

Tennessee Leaders Action Platform



global action
platform
food+health+prosperity

Zone 1: Tri-Cities

Competitiveness and Clusters Factbook 2026



**CLUSTER
MAPPING**

A Strategy and Competitiveness Associates project

Made possible through the generous support of the
John R. Ingram Advised Fund of the Community Foundation of Middle Tennessee.

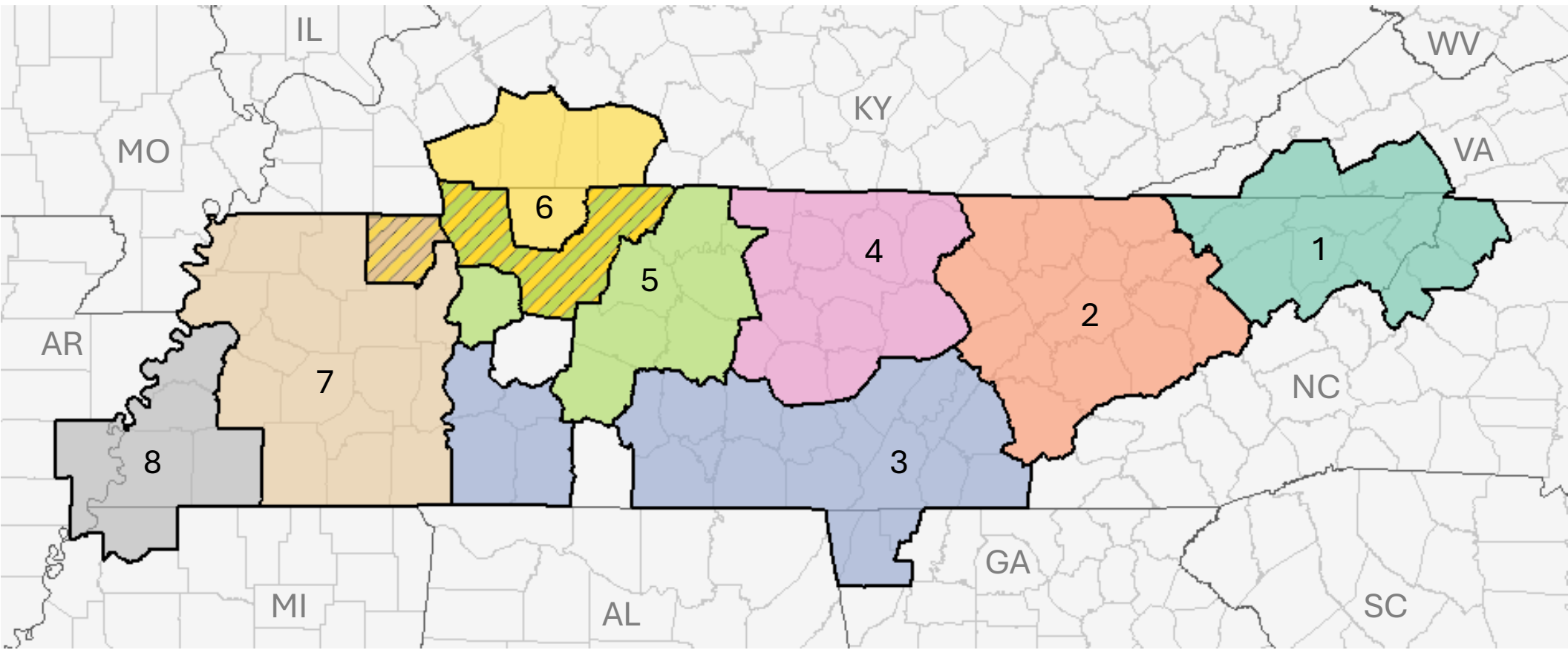
Introduction

The research and publication of the Tennessee Competitiveness Scorecard and the Regional Competitiveness and Cluster Factbooks are made possible through the generous support of the **John R. Ingram Advised Fund of the Community Foundation of Middle Tennessee** to provide a data-driven foundation for regional competitiveness.

Global Action Platform has organized the Tennessee Leaders Action Platform to advance the competitiveness and guide the eight major cluster economies anchored in Tennessee and adjacent states. This Competitiveness and Cluster Factbook is provided to the Fellows of the Porter Development Initiative Fellows Academy to advance data-driven strategies and decisions for regional development. The Academy gives Tennessee leaders access to cutting-edge ideas, metrics, and practical strategies to create shared prosperity for their communities and supports initiatives that connect creation of globally competitive innovation hubs with education and research, regional collective impact collaboration, and quality of life.

Strategy and Competitiveness Associates has leveraged data from the US Cluster Mapping Project to assemble factbooks customized for each of the eight Tennessee Leaders Action Platform (TLAP) regions. These factbooks are structured around the four major themes for the inaugural TLAP conference to be held in June 2026: Innovation Hub Development, Education and Workforce, Collaborative Governance, and Quality of Life. This work owes much to our long collaboration with Prof. Michael E. Porter at Harvard Business School, especially around his insights on the foundational role of Traded Clusters in regional economic development and on the role of public-private partnerships in support of the quality of regional business environments surrounding clusters and in support of social progress for all citizens.

Tennessee Leaders Action Platform: Eight Zones Organized



- Zone 1: Tri-Cities
- Zone 2: Knoxville-Oak Ridge
- Zone 3: Chattanooga
- Zone 4: Cookeville-Crossville
- Zone 5: Nashville
- Zone 6: Clarksville-Fort Campbell
- Zone 7: Jackson-Martin
- Zone 8: Memphis

Note: The Clarksville-Fort Campbell Zone overlaps with two other zones.

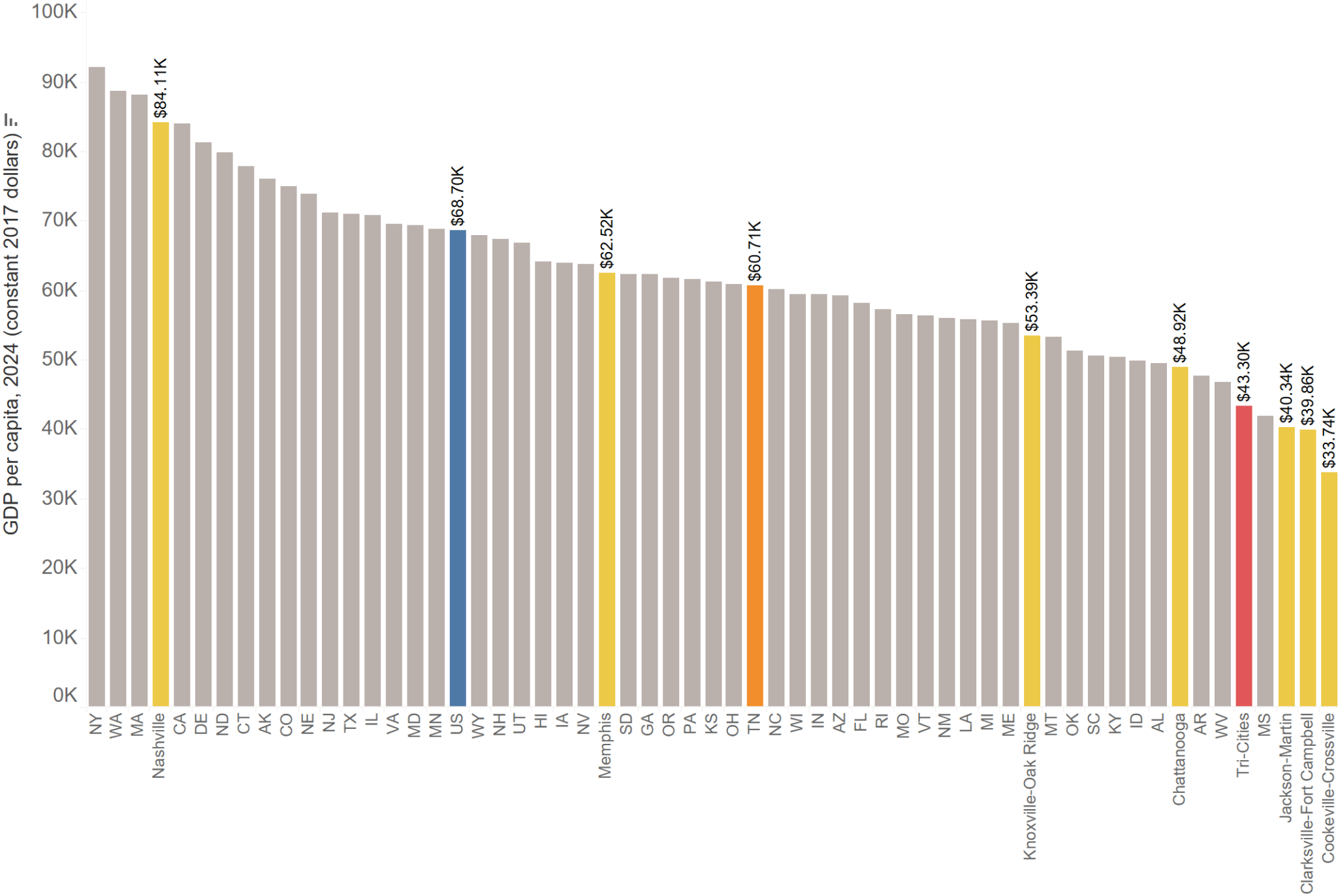
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Economic Outcomes

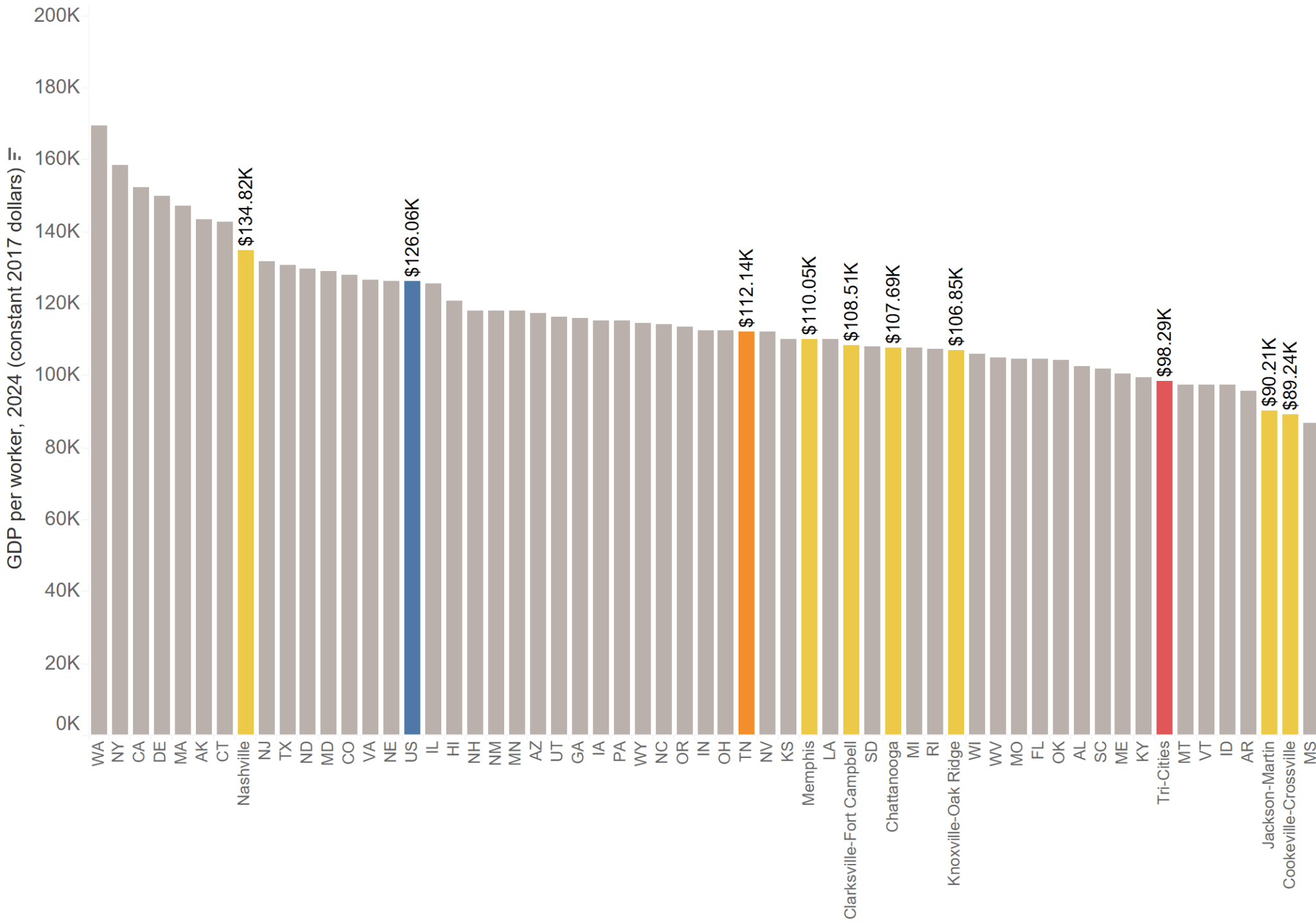
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GDP per capita, 2024



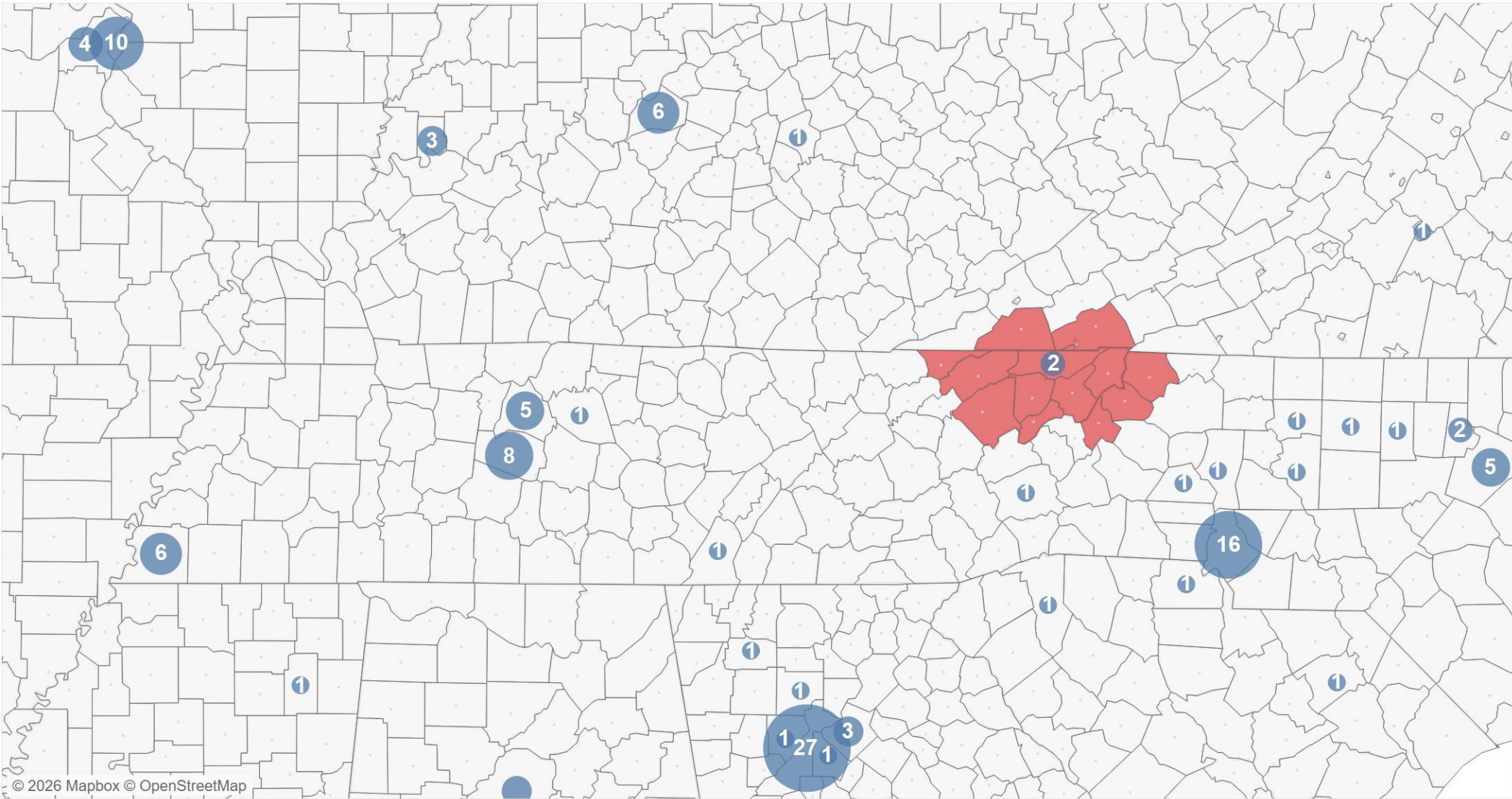
Source: US Cluster Mapping Project; BEA; Census

GDP per worker, 2024



Source: US Cluster Mapping Project; BEA; Census

Fortune 1000 Company Headquarters Locations



© 2026 Mapbox © OpenStreetMap

Number of HQs by county

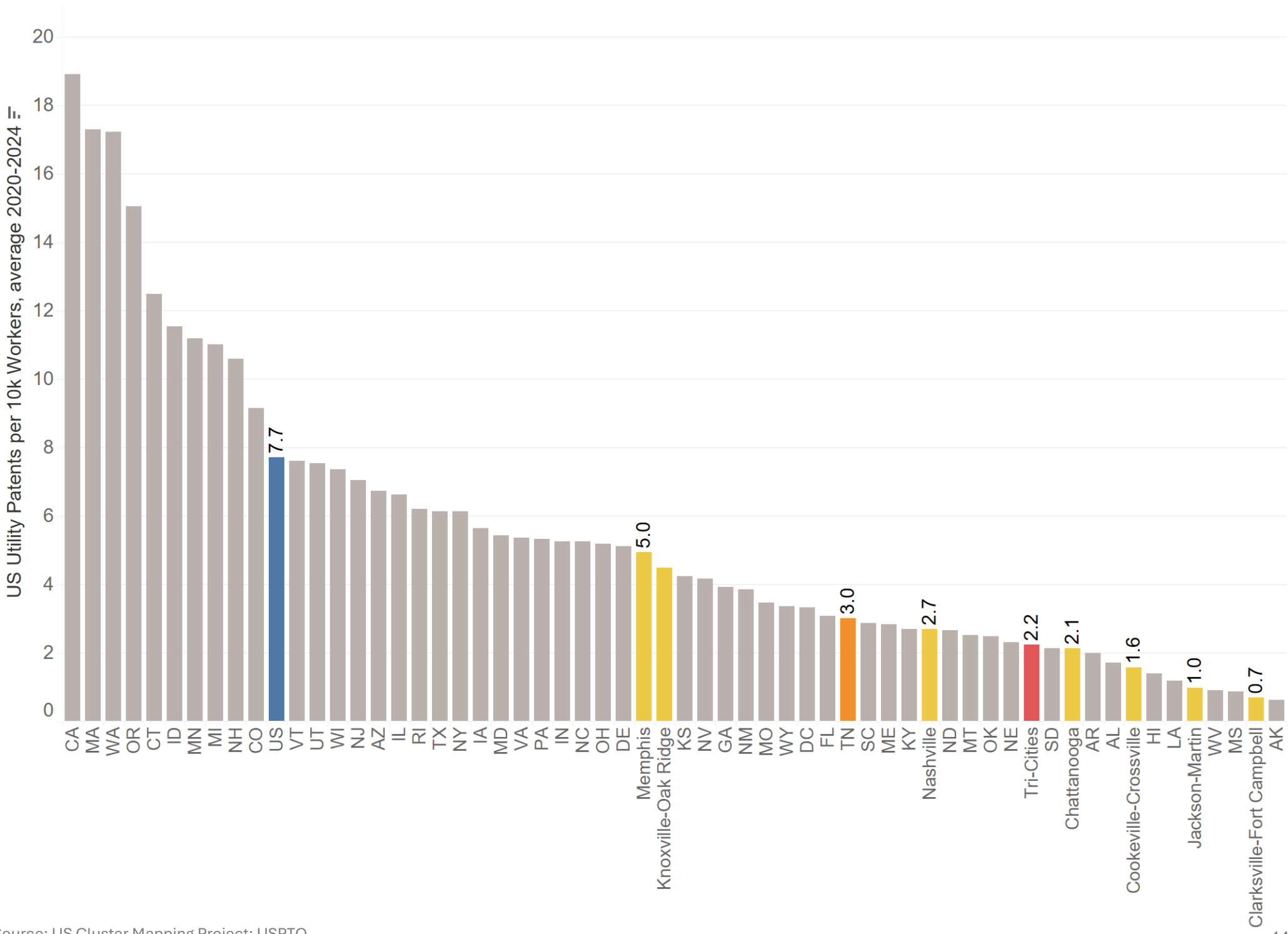
Zone 1: Tri-Cities

Rank	Company	City	State	Industry	Market Value
431	Eastman Chemical	Kingsport	Tennessee	Chemicals	\$10.17B
925	Alpha Metallurgical Resources	Bristol	Tennessee	Mining, Crude-Oil Production	\$1.63B

Innovation Inputs

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Share of Employment Created through FDI*	page 19
Export Intensity and Rate of Growth*	page 20

Patenting Intensity, 2020-2024



Source: US Cluster Mapping Project; USPTO

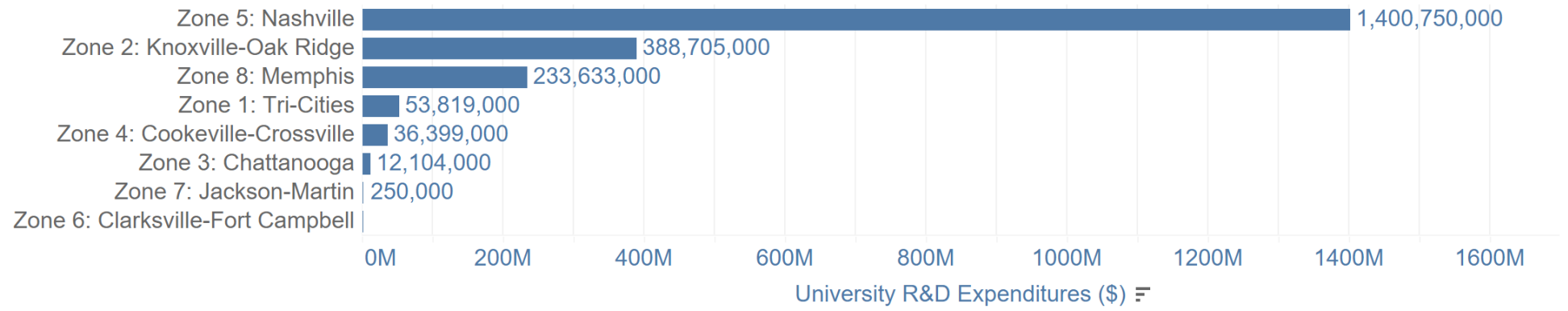
Utility Patents by Organization, 2020-2024

Zone 1: Tri-Cities

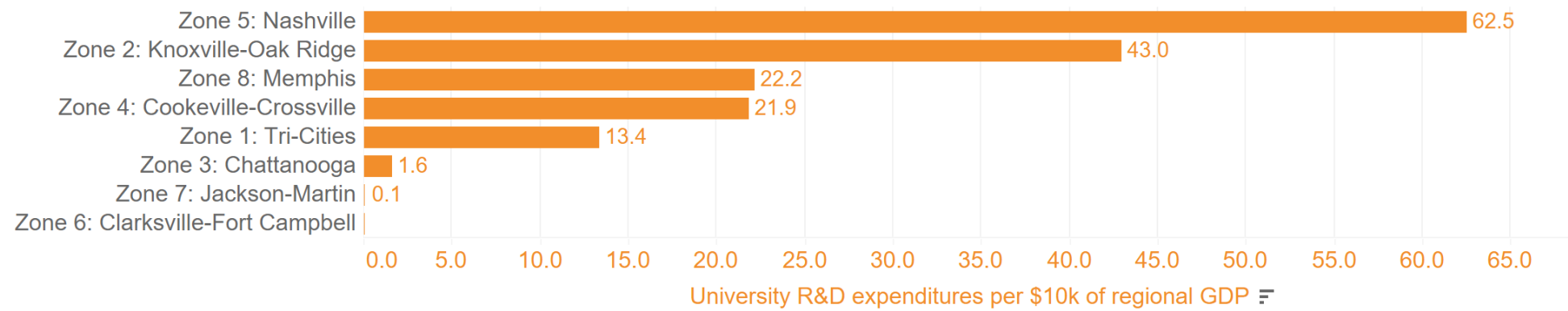
EASTMAN CHEMICAL COMPANY	166
PARKER-HANNIFIN CORPORATION	12
EAR TECH, LLC	9
HD CLEAN, LLC	9
PNEUMA RESPIRATORY, INC.	9
STRYKER CORPORATION	8
ICONEX LLC	6
BOOZ ALLEN HAMILTON INC.	5
ECR SOFTWARE CORPORATION	5
SYNTHOMER ADHESIVE TECHNOLOGIES LLC	5
GROUPON, INC.	4
STONE MOUNTAIN TECHNOLOGIES, INC.	4
WELLOVATE, LLC	4
EAST TENNESSEE STATE UNIVERSITY RESEARCH FOUNDATION	3
EYENOVIA, INC.	3
A. O. SMITH CORPORATION	2
ADVANTAGE PLASTICS, INC.	2
ALTRIA CLIENT SERVICES LLC	2
AQUESTIVE THERAPEUTICS, INC.	2
BELL HELICOPTER TEXTRON INC.	2
CALLION PHARMA, LLC	2
DISH WIRELESS L.L.C.	2
INTEL CORPORATION	2
KEARNEY-NATIONAL INC.	2
MICRONIC TECHNOLOGIES, INC.	2

Note: Showing organizations with at least 2 patents 2020-2024 and in top 25 for region.
 Location is assigned by address of the first listed inventor and may differ from organization location.
 Source: US Cluster Mapping Project; USPTO.

University R&D Expenditures by TLAP Region, 2024



University R&D Intensity by TLAP Region, 2024

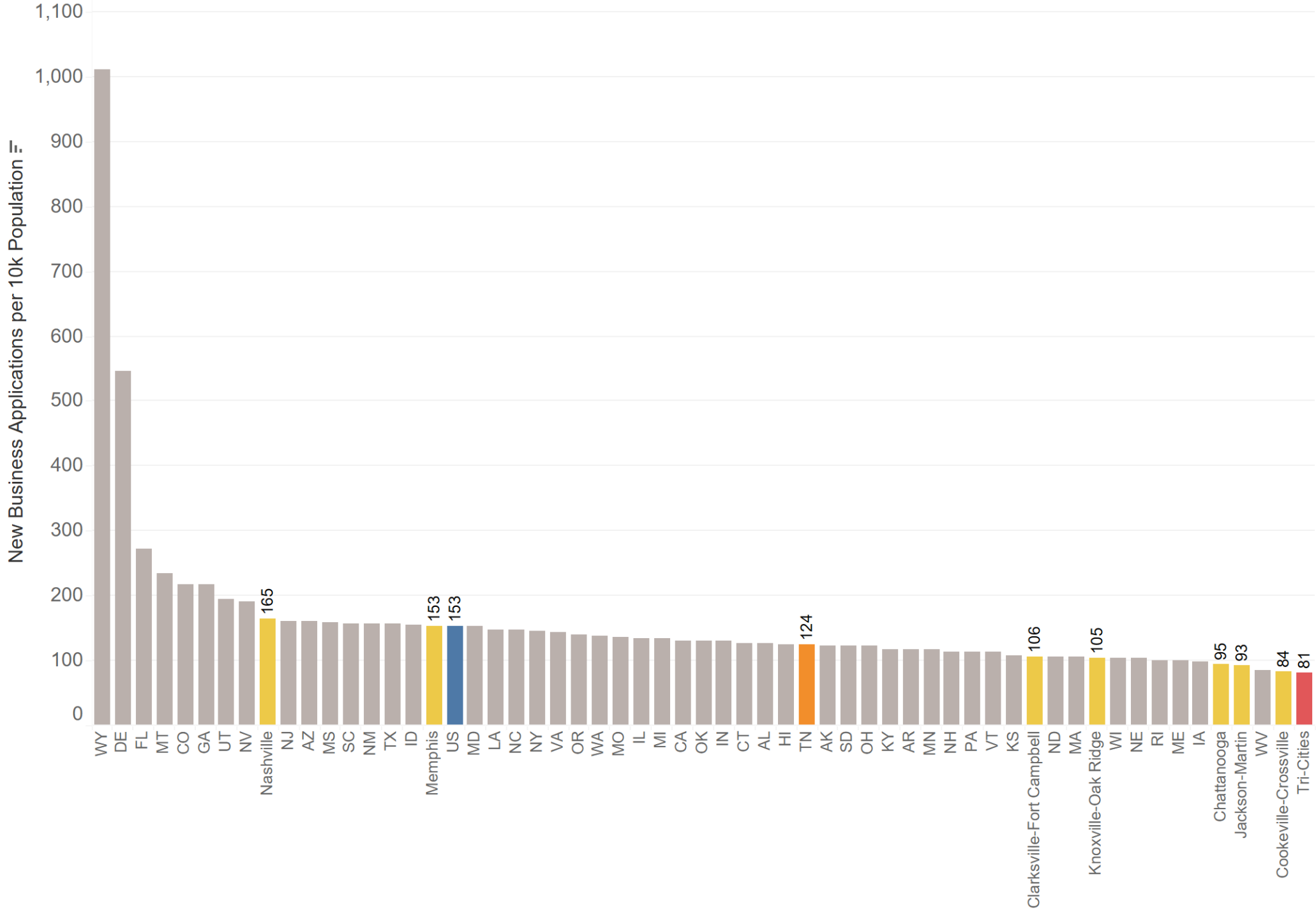


R&D Expenditure by University, 2024

Zone 1: Tri-Cities	East Tennessee State U.	\$42,526,000
	Appalachian State U.	\$11,293,000
Zone 2: Knoxville-Oak Ridge	U. Tennessee, Knoxville	\$386,949,000
	Lincoln Memorial U.	\$1,756,000
Zone 3: Chattanooga	U. Tennessee, The, Chattanooga	\$12,104,000
Zone 4: Cookeville-Crossville	Tennessee Technological U.	\$36,399,000
Zone 5: Nashville	Vanderbilt U. and Vanderbilt U. Medical Center	\$1,327,870,000
	Tennessee State U.	\$35,017,000
	Meharry Medical C.	\$23,691,000
	Middle Tennessee State U.	\$8,736,000
	Fisk U.	\$3,425,000
	Lipscomb U.	\$2,011,000
Zone 7: Jackson-Martin	U. Tennessee, The, Martin	\$250,000
Zone 8: Memphis	U. Tennessee, Health Science Center	\$124,771,000
	U. Memphis	\$108,862,000

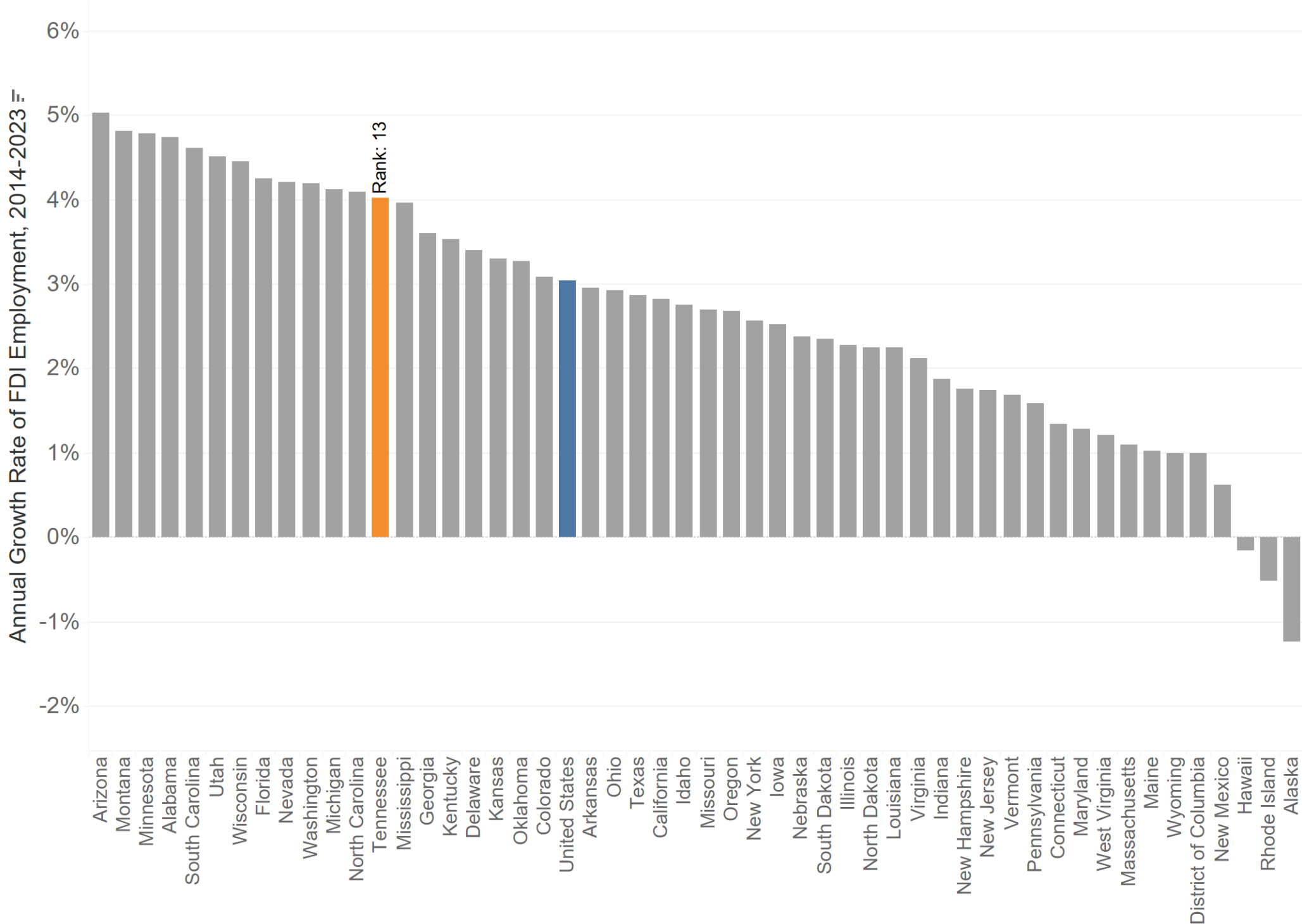
Source: US Cluster Mapping Project; NSF NCSES

New Business Formation, 2024



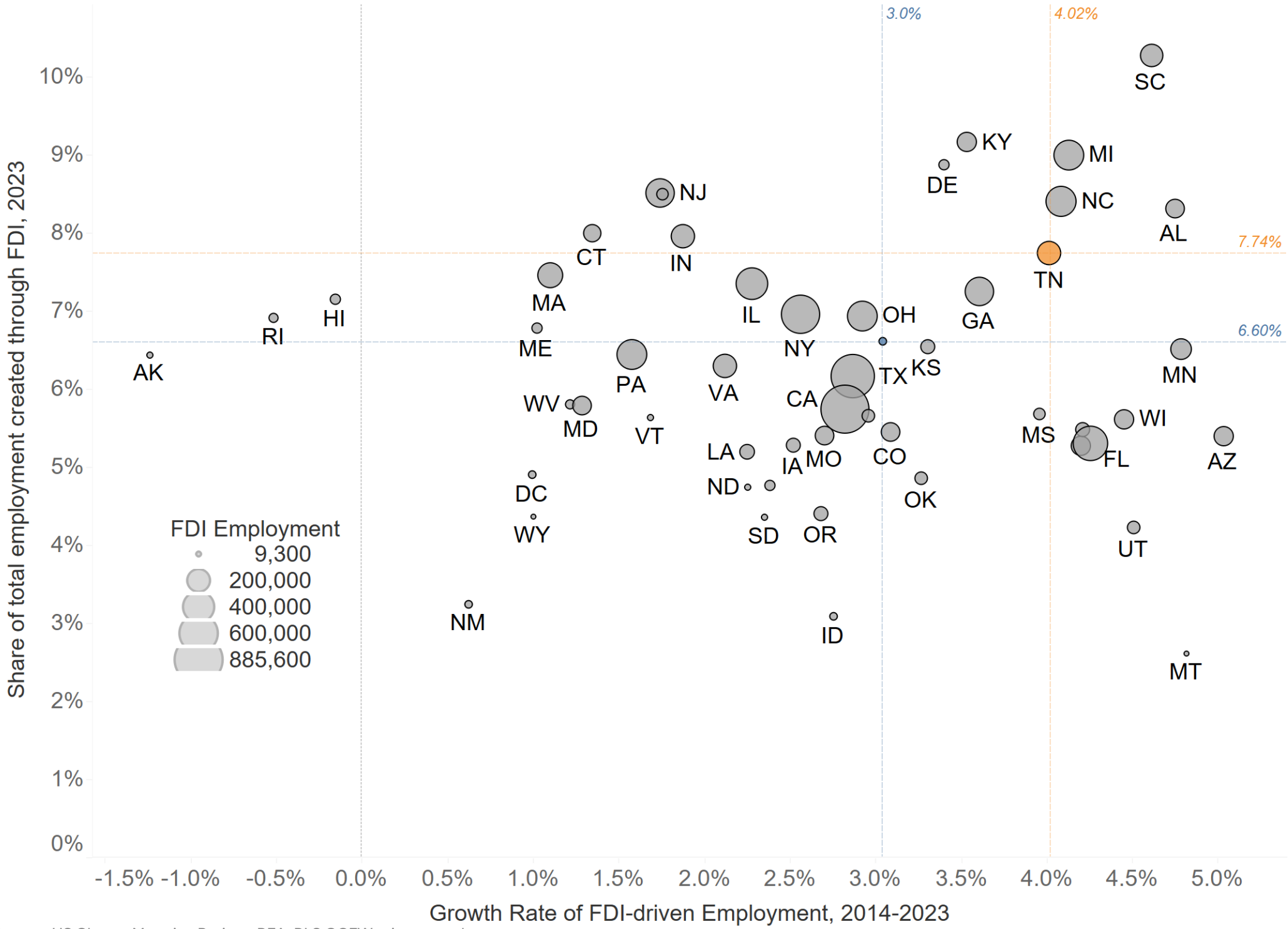
Source: US Cluster Mapping Project; BEA; Census

Growth Rate of FDI-driven Employment, 2014-2023



Source: US Cluster Mapping Project; BEA

Foreign Direct Investment, 2014-2023



Source: US Cluster Mapping Project; BEA; BLS QCEW private employment

Export Intensity and Rate of Growth, 2014-2024

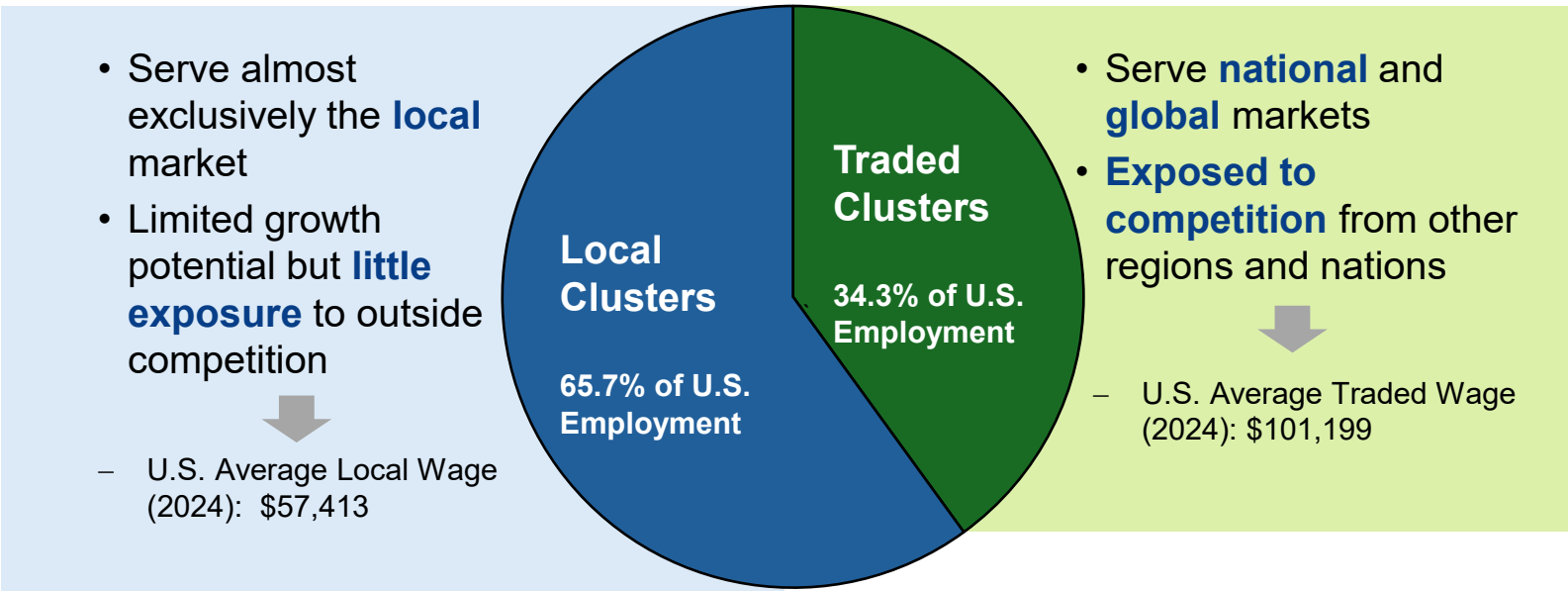


Source: US Cluster Mapping Project; BEA; USATrade. Nominal values.

Cluster Composition

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Tri-Cities: Traded versus Local Clusters

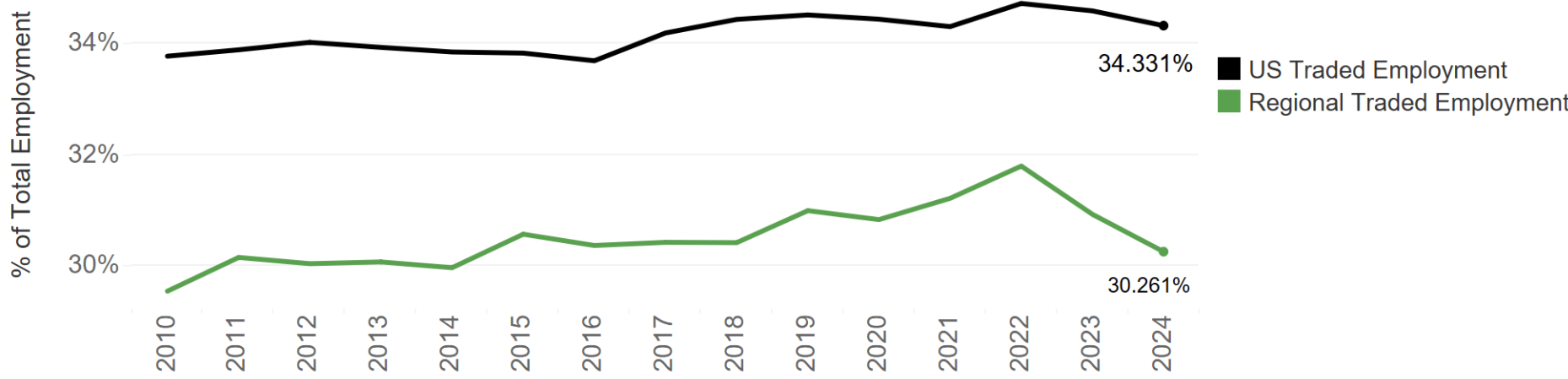


Traded Employment Share, 2024

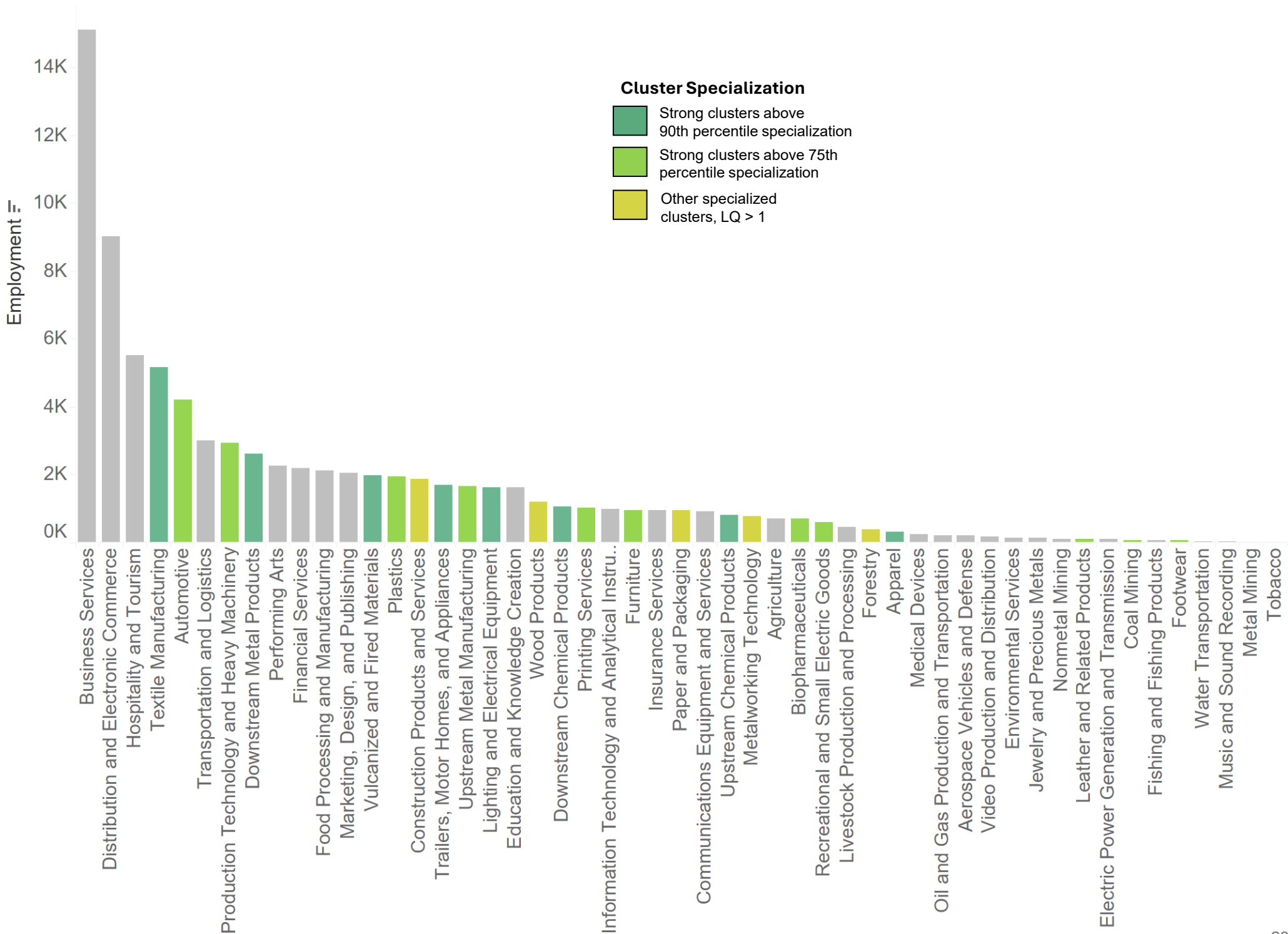
	Local	Traded
Regional Employment	69.7%	30.3%
US Employment	65.7%	34.3%

Tri-Cities Relative Wages, 2024

	Local	Traded	Total
Regional Wage	46,408	66,345	53,273
US Wage	57,413	101,199	72,465
Percent of US	80.8%	65.6%	73.5%

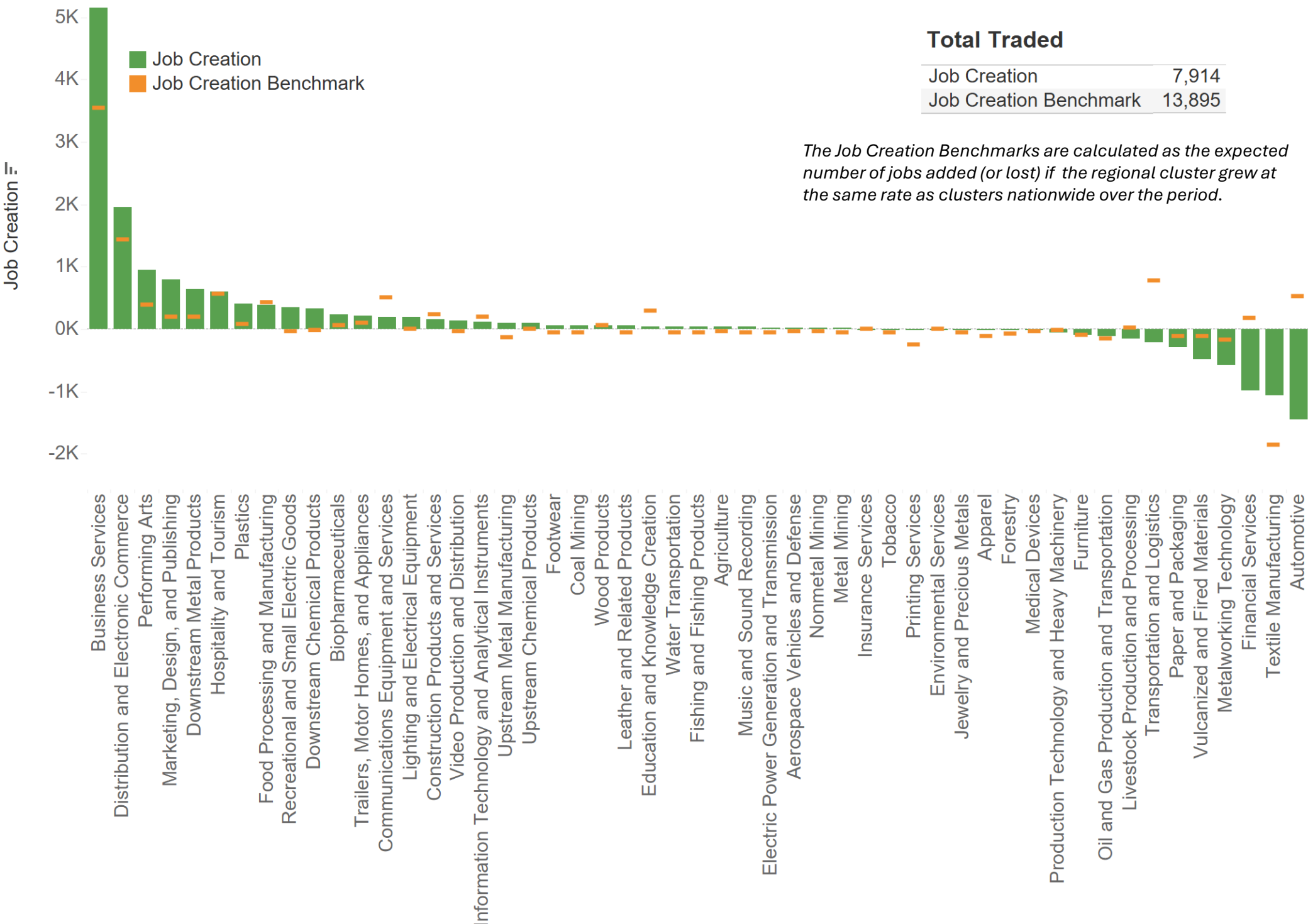


Tri-Cities - Employment in Traded Clusters, 2024

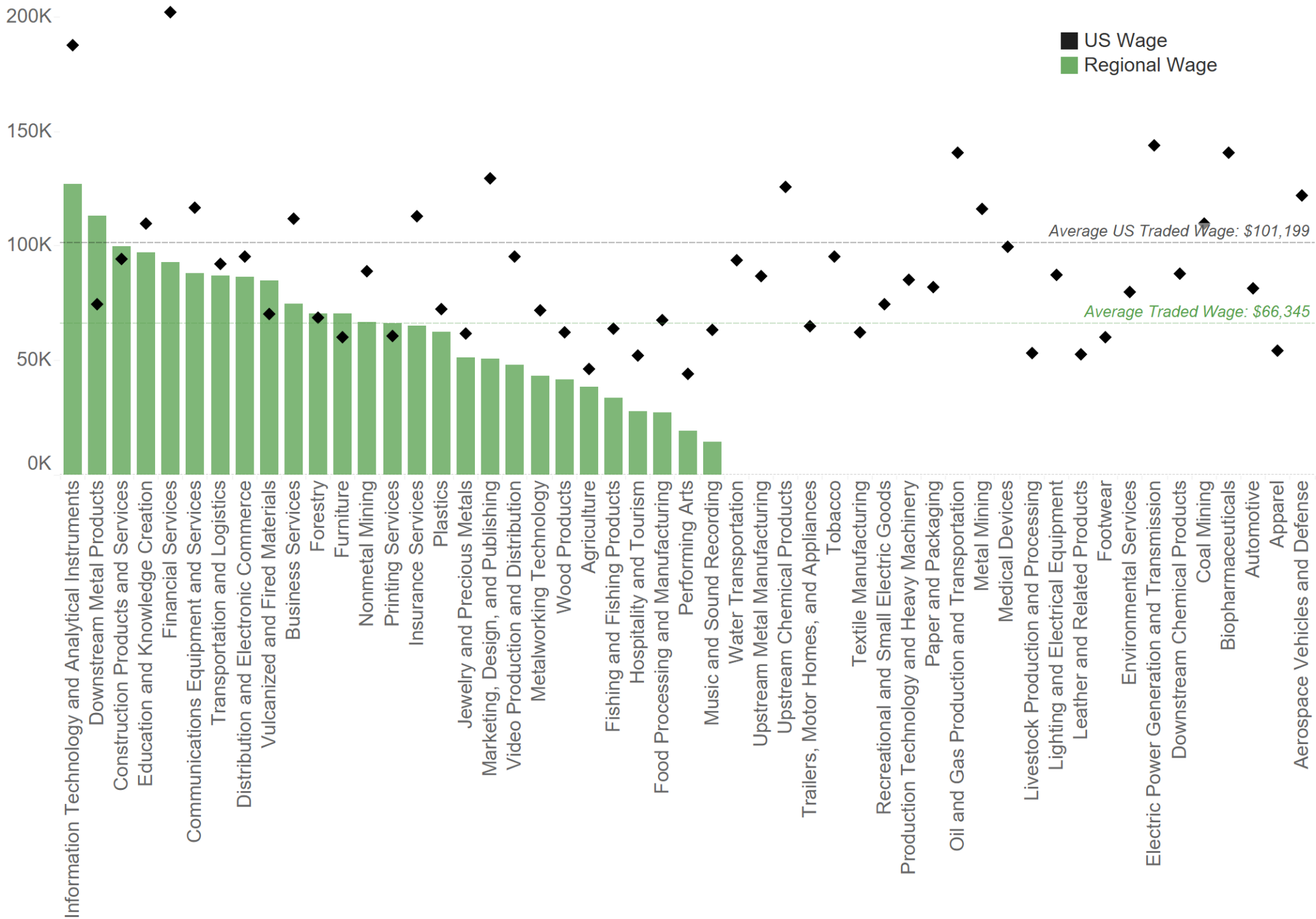


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Tri-Cities - Job Creation in Traded Clusters, 2014-2024



Tri-Cities - Wages in Traded Clusters, 2024

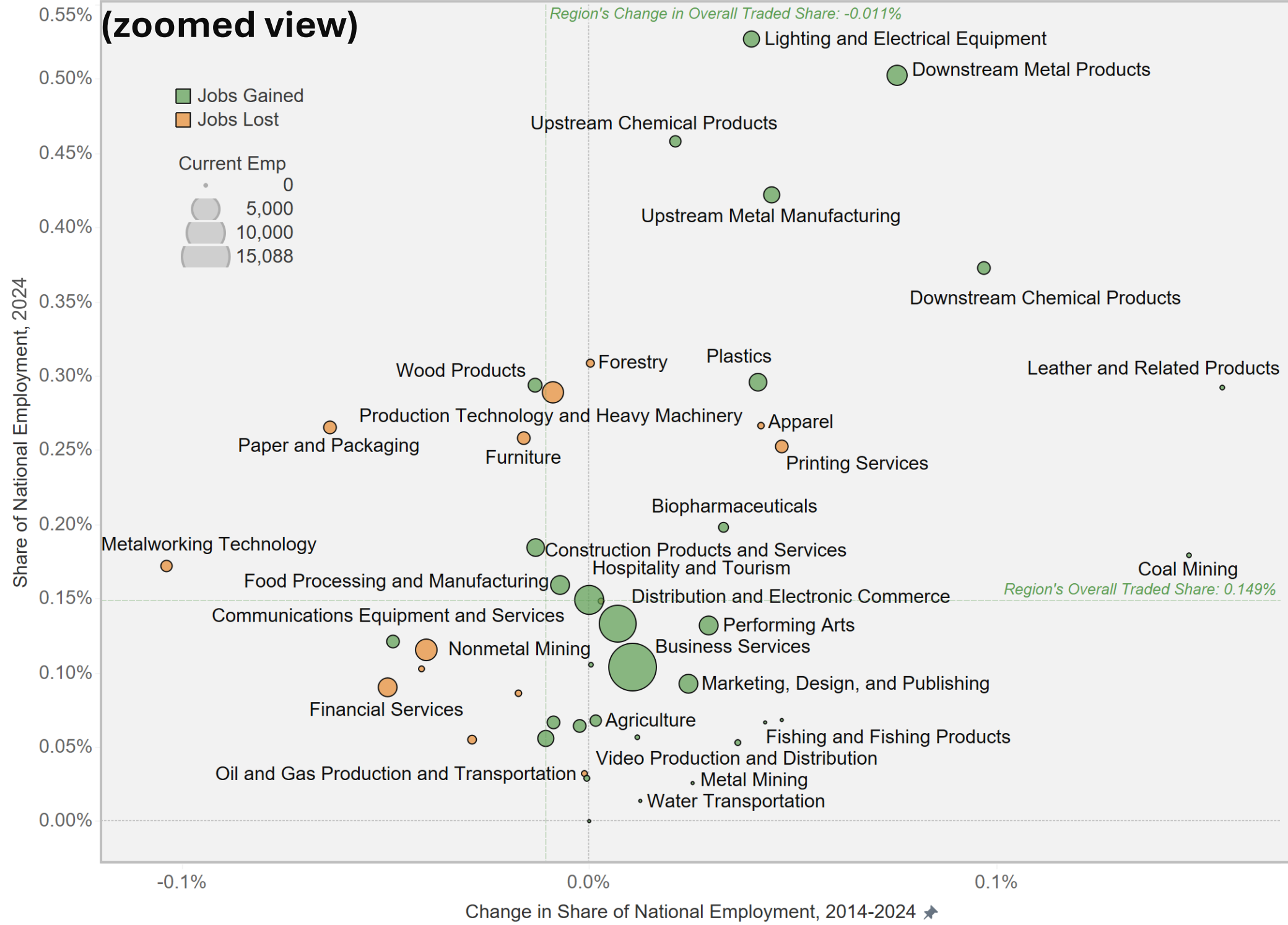


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Zone 1: Tri-Cities - Specialization in Traded Clusters, 2014-2024



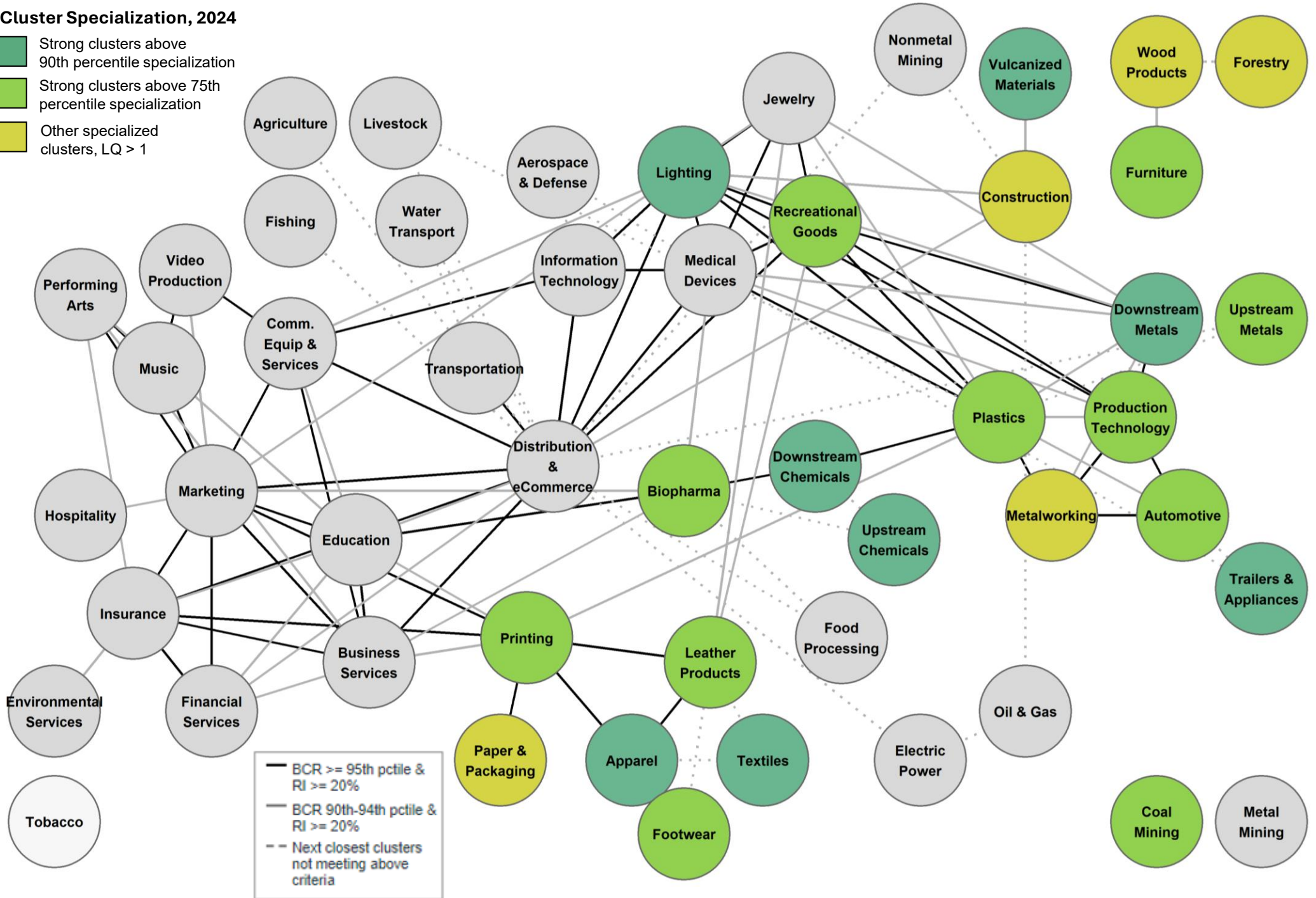
Zone 1: Tri-Cities - Specialization in Traded Clusters, 2014-2024



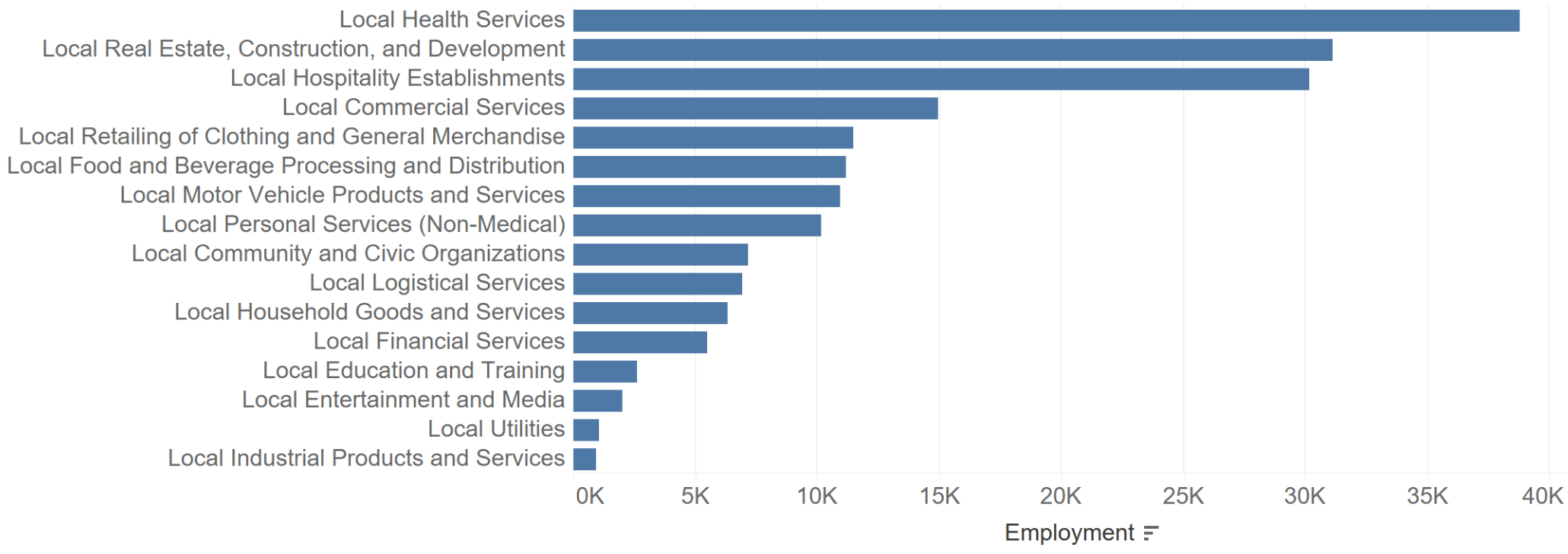
Tri-Cities Cluster Linkages and Economic Diversification

Cluster Specialization, 2024

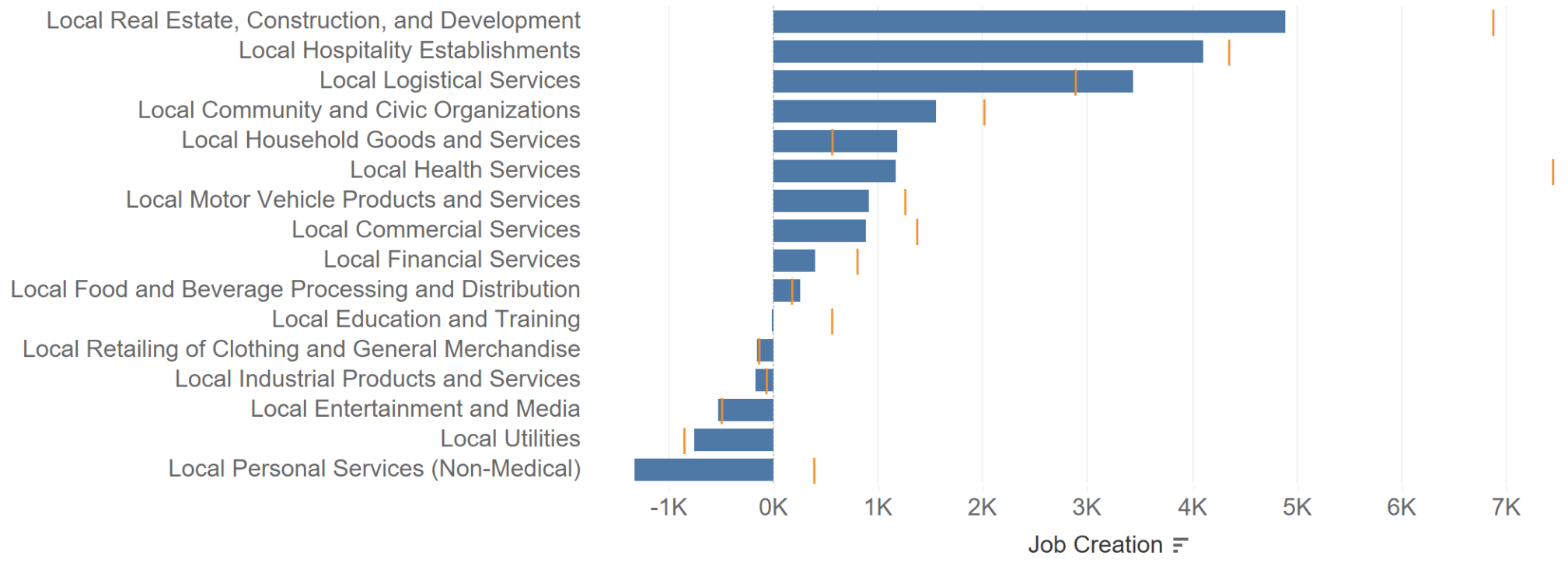
- Strong clusters above 90th percentile specialization
- Strong clusters above 75th percentile specialization
- Other specialized clusters, LQ > 1



Tri-Cities - Employment in Local Clusters, 2024



Tri-Cities - Job Creation in Local Cluster, 2014-2024

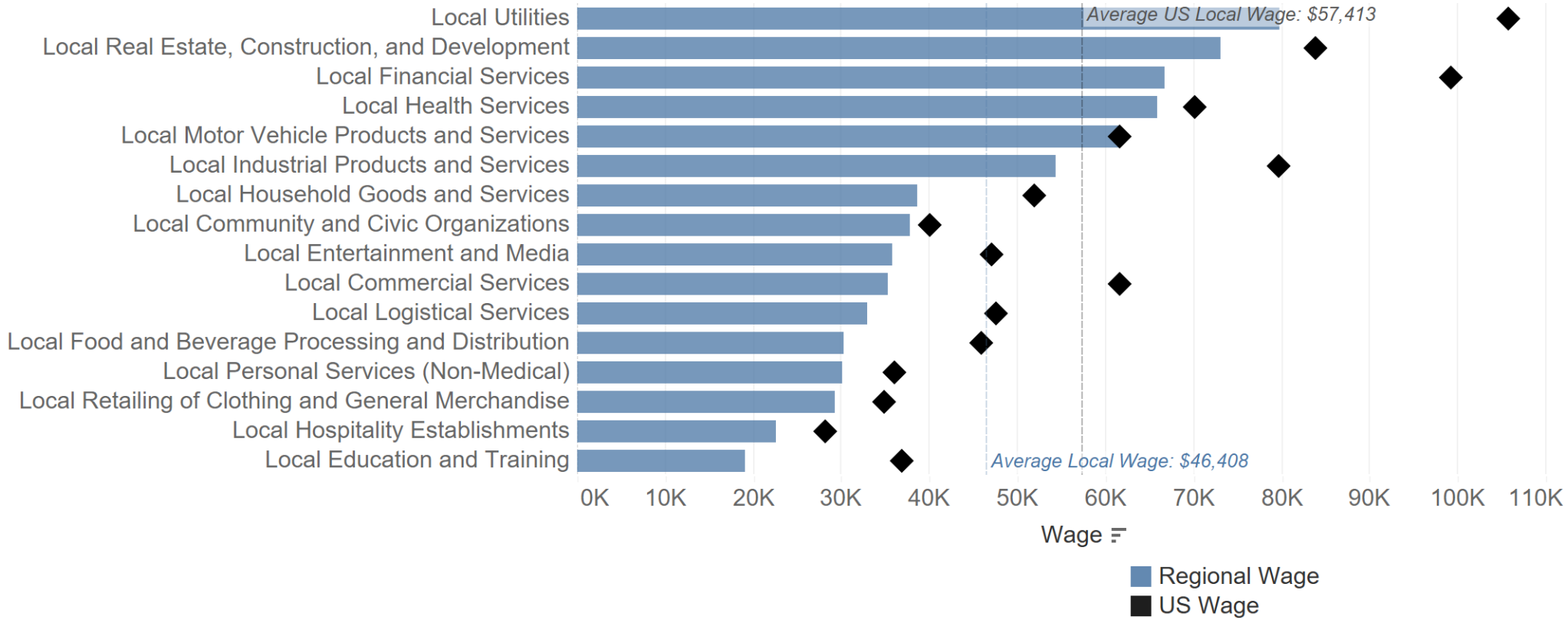


Total Local

Job Creation	15,844
Job Creation Benchmark	28,122

The Job Creation Benchmarks are calculated as the expected number of jobs added (or lost) if the regional cluster grew at the same rate as clusters nationwide over the period.

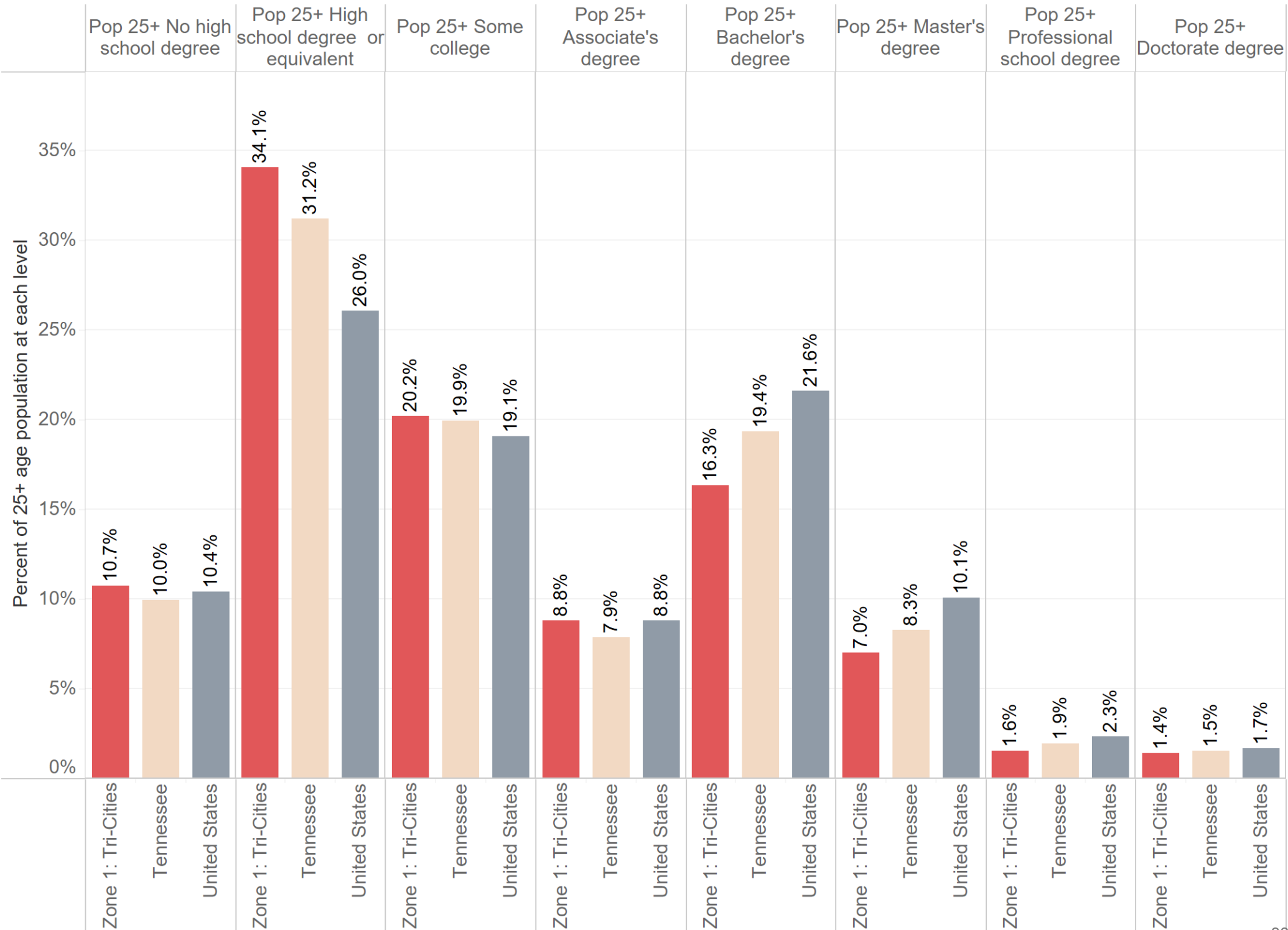
Tri-Cities - Wages in Traded Clusters, 2024



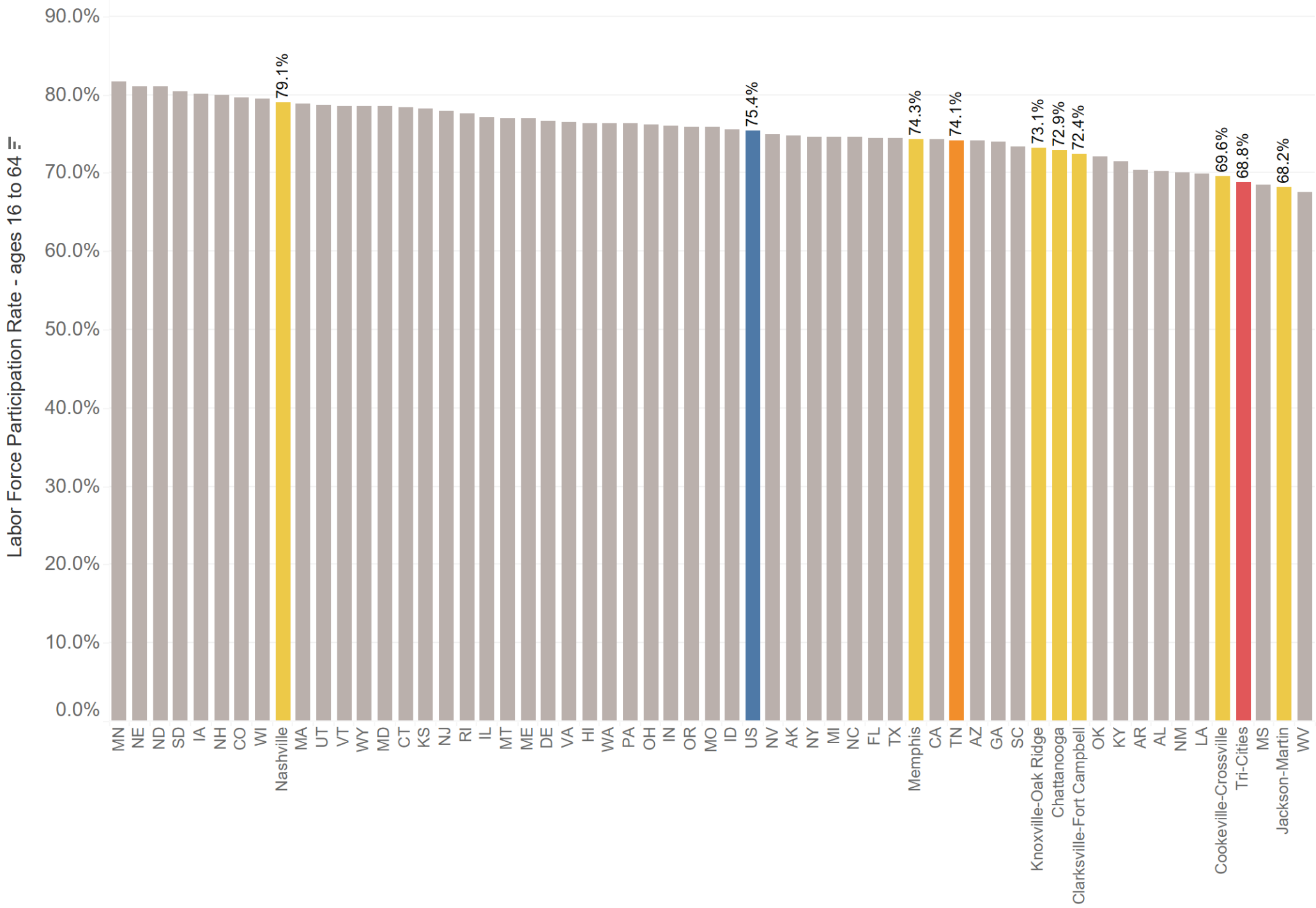
Education and Workforce

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Educational Attainment, 2024

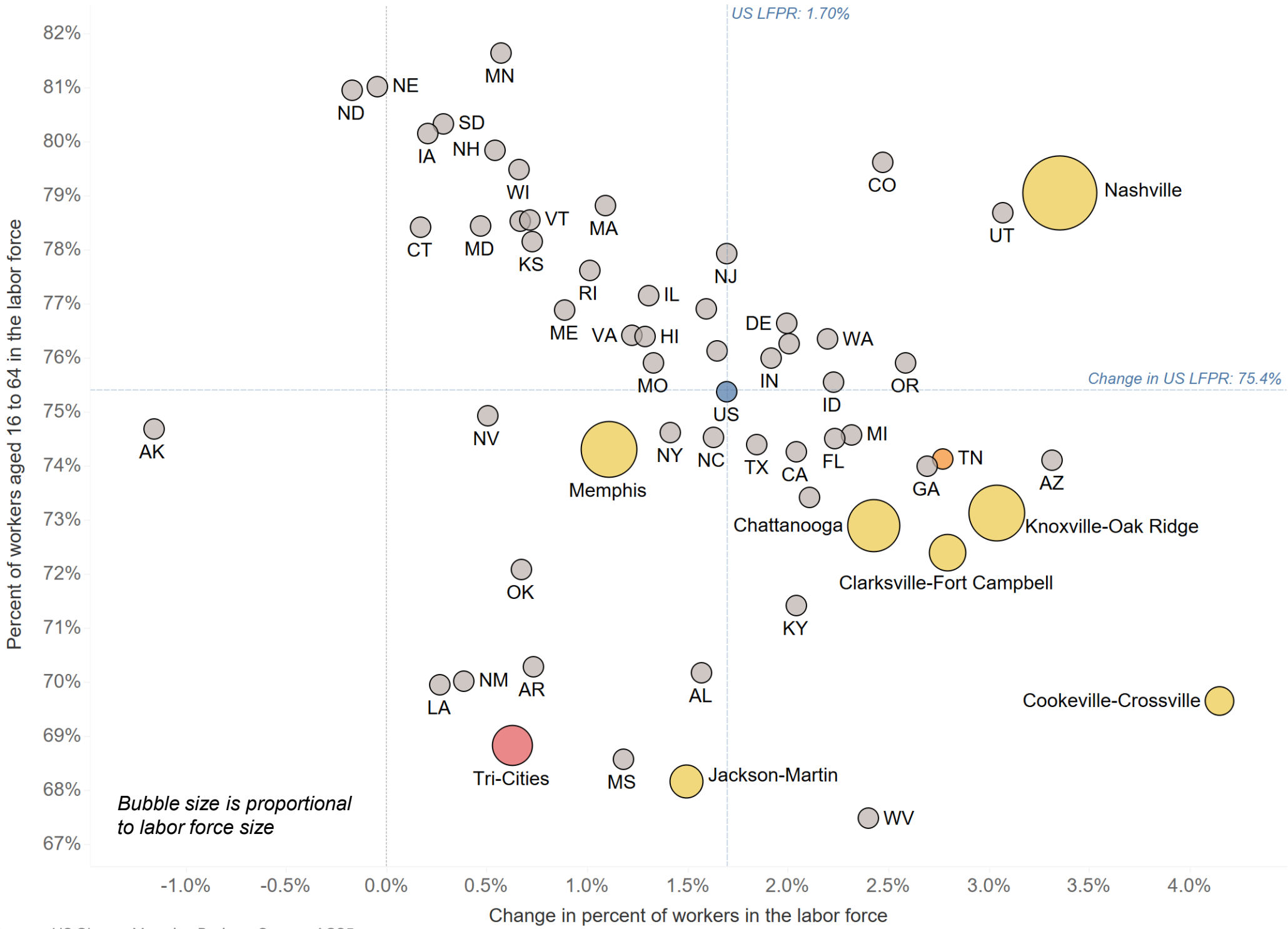


Labor Force Participation Rate - ages 16 to 64, 2024



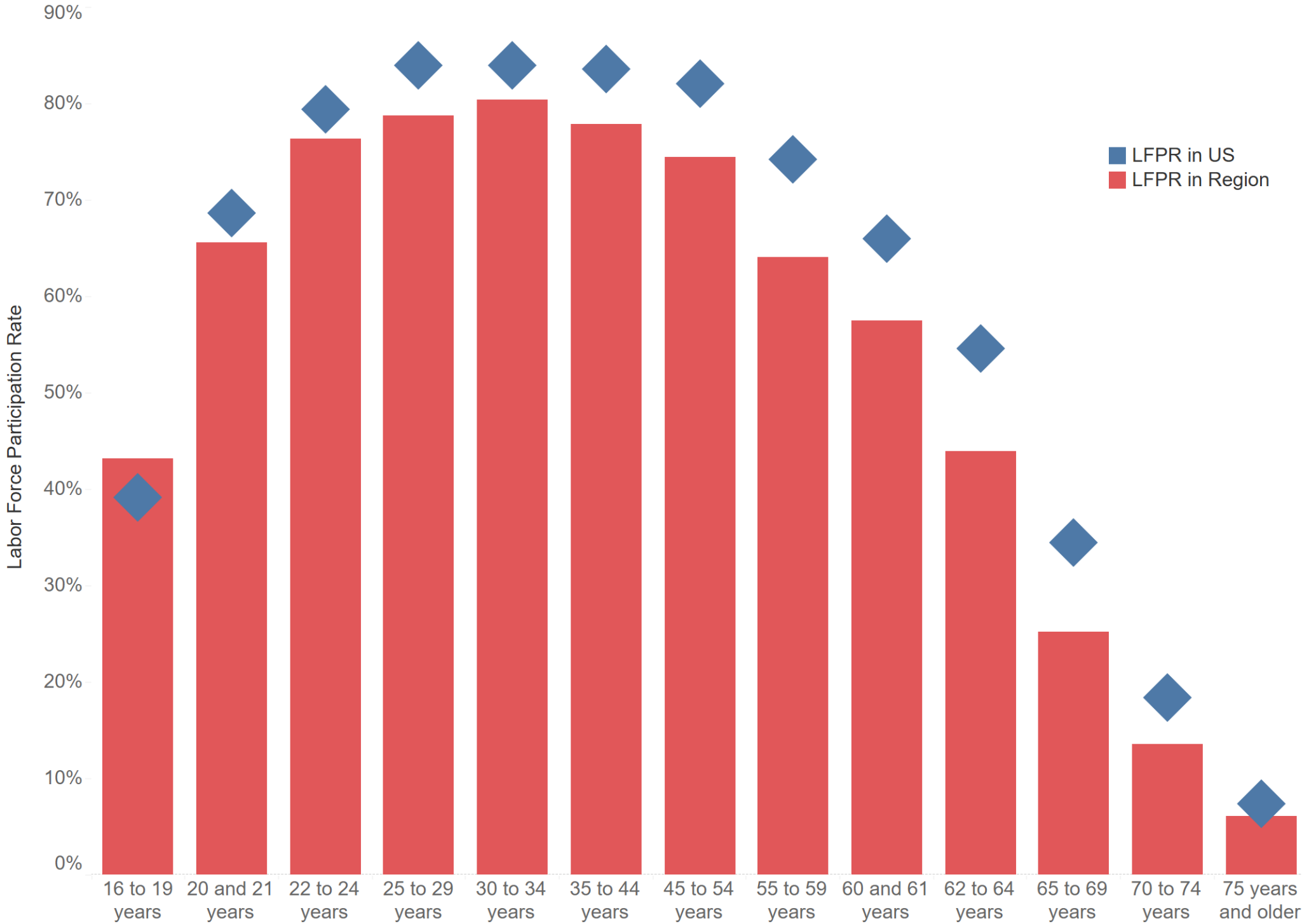
Source: US Cluster Mapping Project; Census ACS5

Labor Force Participation Rate - ages 16 to 64, 2014-2024



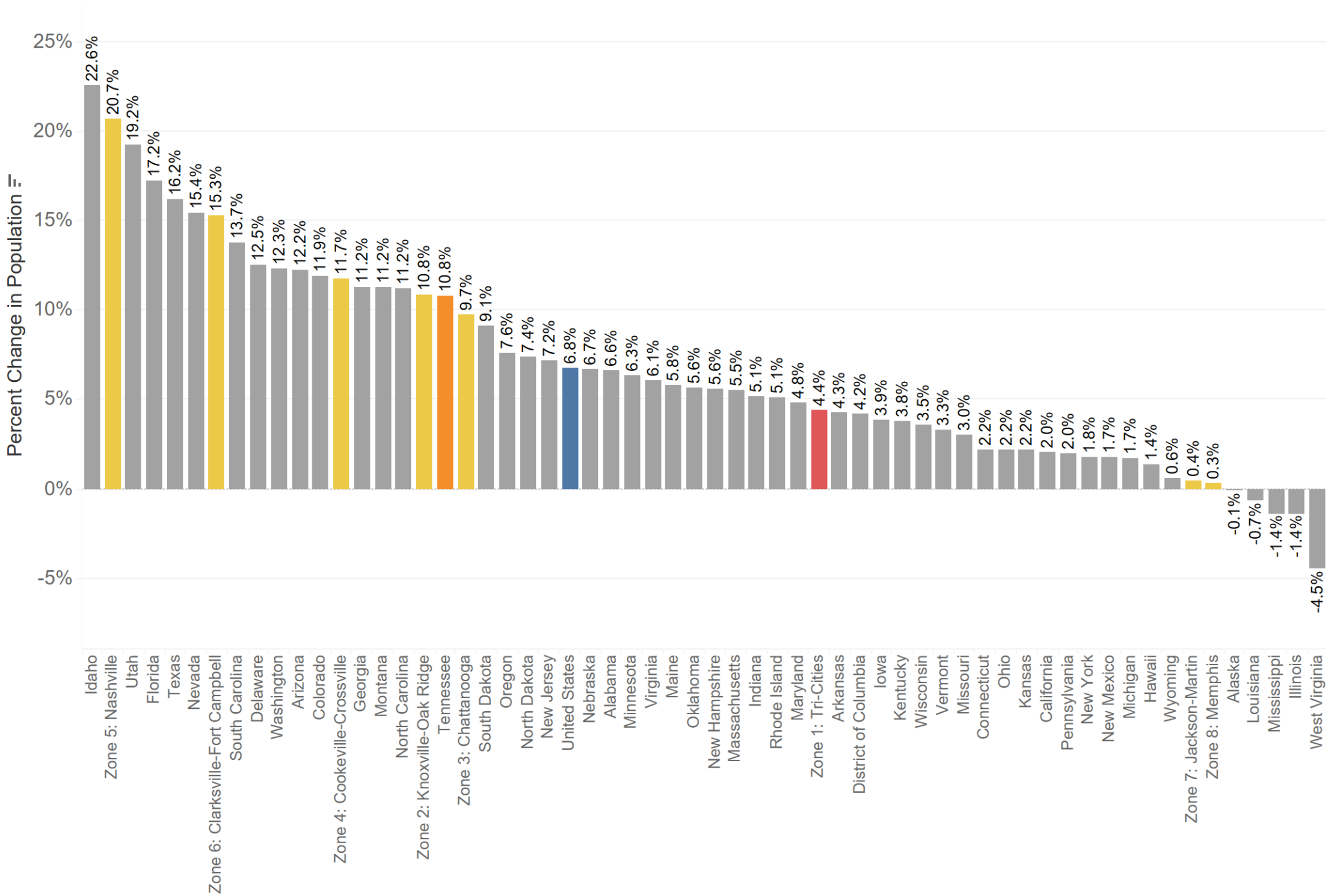
Source: US Cluster Mapping Project; Census ACS5

Tri-Cities: Labor Force Participation Rate by Age, 2024

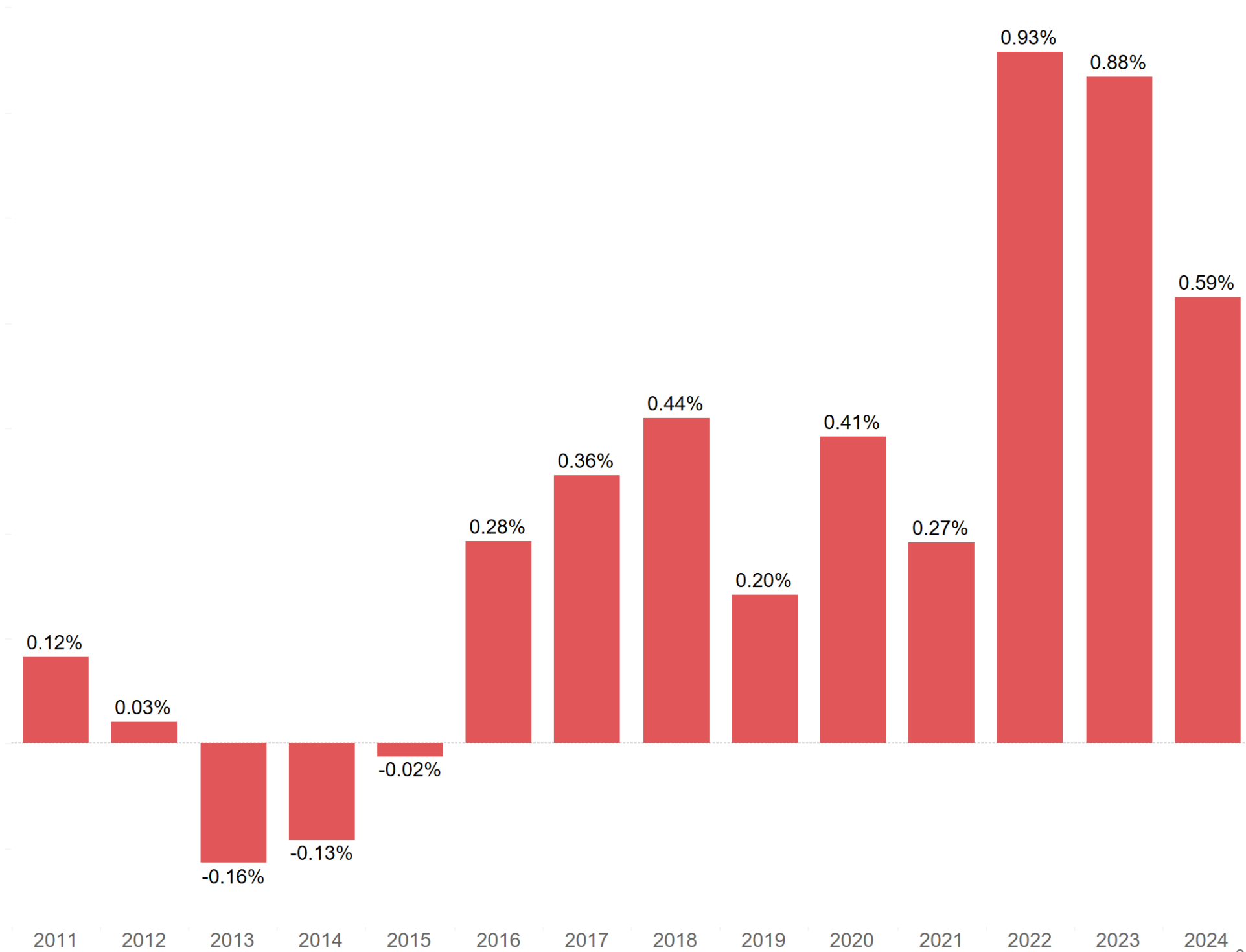


Source: US Cluster Mapping Project; Census ACS5

Population Percent Change, 2014-2024



Zone 1: Tri-Cities - Change in Population by Year



Source: US Cluster Mapping Project; Census ACS5

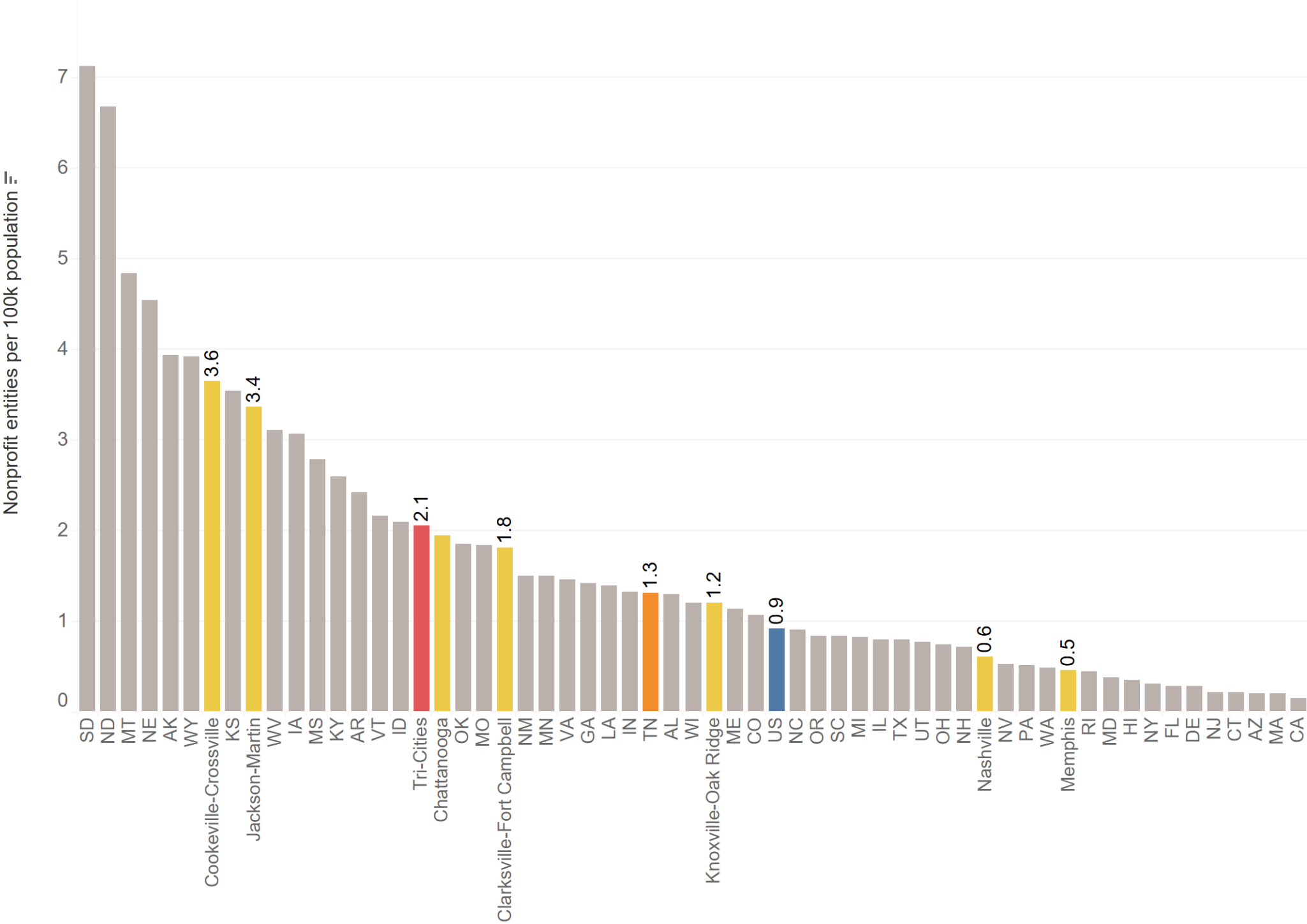
Unemployment Rate and Change, 2014-2024



Collaborative Governance

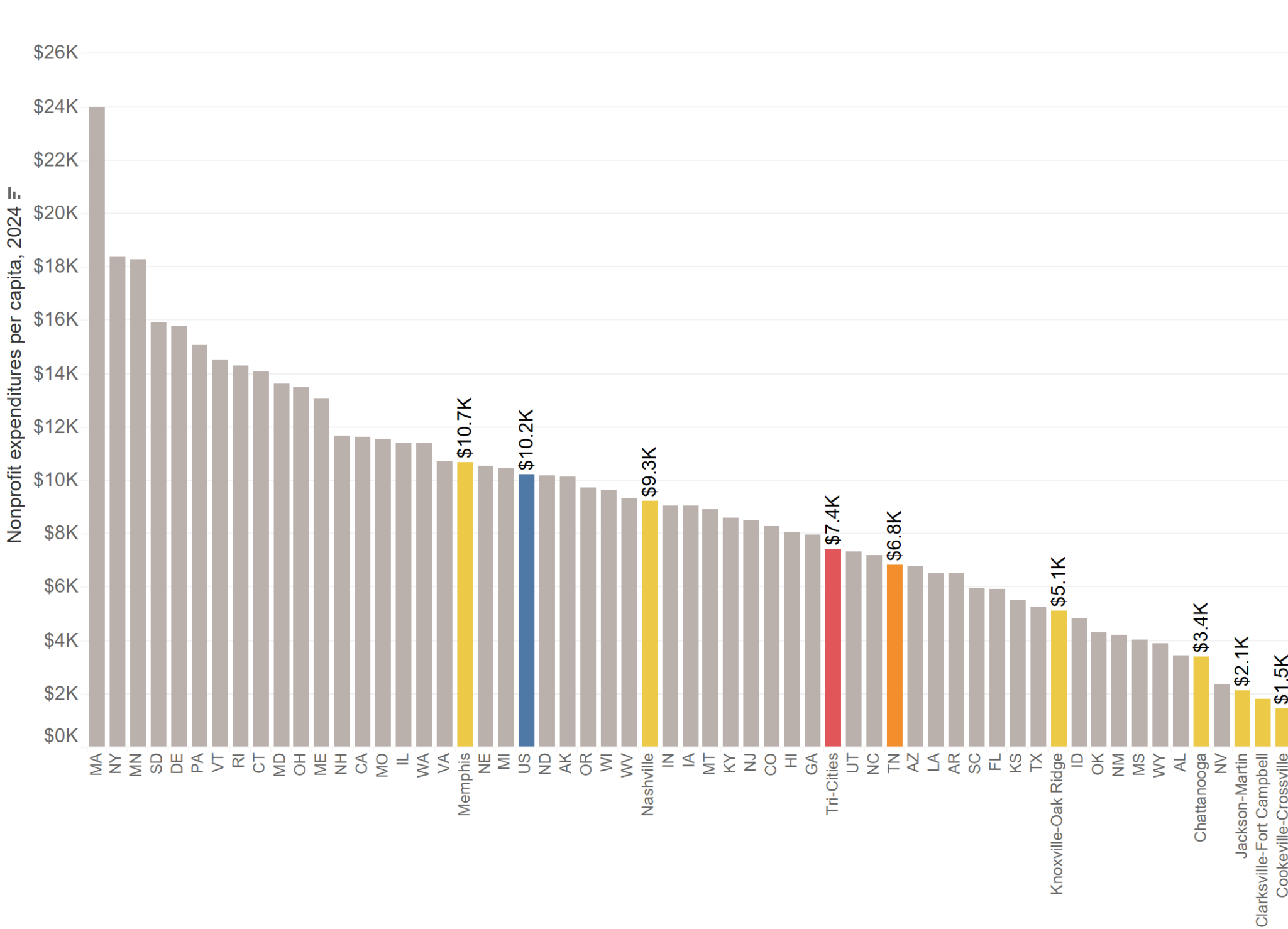
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Nonprofits per capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Nonprofit Expenditures per Capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Tri-Cities: Nonprofits by Expenditures, 2024

	Expenditures (\$)
SAMARITANS PURSE	1,037,513,821
MOUNTAIN STATES HEALTH ALLIANCE	957,777,045
WELLMONT HEALTH SYSTEM	813,767,456
EASTMAN CREDIT UNION	283,680,095
JOHNSTON MEMORIAL HOSPITAL INC	175,985,686
WELLMONT MEDICAL ASSOCIATES INC	140,419,987
TAKOMA REGIONAL HOSPITAL INC	104,261,724
HOLSTON ELECTRIC COOPERATIVE INC	101,432,047
BALLAD HEALTH	85,176,207
EMORY & HENRY UNIVERSITY	84,952,920
FRONTIER HEALTH	75,471,931
WELLMONT CARDIOLOGY SERVICES	75,426,297
MOUNTAIN ELECTRIC COOPERATIVE INC	69,545,506
MEDICAL EDUCATION ASSISTANCE CORPORATION	52,394,082
ASHE MEMORIAL HOSPITAL INC	48,746,175
MILLIGAN UNIVERSITY	47,523,885
SMYTH COUNTY COMMUNITY HOSPITAL	47,496,954
TUSCULUM UNIVERSITY	42,876,552
KING UNIVERSITY	40,883,680
APPALACHIAN REGIONAL MEDICALASSOCIATES INC	37,741,305
LEES-MCRAE COLLEGE INCORPORATED	37,296,436
RURAL HEALTH SERVICES CONSORTIUM INC	36,341,781
APPALACHIAN REGIONAL HEALTHCARE SYSTEM INC	35,367,411
APPALACHIAN MOUNTAIN PROJECT ACCESS	28,206,783
APPALACHIAN STATE UNIVERSITY FOUNDATION INC	26,568,594
UPPER EAST TENNESSEE HUMAN DEVELOPMENT A..	26,288,186
CROSSNORE COMMUNITIES FOR CHILDREN	25,671,872
SECOND HARVEST FOOD BANK OF NORTHEAST TE..	25,051,091
COMCARE INC	24,327,671
CONSUMER CREDIT UNION	22,167,798
HIGH COUNTRY COMMUNITY HEALTH	21,285,125
CHARLES A CANNON JR MEMORIAL HOSPITAL INC	19,682,646
SOUTHWEST VIRGINIA COMMUNITY HEALTH SYSTE..	18,763,110
BALLAD HEALTH FOUNDATION	18,711,967
PEOPLE INCORPORATED OF VIRGINIA	17,915,216

Excluding Heath Care and Education

	Expenditures (\$)
SAMARITANS PURSE	1,037,513,821
APPALACHIAN REGIONAL HEALTHCARE SY..	35,367,411
UPPER EAST TENNESSEE HUMAN DEVELO..	26,288,186
CROSSNORE COMMUNITIES FOR CHILDREN	25,671,872
SECOND HARVEST FOOD BANK OF NORTH..	25,051,091
COMCARE INC	24,327,671
EO COMPANIES	15,933,199
APPALACHIA SERVICE PROJECT INC	13,971,309
HOLSTON HOME FOR CHILDREN INC	13,919,009
WELLMONT WEXFORD HOUSE	13,142,889
CHRISTIAN MEDICAL & DENTAL SOCIETY	13,018,099
KINGSWAY CHARITIES INC	11,847,568
FIRST TENNESSEE HUMAN RESOURCE AG..	11,259,117
DAWN OF HOPE INC	8,766,532
COMPREHENSIVE COMMUNITY SERVICES I..	7,433,568
ISAIAH 117 HOUSE	7,311,224
PEOPLE INCORPORATED HOUSING GROUP	6,805,049
GREENE COUNTY SKILLS INC	6,621,282
BEECH MOUNTAIN CLUB	6,305,191
SOLUTIA RETIREE WELFARE TR 98-K079-00..	6,252,248
CORE SERVICES OF NORTHEAST TENNESS..	6,152,006
WATAUGA OPPORTUNITIES INC	5,810,351
ASHE SERVICES FOR AGING INC	5,779,194
COUNSELING AND CONSULTATION SERVIC..	5,575,607
WINE TO WATER	5,459,065
APPALACHIAN VOICES	5,136,988
FAIRVIEW HOUSING MANAGEMENT	5,097,140
COALITION FOR KIDS INC	5,008,828
FAMILIES FREE INC	4,970,280
HERITAGE FAMILY CEMETERY INC	4,369,040
SERVING ORPHANS WORLDWIDE INC	4,343,920
FIRST TENNESSEE DEVELOPMENT DISTRIC..	4,325,053
BLUE RIDGE CONSERVANCY	4,251,976
BIRTHPLACE OF COUNTRY MUSIC ALLIANCE	3,962,161
APPALACHIAN SUSTAINABLE DEVELOPME..	3,617,473

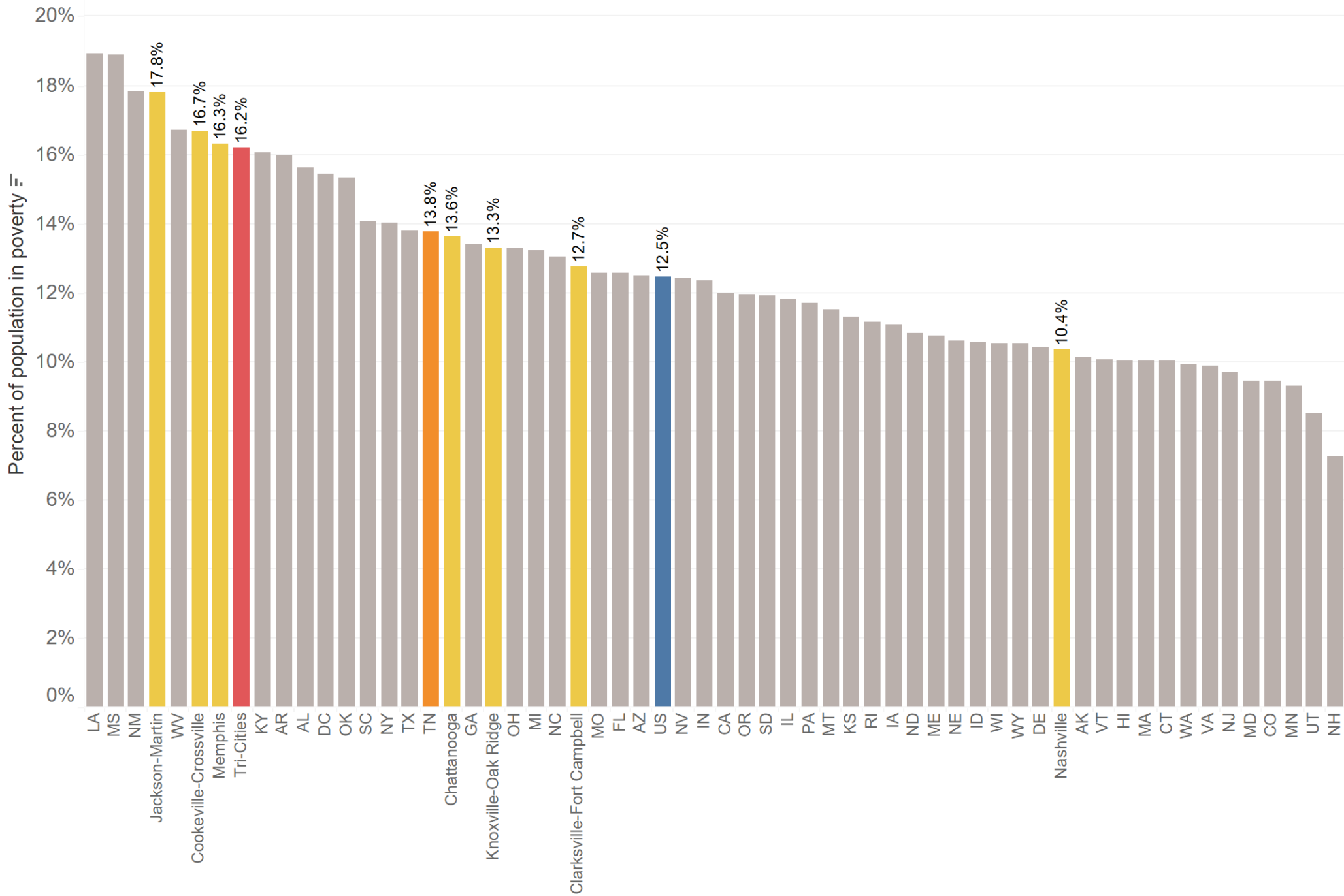
Tri-Cities: TLAP Collaborative Governance Regional Inventory

Initiative	Mission Summary	Lead Organization	Counties Covered
NETWORKS Sullivan Partnership <i>networkstn.com</i>	Align public, private, civic, and educational sectors to promote unified economic development, infrastructure, health, education, and equity initiatives across the region.	Sullivan Partnership	Carter, Greene, Hancock, Hawkins, Johnson, Sullivan, Unicoi, Washington (TN)
ETSU Innovation Lab & Northeast Tennessee STEM Innovation Hub <i>etsuresearchcorporation.org</i>	Build cross-sector innovation ecosystems by connecting education, business, entrepreneurship, and public institutions to support startups, STEM educators, and technology transfer.	East Tennessee State University (ETSU)	All 8 Northeast TN counties, plus adjacent counties in Kentucky and Virginia
Regional Coalition on Homelessness (ARCH) <i>archtn.org</i>	Govern and coordinate housing and social service solutions for individuals experiencing homelessness through multi-county Continuum of Care governance.	ARCH Continuum of Care	Carter, Greene, Hancock, Hawkins, Johnson, Sullivan, Unicoi, Washington (TN)
Northeast Tennessee Workforce Development Board <i>netnetworkforce.org</i>	Coordinate workforce training, labor market alignment, and planning across the region under an interlocal governance structure aligned with federal WIOA requirements.	Northeast TN Workforce Board (hosted at ETSU)	Carter, Greene, Hawkins, Johnson, Sullivan, Unicoi, Washington; Hancock via outreach
VetSASA Collective Impact Initiative	Launch cross-sector, veteran-led working groups to support recovery, housing, employment, and substance use treatment using a collective impact model with shared measurement and systems alignment.	ETSU Quillen School of Medicine + community health partners	Carter, Greene, Hancock, Hawkins, Johnson, Sullivan, Unicoi, Washington (TN)
Appalachian Development Highway System (Corridors B, F, and K) <i>arc.gov/transportation</i>	Coordinate cross-state infrastructure and economic development along federally designated corridors including the Cumberland Gap Tunnel (Corridor F) and U.S. Route 23 (Corridor B)	Appalachian Regional Commission (ARC) and participating state DOTs	Northeast TN ↔ Kentucky ↔ Virginia
ICPC Interstate Child Welfare Agreements <i>tn.gov/dcs</i>	Ensure cross-border child welfare and custodial placements through legally binding interstate agreements and coordinated agency practices.	Tennessee Department of Children's Services + ICPC regional partners	Tennessee, Kentucky, Virginia, North Carolina
Appalachian Regional Commission (ARC) Local Development Districts <i>arc.gov</i>	Promote community and economic development across Appalachia through shared funding, planning, and governance spanning multiple states and sectors.	Appalachian Regional Commission (ARC)	Tennessee, Kentucky, Virginia, North Carolina counties in the Appalachian region
Tri-State Commercialization and Workforce Collaboratives	Align regional innovation, entrepreneurship, and workforce development strategies across Appalachian counties in three or more states.	Various (ARC-sponsored initiatives, regional alliances)	Tennessee, Kentucky, Virginia (select North Carolina counties)

Quality of Life

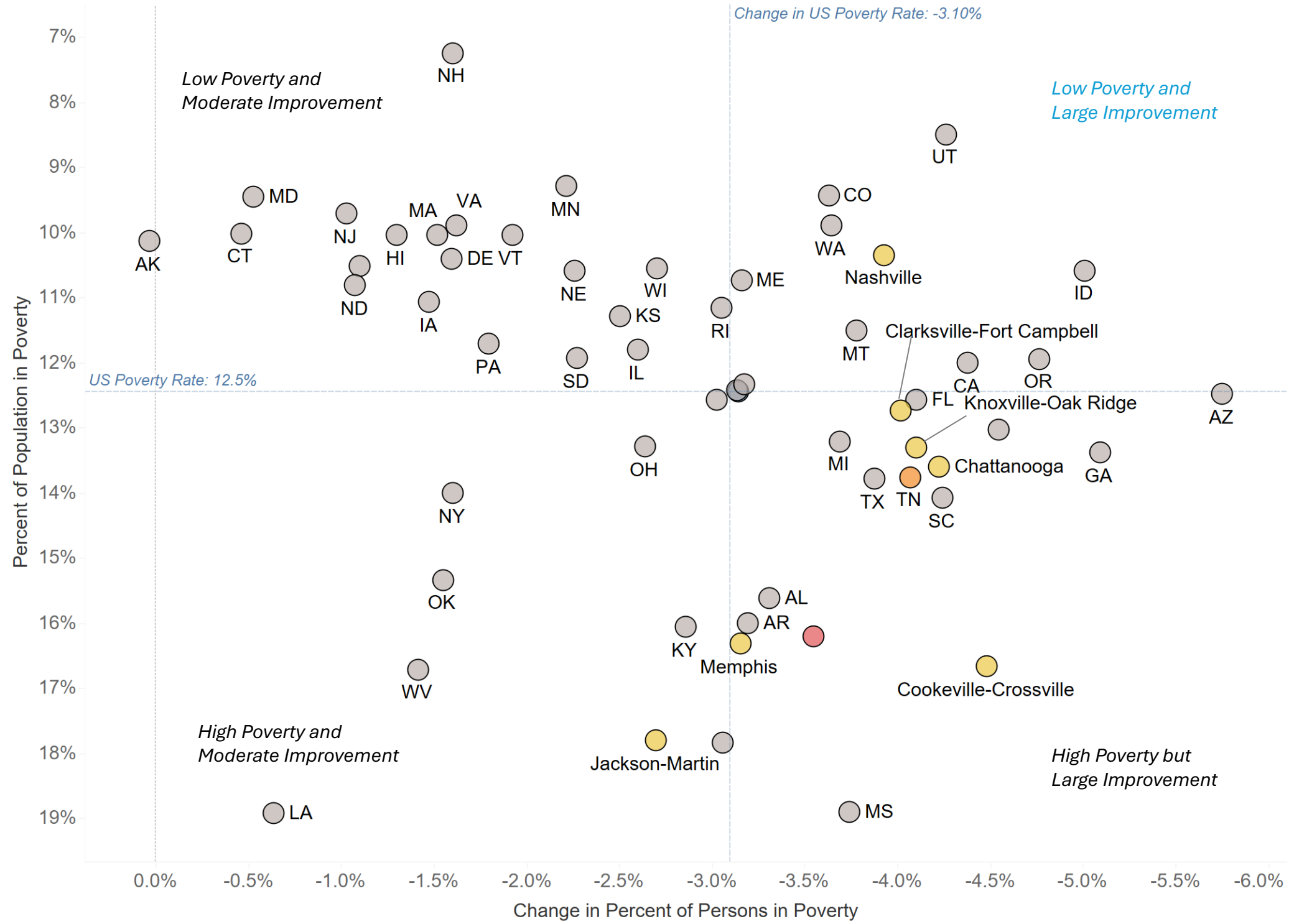
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Poverty Rate, 2024



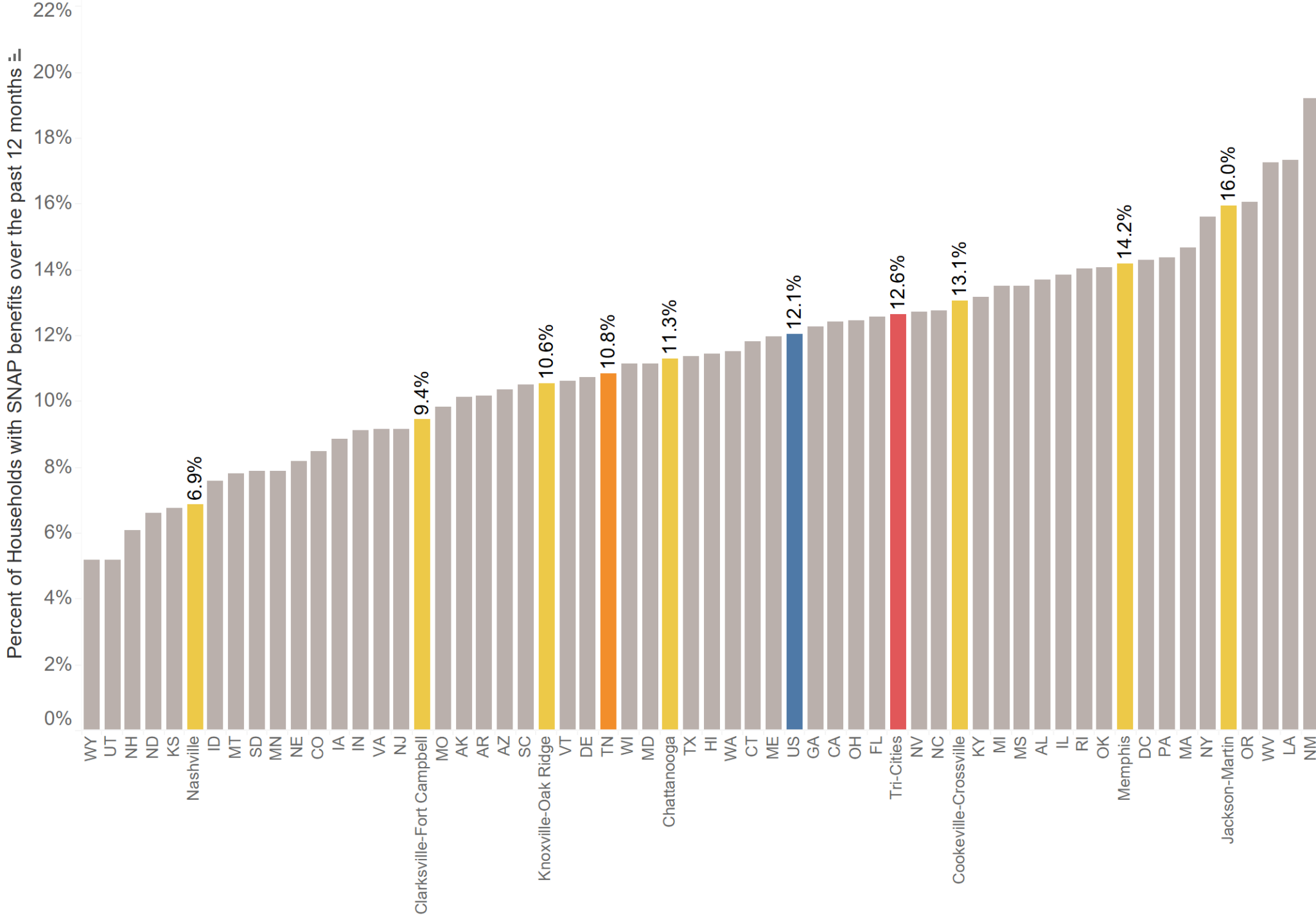
Source: US Cluster Mapping Project; ACS5

Poverty Rate, 2014-2024



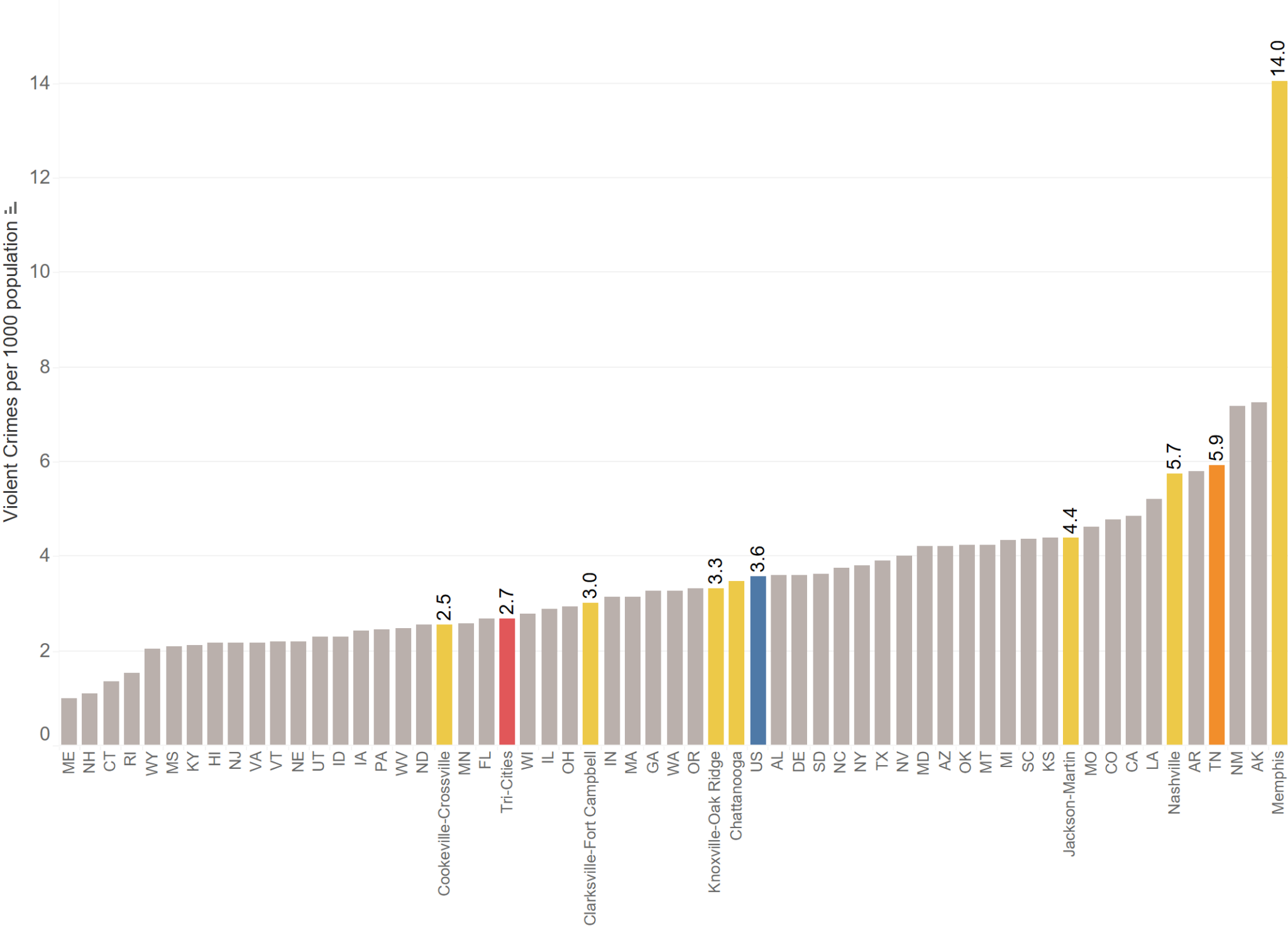
Source: US Cluster Mapping Project; ACS5

Households Receiving SNAP Benefits, 2024



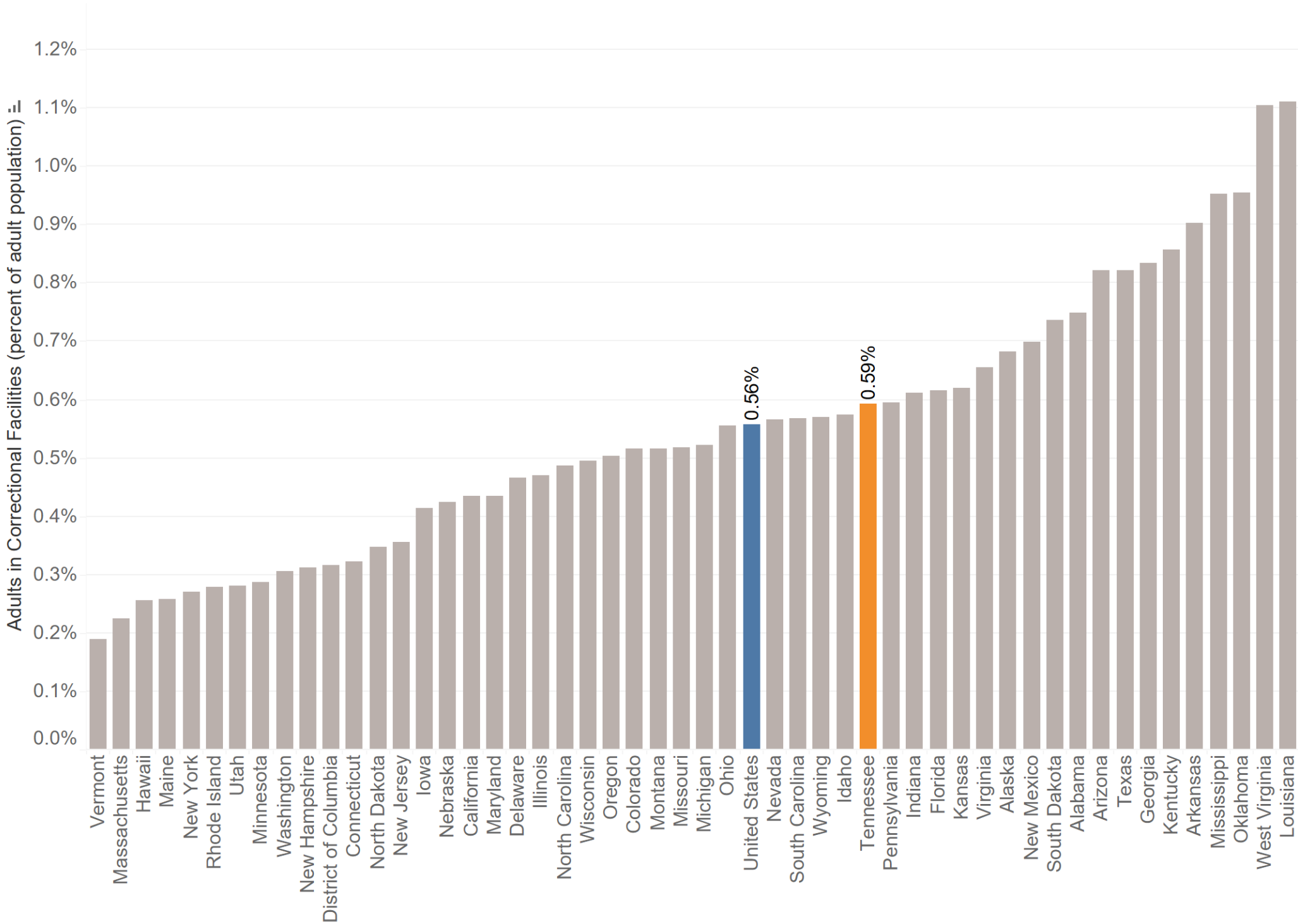
Source: US Cluster Mapping Project; Census ACS5

Violent Crime Rate, 2024



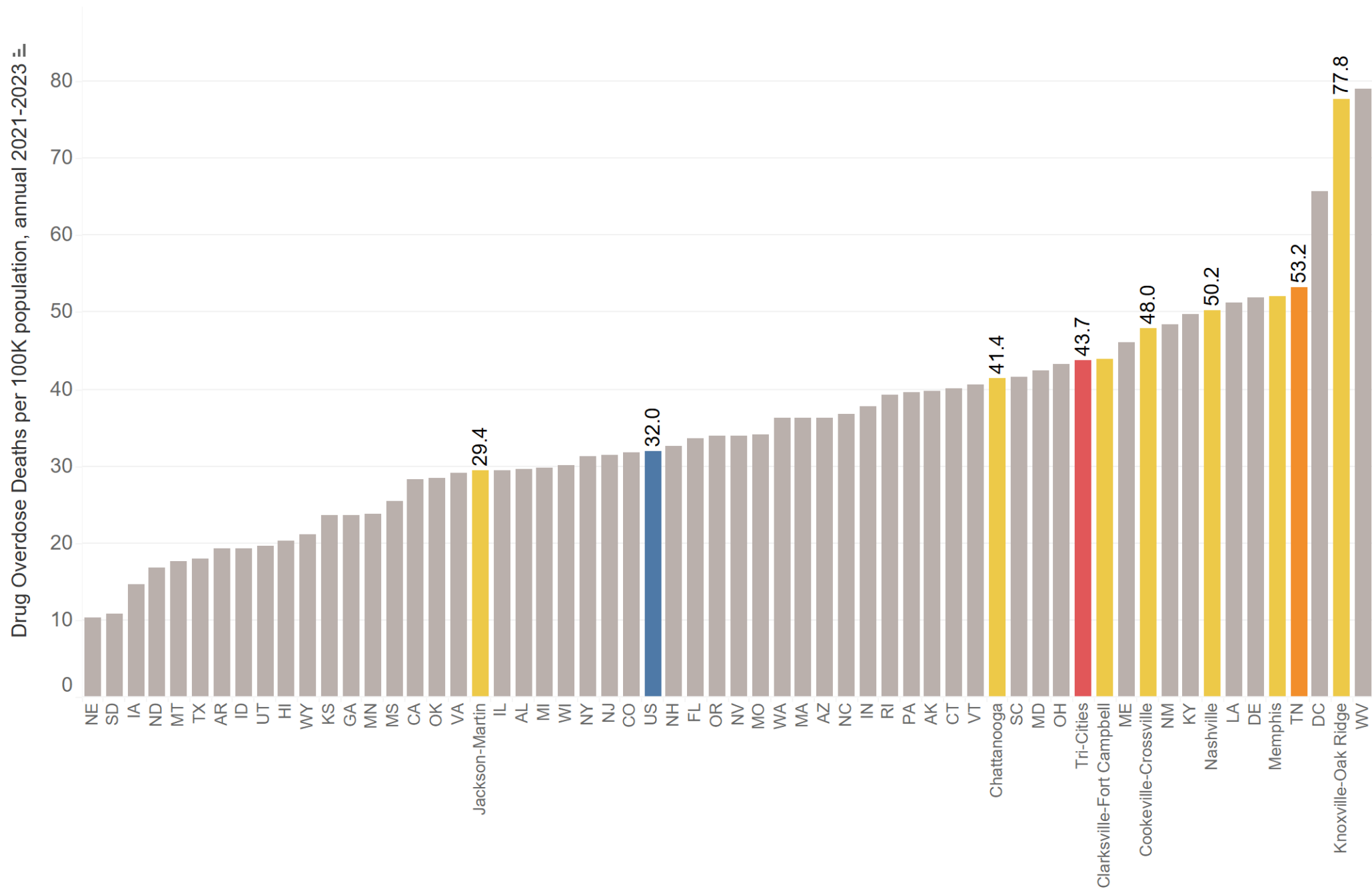
Source: US Cluster Mapping Project; FBI

Adults in Correctional Facilities, 2024

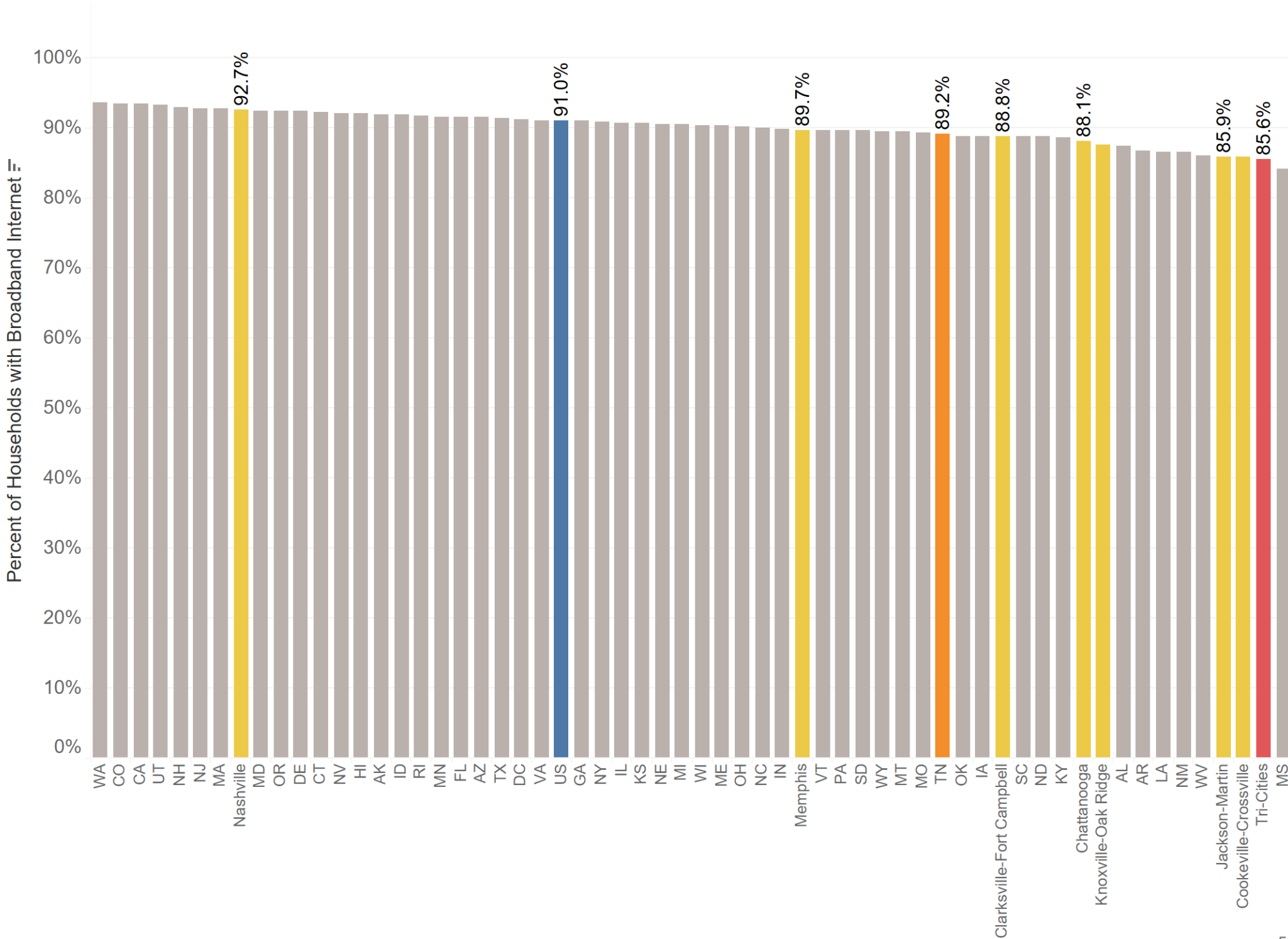


Source: US Cluster Mapping Project; EIA SEDS

Drug Overdose Deaths per 100k Population average annual 2021-2023

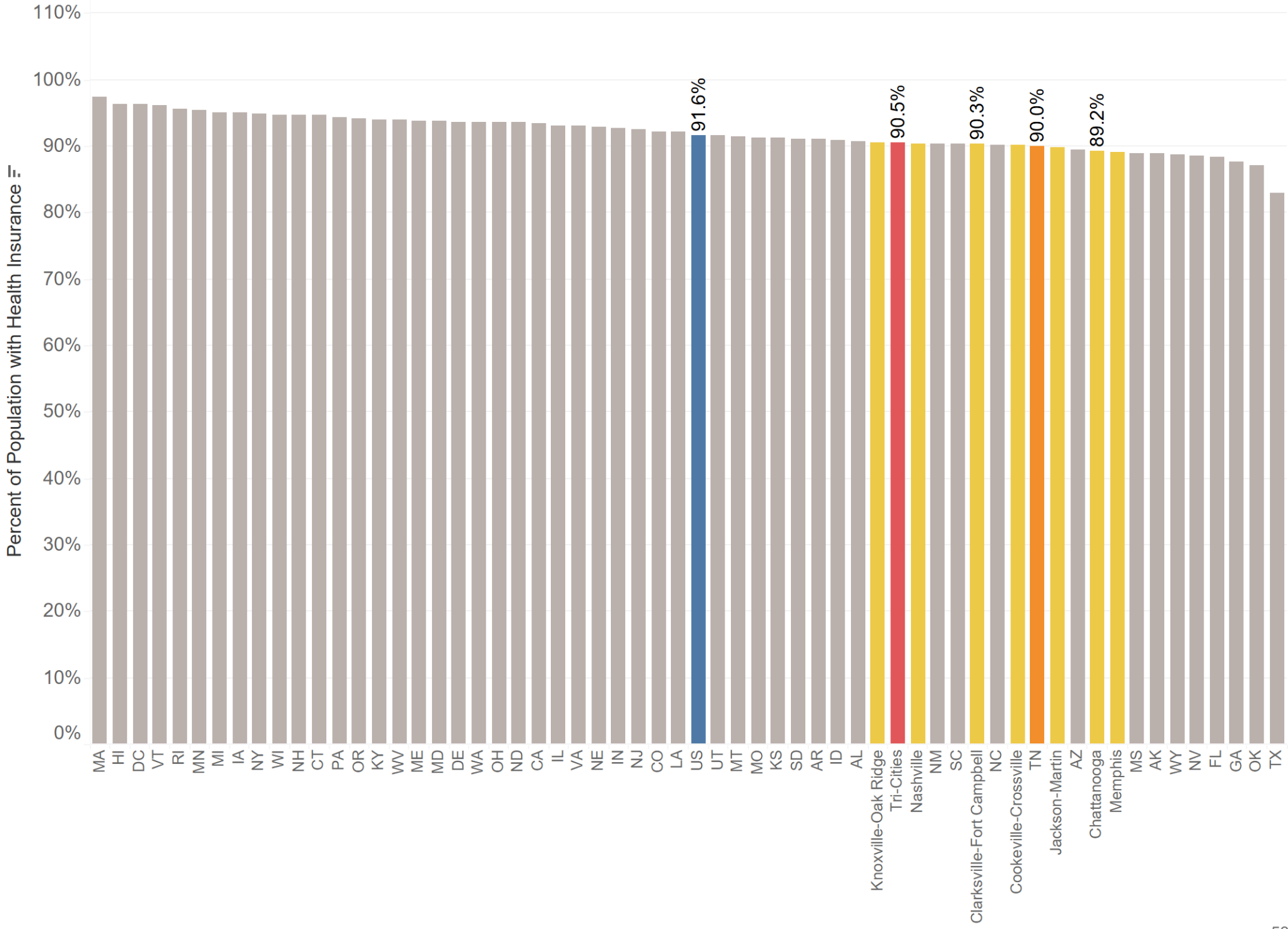


Broadband Adoption, 2024



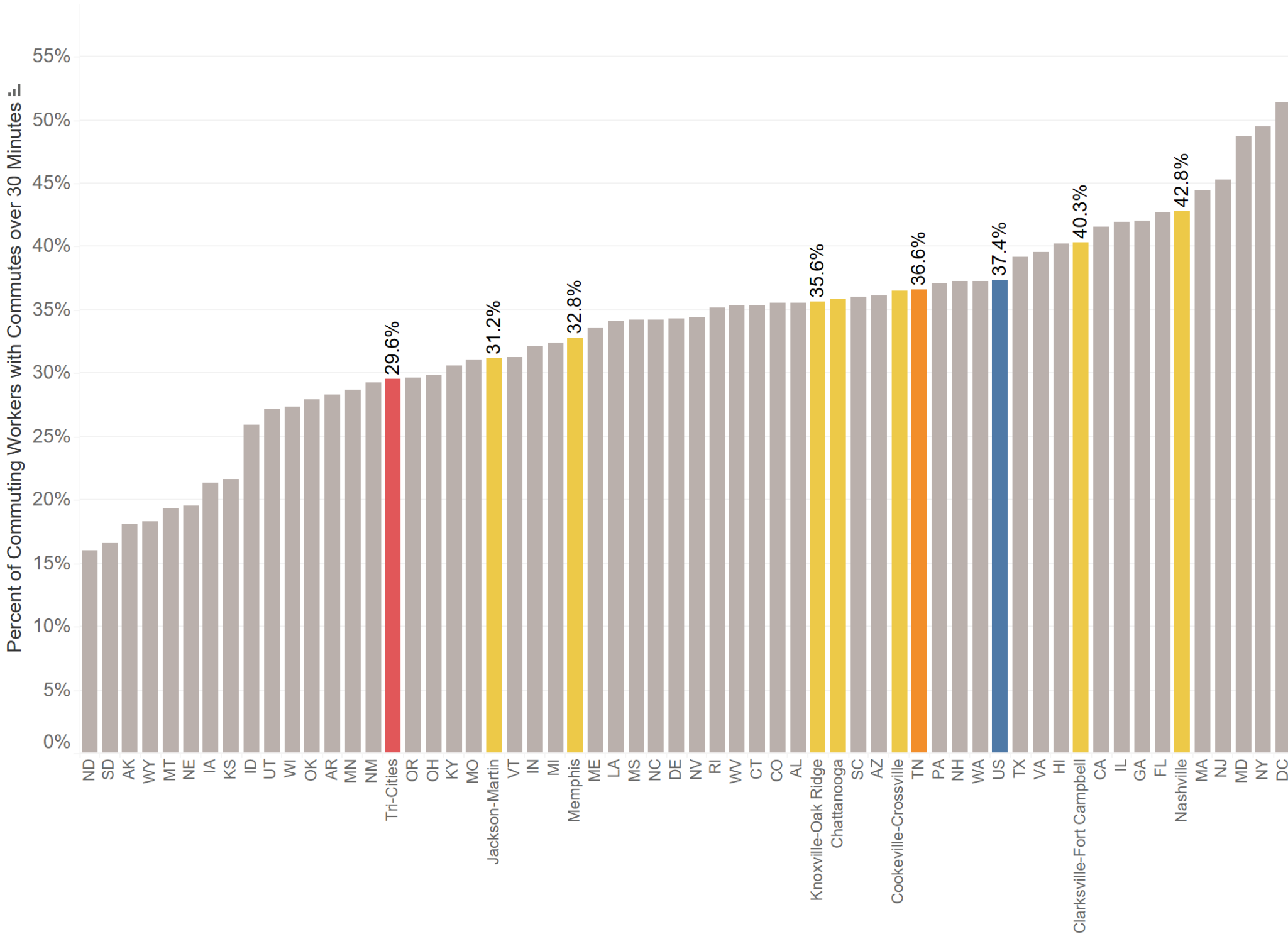
Source: US Cluster Mapping Project; Census ACS5

Health Insurance Coverage Rate, 2024



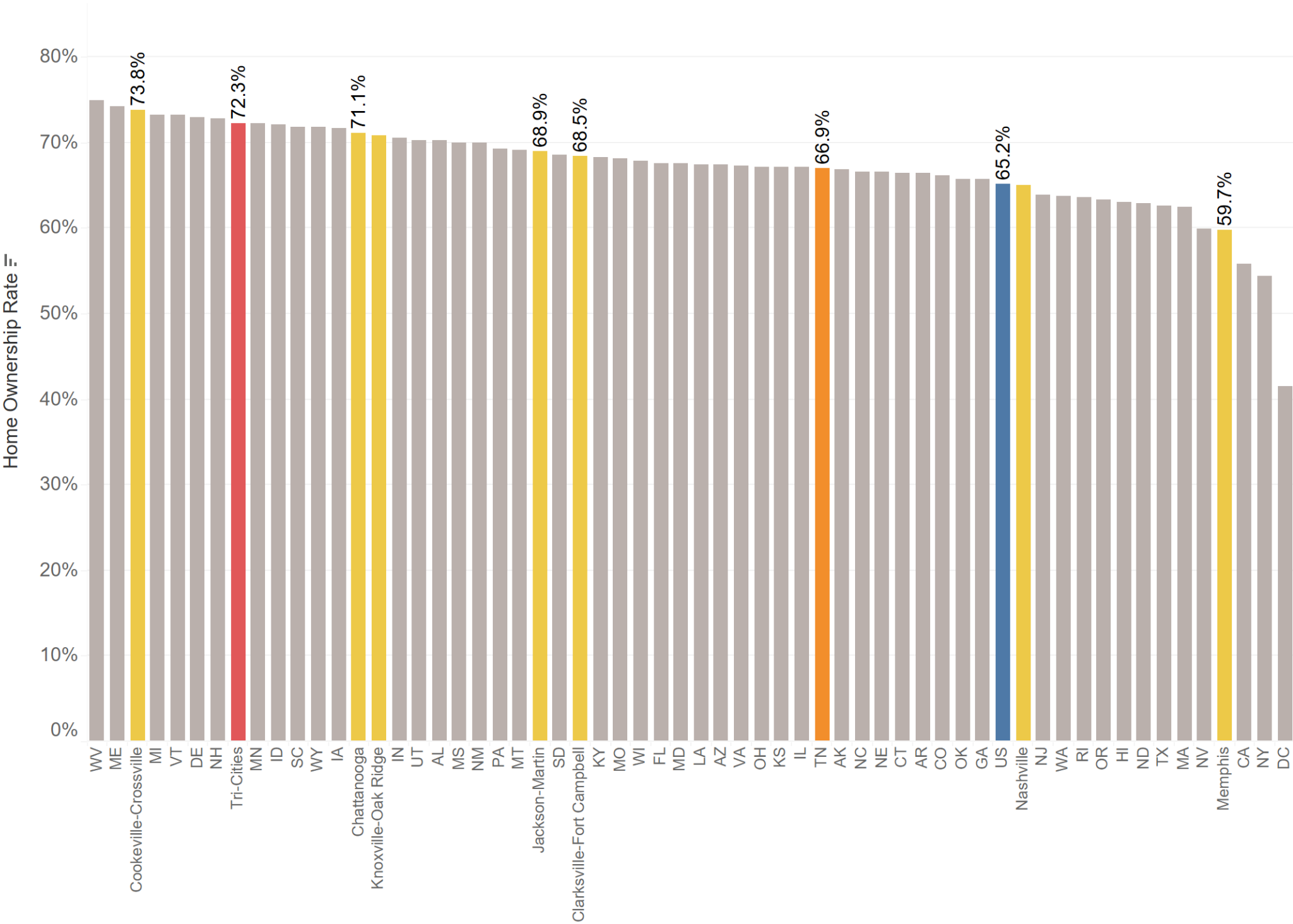
Source: US Cluster Mapping Project; Census ACS5

Percent of Workers with Long Commutes, 2024



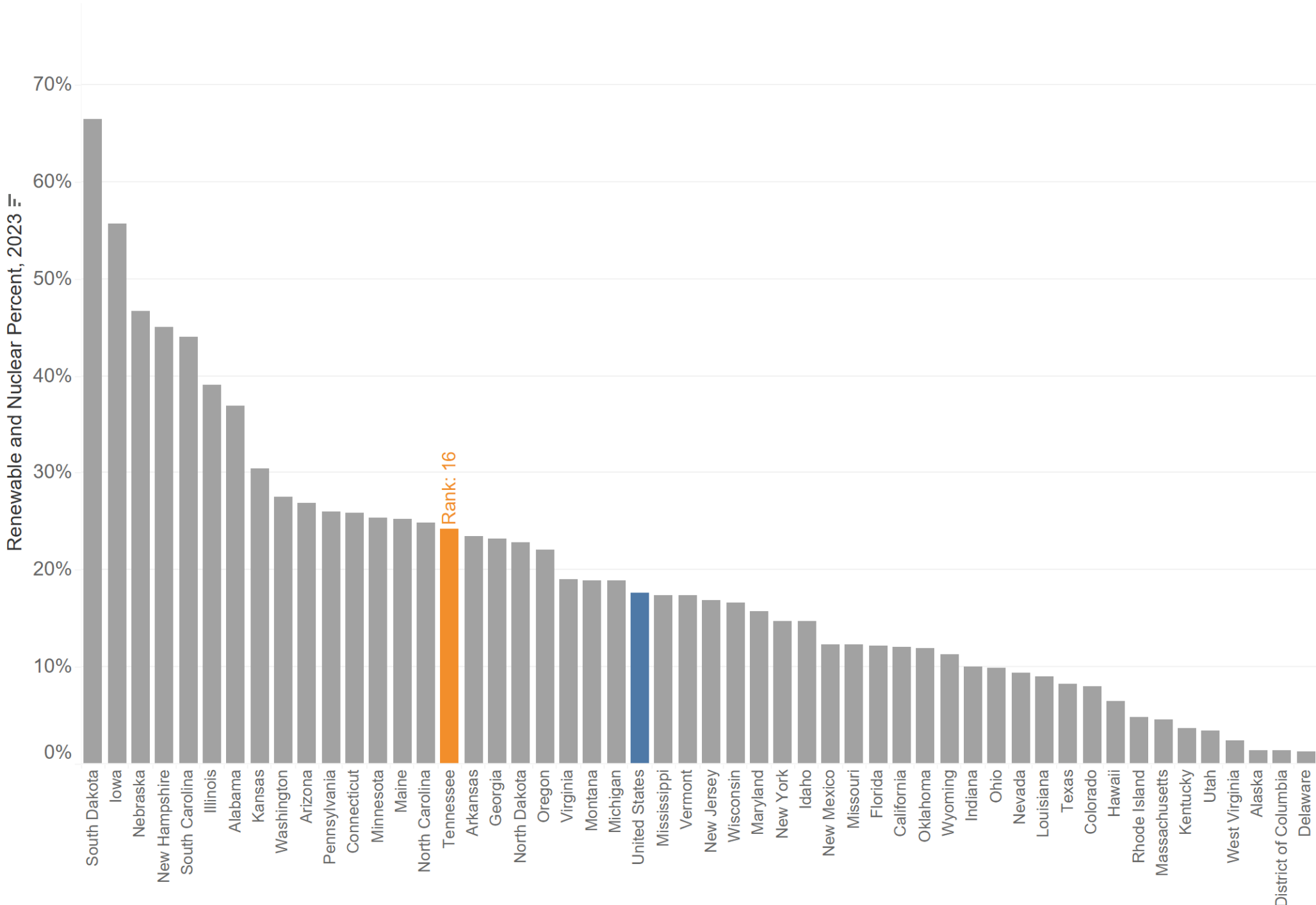
Source: US Cluster Mapping Project; Census ACS5

Home Ownership Rate, 2024



Source: US Cluster Mapping Project; Census ACS5

Renewable and Nuclear Energy Production as a Percent of Consumption, 2023



Source: US Cluster Mapping Project; EIA SEDS

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