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The Economic Impact of the Home Furnishings Industry in the Triad Region of North Carolina

by

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May, 2007

Introduction

This report, consisting of two parts, estimates the magnitude and economic influence associated with the overall home furnishings industry throughout the *Triad Region* of North Carolina, with emphasis upon the *High Point Area*. This analysis is the first study of its kind to measure the scale and impact of furniture-related industries throughout the *Triad Region*, and provides a benchmark for further research into the subject.*

Part One of this report estimates the economic impact of the furniture industry cluster throughout the *Triad and High Point areas* of North Carolina for the year 2006. The furniture cluster consists of four expenditure categories: furniture manufacturing, major supporting industries, furniture wholesale and retail, and the International Home Furnishings Market. *The Triad Region* refers to Davidson, Forsyth, Guilford and Randolph counties, while the *High Point Area within the Triad Region* refers to the cities of High Point, Archdale, Trinity and Thomasville. The economic impact of the furniture cluster upon the *Triad Region* and the state is measured in terms of industry output and employment.

Part Two of this report contains a description of survey results of some of the industries in the Triad Region that support the furniture industry. Industries that have an impact on the furniture industry are easy to find. “Wood veneers” and “foam production” have a direct relation to the furniture industry, while some of the other industry groups are supportive of the industry and are less obvious. Our intention was to identify some of these pertinent industry groups, create a list of the companies in these areas, contact the companies, and then survey them about their relationship and support of the broader furniture industry.

* The authors would like to thank Dr. Anne Grube for her help in editing and organizing this report.

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Part One:

2006 Economic Impact of the Furniture Industry Cluster in the *Triad Region* and the *High Point Area*

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Executive Summary

This analysis calculates the economic impact of the furniture industry cluster in the *Triad Region* and the *High Point Area* of North Carolina. The *Triad Region* is based on the combined geographic area of Davidson, Forsyth, Guilford and Randolph counties. The *High Point Area within the Triad Region* refers to the cities of High Point, Archdale, Trinity and Thomasville. The furniture cluster includes furniture manufacturing, major supporting industries, furniture wholesale and retail, and the International Home Furnishings Market.

Some of the main results of this analysis are as follows:

- The furniture industry cluster contributes 20 percent or more of the total industry output produced in the *High Point Area*.
- The economic impact of the furniture cluster in the *High Point Area* upon the *Triad Region* is \$3.93 billion in industry output with almost 31,000 jobs.
- The core furniture-related industries—consisting of furniture manufacturing, wholesale and retail—create an economic impact upon the *Triad Region* of \$5.75 billion in industry output and 43,000 jobs.
- The economic impact of furniture manufacturing across the *Triad Region* is \$4.8 billion in industry output with almost 34,000 jobs.
- The economic impact of furniture wholesale and retail is almost a billion dollars in industry output with over 9,300 jobs across the *Triad Region*.
- The economic impact of the furniture cluster upon the *Triad Region* is \$8.25 billion in industry output and 65,362 jobs.
- The economic impact of the furniture cluster in the *Triad Region* upon the North Carolina economy is \$8.94 billion in industry output with more than 69,000 jobs.
- The *High Point Area* contributes 11 percent of the total output in the *Triad Region*.
- The *Triad Region* contributes 16 percent of the total industry output in North Carolina.
- The *Triad Region* contributes 21.55 percent of the state's manufacturing output and 16.57 percent of the state's manufacturing jobs.
- About 44 percent of the industry output in the *Triad Region* comes from manufacturing.
- Furniture and related product manufacturing is the largest manufacturing subsector in the *Triad Region* with over 16,000 jobs; furniture manufacturing generates 17 percent of the total manufacturing jobs in the four-county *Triad Region*.

Introduction

This analysis focuses upon the 2006 economic impact of the furniture industry cluster associated with the *Triad Region* and the *High Point Area within the Triad Region* of North Carolina. The *Triad Region*, in this analysis, is defined as the combined geographic area of Davidson, Forsyth, Guilford and Randolph counties.¹ The *High Point Area* is defined as the combined cities of High Point, Archdale, Trinity and Thomasville, based on zip code classifications.² The furniture cluster consists of four main categories of direct expenditures and employment:

- (A) Furniture and related product manufacturing
- (B) Major furniture-supporting industries
- (C) Furniture wholesale and retail, design, cleaning/repair
- (D) High Point International Home Furnishings Market (IHFM)

An important subset of the furniture cluster consists of furniture and related product manufacturing (category A) plus furniture wholesale and retail (from category C). This subset forms the core of the furniture cluster. Both the broad furniture cluster and the core furniture-related industries are examined in this economic impact study.

In addition to estimates regarding direct jobs and expenditures in the furniture cluster, additional multiplier effects generate further output and employment throughout the region and state. These impacts are referred to as indirect effects and induced effects. Indirect industry output and jobs among suppliers and other related business activity are triggered by direct expenditures in the furniture cluster. Examples of indirect impacts include trucking and other transportation of furniture, wood-related industries, fabrics, other furniture-related inputs and materials, packaging, warehousing, trade publications and associations, etc. The various indirect effects generated by direct expenditures in the furniture cluster are estimated in this economic impact analysis. Descriptions of the main direct and indirect industries, based on NAICS codes, are given in Appendix I-A of this report.³

Additionally, induced consumer spending occurs among households who are employed in the direct and indirect industries of the furniture cluster. Examples of induced expenditures by workers include health care, real estate, food, clothing, merchandise, insurance, auto-related spending, and various consumer goods and services. The induced effects are also estimated in the economic impact analysis.

¹ A broader definition of the *Triad Region* is the Greensboro/Winston-Salem/High Point Metropolitan Statistical Area, which consists of eight counties: Alamance, Davidson, Davie, Forsyth, Guilford, Randolph, Stokes and Yadkin. The narrower four-county definition of the *Triad Region* is used in this analysis because of the focus upon economic impact around the High Point vicinity.

² The *High Point Area* is defined as the geographic region consisting of nine zip codes associated with High Point, Archdale, Thomasville and Trinity: 27260, 27261, 27262, 27263, 27264, 27265, 27360, 27361, 27370.

³ The acronym NAICS denotes North American Industrial Classification System.

This analysis is organized as follows:

- The data sources and the economic impact methodology are described.
- Some of the key economic and population characteristics of North Carolina, the *Triad Region* and the *High Point Area* are described (Tables 1-3). A series of eight line charts and pie charts relating to these characteristics are included at the end of this analysis.
- The direct industry expenditures and jobs relating to each of the four categories in the furniture cluster are identified and estimated (Tables 4-8).
- The indirect industry output and jobs generated by the furniture cluster are identified and estimated (Table 9).
- The induced output and jobs generated by the furniture cluster are identified and estimated (Table 10).
- The overall economic impact of the furniture cluster upon the *Triad Region* is estimated for the year 2006 (Table 11).
- The economic impact generated by each of the four counties in the *Triad Region* is estimated for the year 2006 (Table 12).
- The economic impact of the core furniture-related industries, consisting of furniture manufacturing, wholesale and retail, upon the *Triad Region* and the state is estimated for the year 2006 (Table 13).
- The overall economic impact of the furniture cluster in the *Triad Region* upon the state of North Carolina is estimated for the year 2006 (Table 14).
- The main results of the economic impact analysis are summarized.

Data Sources and Methodology

Four main sources of industry data are utilized in this economic impact analysis: IMPLAN state and county industry datasets (MIG, Inc.), *County Business Patterns*, *Zip Code Business Patterns*, and the *US Economic Census*.⁴ The state and county industry information is obtained mainly from the IMPLAN datasets and to a lesser extent from *County Business Patterns* and the *US Economic Census*. The city level industry data is obtained from *Zip Code Business Patterns*. The most recent state, county and city industry information that is available is for the

⁴Industry data from *County Business Patterns* and *Zip Code Business Patterns* are measured annually, while data from the *US Economic Census* are measured every five years (the most recent being 2002).

year 2004 because of lag time involved in data collection.⁵ Based on price changes over time since 2004, economic impact projections are made for the year 2006. The economic projections are conservative in nature, since only price changes are considered. The effects of growth in real output and jobs since 2004 are excluded from the projections. More advanced time series analyses would be necessary to take into account these factors in the economic projections. Future research should focus on time trends, as well as major determinants that influence the scope and dynamics of the furniture cluster.

The methodology for calculating the economic impact of the furniture cluster is based upon the standard IMPLAN input-output modeling approach (www.implan.com). According to this method, total economic impact equals the sum of direct, indirect and induced effects (*Economic Impact = Direct Effects + Indirect Effects + Induced Effects*).⁶ Direct effects consist of output and jobs generated by industries directly relating to the furniture cluster, such as furniture manufacturing. Indirect effects refer to additional output and employment among other industries, such as suppliers, fabrics, mills, and trucking, that are triggered by direct expenditures in the furniture cluster. Induced effects refer to the impact of consumer expenditures among households employed in the direct and indirect industries of the furniture cluster.

Economic impact is primarily measured in two ways in this analysis: industry output and employment. Output refers to total industry expenditures (including business imports that are used as inputs to produce goods). Output equals intermediate goods plus final goods, and is approximately equal to industry sales revenue. The “value-added” economic measurement is also frequently quoted in this analysis, which equals resource payments to land, labor and capital. Value-added is comparable to the value of final goods or domestic product.⁷ Value-added is smaller than industry output, since intermediate goods are excluded. Additionally, employment is used as a measurement of economic impact in this analysis, and refers to jobs created corresponding to direct, indirect and induced industry expenditures.

This analysis estimates the economic impact of the furniture cluster upon the *Triad Region* as well as upon the overall North Carolina state economy. The economic impact of the core furniture-related industries, including furniture manufacturing, wholesale and retail, which is a key subset of the overall industry cluster, is similarly estimated.

⁵ Some of the results pertaining to industry employment in **Part One** of this report differs from the industry employment results of **Part Two** because of different data sources. The Industry employment information relating to **Part Two** of this report is obtained from the *ReferenceUSA*© database.

⁶ Economic impact is determined by multiplying the direct industry effects by “impact factors” to arrive at the indirect and induced effects.

⁷ At the state and national levels, domestic product is referred to as gross domestic product (GDP). The main advantage of the “value-added” measurement is that the problem of double counting is avoided.

Economic Characteristics of North Carolina, the *Triad Region*, and the *High Point Area*

Table 1 provides a comparison of projected economic output, value-added, employee compensation and employment for North Carolina and the *Triad Region* during 2006. Industry output for North Carolina is projected at \$614.64 billion with around 5 million jobs (\$316.63 billion value-added). Industry output for the *Triad Region* is nearly \$99 billion with over 690,000 jobs (\$49.09 billion value-added). The *Triad Region*'s contribution to total industry output in North Carolina is therefore around 16 percent.

TABLE 1. OUTPUT, VALUE-ADDED, EMPLOYEE COMPENSATION AND JOBS FOR NORTH CAROLINA AND THE TRIAD REGION FOR 2006

Region	Industry Output	Value-Added	Employee Compensation	Jobs
North Carolina	\$614,643,191,513	\$316,626,578,143	\$183,341,043,862	4,984,225
Triad Region	\$98,951,729,973	\$49,092,952,619	\$25,688,838,995	692,571
Triad/NC	16.10%	15.51%	14.01%	13.90%

Source: IMPLAN database, MIG Inc.; County Business Patterns, Zip Code Business Patterns

Table 2 provides a comparison of projected industry output, value-added, employee compensation and jobs for the *Triad Region* and the *High Point Area* during 2006. Industry output for the *High Point Area* is nearly \$11 billion with 75,750 jobs (\$4.72 billion value-added). The *High Point Area* thus contributes about 11 percent of the total industry output in the four-county Triad economy.

TABLE 2. OUTPUT, VALUE-ADDED, EMPLOYEE COMPENSATION AND JOBS FOR THE TRIAD REGION AND THE HIGH POINT AREA FOR 2006

Region	Industry Output	Value-Added	Employee Compensation	Jobs
Triad Region	\$98,951,729,973	\$49,092,952,619	\$25,688,838,995	692,571
High Point Area	\$10,989,035,970	\$4,715,960,456	\$2,891,359,220	75,750
High Point Area/Triad	11.11%	9.61%	11.26%	10.94%

Source: IMPLAN database, MIG Inc.; County Business Patterns, Zip Code Business Patterns

High Point is the third most populous city in the *Triad Region* next to Greensboro and Winston-Salem. The combined population for the three Triad cities is over half a million people. Based on 2006 projections, the population for High Point is nearly 100,000, Winston-Salem is almost 200,000 and Greensboro is around 230,000 (Figure 1, p. 26). All three cities rank in the top ten for most populous cities in the state (Figure 2, p. 27). All three cities have also experienced increasing population during the period 2000-2005. The population of the three combined Triad cities has risen by an average of about 4,500 persons per year, with the population of High Point rising by more than 1,600 persons per year on average (Figure 1, p. 26).

Correspondingly, Guilford and Forsyth counties are the third and fourth most populous counties in North Carolina (see Figure 3, p. 28).

Table 3 indicates the population trend for the overall *High Point Area*, consisting of High Point, Archdale, Thomasville and Trinity. The overall *High Point Area* has experienced rising population over time, increasing from 127,000 to over 137,000 during the five year span from 2000 to 2005, which is a rise of 8.1 percent.

TABLE 3. POPULATION IN THE HIGH POINT AREA FOR 2000-2005.

Geographic Area	Population estimates					
	July 1, 2000	July 1, 2001	July 1, 2002	July 1, 2003	July 1, 2004	July 1, 2005
Archdale city	9,277	9,225	9,242	9,285	9,323	9,428
High Point city	86,530	88,542	90,652	91,781	93,079	95,086
Thomasville city	24,516	24,978	25,287	25,522	25,698	25,872
Trinity city	6,725	6,717	6,750	6,799	6,830	6,915
Combined <i>High Point Area</i>	127,048	129,462	131,931	133,387	134,930	137,301
Source: Population Division, U.S. Census Bureau						
Release Date: June 21, 2006						

All four counties in the *Triad Region* rank in the top ten for manufacturing jobs in the state. Guilford County is ranked first, Forsyth County is fourth, Randolph County is seventh, and Davidson County is tenth (see Figure 4, p. 29). In 2004, about 44 percent of the industry output in the *Triad Region* came from manufacturing, at nearly \$42 billion and 97,584 jobs (Figures 5 and 6, pp. 30, 31). Also, in 2004, about \$193.76 billion in industry output and 588,795 jobs were generated from manufacturing throughout North Carolina. The *Triad Region* therefore contributes 21.55 percent of the state's manufacturing output and 16.57 percent of the state's manufacturing jobs (source: IMPLAN database).

Regarding furniture manufacturing jobs, Guilford, Davidson, and Randolph counties rank third, fourth and fifth in the state respectively (Figure 7, p. 32). Furniture manufacturing is the largest manufacturing subsector in the *Triad Region* with over 16,000 jobs, which is 17 percent of all manufacturing jobs for that region (see Figure 6, p. 31).

However, manufacturing jobs, including those relating to furniture, have generally declined in recent years. From 2003 to 2004, furniture manufacturing jobs fell from 17,120 to 16,127 across the *Triad Region*. Real industry output in furniture manufacturing, on the other hand, increased slightly from \$2.37 billion to \$2.39 billion during this period (after adjusting for inflation). Correspondingly, from 1994 to 2000, furniture manufacturing jobs in the *Triad Region* fell 11.44 percent, while real industry output in furniture manufacturing rose 9.36 percent (source: IMPLAN database). As furniture manufacturing jobs have declined, real output (sales revenue) in furniture manufacturing has risen. This is partly because of outsourcing, including furniture-related imports to businesses in the *Triad Region*. Despite declines in manufacturing jobs, including furniture-related industries, the *Triad Region* has experienced overall increasing employment. Total jobs across the *Triad Region* rose by an average of more than 5,000 per year over the period 1993-2004 (Based on *County Business Patterns* data; Figure 8, p. 33). Declines in manufacturing jobs have thus been offset by job increases in other industry sectors.

Furniture and Related Product Manufacturing in the *Triad Region* and the *High Point Area*

The first category of direct output and jobs in the furniture industry cluster consists of furniture and related product manufacturing, as defined by North American Industrial Classification System (NAICS) Codes. The description for this industry subsector is as follows:

Industries in the Furniture and Related Product Manufacturing subsector make furniture and related articles, such as mattresses, window blinds, cabinets, and fixtures. The processes used in the manufacture of furniture include the cutting, bending, molding, laminating, and assembly of such materials as wood, metal, glass, plastics, and rattan. However, the production process for furniture is not solely bending metal, cutting and shaping wood, or extruding and molding plastics. Design and fashion trends play an important part in the production of furniture. The integrated design of the article for both esthetic and functional qualities is also a major part of the process of manufacturing furniture. Design services may be performed by the furniture establishment's work force or may be purchased from industrial designers.

(2002 North American Industrial Classification Systems Manual,
Office of Management and Budget)

This subsector consists of 12 furniture-related manufacturing industries (NAICS codes in parentheses).

Wood kitchen cabinet and countertop manufacturing (33711)
Upholstered household furniture manufacturing (337121)
Nonupholstered wood household furniture manufacturing (337122)
Metal household furniture manufacturing (337124)
Institutional furniture manufacturing (337127)
Other household and institutional furniture (337125, 337129)
Wood office furniture manufacturing (337211)
Custom architectural woodwork and millwork (337212)
Office furniture- except wood- manufacturing (337214)
Showcases – partitions – shelving - and lockers (337215)
Mattress manufacturing (33791)
Blind and shade manufacturing (33792)

The projected direct output and jobs associated with these 12 industries across the *Triad Region* and in the *High Point Area* for 2006 are presented in Table 4.

TABLE 4. PROJECTED FURNITURE AND RELATED PRODUCT MANUFACTURING FOR 2006 IN THE TRIAD AND HIGH POINT AREAS

Industry	<i>Triad Region:</i> (Davidson, Forsyth, Guilford & Randolph Counties)		<i>High Point Area:</i> (High Point, Archdale, Thomasville, Trinity)	
	<u>Direct Output</u>	<u>Direct Jobs</u>	<u>Direct Output</u>	<u>Direct Jobs</u>
Wood kitchen cabinet and countertop manufacturing	\$121,869,840	931	\$108,125,112	826
Upholstered household furniture manufacturing	\$855,494,848	6,720	\$378,098,176	2,970
Nonupholstered wood household furniture manufacturing	\$412,173,440	3,056	\$19,691,532	146
Metal household furniture manufacturing	\$101,238,976	615	\$30,783,234	187
Institutional furniture manufacturing	\$32,138,518	247	\$23,811,130	183
Other household and institutional furniture	\$44,663,884	236	\$5,677,612	30
Wood office furniture manufacturing	\$392,465,408	1,942	\$304,554,784	1,507
Custom architectural woodwork and millwork	\$3,504,541	26	\$2,291,430	17
Office furniture- except wood- manufacturing	\$25,319,484	117	\$14,715,597	68
Showcases- partitions- shelving- and lockers	\$186,523,056	1,540	\$131,050,624	1,082
Mattress manufacturing	\$521,473,472	1,771	\$234,677,808	797
Blind and shade manufacturing	\$21,811,406	122	\$7,330,063	41
SUBTOTAL	\$2,718,676,873	17,323	\$1,260,807,102	7,854

Source: IMPLAN database, MIG Inc; County Business Patterns, Zip Code Business Patterns

Throughout the *Triad Region*, furniture and related product manufacturing output is projected to be \$2.72 billion with over 17,300 jobs for 2006. Most of the jobs and industry output come from upholstered and nonupholstered furniture, mattresses, and wood office furniture. In the *High Point Area*, industry output from the furniture manufacturing subsector is projected to be \$1.26 billion with around 7,850 jobs. The *High Point Area* therefore contributes about 46 percent of the total amount of furniture manufacturing output produced in the *Triad Region* ($\$1,260,807,102 \div \$2,718,676,873 = .4638$).

Across the state of North Carolina, furniture and related product manufacturing for 2006 is projected to be \$8.44 billion with 59,894 jobs (source: IMPLAN database). The *Triad Region* thus contributes about one third of the total furniture manufacturing output produced in the state economy ($2.72 \div 8.44 = .322$).

Major Furniture-Supporting Industries

The second category of direct output and jobs in the furniture cluster consists of industries that significantly support and relate to furniture manufacturing, such as curtains/linen, leather, wood-related industries, foam, spring/wire, lighting fixtures, and capital expenditures among furniture manufacturing industries. For example, wood, foam and spring/wire products serve as major inputs to furniture manufacturers, while capital investments in furniture manufacturing industries replace worn out equipment and facilities and build productive capacity. This grouping consists of nine industries (NAICS codes in parentheses).

- Capital construction, maintenance, repair (23)
- Curtain and linen mills (31412)
- Leather product manufacturing (31699)
- Sawmills (321113)
- Veneer and plywood manufacturing (321211, 321212)
- Cut stock - resawing lumber - and planing (321912)
- Foam product manufacturing (32614, 32615)
- Spring and wire product manufacturing (3326)
- Lighting fixture manufacturing (33512)

The 2006 projected output and jobs for major furniture-supporting industries across the *Triad Region* and in the *High Point Area* are supplied in Table 5.

TABLE 5. FURNITURE-SUPPORTING INDUSTRIES

Industry	<i>Triad Region:</i> (Davidson, Forsyth, Guilford & Randolph Counties)		<i>High Point Area:</i> (High Point, Archdale, Thomasville, Trinity)	
	Direct Output	Direct Jobs	Direct Output	Direct Jobs
Curtain and linen mills	\$109,674,312	657	\$82,965,192	497
Leather product manufacturing	\$7,784,776	61	\$638,096	5
Sawmills	\$64,157,008	249	\$8,502,736	33
Veneer and plywood manufacturing	\$248,084,320	1,372	\$69,796,320	386
Cut stock - resawing lumber - and planing	\$39,306,596	270	\$8,734,799	60
Foam product manufacturing	\$182,128,816	817	\$142,894,208	641
Spring and wire product manufacturing	\$96,984,456	572	\$72,399,240	427
Lighting fixture manufacturing	\$56,408,824	248	\$16,604,211	73
Capital Expenditures in Furniture Manufacturing Industries (Construction, Maintenance, Repair)*	\$43,102,592	625	\$19,992,168	290
SUBTOTAL	\$847,631,700	4,871	\$422,526,970	2,412

Source: IMPLAN database, MIG Inc.; County Business Patterns, Zip Code Business Patterns

*Extrapolated from data in the 2002 US Economic Census

Across the *Triad Region*, major furniture-supporting industries create almost 4,900 jobs and close to \$850 million in industry output. The two largest furniture-supporting industries are veneer/plywood and foam. These two industries produce about \$430 million in industry output and about 2,200 jobs across the *Triad Region*. In the *High Point Area*, over \$420 million in industry output and over 2,400 jobs are generated among major furniture-supporting industries. The four largest industries in this category in the *High Point Area* consist of foam, curtain/linen mills, spring/wire manufacturing, and veneer/plywood manufacturing.

In addition to the industries indicated in Table 5, other important related and supporting industries pertaining to furniture manufacturing are examined later in this analysis as indirect effects, such as trucking, fabrics, wood, mills, packaging (boxes, containers), trade publications, business and professional associations, commercial printing, warehousing, hardware, etc.

Furniture Marketing, Design, Photography and Cleaning/Repair

The third category of direct output and jobs in the furniture industry cluster includes six industries pertaining to furniture wholesale, retail, interior and industrial design, commercial photography, and furniture cleaning/repair (the NAICS codes are in parentheses).

- Furniture Merchant Wholesalers (423210)
- Furniture and home furnishings stores (442)
- Interior Design and Industrial Design (54141, 54142)
- Commercial Photography (541922)
- Carpet and Upholstery Cleaning Services (561740)
- Reupholstery and Furniture Repair (811420)

Table 6 indicates the 2006 projected output and employment associated with these industries across the four-county *Triad Region* and in the *High Point Area*.

TABLE 6. FURNITURE MARKETING, DESIGN, COMMERCIAL PHOTOGRAPHY, CLEANING & REPAIR

Industry	<i>Triad Region:</i> (Davidson, Forsyth, Guilford & Randolph Counties)		<i>High Point Area:</i> (High Point, Archdale, Thomasville, Trinity)	
	Direct Output	Direct Jobs	Direct Output	Direct Jobs
Furniture merchant wholesalers	\$293,181,056	1,999	\$176,729,968	1,205
Furniture and home furnishings stores (retail)	\$324,918,944	4,071	\$83,404,648	1,045
Industrial design, interior design	\$48,785,748	412	\$16,696,092	141
Commercial photography (estimated 16.95% furniture related based on survey responses)	\$7,380,430	70	\$2,319,564	22
Carpet and Upholstery Cleaning Services	\$6,825,000	145	\$706,034	15
Reupholstery and furniture repair	23,319,564	167	\$15,360,192	110
SUBTOTAL	\$704,410,742	6,864	\$295,216,498	2,538

Source: IMPLAN database, MIG Inc.; County Business Patterns, Zip Code Business Patterns

Furniture wholesale and retail are by far the two largest industries in this category, with more than \$600 million in industry output and over 6,000 jobs throughout the *Triad Region*. In the *High Point Area*, more than \$250 million in industry output and over 2,200 jobs come from furniture wholesale and retail. Across the *Triad Region*, the combined furniture wholesale/retail industries are the second largest source of jobs in the overall furniture cluster (1,999 + 4,071 = 6,070 jobs), next to upholstered household furniture manufacturing (6,720 jobs; see Table 4).

Additionally, the combined industry output from industrial design (including furniture design) and interior design is close to \$50 million across the *Triad Region*, with about \$16.7 million in industry output from the *High Point Area*.⁸ Finally, industry output associated with furniture-related commercial photography is projected to be \$7.4 million across the *Triad Region*, with \$2.3 million from the *High Point Area*. Based on survey responses, 16.95 percent of the sales revenue from the commercial photography industry is estimated to be furniture related.⁹

International Home Furnishings Market

The fourth category of expenditures and jobs in the furniture cluster is the International Home Furnishing Market (IHFM). A 2003 economic analysis by Dr. Andrew Brod estimated the impact of this effect (*The Economic Impact of the Home Furnishings Market, OBER Report*, Office of Business and Economics Research at the University of North Carolina at Greensboro). Based on this analysis, four categories of direct expenditures were identified: (a) market attendees, (b) exhibitors between markets, (c) exhibitors during markets, and (d) showrooms.

This report estimated that direct expenditures relating to the IHFM in 2003 were \$668,430,469 for the Greensboro/Winston-Salem/High Point Metropolitan Statistical Area, with an economic impact of \$1,053,005,211 in output and 12,774 jobs. Across the state, direct expenditures were estimated to be \$662,513,488, with an economic impact of \$1,144,889,218 in output and 13,516 jobs.

A reworking of the economic impact of the IHFM is beyond the scope of this present report. However, according to the High Point Market Authority, the IHFM has demonstrated stable or growing attendance by market visitors over the past several years, rising from around 75,000 visitors per market to as many as 85,000 visitors (Dr. Brod's previous report estimated market visitors of around 75,000 persons per market).¹⁰

To arrive at a conservative 2006 estimate for IHFM direct expenditures and the corresponding economic impact, the effects are assumed analogous to the previous OBER Report, except for adjustments in expected price changes over time. Table 7 displays the 2006 estimated economic impact for the IHFM.

⁸ While not entirely furniture related, much of the output from interior design and industrial design overlaps considerably with the furniture cluster.

⁹ The sample size consists of 19 companies; many of the commercial photography firms did not respond to the survey question regarding the fraction of their business that is furniture-related. Also, responses ranged from zero percent to 100 percent, yielding a large standard deviation of 32.1 percent.

¹⁰ Assuming IHFM attendance of 85,000 visitors per market, instead of 75,000, would create a greater economic impact than the estimates given.

TABLE 7. ECONOMIC IMPACT OF THE INTERNATIONAL HOME FURNISHINGS MARKET UPON THE WIDER TRIAD REGION AND NORTH CAROLINA

	Direct Effects	Indirect and Induced Effects	Total Economic Impact
IHFM-related Expenditures and the Output Impact upon the <i>Wider Triad Region</i>	\$709,343,761	\$408,113,792	\$1,117,457,554
Jobs Impact upon the <i>Wider Triad Region</i>	N/A	12,774	12,774
IHFM-related Expenditures and the Output Impact upon North Carolina	\$703,064,614	\$511,900,984	\$1,214,965,597
Jobs Impact upon North Carolina	N/A	13,516	13,516

Sources: Economic Impact of the International Home Furnishings Market, OBER Report (Dr. Brod, March 2004). These results assume an annual two percent change in IHFM-related prices from 2003 to 2006.

Based on a conservative two percent annual inflation for IHFM-related expenditures, the 2006 estimate is almost \$710 million in direct output, with an estimated economic impact of \$1.1 billion and 12,774 jobs across the broader eight-county *Triad Region*.¹¹ Throughout the state, the estimated economic impact is over \$1.2 billion in industry output with about 13,500 jobs.¹²

¹¹ The 2004 OBER report defines the (wider) *Triad Region* as consisting of eight counties, whereas the present analysis defines the Triad area more narrowly as consisting of four counties. Consequently, the 2006 estimate for the IHFM economic impact extends beyond the four-county *Triad Region* into the surrounding counties.

¹² The economic impact of the IHFM upon jobs is assumed to be the same as the 2004 OBER report.

Overall Direct Output and Jobs in the Furniture Cluster

Table 8 summarizes the direct industry output and jobs associated with the four expenditure categories of the furniture cluster as explained in previous sections (see Tables 4-7). The total direct impact across the four categories adds up to almost \$5 billion in industry output with over 29,000 jobs across the *Triad Region* (\$1.62 billion value-added, excluding IHFM effects). For the *High Point Area*, the direct impact is \$2.4 billion in industry output with almost 13,000 jobs (\$753.49 million value-added, excluding IHFM effects).

TABLE 8. TOTAL DIRECT EXPENDITURES AND EMPLOYMENT

Industry Categories	<i>Triad Region:</i> (Davidson, Forsyth, Guilford & Randolph Counties)		<i>High Point Area:</i> (High Point, Archdale, Thomasville, Trinity)	
	Direct Output	Direct Jobs	Direct Output	Direct Jobs
A. Furniture and related product manufacturing	\$2,718,676,873	17,323	\$1,260,807,102	7,854
B. Furniture-supporting industries	\$847,631,700	4,871	\$422,526,970	2,412
C. Marketing, design, photography, cleaning/repair	\$704,410,742	6,864	\$295,216,498	2,538
D. International Home Furnishings Market	\$709,343,761	N/A	\$425,606,257*	N/A
TOTAL DIRECT OUTPUT AND JOBS IN THE FURNITURE INDUSTRY CLUSTER	\$4,980,063,076	29,058	\$2,404,156,827	12,804
TOTAL OUTPUT AND JOBS IN THE TRIAD REGION AND HIGH POINT AREA	\$98,951,729,973	692,571	\$10,989,035,970	75,750
DIRECT EFFECTS/AREA ECONOMY	5.03%	4.20%	21.88%	16.90%

Sources: IMPLAN database, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census, *Economic Impact of the International Home Furnishings Market*, OBER Report (Dr. Brod, March 2004)

*Assumes 60 percent of IHFM direct expenditures occur in the *High Point Area*.

Furniture manufacturing (category A) generates over half of the direct industry output in the furniture cluster. Additionally, the furniture cluster directly generates about five percent of the total industry output and over four percent of the total jobs in the *Triad Region*. The furniture cluster's contribution to total industry output in the *High Point Area*, however, is much greater at around 20 percent or more. This result assumes that at least 60 percent of IHFM direct expenditures occur in the *High Point Area*.

Indirect Industry Output and Jobs

As a result of direct expenditures and employment in the furniture cluster, additional output and jobs are created indirectly among other industries that are interconnected with the furniture cluster.¹³ For instance, furniture manufacturing triggers additional production, employment and sales among suppliers, fabric mills, wood-related industries, trucking, and various other business activities. The IMPLAN input-output model estimates indirect effects based on national and regional averages. Estimates for many of the largest categories of indirect industry output and jobs generated by the furniture cluster across the *Triad Region* and in the *High Point Area* are indicated in Table 9.¹⁴

Throughout the *Triad Region*, about \$1.77 billion in industry output and 12,600 jobs are generated indirectly by the furniture cluster (\$820.55 million value-added, excluding IHFM effects). For the *High Point Area*, almost \$800 million and about 5,500 jobs are created by indirect effects (\$369.57 million value-added, excluding IHFM effects). Some of the largest indirect output and jobs come from industries already identified directly in the furniture cluster, such as wholesale and various furniture-related manufacturing.

Truck transportation, however, is one key industry that is not included in the direct furniture cluster, but is a significant indirect industry.

Trucking of furniture generates over \$93 million in indirect output and about 720 jobs throughout the Triad Region as a result of the furniture cluster, with almost \$42 million in output and about 320 jobs from the High Point Area.

Other important indirect impacts include management, professional and technical services, various banking-related industries, telecommunications, various packaging-related industries, various fabrics and millwork, warehousing, air and rail transportation, publications, commercial printing, business and professional associations, and hardware manufacturing. The indirect output and jobs associated with each of these industry activities across the *Triad Region* and in the *High Point Area* are also displayed in Table 9.¹⁵

¹³ Indirect output and jobs generated by the IHFM are not included in Tables 9 and 9A. The combined indirect and induced effects relating to the IHFM are included in Table 7.

¹⁴ Some of the indirect jobs and output generated by the furniture cluster extends into neighboring counties outside the four-county *Triad Region*.

¹⁵ Real estate (which is not listed in Table 9) is another important indirect impact of the furniture cluster. The estimated indirect impact of real estate is about \$62 million and 452 jobs across the *Triad Region*. Of that total amount, \$27.4 million and 200 jobs in real estate are generated indirectly as a result of the furniture cluster in the *High Point Area*. The indirect impact of real estate refers to the buying and selling of properties and buildings among the various direct and indirect industries associated with the furniture cluster.

**TABLE 9. INDIRECT OUTPUT AND JOBS
IN THE TRIAD REGION AND HIGH POINT AREA**

INDUSTRIES	TRIAD REGION		HIGH POINT AREA	
	Indirect Output	Indirect Jobs	Indirect Output	Indirect Jobs
TOTAL INDIRECT OUTPUT AND JOBS	\$1,774,901,967	12,609	\$793,809,482	5,523
Wholesale trade	\$223,184,416	1,522	\$106,240,880	724
Nonupholstered wood household furniture manufacturing	\$185,077,824	1,372	\$39,710,128	294
Wood office furniture manufacturing	\$122,906,256	608	\$94,617,984	468
Foam product manufacturing	\$102,855,696	461	\$46,587,108	209
Truck transportation	\$93,371,896	723	\$41,831,448	324
Mattress manufacturing	\$77,117,672	262	\$35,194,000	120
Showcases – partitions – shelving - and lockers	\$54,833,852	453	\$23,275,692	192
Management of companies and enterprises	\$50,779,436	254	\$22,350,730	112
Veneer and plywood manufacturing	\$49,935,712	276	\$19,996,676	111
Sawmills	\$36,212,096	141	\$12,792,728	50
Cut stock - resawing lumber - and planing	\$26,613,842	183	\$10,842,939	75
All other miscellaneous professional and technical services	\$26,482,446	62	\$12,507,576	29
Monetary authorities and depository credit intermediaries	\$25,548,346	93	\$11,748,991	43
Nondepository credit intermediation (e.g., credit card issuing)	\$25,143,702	176	\$11,689,199	82
Telecommunications	\$24,368,052	77	\$11,235,240	36
Plastics plumbing fixtures and all other plastics	\$23,359,868	124	\$11,193,306	59
Food services and drinking places	\$20,206,798	430	\$9,321,693	199
Various packaging-related industries	\$19,275,753	78	\$9,601,777	39
Textile and fabric finishing mills	\$19,064,226	95	\$9,303,463	46
Various other fabric mills and millwork	\$19,237,284	92	\$9,578,198	45
Advertising and related services	\$15,191,947	137	\$6,549,255	59
Warehousing and storage	\$11,044,655	167	\$4,789,357	73
Air and rail transportation	\$9,702,579	40	\$4,388,155	18
Publishers (periodicals, trade publications, etc.)	\$8,375,667	69	\$3,612,951	30
Commercial printing	\$5,904,961	66	\$2,581,055	29
Business and professional organizations	\$2,718,207	95	\$1,264,106	44
Hardware manufacturing	\$1,720,322	9	\$775,590	4
ALL OTHER INDUSTRIES	\$494,668,456	4,544	\$220,229,257	2,009

Sources: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census

Induced Industry Output and Jobs

Besides direct and indirect output and jobs generated by the furniture cluster, consumer spending also rises as a result of household income to workers employed in the various direct and indirect industries.¹⁶ The IMPLAN model estimates induced effects based on national and regional averages. Table 10 displays the largest categories of induced spending and jobs created across the *Triad Region* and in the *High Point Area*. Throughout the *Triad Region*, total induced industry output is about \$1.1 billion with about 11,000 jobs (\$640.26 million value-added, excluding IHFM effects). Some of the induced output and jobs extends into surrounding counties outside the four-county *Triad Region*. For the *High Point Area*, induced output is close to half a billion dollars with almost 5,000 jobs (\$289.48 million value-added, excluding IHFM effects).

The largest grouping of induced effects consists of health care-related industries, including doctors/dentists and hospitals (ranked 1 and 3 in the table), as well as nursing/residential care, ambulatory services and pharmaceuticals/medicine. The combined induced output associated with health-care related industries is about \$179 million across the *Triad Region*. Other important induced impacts indicated in Table 10 include food services and drinking places, real estate, wholesale, banking and insurance, auto-related industries, telecommunications, merchandise and clothing stores, and universities and colleges.

¹⁶ Induced output and jobs generated by the IHFM are not included in Table 10. The combined indirect and induced effects for the IHFM are included in Table 7.

TABLE 10. INDUCED OUTPUT AND JOBS IN THE TRIAD REGION AND HIGH POINT AREA

INDUSTRIES	TRIAD REGION		HIGH POINT AREA	
	Induced Output	induced Jobs	Induced Output	induced Jobs
TOTAL INDUCED OUTPUT AND JOBS	\$1,087,531,657	10,921	\$491,714,381	4,938
Offices of physicians- dentists- and other health	\$67,491,488	533	\$30,515,460	241
Food services and drinking places	\$66,557,340	1,418	\$30,093,080	641
Hospitals	\$61,022,112	572	\$27,590,450	259
Real estate	\$57,740,456	421	\$26,106,686	190
Wholesale trade	\$55,730,076	380	\$25,197,688	172
Monetary authorities and depository credit intermediaries	\$28,204,232	103	\$12,752,200	46
Insurance carriers	\$27,580,246	116	\$12,470,069	53
Motor vehicle and parts dealers	\$27,500,326	241	\$12,433,939	109
Automotive repair and maintenance- except car wash	\$20,198,312	268	\$9,132,422	121
Telecommunications	\$19,962,768	63	\$9,025,929	29
Food and beverage stores	\$19,312,556	341	\$8,731,939	154
Pharmaceutical and medicine manufacturing	\$19,153,534	22	\$8,660,062	10
General merchandise stores	\$18,887,888	346	\$8,539,930	157
Nursing and residential care facilities	\$16,847,476	381	\$7,617,398	172
Other ambulatory health care services	\$14,285,012	108	\$6,458,801	49
Truck transportation	\$14,210,992	110	\$6,425,330	50
Building material and garden supply stores	\$13,648,216	148	\$6,170,875	67
Colleges- universities- and junior colleges	\$12,798,738	176	\$5,786,800	80
Clothing and clothing accessories stores	\$12,511,652	230	\$5,656,992	104
Nondepository credit intermediation	\$11,154,360	78	\$5,043,310	35
ALL OTHER INDUSTRIES	\$502,733,877	4,865	\$227,305,021	2,200

Source: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census

Overall Economic Impact of the Furniture Industry Cluster upon the Four-County *Triad Region*

Table 11 contains estimates regarding the overall economic impact of the furniture cluster across the *Triad Region* and the *High Point Area* based on the results given in the preceding sections. Throughout the *Triad Region*, direct industry output from the furniture cluster is projected to be about \$5 billion with about 29,000 jobs (see Table 8). Taking into account indirect and induced effects (from Tables 9 and 10), the overall economic impact upon the *Triad Region* and extending into surrounding counties is \$8.25 billion in industry output with over 65,000 jobs (\$3.09 billion value-added, excluding IHFM effects).

For the *High Point Area*, direct furniture-related output is projected at \$2.4 billion with about 12,800 jobs (see Table 8). Taking into consideration the indirect effects and induced effects (from Tables 9 and 10), the total economic impact generated by the furniture cluster in the *High Point Area* upon the *Triad Region* is \$3.93 billion in industry output with almost 31,000 jobs (\$1.41 billion value-added, excluding IHFM effects). The *High Point Area* therefore contributes almost half of the total economic impact of the furniture cluster upon the *Triad Region* ($\$3,934,548,965 \div \$8,250,610,564 = .477$).

TABLE 11. IMPACT OF THE FURNITURE CLUSTER IN THE *FOUR-COUNTY TRIAD REGION* AND THE *HIGH POINT AREA* (INCLUDING IHFM EFFECTS)

	Direct Effects	Indirect plus Induced Effects	Total Economic Impact upon the <i>Triad Region</i> and Surrounding Counties
<i>Triad Region</i> Furniture-related Output	\$4,980,063,076	\$3,270,547,416	\$8,250,610,564
<i>Triad Region</i> Furniture-related Jobs	29,058	36,304	65,362
<i>High Point Area</i> Furniture-related Output	\$2,404,156,827	\$1,530,392,138	\$3,934,548,965
<i>High Point Area</i> Furniture-related Jobs	12,804	18,125	30,929

Sources: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census, *Economic Impact of the International Home Furnishings Market*, OBER Report (Dr. Brod, March 2004)

Economic Impact of the Furniture Cluster for Each County in the *Triad Region*

Table 12 displays a breakdown of the economic impact of the furniture cluster for each county in the *Triad Region*. Excluding the International Home Furnishings Market, the direct effects of the furniture cluster in *Triad Region* are more than 29,000 jobs with \$4.27 billion in output (This compares with Table 8 which shows the direct effects of the furniture cluster including the IHFM). Taking into account indirect and induced effects, the total economic impact of the furniture cluster (excluding IHFM) is 52,588 jobs and \$7.13 billion (This compares with Table 11 which shows the economic impact of the furniture cluster including the IHFM).

Of the four counties in the *Triad Region*, Guilford County creates the greatest impact relating to the furniture cluster with 23,863 jobs and \$3.23 billion in industry output, which is 45 percent of the total effect in the *Triad Region*. Additionally, Randolph County generates about 26 percent of the jobs impact relating to the furniture cluster across the *Triad Region* (13,740 jobs), Davidson County generates 22 percent of the jobs impact (11,508 jobs), and Forsyth County generates 7 percent of the jobs impact (3,477 jobs).

TABLE 12. ECONOMIC IMPACT OF THE FURNITURE CLUSTER FOR EACH OF THE FOUR COUNTIES IN THE TRIAD REGION (EXCLUDING IHFM EFFECTS)

	Direct Effects	Indirect plus Induced Effects	Impact on the <i>Triad Region</i> and Surrounding Counties
Overall <i>Triad Region</i> Furniture-related Jobs (excluding IHFM)	29,058	23,530	52,588
<i>Davidson County</i> Furniture-related Jobs	6,193	5,315	11,508 (22%)
<i>Forsyth County</i> Furniture-related Jobs	2,191	1,286	3,477 (7%)
<i>Guilford County</i> Furniture-related Jobs	13,310	10,553	23,863 (45%)
<i>Randolph County</i> Furniture-related Jobs	7,364	6,376	13,740 (26%)
Overall <i>Triad Region</i> Furniture-related Output (excluding IHFM)	\$4,270,719,315	\$2,862,433,624	\$7,133,152,939
<i>Davidson County</i> Furniture-related Output	\$918,726,863	\$646,663,211	\$1,565,390,074 (22%)
<i>Forsyth County</i> Furniture-related Output	\$232,760,649	\$135,522,636	\$368,283,285 (5%)
<i>Guilford County</i> Furniture-related Output	\$1,954,642,368	\$1,276,759,859	\$3,231,402,227 (45%)
<i>Randolph County</i> Furniture-related Output	\$1,164,589,436	\$803,487,917	\$1,968,077,353 (28%)

Sources: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census.

Economic Impact of the Core Furniture-Related Industries Upon the *Triad Region*

The core industries of the furniture cluster consists of furniture and related product manufacturing (category A) plus furniture wholesale and retail (from category C). The economic impact of the core furniture-related industries upon the *Triad Region* is presented in Table 13.

TABLE 13. ECONOMIC IMPACT OF THE CORE FURNITURE-RELATED INDUSTRIES UPON THE *TRIAD REGION*

	Direct Effects	Indirect plus Induced Effects	Total Economic Impact upon the <i>Triad Region</i>
Furniture and related product manufacturing output (category A, Table 4)	\$2,718,676,873	\$2,082,021,772	\$4,800,698,645
Furniture and related product manufacturing jobs (category A, Table 4)	17,323	16,474	33,797
Furniture wholesale and retail output (from category C in Table 6)	\$618,100,000	\$332,950,869	\$951,050,869
Furniture wholesale and retail jobs (from category C in Table 6)	6,070	3,278	9,348
COMBINED OUTPUT	\$3,336,776,873	\$2,414,972,641	\$5,751,749,514
COMBINED JOBS	23,393	19,752	43,145

Sources: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns,

The impact of the furniture and related product manufacturing subsector is about \$4.8 billion in industry output with almost 34,000 jobs across the *Triad Region*. The economic impact of furniture wholesale and retail is almost a billion dollars in industry output with about 9,350 jobs. The combined economic impact of furniture manufacturing, wholesale and retail is therefore \$5.75 billion in industry output with more than 43,000 jobs throughout the *Triad Region* (\$2.53 billion value-added).

Impact of the Furniture Cluster in the *Triad Region* Upon North Carolina

The economic impact of the furniture cluster in the *Triad Region* upon the North Carolina state economy is presented in Table 14. The estimated impact upon the state is \$8.94 billion in industry output with 69,392 jobs (\$3.39 billion value-added, excluding IHFM effects). The impact upon the state economy is greater than the impact upon the *Triad Region* (Table 11) since the multiplier effects of indirect and induced output and jobs extends over a broader geographic and economic area.

TABLE 14. ECONOMIC IMPACT OF THE FURNITURE INDUSTRY CLUSTER IN THE *TRIAD REGION* UPON THE NORTH CAROLINA ECONOMY

	Direct Effects	Indirect plus Induced Effects	Economic Impact upon North Carolina
<i>Triad Region</i> Furniture-related Output	\$4,973,783,929	\$3,962,205,245	\$8,935,989,173
<i>Triad Region</i> Furniture-related Jobs	29,058	40,334	69,392

Sources: IMPLAN database and software, MIG Inc.; County Business Patterns, Zip Code Business Patterns, US Economic Census, *Economic Impact of the International Home Furnishings Market*, OBER Report (Dr. Brod, March 2004)

While not included in the Table 14, the impact of the core furniture-related industries, consisting of furniture manufacturing plus furniture wholesale and retail is estimated to be \$6,170,080,554 in output and 45,265 jobs (\$2.74 billion value-added). These results correspond to the economic impact of the core furniture-related industries upon the *Triad Region* as indicated in Table 12.

Summary

This analysis estimates the 2006 economic impact of the furniture cluster in the *High Point and Triad Areas* of North Carolina. As much as 20 percent or more of the total industry output produced in the *High Point Area* comes from the furniture cluster (see Table 8). The impact of the furniture cluster in the *High Point Area* upon the *Triad Region* is estimated to be \$3.93 billion in industry output with almost 31,000 jobs (Table 11). The impact of the furniture cluster throughout the whole *Triad Region* is estimated to be about \$8.25 billion in industry output with 65,362 jobs. The impact of the furniture cluster in the *Triad Region* upon the North Carolina state economy is \$8.94 billion in output with more than 69,000 jobs (see Table 13).

The core industries of the furniture cluster, consisting of furniture manufacturing, wholesale and retail, create an impact upon the *Triad Region* of \$5.75 billion in industry output with over 43,000 jobs (see Table 12). Additional direct industries in the furniture cluster include various mills, wood-related industries, capital investment for furniture manufacturing,

commercial photography, industrial design, interior design, and the International Home Furnishings Market. Attendance by visitors at the biannual International Home Furnishings Market in High Point may be as high as 85,000 persons per market, or 170,000 market visitors per year.

An important category of indirect output and jobs is the trucking industry, which generates \$93.4 million in output and over 700 jobs throughout the *Triad Region* as a result of the furniture cluster (see Table 9). Additionally, health care-related expenditures are the largest grouping of induced effects, with \$179 million in industry output throughout the *Triad Region* as a result of the furniture cluster (Table 10).

The substantial economic impact of the furniture cluster is in context with the total size of the North Carolina state economy, which is projected to be \$614.64 billion in industry output for 2006, with the four-county Triad economy at almost \$99 billion, and the *High Point Area* at around \$11 billion (see Tables 1 and 2). The four-county *Triad Region* is an important engine for manufacturing output in the state, with furniture manufacturing being the largest subsector. Although furniture manufacturing employment has decreased in recent years, real industry output in furniture manufacturing appears to have risen, partly because of outsourcing and foreign imports to furniture companies in the *Triad Region*. Finally, overall employment in the *Triad Region* has risen at a rate of about 5,000 jobs per year, with population growing at an analogous rate.

Recommendations for Future Research

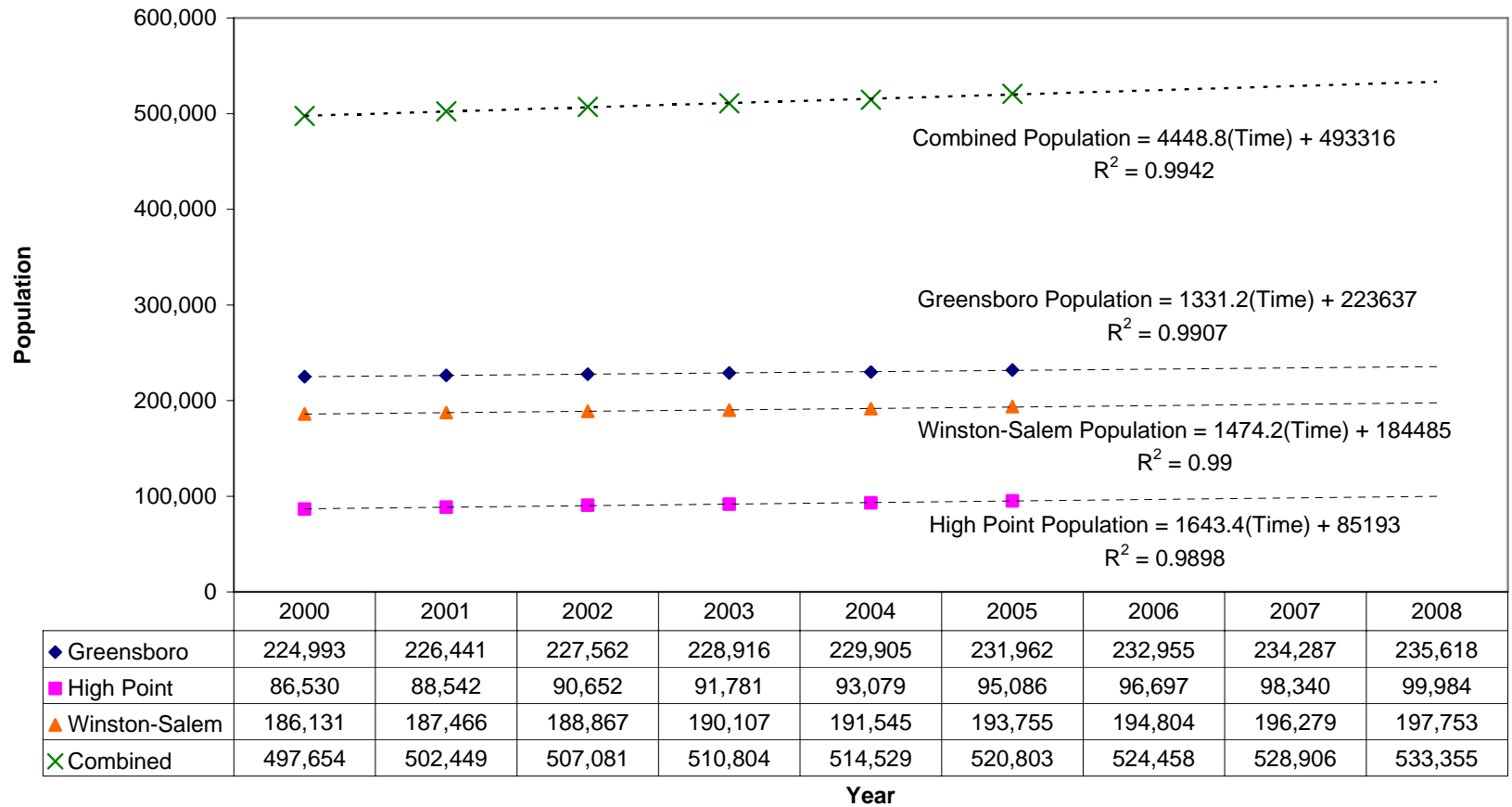
This economic impact analysis is the first study of its kind to quantify the size and impact of furniture-related industries throughout the *Triad Region* of North Carolina. The analysis provides a benchmark for additional research into the subject. Future analysis should examine time trends and key determinants that influence the scope and dynamics of the furniture cluster. Additional topics of research may also include the economic impact of textiles, apparel, overall manufacturing, other industry sectors, or specific business ventures and projects. Finally, an analysis of the changing distribution of jobs and industry output throughout the High Point and Triad Areas would be important to examine.

References and Data Sources

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- Zip Code Business Patterns (www.census.gov/epcd/www/zbp_base.html)

Figure 1. Triad Cities Population (2000-2005; Projected for 2006-2008)

Source: Population Division, U.S. Census Bureau



◆ Greensboro	■ High Point	▲ Winston-Salem	× Combined
----- Linear (Greensboro)	----- Linear (Winston-Salem)	----- Linear (High Point)	----- Linear (Combined)

Figure 2. Ten Most Populous NC Cities (2005)
Source: Population Division, U.S. Census Bureau

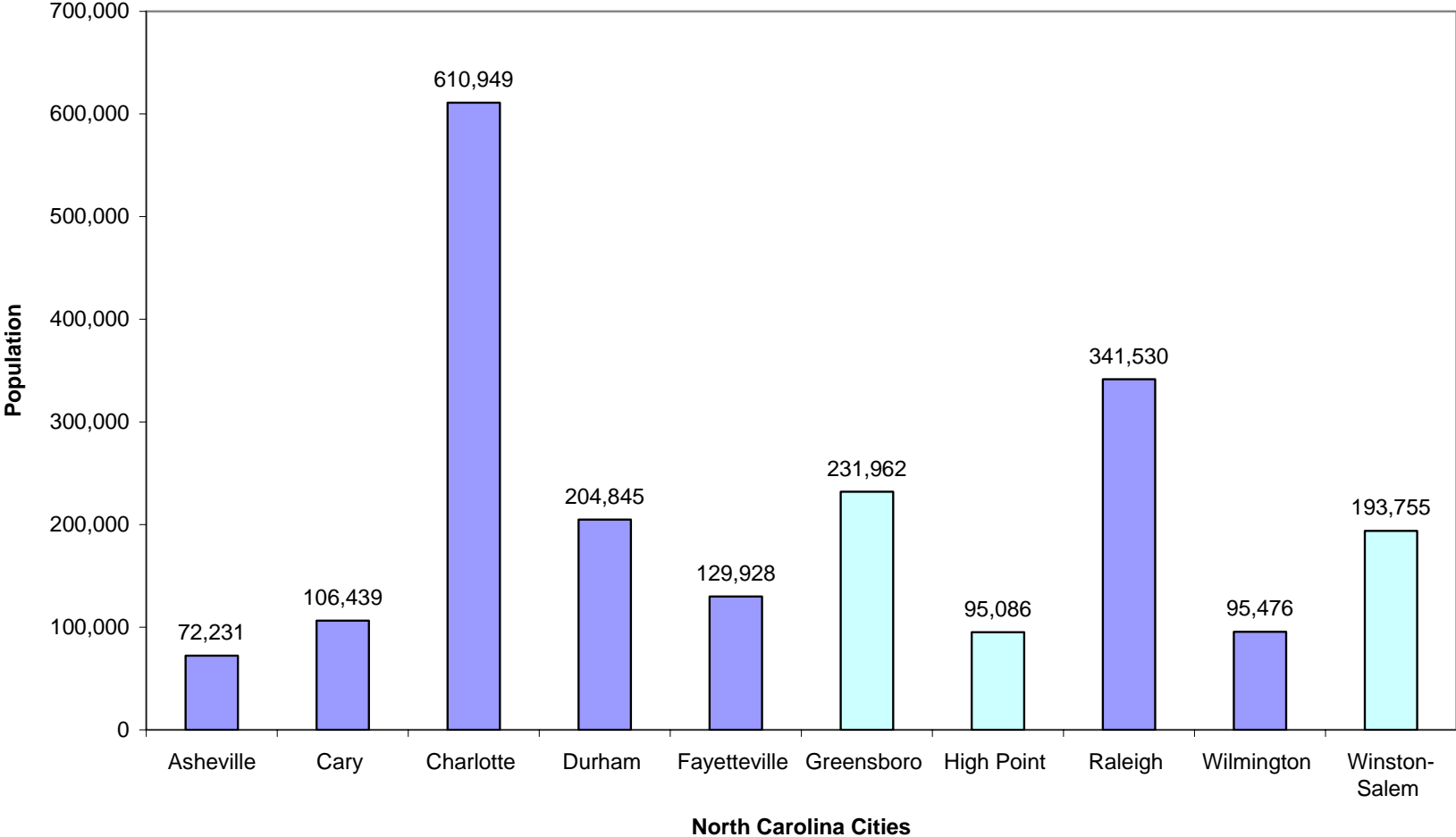


Figure 3. Five Most Populous NC Counties (2005)

Source: U.S. Census Bureau

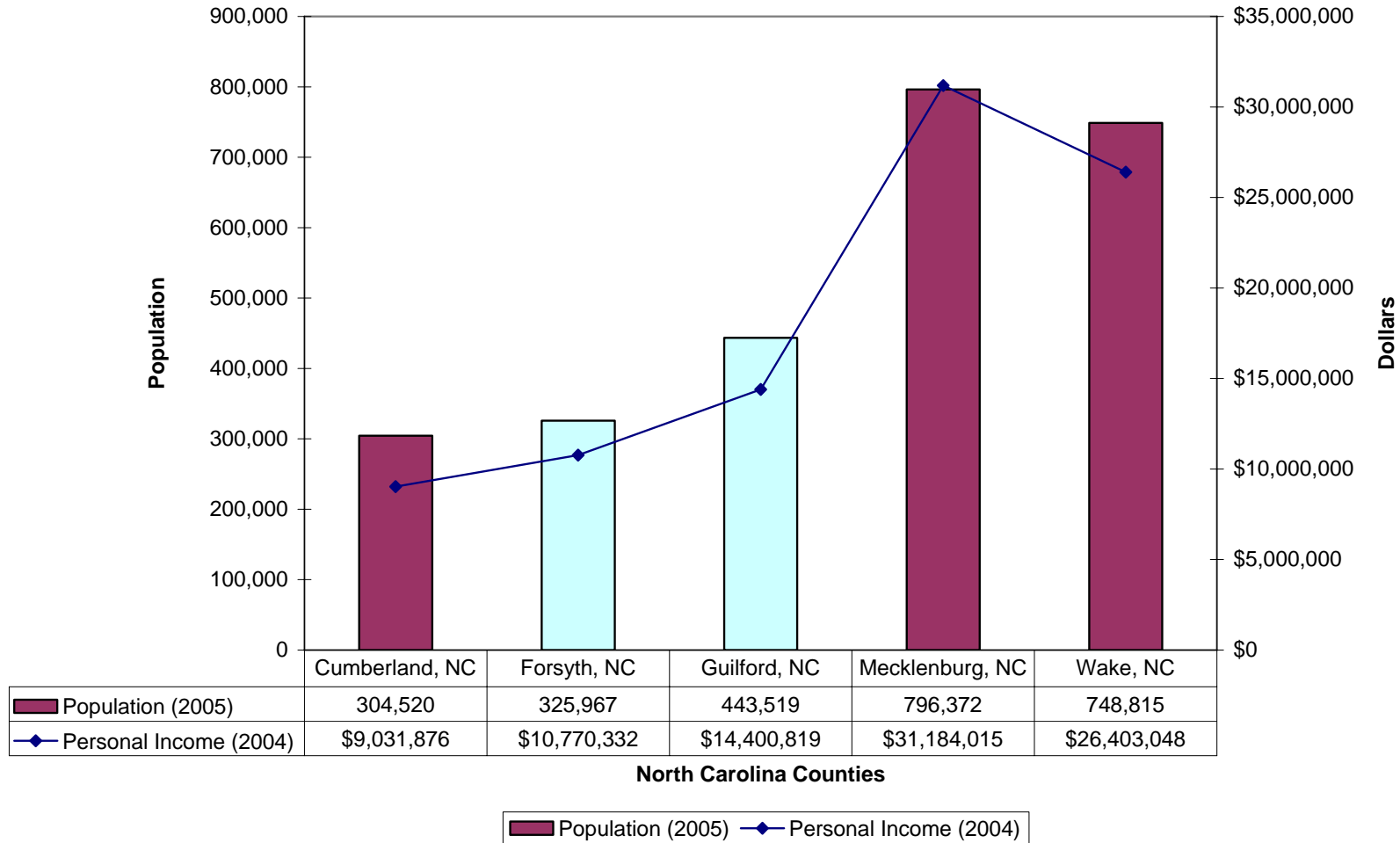


Figure 4. 2004 Top Ten NC Manufacturing Counties
Source: 2004 County Business Patterns

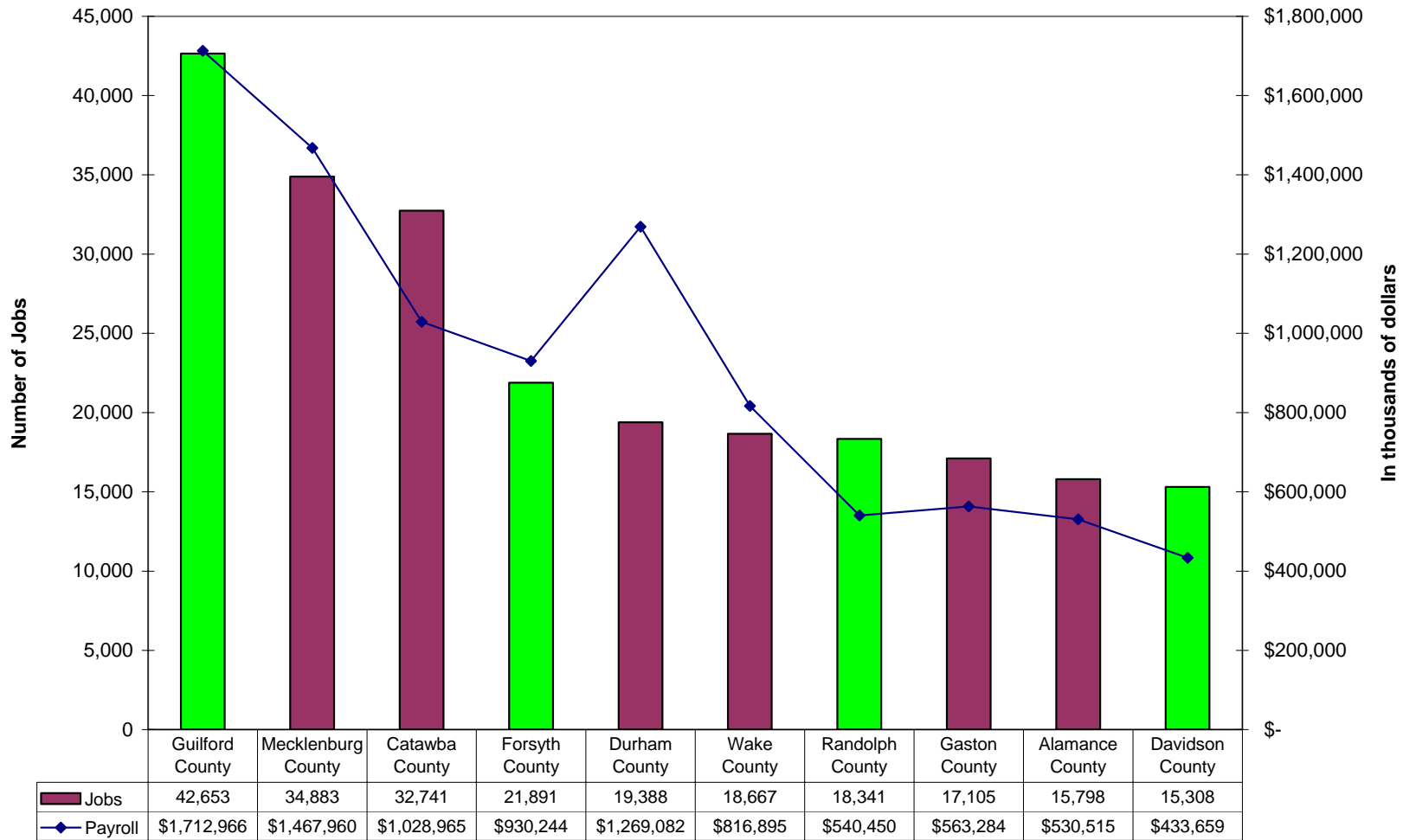
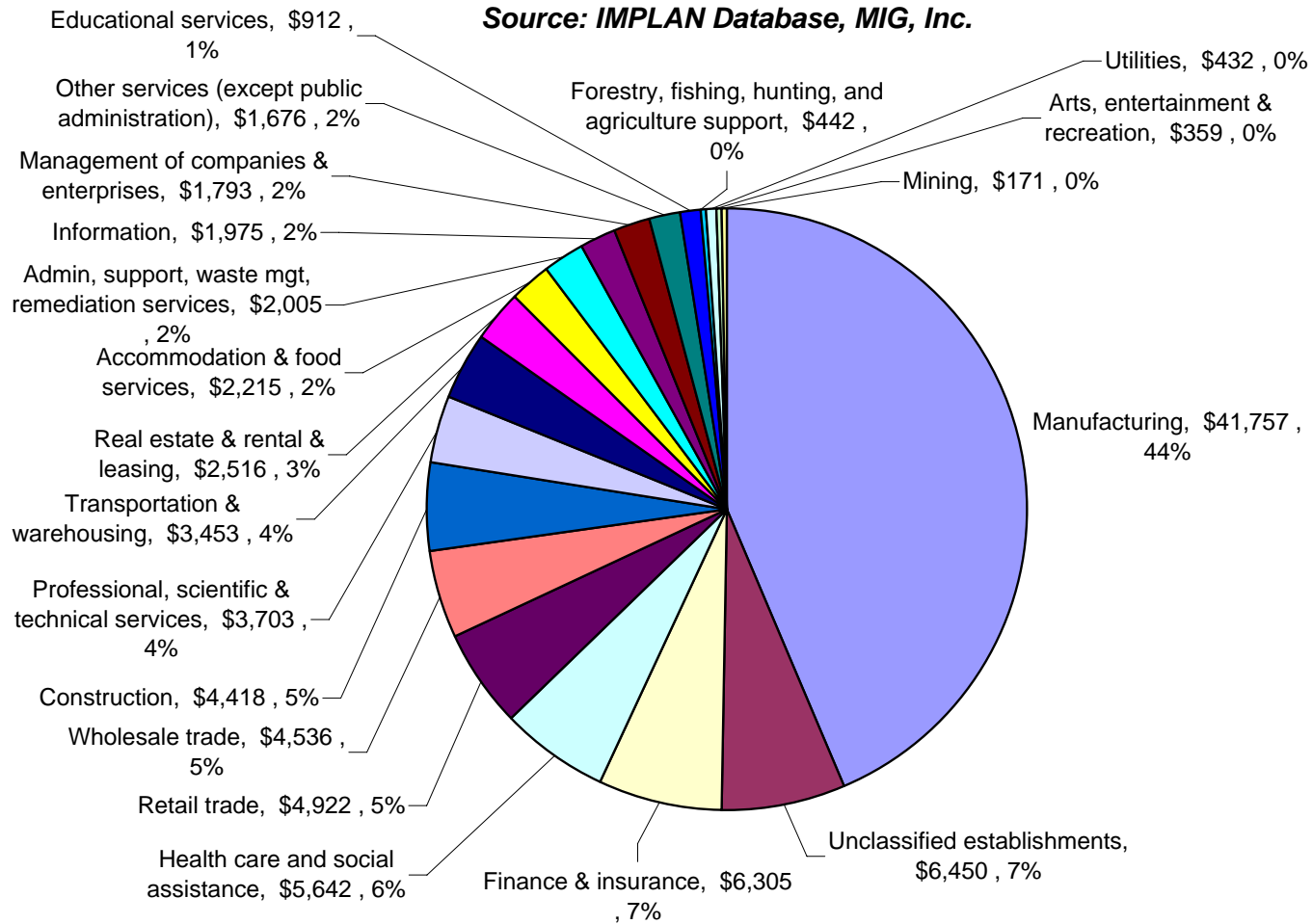


Figure 5. 2004 Triad Area Economic Output: \$95,681 (in thousands of dollars)

--Davidson, Forsyth, Guilford, Randolph Counties--

Source: IMPLAN Database, MIG, Inc.



**Figure 6. 2004 Triad Manufacturing Employment: 97,584 Jobs
(Davidson, Forsyth, Guilford & Randolph Counties)**

Source: IMPLAN dataset, MIG, Inc.

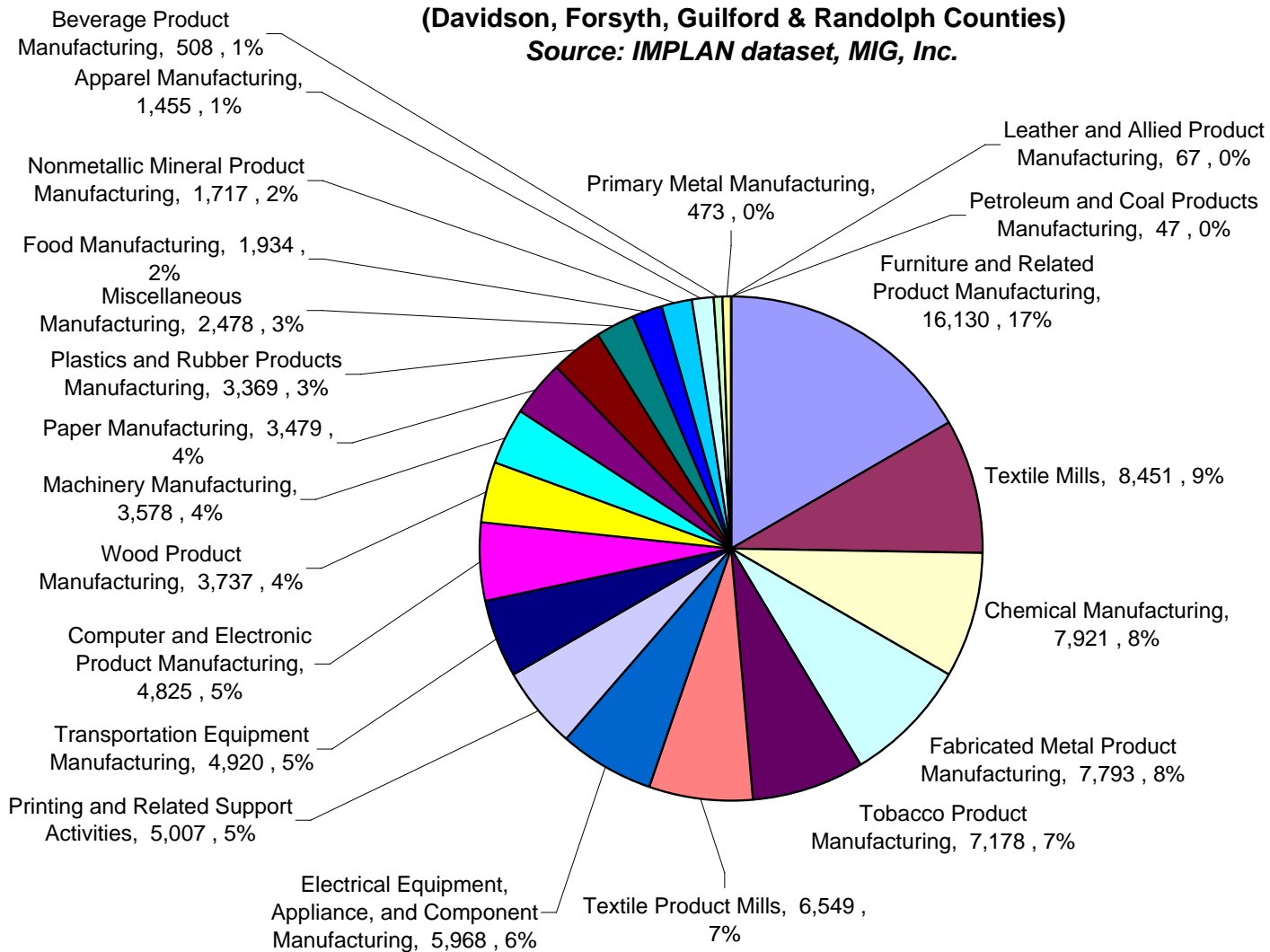


Figure 7. 2004 Top Five NC Counties involved in Furniture Manufacturing
Source: 2004 County Business Patterns

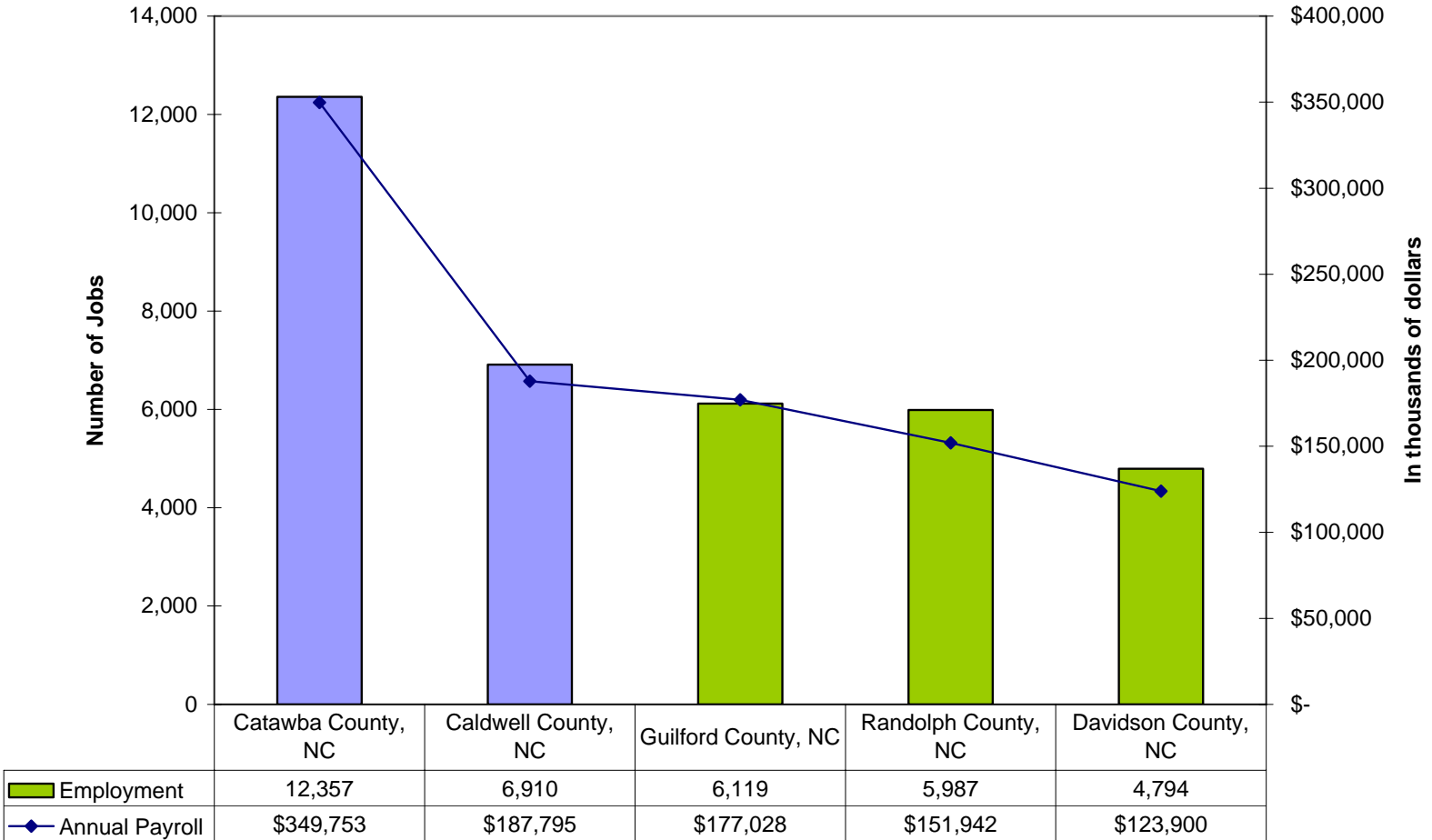
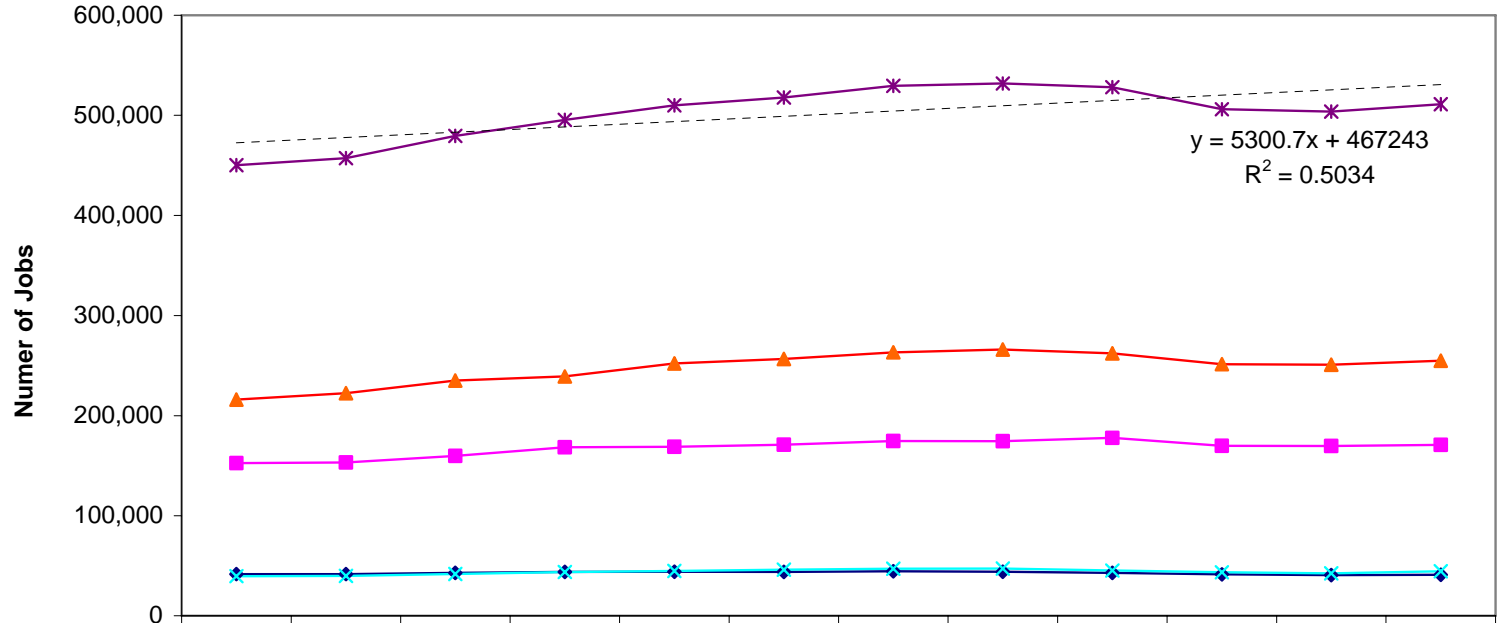


Figure 8. Total Triad Area Jobs 1993-2004
Source: County Business Patterns



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
◆ Davidson County	41,723	41,686	42,901	43,896	44,065	43,974	44,537	44,094	42,878	41,349	40,711	40,999
■ Forsyth County	152,633	153,238	159,791	168,517	168,915	170,994	174,616	174,499	177,802	169,843	169,629	170,822
▲ Guilford County	216,126	222,435	235,023	239,182	252,103	256,664	263,287	266,089	262,272	251,444	250,838	254,754
✧ Randolph County	39,651	39,924	41,784	43,832	44,789	46,166	47,028	47,123	45,241	43,424	42,500	44,577
✧ 4 Counties	450,133	457,283	479,499	495,427	509,872	517,798	529,468	531,805	528,193	506,060	503,678	511,152

Year

◆ Davidson County ■ Forsyth County ▲ Guilford County ✧ Randolph County ✧ 4 Counties - - - - Linear (4 Counties)

APPENDIX I-A: DEFINITIONS OF FURNITURE-RELATED INDUSTRIES

(Source: 2002 North American Industrial Classification Systems Manual,
The Office of Management and Budget)

Listed below are short descriptions of furniture-related industries based on NAICS codes:

23 Construction

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

31412 Curtain and Linen Mills

This industry comprises establishments primarily engaged in manufacturing household textile products, such as curtains, draperies, linens, bedspreads, sheets, tablecloths, towels, and shower curtains, from purchased materials.

31699 Other Leather and Allied Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing leather products (except footwear and apparel) from purchased leather or leather substitutes (e.g., fabric, plastics).

321113 Sawmills

This U.S. industry comprises establishments primarily engaged in sawing dimension lumber, boards, beams, timbers, poles, ties, shingles, shakes, siding, and wood chips from logs or bolts. Sawmills may plane the rough lumber that they make with a planing machine to achieve smoothness and uniformity of size.

321211 Hardwood Veneer and Plywood Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing hardwood veneer and/or hardwood plywood.

321212 Softwood Veneer and Plywood Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing softwood veneer and/or softwood plywood.

321912 Cut Stock, Resawing Lumber, and Planing

This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing dimension lumber from purchased lumber; (2) manufacturing dimension stock (i.e., shapes) or cut stock; (3) resawing the output of sawmills; and (4) planing purchased lumber. These establishments generally use woodworking machinery, such as jointers, planers, lathes, and routers to shape wood.

32614 Polystyrene Foam Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing polystyrene foam products.

32615 Urethane and Other Foam Product (except Polystyrene) Manufacturing

This industry comprises establishments primarily engaged in manufacturing plastics foam products (except polystyrene).

3326 Spring and Wire Product Manufacturing

This industry comprises establishments primarily engaged in (1) manufacturing steel springs by forming, such as cutting, bending, and heat winding, metal rod or strip stock and/or (2) manufacturing wire springs and fabricated wire products from wire drawn elsewhere (except watch and clock springs).

33512 Lighting Fixture Manufacturing

This industry comprises establishments primarily engaged in manufacturing electric lighting fixtures (except vehicular), nonelectric lighting equipment, lamp shades (except glass and plastics), and lighting fixture components (except current-carrying wiring devices).

337110 Wood Kitchen Cabinet and Countertop Manufacturing

This industry comprises establishments primarily engaged in manufacturing wood or plastics laminated on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding). The cabinets and counters may be made on a stock or custom basis.

337121 Upholstered Household Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing upholstered household-type furniture. The furniture may be made on a stock or custom basis.

337122 Nonupholstered Wood Household Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing nonupholstered wood household-type furniture and freestanding cabinets (except television, radio, and sewing machine cabinets). The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337124 Metal Household Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing metal household-type furniture and freestanding cabinets. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337125 Household Furniture (except Wood and Metal) Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing household-type furniture of materials other than wood or metal, such as plastics, reed, rattan, wicker, and fiberglass. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337127 Institutional Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing institutional-type furniture (e.g., library, school, theater, and church furniture). The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337129 Wood Television, Radio, and Sewing Machine Cabinet Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing wood cabinets used as housings by television, stereo, loudspeaker, and sewing machine manufacturers.

337211 Wood Office Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing wood office-type furniture. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337212 Custom Architectural Woodwork and Millwork Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing custom designed interiors consisting of architectural woodwork and fixtures utilizing wood, wood products, and plastics laminates. All of the industry output is made to individual order on a job shop basis and requires skilled craftsmen as a labor input. A job might include custom manufacturing of display fixtures, gondolas, wall shelving units, entrance and window architectural detail, sales and reception counters, wall paneling, and matching furniture.

337214 Office Furniture (except Wood) Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing nonwood office-type furniture. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337215 Showcase, Partition, Shelving, and Locker Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing wood and nonwood office and store fixtures, shelving, lockers, frames, partitions, and related fabricated products of wood and nonwood materials, including plastics laminated fixture tops. The products are made on a stock basis and may be assembled or unassembled (i.e., knockdown). Establishments exclusively making furniture parts (e.g., frames) are included in this industry.

337910 Mattress Manufacturing

This industry comprises establishments primarily engaged in manufacturing innerspring, box spring, and noninnerspring mattresses, including mattresses for waterbeds.

337920 Blind and Shade Manufacturing

This industry comprises establishments primarily engaged in manufacturing one or more of the following: venetian blinds, other window blinds, shades; curtain and drapery rods, poles; and/or curtain and drapery fixtures. The blinds and shades may be made on a stock or custom basis and may be made of any material.

423210 Furniture Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of furniture (except hospital beds, medical furniture, and drafting tables).

442 Furniture and Home Furnishings Stores

Industries in the Furniture and Home Furnishings Stores subsector retail new furniture and home furnishings from fixed point-of-sale locations. Establishments in this subsector usually operate from showrooms and have substantial areas for the presentation of their products. Many offer interior decorating services in addition to the sale of products.

484 Truck Transportation

Industries in the Truck Transportation subsector provide over-the-road transportation of cargo using motor vehicles, such as trucks and tractor trailers.

541410 Interior Design Services

This industry comprises establishments primarily engaged in planning, designing, and administering projects in interior spaces to meet the physical and aesthetic needs of people using them, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture. Interior designers and interior design consultants work in areas, such as hospitality design, health care design, institutional design, commercial and corporate design, and residential design. This industry also includes interior decorating consultants engaged exclusively in providing aesthetic services associated with interior spaces.

541420 Industrial Design Services

This industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the use, value, and appearance of their products. These services can include the determination of the materials, construction, mechanisms, shape, color, and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance. Establishments providing automobile or furniture industrial design services or industrial design consulting services are included in this industry.

541922 Commercial Photography

This U.S. industry comprises establishments primarily engaged in providing commercial photography services, generally for advertising agencies, publishers, and other business and industrial users.

561740 Carpet and Upholstery Cleaning Services

This industry comprises establishments primarily engaged in cleaning and dyeing used rugs, carpets, and upholstery.

811420 Reupholstery and Furniture Repair

This industry comprises establishments primarily engaged in one or more of the following: (1) reupholstering furniture; (2) refinishing furniture; (3) repairing furniture; and (4) repairing and restoring furniture.

Part Two:

Survey of Selected Businesses

by

David L. Bryden, M.L.S.
Director of Library Services
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Executive Summary

Although there have been a significant number of forums featuring Home Furnishings Industry leaders, considerably less attention has been paid to the size and diversity of the large and intricate network of businesses that make up and support the Home Furnishings Industry. These businesses have a significant impact on the role that the furniture industry plays in High Point and the Triad Area. In Part Two of the current study, 200 of the supporting businesses were surveyed in an attempt to gauge economic changes relevant to the furniture industry. Questions were also asked to ascertain the prevailing mood of these industry players.

Most businesses contacted reported that the percentage of their business derived from the Home Furnishings Industry has declined between 5% and 75% over the past three years. There is certainly a mood of frustration among many businesses as summarized by the following quote: *“For whatever reason, corporations don’t feel we are competitive enough and they are moving their business to China. It means a lot of job loss in our area.”* There is also a resiliency and a willingness to change and diversify into new areas as demonstrated by this quote: *“We see a real possibility for growth here.”*

The High Point area has a vast network of specialized businesses and skills operating in support of the furniture industry. **The potential of this diverse network can serve as a unique competitive asset to any company that chooses to locate their furniture-related operations in this area.**

Introduction

In order to provide a more detailed look at some of the supporting players in the furniture industry, we contacted a random sample of businesses in 18 industry sectors. We structured our contacts around a five-item questionnaire administered by telephone (Appendix II-A, p. 81). The final survey question solicited comments about the respondent's business and the furniture industry in general. Although the respondents were chosen at random, the sample size was relatively small and the responses varied widely. Therefore, the results should not be considered representative of the entire industry. These results do, however, provide some insights into the mood surrounding the current impact of the Home Furnishings Industry to some businesses in the four county area.

Methodology

Using SICs and NAICS codes we were able to find representative list of companies within certain industry concentrations.* These codes are more fully explained on the page that follows in the section titled, *Industry codes and the consolidation of industry sectors*. In choosing the codes, we looked first to industries that have a direct impact on the furniture industry and are quite easy to find. "Wood veneers" and "foam production" have a direct correlation to the furniture industry as a whole. Other industry groups are supportive of the industry but are less obvious. Our intention was to identify some of these pertinent industry groups, make a list of the companies in these areas, contact the companies and then survey them about their relationship and support of the broader furniture industry. The survey queried these companies about: (a) the percentage of their business that is conducted with the furniture industry, (b) their overall relation to the industry, (c) increases or decreases in their business with furniture companies, (d) and their perspective on the health of this broad area known as the furniture industry.

* **Note:** industry codes are a very effective method to make a list of companies by type of business and concentration of that business. One concern that the researcher has to face is that many companies will have a variety of codes. A company might have one code for one part of the business and a code that represents another part of their business but normally a company will only be located by one of these codes. In "printing" for example, we found companies that do "paper" printing but with a slightly broader code description we can actually find companies that print mailers or make labels. A broader view of the codes allows some flexibility and we get more representative companies (see Appendix II-B, p. 82).

Searches were done in the *ReferenceUSA*© database, a business directory with a listing of 13 million companies found in the United States. The developers of this database utilize the yellow and white pages of telephone books and then verify the information by telephone. It is certainly one of the broadest resources of its kind. In addition to searching by the more general name and yellow page heading, this search interface enabled us to do code searches. By searching in the *ReferenceUSA*© database for four North Carolina county areas: Davidson, Forsyth, Guilford, and Randolph, we developed a rather extensive list from which to draw our sample. The comprehensive list, so derived, is presented in Appendix II-B (p.82). This appendix is illuminating because it provides not only the names of furniture industry supporting businesses employers but also the number of employers and employees by county.

Our intention was not to be exhaustive in our listing of the companies in this area but to locate and contact companies that provide a representative sampling of the businesses that support the furniture industry, herein referred to as *Supporting Businesses*. By using a combination of industry codes and industry descriptions, our intent was to construct a list of companies in the four counties that met our criteria.

Industry codes and the consolidation of industry sectors

While it is perfectly acceptable to discuss changes that occur within industry groups, one needs to keep in mind that industry within the United States is actually classified into narrowly focused groups. These groups are more than mere descriptive categories but are broad areas that are then sub-divided by industry codes. The earliest of these codes are the SIC (Standard Industrial Classification) system that sought, during the time of the Great Depression, to more closely track economic activity in the US. The codes provided a simple numeric pattern that could be assigned to industry and then “like industries” could be grouped and tracked. These codes were used to monitor economic activity.

The codes were revised every few years. The last major revision of these codes was done in the 1980s when the older SICs were revamped and the new NAICS (North America Industry Classification System) became the standard for use by the government.

The new codes were changed to reflect developments in the global economy (they wanted to “harmonize” with global codes), changes in the North American market (NAFTA), and new perspectives in what became known as the “new economy”. After their inception in the late 1980s, use of the new codes was not widespread but they were used by government agencies and for government publications. The *Economic Census* and the *County Business Patterns* now publish using the revised code set although many business publications that publish broad industry data still use the SICs in addition to the NAICS.

Business Classifications

Table 2-1 provides an overview of our database of companies that are involved to some degree in information, manufacturing, marketing, or handling furniture and related products. Some companies are exclusively furniture-oriented, for others the furniture industry makes up a smaller portion of their business. Companies that have multiple locations are listed more than once. Some companies are active in more than one segment and their employees appear more than one segment. While we have undoubtedly included some companies that should have been omitted and omitted some companies that should have been included, this database was created to demonstrate the diversity of furniture-related resources that exist in the four-county area.

Table 2-1

Business Classification	Number of Businesses	Number of Employees
Commercial Photography *	106	715
Commercial Printing *	293	5,400
Corrugated Boxes & Packaging *	56	2,709
Educational Resources *	4	100**
Fabric and Thread Mills *	45	4,332
Foam Producers *	13	629
Furniture Designers	61	252
Furniture Factoring	4	61
Furniture Manufacturing	274	
Furniture Retailers	253	3,792
Furniture Show Rooms – High Point	416	4,145
Glass and Mirror Companies *	48	1,244
Hardware Companies *	47	2,358
Lighting Companies *	11	284
Mattress Companies *	28	1,167
Paint & Coating Companies *	28	891
Pallet Companies *	10	481
Plywood & Veneer Companies *	53	1,275
Rug & Carpet Companies *	86	462
Spring Wire Companies *	6	485
Trade Associations *	9	60
Trade Publications *	4	
Trucking Companies *	182	6,825
Upholstery Manufacturers	47	7,004
Warehouse Distribution Companies	5	198
Totals	2,089	44,869***

* *Companies from these categories were included in our telephone sample*

** *Average number of yearly graduates*

*** *Excluding Furniture Manufacturing and Trade Publications*

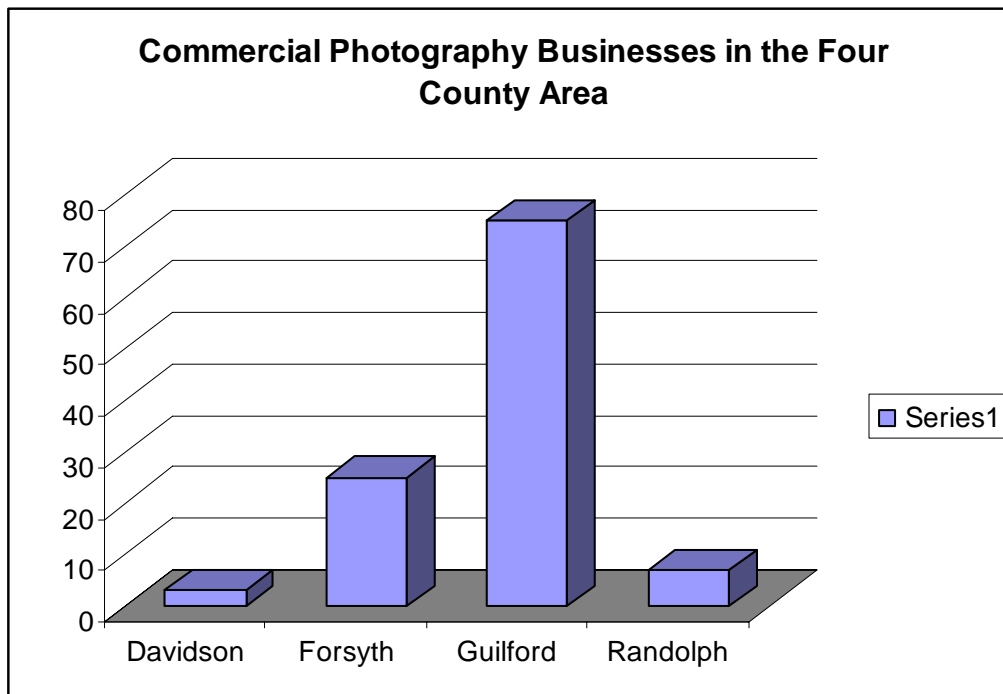
The findings of the sectors sampled are presented in the sections below. Again, the comprehensive lists of all Supporting Businesses are located in Appendix II-B (p. 82).

Commercial Photography

Codes: All of the establishments fall into the NAICS 541921 code that includes commercial as well as portrait studios.

The four counties are rich in the number of Commercial Photography ventures. High Point houses a large number of establishments that work with the furniture industry. Companies that are found in the High Point area include *Alderman*, *Albion* and *Atlantic Studio*. They all do heavy business with the furniture industry and have experienced a small decrease in their recent business. Of the companies queried about their relationship to the furniture industry, it was indicated that furniture accounted for about 20 % of their business.

Figure 2-1



- “We are seeing a shift from manufacturers, who used to be our base, to distributors.”

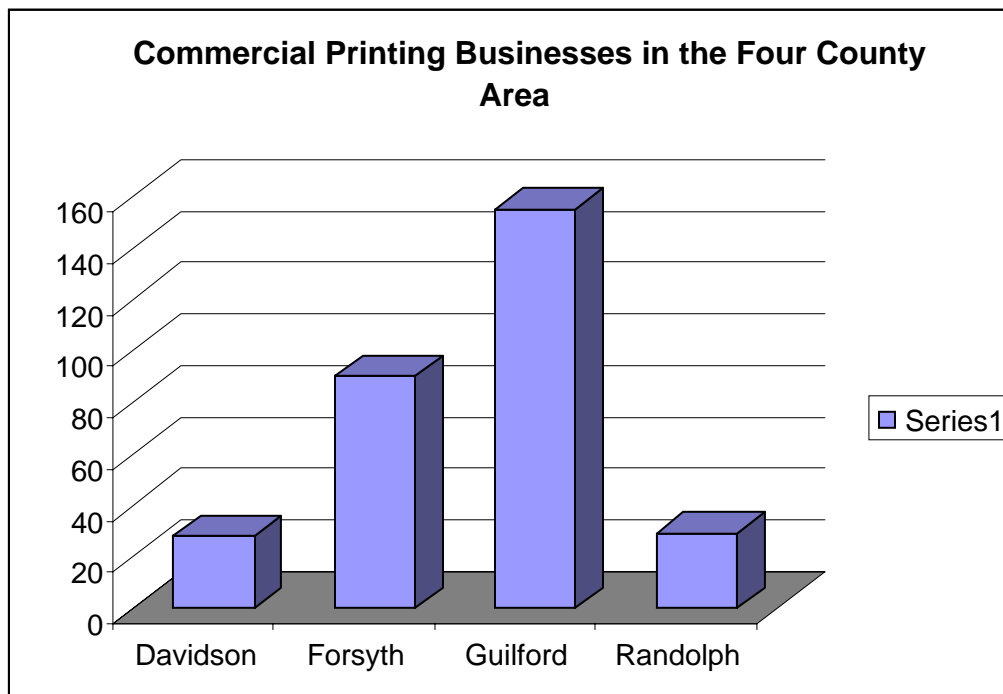
Employees 12	Sales under \$5 Million
Percentage of Furniture-Related Business	75%
Business Decreasing	15%

Commercial Printing

Codes: The NAICS for this area are 32311009 *Commercial Lithographic Printing* and 32311301 *Commercial Screen Printing and Other Commercial Printing*.

As one would assume, in the four county area this is an industry with a large number of companies. Companies such as *Hunsucker Printing Co* in Asheboro, *Riverwood Hall* in Thomasville and *Hutchison Allgood Company* in Winston Salem all reported that they did business with the furniture industry. Davidson and Asheboro County businesses had a higher average percentage of companies that did business with furniture firms than Forsyth or Guilford. The survey numbers for Guilford County were diluted by the large number of companies in this category.

Figure 2-2



Twelve printing companies in the four county area were contacted and interviewed.

Sales for these companies ranged from under \$500,000 to over \$10 million. Most printing companies interviewed find their furniture-related business decreasing between 15-20%.

- *“Business in general is down but some new business has been gained. We are opening a plant in China to sell to Chinese companies.”*

3 Employees	Sales less than \$500,000
Percentage of Furniture-Related Business	40-50%
Business Decreasing	15-20%

- *“We haven’t lost one or two large companies – it’s just that business is slowing down in general. We’ve been fortunate.”*

35 Employees	Sales \$5 to \$10 Million
Percentage of Furniture-Related Business	20%
Business Decreasing	15-20%

- *“Don’t go to China! A lot of the business is coming back for us to bind that has been printed in China. Can it be that much cheaper to send something overseas to print and then have it bound down the street!”*

60 Employees	Sales \$5 to \$10 Million
Percentage of Furniture-Related Business	50%
Business Decreasing	15%

- *“We’ve gotten what we deserve. We’ve sent all our business overseas and now we’re paying the price!”*

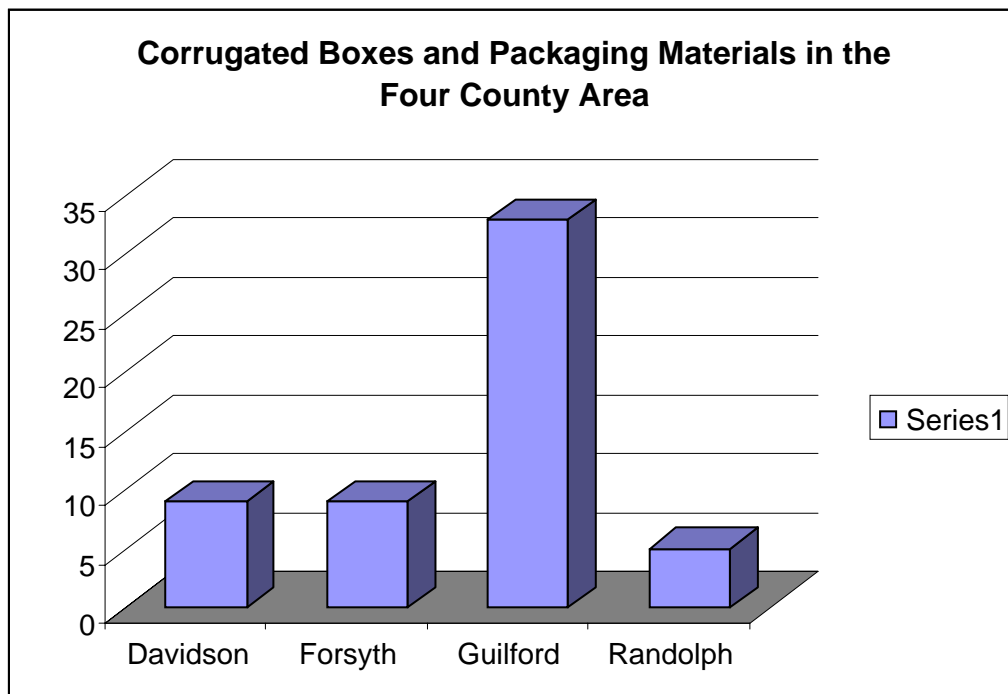
5 Employees	Sales less than \$500,000
Percentage of Furniture-Related Business	5%
Business Decreasing	30%

Corrugated Boxes and Packaging

Codes: NAICS code 32221102 *Corrugated & Solid Fiber Box Manufacture* is the most narrowly focused code. Broader codes include 32221201 *Folding Paperboard Box Manufacturing* and a still broader code of 42413020 *Industrial Paper Merchant Wholesale*.

This includes the manufacture of boxes and box materials. As in many of the other areas of interest, we find a great deal of activity in Guilford County. Companies such as Carolina Containment in High Point, Highland Containers in Jamestown, and Box Board Products in Greensboro are companies that are well known for boxboard production.

Figure 2-3



Educational Resources

In addition to the large network of manufacturers, marketers, suppliers, retailers, designers and others that make up the furniture industry in the four-county area there are a number of specialized educational resources closely tied to the furniture industry. They are (a) the Bienenstock Furniture Library, (b) Guilford Technical Community College, (c) High Point University, and (d) Randolph Community College.

Bernice Bienenstock Furniture Library, High Point, NC

The Bienenstock Furniture Library provides exceptional resources for research in the areas of interior decoration, furniture and architecture. The Bienenstock Furniture Library, established in 1970, is a recognized world center for research on furniture, other interior furnishings, decorating, and architecture. The comprehensive collection of volumes on the history of furniture published since 1640 includes complete collections of the original works of 18th century furniture masters Chippendale, Sheraton and Hepplewhite. The Furniture Library provides its storehouse of information, illustration and inspiration to those working in industry, the design community, and education.

Guilford Technical Community College, High Point, NC

Guilford Technical Community College offers a Furniture Upholstery program leading to certification as a professional upholsterer. The demand for upholsterers in the four county area exceeds the approximately 12 yearly graduates of the program. The Furniture Upholstery program at GTCC prepares students to become professional upholsterers. Graduates of the Furniture Upholstery program would qualify for positions with upholstered furniture manufacturers. Currently between 10 and 12 students receive certificates in Upholstery each year.

High Point University, High Point, NC

The Knabush-Shoemaker International School of Home Furnishings and Design at High Point University is a premier resource for the furniture industry. The University offers majors in both Home Furnishings Marketing and Interior Design. Norton Hall houses the programs and serves as a state-of-the-art learning center and meeting facility for professionals in the home furnishings industry. Norton Hall is a focal point for many furniture-related events throughout the year.

Over 35 graduates in Home Furnishings and Interior Design are available to the Home Furnishings Industry each year. For over 20 years, the unique major in *Home Furnishings Marketing* has been successfully training students for marketing and management positions with home furnishings manufacturers, home furnishings suppliers, or furniture retailers. Approximately 15 students per year graduate with majors in Home Furnishings Marketing.

The *Interior Design Major* will prepare students for a variety of interior design positions with manufacturers and/or retailers or independent practice. Interior design

majors take selected business and home furnishings marketing classes in addition to a rigorous selection of interior design classes leading to a professional interior design degree. Approximately 20 students per year graduate with majors in Interior Design.

Randolph Community College, Asheboro and Archdale, NC

Randolph Community College offers highly respected programs in Commercial Photography and Interior Design that graduate approximately 60 qualified photographers and interior designers each year.

Fabric & Thread Mills

Codes used: NAICS 31321010 *Broadwoven Fabric Mills* and NAICS 31331213 *Other Textile & Fabric Finishing Mills*. NAICS 32221404 *Fiber, Can, Tube, & Drum Mfg* and NAICS 31311103 for *Yarn Spinning Mills*. Some of the companies listed here are also involved in the label industry and have codes for printing as well as fabric.

Guilford County hosts the largest concentration of broadwoven mill establishments in the four county area. Companies such as *Chambers Fabrics* in Guilford County, *Lantal Textiles* in Forsyth and *Asheboro Elastics* in Randolph County all had some furniture industry involvement. *Chambers* reported a high percentage of business with the furniture industry. Some of the larger companies in the Threadmill category are *Hendrix Batting Company* a private High Point firm that makes batting and filling and *Vita Nonwovens* a company that makes adhesives and fiber products and produces its products in other areas of the country as well.

Figure 2-4

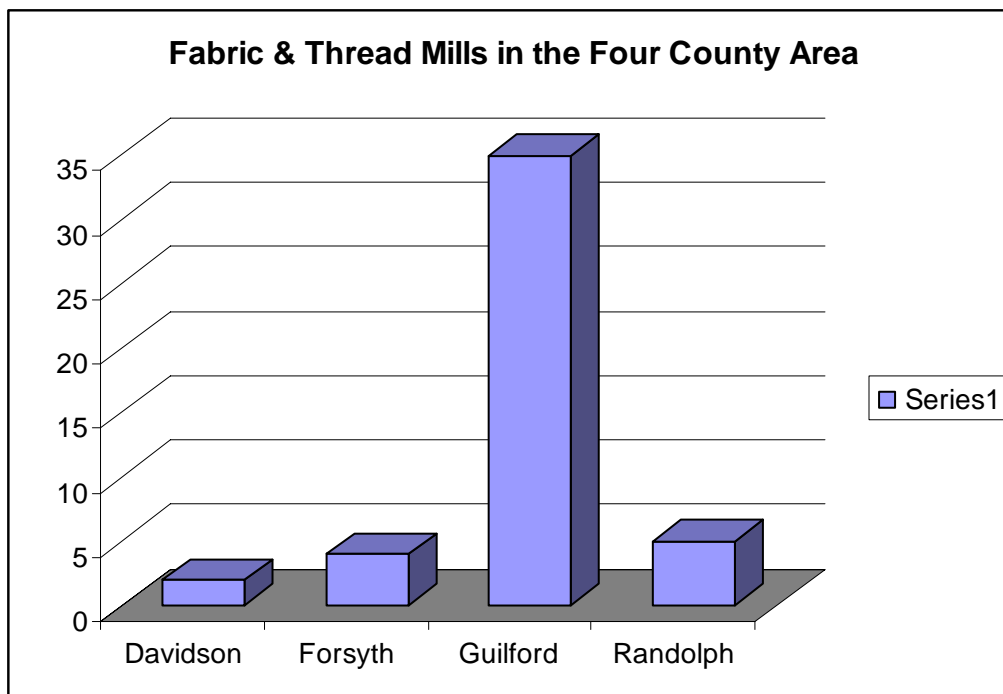
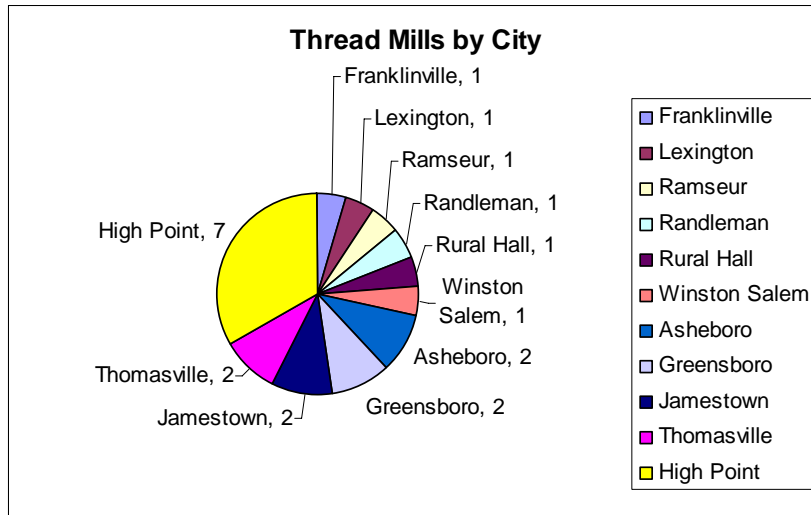


Figure 2-5



Eighteen fabric/thread mills in the four county area were contacted and interviewed. Sales for these companies ranged from under \$500,000 to over \$10 million. Most fabric mills interviewed find their furniture-related business decreasing.

- “ *The small amount of business we have done with furniture companies has gone overseas.*”

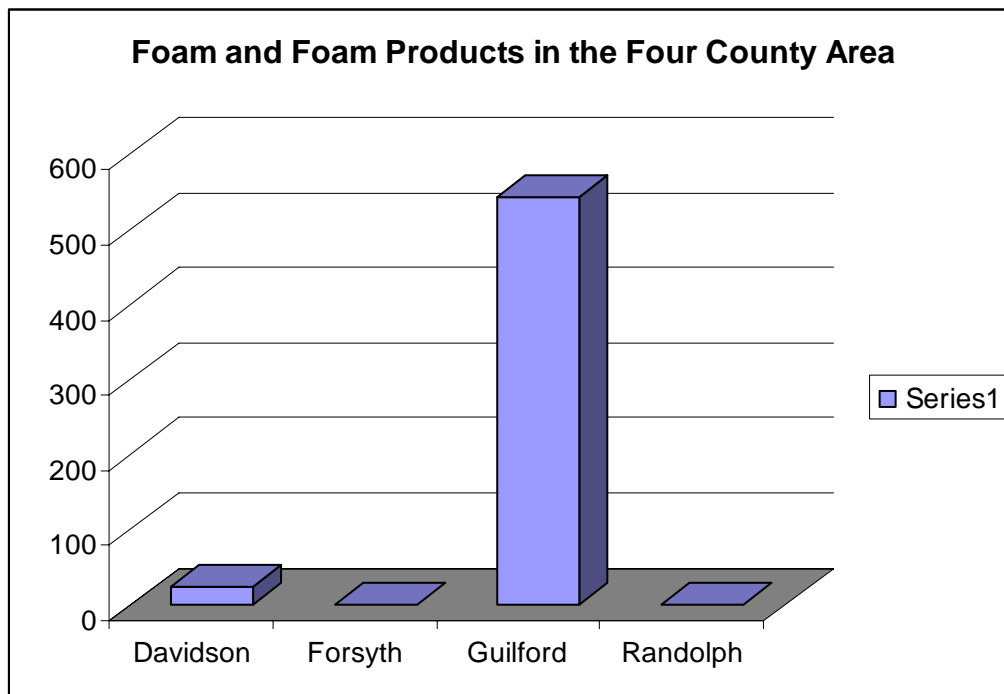
Employees	Sales
Percentage of Furniture-Related Business	1%
Business Decreasing	75%

Foam Producers

Codes: We used the narrowly focused NAICS 32615004 *Urethane & Other Foam Prod Mfg* and the broader SIC 3086-01 *Plastics-Foam (Manufacturers)*.

The foam and foam products industry clearly provides a product to the furniture industry. Even with the modest reports that we received to our queries about “furniture - related business”, the surveyed companies’ involvement with the furniture industry was very high. Guilford County respondents said that 85% of their business was related to the furniture industry. This was less in the other counties. In Guilford County only one of the companies located was in Greensboro while the rest were in Archdale or High Point.

Figure 2-6



Six foam companies in the four county area were contacted and interviewed.

Sales for these companies ranged from under \$500,000 to over \$1 million. Most foam companies interviewed reported between 40% and 100% of their business was furniture-related. These companies reported both increases and decreases in furniture-related business.

- *“I sell to low to middle end manufacturers and it seems that nobody’s going into the business anymore. I don’t know what’s going to happen in five years.”*

Employees 1	Sales under \$500,000
Percentage of Furniture-Related Business	100%
Business Decreasing	30%

- *“Business has doubled in the past two years.”*

Employees 11	Sales under \$1 million
Percentage of Furniture-Related Business	100%
Business Increasing	100%

Furniture Designers

Codes: NAICS code that covers this type of design work is 54142001 *Industrial Design*

Services which brings up many companies that do other types of design work in addition

to furniture design. To create a more custom list, we used the older SIC code 5712-17

Furniture-Designers & Custom Builders.

Figure 2-7

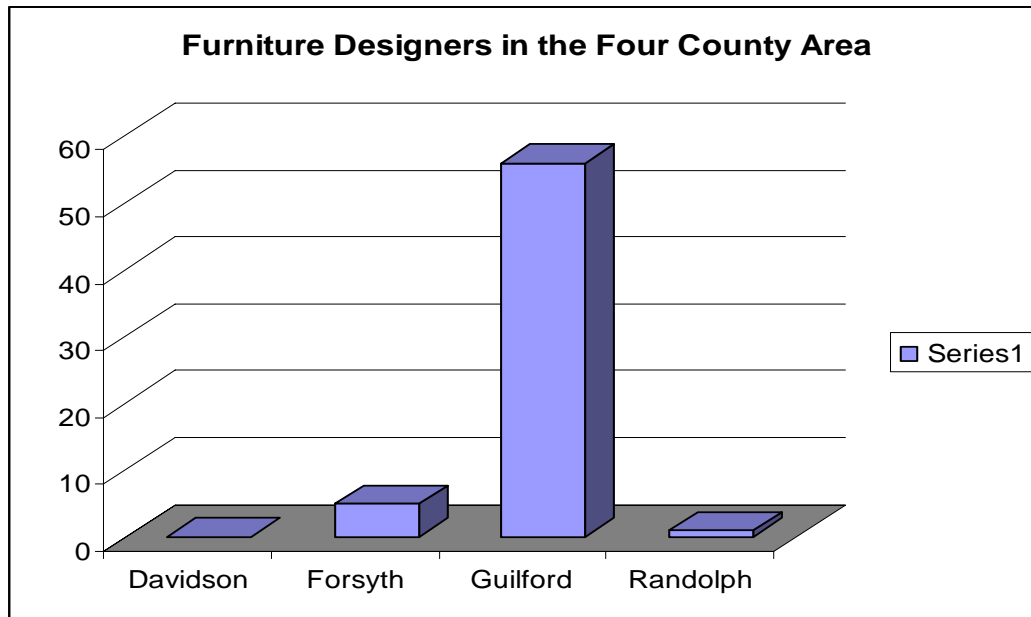
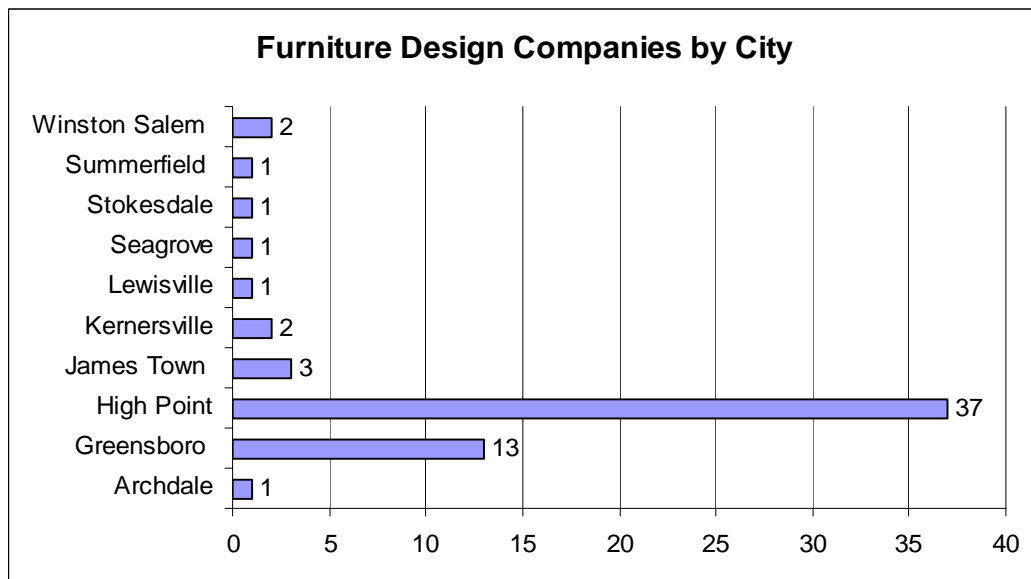


Figure 2-8



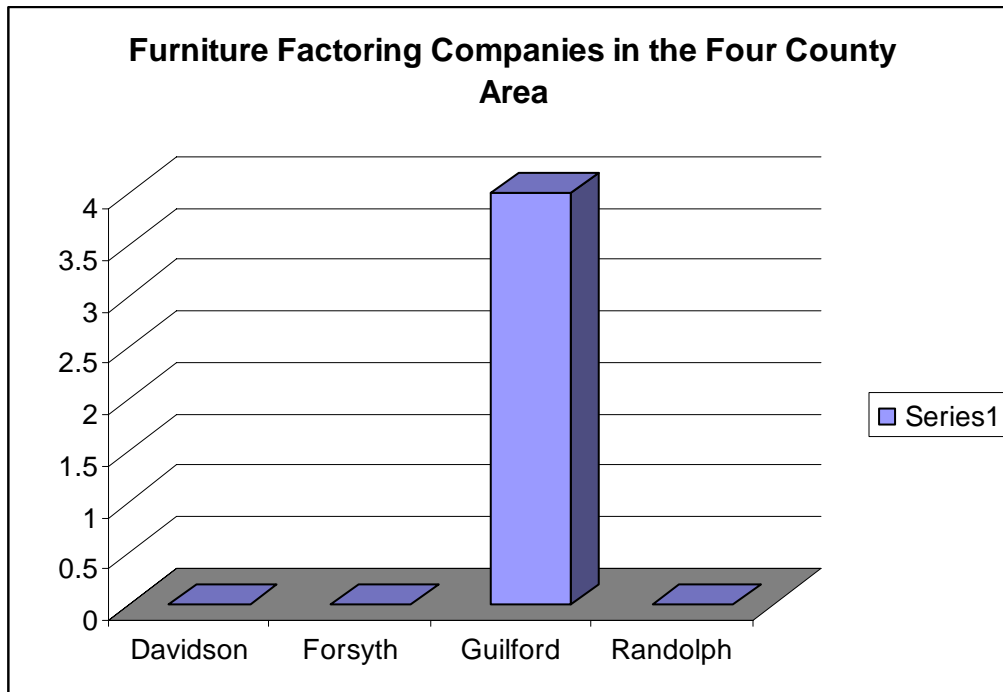
Furniture Factoring

Codes: 52229806 *All Other Nondepository Credit Intermediation* and an SIC of 6153-01

Factors.

Factoring and Financing is one of the most narrowly focused code areas that we have considered.

Figure 2-9



Furniture Manufacturing

Codes: SIC 2599 *Furniture Manufacturers* and NAICS 33712709 *Institutional Furniture Mfg.*

As expected, we found a large number of companies in the four county area that fall into the code for furniture manufacturing. With 227 companies in Guilford County and 41 in Davidson County, we found what we thought was a reasonable representation of the furniture manufacturing core in these counties. In Randolph County, we also found a large number, with over 30 firms listed in that county. Forsyth County was a bit more difficult and we had to broaden our search to find companies that would be a part of the industry. As well as the two codes listed above we added a code for other institutional furniture but even with this addition we still only found about eight including just two large companies; *Brady Furniture* (a private furniture company) and *Moyer Diebel*, a private company that produces restaurant equipment.

Figure 2-10

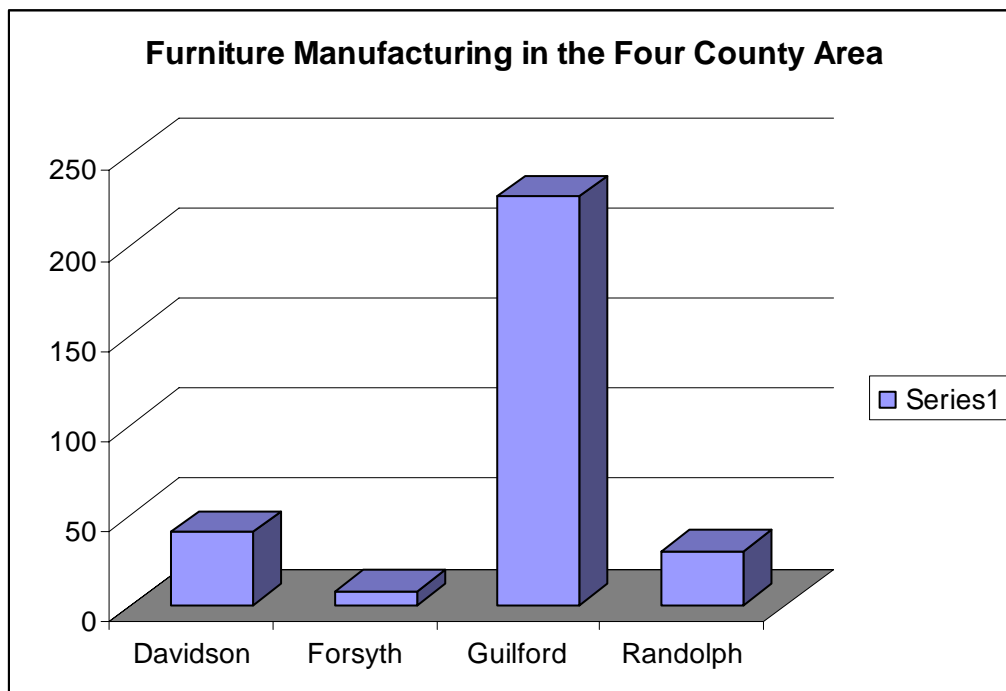
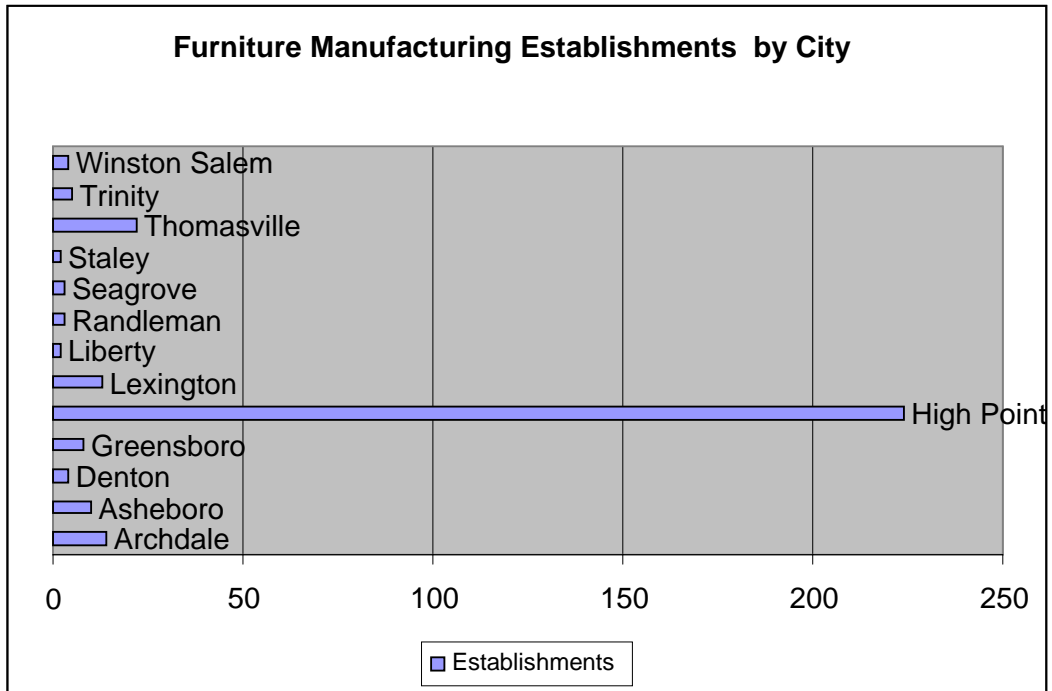


Figure 2-11

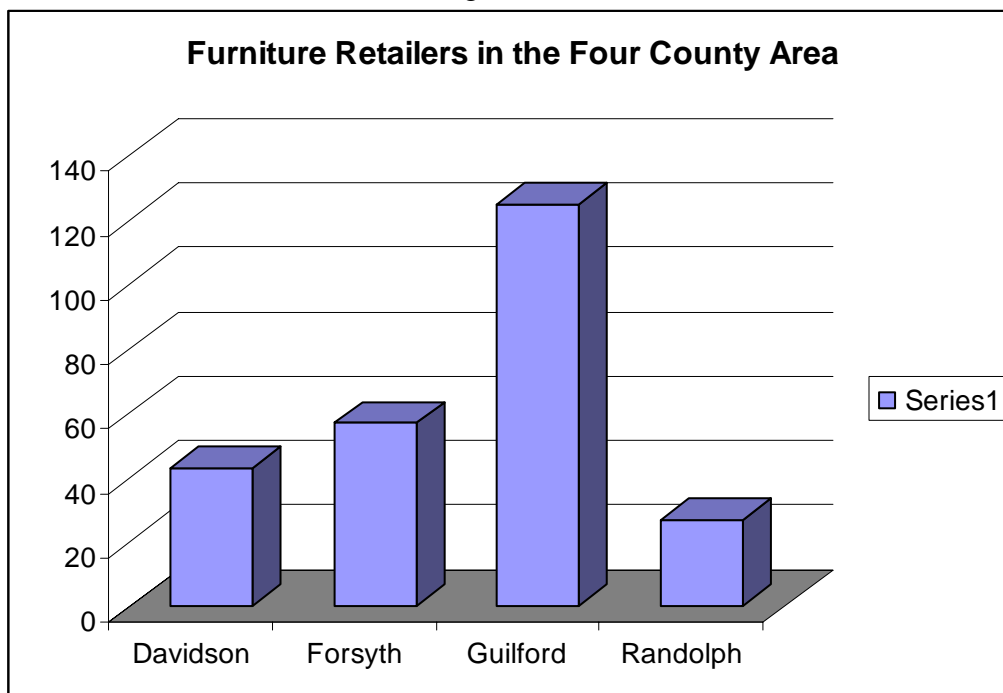


Furniture Retailers

Codes: NAICS codes 44211012 *Furniture Stores*.

In the Triad and surrounding counties the number of furniture retail establishments exceeds the number of any of the other furniture-related categories that we have looked at in this study. In Guilford County there are 568 store, storefronts and manufacturers listed. In our list we wanted to separate the High Point area showrooms from the regular retail furniture stores. The following chart shows a breakdown of furniture retailers and separates the “High Point Showrooms” from the retail establishments. Guilford County still has a large number of retail establishments which include large retail stores such as *Furnitureland South* and the *Colfax Furniture* organization.

Figure 2-12



The Figure 2-13 shows a comparison of furniture retailers by county but without including the large number of furniture showrooms and company offices that were depicted in Figure 2-12 above.

Figure 2-13

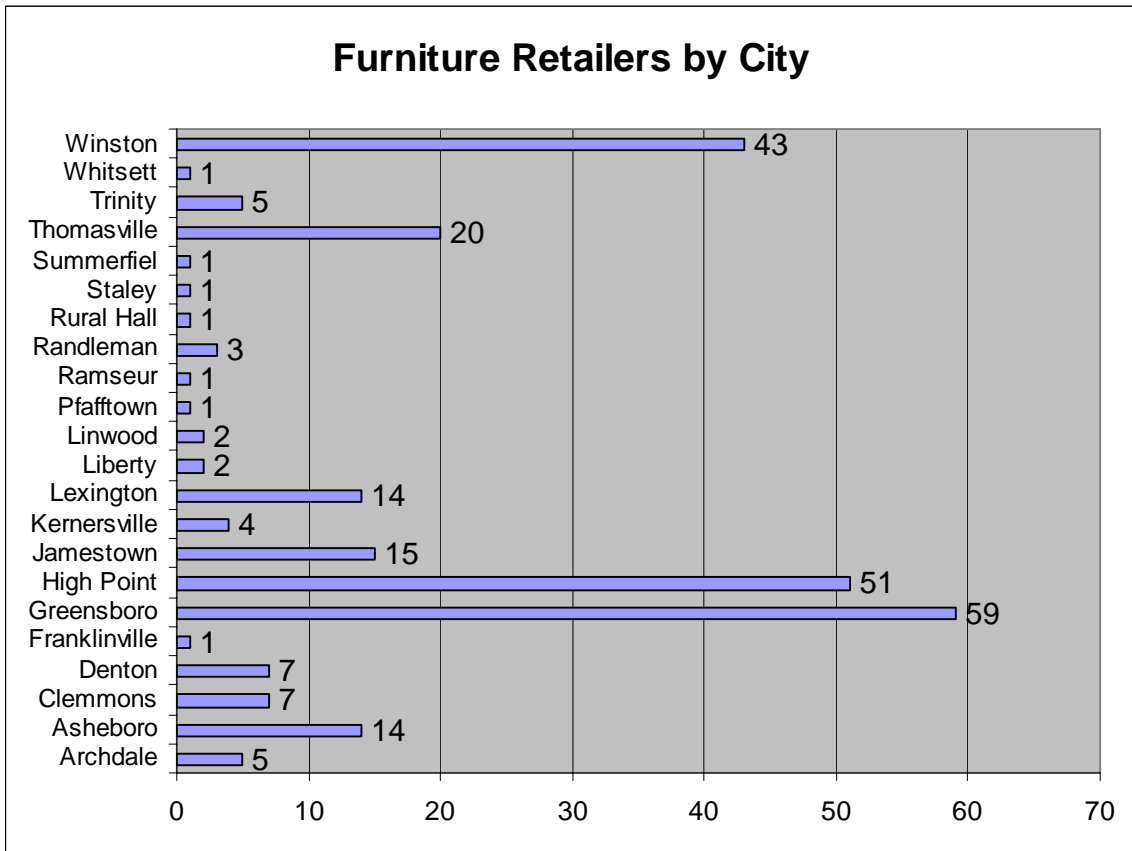
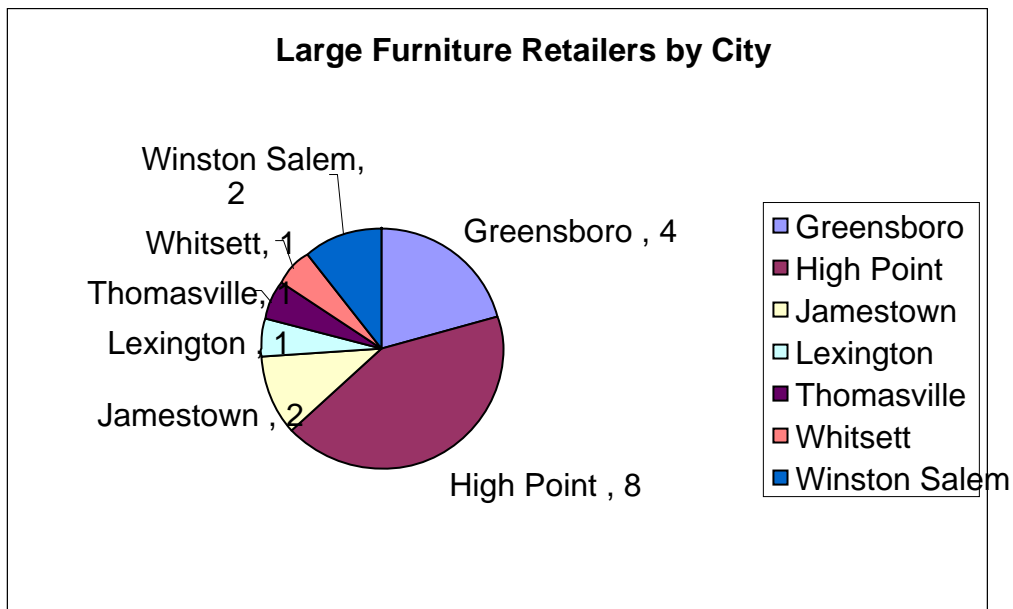
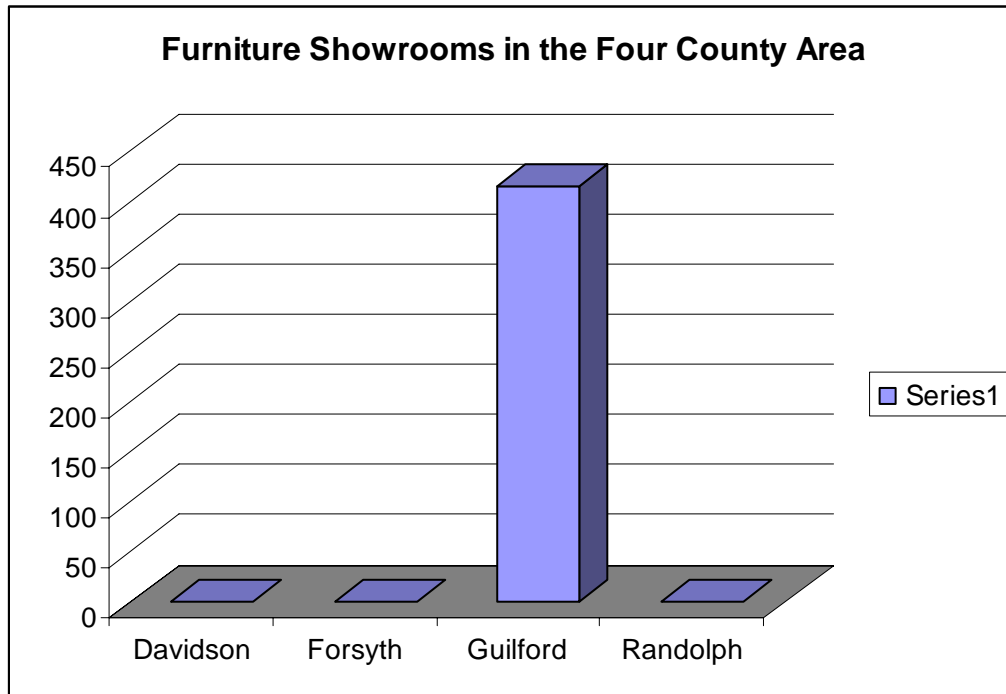


Figure 2-14



Furniture Show Rooms – High Point

Figure 2-15



Glass and Mirror Companies

Codes: NAICS 32721511 for *Glass Prod Mfg Made Of Purchased Glass* and NAICS 44419033 for *Other Building Material Dealers*.

Companies in the area that we surveyed include *A Better View Glass & Mirror* and *Furniture City Glass & Mirror*. Companies located in this area indicated some involvement with the furniture industry but it was modest. Most indicated that they were more involved in the past than now. They are especially busy with the furniture industry at times just before the Furniture Market. Davidson County was highly involved with its *Finch Industries* and Guilford County had 15 “Glass and Mirror” establishments in High Point.

Figure 2-16

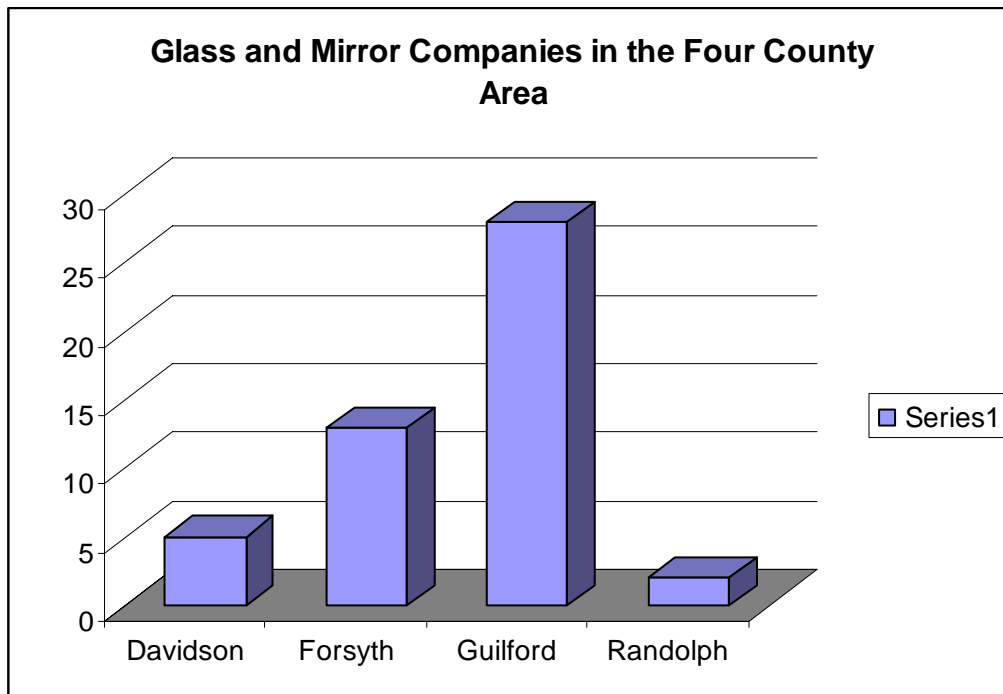
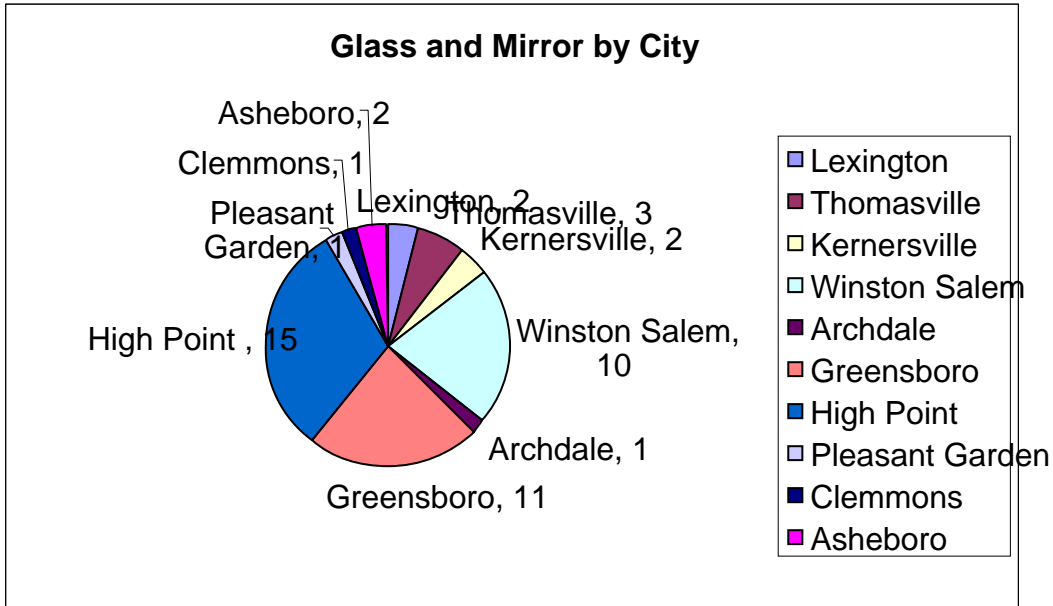


Figure 2-17



- “We see a real possibility for growth here.”

Employees 11	Sales under \$1 Million
Percentage of Furniture-Related Business	15%
Business Increasing	10%

- “We seem to work pretty well together.”

Employees 30	Sales \$1-5 Million
Percentage of Furniture-Related Business	5%
Business Increasing	10%

- “They are not as extravagant at market as they used to be. The furniture industry has dwindled over the past 10 years or so.”

Employees 12	Sales under \$1 Million
Percentage of Furniture-Related Business	25%
No Increase or Decrease	0%

Hardware Companies

Codes: NAICS 32199911 for *Miscellaneous Wood Prod Manufacturing* and 42371007 for *Hardware Merchant Wholesalers*.

The furniture industry is perfectly matched with the fasteners, hinges and other hardware. Randolph County includes some fairly large companies such as *Collier-Keyworth Co* (a manufacturer of Chair mechanisms and bases – a division of Leggett Platt). Davidson County has *Ultra-Mek Inc* (a privately held company based in Denton). Both companies stated that they did a high percentage of business with the furniture industry. Again, as you get further away from Guilford County, the number of companies that work with the furniture industry is reduced.

Figure 2-18

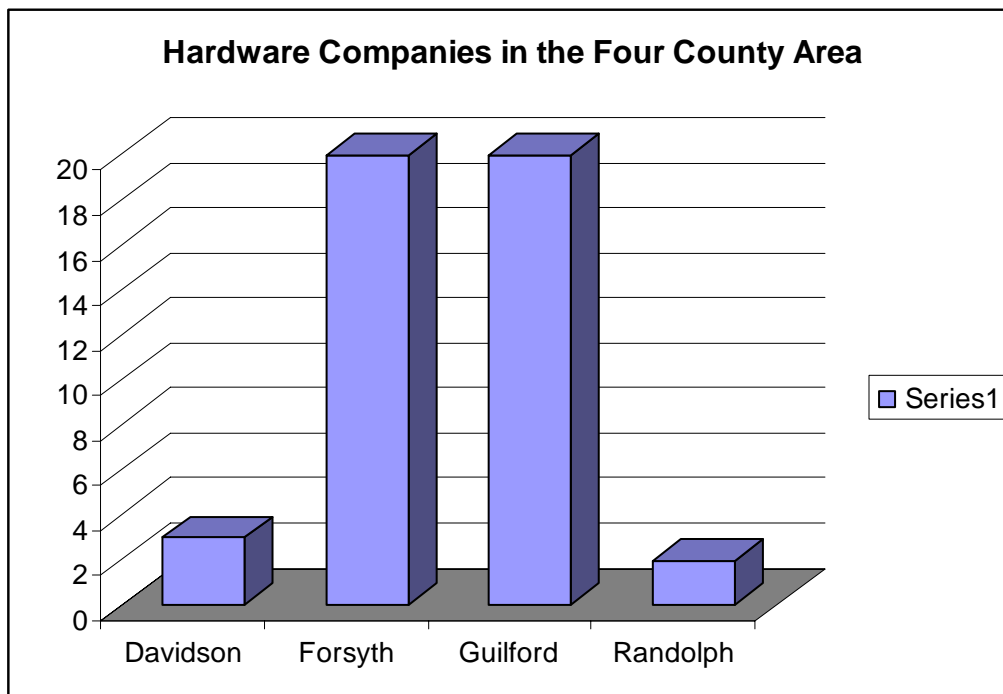
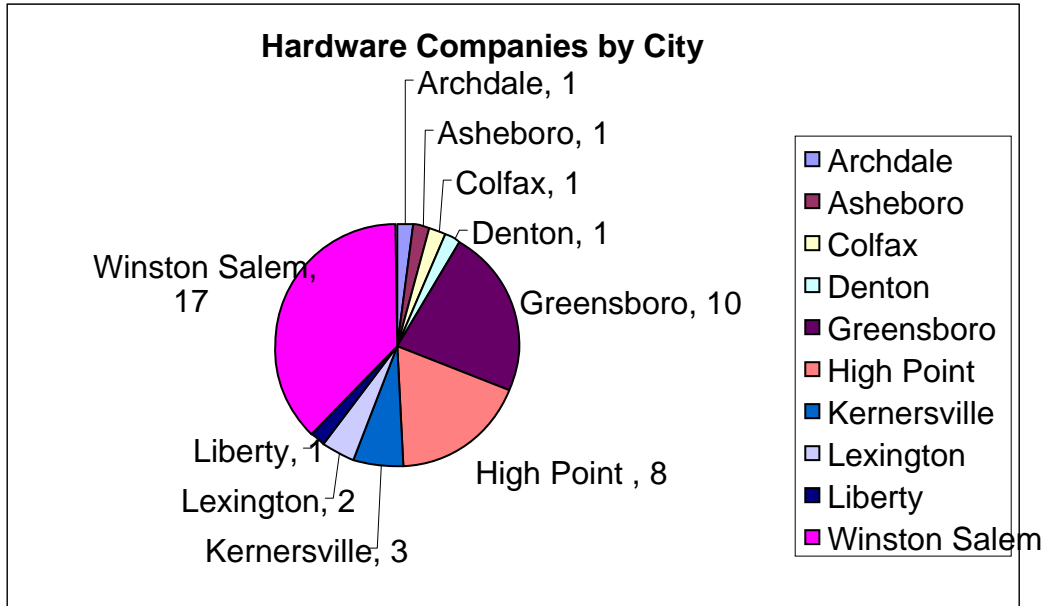


Figure 2-19



- “We need to quit shooting ourselves in the foot and loosing our business to China!”

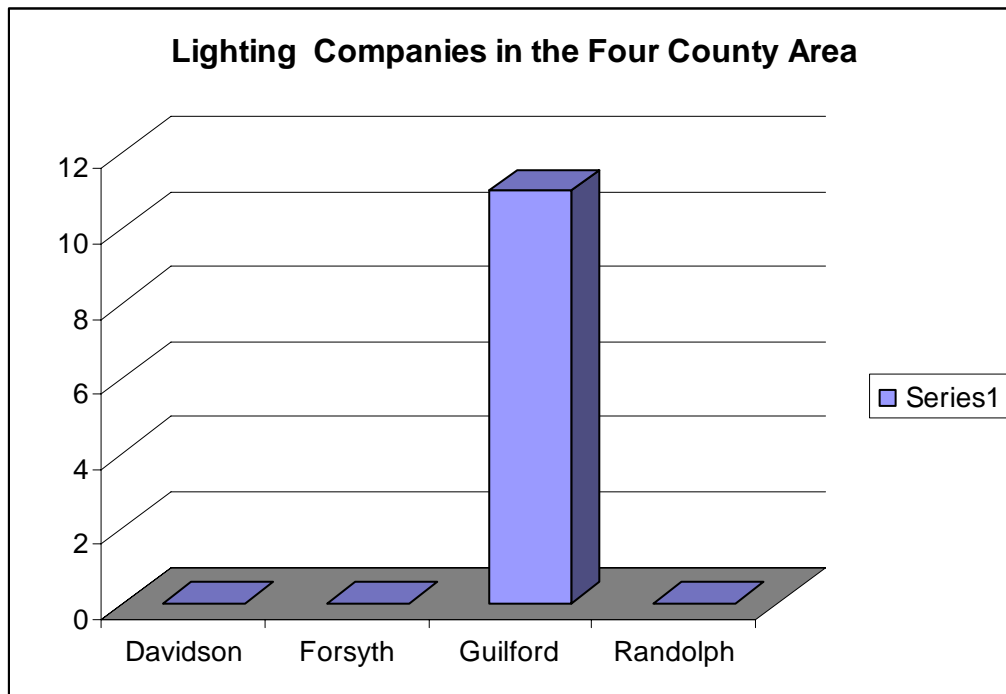
Employees 85	Sales under \$5 Million
Percentage of Furniture-Related Business	100%
Business Decreasing	10%

Lighting Companies

Codes: NAICS 42361021 for *Electric Equip & Wiring Merchants* and 33512105 for *Residential Electric Lighting Fixture Mfg.*

The lighting industry is quite small in the four county area. We found only twelve establishments in Guilford County and few or none in the surrounding counties. The bulk of these companies (eight) were found in High Point. Companies like *Kinder-Harris* and other smaller manufacturers of lights and lighting concepts were polled and an average 15 % of total indicated that they did business with the furniture industry.

Figure 2-20

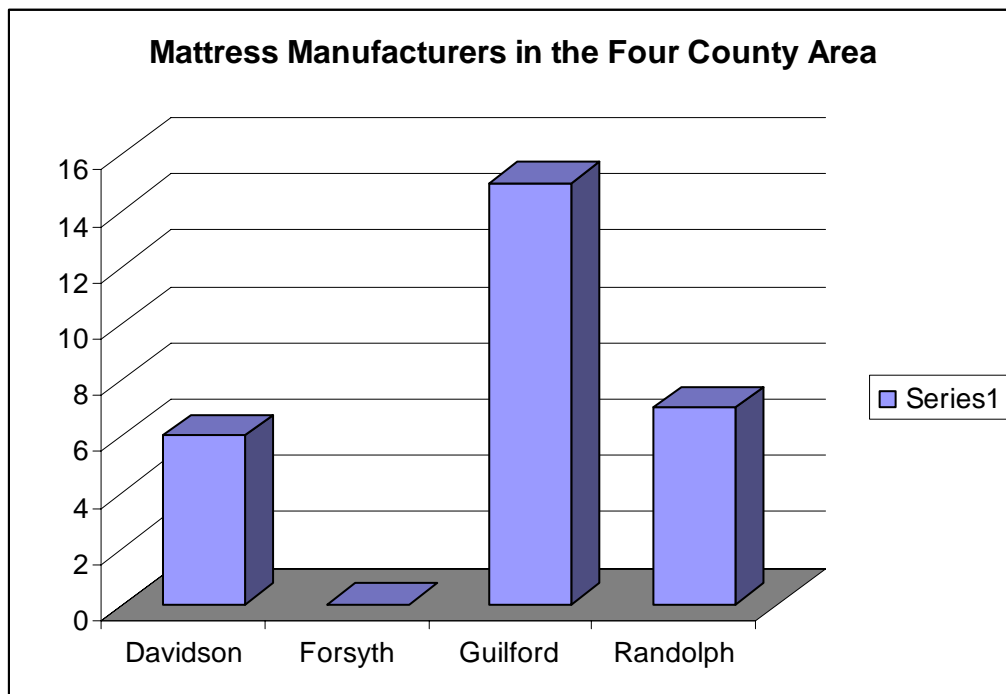


Mattress Companies

Codes: NAICS code 33791008 for *Mattress Manufacture*.

Mattress manufacturing is an industry very closely related to the furniture industry. Many retail furniture outlets sell mattresses and other bedding accessories. The four county areas have several bedding manufacturers. A majority of this manufacturing base is in Guilford County. Companies such as Leggett & Platt in High Point, High Point Bedding in Archdale and Spring Air in Greensboro make up these company groups.

Figure 2-21

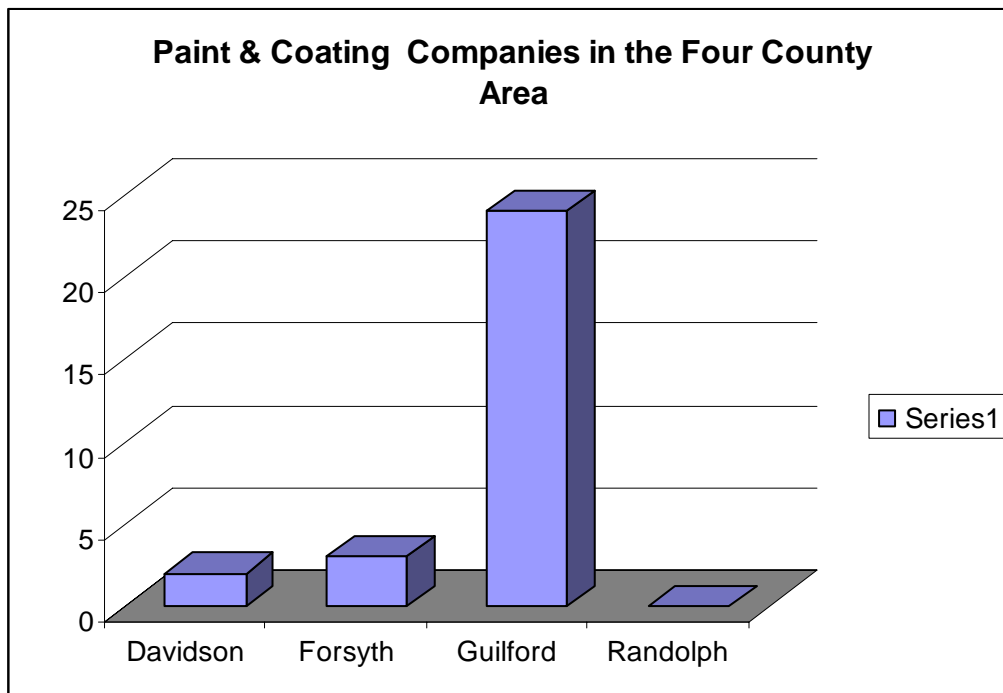


Paint and Coatings Companies

Codes: NAICS 33281203 *Metal Coating & Nonprecious Engraving* and NAICS 32551011 *Paint & Coating Mfg.*

Another support business for the furniture industry would be the “paint and coating” industry. We found several businesses in the area that fall into this group and the companies include industries that supply protective coatings, lacquers and finishes. Companies such as *Protective Coating Sales* and *Valspar* responded to our queries and do business with the furniture industry. As in other industries that we considered, the paints and coatings companies are concentrated in Guilford County and in the local area.

Figure 2-22

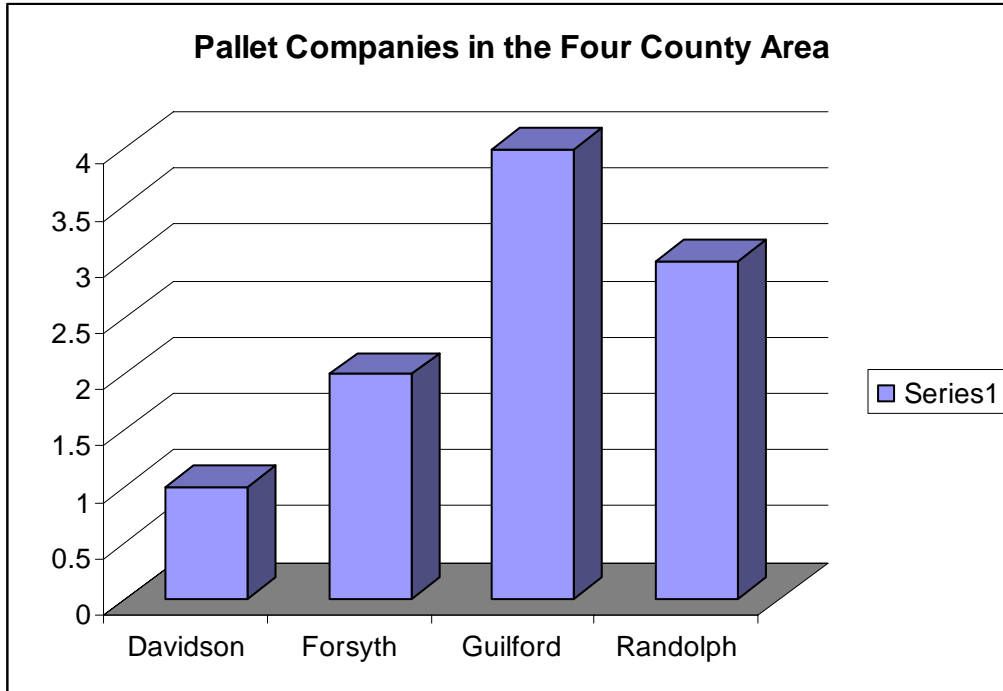


- *“This year’s market business has been soft although our overall furniture-related business has been increasing.”*

Employees 9	Sales under \$1 Million
Percentage of Furniture-Related Business	20%
Business Increasing	30%

Pallet Companies

Figure 2-23



Plywood & Veneers Companies

Codes: NAICS 32121103 *Hardwood Veneer & Plywood Mfg*, 32199929 *Miscellaneous Wood Prod Mfg* and 44419054 *Other Building Material Dealers*.

This is another industry that has a strong tie to the furniture industry and respondents polled claimed an average of 62% for furniture-related business in Guilford County and an average 75% of furniture-related business in Davidson County. Companies such as *Cramer Wood Products* and *Ritch Face Veneer* in High Point, as well as *Quality Veneer* in Liberty, are just a few of the listings for the veneer industry in this area. For this industry we developed a second chart that indicates cities since the predominant number of companies listed in Veneer and Plywood are in Guilford County, with the majority located in the High Point area.

Figure 2-24

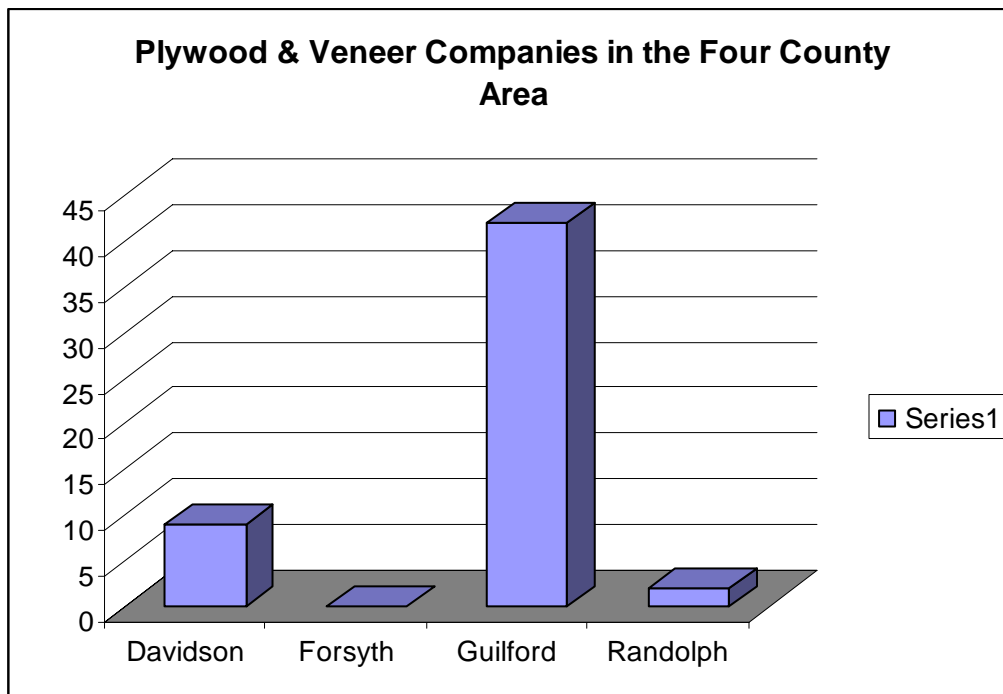
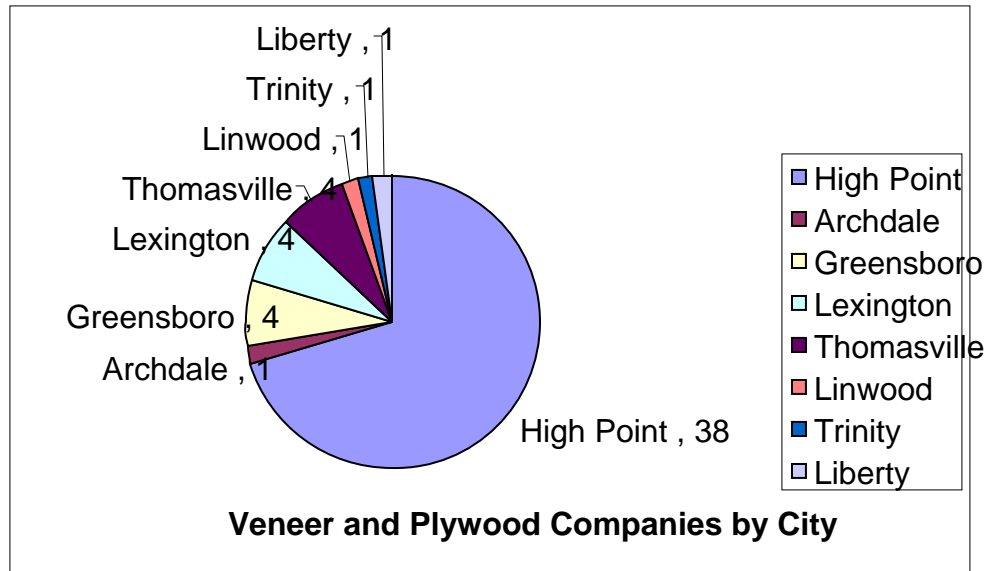


Figure 2-25



- *“For whatever reason, corporations don’t feel we are competitive enough and they are moving their business to China. It means a lot of job loss in our area.”*

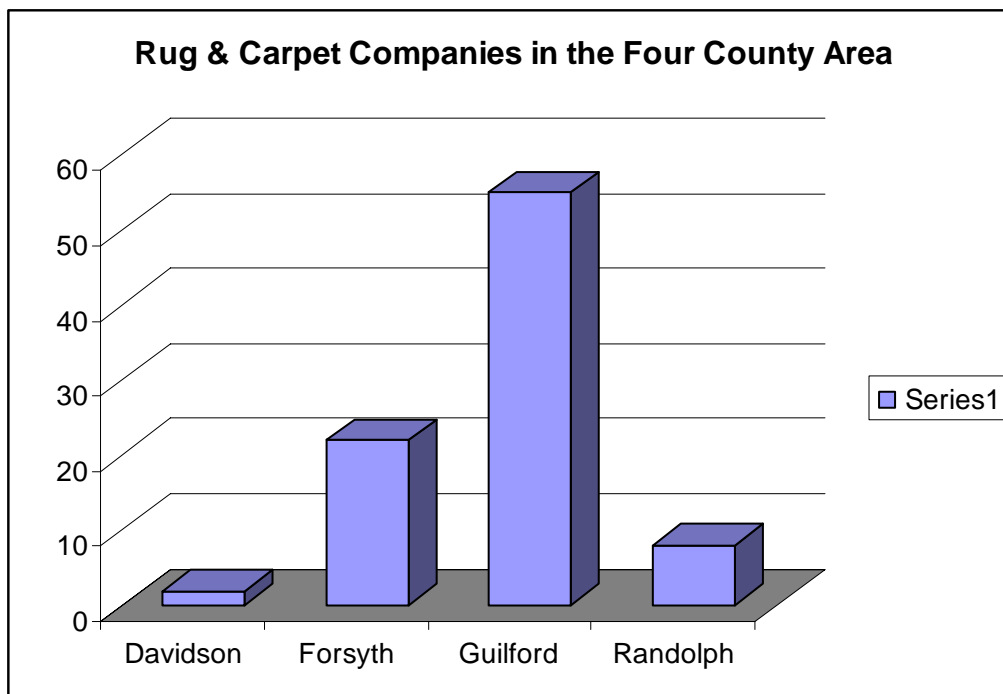
Employees	Sales
Percentage of Furniture-Related Business	75%
No Increase or Decrease	0%

Rug & Carpet Companies

Codes: 44221001 *Floor Covering Stores*

This is one of the more consumer oriented industries that we have covered. The NAICS code covers all types of establishments from Abu Rugs in Jamestown and Zaki in High Point to carpet stores such as Carpet One By Henry and the Carpet Super Mart in Greensboro.

Figure 2-26



Spring Wire

Codes: *Spring Manufacturers* (NAICS 33261201) and others such as *Steel Spring* (NAICS 33261102).

Spring Wire is another area that is narrowly focused on the furniture and bedding industry. The most were found in Guilford County, where three of the five with whom we spoke indicated that 100 % of their business comes from the furniture industry.

Figure 2-27

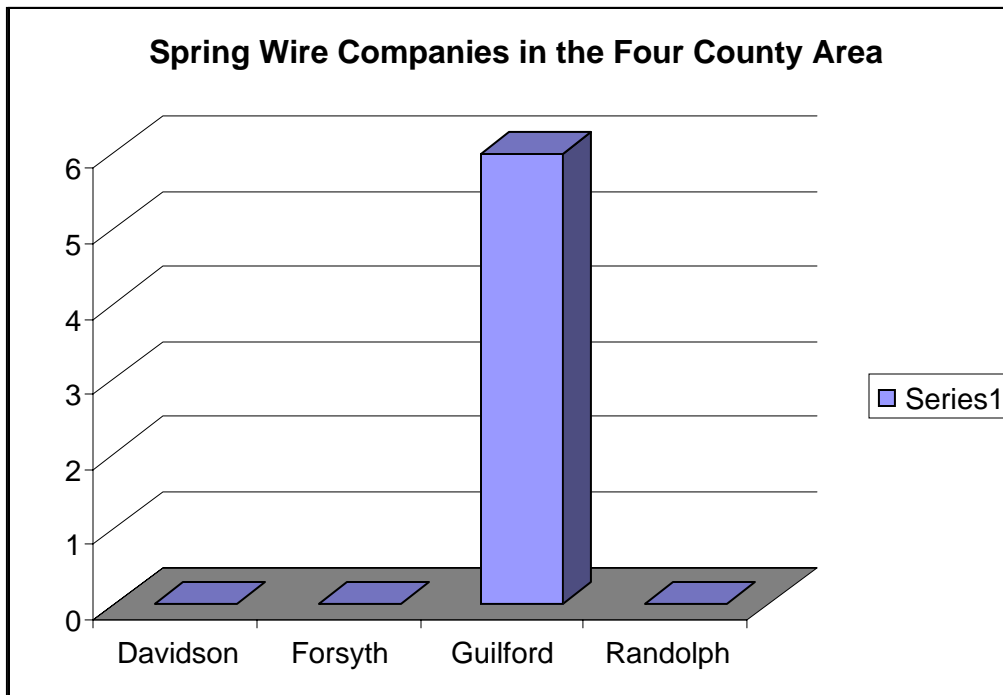
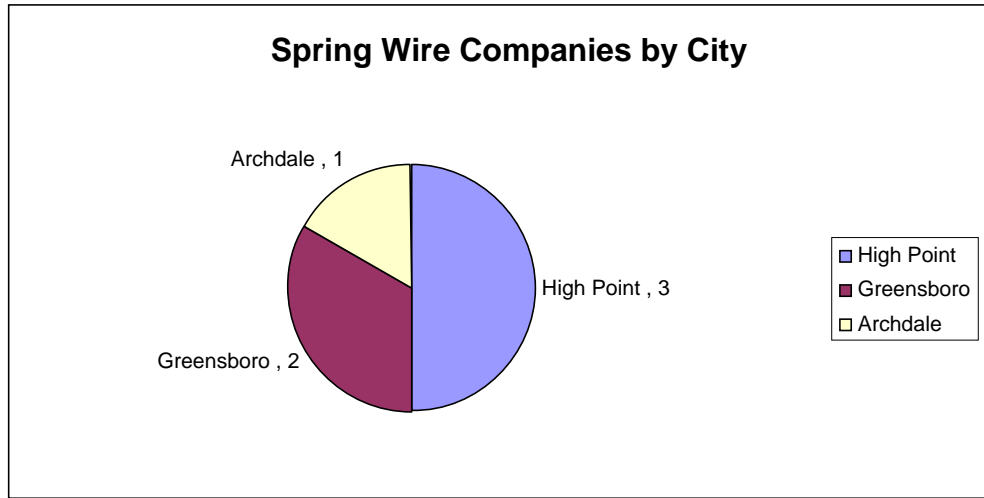


Figure 2-28

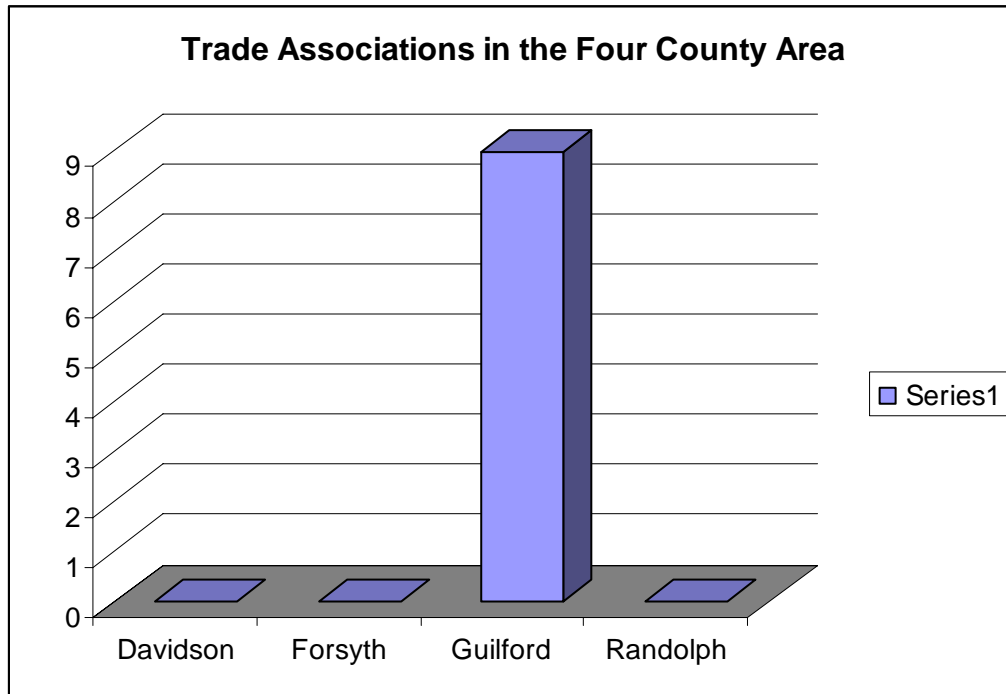


- *“People who had knowledge of the machines we use are hard to find.”*

Employees 35	Sales under \$5 Million
Percentage of Furniture-Related Business	100%
Business decreasing	11%

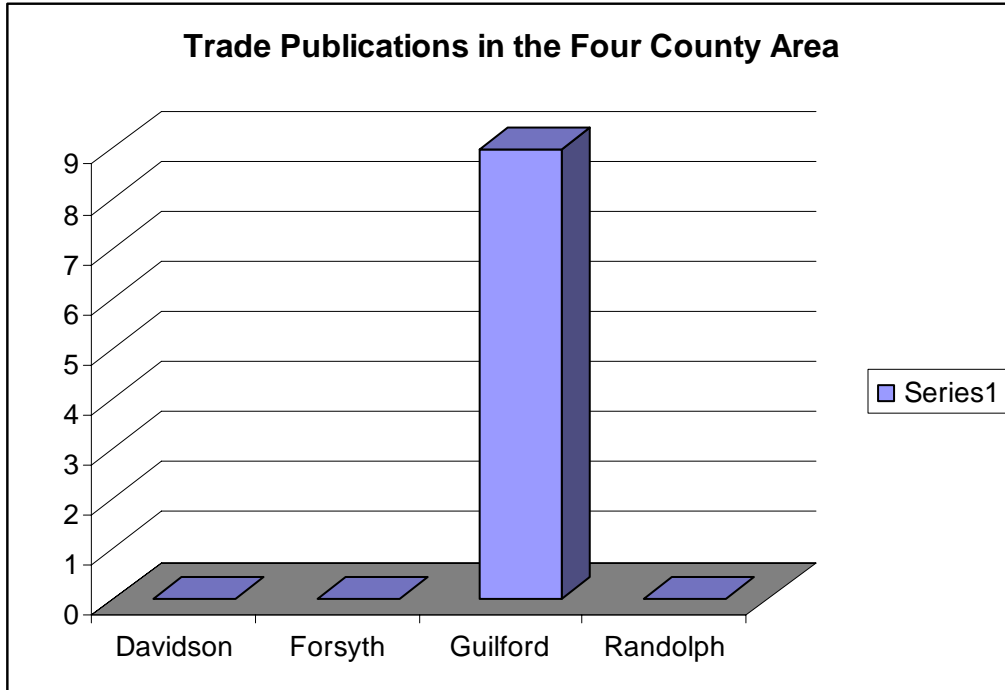
Trade Associations

Figure 2-29



Trade Publications

Figure 2-30

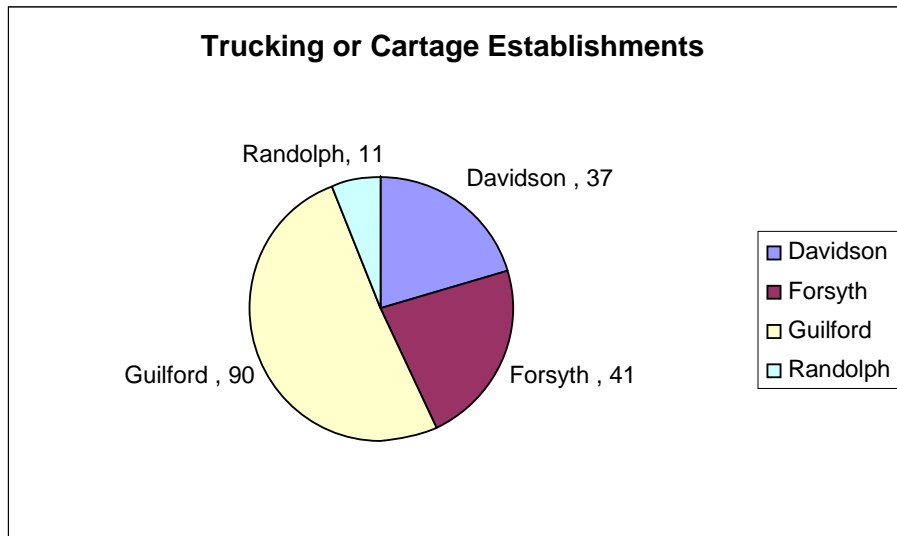


Trucking Companies

Codes: NAICS 48411016 *General Freight Trucking, Local* and NAICS 48423017 *Other Specialized Trucking, Long-Distance*.

This area includes long distance trucking, freight transport and specialized freight transportation. It takes little imagination to realize how many of these establishments there are in the four county areas. The chart shows that there are 90 firms alone in Guilford County. Many well-known and large companies are involved in the transport of furniture and report furniture related services. Companies such as *Caldwell* in Thomasville and *MGM* in High Point report large percentages of their businesses to be involved with the furniture industry.

Figure 2-31



- *“Business is good now!.”*

Employees 15	Sales under \$5 Million
Percentage of Furniture-Related Business	100%
Business Increasing	25%

- *“It is not slow right now.”*

Employees 16	Sales under \$5 Million
Percentage of Furniture-Related Business	90%
Business Increasing	70%

Upholstery Manufacturing

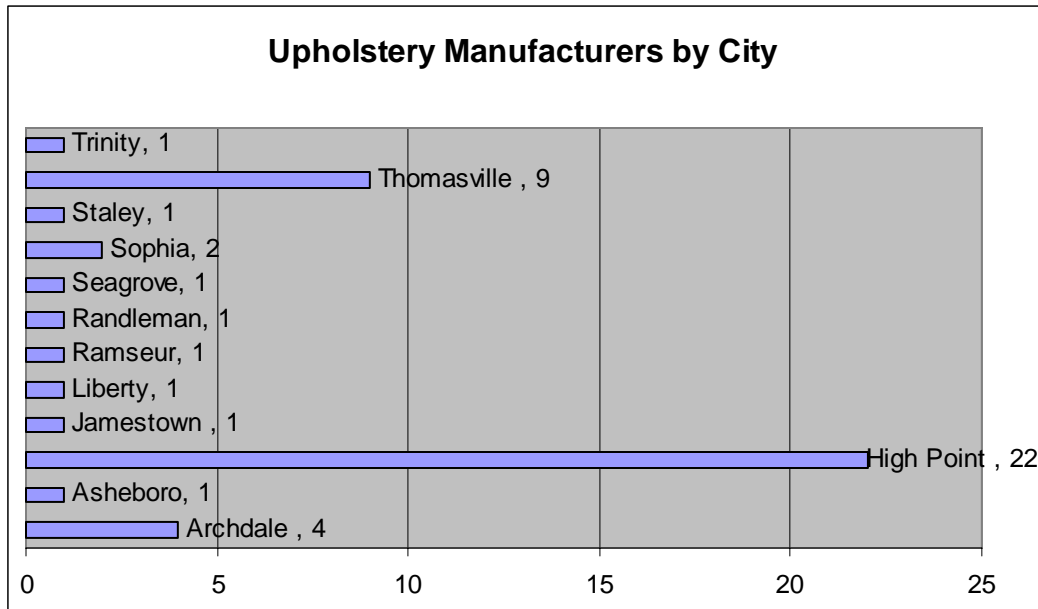
Codes: NAICS codes 33712709 for *Institutional Furniture Manufacturing* and 33712101 *Upholstered Household Furniture Manufacturing*.

This category includes the manufacture of upholstered and institutional furniture. Figure 2-32 illustrates the number of establishments and estimated level of employment as found in the four counties and includes many well known players in the furniture industry such as Klaussner Furniture Industries in Randolph County and the Pearson Company in High Point. This listing also includes some companies that do wood furniture and several corporate entities (without manufacturing) that are located in the area.

Figure 2-32



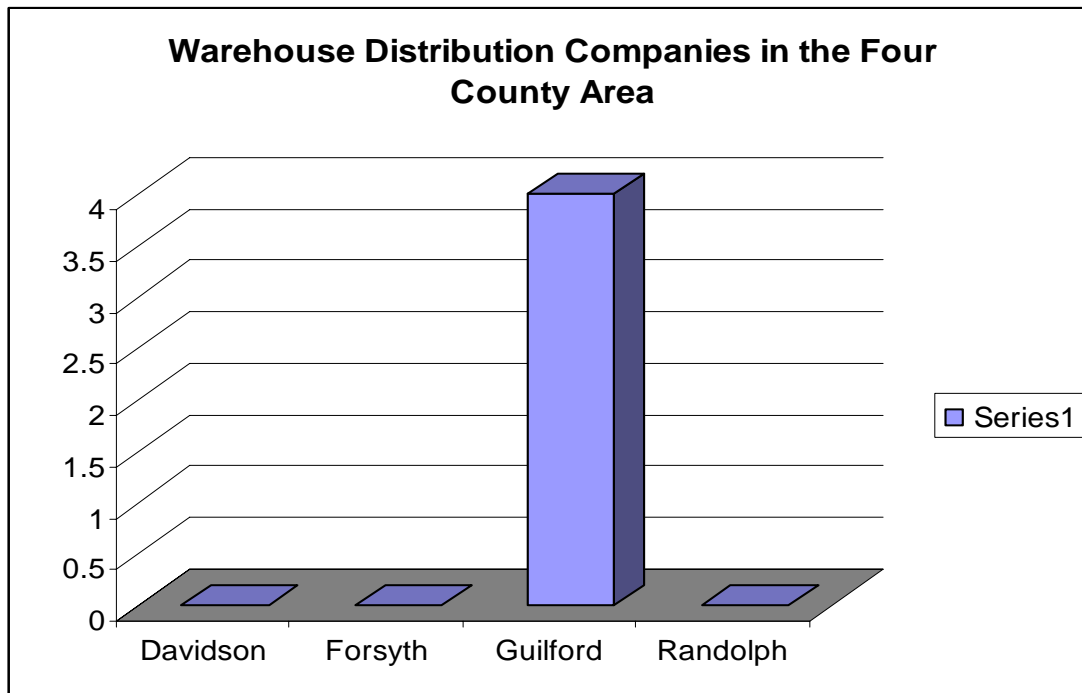
Figure 2-33



Warehouse Distribution Companies

Codes: NAICS 49311006 *General Warehousing & Storage* and 49319011 *Other Warehousing & Storage*. Searches using these NAICS codes also bring up many companies that do other non-industrial types of storage and warehousing.

Figure 2-34



Recommendations for Future Research

- When we contacted businesses we spoke to owners or managers using a very brief five-item questionnaire. A series of in-depth interviews with these and other managers would provide further insights into the past history and future potential of these supporting players in the Home Furnishings Industry.
- The diversity of businesses that support the Home Furnishings Industry certainly requires a diverse and skilled workforce. An in-depth profile of the workforce skills that exist in this industry would be of interest to present and future employers as well as other community leaders.

Appendix II-A: Questionnaire

Business Contact Form

Name of Business: _____

Telephone #: _____

Primary SIC Description: _____

Hello, my name is _____. I'm calling from High Point University concerning a research project we are working on for the furniture industry. Is there someone I can speak with who can give me an idea of the percentage of your business that is in any way related to the furniture industry?

If no one available:

Who should I speak with? _____

When should I call back? _____

If someone is available:

1. Approximately what percentage of your business is in some way related to the furniture industry?

2. Has your business related to the furniture industry been increasing or decreasing over the past three years?

Increasing _____ Decreasing _____

3. Approximately how large of a percentage increase or decrease? _____

4. Can you give us a lead on any businesses related to your own that we might have overlooked?

5. Would you like to add any comments relative to your business and the furniture industry?

Thank you for your time!

Appendix II-B: Supporting Businesses

The lists in this appendix were compiled using the InfoUSA database, a proprietary database of business and residential phone numbers that has been used by well known web services such as Yahoo! and Microsoft for many years to generate information about companies and residents for their web search engines. Since 1992 it has been a source of business information for libraries throughout the United States. The library version of the InfoUSA[®] product is called ReferenceUSA[®] and the business information is culled from business white and yellow pages and is verified by telephone. Coupled with data from the census and organized by codes (NAICS, SIC and Yellow Page Headings) the ReferenceUSA[®] database is an excellent source for information on companies or companies within geographic regions. Companies will appear on this list more than one time if they have multiple business locations.

Commercial Photography – page 85
Commercial Printing – page 87
Corrugated Boxes and Packaging - page 91
Fabric and Thread Mills – page 92
Foam Producers – page 93
Furniture Designers – page 94
Furniture Factoring – page 95
Furniture Manufacturing – page 96
Furniture Retailers – page 100
Furniture Show Rooms – High Point – page 104
Glass and Mirror Companies- page 109
Hardware Companies – page 110
Lighting Companies – page 111
Mattress Companies – page 112
Paint and Coatings Companies – page 113
Pallet Companies – page 114
Plywood and Veneers Companies – page 115
Rug and Carpet Companies – page 116
Spring Wire Companies – page 118
Trade Associations – page 119
Trade Publications – page 120
Trucking Companies – page 121
Upholstery Manufacturers – page 124
Warehouse Distribution Companies - 125

Commercial Photographers	106 Employers	715 Employees
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Davidson County: 3 employers

Total Employees 11

Greenlee Photography
Kathy Fritts Photography

Mike Bruton Photography

Forsyth County: 24 employers

Total Employees 66

Aerial Photography Experts
Bernard Carpenter Photography
Black Horse Studio
Blackburn Photography
Bo's Photography
Calhoun Photography
Cherry Hill Photo
David Reavis Photography
Donnan Photography
Impact Photographic Group Inc
Jackson Smith Photography
Lechleider Photography

Aycock G Allen Photographer
Lloyd Aaron Photography Inc
M Lane Photography
Mc Nabb Studio Inc
New Life Media
Photography By Carole
Portraits By Deborah
Sink's Photography
Snyder Photography Inc
Superiour Photographics
Trivette Studio
Walsh Photography

Guilford County: 73 employers

Total Employees 624

A Printer's Film Svc Inc
AJSI Enterprises Inc
Albion Associates Inc
Alderman Studios
Angela KERR Photography
Atlantic Photographics Inc
Austin Photography & Digital
Bill KUND Photography
Bill Lusk Photography
Boumarr Studios Inc
Brown Photography
Cavin & Stovall Photography
Charles Graham Photography
Clay Russell Photography
Creative Photography
Crestar Visual Technologies
Custom Creations
D Cube
Dan Routh Photography
Darrell Howard Inc
David Alford Photography

Dean Studio
Fabio Camara Photography
Flash Light
Howard Gaither Photography
Innovation Imaging Inc
J Knight Photography
Joe Comick Photography
John Barnes Photography
John Mixon Photography
John Russell Photography
Kathy Dollyhigh Photography
Kenton Robertson Photography
Koch Studio Inc
Kreber Enterprises
Leapfrog Inc
LESMED.COM
Lifetouch
Loflin Group
M P Photography
Mark Wagoner Productions
Melissa Whitmire LPGA Class

Michael Johnson Photography
Morse Associates
Opus Photographic
Photo Biz LLC
Photo Now
Photography A Work Of Art
PMA Studios
Ponzoni Photographic Inc
Prisjim Photo & Video Prdctn
Raeford Photo & Video
RHPII Inc
School Pictures Inc
Shutter Pix
Square One Creative
Stephen E Cirba Photography
Steve Cash Photography

Studio 323
Photo Biz LLC
Photo Now
Photography A Work Of Art
PMA Studios
Ponzoni Photographic Inc
Studio Place Inc
Tatum Toomey Whicker Inc
Touch A Life Photography
TTW Photo
Viewpoint Studios
Visual Concepts
VPS-Vintage Photo Studios
Widner Photo Inc
William Jarrett Photography

Randolph County: 6 employers

Total Employees 14

Doug Shiflet Photography
Dreamcatcher Photography
Furniture Illustrators Inc

Gary Hinshaw Photography
Jim Dillinger Photography
Villa Photography Inc

Commercial Printing	293 Employers	5400 Employees
----------------------------	----------------------	-----------------------

Davidson County: 28 employers

Total Employees 502

- | | |
|-------------------------------|---------------------------|
| Ad-Mugs | Lingo Promotions |
| B & C Custom Graphics | Mast Specialty Sales |
| Baker Printing Co | Paramount Printers |
| Banners & Such | Parks Printing |
| Carolina Envelope & Printing | Premier Printing Co Inc |
| Cousin's Advertising Inc | Print Creations |
| Davidson Printing | Printcraft Co |
| Denton Orator | Promotional Creations Inc |
| Dispatch | R U Trucking Inc |
| Dorsett Printing Corp | Riverwood Hall |
| Fairgrove Printing Co | Speed Printing |
| Green Printing & Packaging Co | Thomasville Times |
| Greystone Printing Svc | Wright Of Thomasville Inc |
| Instant Copies | Young Graphics Inc |

Forsyth County: 81 employers

Total Employees 1329

- | | |
|------------------------------|-------------------------------|
| Abbotts Creek Press | G & G Enterprises |
| Ablaze 21 Screen Printing | G T & A |
| Accelerated Copier Svc | Global Printing Solutions Inc |
| Accent Screen Printing | Gods Anointed Printing |
| Ad Color Inc | Goslen Printing Co |
| Ad Source Inc | Gwyn's Fashions |
| After Hours Printing | Hands On Screen Printing |
| Alpha Commercial Printing Co | Harco Printing Inc |
| Alpha Graphics | Hutchison Allgood Co |
| American Screenprinting | Ideal Printing Svc |
| American Speedy Printing Ctr | IKON Office Solutions Inc |
| Americraft Carton Inc | Images & Words Inc |
| Apparel Imaging | Ink Well |
| Associated Posters Inc | International Minute Press |
| BBF Printing Solutions | INX International Ink Co |
| Blaire Enterprises | J & J Industries Inc |
| Burklee Printing Co | J & R Printers |
| Campus Colors | Jostens |
| Carolina Hats | Keiger Printing Co |
| Castle Shirt Co | Kernersville Connection |
| Check Printers Inc | Label Printing Systems |
| Club Forms | L-E Inc |
| Commercial Printing Svc | Le Print Express |
| Creative 24 Hour Designs | Lowes Food Print Shop |

M & S Systems Inc
 M J Custom Printing & Graphics
 Marque Marketing
 Newsouth Printing Svc
 Office Max
 Olympic Packaging Corp
 Page's Sports Screenprinting
 Phoenix Outstanding Svc
 PIP Printing
 Plymouth Printing Co Inc
 Printing & Billing Of Carolina
 Printing Partners Inc
 Pura Vida Promotions LLC
 Quality Foil Stamping
 Rainbow Print & Copy
 Salem Printing Co Inc
 Screen Scene

Sharper Concepts
 Sharpe's Printing Svc
 Sir Speedy
 SJS & Co
 Snug Harbor Specialties Inc
 Sun Printing Co
 Triad Business Forms
 Triad Printing Inc
 Triangle Printing Co
 Universal Services Inc
 WAB Enterprises Inc
 Watermark Printery
 Winston Graphics
 Winston Printing Co
 Workflow One
 Xpresscreen

Guilford County: 155 employers

Total Employees 3331

A Bolder Image
 ABS Printing
 Action Packaging Systems
 Action Printing Ctr
 Ad Plex Web Printing
 Ad-Press Printing
 Adventures In Advertising
 ALACAM
 All Star Copying & Printing
 Alpine Graphic Apparel
 ALPZ
 American Printing Co
 Angeldog Graphics
 Archdale Printing Co
 Arrowhead Graphics Inc
 Art For Christ Inc
 Artistic Designs
 ASB Graphics
 Auto Mart Magazine
 Avery Dennison Corp
 B & K Fly Gear
 B & K Fly Gear
 Bag-It Inc
 Banknote Corp Of America Inc
 Battleground Printing
 BBF

Blind Faith Ent
 Buchanan Printing & Graphics
 Budget Printing Ctr
 Buffalo Design Cstm Scrnprntng
 Bulldog Printing
 Business Cards Of Greensboro
 B-Wear Screen Printing
 C & B Graphics Inc
 Camera Graphics
 Carol's Print Shop
 Central Printing Co Inc
 Champion Envelope & Printing
 Cheap Copies
 Chris T's
 Clinton Press Inc
 Coleman Resources
 Collie's Embroidery & Scrn Ptg
 Cooper-Thomas Benton
 Copy King Printing
 Corn, Karen
 Cornerstone Graphics
 Cranford Silk Screen Process
 Crown Printing Co
 Custom Business Forms
 Custom Made Inc
 D C Specialties Inc

D T Press
Deal Printing Co
Dean Studio
Deep River Printing
Deluxe Check Printing
Diamond Printing LTD
Digi-Sew Embroidery
Digital High Point
Digital Progressions Inc
DMS Printing Co
Douglas Printing Co Inc
Dove Communications
Eagle Products Screen Printing
Edwards Printing Co Inc
Electronic Data Magnetics Inc
Embroid Me
Eternitees
Fackrell Print Shop
Fed Ex Kinko's Ofc & Print Ctr
Fine Print
Franklin's Printing
Fusion Imaging Technology
Genuity Concepts
Gibbs Printing Inc
Global Docugraphix Inc
Graphic Printing Svc
GSO Printing/KWIK KOPY
Harold D Cox Assoc
HBD Screenprints
Hickory Printing Group
High Point Enterprise
Hodgin Printing Co
Image Connections
Image Works Inc
Inter Print Inc
International Minute Press
International Minute Press
J C Mfg Inc
Jazzy Designs Graphics
Joe Hall Advertising
Johnson Printing & Publishing
Kayrod Printing
Kayrod Tag & Label
Keiger Printing Co
Keystone Screen Printing Inc
Knightsbridge Inc

KWIK KOPY Printing
M B Marketing
M Press Inc
M Press Inc
Mar-Tek Industries
Micaron Screen Printing
Mid-Atlantic Printers LTDMirror
Graphics Inc
Motorsports Designs Inc
Multi-Print Inc
Nazdar North Carolina
NCP Solutions
News & Record
News & Record Interactive
Omni Printing Co
One Source Documents Sltns Inc
PBM Graphics Inc
Peacemaker Printing Co
Piedmont Printing Graphics Inc
Personally Yours
Pharmagraphics
Pharmalabel
Piedmont Graphics Inc
Piedmont Reprographics Inc
PIP Printing
PIP Printing
Posterprints
Pre Media Group
Premire Graphics Inc
Press LLC
Print Group
Print Management Assoc
Print Professionals
Printery
Printing Place
Printing Services-Greensboro
Quality Printing
Que Pasa Newspaper
Randall Printing
Red's Screen Printing
RJT Enterprises
Screen Waves
Seritec Inc
Show Tags
Sign-A-Rama
Signature Embroidery & Screen

Signs By Tomorrow
Silver Run Printing
Sir Speedy
Sir Speedy
Soabar Co Graphics Div
Soft Stitch Screen Printing

Southern Engraving Co
Sprint Print
Stitch Fx
Teco Printing Co
Thompson Creative Inc

Randolph County: 29 employers

Total Employees 238

American Graphics
Asheboro Printing Co
Business Cards Plus
Carolina Printing Svc
Courier-Tribune
Designs Unlimited
Durham Printing Co
Fast Print
Hunsucker Printing Co
Ink 'n Stitches
Lee Printing Co
Liberty Printing
Line Drive Graphics
M & S Printing
News & Record

On Target Printing
Pack & Ship Plus
Phillips Business Forms
Piedmont Advertising
Piedmont Printing Co
Pierce Advertising & Printing
PIP Printing
Randolph Guide
Randolph Guide Newspaper
Randolph Printing
TNO
Top Dog Embroidery Specialties
Trogdon Printing Co
Village Printing Co

Corrugated Boxes & Packaging	56 Employers	2709 Employees
---	---------------------	-----------------------

Davidson County: 9 employers **Total employees 152**

Beverage Suppliers Inc	PTI
Packaging Corp Of America	Smurfit-Stone Container Corp
Packaging Products Inc	Summerlin Enterprises
Piedmont Cases Inc	Superior Fiber of NC
Pregis	

Forsyth County: 9 employers **Total employees 653**

Alliance Rock-Tenn	Phoenix Packaging Inc
Archer Box Co	Smurfit-Stone Container Corp
Caraustar Industrial & Cnsmr	Vaughn Associates
Mc Ginnis Lumber	Welsh Paper
Packers Moving Supplies	

Guilford County: 33 employers **Total employees 1521**

Avery Dennison Corp	Lin Pac Corrugated Inc
Avery Dennison Corp	Montgomery Box Corp
B & B Packaging-The Carolina's	Package Crafters Inc
Box Board Products Inc	Packaging Service Solutions
Bunzl Distribution Inc	Pactiv Corp
Cannon-West Assoc Inc	Paper Express
Carolina Container Co	Paxar Corp
Carolina Fibre Corp	Piedmont Packaging Inc
Creative Packaging Solutions	Poly Supply Co
Fiber Cushioning Inc	Preferred Packaging Inc
Greensboro Box Co Inc	Quality Packaging Corp
High Point Fibers Inc	R & H Packaging
Highland Containers Inc	Smurfit-Stone Container Corp
IPS Packaging Inc	Smurfit-Stone Container Corp
J F Sales & Distribution	Thomasville Dixel Inc
JLZ Marketing Inc	Universal Packaging Inc
Kirkpatrick Packaging	

Randolph County: 5 employers **Total employees 383**

3-D PACKAGING LLC	Georgia-Pacific Corp
Caraustar Custom Packaging	Packaging Corp Of America
Southcorr Packaging	

Fabric and Thread Mills	45 Employers	4332 Employees
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Davidson County: 2 employers *Total employees* **793**

Parkdale Mills Superior Fiber Of NC

Forsyth County: 4 employers *Total employees* **276**

American Webbing & Fittings Label It Inc
Carolina Narrow Fabric Lantal Textiles Inc

Guilford County: 34 employers *Total employees* **2102**

Ashley Industries Avery Dennison Corp Avery Dennison Corp BGF Industries Inc Chambers Fabrics Inc Cone Denim LLC Covington Upholstery Fabrics Craftex Mills Inc Of PA Culp Inc Culp Ticking Data Print Graphics Drum Filter Media Inc Fiber Cushioning Inc. Galey & Lord Industries Inc General Elastic Company Hendrix batting Co Inc High Point Fibers Inc.	Hornwood Inc International Textile Market Kayrod Printing Kilop USA Inc New Generation Yarns North Star Specialty Products Oakdale Cotton Mills One Source Documents Sltns Inc Pittsfield Weaving Co R-Pac International Corp Thomasville Dixel Inc. Tk Holdings Tri-Tex Inc Unifi Inc U S Label Corp Vita Nonwovens Inc. York Label
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Randolph County: 5 employers *Total employees* **1161**

Asheboro Elastics Corp Ramtex Inc Roselon Industries Of NC Inc	Sapona Manufacturing Co. Universal Fibers
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Foam Producers	13 Employers	629 Employees
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Davidson County: 3 employers

Total employees 75

Foam-Tech Inc
Hilliard Fabricators

Value Ticking

Forsyth County: 1 employer

Total employees 10

Unisource

Guilford County: 9 employers

Total employees 544

Barnhardt Manufacturing Co
Bodet & Horst Usalp
Guilford Fabricators Inc
Hendrix Batting Co Inc
Hickory Springs Mfg Co

Lambeth Products
Linda Foam & Fabrics
Triad-Fabco Inc
Vita Foam

Furniture Designers	61 Employers	252 Employees
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Forsyth County: 4 Employers

Total employees 12

Douglas Abbott Furniture
Natura Design Inc

Pinehurst Home Furnishings
Willow Creek & Co

Guilford County: 56 Employers

Total employees 236

American Signature Design
Arthur Brehl Worldwide
Artios Inc
Atlantic Craftsman
Baronet Inc
Beck & Beck Design Assocs
Brandau Design Studio Inc
Brian Palmer Design Consnt
Bruce Hirschhaut Designs
Carol Wheelless Furniture Dsgns
Catina Unlimited Design
Chandler Brown & Assoc
Charles Harris Designs
Chris Hankins Designs
Darrell Shaw Designs
DRS Resourcing & Design
Eggleston Concepts
Eggleston Concepts LTD
Fine Furniture Design & Mktg
Fine Woodwork-Don Tredinnick
Furniture Design Assoc LLC
G Michael Black Design Inc
Glen Morgan Upholstery
Designs
Goodson & West Designs, Inc.
Gregory Scott & Asssos, LLC
H Thomas Keller & Assoc
Haywood L West Designs
Hilco Woudstra Designs

Innovations, Inc.
Interior Classics, Inc.
J. Black Design
John Stafford Designs
Kaiser Associates Inc
Ken Collins Woodworking Studio
Lamination Services
M H Design Inc
Maker Of Things
Maria Yee Inc
Norman Hekler Design Inc
Olive Design
Otto & Moore Furniture
Pride Sasser Home Furnishings
Ransom Design Co
RCR Development Corp
Richard G Brown Furniture
Rockford Furniture
Schadt Woodcarving & Design
South Cone Trading
Stefaniw Wood Works
Stookey Greta Designs
TJS Woodworks
Van Aulbert Designs
W Schillig Inc
Wagner Woodworking
Willis Designs
Zimmerman Design Collaborative

Randolph County: 1 Employer

Total employees 4

Woodfern Woodworks

Furniture Factoring	4 Employers	61 Employees
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Guilford County: 4 employers

Total employees 61

Associated Funding & Factors
 B B & T Commercial Finance

Joseph Dean Co
 U S Funding Inc

Furniture Manufacturing**274 Employers*****Davidson County: 40 employers***

Artist Colony	Master Design Furniture
Bits & Pieces	Masterwrap Inc
Carter Furniture Of Salisbury	Oakridge Manufacturing Inc
Classics	Old North State Furniture
Con-Tab Inc	Payne Creek
Cotton & Clark	Piedmont Turning & Woodworking
Councill Craftsmen	Relax Manufacturing Co
Directional Inc	Riverwood Casual Inc
Freeman & Co Furniture-Needle	Royal Colony Furniture
Garrison Strategies	Southern Traditions
Hampton Mfr Inc	Springhill Co
Hedrick Of Thomasville Inc	Stanley Furniture Co
Highsmith Furniture Inc	Stanley Furniture Co
Hunter's Woodcraft	Stone International Inc
Images Of America Inc	Superior Wood Products Inc
K & S Furniture Restorations	Thomas Roderick Co
Koonts Manufacturing	Thomasville Furniture Ind Inc
Leggett & Platt Inc	Tomlinson Erwin Lambeth
Lexington Home Brands	Whitewood Industries
Marquis Contract Corp	Younger Furniture Inc

Forsyth County: 7 employers

Beaufurn	North Davidson Furniture Co
Brady Furniture Co	Omega Equipment LLC
De Curtis Trading Co	Retail Systems Inc
Moyer Diebel Co	

Guilford County: 227 employers

Adams-Pierce Furniture Inc	Artisans Guild Inc Furn Mgrs
Affiliated Importers LTD	Ashley Manor
AGI Industries Inc	B-Safe Co
Alan White Co	Baker Manufacturing Co Inc
American Furniture Mfg	Barcalounger Co
American Impressions Inc	Basic Furniture Styles Inc
American Of High Point Inc	Bassett Mirror Co
Archdale Furniture Distr	Bau Furniture Mfg
Ardley Hall	Bernhardt Furniture Co
Arthur Brett Furniture Inc	Bevan Funnell LTD

Bevan Funnell LTD
 Blakeline Furniture
 Braxton Culler Inc
 Brazil Furniture Group
 Brianza Furniture Intl
 Bristol House
 Brooks Furniture Mfg Inc
 Brothers Furniture
 Bruards Furniture Co
 Burrough Furniture
 CCF
 Central Station Original
 Chair City Upholstery
 Chapman Co
 Charleston Forge Inc
 Chateau D' USA
 Chateau Merisier
 Chelsea House
 CHF Inc
 Classic Corp
 Classic Gallery Inc
 Classics By Casa Bique Inc
 Claude Gable Co
 Claude Gable Co
 Comitia Molina
 Components South
 Conover Chair
 Continental Brass
 Country Elegance Furniture
 Craftmaster Furn Corp
 Cramco Inc
 Crawford Furniture Mfg Corp
 Curran Upholstered Furniture
 Custom Design Crafters
 Custon Furniture Transport
 D & S Mfg LLC
 D L & S Industries Inc
 Design Horizons
 Design Institute America
 Dew Enterprises
 Dicey Mills
 Dinaire LLC
 Directional Inc
 Distinction Furniture Corp
 Doimo Elite
 Dowdy/Gillispie Sales Inc
 Durham Furniture Inc
 East Wind Designs Inc
 Edward Ferrell LTD
 Elements By Grapevine
 Exl Designs
 Fairfield Chair Co
 Ferguson Copeland LTD/Showroom
 Fine Art Lamps LTD
 Fine Furnishings Direct Inc
 Franklin Place
 French Heritage Reproduction
 Furniture Specialist
 Gamma Arredamenti Inc
 Garcia Imports Inc
 Giorgio Collections LTD
 Good Companies
 Habersham Plantation Showroom
 Hammary Furniture
 Hammer Collection
 Hancock & Moore Inc
 Happy Living Inc
 Harden Furniture Co
 Harden Manufacturing
 HDM Furniture Industries Inc
 Heirloom Furniture Inc
 Hekman Furniture Co
 Henredon Factory Outlet
 Henredon Furniture Industries
 Henredon Furniture Industries
 Hickory Chair Co
 Hickory White Showroom
 Hickory White Upholstery
 Higdon Furniture Co
 High Point Furniture Ind., Inc
 Highland House Furniture
 Hillcrest Manufacturing Inc
 Hooker Furniture Corp
 Hurtado USA Inc
 Ideaitalia Furniture
 Incanto USA
 Incap Furniture Inc
 Ingram Home Furnishings
 Jack Cartwright Inc
 Jeffco Furniture Showroom
 Jessica Charles Furniture
 Jordan Brown Co

Keller Mfg Co	Nichols & Stone Co
Kincaid Furniture Co	Niroflex Leather
Kindel Furniture Co	Norcross Agency Inc
King Hickory Furniture Co	Norwalk Furniture Corp
Kingsdown Inc	O'Henry House LTD
Klote International	O'Sullivan Ind Inc
Krivaja Beechbrook Corp	Oklahoma Furniture Co
L & J G Stickley Inc	Old Hickory Tannery
LA Barge Inc	Originals 22 Inc
LA-Z-Boy Furniture Galleries	Orleans Furniture Co
LA-Z-Boy Furniture Galleries	Patrician
Laine Upholstering Co	Pearson Co
Lancaster's Customworks	Pennsylvania House
Lane Furniture	Peoploungers
Lawrence Samuel Furniture Co	Peregrine Industries Inc
Lea Industries Inc	Peters-Revington Furn Mfg
Lee Industries	Phillips Collection
Legend Furniture	Phillips Collection
Ligna USA Inc	Precedent Furniture Inc
Lincoln-Gerard USA Inc	Pulaski Furniture Showroom
Loft Goods	Quality Sleepers
Lorts Manufacturing Inc	Racing Furniture
Lyn Hurst Designs Inc	Rapids Wholesale Direct
MAB LTD	Riverside Furniture Mfg Corp
Magnussen Home Furnishings	Romweber Co
Maitland Smith LA Barge	Rush Industries Inc
Maitland Smith LA Barge	S & C Enterprises Of Nc
Maitland Smith LA Barge Outlet	Salem Square Corp
Manchester Furniture Group	Schat Import Agencies
Mark David Inc	Schnadig Corp
Marshall-James Inc	Schnadig Corp
Massoud Furniture Mfr Co	Sedgewick Industries Inc
Masten Furniture Co	Shenandoah Furniture Inc
Master Design Inc	Shermag Inc
Matteograssi USA Inc	Sherrill Furniture
Mc Creary Modern Inc	Sides Custom Furniture
Michael Thomas Furniture Inc	Silver Furniture Co Inc
Minick Wood Products	Smith Agency
Mirror Fair/S Cavallo	Smith Furniture Manufacturing
Mitchell Gold's Co Showroom	South Sea Rattan & Wicker
Montis America Inc	Southfield Furniture Inc
Mottahedeh & Co	Southwood Furniture Corp
Natale Furniture Industries	Standard Furniture Mfg Co
National Furniture Mfg Co	Stanford Furniture Corp
Natuzzi Americas Inc	Stanley Furniture Co
Neil Allen Industries Inc	Statton Furn Mfg Co

Stylelife Furniture Inc
Sugar Creek
Sumter Cabinet Co
Swaim Inc Showroom
Swan Brass Bed
Table Creations
Thomas Parker Collections Inc
Tomlinson Erwin Lambeth
Triune Business Furniture Inc
TRS Furniture Inc
Ullmanique Inc
Uwharrie Chair Inc

Vanguard Furniture Co
Vaughan Furniture Co
Viewpoint Leatherworks Inc
WEBB Furniture Co
Weiman Co
William Alan Showroom
Woodmark Originals
Wright Table Co
Yorkshire House Inc
Yorkshire House Inc
Younger Furniture Inc

Furniture Retailers	253 Employers	3792 Employees
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Davidson County: 43 employers

Total Employees 401

Beefy's Furniture	Badcock Home Furnishings Ctr
Briggs & Briggs	Bargain Furniture
Char Lin Furniture	Buyer's Furniture Outlet
Market Place	Camo Furniture
Rex Furniture Co	Chair City Furniture Dist
Sandcastle Home Furnishings	Creative Bedding & Furniture
Thomasville Custom Connection	Discount Quality Furniture
Beeker Furniture	Freelance Staging Inc
Bob Timberlake Gallery	Furniture City Outlet
Coloton's Collection	Furniture City Outlet
Heritage Home Furnishings	Gordon's Furniture Disc Ctr
Kimbrell's Furniture	High Point Furniture Carriers
Lexington Furniture	Holton Fine Furniture
Lexington Home Brands Factory	John Thomas Furniture
Morgan's Inc	Lee Furniture Gallery
North Carolina Furniture	Lexington Home Brands
Roy's Enterprise Furniture	Magazine 2 Home Furniture
Smart Buy Furniture Dscnt Ctr	Oak-Wood Furniture Galleries
Trade Wind Treasures	Randall Tysinger Antiques
Transit Damaged Freight	Sandnetta Furniture Inc
Piedmont Furniture Ctr	Urban Classics
U S Furniture Market	

Forsyth County: 58 employers

Total Employees 451

3 D Furniture Outlet	Contempo Concepts
Ashley Furniture Home Furnishings	Cost Plus World Market
Ball Enterprise	Dunbar Furniture LLC
Bed Bug	Dynasty Furniture & Acces
Bombay Co	Expressions Home Decor
Bowen Town & Country Furniture	Family Furniture
Bowen Town & Country Furniture	Furnishings Inc
Clarity Furniture Network	Furniture & Etc
Clemmons Discount Sales	Furniture Barn Inc
Colfax Furniture	Furniture Mart
Colfax Furniture	Hanes Discount Furniture
Consignment Furniture	Havertys Furniture
Emporium	Hickory Tree Furniture
	Hicks Furniture
	Hilde's Interiors
	Hugh Z Ingram Inc

Idlewild House Inc
 IFB Bedding Outlet
 J & S Discount Furniture
 Jim Ebert Discount Furniture
 Ken-Lu Furniture
 Kiger's Furniture
 LA-Z-Boy Furniture Galleries
 Living Dimensions
 Mattress Furniture & More
 Modern Classic Furn & Design
 North Carolina Art & Antiques
 Old Clemmons School
 Pier 1 Imports
 Pottery Barn
 Red Door

Regan's Furniture Choices
 Reynolda Antique Gallery
 Rominger Southern Furniture Co
 Rustikland Furniture
 S & W Lighting Co
 Shamel Furniture Co
 Simon Horn Furniture LTD
 Simply Amish Furniture & More
 Triad Furniture Sales
 Triad Refinishing
 Two Brothers Furniture
 Ultimate Accents Inc
 Waughtown Furniture
 World Bazaar

Guilford County: 125 employers

Total Employees 2818

709 Interiors
 A Classic Design Furniture
 A Shade Different
 A T & L Furniture Shopping Svc
 Aarons Sales & Lease Ownership
 Adams Furniture USA
 American Accent Of High Point
 American Accents Furniture
 American Furniture Warehouse
 Ashley Furniture Hmfrnshngs
 Ashley Furniture Homestore
 Badcock Home Furnishings Ctr
 Badcock Home Furniture &
 More
 Bassett Furniture Direct
 Bedroom Essentials
 Benbow Reproductions Inc
 Bethany's Furniture
 Black's Furniture Co
 Boyles Distinctive Furniture
 Calligaris USA Inc
 Case & Cushion Home Furn
 Central Furniture Outlet
 Chateau D' USA
 Cherry Hill Furniture Carpet
 Colfax Furniture
 Colfax Furniture Store
 Consignment Furniture Empor.

Cost Plus World Market
 Cox Furniture & Appliance Co
 Cozy Corner Furniture
 Crystal Furniture Co
 Custom Creations By Marlowe
 Dave's Discount Furn Warehouse
 Decorator's Choice
 Decorator's Choice
 Design Central Interior
 Designer's Touch Furn & Fabric
 Discount Recliners Plus
 Distinctive Dwellings
 Drexel Heritage Furniture
 Executive Furniture Leasing
 Factory Direct
 Family Furniture
 Four Hands
 Furniture Avenue Partners LLC
 Furniture Clearing House
 Furniture Connection Inc
 FURNITUREANDLEATHER.COM
 Furnitureland Express
 Furnitureland South Inc
 Furnitureland South Inc
 FURNITUREPRODUCTS.COM
 Hampton Antiques
 Hau Furn Rental & Sale Inc
 Henredon Factory Outlet

Hickory Manor House
 High Point Furniture Sales Inc
 High Point Furniture Sales Inc
 Hinkle Furniture
 Home Style Furniture Gallery
 House Dressing
 Hunnington Furniture Industry
 Interior Resources & Designs
 Jennifer Convertibles
 K J's Furniture & Decorative
 Kagan's Furniture
 Kagan's Furniture Galleries
 Kagan's Furniture Galleries
 Keen Manor
 King's Chandelier Co
 Klaussner Furniture Industries
 Ladd Furniture
 LA-Z-Boy Showcase Gallery
 Leather & More
 Leatherland USA Inc
 Legacy Classic Furniture Inc
 Leggett & Platt Inc
 Maitland Smith LA Barge Outlet
 Marvin L Walker & Assoc
 Mattress Outlet
 Michael F Luther & Assoc
 Michael's Furniture
 Mike's Furniture Store
 Miller Furniture Co Inc
 Modern Upholstery Co
 MPL Furniture
 N C Furniture House
 National Furniture Mart
 Nc Furniture Buy Direct
 Nc Furniture Unlimited

North Carolina Furniture Drect
 Palatial Furniture Inc
 Pan American Furn & Design
 Pennsylvania House
 Pier 1 Imports
 Pier 1 Imports
 Pier 1 Imports
 Priba Furniture
 Randall Tysinger Antiques
 Red House Furniture
 Regan's Furniture Choices
 Regan's Market Samples Plus
 Resort Furnishings
 Robert Bergelin Co
 Rooms To Go Furniture
 Rose Furniture Co Inc
 Rose Furntiure Clearence
 Rosewood Room
 Rossetto Inc
 Rustikland Furniture
 Shaw Furniture Discount Ctr
 Simply Cottage Inc
 Sofa Express
 Southeastern Furniture Wrhse
 Southern Craftsman Furniture
 Southland Furniture
 Standard Furniture Mfg Co Inc
 Thomasville Furniture
 Thomasville Home Furnishings
 Triad Furniture Outlet Inc
 United Furniture Industries
 USA Baby & Child Space
 Utility Craft Inc
 Williams-Sonoma
 Yorkshire House Inc

Randolph County: 27 employers

Total Employees 122

Affordable Furniture
 Affordable Furniture Warehouse
 American Furniture Distrs
 Badcock Home Furn. & More
 Bob's Discount Mattress
 Custom Sofas By Keith
 Direct Sales
 E Street Furniture

East Coast Wrought Iron
 EST Furniture
 Factory Direct Furniture Inc
 Factory Direct Furniture Inc
 G & R Furniture Liquidators
 Hardin's Furniture Co
 Hyder Home Furnishing
 J L Furnishings East

Ken's Furniture & Candles
Kimbrell's Furniture
Klaussner Furniture Industries
Klaussner Furniture Outlet
Midway Discount Furniture
N C Furniture Connection

Piedmont Furniture Ind Inc
Soft Line
Su'Ann Inc
Triad Furniture
Victory Furniture & Appliances

Claude Gable Co	Elements By Grapevine
Coaster-Wrenncom Building	Emerson ETCIE Inc Showroom
Comfort Furniture Inc	English Rd Furn Emporium
Comitia Molina	Englishman's
Commerce & Design Building	Environment Furniture Inc
Company C Inc	Eric Brand Furniture
Components South	Exl Designs
Concordia Furniture Inc	Fairfield Chair Co
Concordia Furniture Inc	Farmhouse Furniture Inc
Conover Chair	Fefco Fine Furniture Inc
Continental Brass	Ferguson Copeland LTD/Showroom
Corsican Furn Inc	Fine Art Lamps LTD
Country Elegance Furniture	Fine Furnishings Direct Inc
Craftmaster Furn Corp	Flair Home Furnishings Inc
Cramco Inc	Flat Rock Furniture Inc
Crawford Furniture Mfg Corp	Flat Rock Furniture Inc
Creative Furniture Industries	Founders Furniture Co
Curran Upholstered Furniture	Fraenkel Furniture Inc
Custom Design Crafters	Franklin Place
Custon Furniture Transport	French Heritage Reproduction
CYM Furniture	Froelich Furniture Co
D & S Mfg LLC	Furniture 4U
D L & S Industries Inc	Furniture Brokers-North Crln
Davenport Home Furnishings	Furniture Classics
Dawson Furniture Co	Furniture Design By Choice
Decca Furniture USA	Furniture Displays Co
Decorator's Choice	Furniture Exports
Decor-Rest Furniture	Furniture First
Design Horizons	Furniture Plaza
Design Institute America	Furniture Shopping Directory
Dew Enterprises	Furniture Team
Dicey Mills	Furniture Values Intl
Dinaire LLC	Gamma Arredamenti Inc
Dinettes & More LLC	Garcia Imports Inc
Directional Inc	Georgian Lane
Distinction Furniture Corp	Giorgio Collections LTD
Doimo Elite	Giorgio Home Furnishings
Dowdy/Gillispie Sales Inc	Giuseppe Arcese Furniture
Durham Furniture Inc	Global Furniture
Dynasty Furniture Mfg LTD	Global Furniture USA
Dynasty Furniture Mfg LTD	Good Companies
Dynasty Furniture Mfg LTD	Gotico Furniture & Accents
E G Furniture	H & H Furniture
East Wind Designs Inc	H M Richards Inc
Eastwood Furniture	Habersham Plantation Showroom
Edgewood Furniture	Hamilton Square Inc

Hammer Collection	King Hickory Furniture Co
Hancock & Moore Inc	Klote International
Happy Living Inc	Krivaja Beechbrook Corp
Harden Furniture Co	LA Maison Kalanik Inc
Harden Manufacturing	Laine Upholstering Co
Heirloom Furniture Gallery	Laneventure Furniture
Hekman Furniture Co	Lawrence Samuel Furniture Co
Henredon Furniture Industries	LA-Z-Boy Furniture Galleries
Hickory Chair Co	LA-Z-Boy Furniture Galleries
Hickory White Showroom	Le Meuble Villageois Inc
Higdon Furniture Co	Legacy Classic Furniture Inc
Highland House Furniture	Legends Furniture Inc
Hillcraft Furniture Co	Leick Furniture Co Inc
Hillcrest Manufacturing Inc	Levone Kagan's Galleries
Holland House	Lexington Home Brands
Home Collection	Ligna USA Inc
Hooker Furniture Corp	Lincoln-Gerard USA Inc
Horizons International Accents	Link Wise Furniture Co LTD
HTL Furniture Inc	Linrene Furniture Inc
Hughes Furniture Industries	Liud Furniture
Hughes Furniture Industries	Loft Goods
Hughes Furniture Industries	Lorts Manufacturing Inc
Huntington Furniture Inds	Lyn Hurst Designs Inc
Hurtado USA Inc	MAB LTD
Ideaitalia Furniture	Madison House Furniture
In Furniture	Magnussen Home Furnishings Inc
Incanto USA	Magnussen/Presidential Furn
Incap Furniture Inc	Maitland Smith LA Barge
Ingram Home Furnishings	Manchester Furniture Group
Intercon Furniture LLC	March Furniture Inc
Interlude Home Inc	Mark David Inc
International Home Furnishings	Market Square
Italmond Furniture	Martin Furniture
Italmond Furniture	Massoud Furniture Mfr Co
J Royale Furniture Inc	Masten Furniture Co
Jeffco Furniture Showroom	Masten Furniture Co
John Kelly Furniture	Master Design Inc
John Thomas Furniture	Matteograssi USA Inc
Showroom	Max Home LLC
John Turano & Son Inc	Mc Creary Modern Inc
Johnston Casuals Furniture Inc	Mc Guire Furniture Showroom
Jordan Brown Co	Mc Neilly Champion Furniture
Karastan High Point Showroom	Mc Neilly Champion Furniture
Karya Furniture	Meadowbrook Furniture
Keller Mfg Co	Medallion Furniture Industries
Kindel Furniture Co	Michael Howard Furniture Co

Michael Thomas Furniture Inc
Minick Wood Products
Minson Enterprises/Pastel Furn
Minson Enterprises/Pastel Furn
Mirror Fair/S Cavallo
Mitchell Gold's Co Showroom
Modus Furniture Intl
Montis America Inc
Mottahedeh & Co
Murphy Furniture Mfg Co Inc
N C Casual Furniture
Najarian Furniture
Najarian Furniture
Najarian Furniture
Natale Furniture Industries
National Furniture Mfg Co
Natuzzi Americas Inc
Nc Bedroom Furniture Inc
NCFURNITUREFORYOU.COM
Nichols & Stone Co
Niroflex Leather
Norcross Agency Inc
Norwalk Furniture Corp
Nouveau Concept Furniture
Oklahoma Furniture Co
Old Hickory Tannery
Old Warhorses Properties LLC
Olde World Furniture Inc
Omnia Leather Furniture
Orient Express Furniture
Oriental Lacquer Furniture Inc
Originals 22 Inc
Orleans Furniture Co
O'Sullivan Ind Inc
Outlook Furn
Oxford Furniture Co
Pacer Furniture Mfg Inc
Palatial Furniture
Palliser Furniture Corp
PAMA Furniture Inc
Parlance Furniture
Pastel Furniture
Paul Robert Chair Co
Payne Street Imports
Peoploungers
Peregrine Industries Inc
Peters-Revington Furn Mfg

Phillips Collection
Phillips Sales
Piedmont Furniture Dist
Planex International Inc
Planum Furniture
Powell Co
Precedent Furniture Inc
Pride Sasser Home Furnishings
Pride Sasser Home Furnishings
Prime Resources Intl
Profit Center
Progressive Furniture Inc
Pulaski Furniture Showroom
Pulaski Furniture Showroom
Purnell Furniture Svc Inc
Quantum Furniture
Quebeko Furniture Inc
Racing Furniture
Radio Building
Raquel's Collections
Reflections Contemporary Furn
Reflections Furniture
Regency House Furniture
Rer Furniture
Ridgeway Furniture
Riley Holliday Furniture Inc
Riverside Furniture Mfg Corp
Romweber Co
Rooms To Grow Inc
Rush Industries Inc
S & C Enterprises Of Nc
S & D Furniture
Salem Square Corp
Sam Moore Furniture Industries
Sam Moore Furniture Industries
Satvoy USA LLC
Schat Import Agencies
Schnadig Corp
Shenandoah Furniture Inc
Shermag Inc
Sherrill Furniture
Sides Custom Furniture
Sierra Furniture
Sigla Furniture
Signature Home Furniture
Silver Furniture Co Inc

Simon Li Furniture
Siren Furniture
Sklar-Peppler Of Canada
Smith Furniture Manufacturing
Sofa Art By G Nicoletti
Southern Furn Reproductions
Southwood Furniture Corp
Standard Furniture Mfg Co
Stanford Furniture Corp
Stanley Furniture Co
Stanley Furniture Co
Star International Showroom
Statton Furn Mfg Co
Steware Furniture
Stickley Furniture Co
Stylecraft Of Thomasville
Stylelife Furniture
Sugar Creek
Sumter Cabinet Co
Swaim Inc Showroom
Swan Brass Bed
T & J Furniture LTD
Tera Furniture
Thomas Scott Furniture
Thunderbird Furniture
Tom Seely Furniture
Tomlinson Erwin Lambeth
Town Square Furniture Co
Tradewins LLC

Triune Business Furniture Inc
TRS Furniture Inc
Tyndall Creek Furniture
Ullmanique Inc
Ultimate Accents
United Furniture Industries
United Furniture Industries
Valco Furniture LTD
Vanguard Furniture Co
Vantage Furniture
Vaughan Furniture Co
Viewpoint Leatherworks Inc
Wagner/Byrd Furniture Distrs
Wambold Furniture
Warehouse Discount Furniture
Wayborn Furniture & Acces Inc
WEBB Furniture Co
Weiman Co
West Bros Furniture Mfg
William Alan Showroom
Wish Designs
Woodland Furniture LLC
Woodmark Originals
Wright Table Co
Yorkshire House Inc
Yorkshire House Inc
Younger Furniture Inc
Zagaroli Classics Furniture Co
Zimmerman Enterprises

Glass and Mirror Companies	48 Employers	1244 Employees
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Davidson County: 5 employers **Total employees** **799**

Carolina Precision Glass	PPG Industries Inc
City Glass & Mirror	Stroupe Mirror Co
Finch Industries Inc	

Forsyth County: 13 employers **Total employees** **204**

Art & Frames LTD	Pfaff's Inc
Clearlight Glass & Mirror Inc	Precision Glass Works Inc
Closet Works Inc	Salem Insulation & Svc
Fastframe	Trotman's Picture Framing Inc
Frame It	Village Frame Shop
Lemons Glass & Mirror Inc	Winston Shower Door Inc
Northside Glass Co	

Guilford County: 28 employers **Total employees** **232**

A Better View Glass & Mirror	Furniture City Glass & Mirror
Albert's Art & Mirrors Inc	G R Craftsmen
American Mirror Co	Glass Masters Inc
Architectural Concepts	Glass Mender
Art & Stained Glass Co	Glass Pro
Arts By Alexander	Glass Unlimited Inc
Bassett Mirror Co Inc	Guilford Glass & Mirror
Cancept Mirror & Frame	Hickory Manor House
David L Cathcart Inc	Japee's Reflections
Deans Glass & Mirror Co Inc	Majestic Mirror & Frame
Ellenburg & Shaffer Glass Art	Penland Custom Frames
Framin Place & Gallery	Q I Renn Building Products Inc
French Interiors	San Miguel Trading Co
Friedman Brothers Decorative	Southern Plate & Window Glass

Randolph County: 2 employers **Total employees** **9**

Alamance Randolph Glass Inc	Conformance Glass
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Hardware Companies	47 Employers	2358 Employees
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Davidson County: 3 employers **Total Employees 191**

Col-Eve Metal Products Co	Ultra-Mek Inc
Mepla-Alfit Inc	

Forsyth County: 21 employers **Total Employees 1219**

Arc One LLC	Peter Meier Inc
Combo Fasteners Inc	Pro Line Fasteners
Divspec	Pro-Line Fasteners Inc
Fastenal Co	Salem Fastener & Supply Inc
Fastenal Co	Salem Supply
Grass America Inc	Southeastern Fastening Systems
Kaba Ilco Corp	Southern Fastener & Supply Inc
Liberty Hardware Co	Southern Tool Mfg Co
Marco Supply Co	Statesman Industrial Sales
Monarch Group	Stratford Tool & Die Co
Penn Engineering	

Guilford County: 21 employers **Total employees 875**

Advanced Affiliates Inc	Fastener Supply Co Inc
Atlantic Fasteners	Ferrari America Inc
Automotive Fasteners	Hafele America Co
Automotive Fasteners Inc	Hardware Distributors Inc
Beane & Howard Machinery	IMI Corp
Be A Fasteners USA	Industrial Distribution Group
Beeson Hardware Co	Marco Supply
Carr Mill Supplies Inc	Piedmont Fasteners Inc
Endura Products Inc	Piranha Nail & Staple Inc
Fastenal Co	Royal Development Co
Fastenal Co	

Randolph County: 2 employers **Total employees 73**

Collier-Keyworth Co Inc	Piedmont Fasteners Inc
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Lighting Companies	11 Employers	284 Employees
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Guilford County: 11 employers

Total employees

284

Contract Concepts
Dealers Mart
Inlite Corp
Kinder-Harris Inc
Lighting Etc
Ligon Electric Supply Co Inc

Mc Lean Lighting Works
Norman Perry Lamps Inc
Sedgefield By Adams
Today's Home Inc
Wildwood Lamps

Mattress Manufacturers	28 Employers	1167 Employees
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Davidson County: 6 employers **Total employees 354**

Carolina Mattress Guild Inc	Timeless Bedding Inc
Comfor-Pedic	Value Ticking
Terrell Bros Mfg Co	Vitafoam Inc

Guilford County: 15 employers **Total employees 460**

Bemco Sleep Products Inc	Southland Bedding Co
High Point Bedding Inc	Spring Air Co
High Point Quilting	Supreme Sleep Products
Highland Fabricators Inc	Tem Memory
Jones Frame Inc	Thurmo Medical Sleep Products
Leggett & Platt Inc	Walker Bedding Co
Premiere Cushion	Walker Furniture Gallery
Reliable Quilting Co Inc	

Randolph County: 7 employers **Total employees 353**

Caudle Sewing Machine Co	Sealy Corp
Dreamland Mattress & Furniture	Sealy Mattress Co
Hickory Bedding Inc	Trinity Frame Co
Scott Maxwell Co	

Paint & Coating Companies	28 Employers	891 Employees
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Davidson County: 2 employers *Total employees* **21**

Genesis Metalworks NC Powder Works Inc

Forsyth County: 3 employers *Total employees* **112**

Johnson's Industrial Coatings Chemcraft Intl
Piedmont Industrial Coatings

Guilford County: 24 employers *Total employees* **758**

AFM Sales Inc	Protective Coating Sales
Eagle Laser Co	Safe Step Inc
Engraving Elegance	U V Technologies
Greensboro Trade Coatings	Ultra Coatings
High Performing Coating	Valspar Corp
Hilemn	Actinic Inc
Ionbond LLC	Greensboro Manufacturing
Norman E Foxworth Engraving	Sherwin-Williams
Personalized Treasures	Valspar Corp
Piedmont Laminating & Coating	Valspar Corp
PPG Industries Inc	Wood Coatings Research Group
PPG Industries Inc	

Pallet Companies	10 Employers	481 Employees
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Davidson County: 1 employers *Total employees* **120**

Pallet resource of NC Inc

Forsyth County: 2 employers *Total employees* **125**

Clemmons Pallet & Skid Works

Hensel Wood Products Corp

Guilford County: 4 employers *Total employees* **142**

Pallet Express
Pallets Plus Inc

Perfection Products Co
Triad Pallet Co

Randolph County: 3 employers *Total employees* **94**

Ifco Systems of North America
McDowell Lumber Co

Reeder Pallet Co Inc

Plywood & Veneer Companies	53 Employers	1275 Employees
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Davidson County: 9 employers **Total employees** **229**

A-1 Face Inc	Madison Senz
Acme Veneer & Laser	Southern Veneer Co Inc
Curved Plywood Inc	Warvel Products Inc
H & B Plycurves Inc	Washburn Group
Lee Veneer Products Inc	

Guilford County: 42 employers **Total employees** **1024**

Brookside Veneers	Imports Of High Point Inc
Cain Veneers Inc	Interforest
CBTUSA	J & E Sketch Face Veneer Co
Clearfield Face Veneer	Jim Horney Veneers
Columbia Panel Mfg Co	Kalstrup Wood Products Intl
Craftwood Inc	LA-Z-Boy Furniture Galleries
Cramer Wood Products Inc	M Bohlke & Veneer Corp
Creekside Veneer Solutions LLC	Mannington Wood Floors
Diamond Hill Plywood Co	Matt Wall & Son Veneers
Dimension & Plywood Inc	Mc Neil Veneers
DLM Veneers Inc	Morrow Veneer Sales Inc
Doc Edwards & Sons Veneers	Penrod Co
Emerald Wood Products Inc	Regent Plys
Erath Veneer Sales Co	Reliable Face Veneers
F M Parisette & Assoc	Ritch Face Veneer
Faces South Inc	Sauers & Co
Floyd Evans & Assoc Inc	Soboplac USA Corp
Freeman & Son Veneers Inc	Steve Smith Veneers
General WOODS & Veneers	Van Hout USA
Gross Veneer Sales	Veneer Resources Group
Herzog Veneers Inc	Ven-Ply Inc

Randolph County: 2 employers **Total employees** **22**

DLM Veneers Inc	Quality Veneer Co
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Rug & Carpet Companies	86 Employers	462 Employees
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Davidson County: 2 employers *Total employees 19*

Creative Carpets Discount Sale Nelson's Floor Fashions Inc

Forsyth County: 22 employers *Total employees 154*

Bill Hege Carpets Inc	L Bg Carpet Cleaning Svc
Buy Smart Carpet	M B Designs & Flooring
Carpet Concepts	Matthews Custom Carpets
Carpet Distributors	Metropolitan Rug Ctr
Carpet One By Henry	Oriental Treasures
Clemmons Carpet Co	Quality Carpets
COLOR Carpets	Resource NC
Faulkner Flooring Inc	Shaw Industries Inc
Floor Coverings Intl	Styron Floor Covering
Jewell Interiors Inc	Triad Floor Covering Inc
Kernersville Carpets	Triple AAA Carpets Inc

Guilford County: 54 employers *Total employees 261*

A & A Mahdavis Rug Co Inc	Hodgin's Carpet & Exteriors
Abu Rugs & Home	Howell Flooring Installation
Alatheia Interiors	Imperial Carpet Inc
American Rug Craftsman Inc	International Textile Group
Asia Minor Carpets Inc	J Idol Floor Covering
Bacova Guild LTD	L & E Carpet & Equipment Co
Britt Floor Covering	Malik Carpets
Carolina Carpet Sales & Svc	Marcella Fine Rugs Inc
Carolina Classic Carpets	Masland Carpets LLC
Carpet One By Henry	Masterpiece Rugs
Carpet Super Mart	Miresco Decorative Rugs
Custom Carpet Inc	Monnett Carpets & Draperies
Dalyn Rug Co	Nationwide Floor & Window
Elkes Carpet Outlet Inc	Oak Ridge Carpet
Feizy Import & Export Co	Patterson Carpets
Flooring Creations	Right Touch Residential Intrrs
Flooring Depot	S & S Floorcovering
Foreign Accents	Sharp-Carter Corp
French Accents Rug & Tapestry	Shaw Rugs
Glover Carpets & Interiors Inc	Sina Oriental Rugs
Hardwoods Unlimited Inc	Stanton Carpet Corp
Hellenic Rug Imports Inc	Swaringen Carpets Inc

Tamarian Carpets Inc
Tinnin Oriental Carpets
Totally Floored
Trade AM Intl
Upton's Carpet & Rug Gallery

Upton's Carpet & Rug Gallery
Warehouse Carpet
Where It's At
ZAKI Oriental Rugs
Ziba Oriental Rugs

Randolph County: 8 employers

Total employees

28

Asheboro Flooring Ctr
B & G Floor Svc
Carpet Place
Davis Carpets

Donald's Floor Covering Inc
Flinchum's Quality Floors Inc
Interiors Exteriors Inc Carpet
Wholesale Carpet Distributors

Spring Wire Companies	6 Employers	485 Employees
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Guilford County: 6 employers

Total employees

485

George W Lane Co
 Jones Frame Inc
 Lee Spring Co

Leggett & Platt Inc
 Leggett & Platt Inc
 Universal Spring Co

Trade Associations	<i>9 Employers</i>	<i>60 Employees</i>
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American Home Furnishings Alliance
National Home Furnishings Association
The Interior Design Society IDS
International Furniture Suppliers
Association
Southern Home Furnishings Association

International Home Furnishings
Representatives Association IHFRA
International Textile Market Association
ITMA
International Wholesale Furniture
Association
North Carolina Export Council

Trade Publications	<i>4 Employers</i>
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Home Furnishings Business
High Point Enterprise – Market Express
Home Furnishings Retailer

Reed Business Information – Furniture
Today +

Trucking Companies	182 Employers	6825 Employees
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Davidson County: 37 employers

Total employees 1472

B S Leonard Trucking Co
 Billings Freight Systems Corp
 Billings Transportation Group
 Buck's Wrecker Svc Inc
 C & T Durham Trucking Inc
 C Curtis Perry Trucking
 Caldwell Freight Lines
 Cargo Carriers Inc
 Carrera Transport Inc
 Cato Transport Inc
 Cato Transportation Inc
 Celadon Trucking Svc
 DNI
 Executive Consolidation Svc
 Fonds Kay Inc
 Gee Trucking Inc
 Gosson Freightways Inc
 Grooms Transportation Inc
 H P Logistics

Ike Essick Trucking Co
 K C Express Inc
 Larry Brooks Trucking Inc
 LBT Freight Brokers Inc
 Mark Coman Trucking
 Maxon's Trucking Inc
 Murrow's Transfer Inc
 Old Dominion Freight Line Inc
 Peace Transport Inc
 Penny Xpress
 R U Trucking Inc
 S & H Express Inc
 Shelba D Johnson Trucking Inc
 Summey Trucking Co
 T & C Express
 T & H Transportation
 Trinity Transport Inc
 William Roten Trucking Inc

Forsyth County: 42 employers

Total employees 1241

ABF Freight System Inc
 All State Express
 Auditech
 B & D Kiser Inc
 Bennie Graves Trucking Inc
 Benton Express Inc
 Best Cartage Inc
 BNSF Logistics
 Bridgeways Inc
 C H Robinson Worldwide Inc
 Caldwell Freightlines Inc
 Carolina Logistics Svc Inc
 Carr's Freight Agent Inc
 Con-Way Freight-Southern
 Ed-Truck Garage
 Fed Ex Logistics
 Fed Ex National LTL
 Fed Ex National LTL
 Fourway Warehouse & Distr

Hasting Eagle Trucking Co
 Hercules Inc
 Keep On Truckin'
 Landstar Inway Inc
 Landstar Inway Inc
 Mc Tire
 Mike's Truck Svc Inc
 Morton Motor Express
 Multi-Level Svc
 Roadway Express Inc
 Ryder Integrated Logistics Inc
 Salem Logistics Inc
 Sanders Transfer Co
 Service First Express Inc
 Special Event Transportation
 Tci Logistics Inc
 Team Effort Express
 Truck Lease Svc Inc

W D Hauling
W H Svc Inc
W T Logistics

Whiteheart Freight Systems
Yellow Transportation Inc

Guilford County: 92 employers

Total employees

3951

AAA Cooper Transportation
ABC Traffic Consultants Inc
Adria Transports Inc
Anytime Logistics
Apco Freight Systems Inc
Best Cartage
BFG
Buck's Transportation
Buck's Wrecker Svc
C & Y Transportation Inc
Cameron & Cameron
Carolina Freight Express
Carolina Freight Express
Carolina Freight Express Inc
Celadon Trucking Svc Inc
Central Warehouse &
Forwarding
Cox Motor Express Inc
Custom Home Delivery Inc
D & D Delivery Svc Inc
Dasco Transport Inc
Dixon Enterprises-High Point
East Coast Leasing Inc
Epes Logistics Svc
Epes Transport Systems Inc
Estes Express Lines
Fed Ex Freight
Firstfleet Inc
FLS Transportation
Forward Air Inc
Freight Savers
Global Logistics Inc
Greensboro Express Inc
Gwinn Transportation
Hawkeye Hauling Inc
High Point Transportation Inc
Hill Enterprise-Trucking
Hughes Transport
Innovative Driver Svc

Intermodal
Lilly's Trucking
M C Express Inc
MGM Transport Corp
Milan Express Inc
Miller Express
NBT Inc
Nealon Transportation
New Breed Inc
Old Dominion Freight Line Inc
Old Dominion Freight Line Inc
Palmer Transport Inc
Paragon Freight
Premier Transportation
Priism Group Inc
R & D Trucking Of High Point
R & R Transportation
Rap's Transportation
Raven Transport Co Inc
Royal Logistics
Safe
Saia Motor Freight Line Inc
Same Day Xpress
Service First Logistics
Shaffer Trucking Inc
Shepard Motor Lines Inc
Shepard Motor Lines Inc
Single Source Transportation
Southeastern Freight Lines
SRL Logistics
Steve's Truck Svc
Sunbelt Furniture Xpress Inc
Superior Carriers Inc
Superior Carriers Inc
Systems Logistics
Systems Logistics LLC
Tar Heel Paving Co
Thermo King
Thurman Contract Hauling

Thurman Contract Hauling Inc
Trailer Switchin Xpress
Trans Service Trucking Inc
Transcorp Inc
Triad Freight Svc
United Haulers Of High Point
UPS Freight

USA Carriers
USF Holland Inc
Vaja Express
Valley Trucking
W P Hauling
Wilson Trucking Corp
Yellow Freight System Inc

Randolph County: 11 employers

Total employees

161

Central Carolina Carriers
CJS Leasing Inc
Crotts Enterprise
D & G Express Inc
Green Lines Transportation Inc
Inland Traffic Control Inc

Liberty Express
Northstar Transport Inc
Southern Enterprises
Thomasville Transport Inc
Yellow Freight System Inc

Upholstery Manufacturers	47 Employers	7004 Employees
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Davidson Count: 9 Employers **Total employees** **305**

Classics By Casa Bique	Oakridge Manufacturing Inc
Dorsett Upholstering	Vitafoam Inc
Hedrick Of Thomasville Inc	Winston Concepts Furniture Co
Images Of America Inc	Younger Furniture Inc
International Furnishings Inc	

Guilford County: 29 Employers **Total employees** **2222**

3-D Upholstery Inc	Jessica Charles Furniture
Adams-Pierce Furniture Inc	LA-Z-Boy Furniture Galleries
American Of High Point Inc	Nap-Time Furniture
Ashley Manor	O'Henry House LTD
Baker Furniture Co	PAMA Furniture Inc
Blakeline Furniture	Pearson Co
Brayton International Inc	Seam-Craft Inc
Classic Gallery Inc	Sedgewick Industries Inc
Claude Gable Co	Select Furniture Mfr
Custom Creations By Marlowe	Sides Custom Furniture
Directional Inc	Swaim Furniture
Drexel Heritage Home Frnshngs	William Alan Inc
Edward Ferrell LTD	Willow Creek Furniture
Harris House Furniture	Woodmark Originals
High Point Furniture Ind Inc	

Randolph County: 9 Employers **Total employees** **4477**

Carolina Furniture Mfr Inc	Landon Furniture Inc
Earl's Of High Point	Markay Designs Inc
H & H Furniture Mfg Inc	Michael Thomas
Hughes Furniture Industries	Wright's Furniture
Klaussner Furniture Industries	

Warehouse Distribution Companies	5 Employers	198 Employees
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<i>Guilford County: 5 employers</i>	<i>Total employees</i>	<i>198</i>
City Transfer Storage	Ploi & Co.	
Legacy Classic Furniture Inc	Universal Furniture INTL	
Lifestyle Enterprises Inc		