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HIGHLIGHTS OF THE ECONOMY OF THE BRUNSWICK-WAYCROSS AREA

by

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Foreword

The rapid economic change which is taking place throughout Georgia is clearly in evidence in the 10-county area which forms the focus of this report. In the midst of such change it is important that the various segments of the area's economy be kept in perspective. The purpose of this report is to provide an objective analysis of the present structure of the area's economy.

Staff members of the Industrial Development Division have played a key role in the major economic developments which have occurred in this section of the State in recent years -- the location of new State dock facilities at Brunswick, and Thiokol Chemical Corporation's decision to locate a "space-age" manufacturing plant in Camden County.

It was August 9, 1961 when the writer and Dr. George Whitlatch, the Division's Senior Research Scientist, met officials of the Thiokol Chemical Corporation at the Jacksonville airport to take them for the first time to see the area where they later decided to locate their plant. Hindsight now indicates that this trip was the key to their coming to Georgia rather than going elsewhere. While the magnitude of the facilities which may be built remains uncertain, it appears definite that that day's work projected the southeast Georgia area into the space age.

The recent decision of the Georgia Ports Authority to acquire Colonel's Island as an industrial site also is a direct - if long delayed - result of the Industrial Development Division's research and recommendations regarding the Brunswick area's industrial potentials. Prepared under contract with city, county and port officials, previous studies which the Division has made point up the Brunswick area as having one of the finest growth potentials in the State.

This quick overall view of the area's economy will, it is hoped, be useful in the further development efforts which are bound to be expanded in the months immediately ahead. Questions and comments are invited.

Kenneth C. Wagner, Chief
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INTRODUCTION

A recent "Salute to Georgia" by TV star Perry Como opened with a tongue-in-cheek "cotton pickin'" skit. The show then shifted suddenly to actual films of metropolitan Atlanta and well-selected samples of scenic beauty and economic advance throughout Georgia. The perceptive viewer was thus afforded a startling visual contrast between the cotton field stereotype and a series of scenes suggestive of today's drastically reduced role of agricultural staple crops in the State's economy.

To put agriculture in perspective is not to be "against" it or to deny its essentiality. A thriving, sound agriculture is unquestionably vital to Georgia's well-being. Its inputs and outputs are intimately related to other segments of the State's economy in many ways, just as the inputs and outputs of other important industries are interrelated. But its relative importance, particularly as a prime mover and as a source of employment, is too often overstated. Analysis of recent Census of Population data shows that manufacturing alone now provides far more jobs than does agriculture in most Georgia counties.

The present study focuses on a 10-county area in southeastern Georgia within the trading areas of two cities of medium size, Brunswick and Waycross. Five of the counties in this area have more agricultural than manufacturing employment, and the area as a whole still has a stronger agricultural orientation than does the State as a whole. However, dynamic forces of change are transforming the economy here, too, and in the 10-county area agricultural employment is barely half the manufacturing employment total.

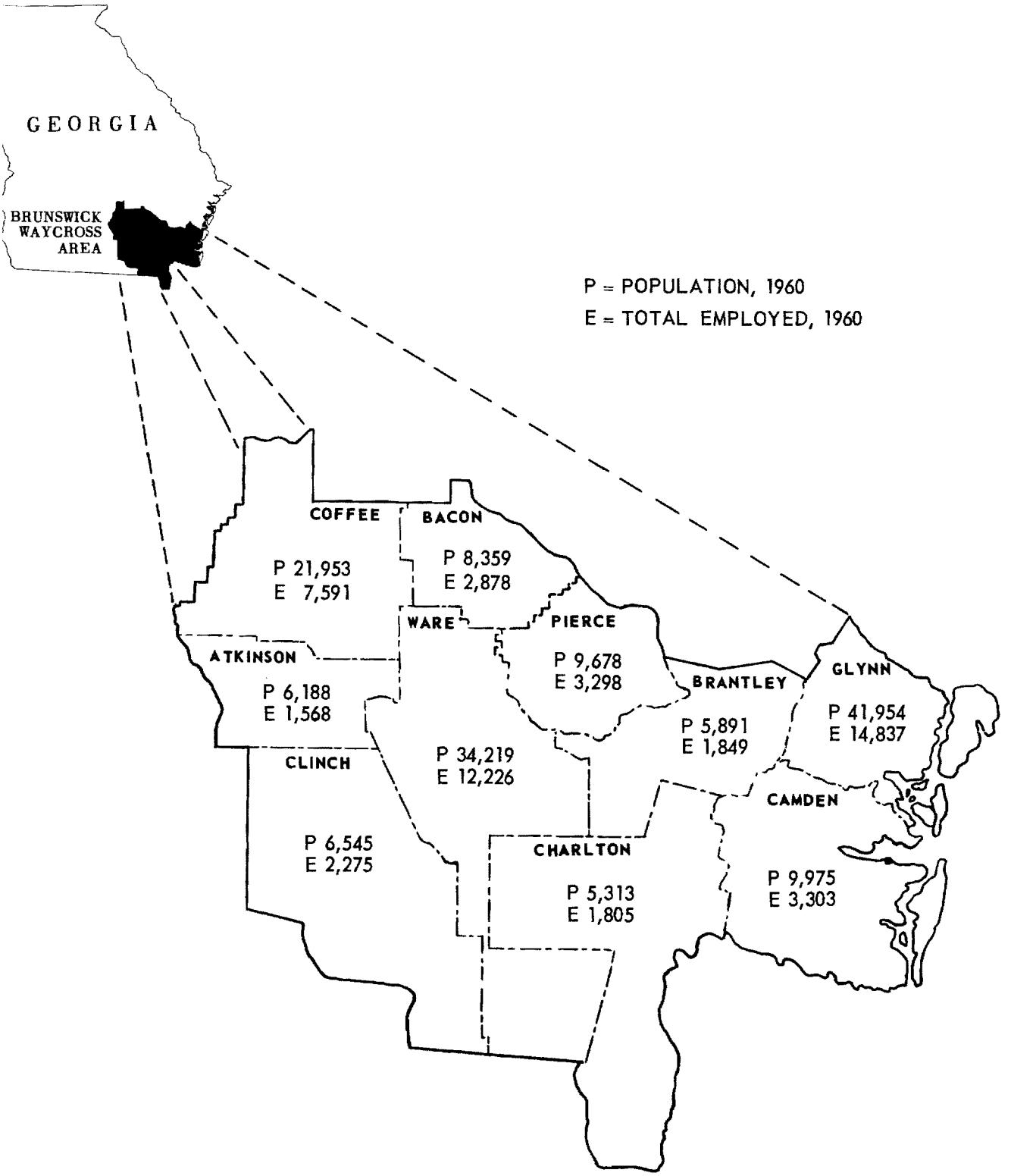
More and more of the Brunswick-Waycross area's people are moving into nonfarm jobs. Better retraining facilities are definitely on the way. Space-age industries are beginning to take a look. Already endowed with an excellent climate, several southeastern Georgia communities are adding the amenities that appeal to engineers, other professionals, technicians and tourists.

POPULATION AND EMPLOYMENT

Map 1 focuses on 10 selected counties in southeastern Georgia and shows the 1960 population and resident employment in each county. The Brunswick area (Camden County and Glynn County) had a total employment of 18,140 in 1960. A total of 33,490 people were employed in the eight-county Waycross area (Atkinson, Bacon, Brantley, Charlton, Clinch, Coffee, Pierce and Ware counties). For the entire 10-county area, total employment in 1960 was 51,630.

MAP 1

POPULATION AND EMPLOYMENT IN THE BRUNSWICK-WAYCROSS AREA



DISTRIBUTION OF EMPLOYMENT BY INDUSTRY IN THE BRUNSWICK-WAYCROSS AREA

Chart 1 shows the percentage distribution by industry of all employment by place of residence in the 10-county Brunswick-Waycross area.[1/] Some 12,000 residents were employed in manufacturing in 1960, as compared with 8,112 in retail trade, 6,469 in personal and recreational services,[2/] and 6,147 in agriculture. Other employment categories which accounted for 4% or more of the 1960 total include transportation, communications and public utilities (4,287); construction (2,875); educational services (2,500); and business and professional services (2,243).[3/] These eight categories combined represented more than 86% of total employment in 1960.

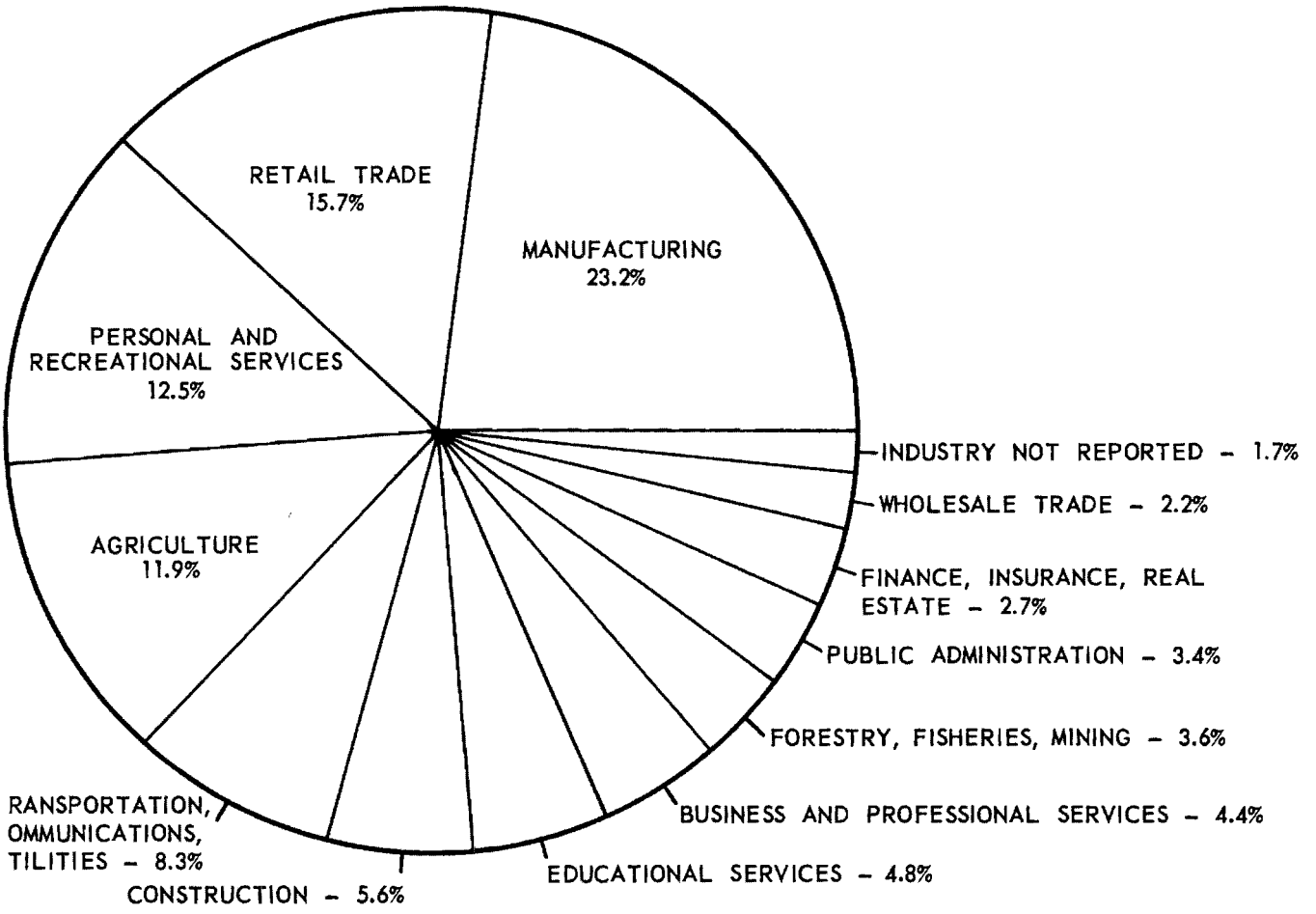
1/ "Brunswick-Waycross area" includes Atkinson, Bacon, Brantley, Camden, Charlton, Clinch, Coffee, Glynn, Pierce, and Ware counties.

2/ "Personal and recreational services" comprise repair services, private households, hotels, motels, laundry and dry cleaning services, and entertainment and recreation services.

3/ "Business and professional services" include advertising, accounting, auditing, and bookkeeping services; welfare, religious, and nonprofit membership organizations; hospitals; and other professional and related services (except educational).

CHART 1

DISTRIBUTION OF EMPLOYMENT BY INDUSTRY IN THE BRUNSWICK-WAYCROSS AREA, 1960



SOURCE: U.S. Census of Population

DISTRIBUTION OF EMPLOYMENT BY INDUSTRY IN THE BRUNSWICK AND WAYCROSS AREAS

Distribution of total employment by industry for the two-county Brunswick area[1/] and the eight-county Waycross area[2/] is shown in Chart 2. Over 31% of the Brunswick area's 18,140 employed had jobs in manufacturing in 1960. Other leading categories were retail trade and personal and recreational services, each with about 16% of the total. All of the remaining industries accounted for less than 10% each. Construction (6.4%), business and professional services (5.5%), and transportation, communications and public utilities (5.4%) were the leaders in these intermediate categories. Agriculture and the extractive industries (forestry, fisheries and mining) were among the least important sources of employment.

The Waycross area had a total employment of 33,490 in 1960, including almost 19% in manufacturing, over 17% in agriculture, 15.6% in retail trade, and almost 11% in personal and recreational services. Employment in transportation, communications and public utilities was just under 10% of total employment. Other categories of intermediate size were educational services (5.2%) and construction (5.1%).

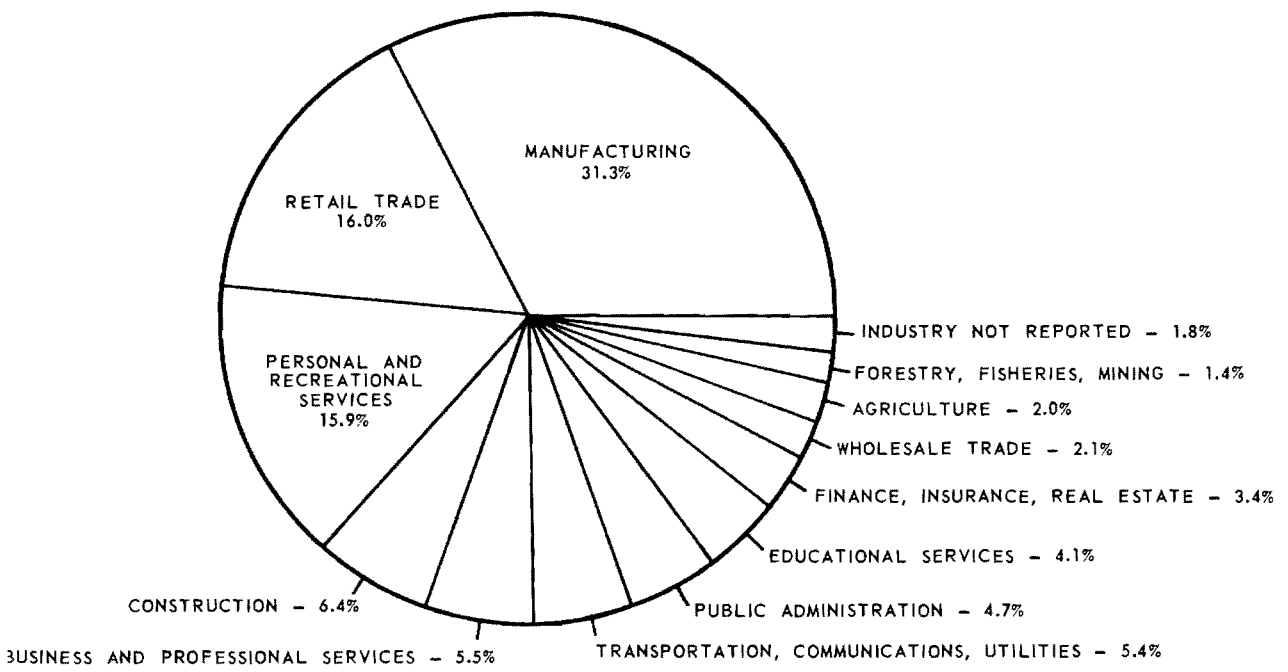
1/ "Brunswick area" includes Camden and Glynn counties.

2/ "Waycross area" includes Atkinson, Bacon, Brantley, Charlton, Clinch, Coffee, Pierce, and Ware counties.

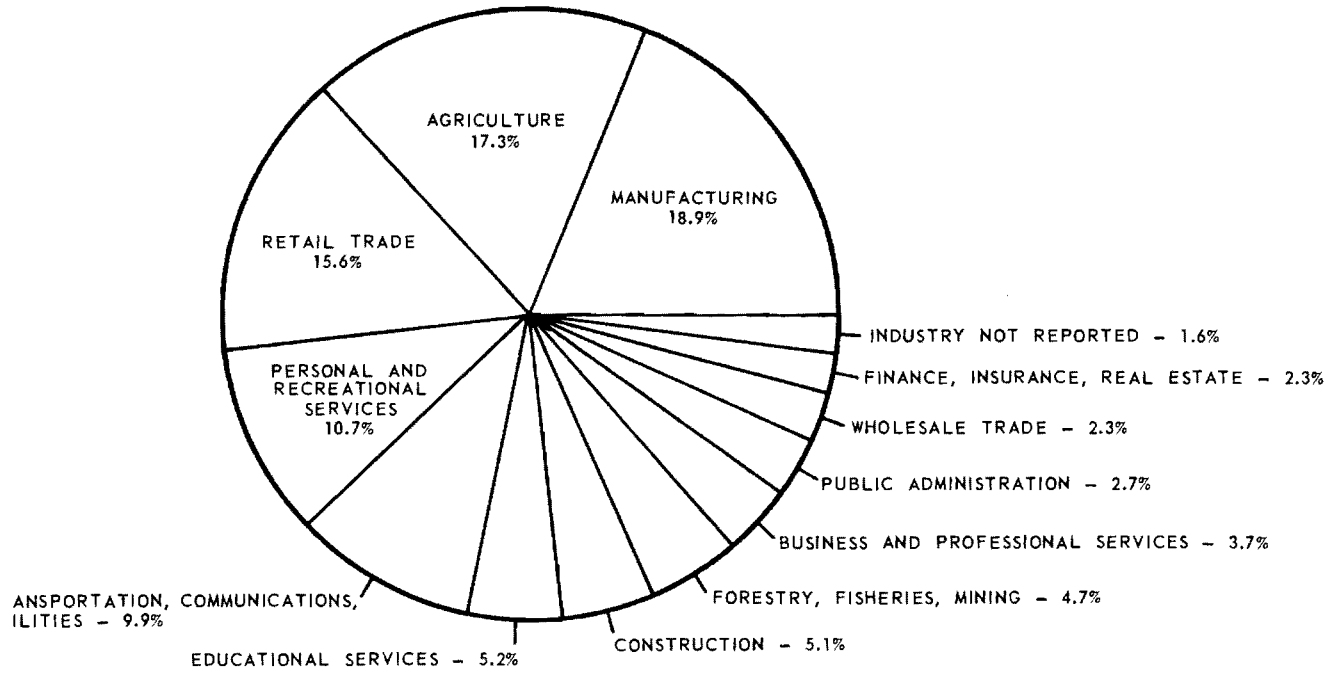
CHART 2

DISTRIBUTION OF EMPLOYMENT BY INDUSTRY IN THE BRUNSWICK AND WAYCROSS AREAS, 1960

BRUNSWICK AREA



WAYCROSS AREA



SOURCE: U.S. Census of Population

DISTRIBUTION OF EMPLOYMENT BY INDUSTRY: AREA, STATE AND NATIONAL COMPARISONS

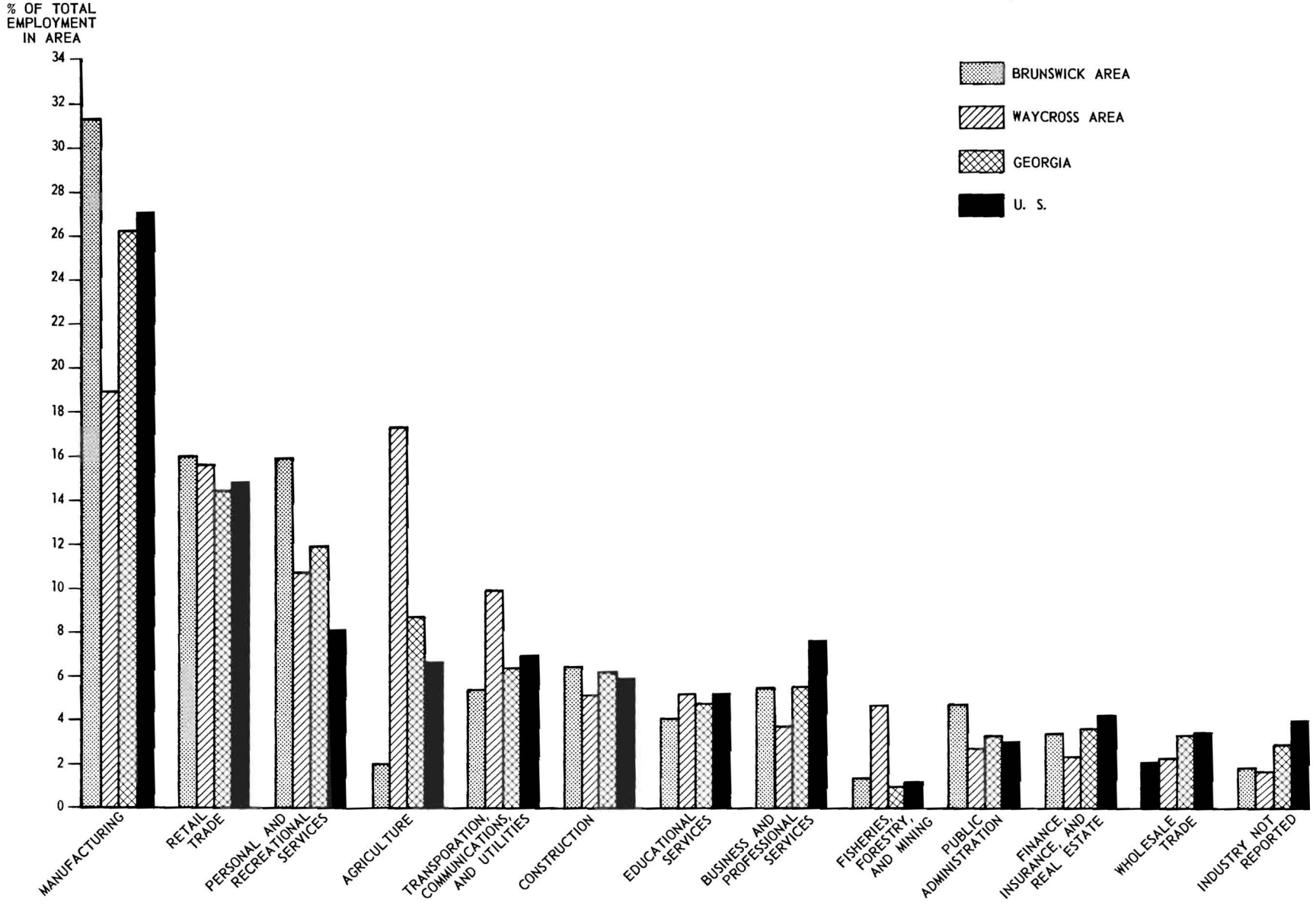
Chart 3 provides a comparison of the employment composition in the Brunswick area and the Waycross area with that in Georgia and the United States as a whole.

The Brunswick area has an outstandingly large proportion of manufacturing employment. To lesser degrees, personal and recreational services, construction, and retail trade stand higher in the Brunswick area profile than in those of the other areas. Relative to the national and all-Georgia structures, the two-county area has small shares of its total employed in wholesale trade, educational services, transportation, public administration, and finance. It has a very low share (2%) in agriculture. Its percentage in business and professional services equals the Georgia average, but falls short of the national average.

The Waycross area has comparatively large shares of its total engaged in agriculture, transportation, and forestry. Agriculture is second only to manufacturing and represents 17.3% of its total. This is almost double the all-Georgia ratio and contrasts with 6.6% for the country as a whole. The unusually high percentage in transportation, communications and utilities is due largely to the presence of the Atlantic Coast Line shops in Waycross. Comparatively small percentages are employed in manufacturing, construction, public administration, finance, and business and professional services, although manufacturing is the largest single category. The Waycross area percentage in educational services is on a par with the national average and is higher than the all-Georgia ratio. The area's percentages in the other categories are not notably high or low.

CHART 3

DISTRIBUTION OF EMPLOYMENT BY INDUSTRY IN BRUNSWICK AND WAYCROSS AREAS, COMPARED WITH GEORGIA AND THE UNITED STATES, 1960



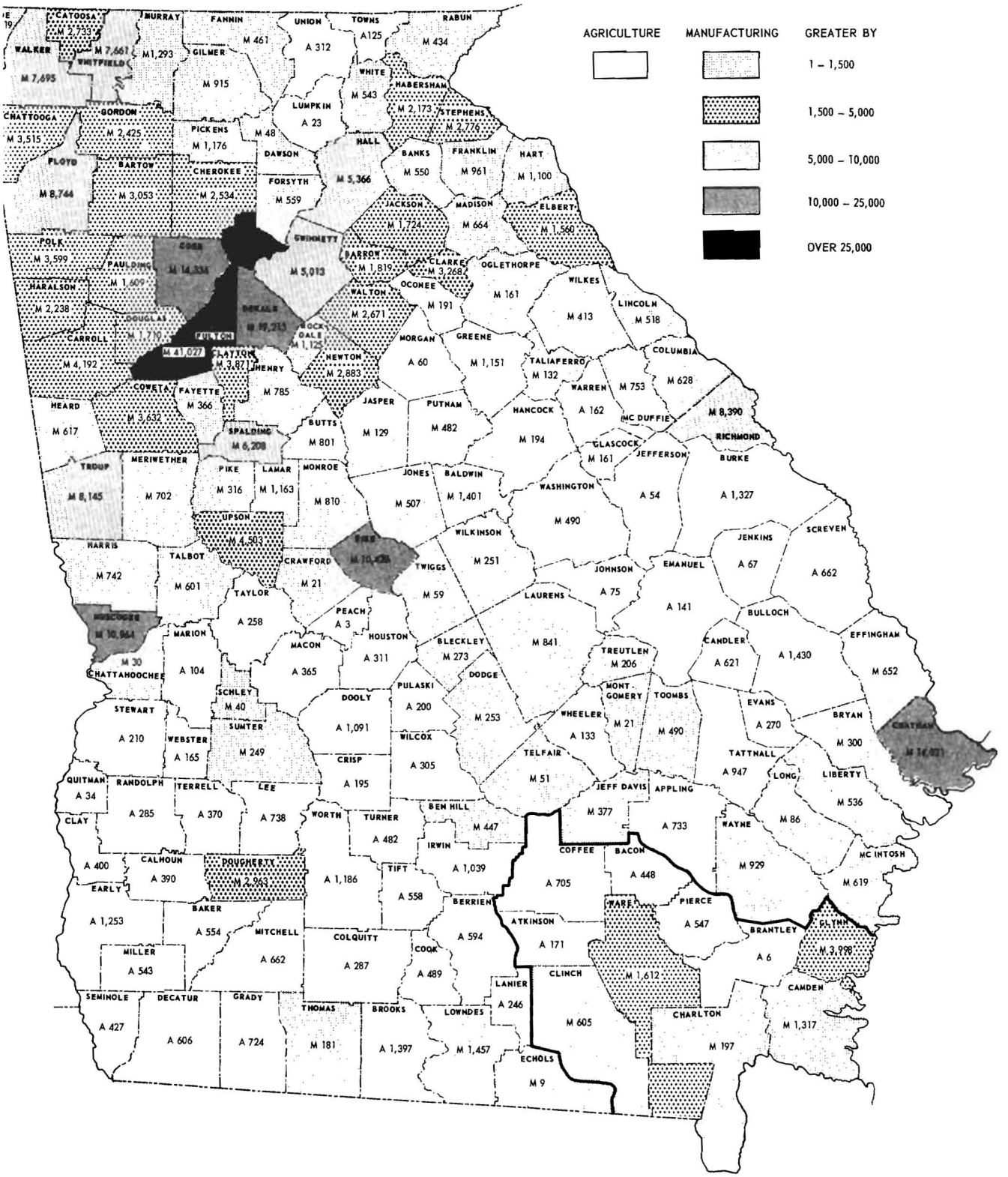
AGRICULTURAL AND MANUFACTURING EMPLOYMENT COMPARED

Map 2 compares agricultural and manufacturing employment in Georgia by county of residence. Manufacturing leads agriculture in 104 of the State's 159 counties. Within the 10-county area examined in the present study, manufacturing employment is greater in five counties -- including both counties in the Brunswick area and three counties in the Waycross area (Charlton, Clinch, and Ware). It is almost equal to agricultural employment in Brantley County. Total manufacturing employment in the 10-county area is almost twice as great as agricultural employment.

MAP 2

PREDOMINANCE OF MANUFACTURING OR AGRICULTURAL EMPLOYEES, 1960

(by place of residence)



DISTRIBUTION OF MANUFACTURING EMPLOYMENT BY INDUSTRY

Table 1 compares the distribution of manufacturing employment by industry in the Brunswick area and the Waycross area with the distribution in Georgia and the nation. Of the 12,000 residents of the 10-county area employed in manufacturing in 1960, about 65% were in nondurable goods manufacture. This approximates the all-Georgia percentage (66.4) and far exceeds the national average (43.9%).

Leading industry groups in the area include food and kindred products (about 18% of total manufacturing employment); chemical and allied products (about 11%); pulp, paper and other nondurables (over 27%); and furniture, lumber and other wood products (about 24%). Three of Georgia's prominent manufacturing industry groups are of only minor importance in the 10-county area: textiles, apparel and transportation equipment.

The 10-county area has over 30 manufacturing firms employing 100 or more persons. Major products or product classifications of the area's outstanding manufacturing employers are listed below.

Industry Group	Product or Product Classification
Food Products	Processed poultry, eggs; frozen crab meat, shrimp and other seafoods; processed seafood; shelled and packaged pecans
Tobacco Products	Cigars
Textile Mill Products	Papermakers' dryer felts
Apparel	Ladies' apparel, including girdles, brassieres, outerwear; children's outerwear
Wood Products	Dressed lumber, pine flooring; wire-bound boxes
Pulp and Paper	Bleached and unbleached sulphate pulp; kraft paper, paper bags
Chemical and Allied Products	Caustic soda, chlorine gas; naval stores
Leather Products	Shoes -- infants', youths' and men's
Stone, Clay and Glass Products	Gypsum building materials
Fabricated Metal Products	Fabricated steel boilers and parts
Machinery	Hand sprayers; tools and machine repair
Transportation Equipment	Pleasure boats, wood and fiberglass; mobile homes

Table 1

DISTRIBUTION OF MANUFACTURING EMPLOYMENT BY INDUSTRY, BRUNSWICK AND WAYCROSS AREAS, GEORGIA AND U. S. TOTALS, 1960

(By place of residence)

Manufacturing Category	Brunswick Area	Waycross Area	Ten-County Area	State of Georgia	(000) U. S. Totals
			Employment		
Manufacturing total	5,681	6,318	11,999	364,621	17,513
Durable goods:	1,248	2,973	4,221	122,565	9,829
Furniture, lumber, wood products	529	2,380	2,909	45,565	1,067
Primary metals	4	0	4	5,278	1,225
Fabricated metals	279	205	484	9,451	1,292
Machinery, nonelectrical	77	151	228	10,236	1,568
Electrical machinery	8	22	30	7,300	1,487
Motor vehicles and equipment	0	9	9	11,781	842
Transportation equipment, except motor vehicles	40	140	180	15,640	977
Other durables	311	66	377	17,314	1,371
Nondurable goods:	4,433	3,345	7,778	242,056	7,684
Food and kindred products	1,260	885	2,145	44,650	1,822
Textiles	0	189	189	94,614	954
Apparel	100	399	499	46,902	1,159
Printing, publishing	130	192	322	14,159	1,141
Chemical and allied products	1,190	149	1,339	13,966	865
Other nondurables	1,753	1,531	3,284	27,765	1,743
			Per cent of total employment		
Durables, total	21.97	47.06	35.18	33.61	56.12
Furniture, lumber, wood products	9.31	37.67	24.24	12.50	6.09
Other durables	12.66	9.39	10.94	21.11	50.03
Nondurables, total	78.03	52.94	64.82	66.39	43.88
Food and kindred products	22.18	14.01	17.88	12.25	10.41
Textiles	0	2.99	1.58	25.95	5.45
Apparel	1.76	6.32	4.16	12.86	6.62
Printing, publishing	2.29	3.04	2.68	3.88	6.52
Chemical and allied products	20.95	2.36	11.16	3.83	4.94
Other nondurables	30.85	24.22	27.36	7.62	9.94

Source: U. S. Census of Population

EMPLOYMENT TRENDS

Total employment in the 10-county Brunswick-Waycross area increased about 11.5% from 1950 to 1960, as compared with about 10.4% in Georgia and 14.5% nationally. Every industry except agriculture, forestry, fisheries and mining has risen in importance since 1950, relatively as well as in absolute terms.

Most employment changes by industry in the area from 1950 to 1960 were in the same direction as national and all-Georgia changes, but there were certain marked differences in degree. The area's percentage gains were greater than statewide and national percentage gains in every category except construction and miscellaneous ("industry not reported"). Its rate of loss in forestry, fisheries and mining exceeded the statewide and national loss rates. Agricultural employment declined more sharply in Georgia than in the study area, but the latter's rate of decline was somewhat greater than that for the country as a whole.

Over the decade, total employment increased by less than 1% in the eight-county Waycross area and by almost 39% in the two-county Brunswick area. The more rapid advance of the smaller area can be ascribed to both "composition" effects and "competitive" effects. Composition effects relate to the character of each area's employment structure at the beginning of the trend period. Competitive effects relate to each area's employment gains in particular industries during the period.

Less than 6% of the Brunswick area's jobholders were employed in agriculture, forestry, fisheries and mining in 1950. Therefore, its absolute job losses between 1950 and 1960 in these declining industries were minor. By contrast, the Waycross area had 13,739 workers, or 41.3% of its total, in these same industries in 1950. It lost 6,380 of these jobs in the ensuing 10 years.

The Brunswick area had impressive competitive gains from 1950 to 1960. Despite its much smaller population in 1950 -- less than 37% of the Waycross area's -- it had a gross gain of 5,241 jobs, as against 6,660 for the larger and more populous area. Its absolute job gains in business and professional services and in public administration exceeded those of the Waycross area. Its percentage gains in these industries and in five others -- finance, insurance, and real estate; educational services; retail trade; transportation,

communications and utilities; and personal and recreational services -- were better than those for the Waycross area, the state, and the nation as a whole. The Waycross area had higher rates of increase in manufacturing and wholesale trade.

The largest absolute gains for the Brunswick area were in manufacturing, retail trade, and personal and recreational services, in the order named. These industries also provided the largest gains in the Waycross area. But this area's combined losses in agriculture and the extractive industries wiped out the great bulk of its increases in manufacturing, plus all increases in nine other categories. Charts 4 and 5 show employment by industry for 1950 and 1960 in the Brunswick area and the Waycross area, respectively.

In the 10-county area, agricultural job losses were greater than the gains in manufacturing or any other one category. Gains in each of four nonfarm industries exceeded losses in the extractive industries. Absolute changes by industry are shown below.

Total, net	5,330
Manufacturing	4,423
Retail trade	1,981
Personal and recreational services	1,255
Business and professional services	1,022
Educational services	814
Finance, insurance and real estate	624
Transportation, communications and utilities	618
Public administration	596
Wholesale trade	334
Construction	234
Miscellaneous (industry not reported)	-42
Forestry, fisheries and mining	-946
Agriculture	-5,583

CHART 4

EMPLOYMENT TRENDS IN THE BRUNSWICK AREA, 1950–1960

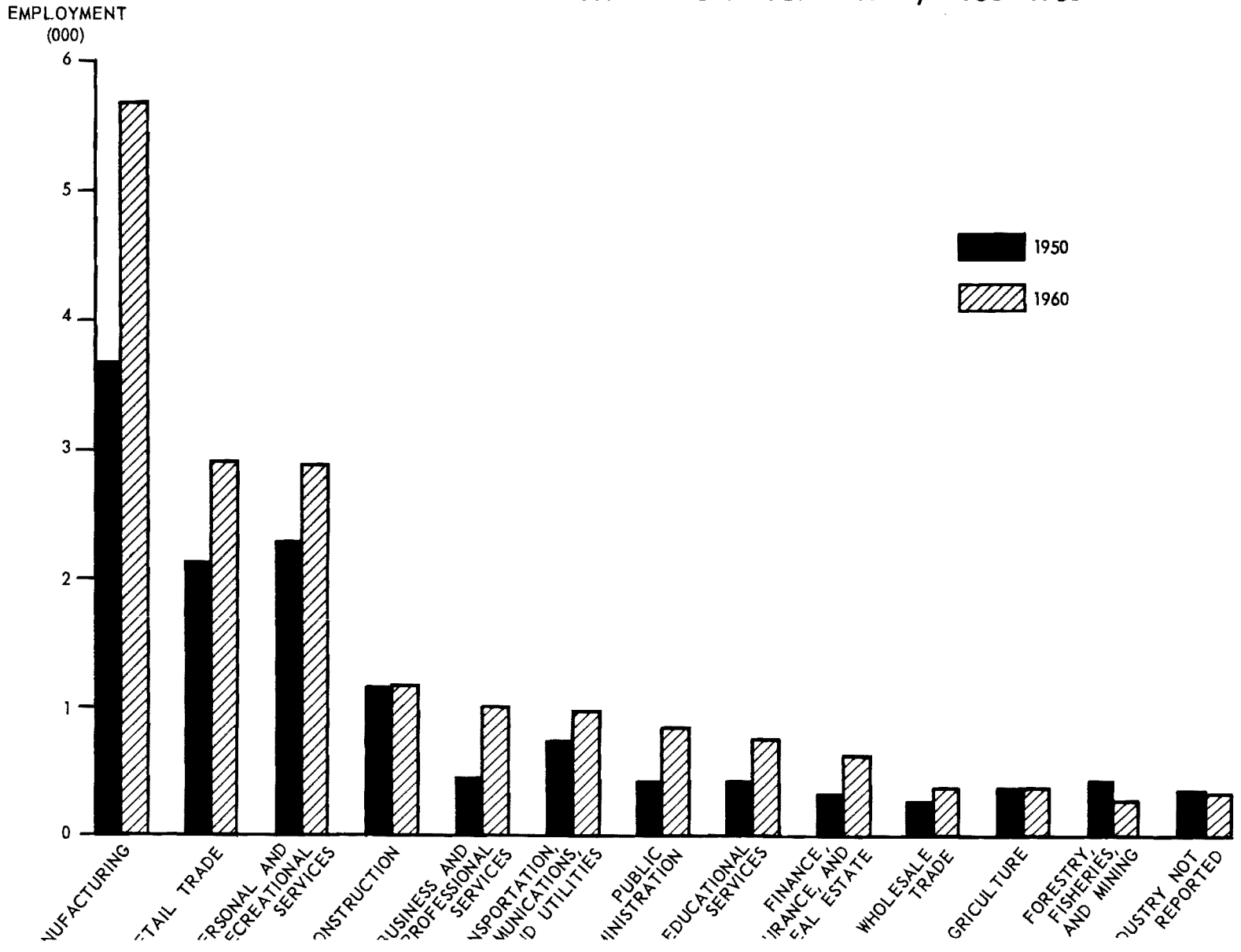
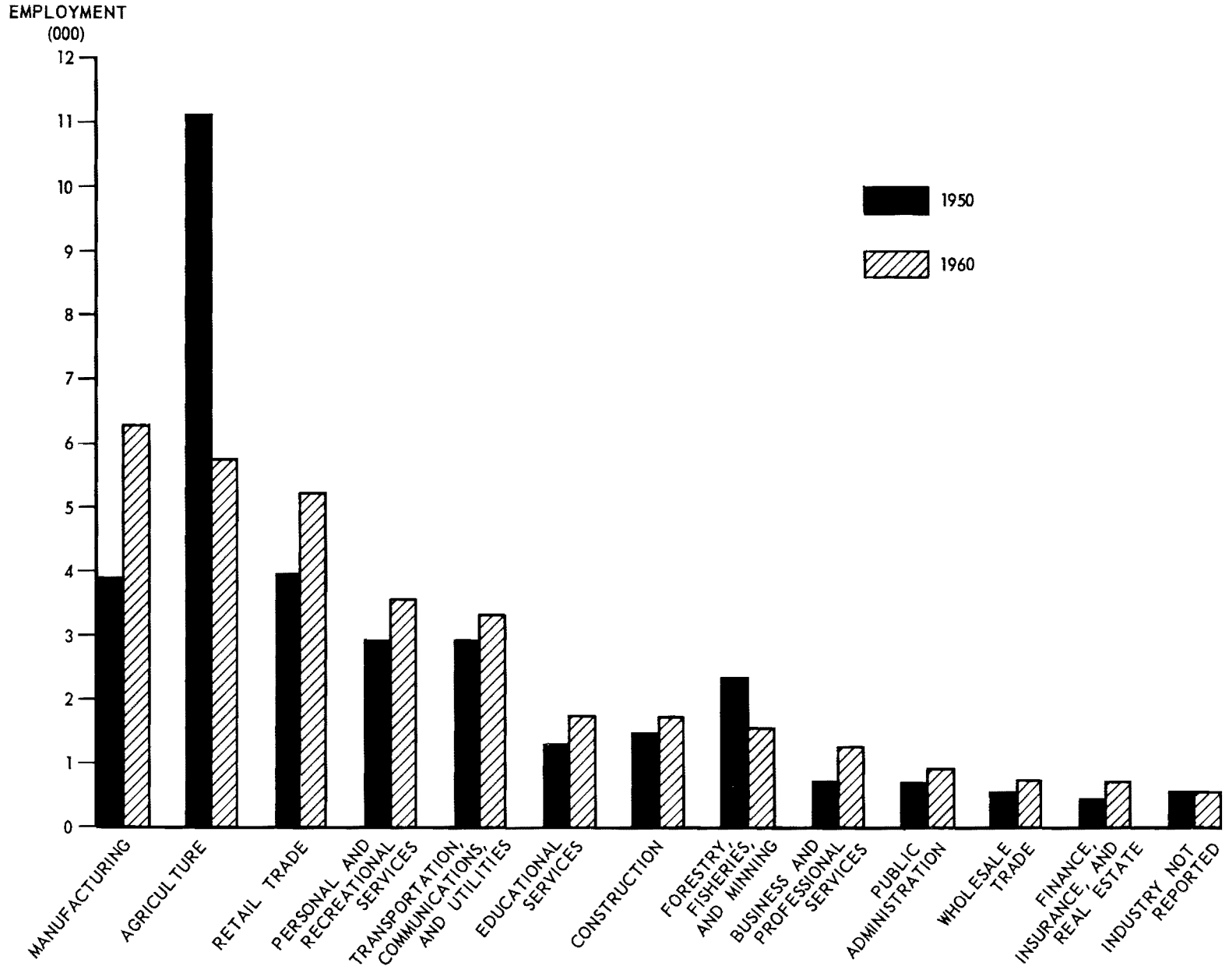


CHART 3

EMPLOYMENT TRENDS IN THE WAYCROSS AREA, 1950–1960



A PRELIMINARY EVALUATION OF THE BRUNSWICK-WAYCROSS AREA ECONOMY

The economy of the 10-county Brunswick-Waycross area is becoming increasingly strong and diversified. The drag of the regressive parts of its employment structure (agriculture, forestry, and other extractive industries) is diminishing, while manufacturing and other industries associated with continuing economic advance now account for some 83% of the area's total employment as compared with less than 60% in 1940.

Unpublished nationwide employment studies and projections indicate that certain categories of nonfarm employment are expected to grow more rapidly than the nonfarm average between now and 1975. These include trade, services, finance and construction. These growth industries now make up about 51% of the Brunswick-Waycross area total, as compared with about 42% in 1950. The same group accounted for over 54% of the national totals in 1960 and over 50% in 1950. This is one indication that the 10-county area's employment structure is improving relative to that of the nation as a whole.

Manufacturing employees living in the Brunswick-Waycross area are strongly oriented to the nondurable goods industries, including especially pulp and paper, food products and chemicals. A large portion of durable goods employment is in the woodworking industries. Nondurables predominate in both the Brunswick area and the Waycross area, but their dominance is much greater in the former.

The durable-nondurable distribution pattern in the 10-county area is quite similar to the all-Georgia pattern, but it differs in detail within these broad groups. The local area's pattern varies radically from the national composition, in which the woodworking industries are of minor importance and other durables are outstanding. The 10-county area's structure is generally less vulnerable to recessions than is the national structure.

Viewed as a whole, the 10-county area is a comparatively underdeveloped and low-income section of Georgia. It has higher proportions of the State's land area, land in farms, and factories than its proportion of the State's population. Its shares of high school enrollment and housing units are also somewhat higher. But its shares of total jobs, manufacturing jobs, aggregate income, and bank deposits are moderately to significantly lower than its share of people. It is still much more strongly oriented to agriculture

than is Georgia as a whole, but its share of agricultural employment and of farm products sales receipts is lower than its share of land in farms.

Viewed separately, the two areas exhibit significant differences. The two-county Brunswick area shows many of the typical characteristics of a rapid-growth and urbanized area -- relatively high shares of factories and manufacturing jobs and a per capita income above the Georgia average. Its agricultural orientation is very low even by national standards. The Waycross area is still one of relatively low income and above average dependence on agriculture, especially in the rural counties surrounding Ware.

Among the major underdeveloped potentials of the southeastern Georgia area are those associated with the tourist industry. Tourism potentials are particularly significant for Brunswick and nearby islands and in connection with the vast Okefenokee Wildlife Refuge. Even at present, tourist expenditures in these areas are generally considered to provide a real boost to retail trade volume.

Metalworking and chemical processing industry potentials center about the nucleus of mechanics, metal craftsmen, and other skilled workers in Waycross, the new Waycross Area Vocational-Technical School, and the Port of Brunswick, with its fine natural harbor and existing chemical "breeder" industries. Ample electric power is already available for major industrial expansion. Subject to approval by the Federal Power Commission, construction of a natural gas line to serve Brunswick, Waycross and many other communities of the area is expected to begin in 1963.