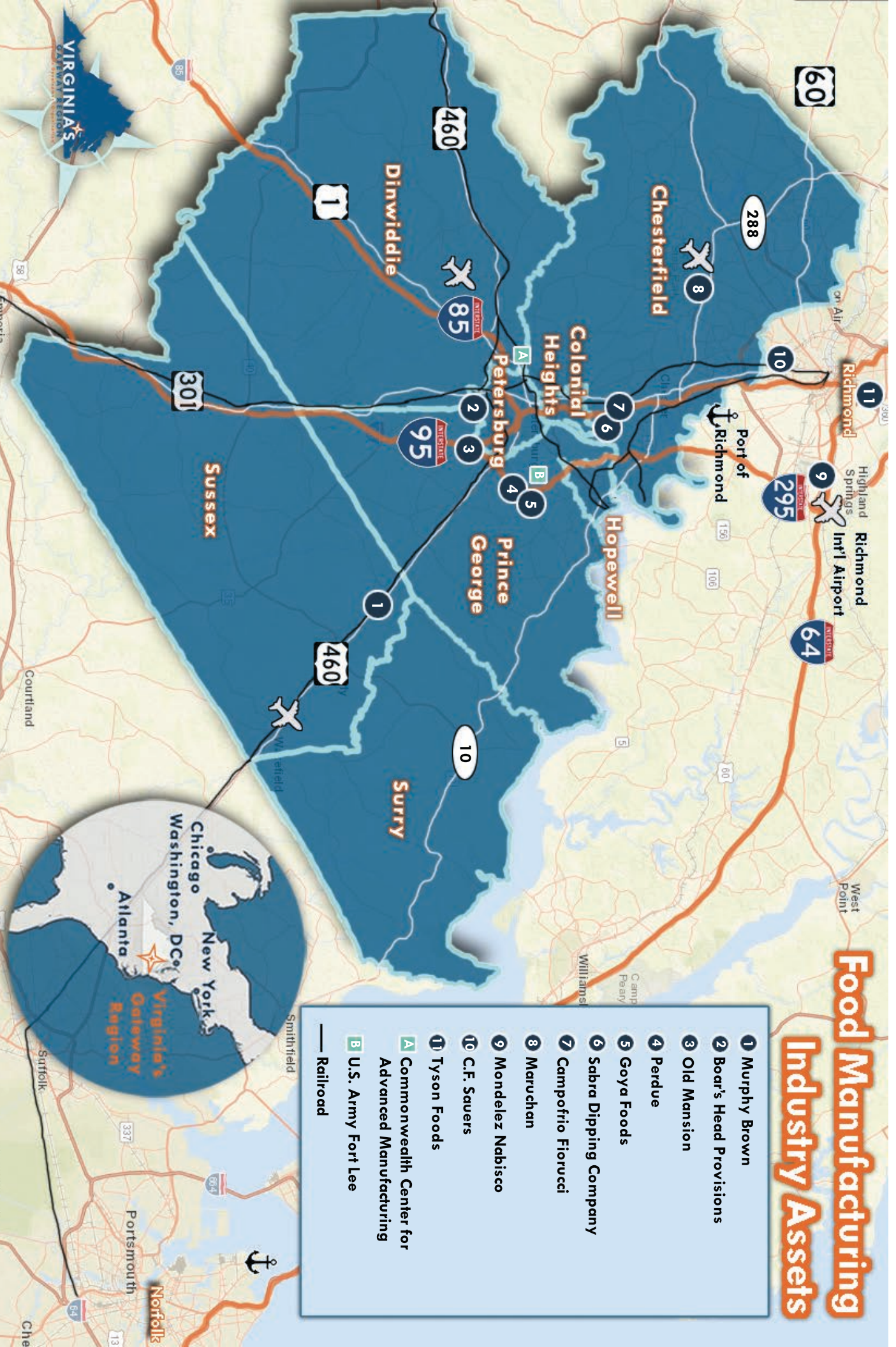
Company	Product/Service	Employees
Hillphoenix	Refrigerated Display Cases	945
Tyson Foods	Poultry Products	850
Mondelez	Cookies and crackers	580
Perdue Foods	Poultry Products	550
Sabra Dipping Company	Hummus and vegetable dips	504
Campofrio Food Group	Italian specialty meats	450
Maruchan	Ramen soups and noodles	450
Boar's Head Provisions	Deli meats and dressings	400
Ukrop's Homestyle Foods	Bakery	390

Data Q3 2016



Food Manufacturing Industry Assets

- 1** Murphy Brown
- 2** Boar's Head Provisions
- 3** Old Mansion
- 4** Perdue
- 5** Goya Foods
- 6** Sabra Dipping Company
- 7** Campofrio Fiorucci
- 8** Maruchan
- 9** Mondelez Nabisco
- 10** C.F. Sauers
- 11** Tyson Foods
- A** Commonwealth Center for Advanced Manufacturing
- B** U.S. Army Fort Lee
- Railroad





Logistics & Distribution

With a strategic location at the mid-point of the East Coast and home to world-class infrastructure for distribution by road, rail, air and sea, the Gateway Region is a premier location for logistics operations. The region also hosts the U.S. Army's global logistics operations and training facilities, key distribution centers for Fortune 500 companies, and a logistics-ready workforce, making it an easy choice for globally-focused supply chains and distributors.

40%

U.S. Population within 500 miles



Interstates 95, 85, 295, 64 and U.S.

20

Miles (32 km) from Richmond Marine Terminal

#1

Best Place to Locate a Warehouse
Chesterfield County
Material Handling & Logistics, 2015

Assets:

- ★ **Freight hubs** for UPS, FedEx and USPS available and home to major LSLs and 3PLs including Estes Express Lines, Grayson Mitchell Inc., Abilene Motor Express and more
- ★ **International container shipping** via the Port of Virginia, the deepest natural harbor on the East Coast, which has sea terminals within 1.5-hour drive or a barge terminal within 30-minute drive
- ★ **Rail-served sites and buildings available**, or access a **high concentration of transload facilities**
- ★ **Foreign trade zones** reduce costs of international trade in the region
- ★ **Transport goods and travel by air** via Richmond International Airport, which reaches 50% of U.S. Population within 24 hrs. or Washington Dulles International Airport (340 weekly departures)
- ★ **General aviation airports** and attached industrial park and hangar space available
- ★ **Worker training available** for supply chain management and Logistics Engineering and Technology via area universities
- ★ **Army Logistics University** based in the region trains all US Military logisticians, many enter regional workforce
- ★ **Local logistics research partnership:** Commonwealth Center for Advanced Logistics Systems

Sample Relevant Occupations:

Occupation	Total Currently Employed*	Total Looking For Work*
Laborers and Freight, Stock and Material Movers	12,394	1,140
Industrial Truck & Tractor Operators	23,786	1,700
Stock Clerks & Order Fillers	82,908	5,566
Packers and Packagers, Hand	19,487	1,473
Heavy and Tractor-Trailer Truck Drivers	14,574	581

Notes: 45-min workforce commute area | *includes workers in related occupations that can be easily retrained for this occupation | Data Q2 2016

Top Industry Employers:

Company	Product/Service	Employees
Amazon.com	E-commerce fulfillment	3,800
Defense Logistics Agency	Defense supplies contracting	2,318
United Parcel Service (UPS)	Mail & 3PL	2,490
Walmart Distribution Center	Department store distribution	800
Food Lion Distribution Center	Grocery Distribution	500

Sources: Times-Dispatch; InfoGroup; Virginia Employment Commission; VGR internal research, 2016

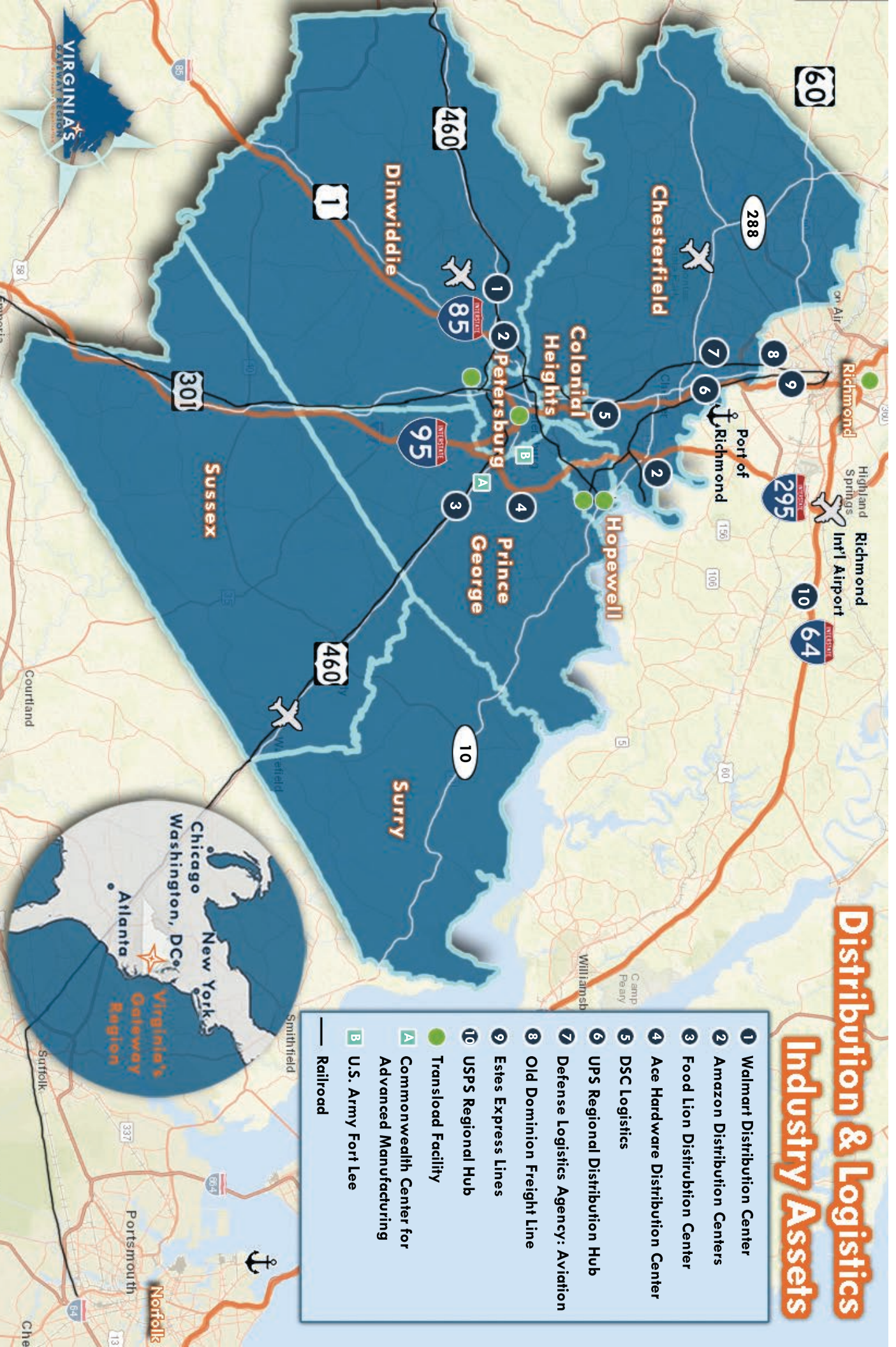


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Distribution & Logistics Industry Assets

- 1 Walmart Distribution Center
- 2 Amazon Distribution Centers
- 3 Food Lion Distribution Center
- 4 Ace Hardware Distribution Center
- 5 DSC Logistics
- 6 UPS Regional Distribution Hub
- 7 Defense Logistics Agency: Aviation
- 8 Old Dominion Freight Line
- 9 Estes Express Lines
- 10 USPS Regional Hub
- Transload Facility
- A Commonwealth Center for Advanced Manufacturing
- B U.S. Army Fort Lee
- Railroad



VIRGINIA'S
GATEWAY REGION

