Fay-Penn EDC

Business Attraction Strategy: Identifying Target Industries

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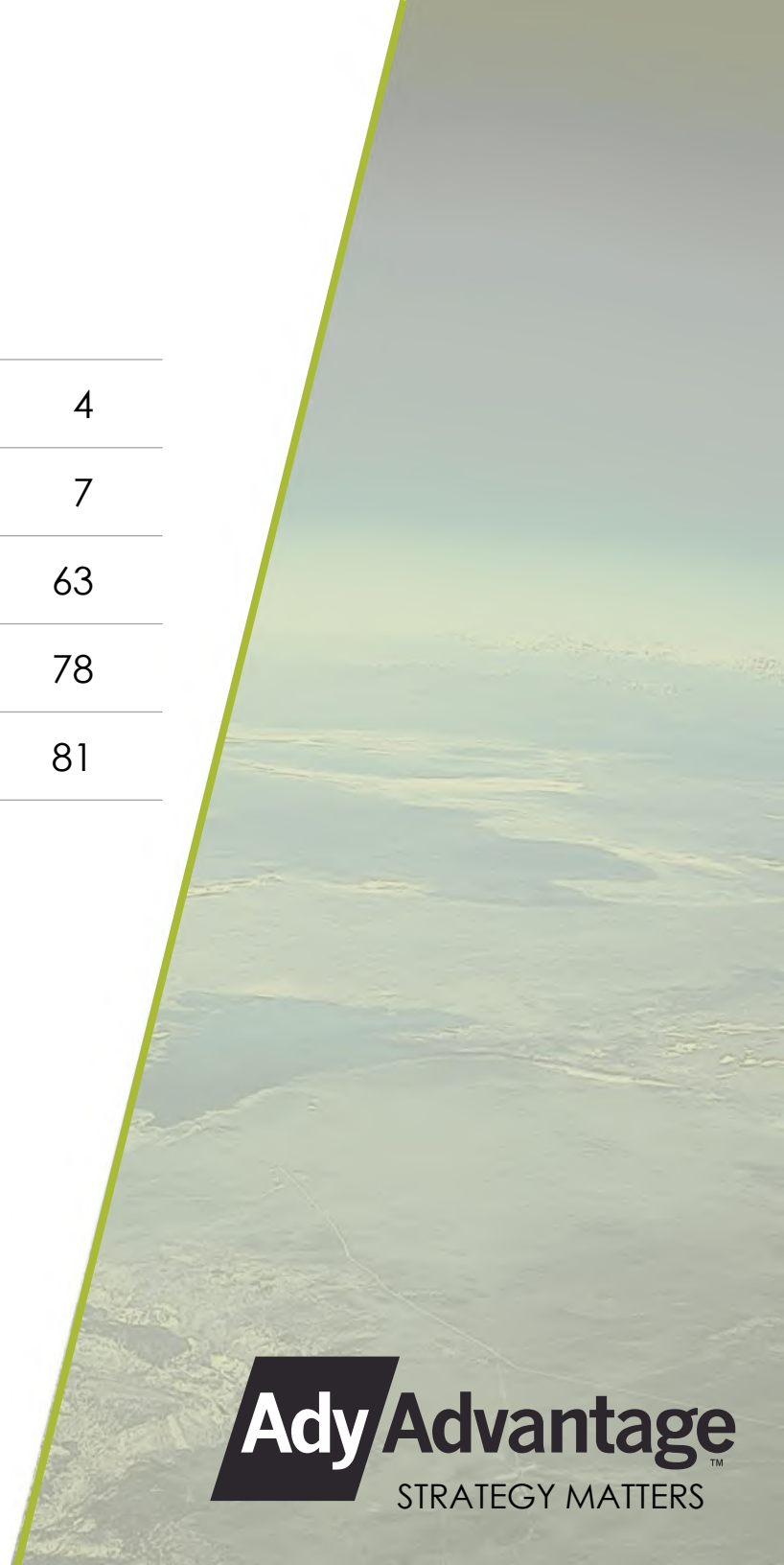

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Section 1: Introduction

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Introduction

OUR PROJECT UNDERSTANDING

Fayette County, located in southwest Pennsylvania, has a population of roughly 136,000 people and is part of the Pittsburgh MSA. The county is positioned within a 500-mile radius of half of the US population.

The region is home to Penn State Fayette, a four-year degree granting branch of Penn State University. Within a reasonable drive are Pittsburgh University, Carnegie Mellon University, West Virginia University, and other technical schools. The county has a number of industrial parks in varying stages of readiness.

Fay- Penn Economic Development Council assists the county in growing and diversifying the economy. It has a number of incentives to help new and expanding businesses in the county. Fay-Penn is looking to grow existing businesses and attract new businesses to the area.

OBJECTIVES

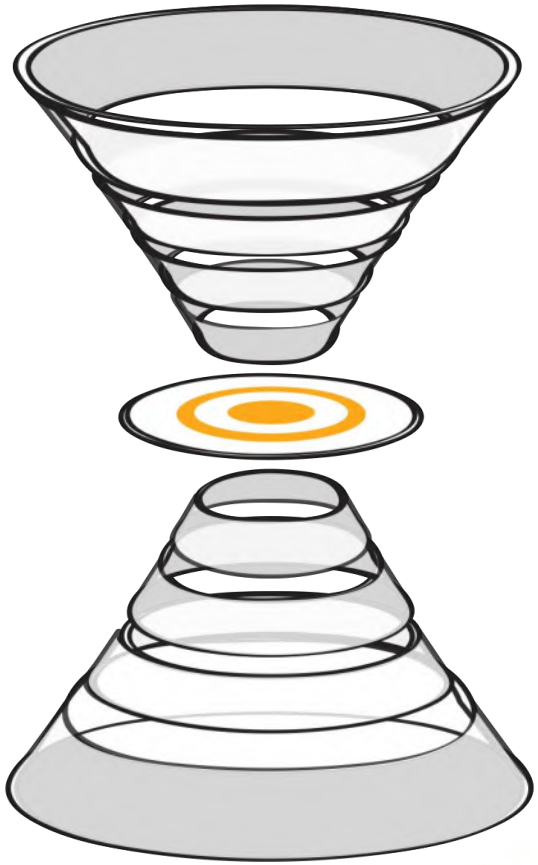
The objectives of this project are to:

- Gain a clear and objective understanding of Fayette County's economic assets.
- Recommend target industries on which to focus business recruitment activities.

Introduction

Ady Advantage Approach

Our approach starts with discovering the assets of Fayette County. In this phase, we will identify the current business and labor composition through research and gain insight into business needs and opportunities through interviews with existing companies and other community stakeholders. We will also conduct a Target Industry Analysis to identify the best industries to target for the county.



PHASE 1: DISCOVER

- Project Kickoff Teleconference
- Desk Research/Economic Base Analysis
- Site Visit and Stakeholder Interviews
- Target Industry Analysis
- Initial Report

PHASE 2: DISTILL

- SWOT Analysis (optional)

PHASE 3: DO

- Branding and Marketing Strategy (optional)
- Site Selection Training and Mock RFI exercise (optional)
- Lead Generation (optional)

Section 2: Economic Climate Assessment

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Economic Climate Assessment

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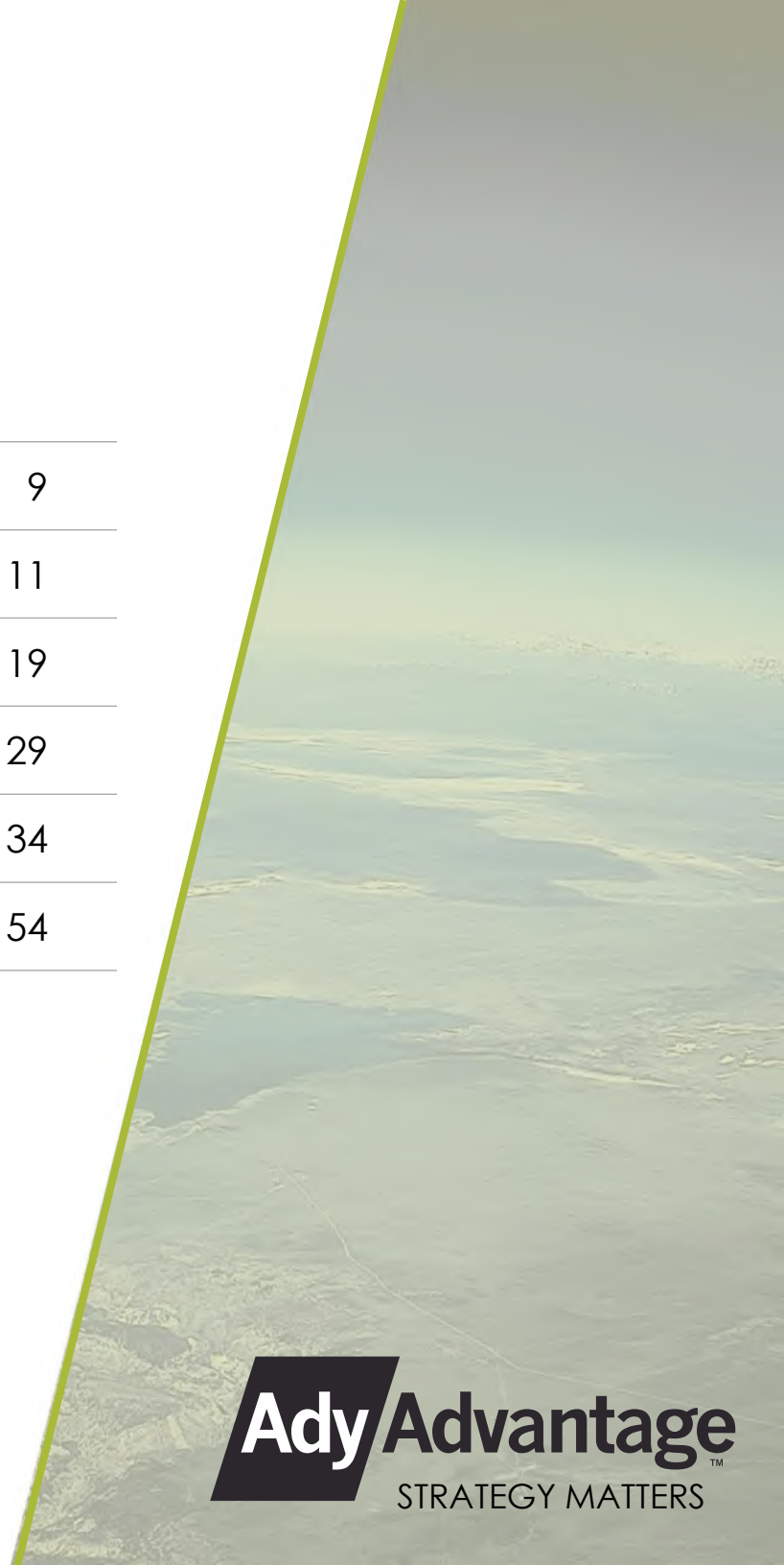

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Introduction

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Introduction

The following section provides an overview of the opportunities and barriers to growth in Fayette County and the region. The data included throughout this section mirrors the key location criteria that may factor into the decision-making processes a site selector, company and/or talent may be looking into before deciding to locate in your community. This includes information on demographics, economics, education and quality of life. All data included in this section is secondary research available from public sources, as well as from Emsi. This section also includes a cataloguing of assets throughout the region and key insights and takeaways from the virtual windshield tour and stakeholder input.

This is not meant to be an exhaustive analysis of these location criteria factors, but simply provide a baseline starting point for understanding how your community will be perceived by those outside of it without a boots-on-the-ground perspective. It is important to be aware of this data and use it to build your best business case possible.

For this analysis, we have compared the Fayette County, PA data to the following peer regions:

- Greene County, PA
- Somerset County, PA
- Pike County, KY
- Belmont County, OH
- Pittsburgh MSA

For some data points, we also compared Pennsylvania state-level data to West Virginia, Ohio, and Virginia to see where the state may have competitive advantages.

Demographics

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Demographics

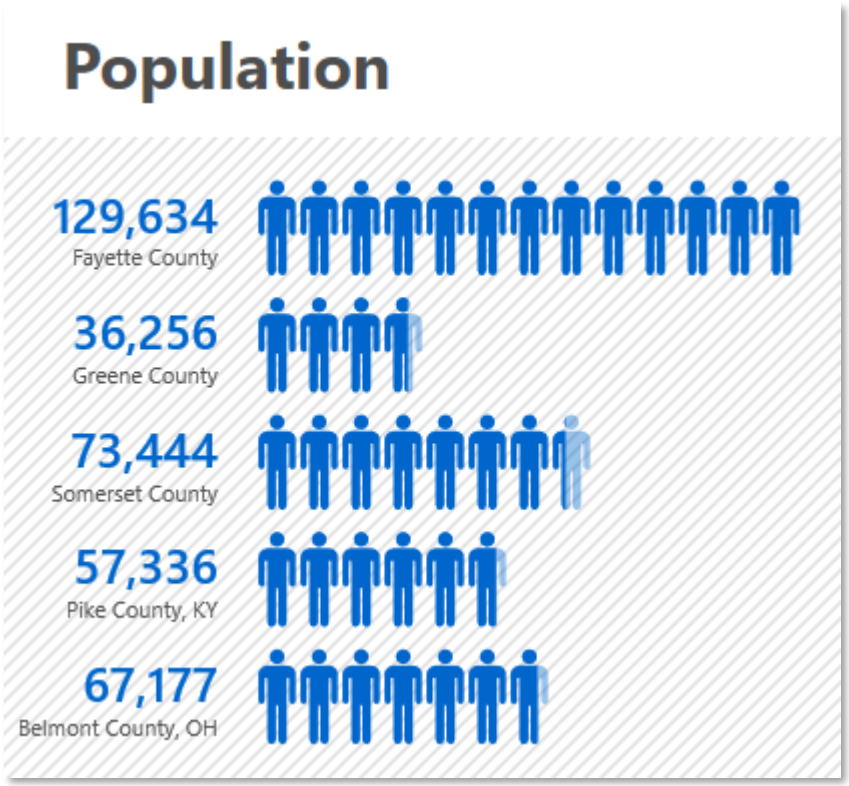
KEY TAKEAWAYS

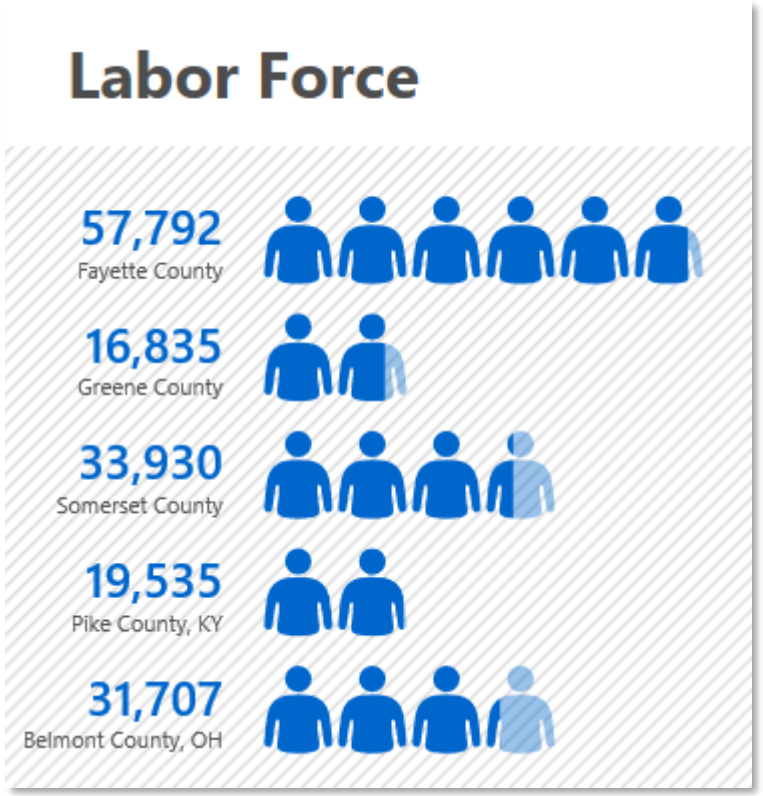
- Fayette County has a population of just over 129,000 people and it is included in the Pittsburgh, Pennsylvania metropolitan statistical area (MSA), which is home to about 2.3 million people. The county has seen a decline in population since 2000, but steady levels of labor force during the same period.

- The county and the MSA are pretty similar in terms of population age breakdowns, with the county being slightly older than the MSA, as well as most other comparison regions. The county has the highest percentage of people at age 45 or older compared to all other regions included in the analysis.

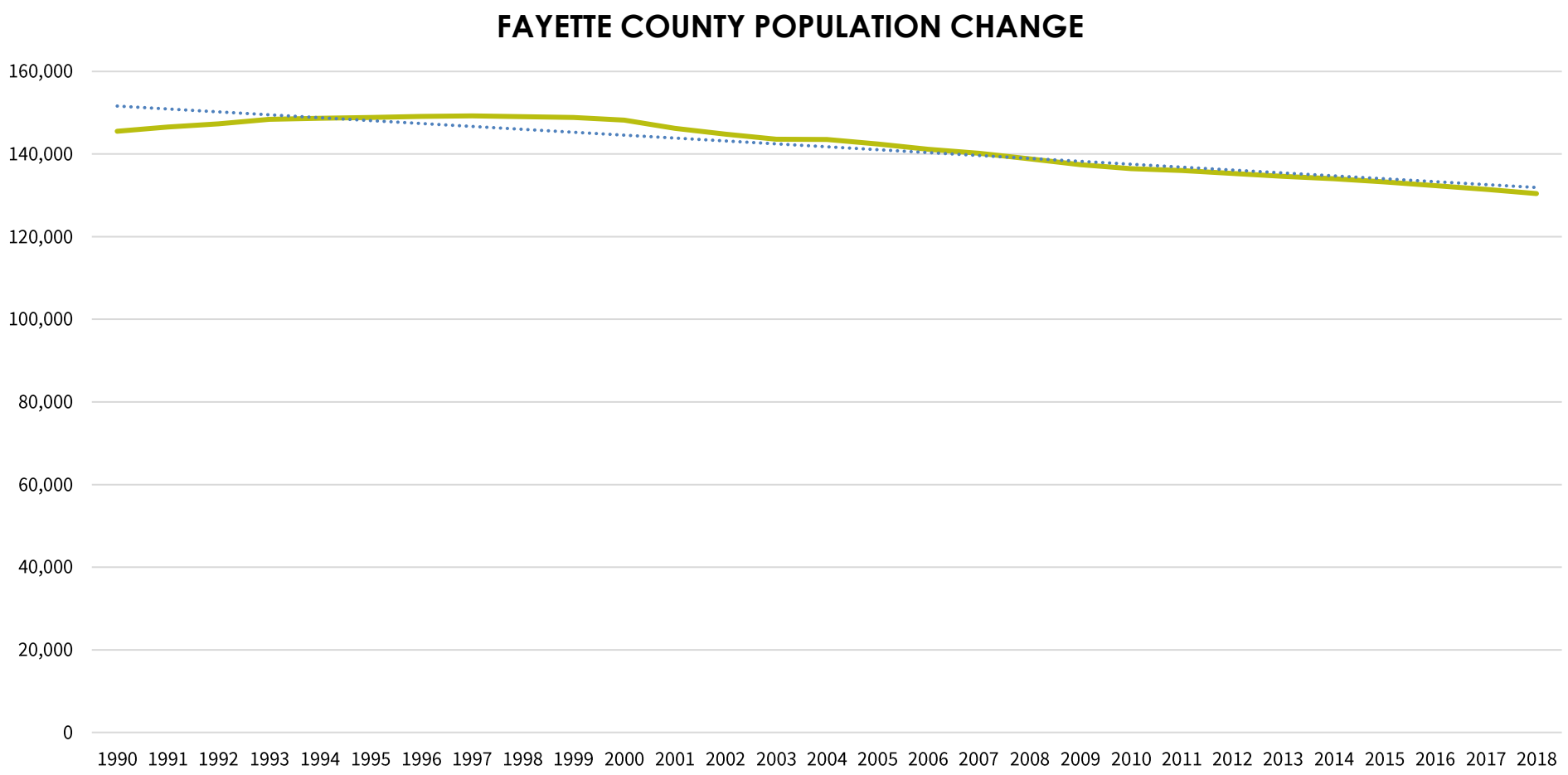
- Median household income in the county is slightly below average compared to the national average as well as the comparison regions. The county also has an above average poverty rate, which includes being higher than the Pittsburgh MSA, which it is a part of.

Demographics





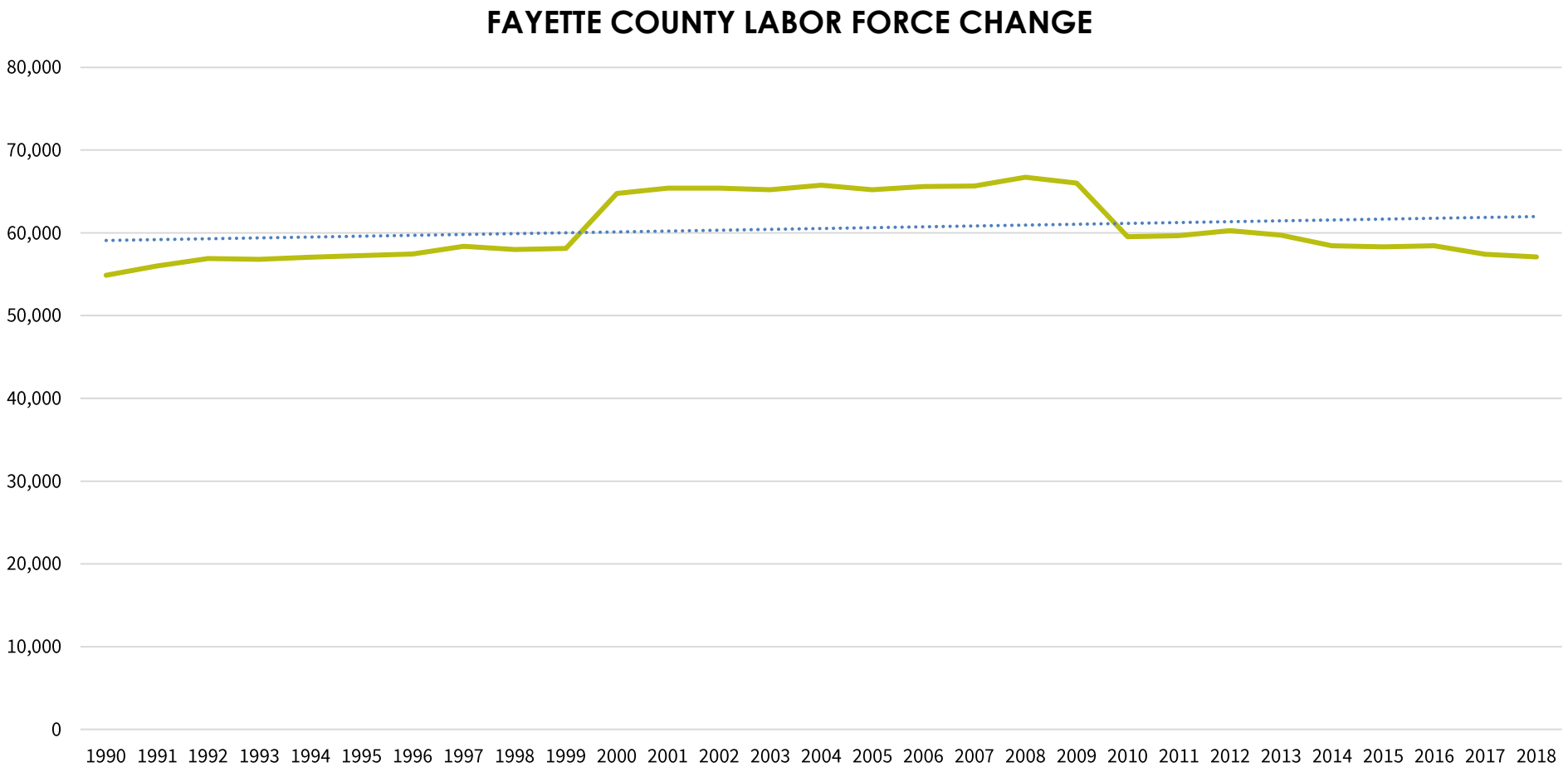
Demographics



Green Line = Actual change over time
Dotted Line = Average trend over time

Source: U.S. Census Bureau, 2020

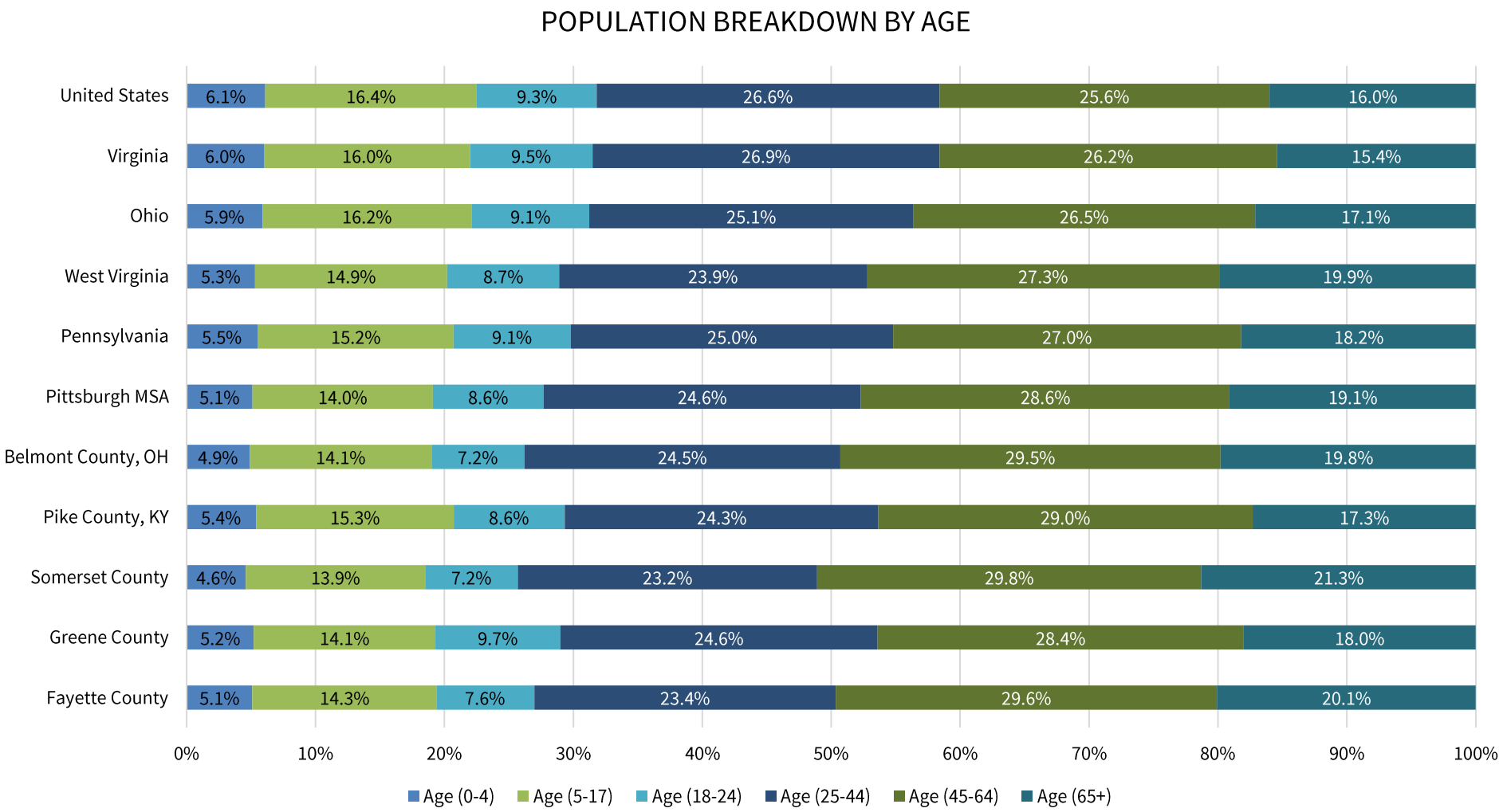
Demographics



Green Line = Actual change over time
Dotted Line = Average trend over time

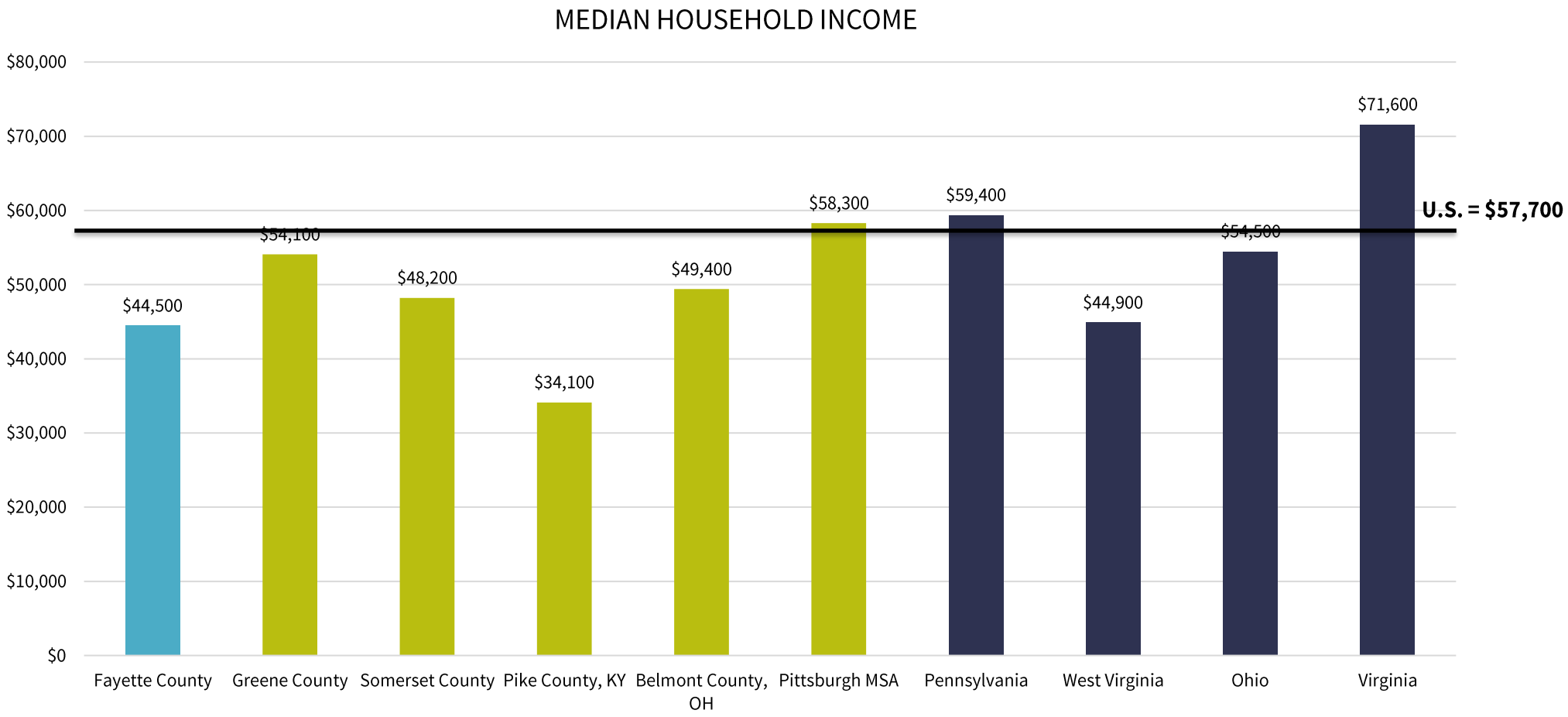
Source: U.S. Census Bureau, 2020

Demographics



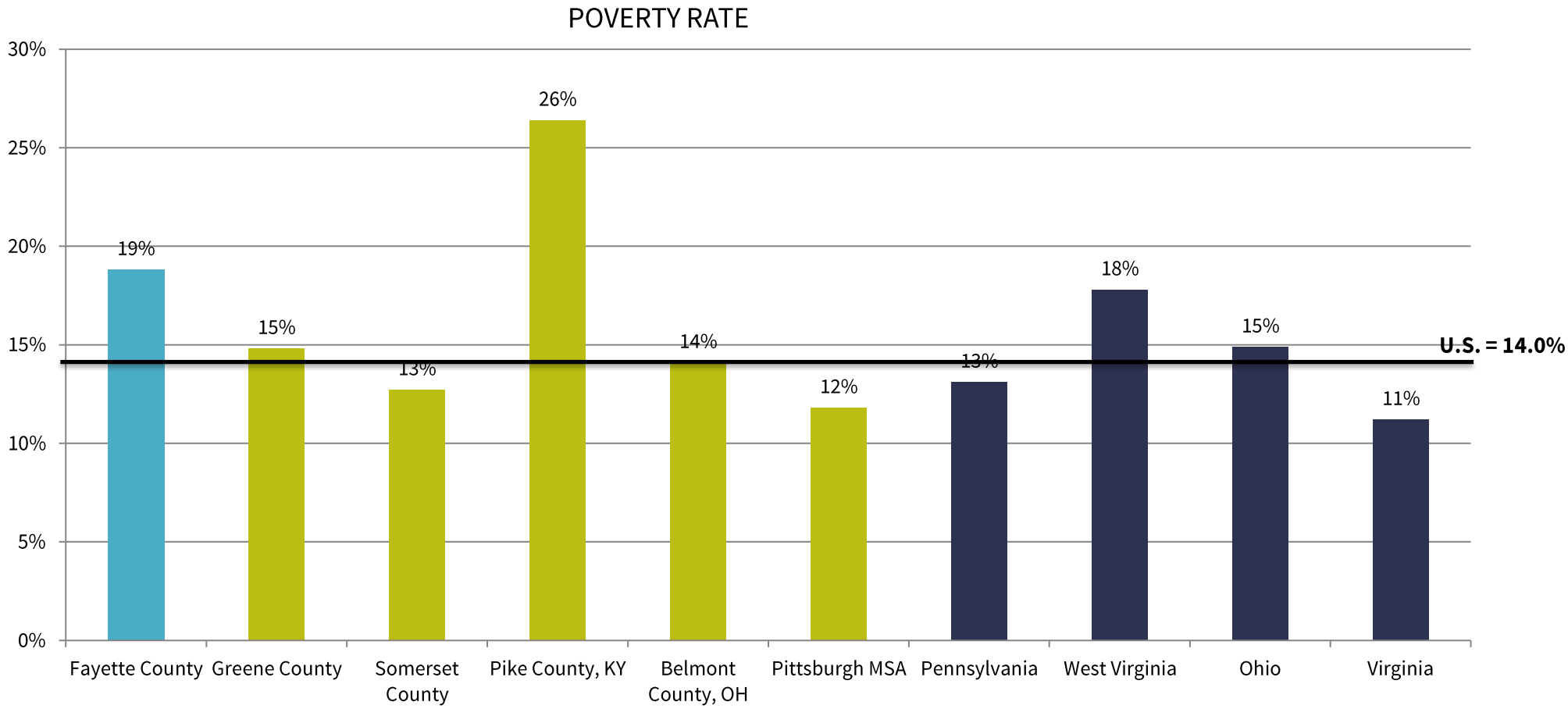
Source: U.S. Census Bureau, 2020

Demographics



Source: Emsi, 2020

Demographics



Source: Emsi, 2020

State and Local Business Climate

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State and Local Business Climate

KEY TAKEAWAYS

State Business Climate

- Pennsylvania ranks relatively well on business several climate rankings, but overall ranks below average. The state compares favorably against the competitor states in individual income taxes, sales taxes, and property taxes. The state ranks worse than competitors and the national average in unemployment insurance tax and corporate income tax.
- The state of Pennsylvania offers an extensive array of incentives and programs dedicated to businesses, communities, and local government.

Local/Regional Business Climate

- Fayette County's largest industries by number of employees include: Distributive Services, Capital-Intensive Manufacturing, Healthcare, Government, and Agriculture & Natural Resource Extraction.
- The County is extremely diversified, ranking 206 out of all 3,142 counties in the U.S. The target industry analysis will help continue this diversification within Fayette County's industry clusters.
- Fayette County's Economic Vulnerability due to COVID-19 is above average at 106.04 (average = 100), but the Pittsburgh MSA has a lower vulnerability rating of 96.48, suggesting the region's overall vulnerability is at or near average.
- Overall, stakeholders spoke favorably about the business climate in Fayette County, as well as the supportiveness of the EDC.

State and Local Business Climate

PENNSYLVANIA STATE BUSINESS CLIMATE

Pennsylvania ranks well on several important business climate factors.

Taxes

Top Individual Income Tax Rate	State and Local Individual Income Tax Collections per Capita	Top Corporate Income Tax Rate	State Business Tax Climate Index Ranking
3.07%	$1,339 (Rank #38 Lowest)	9.99%	29

State Sales Tax Rate	Combined State and Average Local Sales Tax Rate	State Gasoline Tax Rate (cents per gallon)
6.34% (Rank #17 Highest)	6.34% (Rank #16 Lowest)	58.70 cents (Rank #2 Highest)

Source: Tax Foundation, 2019

Rankings

- #6 Access to Capital (CNBC 2019)
- #9 Quality of Education (CNBC 2019)
- #12 Quality of Life (Forbes 2019)
- #13 Economic Opportunity (US News & World Report)
- #14 Business Costs (Forbes 2019)

State and Local Business Climate

PENNSYLVANIA STATE BUSINESS CLIMATE

TAX RANKINGS – 2020 STATE BUSINESS TAX CLIMATE

	Pennsylvania	West Virginia	Ohio	Virginia
Corporate Income Tax Rank (out of 50)	46	15	42	14
Individual Income Tax Rank (out of 50)	19	28	44	35
Sales Tax Ranking (out of 50)	17	18	32	11
Property Tax Rank (out of 50)	21	17	9	32
Unemployment Insurance Tax Rank (out of 50)	42	29	7	41
Overall Tax Ranking (out of 50)	29	23	38	25
State Sales Tax Rate	6.34%	6.41%	7.17%	5.65%
Individual Income Tax Rate	3.07%	6.50%	4.80%	5.75%
Corporate Income Tax Rate	9.99%	6.50%	0.00%	6.00%

Source: Tax Foundation, 2020
The color scale for each row goes from highest (dark red) to lowest (dark green)
Note: Tax rankings only factor in state sales tax rates, local sales tax rates not included in state level comparison.

State and Local Business Climate

PENNSYLVANIA STATE BUSINESS CLIMATE

Regulatory and Permitting	Pennsylvania ranks 35th out of all 50 states on Forbes Best States for Business-Regulatory Environment (2019). Stakeholders did not mention many issues working with the state or local governments.
Incentives	The state of Pennsylvania offers an extensive array of incentives and programs dedicated to businesses, communities, and local government. Companies in Fay Penn have access to a variety of both state and local incentives, listed on the following page. For start up businesses, Fayette County also has a unique asset in Launchbox, which is a no cost collaborative flex space for entrepreneurs with wrap around support services.
State Business Climate	Pennsylvania ranks 27th on "Forbes Best States for Business". As part of this overall ranking, Forbes ranks Pennsylvania 35th for Regulatory Environment, 33rd for Labor Supply, 14th for Business Costs, 40th for Growth Prospects, 12th for Quality of Life, and 23rd for Economic Climate. U.S. News & World Report ranks Pennsylvania the #41 state in the country, based on health care, education, economy, infrastructure, opportunity, fiscal stability, crime & corrections, and natural environment.

State and Local Business Climate

KEY STATEWIDE INCENTIVES – PENNSYLVANIA DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT

The state of Pennsylvania offers an extensive array of incentives and programs dedicated to businesses, communities, and local government. Companies in Fay Penn have access to a variety of both state and local incentives, including:

- Grants and Loan Programs
- Investment Capital
- Tax Relief, Credits and Abatements
- Technical Assistance
- Workforce Support
- Government Contracting
- Export Assistance

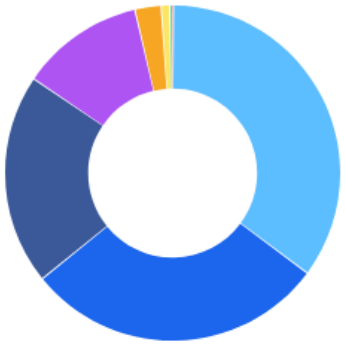
All these incentives are catalogued on the Pennsylvania Department of Community and Economic Development's website at https://dced.pa.gov/program/.

State and Local Business Climate

BUSINESS CHARACTERISTICS

Fayette County

Business Size



	Percentage	Business Count
1 to 4 employees	35.1%	1,587
5 to 9 employees	29.0%	1,312
10 to 19 employees	20.3%	919
20 to 49 employees	11.9%	538
50 to 99 employees	2.5%	114
100 to 249 employees	0.8%	37
250 to 499 employees	0.3%	12
500+ employees	0.1%	4

**Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data. In most cases, the Business Count will not match total companies with profiles on the summary tab.*

United States % Breakdown
33.9%
27.8%
21.8%
12.3%
2.6%
1.1%
0.3%
0.1%

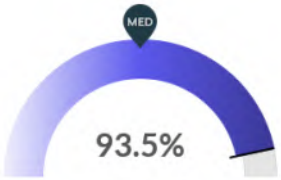
Source: Emsi, 2020

State and Local Business Climate

BUSINESS CHARACTERISTICS

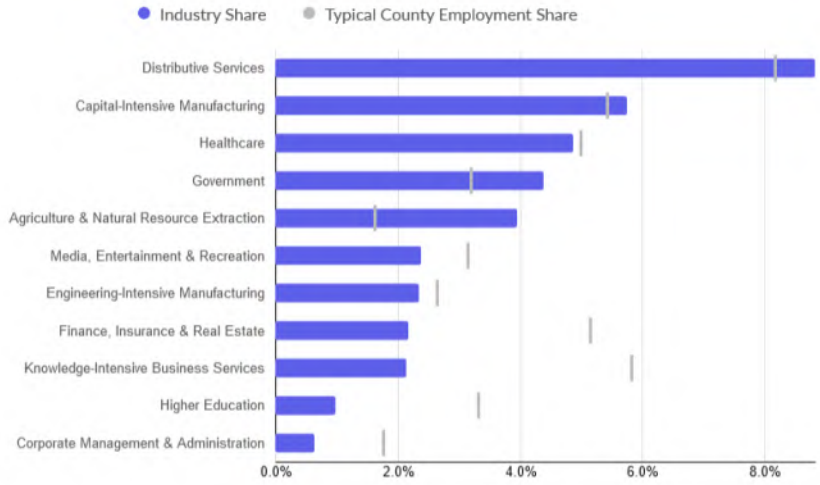
Fayette County Industry Diversity

Rank: 206
(out of 3142 Counties)



Industry Diversity

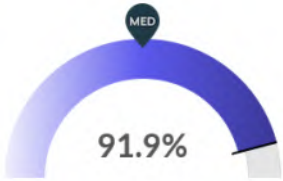
Industry diversity is high for Fayette. This means that employment is distributed more evenly between the 12 industry clusters compared to the typical county. A region with high diversity can signal economic stability and more easily withstand economic pressures, while a region with low diversity can signal economic instability.



vs

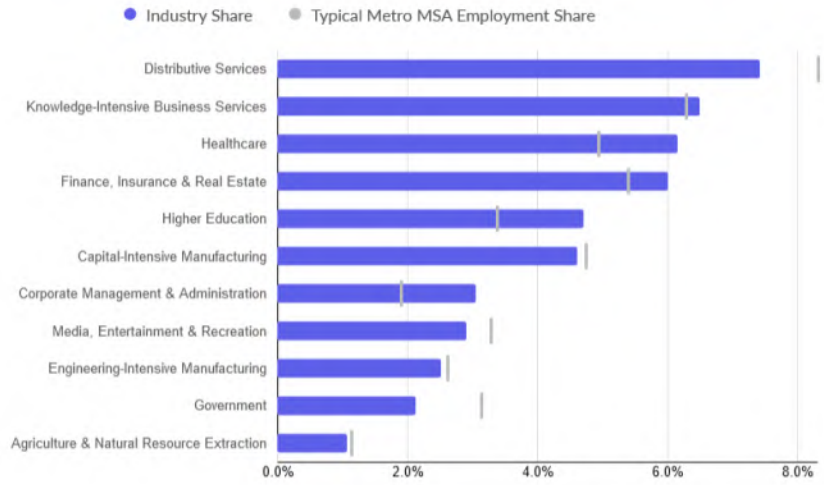
Pittsburgh MSA Industry Diversity

Rank: 76
(out of 384 Metro MSAs)



Industry Diversity

Industry diversity is high for Pittsburgh, PA. This means that employment is distributed more evenly between the 12 industry clusters compared to the typical Metro MSA. A region with high diversity can signal economic stability and more easily withstand economic pressures, while a region with low diversity can signal economic instability.

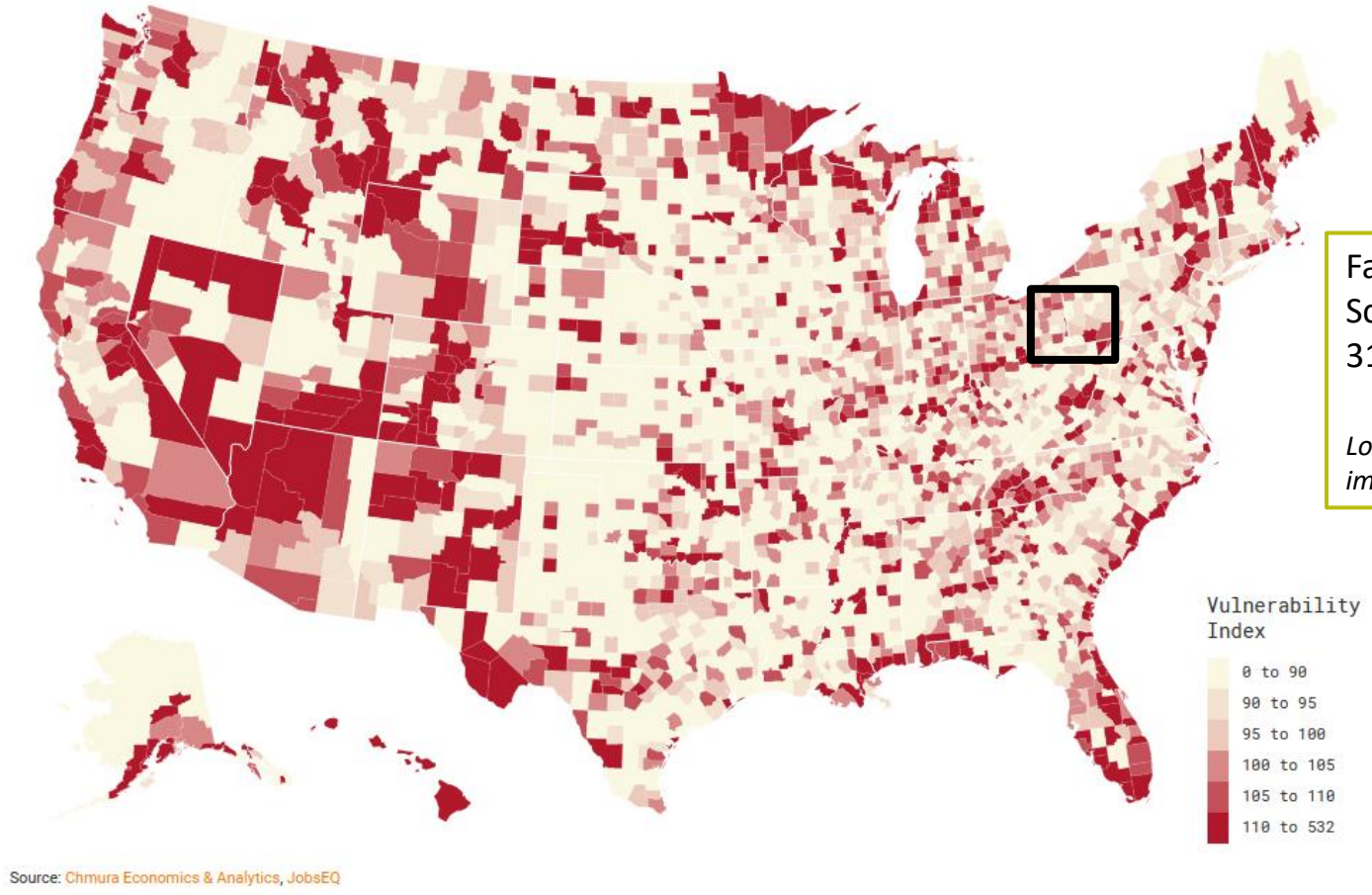


Source: Emsi, 2020

State and Local Business Climate

BUSINESS CHARACTERISTICS

Economic Vulnerability by County



Fayette's Economic Vulnerability Score is **106.04**, ranked **523rd** out of 3141 counties.

Lower scored indexes are estimated to be less impacted by COVID-19 or other pandemics.

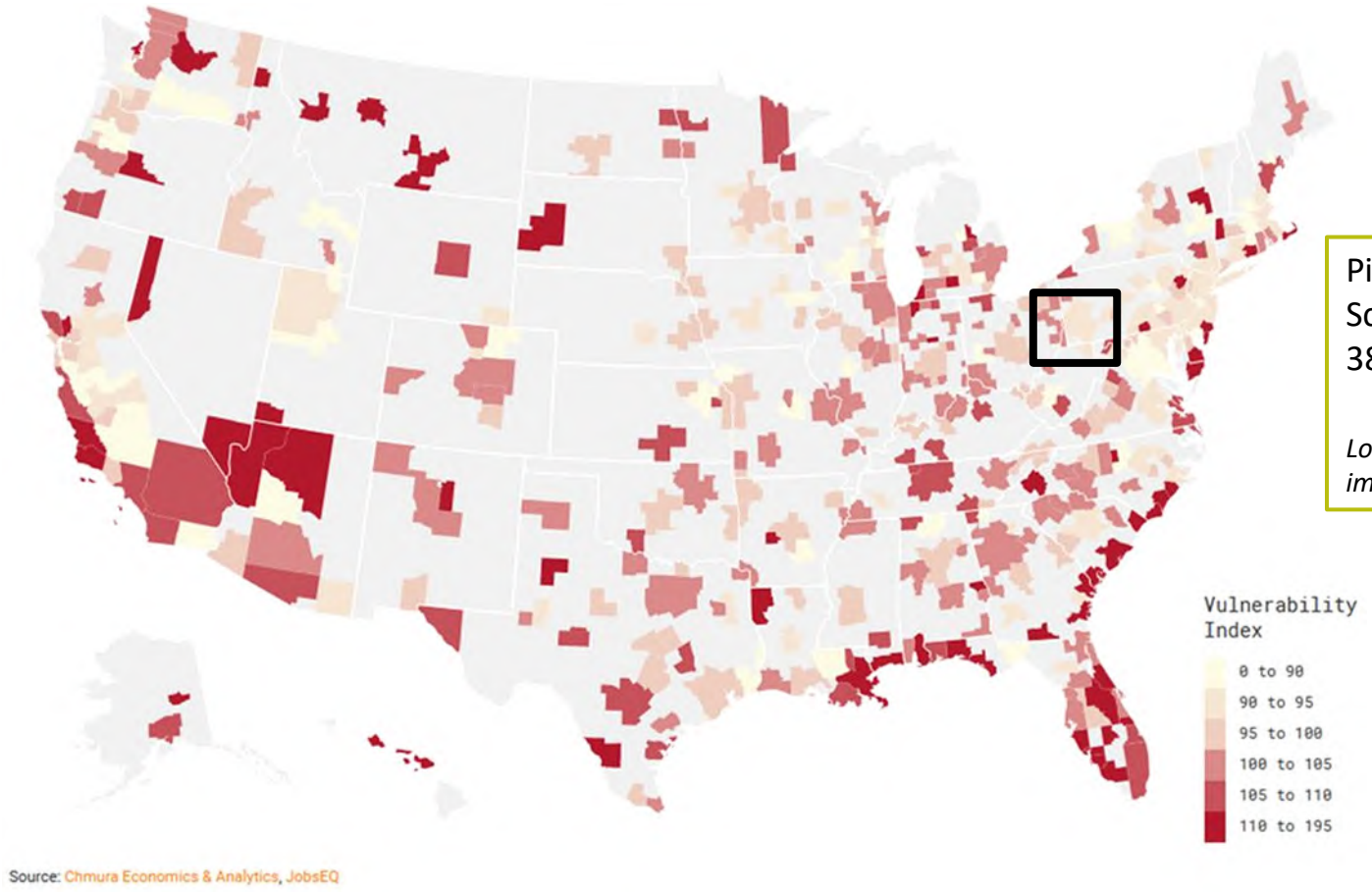
Source: Chmura, 2020

The Vulnerability Index is a measurement of the negative impact that the coronavirus crisis can have on employment based upon a region's mix of industries. For example, accommodation and food services are projected to lose more jobs as a result of the coronavirus (over half of jobs lost, on average) compared to utilities and education services (with mild or no job contractions).

State and Local Business Climate

BUSINESS CHARACTERISTICS

Economic Vulnerability by MSA



Pittsburgh's Economic Vulnerability Score is **96.48**, ranked **220nd** out of 384 MSA's.

Lower scored indexes are estimated to be less impacted by COVID-19 or other pandemics.

Source: Chmura, 2020

The Vulnerability Index is a measurement of the negative impact that the coronavirus crisis can have on employment based upon a region's mix of industries. For example, accommodation and food services are projected to lose more jobs as a result of the coronavirus (over half of jobs lost, on average) compared to utilities and education services (with mild or no job contractions).

Infrastructure

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Infrastructure

KEY TAKEAWAYS

- Fayette County's location and transportation access was noted as a key asset to stakeholders. The county is strategically located within three hours or less of major metro areas on the East Coast and has immediate access to three US Highways that connect to a variety of interstates.
- Rail is also a transportation asset in the region that companies can take advantage of. This will be considered in the target industry analysis.
- Currently listed on Fay-Penn EDC's GIS tool, there are 19 sites ranging from 1 to 680+ acres and 21 available buildings, the largest 300,000+ square feet. Stakeholders noted the availability of land as an asset in the region.
- Utilities were not noted by stakeholders to be a current challenge or barrier to growth for the county. Some noted challenges with broadband access and some of this may be alleviated by the recent CARES Act funding.

Infrastructure

Highway	Fayette County has immediate access to highways US-40, US-43, and US-119. These highways connect to surrounding interstates I-68, I-70, I-76, and I-79. These highways give the county immediate access to Pittsburgh, Philadelphia, Columbus (OH), Cleveland (OH), Washington D.C., and Baltimore (MD). Eastbound along I-70 and I-76, the county can reach Eastern Seaboard cities in a four-hour drive. Westbound, the county connects to major metros in the Midwest, and can reach as far as Indianapolis within 500 miles.
Rail	Fayette County has access to two Class I rail lines: CSX and Norfolk Southern. The county also has access to Southwest Pennsylvania Railroad, a shortline company in the region. These lines connect Fayette county to Pittsburgh, a hub connecting the Eastern Seaboard to the Midwest. Fay-Penn currently has one building listed with railroad access, an industrial building of 118,373 square feet on a 17-acre site. Fay-Penn also has five sites listed with rail access, with sites ranging in size from 1 acre to 686 acres, with larger plots being divisible.
Air	Fayette County is home to Connellsville Airport: with the longest runway measuring 3,833 feet. Outside the county, Fayette County has access to Morgantown Municipal Airport within 30 minutes, which has 1,000 connecting flights to domestic and international destinations, as well as Pittsburgh International Airport in a 90-minute drive, with over 1,100 nonstop flights weekly to 45 cities in the United States, Canada, Europe, and Central America.
Port	Fayette County has access to four ports along the Monongahela River that connect to the Port of Pittsburgh in Pittsburgh. The port accesses the three rivers in Allegheny, Monongahela, and Ohio.

Infrastructure

Sites

Fayette County currently has 19 sites listed on their GIS tool on the Fay-Penn website. Sites range from less than an acre to 686 acres, with the average being about 100 acres. Most sites above one acre are also divisible.

Ady Advantage was able to see several industrial properties via a virtual windshield tour, including several ready business parks.

Buildings

Fayette County currently has 21 buildings listed as available on their GIS Website. There is over 75,000 square feet of commercial real estate in the region. Per the sites and buildings database, the minimum building size is 240 square feet while the maximum is 168,000 square feet. Of the buildings listed, six of the buildings are listed for industrial use, four are listed for office use, and one is listed for commercial use. Many of these building are given detailed information in their GIS database.

Utilities

Water and sewer utilities are served by several municipal providers. There was not noted to be any challenges associated with these utilities from stakeholders.

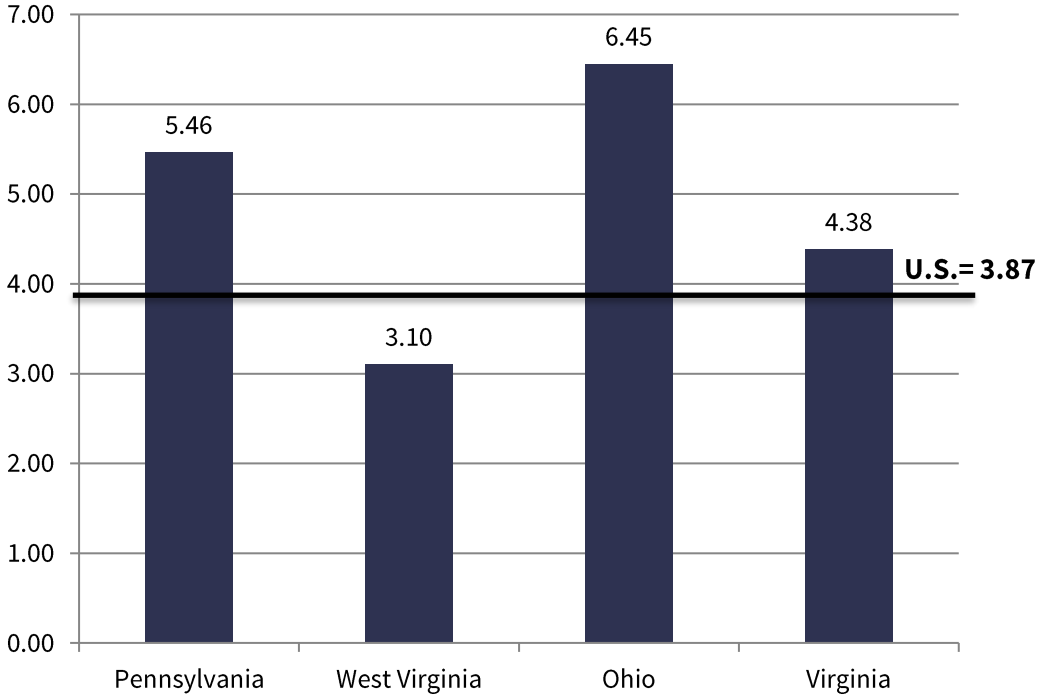
The county is served with **electric power** by West Penn Power, a First Energy company, and served with **natural gas** by Columbia Gas.

The county has access to **fiber** via several providers, including Verizon and Atlantic Broadband; however, there are challenges with fiber in the southern part of the county where it is rocky. In September, Fayette County received funding through the CARES Act to install the necessary infrastructure to expand Wi-Fi internet capabilities countywide.

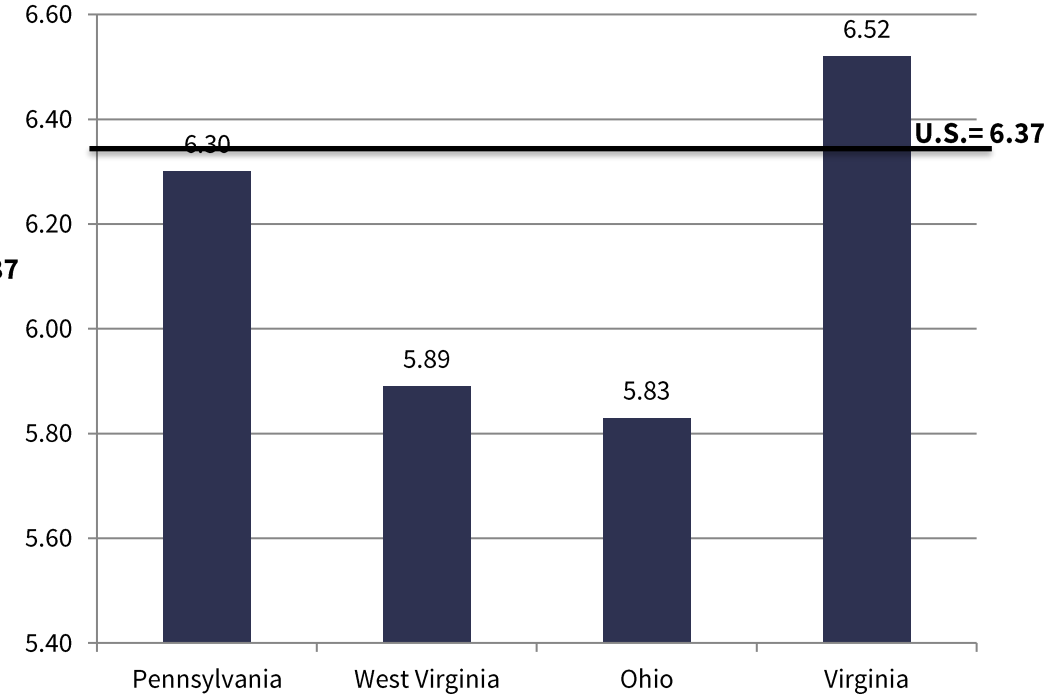
Infrastructure

Utility Costs: November 2019

AVERAGE INDUSTRIAL GAS COSTS
(IN DOLLARS PER THOUSAND CUBIC FEET)



AVERAGE INDUSTRIAL ELECTRIC COSTS
(IN CENTS PER KILOWATT-HOUR)



Source: EIA

While industrial gas and electric costs in Pennsylvania are higher than most of the other comparison states, Fayette County's rates are competitive with or lower than all comparison states with the following reported rates:

- Gas: 23 cents per therm, or $2.30 per thousand cubic feet.
- Electric: 5.25 cents per kilowatt-hour

Education and Workforce

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Education and Workforce

KEY TAKEAWAYS

- With a regional labor force of nearly 1.3 million people in the greater region, companies have access to a highly skilled pool of talent. Within the greater region there are 19 educational institutions, including a good mix of community colleges and technical schools, as well as four-year universities.

- In occupation groups, Fayette County has a particularly high concentration in:
    - Community and Social Service Occupations,
    - Healthcare Practitioners and Technical Occupations
    - Food Preparation and Serving Related Occupations
    - Personal Care and Service Occupations
    - Sales and Related Occupations
    - Construction and Extraction Occupations
    - Installation, Maintenance, and Repair Occupations
    - Transportation and Material Moving Occupations

- It should be noted that the unemployment rate in Fayette is higher than the comparison regions, indicating the county has some more room for employment than its neighbors. Their unemployment is still low. This is an indicator of a strong economy but can also put strains on companies in the region looking to hire more people. Companies will likely turn to automation and other unique solutions to find talent.

- According to the analysis in this section, the jobs most at risk for automation include: Food Preparation and Serving Related; Building and Grounds Cleaning and Maintenance; Farming, Fishing, and Forestry; Construction and Extraction; Installation, Maintenance, and Repair; Production; and Transportation and Material Moving.

- The top posted occupations in the region include: Transportation and Material Moving, Healthcare Practitioners and Practical, Sales and Related, Personal Care and Service, Office and Administrative Support, Food Preparation and Serving Related, and Installation Maintenance Service and Repair.

Education and Workforce

- **Penn State Fayette (Eberly Campus):** Eberly, with an enrollment of about 650 students. The school offers majors in a variety of fields,, including business, electro-mechanical engineering technology, nursing, and supply chain management. The university also offers associate degrees, including business administration, and electrical engineering.

Four-Year Universities

The following schools are within the surrounding counties as well:

- **Seton Hall University**
- **St. Vincent College**
- **University of Pittsburgh**
- **Carnegie Mellon University**
- **Duquesne University**
- **Washington & Jefferson College**
- **California University of Pennsylvania**
- **Waynesburg University**

Education and Workforce

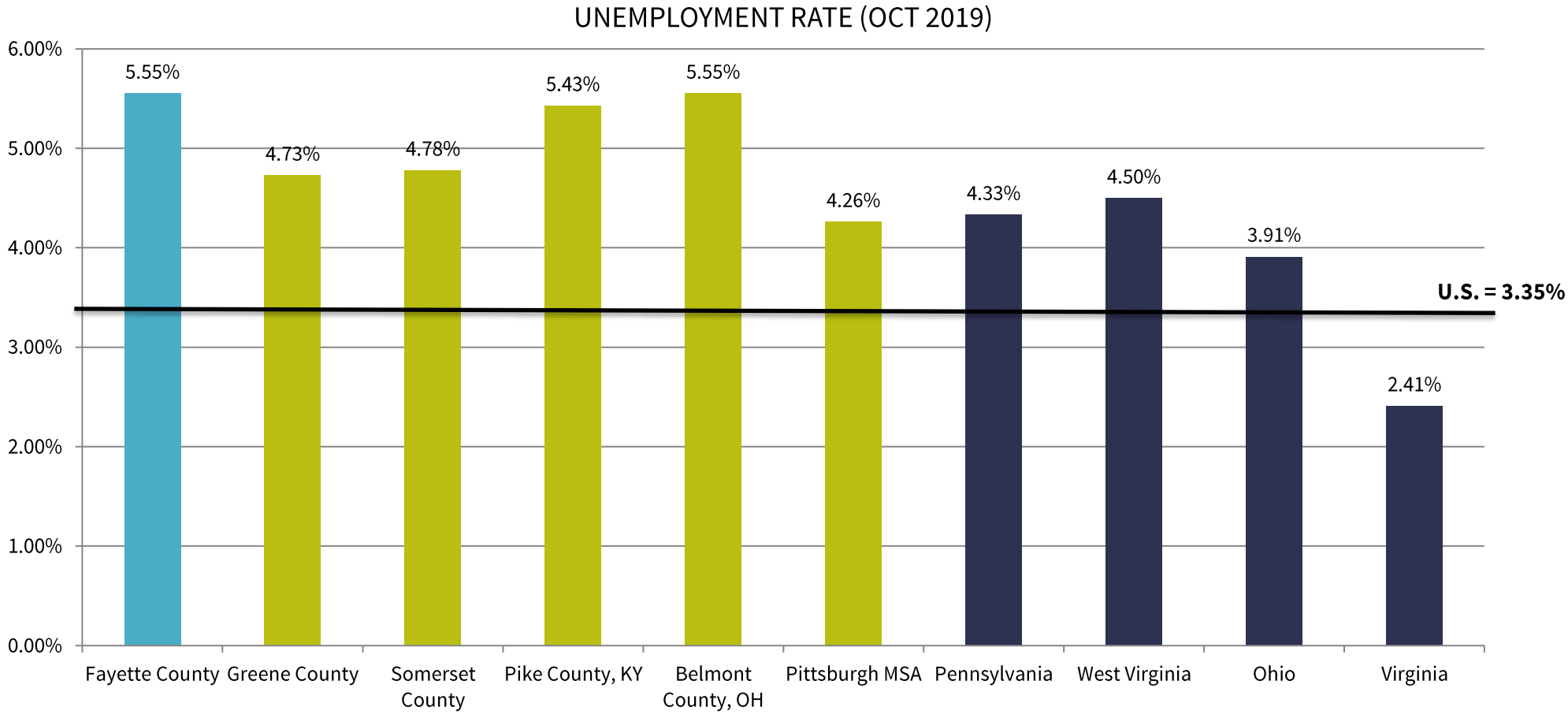
Community Colleges, Tech Schools, and Training Programs

- **Community Training Institute (CTI):** Located in Uniontown and operated by the Fayette County Community Action Agency, the onsite training center provides a Certified Nursing Assistant (CNA) program.
- **Douglas Education Center:** Located in Monessen. The center offers programs in the following fields: medical assistants, medical billing and coding, heavy equipment and CDL training, safety, and licensing, cosmetology and esthetics, massage therapy, and filmmaking and effects programs.
- **Fayette County Career & Technical Institute:** Located in Uniontown. The institute provides services to high schools, adult education, and nursing programs. Students are provided technical opportunities with emphasis on core academics in a variety of programs, including agriculture, automotive services, construction, health care, information technology, machine production, masonry, and welding.
- **Fayette Institute of Commerce and Technology:** Located in Uniontown, the institute offers a training program for maintenance electricity certification.
- **Laurel Business Institute**: Located in Uniontown. With an enrollment of about 240 students, offers programs in their schools of Business, Health Care, Information Technology, Spa and Cosmetology Arts, and School of Trades.
- **United Career Institute:** Located in Mount Braddock. The institute is an adult education school that offers programs in medical assisting, medical office administration, and practical nursing.
- **Westmoreland County Community College:** Located throughout southeast Pennsylvania, provides programs and training in a variety of fields, including accounting, advanced manufacturing, applied industrial technology, biology, bionanotechnology, business, computer sciences, electronics, engineering technology, health sciences, nursing, sciences, and welding technology.

Availability of Labor

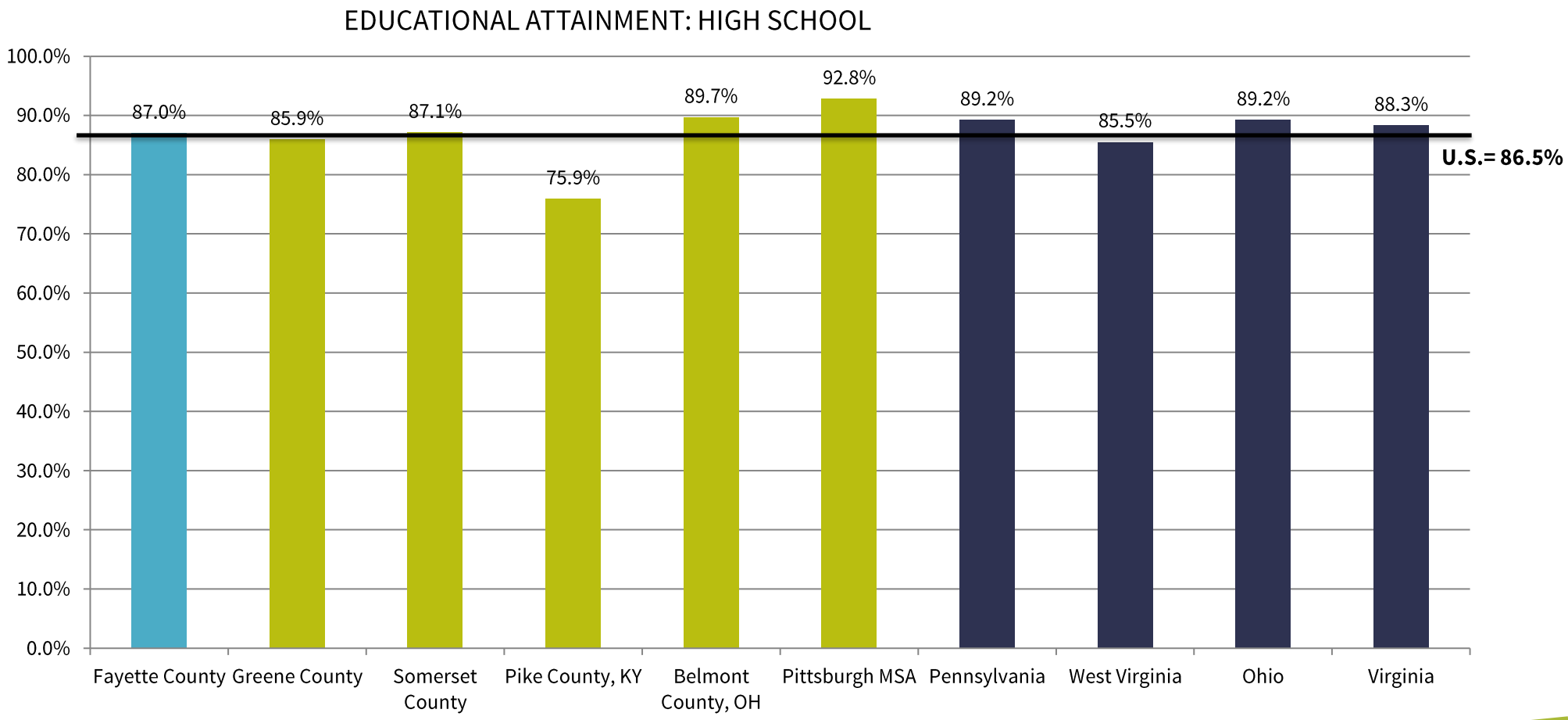
Fayette County has higher unemployment rates than all comparison regions except Belmont County. This number is still low, and suggests that the region is near full employment, but has more room for employment than other regions. It should also be noted that Fayette County has experienced a steady decrease in population over the past 10-year period, as well as stagnant growth in labor force.

Education and Workforce



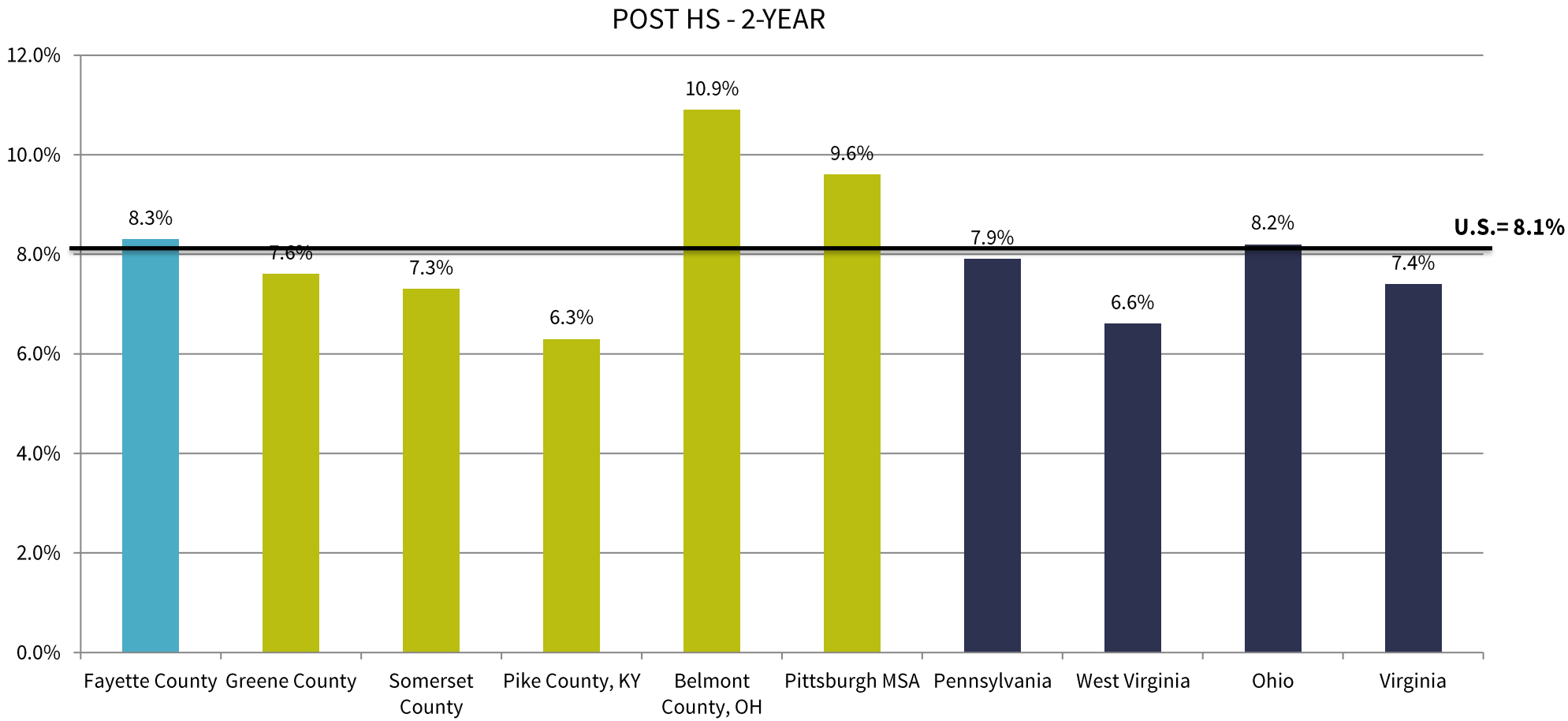
Source: Emsi, 2020

Education and Workforce



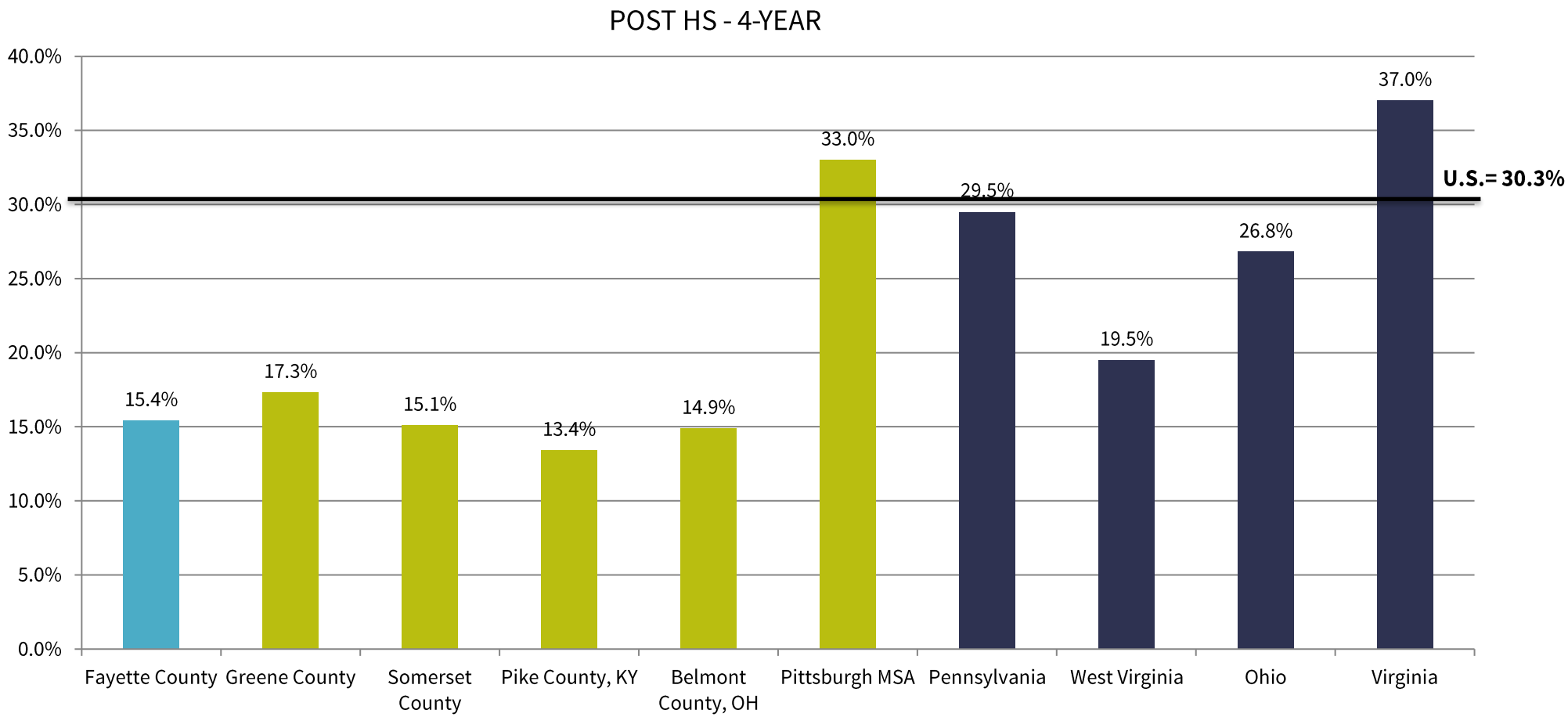
Source: Emsi, 2020

Education and Workforce



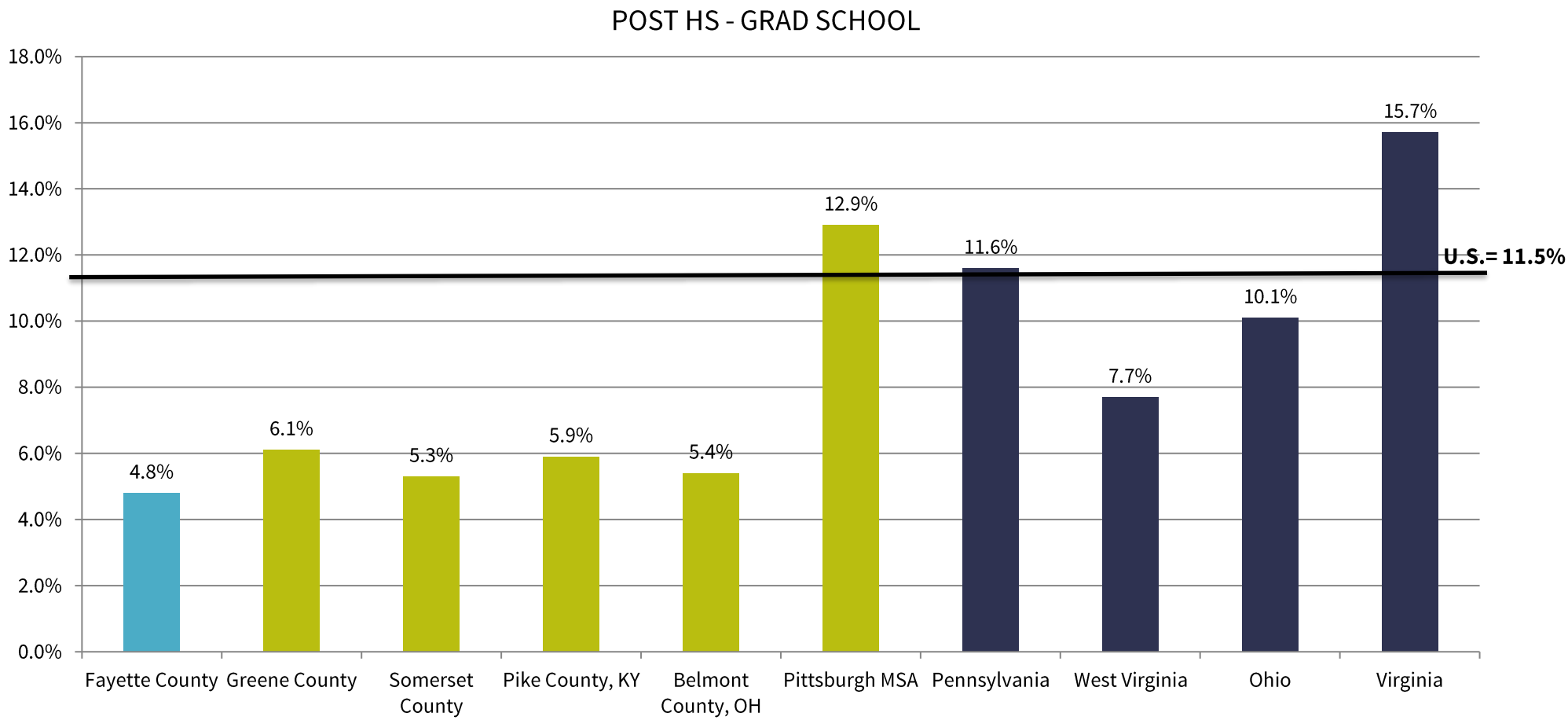
Source: Emsi, 2020

Education and Workforce



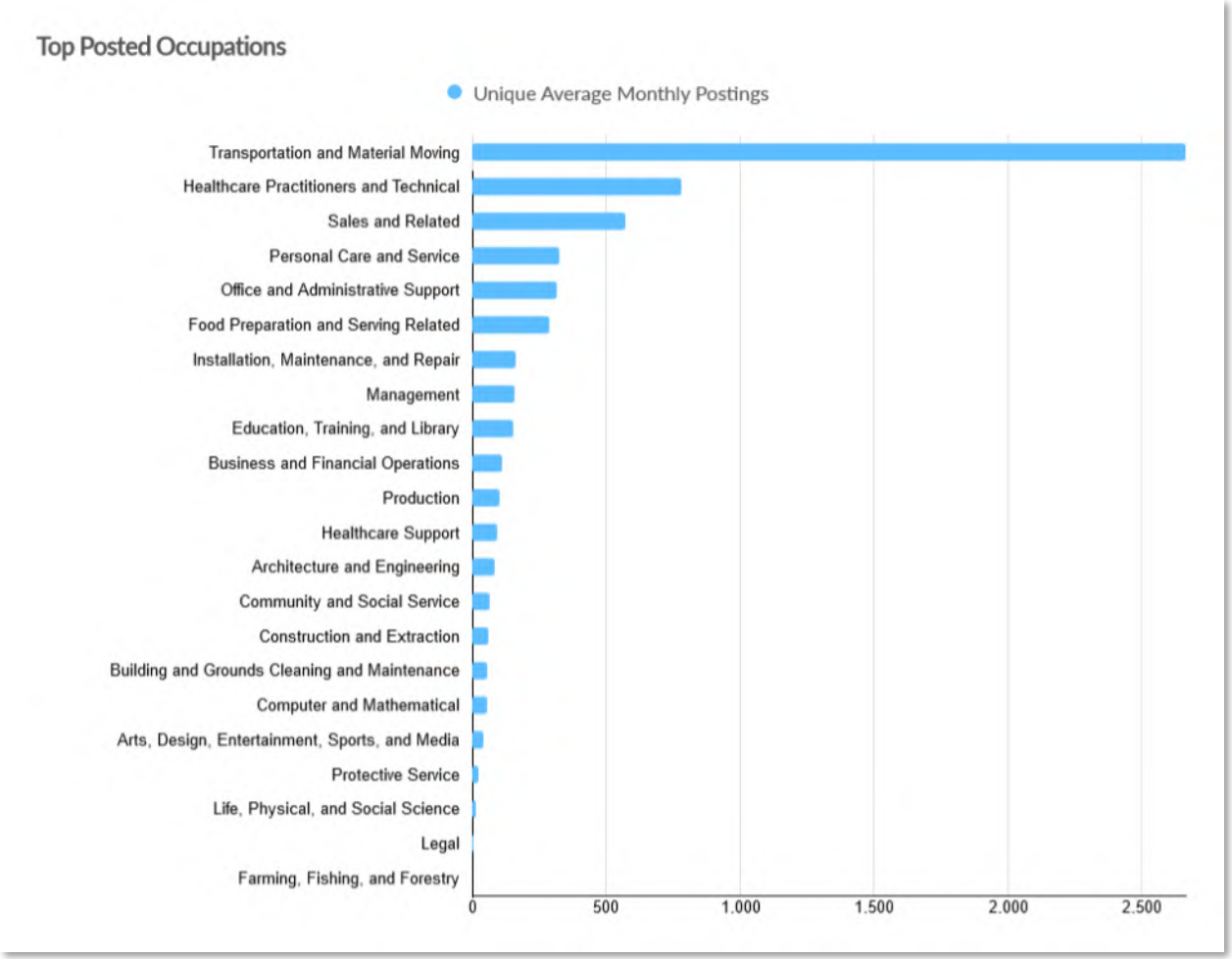
Source: Emsi, 2020

Education and Workforce



Source: Emsi, 2020

Education and Workforce



Region: Fayette County

Source: Emsi, 2020

This data is job posting data from Emsi. Emsi's postings data is gathered by scraping over 100,000 websites, including company career sites, national and local job boards, and job posting aggregators. Job postings are assessed for likely duplicate postings, which are singularized when sufficient data is present. Deduplication is the process of identifying duplicate job postings that are connected to the same vacancy. Multiple copies of a particular posting are often scraped from various sources on the internet. Rather than allowing these duplicates to artificially inflate the posting count, Emsi deduplicates the data before presenting it for analysis.

Education and Workforce

RESULTS PRESENTED ON GRAPHS

The various bubble charts, shown on the following pages, graphically show this first-level industry analysis for Fayette County (Core Region). The core region will be compared to the Greater Region, which is defined as the following counties (all in Pennsylvania unless noted): Allegheny, Beaver, Cambria, Greene, Monongalia (WV), Somerset, Washington, and Westmoreland.

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

- *Stars (Gold):* Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- *Mainstays (Blue):* Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- *Opportunities (Green):* Positive Growth / Below Average Concentration: These industries have been growing but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- *Reactive (Red):* Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.

Education and Workforce

GEOGRAPHIC PARAMETERS

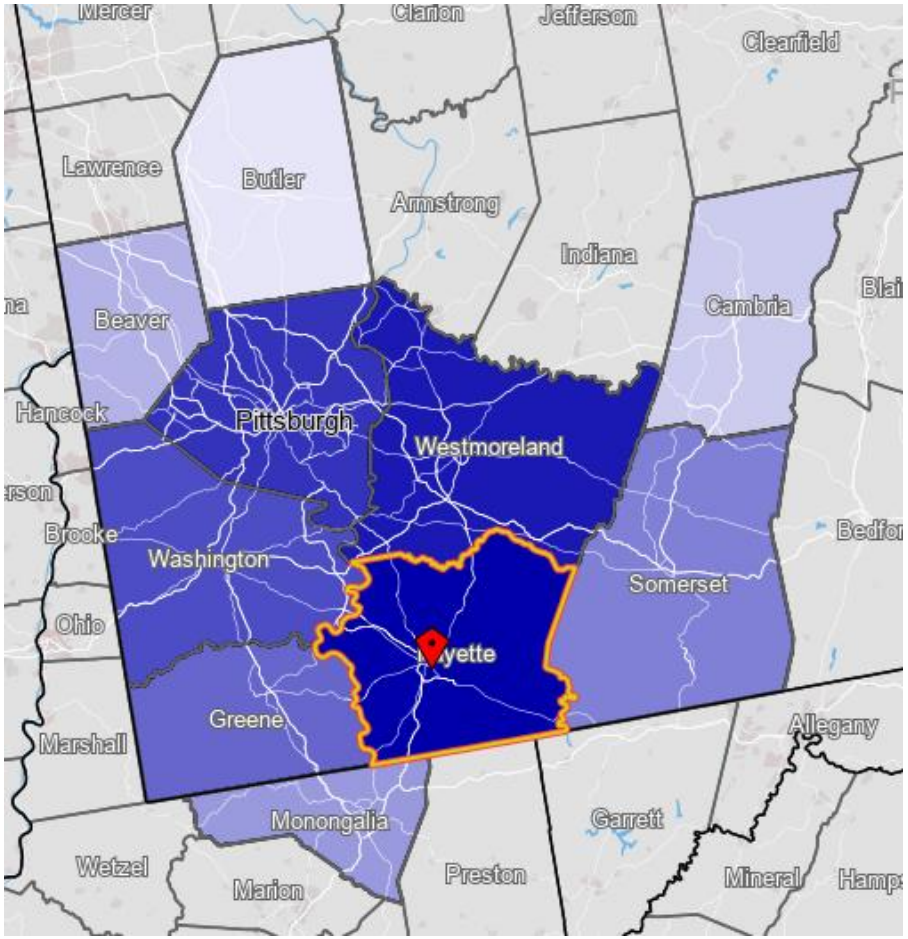
Dark Blue = Core Region

- Fayette County

Shaded Blue = Greater Region (The portion that is part of the immediate Fayette County laborshed)

- Allegheny County (Pittsburgh)
- Beaver County
- Cambria County
- Greene County
- Monongalia County (WV)
- Somerset County
- Washington County
- Westmoreland County

For purposes of data analysis in this section, all the counties colored on the map are included in the target industry analysis, to better capture value-add and supply chain opportunities.

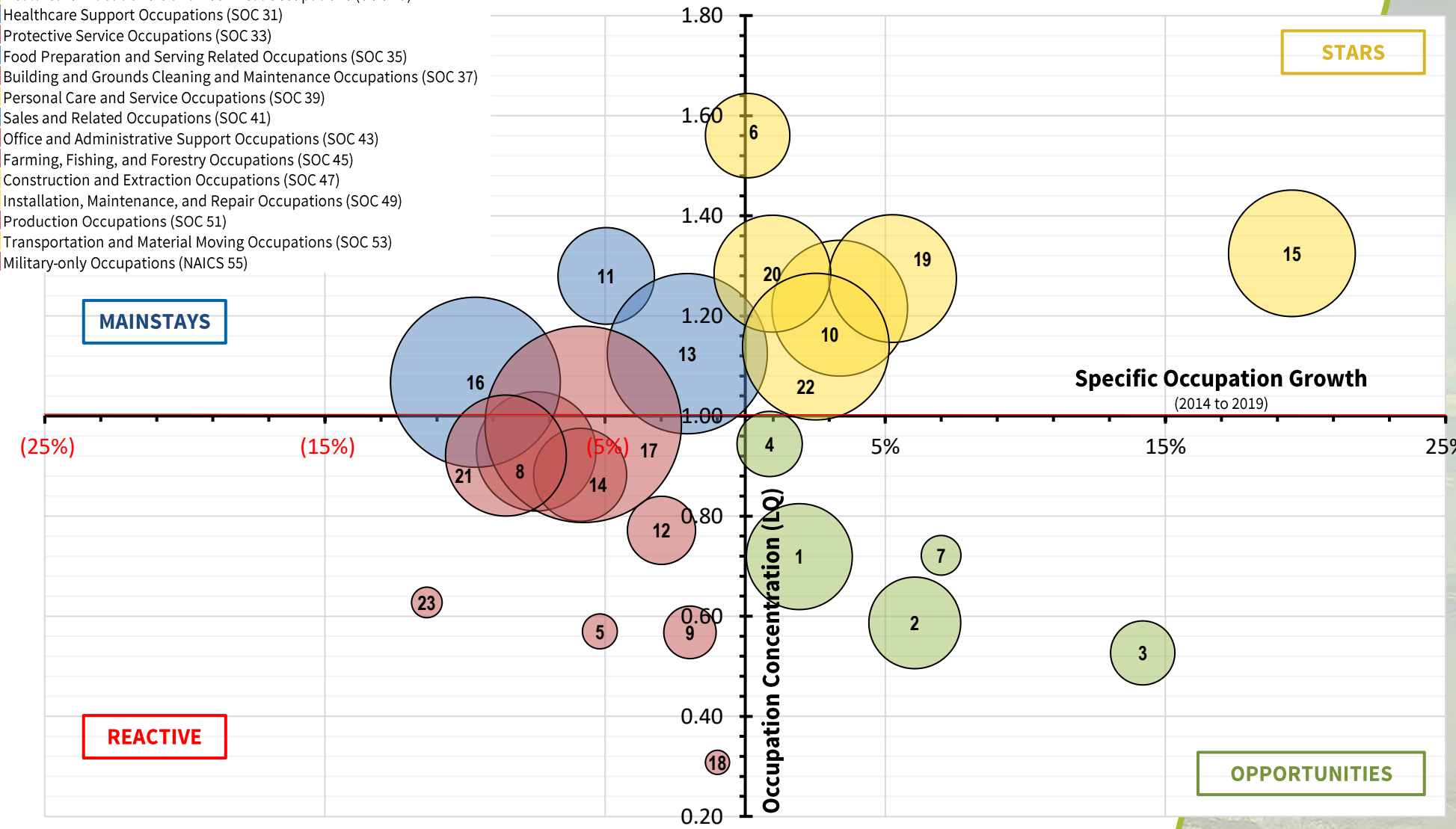


Source: onthemap.com

Education and Workforce

1 Management Occupations (SOC 11)
2 Business and Financial Operations Occupations (SOC 13)
3 Computer and Mathematical Occupations (SOC 15)
4 Architecture and Engineering Occupations (SOC 17)
5 Life, Physical, and Social Science Occupations (SOC 19)
6 Community and Social Service Occupations (SOC 21)
7 Legal Occupations (SOC 23)
8 Education, Training, and Library Occupations (SOC 25)
9 Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)
10 Healthcare Practitioners and Technical Occupations (SOC 29)
11 Healthcare Support Occupations (SOC 31)
12 Protective Service Occupations (SOC 33)
13 Food Preparation and Serving Related Occupations (SOC 35)
14 Building and Grounds Cleaning and Maintenance Occupations (SOC 37)
15 Personal Care and Service Occupations (SOC 39)
16 Sales and Related Occupations (SOC 41)
17 Office and Administrative Support Occupations (SOC 43)
18 Farming, Fishing, and Forestry Occupations (SOC 45)
19 Construction and Extraction Occupations (SOC 47)
20 Installation, Maintenance, and Repair Occupations (SOC 49)
21 Production Occupations (SOC 51)
22 Transportation and Material Moving Occupations (SOC 53)
23 Military-only Occupations (NAICS 55)

CORE REGION OCCUPATIONAL GROWTH & OCCUPATIONAL CONCENTRATION



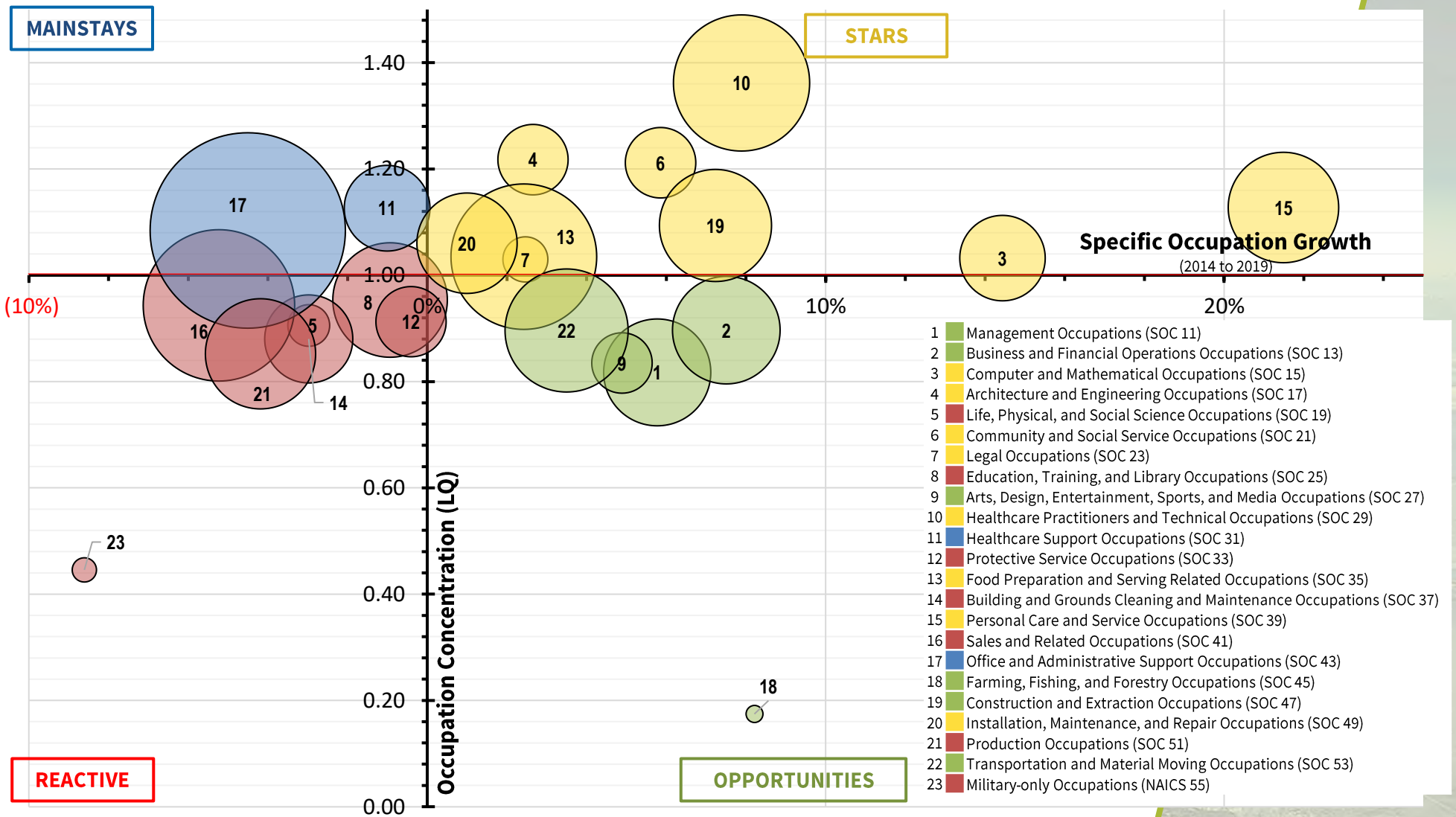
Circle Size = Number of employees in Fayette County
Source: Emsi 2020

Total Employees in Fayette County: 43,536

= 1,500 employees

Education and Workforce

GREATER REGION OCCUPATIONAL GROWTH & OCCUPATIONAL CONCENTRATION



Circle Size = Number of employees in Greater Region
Source: Emsi 2020

Total Employees in Greater Region: 1,376,904

= 70,000 employees

Education and Workforce

Existing Occupation Concentration Comparison	Core Region Total Employment	Greater Region Total Employment	Core Region Location Quotient	Greater Region Location Quotient
Total All Occupations	**43,536**	**1,376,904**	-	-
Management Occupations (SOC 11)	1,794	64,471	0.72	0.82
Business and Financial Operations Occupations (SOC 13)	1,349	65,246	0.59	0.90
Computer and Mathematical Occupations (SOC 15)	668	41,381	0.53	1.03
Architecture and Engineering Occupations (SOC 17)	691	28,179	0.94	1.22
Life, Physical, and Social Science Occupations (SOC 19)	201	10,103	0.57	0.91
Community and Social Service Occupations (SOC 21)	1,144	28,102	1.56	1.21
Legal Occupations (SOC 23)	260	11,738	0.72	1.03
Education, Training, and Library Occupations (SOC 25)	2,282	74,032	0.93	0.95
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	448	20,849	0.57	0.83
Healthcare Practitioners and Technical Occupations (SOC 29)	2,940	104,212	1.22	1.36
Healthcare Support Occupations (SOC 31)	1,494	41,591	1.28	1.13
Protective Service Occupations (SOC 33)	747	27,968	0.77	0.91
Food Preparation and Serving Related Occupations (SOC 35)	4,078	118,679	1.12	1.03
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	1,389	43,827	0.88	0.88
Personal Care and Service Occupations (SOC 39)	2,560	68,893	1.33	1.13
Sales and Related Occupations (SOC 41)	4,589	128,272	1.07	0.94
Office and Administrative Support Occupations (SOC 43)	6,112	213,163	0.98	1.08
Farming, Fishing, and Forestry Occupations (SOC 45)	100	1,792	0.31	0.17
Construction and Extraction Occupations (SOC 47)	2,601	70,582	1.27	1.09
Installation, Maintenance, and Repair Occupations (SOC 49)	2,179	56,877	1.28	1.06
Production Occupations (SOC 51)	2,335	68,337	0.92	0.85
Transportation and Material Moving Occupations (SOC 53)	3,418	85,100	1.14	0.90
Military-only Occupations (NAICS 55)	156	3,513	0.63	0.45

Source: Emsi 2020

Core Region LQ > than Greater Region (by ≥ 0.2)
Core Region LQ < than Greater Region (by ≥ 0.2)
Core Region LQ and Greater Region LQ are not significantly different

Education and Workforce

Existing Occupation Wage Comparison	Core Region Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Pennsylvania Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Total Occupation (Average Wage)	**$20.62**	**$24.02**	**$24.30**	**$25.07**
Management Occupations (SOC 11)	$47.87	$55.39	$55.87	$54.14
Business and Financial Operations Occupations (SOC 13)	$32.36	$36.34	$37.05	$37.92
Computer and Mathematical Occupations (SOC 15)	$34.68	$38.64	$40.37	$43.63
Architecture and Engineering Occupations (SOC 17)	$35.08	$38.66	$38.66	$42.19
Life, Physical, and Social Science Occupations (SOC 19)	$32.35	$32.89	$37.38	$37.42
Community and Social Service Occupations (SOC 21)	$19.67	$21.02	$22.16	$23.80
Legal Occupations (SOC 23)	$45.85	$51.29	$51.63	$53.79
Education, Training, and Library Occupations (SOC 25)	$24.66	$28.52	$28.30	$27.04
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	$23.43	$25.13	$25.94	$29.71
Healthcare Practitioners and Technical Occupations (SOC 29)	$30.53	$34.53	$37.33	$40.07
Healthcare Support Occupations (SOC 31)	$13.74	$15.27	$15.47	$15.71
Protective Service Occupations (SOC 33)	$23.69	$21.45	$21.98	$23.44
Food Preparation and Serving Related Occupations (SOC 35)	$10.58	$11.70	$11.75	$12.32
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	$14.05	$14.13	$14.53	$14.75
Personal Care and Service Occupations (SOC 39)	$12.09	$12.77	$12.88	$13.72
Sales and Related Occupations (SOC 41)	$16.69	$20.19	$21.37	$21.30
Office and Administrative Support Occupations (SOC 43)	$16.37	$18.02	$18.38	$18.77
Farming, Fishing, and Forestry Occupations (SOC 45)	$17.15	$15.13	$15.87	$14.76
Construction and Extraction Occupations (SOC 47)	$22.79	$25.29	$25.08	$23.93
Installation, Maintenance, and Repair Occupations (SOC 49)	$21.35	$23.42	$23.24	$23.38
Production Occupations (SOC 51)	$18.62	$19.92	$19.26	$18.87
Transportation and Material Moving Occupations (SOC 53)	$17.90	$18.35	$18.19	$18.94
Military-only Occupations (NAICS 55)	$23.90	$26.83	$26.56	$20.13

Source: Emsi 2020

Core Region wages < Greater Region, Pennsylvania and U.S. wages
Core Region wages > Two of three of the comparison region. wages
Core Region wages < Two of three of the comparison region wages

Education and Workforce

Existing Occupation Growth Comparison 5-Year Growth and 5-Year Projected Growth	Core Region Growth (2014 - 2019)	Core Region Projected Growth (2019 - 2024)	Greater Region Growth (2014 - 2019)	Greater Region Projected Growth (2019 - 2024)	Pennsylvania Growth (2014 - 2019)	Pennsylvania Projected Growth (2019 - 2024)	U.S. Growth (2014 - 2019)	U.S. Projected Growth (2019 - 2024)
Total All Occupations	**(1)%**	**1%**	**2%**	**2%**	**4%**	**3%**	**7%**	**6%**
Management Occupations (SOC 11)	2%	3%	6%	4%	8%	5%	12%	6%
Business and Financial Operations Occupations (SOC 13)	6%	3%	8%	3%	11%	4%	14%	6%
Computer and Mathematical Operations (SOC 15)	14%	3%	14%	7%	13%	7%	16%	9%
Architecture and Engineering Occupations (SOC 17)	1%	6%	3%	1%	8%	3%	8%	6%
Life, Physical, and Social Science Occupations (SOC 19)	(5%)	8%	(3%)	3%	6%	4%	4%	6%
Community and Social Service Occupations (SOC 21)	0%	5%	6%	5%	8%	6%	10%	9%
Legal Occupations (SOC 23)	7%	3%	2%	1%	4%	2%	6%	4%
Education, Training, and Library Occupations (SOC 25)	(7%)	(4%)	(1%)	1%	2%	2%	5%	6%
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	(2%)	(2%)	5%	2%	6%	3%	9%	5%
Healthcare Practitioners and Technical Occupations (SOC 29)	3%	1%	8%	5%	8%	5%	11%	8%
Healthcare Support Occupations (SOC 31)	(5%)	6%	(1%)	8%	1%	11%	4%	12%
Protective Service Occupations (SOC 33)	(3%)	0%	(0%)	(0%)	2%	1%	4%	4%
Food Preparation and Serving Related Occupations (SOC 35)	(2%)	(0%)	2%	3%	5%	5%	9%	7%
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	(6%)	(3%)	(3%)	2%	(2%)	3%	2%	6%
Personal Care and Service Occupations (SOC 39)	20%	8%	21%	9%	27%	13%	19%	11%
Sales and Related Occupations (SOC 41)	(10%)	(5%)	(5%)	(4%)	(3%)	(1%)	2%	3%
Office and Administrative Support Occupations (SOC 43)	(6%)	(3%)	(5%)	(2%)	(2%)	(1%)	1%	3%
Farming, Fishing, and Forestry Occupations (SOC 45)	(1%)	(9%)	8%	1%	5%	3%	4%	3%
Construction and Extraction Occupations (SOC 47)	5%	8%	7%	5%	7%	4%	11%	6%
Installation, Maintenance, and Repair Occupations (SOC 49)	1%	1%	1%	(0%)	4%	2%	7%	5%
Production Occupations (SOC 51)	(9%)	(1%)	(4%)	(3%)	(1%)	(2%)	2%	2%
Transportation and Material Moving Occupations (SOC 53)	3%	5%	3%	1%	10%	4%	12%	7%
Military-only Occupations (SOC 55)	(11%)	(4%)	(9%)	(3%)	(7%)	(2%)	(3%)	(0%)

Source: Emsi 2020

Occupation growth greater than or equal to five percent in the respective region and time frame.
Occupation growth is less than or equal to negative five percent in the respective region and time frame.

Automation Index

The Automation Index by Emsi

- Emsi's US Automation Index analyzes the potential automation risk of occupations based on job task content—derived from O*NET work activities. Combining that data with the Frey and Osborne findings at the occupation level, we identify which job tasks are 'at risk' and which are resilient. Emsi also incorporates data to identify where occupations cluster in industries facing disruption, and where workers' skills mean their nearest job options are also facing automation risk. This is a 100-based index, meaning that occupations with an automation index above 100 have an above average risk of automation, while occupations with an automation index of below 100 have a below average risk of automation.

  Note: automation index is unavailable for Legislators, Military, and Unclassified occupations, so they are excluded from aggregate indexes for higher-level occupations.

- ***O*NET Work Activities – Performing General Physical Activities***
  - O*NET defines these activities as those that require considerable use of arms, legs, and moving your whole body, such as climbing lifting, balancing, walking, stooping, and handling of materials.
  - These ratings are included into Emsi's automation risk in identifying high-level work activities, which are then evaluated to indicate whether the work could be replaced in the future by automation.

- ***Frey and Osborne***
  - Professors of the University of Oxford in the United Kingdom, they are leading experts and writers on automation and the future of work. In 2013, they published a paper entitled *"The Future of Employment: How Susceptible Are Jobs to Computerisation?".*
  - Their research, combined with O*NET labor data, are the key parts of Emsi automation risk data.

Sources: Emsi, O*NET, and the University of Oxford

Fayette Current and Projected Automation Risk

Summary

Seven 2-Digit occupation levels have an automation index above 100:

- Food Preparation and Serving Related Occupations (SOC 35)
- Building and Grounds Cleaning and Maintenance Occupations (SOC 37)
- Farming, Fishing, and Forestry Occupations (SOC 45)
- Construction and Extraction Occupations (SOC 47)
- Installation, Maintenance, and Repair Occupations (SOC 49)
- Production Occupations (SOC 51)
- Transportation and Material Moving Occupations (SOC 53)
- Military-only Occupations (NAICS 55)

Currently, about 16,100 members of the Fayette County workforce are in a career that is at an above average risk for replacement by automation. This is nearly 37.0% of the workforce population in Fayette County.

Using Emsi projected workforce data, the projected population of Fayette County workforce at risk rises over 16,500 and increases to about 37.7% of the workforce.

Fayette Current and Projected Automation Risk

Existing Occupation Wage Comparison	Fayette County Jobs	% Share of Workforce	2024 Fayette County Jobs	% Share of Workforce	Automation Index
Total Occupation (Average Wage)	**43,536**	-	**43,888**	-	-
Management Occupations (SOC 11)	1,794	4.12%	1,840	4.19%	85.2
Business and Financial Operations Occupations (SOC 13)	1,349	3.10%	1,391	3.17%	89.7
Computer and Mathematical Occupations (SOC 15)	668	1.53%	691	1.58%	83.5
Architecture and Engineering Occupations (SOC 17)	691	1.59%	730	1.66%	86.9
Life, Physical, and Social Science Occupations (SOC 19)	201	0.46%	218	0.50%	84.7
Community and Social Service Occupations (SOC 21)	1,144	2.63%	1,205	2.75%	82.3
Legal Occupations (SOC 23)	260	0.60%	268	0.61%	84.3
Education, Training, and Library Occupations (SOC 25)	2,282	5.24%	2,190	4.99%	85.8
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	448	1.03%	437	1.00%	89.8
Healthcare Practitioners and Technical Occupations (SOC 29)	2,940	6.75%	2,975	6.78%	88.3
Healthcare Support Occupations (SOC 31)	1,494	3.43%	1,590	3.62%	95.6
Protective Service Occupations (SOC 33)	747	1.72%	747	1.70%	99.0
Food Preparation and Serving Related Occupations (SOC 35)	4,078	9.37%	4,060	9.25%	126.1
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	1,389	3.19%	1,346	3.07%	122.7
Personal Care and Service Occupations (SOC 39)	2,560	5.88%	2,772	6.32%	95.8
Sales and Related Occupations (SOC 41)	4,589	10.54%	4,357	9.93%	94.9
Office and Administrative Support Occupations (SOC 43)	6,112	14.04%	5,933	13.52%	99.1
Farming, Fishing, and Forestry Occupations (SOC 45)	100	0.23%	91	0.21%	110.0
Construction and Extraction Occupations (SOC 47)	2,601	5.97%	2,807	6.40%	123.3
Installation, Maintenance, and Repair Occupations (SOC 49)	2,179	5.00%	2,199	5.01%	108.9
Production Occupations (SOC 51)	2,335	5.36%	2,319	5.28%	113.9
Transportation and Material Moving Occupations (SOC 53)	3,418	7.85%	3,573	8.14%	110.5
Military-only Occupations (NAICS 55)	156	0.36%	149	0.34%	N/A

Source: Emsi 2020

Quality of Life

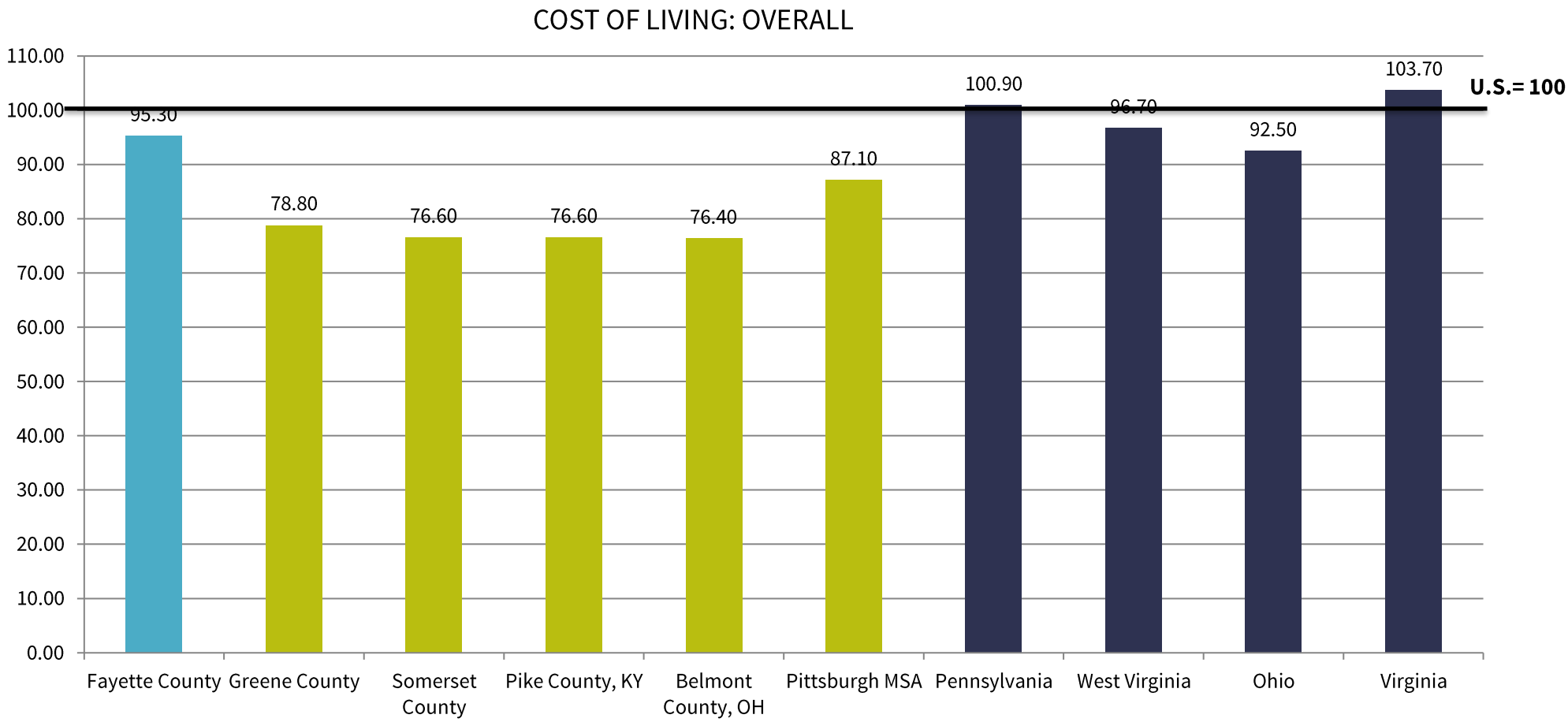
AdyAdvantage™
STRATEGY MATTERS

Quality of Life

KEY TAKEAWAYS

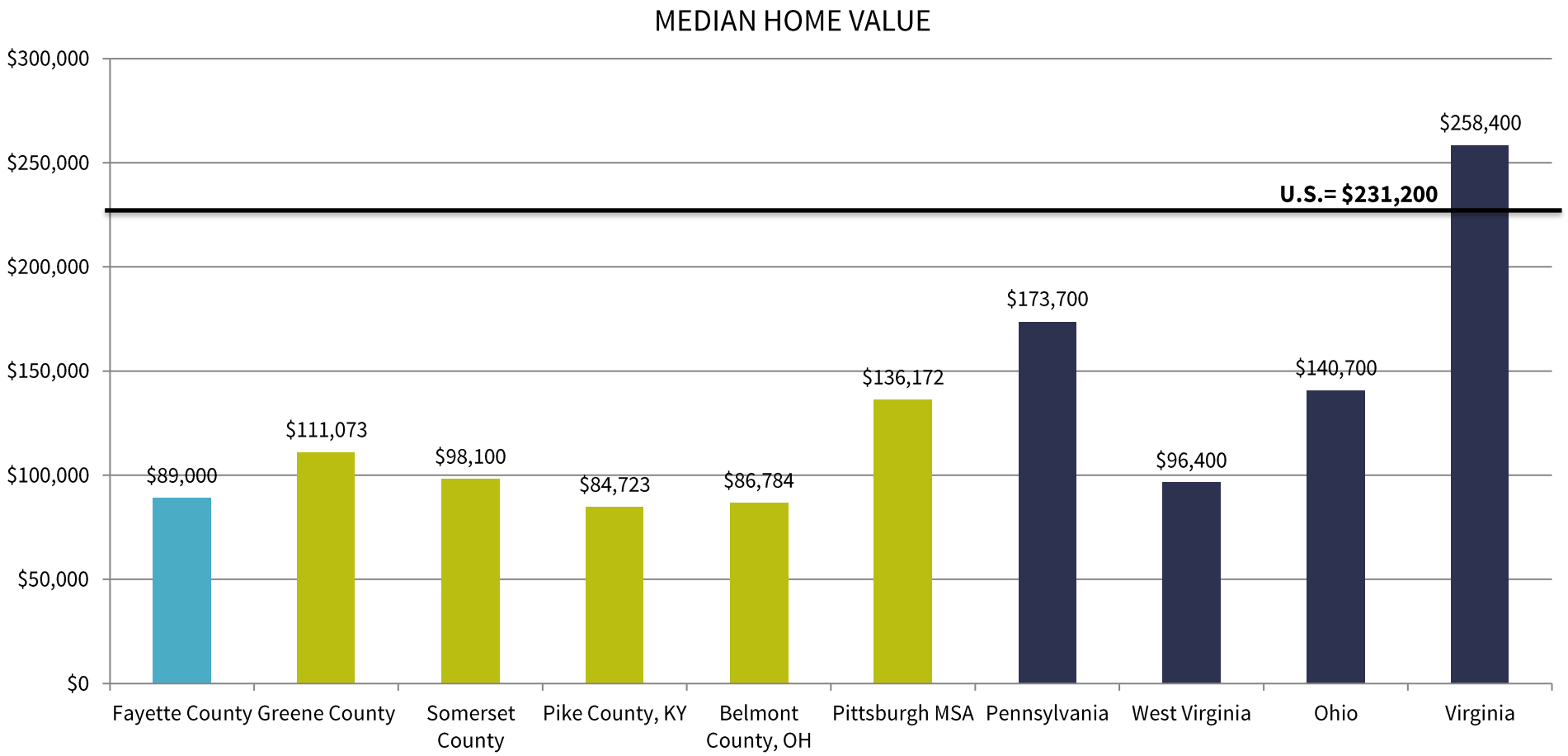
- Cost of living and cost of housing are comparable to the Pittsburgh MSA, and higher than the neighboring Pennsylvania comparison counties. This was noted by employers in the area as a key economic asset, as well as a strong business recruitment tool.
- Median Home Value was consistently lower than nearby comparison regions and is comparable to other Appalachian counties.
- Home ownership rate is comparable to other regions and is higher than the comparison states and the national average.
- Housing vacancy is higher than the Pittsburgh MSA, but lower than most Appalachian Counties that Fayette County was compared to. Generally, Fayette County is fared better than other Appalachian Counties in this regard.
- Employers and stakeholders mentioned the region's natural beauty and recreational opportunities, such as the Ohio Pyle and Laurel Highlands, the Nemacolin Resort, and the Frank Lloyd Wright history in the region.

Quality of Life



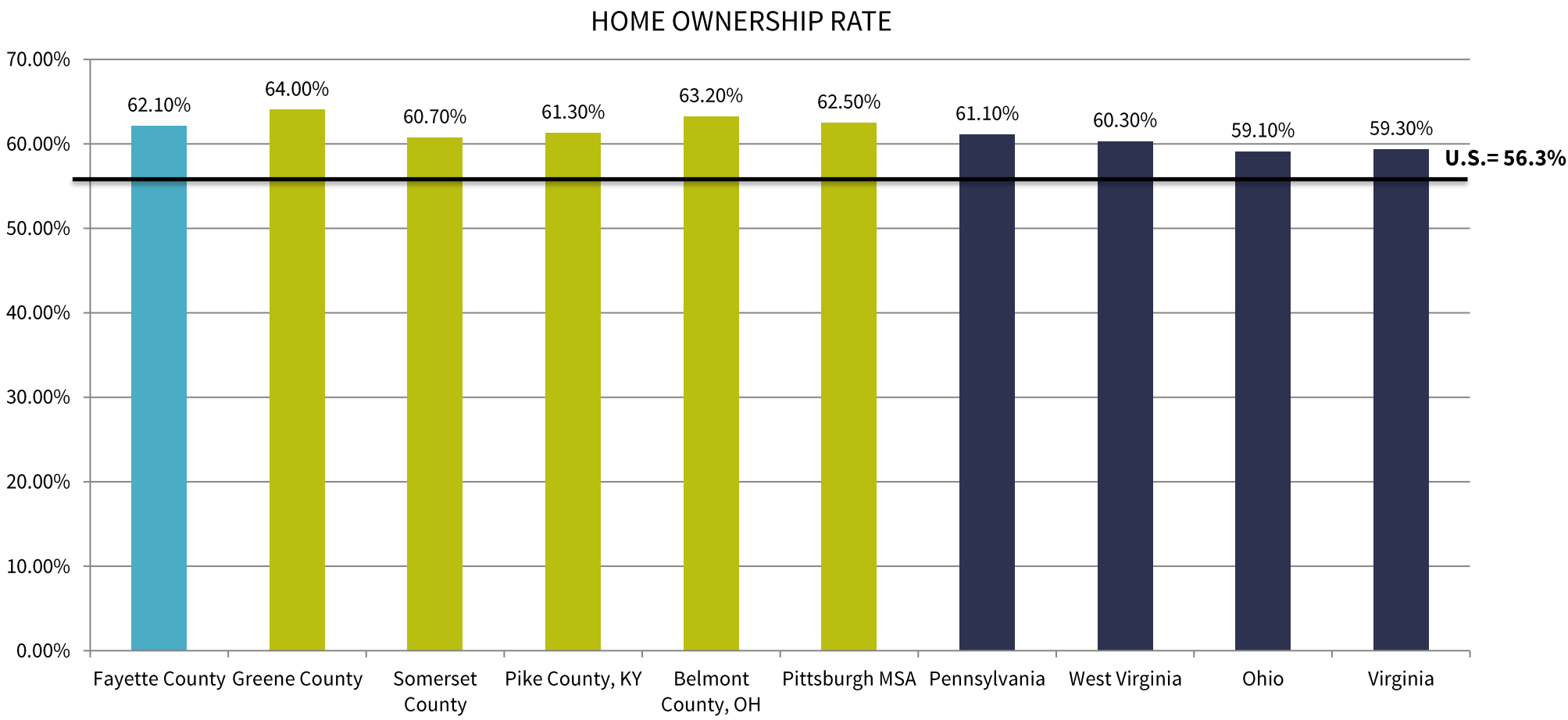
Source: Emsi, 2019

Quality of Life



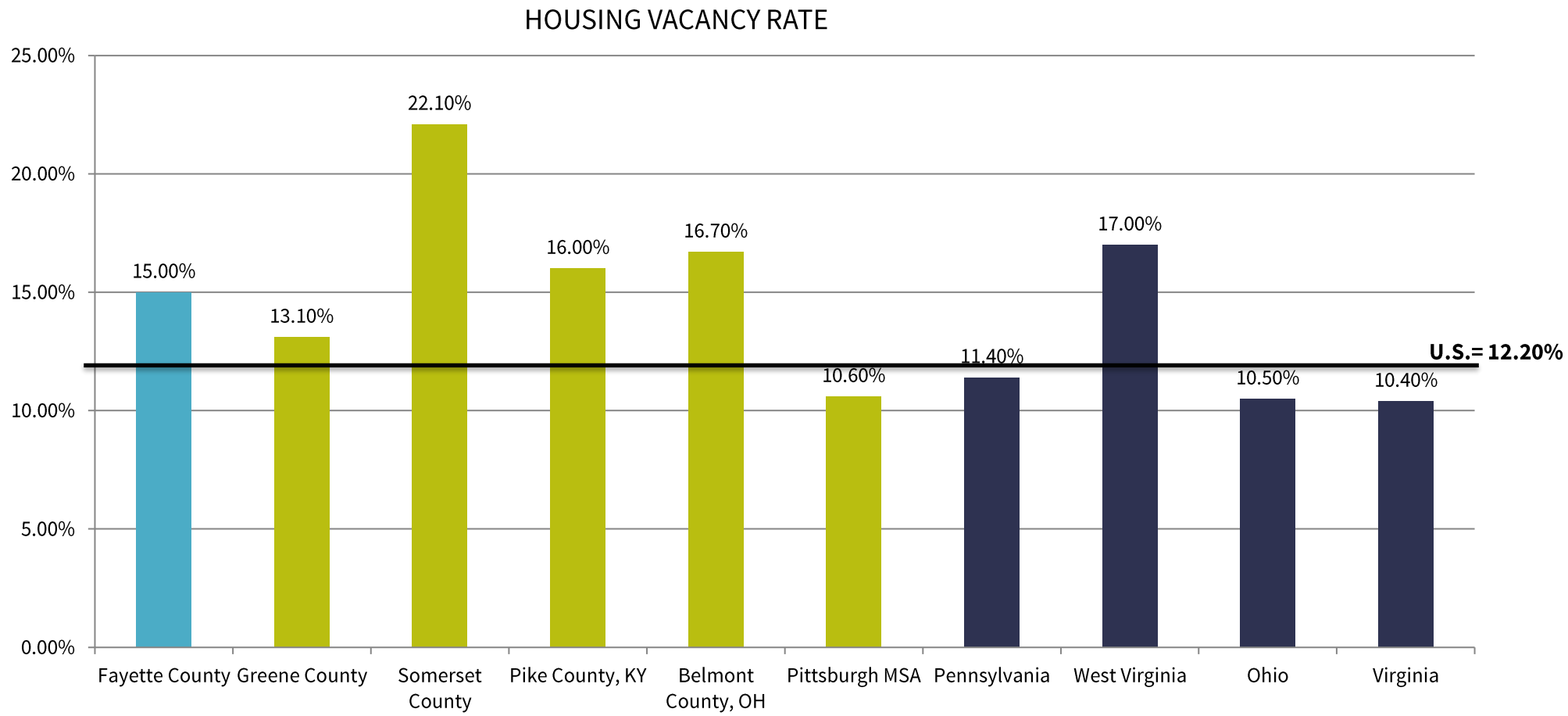
Source: Sperling's Best Places, 2019

Quality of Life



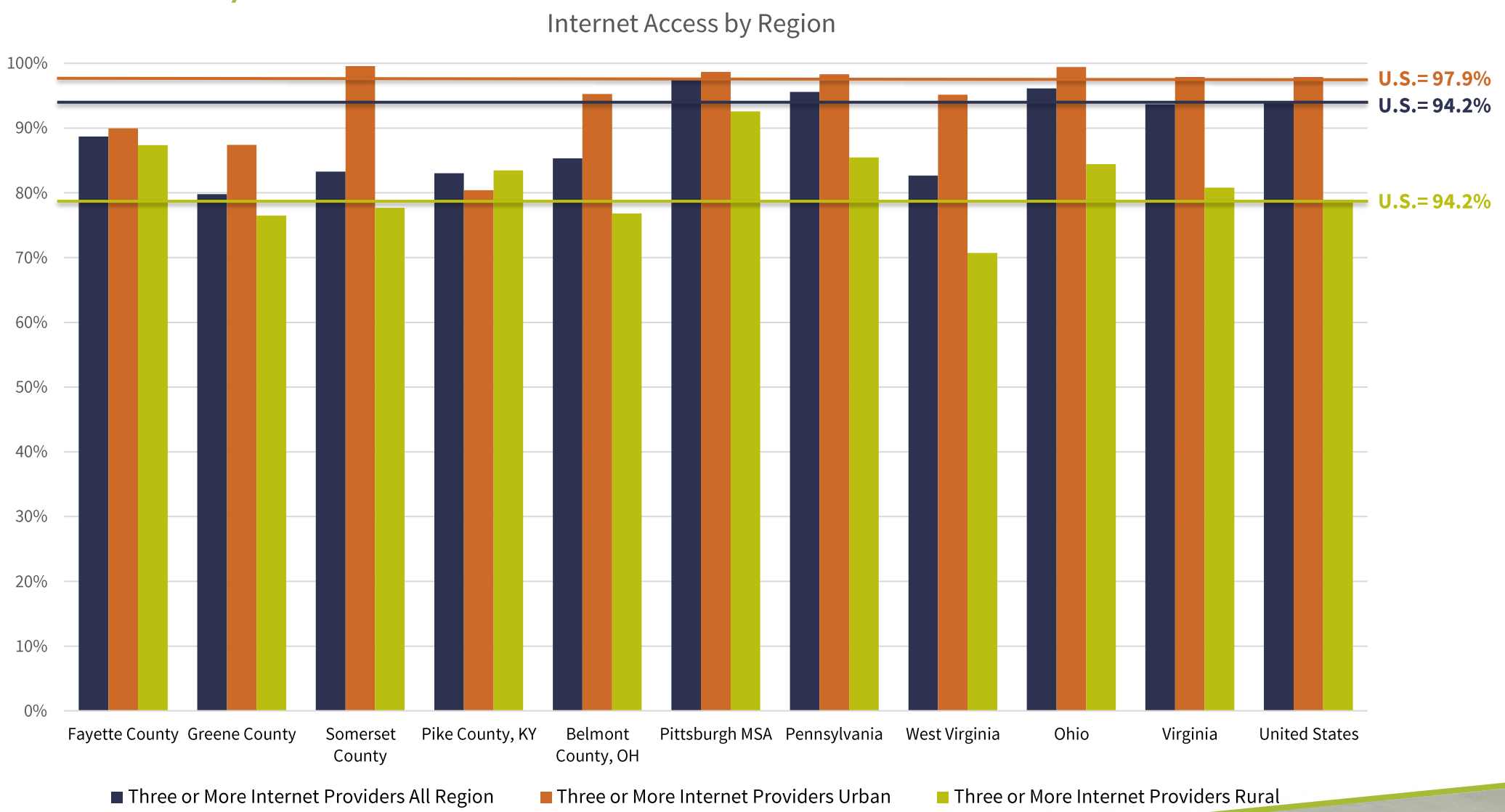
Source: Sperling's Best Places, 2019

Quality of Life



Source: Sperling's Best Places, 2019

Quality of Life



Source: Federal Communications Commission

Quality of Life

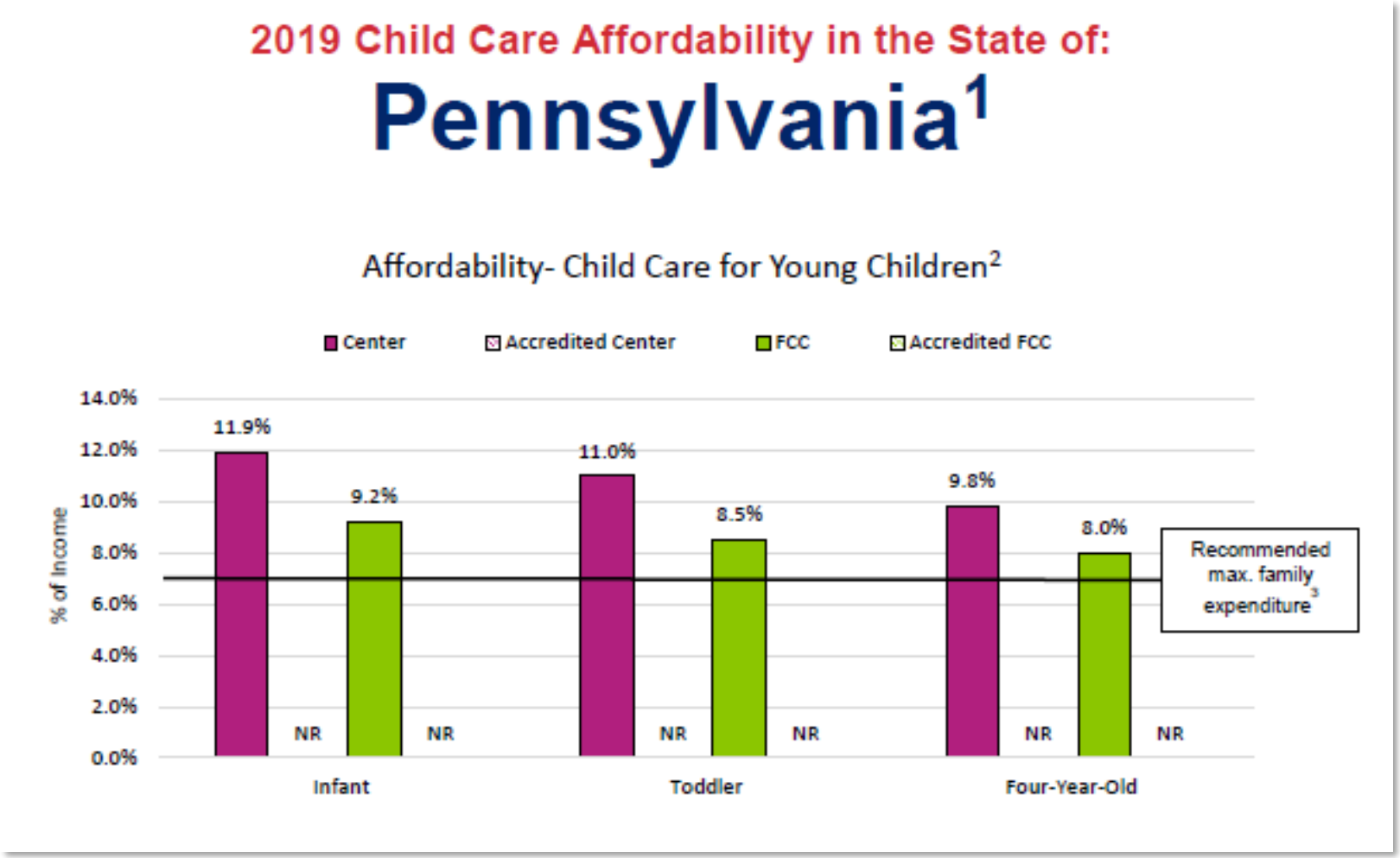
ACCESS & AFFORDABILITY OF CHILDCARE IN PENNSYLVANIA

	Pennsylvania	United States
Percentage of children age birth to 4 years living in poverty	21%	22%
Percentage of families that are single parent families.	32%	32%
Families in poverty	22%	25%
Total children under the age of 6 potentially needing childcare	565,087	14,957,537
Total spaces/slots available in childcare programs	Data Not Reported	
Potential Shortage	**Unknown**	

Source: ChildcareAware.org

Quality of Life

ACCESS TO CHILDCARE IN PENNSYLVANIA



FCC = Family Child Care: Children cared for in home-based childcare provided within a caregiver's home.

Source: ChildcareAware.org

Section 3: Stakeholder Engagement

AdyAdvantage™
STRATEGY MATTERS

Stakeholder Engagement

INTRODUCTION

Ady Advantage and Fay Penn conducted virtual stakeholder engagement the week of November 2nd, 2020. This included a virtual windshield tour to review available sites and buildings, as well as interviews with employers and key stakeholders. The following list includes the organizations that participated in this process.

ORGANIZATIONS
BPU Investments
Brooke's Block party
Connellsville Chamber
Cole B's Juice Bar
Fayette Chamber
Flow Data
Johnson Matthey
Jolt Bike
Joyce's Jewelers
Lizzie's Boutique
PTC

Stakeholder Engagement

INTERVIEW QUESTIONS

As part of our interview process, Ady Advantaged interviewed each participant along a question guide provide a framework for the discussions that were to be had, as well as capture general input and feedback on opportunities and challenges within the region. Participants were asked the following seven questions:

1. What is your/your company's history in Fayette County?

2. What are the region's greatest economic assets?

3. What are the region's greatest economic challenges or barriers to growth?

4. What industries or clusters do you think are a good fit for Fayette County?

5. How has COVID-19 impacted the region?

6. What other comments or reflections do you have about the economic environment and your interactions with the regional economic development organization, Fay-Penn EDC?

Stakeholder Engagement

WHAT IS YOUR/YOUR COMPANY'S HISTORY IN FAYETTE COUNTY?

The majority of participants have a lived in the region for a major part of their lives and are thoroughly invested in the area. For those companies who located in the county from outside of the region, reasons included access to natural resources, access to educational institutions and overall costs of doing business.

- Born and raised here, family founded the business in 1989.
- I am from the area, and I have a role in the chamber.
- I am involved in the chamber and have owned my owned my own business for the past seven years.
- I moved to Fayette County 13 years ago and have founded a few businesses here.
- I opened my own retail business in 2016.
- I own a couple of businesses in Fayette County.
- Our home base for the company is in Texas, but I built this office in Fayette County from scratch. We located here because our business supports the natural resource industry.
- We are located in Uniontown. When we decided to relocate, three locations came to mind, Fayette was one of them. Needed access to universities, and Fayette County was within proximity to six with strong engineering, including California University of Pennsylvania, led the way on program accreditation on computer science and engineering Costs to staff were important. Much cheaper to staff here than in downtown Boston because of cost of living.
- We located our company here in 2008, our current plant opened in 2009. We chose to locate here via committee from Philadelphia region when we needed more room in manufacturing.

Stakeholder Engagement

WHAT ARE THE REGION'S GREATEST ECONOMIC ASSETS?

Participants identified many economic assets to the region, with the most cited being the overall business climate and ease of doing business, location and access, quality of life and tourism, educational assets and overall affordability to live and do business. Respondents especially noted the location provided access to many higher education institutions, as well as access to supply, markets, and travelers.

Business Friendly Environment

- Business parks.
- Entrepreneurial spirit.
- Fay Penn has been key to bringing us here, and also helped us expand, look for new opportunities.
- Good people with good intentions, if you can get your product or service in front of these people, they are willing to support you.
- Great economic development support, lots of grants going on.
- Great opportunities to develop professional relationships here.
- Growth in Uniontown, 21 new business opened up in Uniontown.
- Industry diversity.
- Land available in industrial parks.
- Local businesses, specifically restaurants, are a perk here, lots of local restaurants as opposed to franchises.
- Retail, stores, and hotels are popping up in Uniontown.
- Tax incentives pushed it over for this location, looking at other locations in NC and TN, when PA heard of considerations of new plant elsewhere, they stepped in with new incentives.
- Taxes.
- The people, there are some amazing people here that drive economic development and business leaders.
- Utilities, land, infrastructure.
- Water, power electric are available.

Location and Access

- Centrally located, but also a lot of rural land.
- Geographic area.
- Adequate transportation access to Philadelphia from here.
- Infrastructure, land available and easy access to the highway, close to the turnpike and 118.
- Location. You can be in so many areas: 3 hours from many major metros.
- New highway 43 access to Pittsburgh and Morgantown.
- Nice location to Pittsburgh, Morgantown.
- Proximity to customers and suppliers: couldn't be somewhere like AZ, customers and suppliers in IN, NY, SC.
- Rail.
- Strategic location.

Stakeholder Engagement

WHAT ARE THE REGION'S GREATEST ECONOMIC ASSETS?

Quality of Life and Tourism

- It is a place where people want to move here, get a job, and stay at. A lot of folks for us didn't want to move to California or downtown Pittsburgh, they wanted to stay in a rural environment.
- Area is safe, crime numbers are lower.
- County culture: family life, friend life culture. Where people want to be a part of a larger team and family.
- Get all four seasons.
- Great small community.
- Mountains: Laurel Highlands, Ohio Pyle.
- Outdoor activities, Frank Lloyd Wright.
- Quality of life.
- Safety – not a lot of natural disasters, etc.
- Hiking trail that brings people in.
- Tourism is an asset and a challenge, lower paying jobs.
- Tourism is strong here, beautiful place.
- You see people from Pittsburgh, Morgantown coming here to visit.

Workforce and Education Assets

- Good schools – more STEM programs, robotics in junior high, etc.
- Availability of resources and workers.
- Local talent: colleges university: they have a fully automated line with sensitive instruments.
- Needed access to universities, and Fayette County was within proximity to six with strong engineering, including California University of Pennsylvania, led the way on program accreditation on computer science and engineering.
- Universities with strong talent and technology programs.

Overall Affordability

- Cost of living.
- Cost of living is a great asset.
- Cost of living is definitely something to leverage, we can make business here happen for a lot cheaper.
- Cost of living is low, cost of life is reasonable.
- Costs to staff were important, its much cheaper to staff here than in downtown Boston because of cost of living.
- Low cost of living was attractive.
- Pay rates are lower for companies, payroll is lower, but you have to be competitive.
- Relatively inexpensive.
- Taxes.

Stakeholder Engagement

WHAT ARE THE REGION'S GREATEST ECONOMIC CHALLENGES/BARRIERS TO GROWTH?

Participants identified workforce and business environment challenges as their primary barriers to growth. Other challenges noted by participants were business real estate and perceptions of the county. Additionally, participants were directly asked if broadband, childcare, housing, and transportation were barriers to the region, with broadband and housing cited as the most challenging of those issues in the region.

Workforce Challenges

- Candidates for electrician, auto and automation employees.
- Certain skill level of workers. Can get high school diploma, college grads too, but technical grad schools are the hard ones: electrician, etc. They are pairing up with the trade schools and recruiting them before graduating; hiring them on part time, internship, co-op etc. Had a good plan in place but then COVID happened.
- Finding qualified workers.
- Finding people that want to work.
- Finding workforce that is reliable, is trustworthy, and has the skills we need.
- Lowest demographic counties in the state about income and educated young professionals, young professionals are leaving the area.
- Out of 17 employees, only six live in Fayette County, the rest are in Pittsburgh, Morgantown and other surrounding counties.
- Schools have consolidated due to population change trending downwards and aging school buildings.
- Some manufacturers can't find qualified workers, there's a big group of them that pay minimum wage.
- Strong vetting process, as well as benefits and pay is competitive.
- Struggling to hire locally, had to recruit out of state. Lot of recruits from Texas A&M, but it's nice to hire locally.
- Talent, they have an extremely hard time recruiting, it's hard to get and have talent.
- Tourism is an asset and a challenge, because with it comes lower paying jobs.
- Trouble finding diverse talent, 90% of our talent is Caucasian males, 8% Caucasian females, and 2% the rest. Our company aims to be diverse, get different points of view, but the region does not support more diversity.
- Trying to hire engineers is a challenge, the younger generation wants to live in the city.
- Trying to recruit from WVU, Penn State, still had to appeal more than the big cities.
- We don't have high tech, high paying jobs, but also can't fill minimum wage jobs.
- We don't have the most appealing jobs.

Stakeholder Engagement

WHAT ARE THE REGION'S GREATEST ECONOMIC CHALLENGES/BARRIERS TO GROWTH?

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Business Environment Challenges

- Cost – Hard to come up with a price point that makes it work financially.
- COVID assistance had been tough, a lot of funding was gone in 12 hours in Pennsylvania.
- Disconnect between the people with the age, money, and experience, and the people who are actually buying: people in 50s,60s, entrepreneurial, they have influence, and they want the community to thrive, but they are not necessarily in touch with the younger generation and what they want to do.
- Funding can be limited, banks want to give money, but a lot of people/younger people could use some guidance brining their ideas to fruition, barrier between ideas and funding.
- Great program ideas, but not enough promotion and action of their programs.
- Lack of communication.
- People complaining in these meetings and no action.
- People just don't know how to get to the resources.
- Used to have wealthy, older philanthropists who have either passed away or are no longer active.
- Utilities and rent.

Perceptions of the County

- "Guilty by association", people have a perception of Uniontown.
- Negative perceptions of Fayette county: a lot of negative jokes are made about the county, but once people come here an experience it, they are extremely impressed.
- Stigma/perception of the region.
- Unfortunately has a bad reputation, and a bad nickname.

Business Real Estate

- Real estate is a challenge, a lot of really great storefronts that are vacant or rent is ridiculous.
- People are just holding on to properties, or not renting them out while there are a lot of ideas being shot down.
- Utilities and rent.

Stakeholder Engagement

WHAT ARE THE REGION'S GREATEST ECONOMIC CHALLENGES/BARRIERS TO GROWTH?

CONTINUED: Participants identified workforce and business environment challenges as their primary barriers to growth. Other challenges noted by participants were business real estate and perceptions of the county. Additionally, participants were directly asked if broadband, childcare, housing, and transportation were barriers to the region, with broadband and housing cited as the most challenging of those issues in the region.

Housing

- Housing – It is a seller's market. Apartments are tough, we don't really have many and those that we do have don't advertise their vacancy, rent, etc.
- Housing – finding apartments, townhouses, or affordable houses that aren't old is a challenge, some new construction, most older homes need work.
- Housing is an issue, it's hard to find a good townhome or rental property, you can find a fixer-upper or get into a newer development.
- Housing – Plenty of housing, it's just old: it's an old coal town. I feel its affordable, but I came from a higher expense area, other people may find it less so. Less availability on rentals of decent quality.
- Housing availability and quality is a bit of an issue here and there, not a lot of available and attractive apartments that are close.
- Rental housing is expensive.
- Senior housing is an issue.

Broadband

- Broadband is a challenge in the mountain areas, groups are working on it.
- Broadband – its ok, only one provider, they have a monopoly on it.
- Broadband is an issue, even in my building, was using satellite, it was terrible, Atlantic broadband is the only fiber company.
- Broadband – Depends on where you live. Uniontown has DSL (from where he lived). Could get it through the cable company. Fiber in the nicer areas. Not much access in the rural areas. Had to have fiber brought out to our last office.
- Cell services are also bad.
- We are always trying to expand broadband, but southern part of the county is very underdeveloped with utilities, etc. even though it is so close to Morgantown.
- We had a dedicated fiber optic line installed; we had some issues getting approval and getting it set up, but Verizon was supportive, costs of the service are a little steep.

Stakeholder Engagement

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Transportation

- Access to the airport is hard.
- Located really ideally, but still kind of far away from metros, airports, etc.
- No Uber, cab, or Lyft, we have to have people come down from Pittsburgh to come down, pick them up, and drive them around.
- Still lacking in some ways – infrastructure that is declining – roads, bridges, etc.
- Parking is an issue in Connellsville.
- Transportation isn't needed.
- Transportation is not great, county bus transport exists but I'm not familiar with it, no taxi services, Uber, or Lyft services here.
- Transportation isn't a strong point; we front this when customers come visit us.
- Uber is hit or miss, may have to wait 30 minutes.
- We have a local bus system, but not enough routes.
- We have a bus system, think it is probably underutilized. We have an Amtrack stop.

Childcare

- Childcare is an issue – there aren't that many facilities, we have lost a few and prices have gone up.
- Childcare – From what I know, they are happy with their childcare of the people he knows. Probably few high-quality options in Fayette County.
- Childcare – not an issue that I have heard about.
- No issues heard of with childcare, everyone seems to find a daycare without issue. Our company even offers some programs to help with it.

Stakeholder Engagement

WHAT INDUSTRIES OR CLUSTERS DO YOU THINK ARE A GOOD FIT FOR FAYETTE COUNTY?

The primary opportunity highlighted by those interviewed were higher-skilled, advanced manufacturing industries due to the workforce talent coming out of nearby universities. Solving workforce constraint issues would also be a major factor in growth and success for the region. Additionally, the natural resources and natural landscape of the area provide industries in tourism and oil & gas.

Advanced Manufacturing

- Education on electric vehicles and repairs, electrical engineering technology.
- Industry with on-the-job training and competitive pay along with benefits and insurance.
- Hands-on skills.
- Higher skilled jobs – if we had them, we could pull more talent in.
- New-age vehicles.
- Technical businesses, manufacturing businesses, there's a company that builds radar units down the road, we could do flexible flat screen TVs/monitors.
- The region produces a high amount of technical talent, it's not something folks are readily aware of, but we find a lot of high-end talent. Some issues with big hiring pushes, but our branch ranks highly in technical stability and competence for problem solving.
- TSI has expanded – they make touch screens, so they have the skills there.
- We need more manufacturing – this is what our workforce is capable of. Employers are always looking for welders.
- Would be great to see more manufacturing – we have the blue-collar workforce for that and the sites for that.

Tourism

- Bike trail.
- Connellsville has a huge opportunity to become a tourist town.
- Continue to capitalize on Laurel Highlands, Ohio Pyle, and Nemacolin Woodlands Resort.
- Resort, tourism 5-star resort.
- Travel tourism is fantastic around here.
- When tourists come into our store, they are happy to find us, but they aren't what keeps you open, and currently there is almost no where to shop and do value-added tourism.

Stakeholder Engagement

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Workforce Opportunities
- Getting people to hire and retain is challenging, wages are extremely competitive, motivating workers is hard.
- Need more opportunities for people to have employment, there's job here, but people aren't working.
- Struggle getting electricians, trade school technicians, a lot of businesses struggling to get those in Fayette County.
- There's a lot of "We're Hiring" signs.
- There struggles to get people to take job, and a lot people on welfare in the area.

Natural Resources
- Energy, big natural gas, and coal driven area.
- Oil and gas brought on a big boom, not going away entirely, but less and less of an opportunity.

Other Comments/Ideas
- Agriculture, although there are a lot of struggles with this industry.
- Finance and insurance – Very old industry, not over saturated.
- Hospital partnered with WV University.
- The county seat has the hospital and is centrally located.
- We have a few companies that are not small businesses, but we could use more.
- We have a lot of empty buildings.
- With a lot of brick-and-mortar stores closing in metro areas, we have an opportunity to take up market share at our store, where we have been successful even through COVID.

Stakeholder Engagement

HOW HAS COVID-19 IMPACTED THE REGION?

For many interviewed, Fayette County has done relatively well and has even had some business growth during this time. For others, the challenges of workforce have been increased due to several factors, and certain industries have been hit hard by the shut down. For those who were directly impacted by the drop of economic activity, being able to adapt was the key to their business survival. The psychological affects of the pandemic were also noted.

Business Recovery

- Business has been okay. We are lucky, people shop on site and in app and pickup in store. We steam the clothes after they are tried on.
- Business has been busy since June.
- Fayette is not a high-risk area for COVID, our facility in the metro area is having higher unavailability.
- Not as densely populated, hasn't impacted it as drastically.
- Real estate is doing well right now.
- Some companies are doing really well, such as Walmart, accountants, insurance agents, etc.
- Still decent amount of people employed in our industry.
- Successful with PPE, Fay Penn was there in helping us secure that, 100% on top of it.
- Tourism is still doing well: outdoors related tourism benefited.
- We don't have a lot of counts like Allegheny.
- We have had 21 new businesses in 2020. Just had a ribbon cutting last week. Everything from electric bike company, two boutique shops, at least three restaurants, barber shop, etc.
- We have seen the rebound and we are recovering.
- We have been fine, we are a fairly lean site, but you still need a certain quantity to run the site.

Adapting to Change

- If you weren't on social media, chances are you're not in business right now.
- For some businesses it is hard to be COVID compliant and adapt.
- People who can be online are becoming more strategic, thoughtful, we're own operation smarter.
- Social distancing, cleaning, and measures taken.
- Some changed what they were manufacturing, such as masks.
- Some people are into adaptation and change, while there's a strong group that is not.
- The gap between older and younger people and the technology is noticeable.
- Transitioning to online and takeout was easy for me, but you have to be fluent on the internet.
- We have all our employees working from home, which is challenging because we are used to that co-locating mindset. We have tried to use technology, but we miss being able to take employees out to lunch, doing outreach programs in the community, and different comradery efforts we can't do right now. Can't go out to restaurants as employee groups, get out together, etc., and we see it affecting our morale, as a company.

Stakeholder Engagement

HOW HAS COVID-19 IMPACTED THE REGION?

For many interviewed, Fayette County has done relatively well and has even had some business growth during this time. For others, the challenges of workforce have been increased due to several factors, and certain industries have been hit hard by the shut down. For those who were directly impacted by the drop of economic activity, being able to adapt was the key to their business survival. The psychological affects of the pandemic were also noted.

Exacerbated Workforce Issues

- COVID has probably played a role in our current workforce issues, people choosing between coming to the office and working versus other alternatives.
- Employee availability has been largely unaffected, very few individuals who couldn't come in.
- For manufacturers, workforce is their biggest challenge. If kids aren't in school, then parents can't work what they used to in terms of hours, on-site, etc.
- Industries with on-the-job training and competitive pay along with benefits and insurance are doing best.
- Lapse in workforce whenever there are cases.
- The free money and extra unemployment hurt Fayette county, I know several employers couldn't get their workers and crews back.
- Wages are extremely competitive, motivating sure workers is hard.

Business Operating Challenges

- Had to stop operations during the decreased economic activity.
- Supply chains were disrupted, I know people who were out of stock.
- Supply shortages are always going to be an issue – basic parts manufacturing so that we could be a bit more self-dependent.
- The grants were very selective, gone in 12 hours, still more opportunity for additional grant funding.
- The logistics of our supply chain was hit hard, as all the raw materials, and most of the manufacturing are done overseas.

Industries Hit Hard

- Restaurants are taking a beating.
- Before, people were scared to go out, impacted the restaurants, big part of community, impacted the restaurants and hotels, which were booming over the last 10 years, now are struggling.
- Take out has done well, but restaurants and bars are really struggling.
- Oil and gas industry took a hit.
- Coal took another hit, and it's not in a great spot.
- Restaurants are taking a hit as well.

Mental Impacts

- People are scared, I think the banks will lend you money, but not everyone is comfortable taking out a loan.
- The mental aspect of COVID: domestic abuse, depression, just people getting down.

Stakeholder Engagement

WHAT OTHER COMMENTS OR REFLECTIONS DO YOU HAVE ABOUT THE ECONOMIC ENVIRONMENT AND YOUR INTERACTIONS WITH THE REGIONAL ECONOMIC DEVELOPMENT ORGANIZATION, FAY PENN?

Respondents spoke highly of the work Fay-Penn EDC does and what the organization has done for their businesses. Some had suggestion to address issues in the region, and others felt that more people need to know about all the resources that Fay-Penn EDC provides.

- Bring business into the tourist side of things, promote all the great things in the area, Fay Penn tends to steer toward the industrial commercial side, maybe integrate together for a talent/attraction pitch.
- Fay Penn has been extremely useful for me and my businesses, but I think a lot of people don't know what free resources they provide.
- I don't know if this is in their purview, but all the general "old coal towns" that had their heyday 40 years ago, a lot of their main streets looked dated, need a refresh to make it more appealing to talent.
- I loved the internship program from Fay Penn, the program ended, but I still keep in touch with those interns. If that program could be brought back, it would be helpful.
- I still don't know what all Fay Penn does, I think business owners need to be more involved in all these organizations, identify the gaps, and help out.
- In my eyes Fay Penn has been great.
- Perhaps we should focus on updating the housing stock, its mostly old, low-quality housing stock.
- We work with Fay Penn at the local level, very good interactions. They are receptive, always asking questions about what they can do, and they are very responsive.

Section 4: Asset Maps

AdyAdvantage™
STRATEGY MATTERS

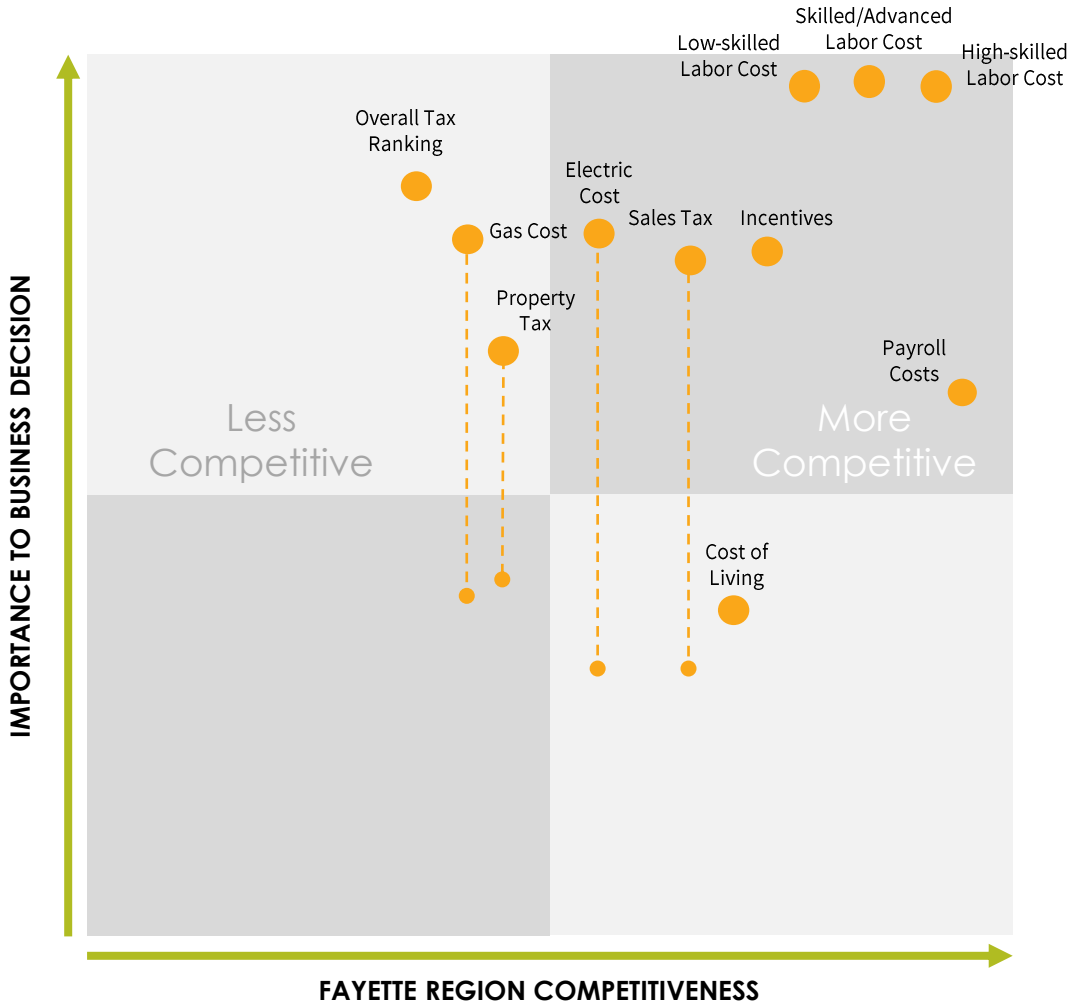
Asset Maps

GENERAL BUSINESS COSTS ASSET MAP COMMENTS

The asset map to the right depicts Fayette County and surrounding region's competitiveness compared to the State of Pennsylvania, surrounding states, as well as the United States as a whole.

- Labor costs in the core and greater region are lower than average for most industries compared to the National Average and most comparison regions.
- Pennsylvania generally has less competitive tax rankings relative to its neighboring states. The exception is the Sales Tax rank, which is better all other comparison regions.
- While industrial gas and electric costs in Pennsylvania are higher than most of the other comparison states, Fayette County's rates are competitive with or lower than all comparison states.
- Fay Penn EDC and its localities offer the standard mix of financing and incentives. Pennsylvania offers a wide variety of incentives, with a number tailored towards job creation and capital investment.
- The cost of living in Fayette County is 4.7% lower than the national average but is higher than comparison regions. Cost of living in Fayette County is lower than the state of Pennsylvania average.

GENERAL BUSINESS COSTS ASSET MAP



Note: Dotted lines down represent the variability of importance of each factor depending on the industry.

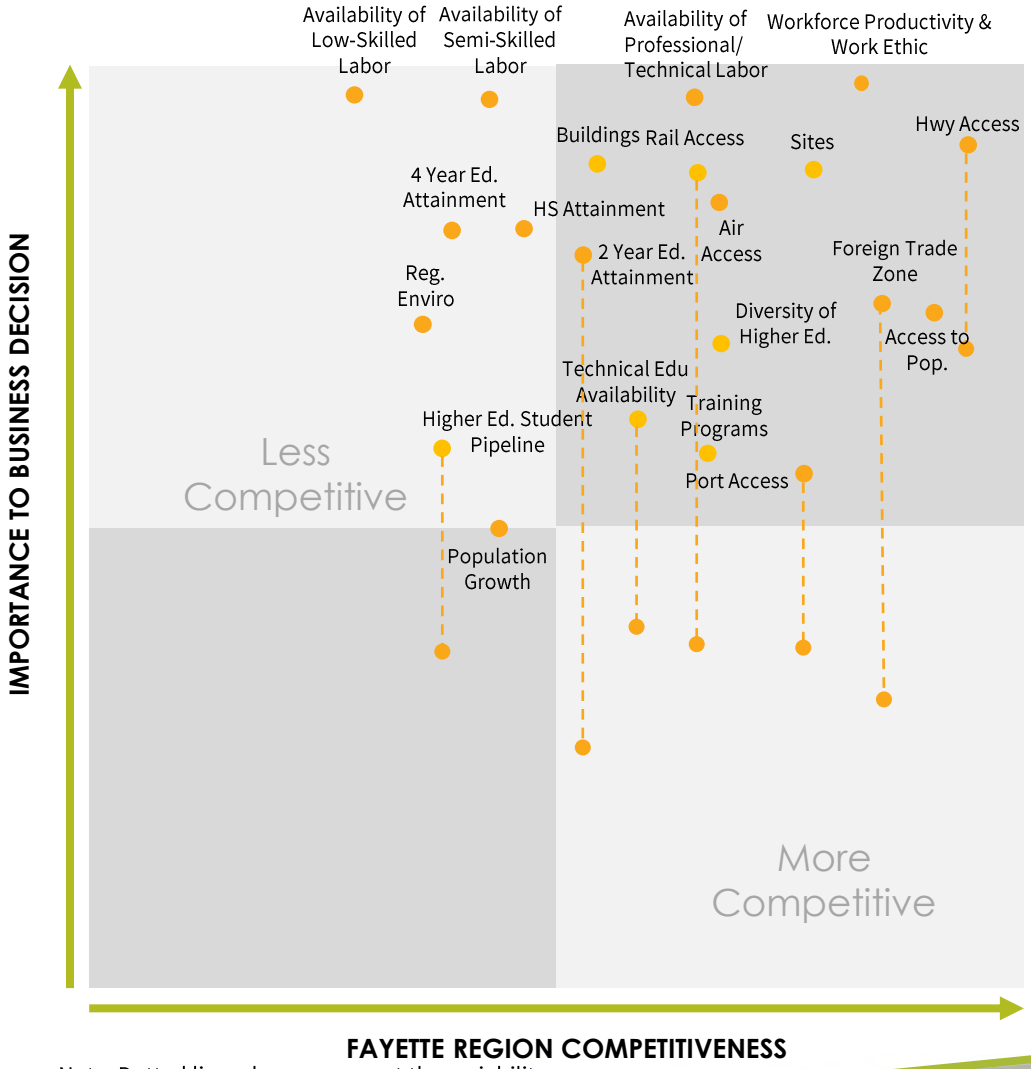
Asset Maps

GENERAL BUSINESS CONDITIONS ASSET MAP COMMENTS

The asset map to the right depicts the Fayette County and greater region's competitiveness compared to the Pennsylvania, surrounding states, as well as the United States as a whole.

- There has been negative population growth over in Fayette County, decreasing by 3.2% since 2014. The state of Pennsylvania has experienced population growth of 0.2% since 2014.
- Availability of labor was noted by employers as a key challenge, regardless of labor type. Skilled labor seemed to be the most acute challenges, as most of the industries require these positions.
- Fayette County has access to multiple community colleges, tech schools, training programs, and four-year universities with graduate opportunities in Fayette County and the surrounding region.
- Work ethic was not often cited as an issue. The major barrier to workforce was competing labor wages and costs for positions in high demand.
- Fayette County has higher 2-year attainment rate than the Pennsylvania average and the national average, as well as most surrounding states. However, Fayette County has lower high school, 4-year degree, and grad school attainment than most comparison regions and the state of Pennsylvania average.
- Fayette County has 19 sites and 21 buildings listed on their GIS platform on the EDC website, with a wide range of building and site size and locations across the county. Some sites and buildings had railroad access, and most were near a major highway.
- The nearest major commercial airport is the Pittsburgh International Airport, which is just over 60 miles from Uniontown.
- Fayette County has port access at the Port of Pittsburgh in Pittsburgh. The Port provides access to the three rivers Allegheny, Monongahela, and Ohio. The Monongahela River runs directly through Fayette County, and the nearest terminal is the McGrew Welding Terminal, located in Donora, PA.
- Fayette County has access to two Class I rail lines, the CSX and Norfolk Southern, as well as the short line railroad, the Pennsylvania Railroad.

GENERAL BUSINESS CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry.

Section 4: Target Industry Sector Analysis

AdyAdvantage™
STRATEGY MATTERS

Target Industry Analysis

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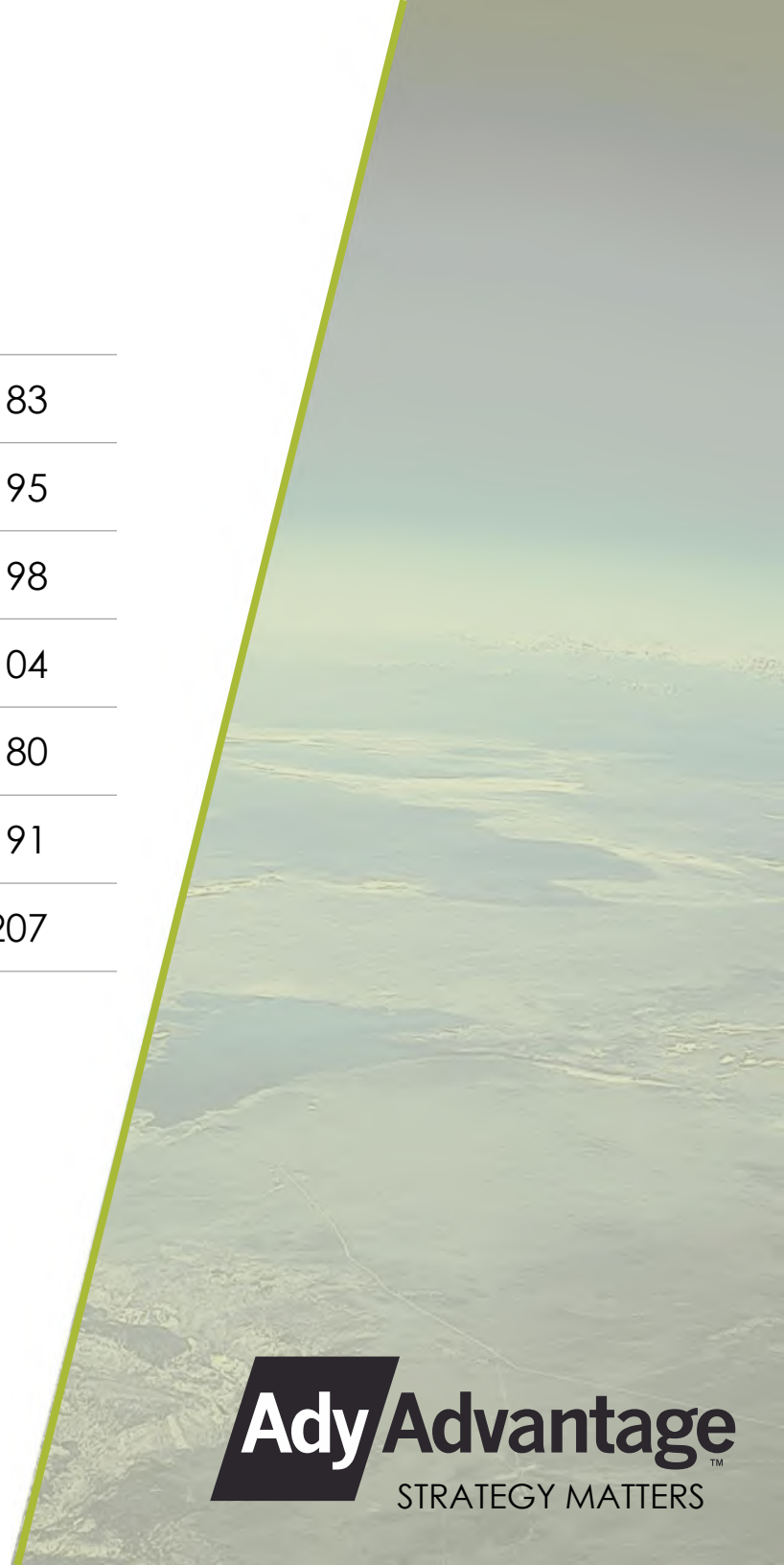

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Economic Base Analysis

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Economic Base Analysis

INTRODUCTION

In order to gain some background knowledge on Fayette County and the region's current industry and occupation make-up, Ady Advantage conducted analysis at the 2-digit NAICS code level (industry). The data that we look at in the following section include:

- Number of employees
- Concentration (location quotient)
- Wages
- Past five-year growth
- Future expected five-year growth

The data found on the following pages was obtained through EMSI. Note that while EMSI provides information on industries and their impact on the local economy, it does not include identities of specific firms. Additional information about EMSI's data and how its used for economic development are provided below.

- EMSI Information on Data Descriptions and Sources: http://www.economicmodeling.com/data/usa-data/
- EMSI for Economic Development: http://www.economicmodeling.com/our-clients/emsi-for-economic-developers/

Economic Base Analysis

RESULTS PRESENTED ON GRAPHS

The various bubble charts, shown on the following pages, graphically show this first-level industry analysis for Fayette County (Core Region). The core region will be compared to the Greater Region, which is defined as the following counties (all in Pennsylvania unless noted): Allegheny, Beaver, Cambria, Greene, Monongalia (WV), Somerset, Washington, and Westmoreland.

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

- *Stars (Gold):* Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- *Mainstays (Blue):* Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- *Opportunities (Green):* Positive Growth / Below Average Concentration: These industries have been growing but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- *Reactive (Red):* Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.

Economic Base Analysis

GEOGRAPHIC PARAMETERS

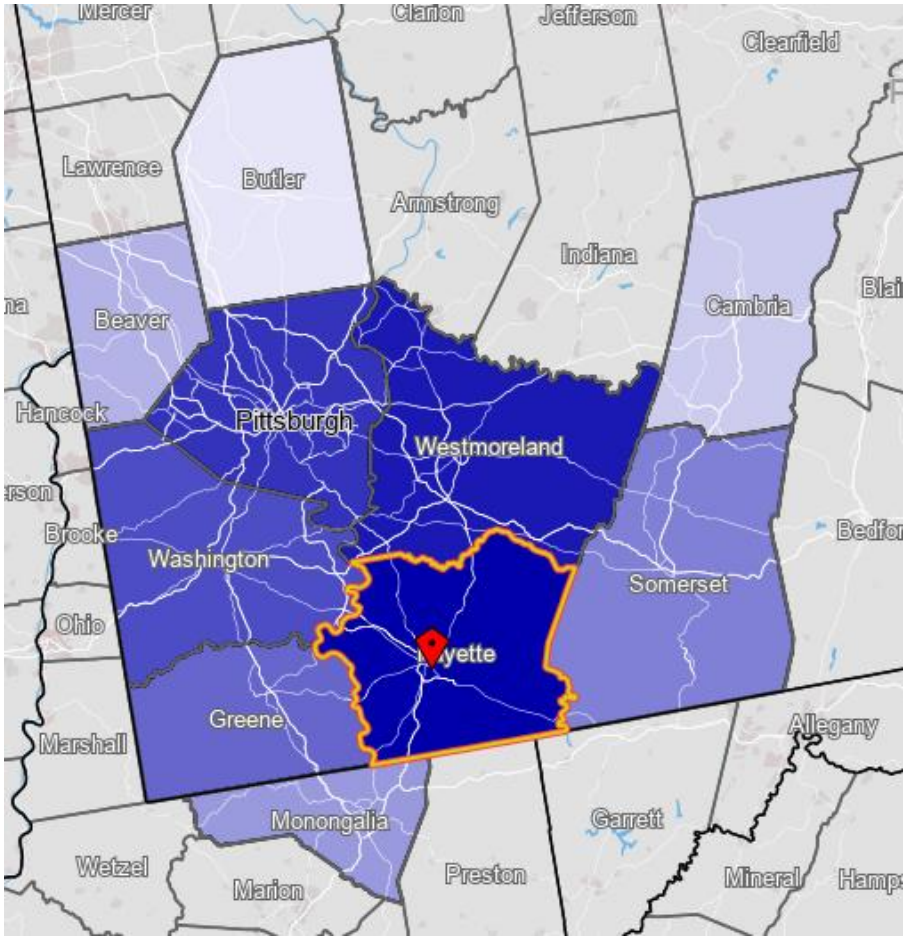
Dark Blue = Core Region

- Fayette County

Shaded Blue = Greater Region (The portion that is part of the immediate Fayette County laborshed)

- Allegheny County (Pittsburgh)
- Beaver County
- Cambria County
- Greene County
- Monongalia County (WV)
- Somerset County
- Washington County
- Westmoreland County

For purposes of data analysis in this section, all the counties colored on the map are included in the target industry analysis, to better capture value-add and supply chain opportunities.

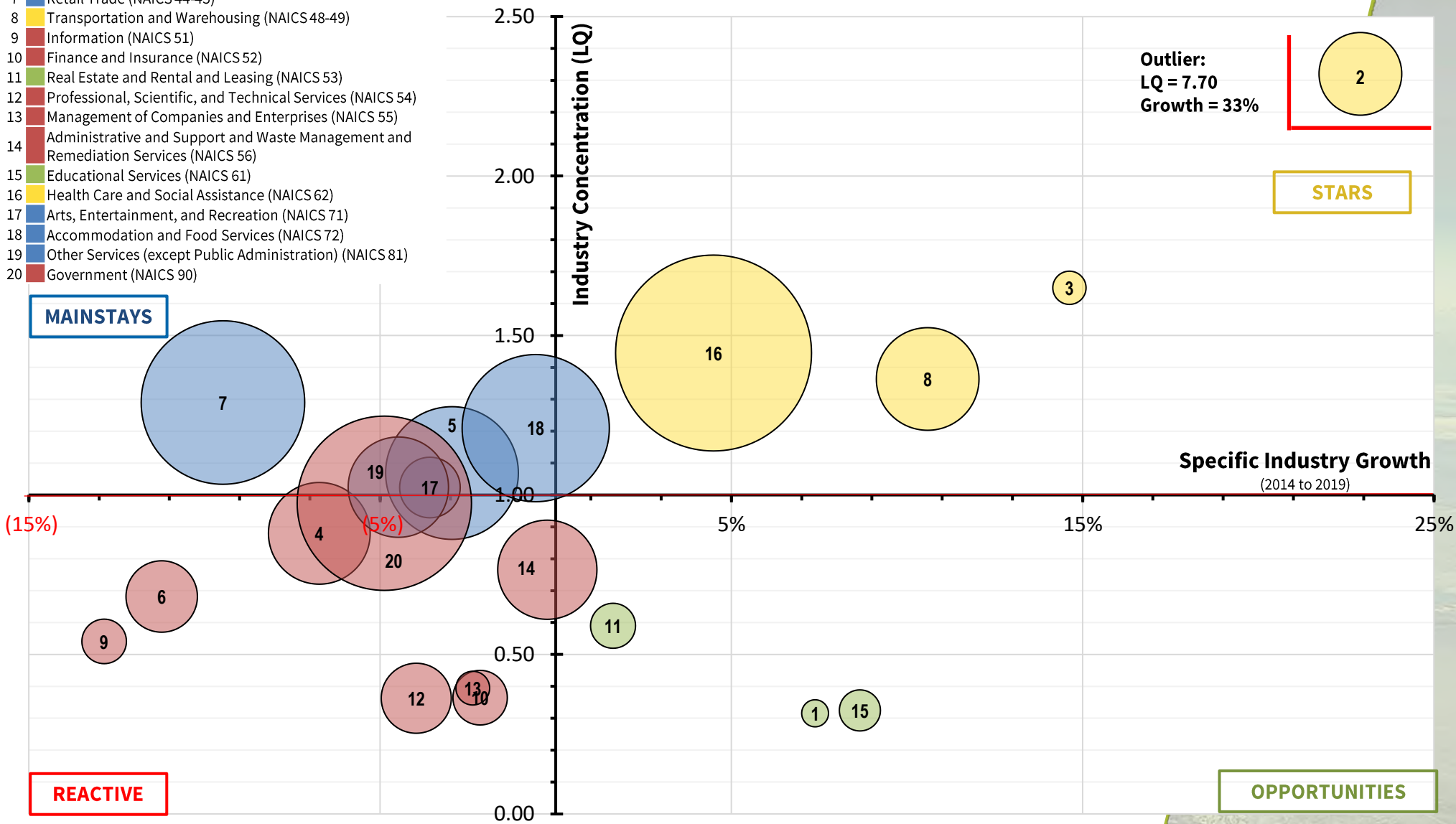


Source: onthemap.com

Economic Base Analysis

CORE REGION INDUSTRY ANALYSIS

1 Agriculture, Forestry, Fishing and Hunting (NAICS 11)
2 Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
3 Utilities (NAICS 22)
4 Construction (NAICS 23)
5 Manufacturing (NAICS 31-33)
6 Wholesale Trade (NAICS 42)
7 Retail Trade (NAICS 44-45)
8 Transportation and Warehousing (NAICS 48-49)
9 Information (NAICS 51)
10 Finance and Insurance (NAICS 52)
11 Real Estate and Rental and Leasing (NAICS 53)
12 Professional, Scientific, and Technical Services (NAICS 54)
13 Management of Companies and Enterprises (NAICS 55)
14 Administrative and Support and Waste Management and Remediation Services (NAICS 56)
15 Educational Services (NAICS 61)
16 Health Care and Social Assistance (NAICS 62)
17 Arts, Entertainment, and Recreation (NAICS 71)
18 Accommodation and Food Services (NAICS 72)
19 Other Services (except Public Administration) (NAICS 81)
20 Government (NAICS 90)



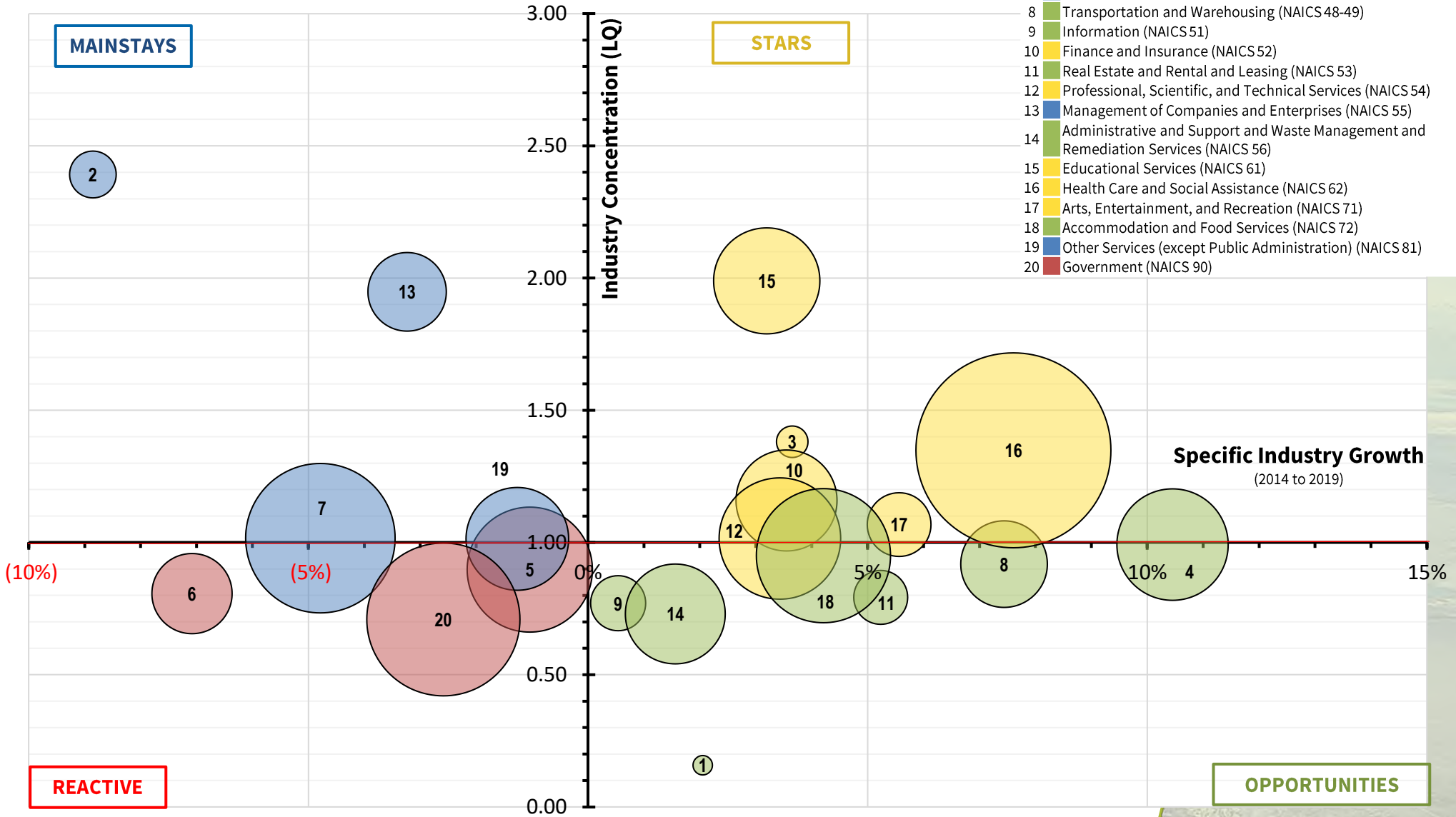
Circle Size = Number of employees in Fayette County
Source: EMSI 2020

Total Employees in Fayette County: 43,536

= 1,500 employees

Economic Base Analysis

GREATER REGION INDUSTRY ANALYSIS



Circle Size = Number of employees in Greater Region
Source: EMSI 2020

Total Employees in Greater Region: 1,376,899

= 45,000 employees

Economic Base Analysis

COMPARISON OF INDUSTRY CONCENTRATION

There are some marked differences in concentration between the core region and the greater region. It is instructive to examine these differences because it helps indicate how Fayette County may fit within the larger region. Note: clusters where the core region is more highly concentrated are highlighted in green.

The following industries have a significantly higher concentration (>0.2) in the core region than that of the greater region:

- Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- Utilities (NAICS 22)
- Retail Trade (NAICS 44-45)
- Transportation and Warehousing (NAICS 48-49)
- Accommodation and Food Services (NAICS 72)
- Government (NAICS 90)

The following industries in which the core region has a significantly high concentration (>1.0) are:

- Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- Utilities (NAICS 22)
- Manufacturing (NAICS 31-33)
- Retail Trade (NAICS 44-45)
- Transportation and Warehousing (NAICS 48-49)
- Health Care and Social Assistance (NAICS 62)
- Arts, Entertainment, and Recreation (NAICS 71)
- Accommodation and Food Services (NAICS 72)
- Other Services (except Public Administration) (NAICS 81)

It should also be noted that the greater had a significantly higher concentration (>0.2) than the core region in the following industries:

- Information (NAICS 51)
- Finance and Insurance (NAICS 52)
- Real Estate and Rental and Leasing (NAICS 53)
- Professional, Scientific, and Technical Services (NAICS 54)
- Management of Companies and Enterprises (NAICS 55)
- Educational Services (NAICS 61)

Economic Base Analysis

Existing Industry Concentration Comparison	Core Region Total Employment	Greater Region Total Employment	Core Region Location Quotient	Greater Region Location Quotient
Total All Industries	**43,536**	**1,376,899**	N/A	N/A
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	160	2,537	0.32	0.16
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	1,424	13,991	7.70	2.39
Utilities (NAICS 22)	243	6,443	1.65	1.38
Construction (NAICS 23)	2,175	77,554	0.88	0.99
Manufacturing (NAICS 31-33)	3,679	97,708	1.07	0.90
Wholesale Trade (NAICS 42)	1,084	40,559	0.68	0.81
Retail Trade (NAICS 44-45)	5,581	139,103	1.29	1.02
Transportation and Warehousing (NAICS 48-49)	2,214	47,148	1.36	0.92
Information (NAICS 51)	427	19,262	0.54	0.77
Finance and Insurance (NAICS 52)	636	63,924	0.36	1.16
Real Estate and Rental and Leasing (NAICS 53)	437	18,561	0.59	0.79
Professional, Scientific, and Technical Services (NAICS 54)	1,040	92,095	0.36	1.01
Management of Companies and Enterprises (NAICS 55)	248	38,730	0.39	1.95
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	2,071	62,470	0.77	0.73
Educational Services (NAICS 61)	364	70,541	0.32	1.99
Health Care and Social Assistance (NAICS 62)	8,003	236,253	1.44	1.35
Arts, Entertainment, and Recreation (NAICS 71)	780	25,733	1.02	1.07
Accommodation and Food Services (NAICS 72)	4,528	112,478	1.21	0.95
Other Services (except Public Administration) (NAICS 81)	2,110	66,032	1.02	1.01
Government (NAICS 90)	6,331	145,777	0.97	0.71

Source: EMSI 2020

Core Region LQ > than Expanded Greater Region (by ≥ 0.2)
Core Region LQ < than Expanded Greater Region (by ≥ 0.2)
Core Region LQ and Expanded Greater Region LQ are not significantly different

Economic Base Analysis

COMPARISON OF INDUSTRY WAGES

In seventeen of the industries, the core region's wages are lower when compared to the greater region, the Pennsylvania average and the national average (highlighted in green). Of those industries in which the core region's wages are not lower than all the comparison regions, one of the core region's wages are lower than two of the three comparison regions (highlighted in yellow), and two of the core region's wages are higher than two of the three comparison regions (highlighted in red).

There may be opportunities in those industries in which the core region is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.

Economic Base Analysis

Existing Industry Wage Comparison	Core Region Wages, Salaries & Proprietor Earnings	Greater Region Wages, Salaries & Proprietor Earnings	Pennsylvania Wages, Salaries & Proprietor Earnings	U.S. Wages, Salaries & Proprietor Earnings
Total Industry (Average Wage)	**$46,537**	**$62,251**	**$63,555**	**$65,382**
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	$37,035	$36,490	$40,925	$38,793
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	$80,863	$100,167	$87,624	$103,777
Utilities (NAICS 22)	$97,400	$108,380	$117,132	$109,247
Construction (NAICS 23)	$45,747	$62,277	$61,848	$57,749
Manufacturing (NAICS 31-33)	$51,050	$64,811	$63,082	$67,959
Wholesale Trade (NAICS 42)	$51,883	$70,355	$80,790	$77,220
Retail Trade (NAICS 44-45)	$26,747	$29,885	$29,778	$32,288
Transportation and Warehousing (NAICS 48-49)	$52,479	$51,379	$48,572	$53,601
Information (NAICS 51)	$50,701	$88,865	$89,748	$109,665
Finance and Insurance (NAICS 52)	$51,531	$85,205	$96,370	$107,046
Real Estate and Rental and Leasing (NAICS 53)	$34,180	$62,247	$61,558	$58,833
Professional, Scientific, and Technical Services (NAICS 54)	$53,681	$84,825	$93,390	$92,649
Management of Companies and Enterprises (NAICS 55)	$70,042	$125,741	$131,246	$122,745
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	$30,442	$37,226	$36,649	$39,502
Educational Services (NAICS 61)	$34,412	$40,611	$44,469	$41,345
Health Care and Social Assistance (NAICS 62)	$39,309	$52,379	$51,270	$50,216
Arts, Entertainment, and Recreation (NAICS 71)	$25,520	$41,569	$31,792	$36,945
Accommodation and Food Services (NAICS 72)	$20,181	$18,655	$19,231	$21,710
Other Services (except Public Administration) (NAICS 81)	$27,684	$28,840	$29,619	$31,303
Government (NAICS 90)	$49,848	$55,116	$56,001	$55,054

Source: EMSI 2020

Core Region wages < Greater Regions, Pennsylvania and U.S. wages

Core Region wages > Two of three of the comparison region. Wages

Core Region wages < Two of three of the comparison region wages

Economic Base Analysis

COMPARISON OF INDUSTRY GROWTH

Looking at growth by industry cluster provides some indication of potential strengths of an industry in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2014 - 2019), as well as the projected five-year growth (2019 - 2024). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to five percent in the respective period and was highlighted red where growth was less than or equal to negative five percent.

The industries that have experienced and will experience growth of over five percent in the core region include:

- Transportation and Warehousing (NAICS 48)
- Educational Services (NAICS 61)

Of the industries that did not experience significant growth, one industry is projected to experience significant growth over the next 5-year period:

- Health Care and Social Assistance (NAICS 62)

Transportation and Warehousing (NAICS 48), Educational Services (NAICS 61), and Health Care and Social Assistance (NAICS 62) have experienced have experienced growth at some level and are expected to continue to grow.

Industries which have experienced a significant decline of over five percent in the past 5-year period and are projected to continue to significantly decline over the next 5-year period in the core region include:

- Retail Trade (NAICS 44-45)
- Information (NAICS 51)

Economic Base Analysis

Past 5-Year Growth (2014-2019) and Projected 5-Year Growth (2019-2024)

Existing Industry Growth Comparison	Core Region (2014 - 2019)	Core Region (2019 - 2024)	Greater Region (2014 - 2019)	Greater Region (2019 - 2024)	Pennsylvania (2014 - 2019)	Pennsylvania (2019 - 2024)	U.S. (2014 - 2019)	U.S. (2019 - 2024)
Total All Industries	**1%**	**1%**	**1%**	**1%**	**4%**	**3%**	**7%**	**5%**
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	7%	(7%)	2%	(1%)	1%	1%	(0%)	1%
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	33%	36%	(9%)	14%	(23%)	8%	(19%)	7%
Utilities (NAICS 22)	15%	3%	4%	(2%)	10%	(0%)	2%	3%
Construction (NAICS 23)	(7%)	(3%)	10%	5%	10%	4%	18%	6%
Manufacturing (NAICS 31-33)	(3%)	1%	(1%)	(2%)	1%	(2%)	5%	0%
Wholesale Trade (NAICS 42)	(11%)	4%	(7%)	(5%)	(4%)	4%	1%	2%
Retail Trade (NAICS 44-45)	(9%)	(8%)	(5%)	(5%)	(3%)	(3%)	4%	2%
Transportation and Warehousing (NAICS 48)	11%	9%	7%	1%	19%	6%	22%	7%
Information (NAICS 51)	(13%)	(15%)	1%	(3%)	1%	(0%)	5%	3%
Finance and Insurance (NAICS 52)	(2%)	(6%)	4%	2%	3%	2%	8%	4%
Real Estate and Rental and Leasing (NAICS 53)	2%	(2%)	5%	2%	6%	2%	11%	4%
Professional, Scientific, and Technical Services (NAICS 54)	(4%)	(3%)	3%	4%	9%	5%	13%	8%
Management of Companies and Enterprises (NAICS 55)	(2%)	4%	(3%)	2%	3%	3%	11%	5%
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	(0%)	0%	2%	(0%)	5%	3%	9%	6%
Educational Services (NAICS 61)	9%	10%	3%	6%	8%	7%	10%	8%
Health Care and Social Assistance (NAICS 62)	4%	6%	8%	8%	10%	10%	13%	10%
Arts, Entertainment, and Recreation (NAICS 71)	(4%)	1%	6%	3%	9%	4%	14%	6%
Accommodation and Food Services (NAICS 72)	(1%)	(2%)	4%	3%	6%	5%	13%	6%
Other Services (except Public Administration) (NAICS 81)	(4%)	(2%)	(1%)	(2%)	2%	1%	6%	4%
Government (NAICS 90)	(5%)	(3%)	(3%)	(3%)	(2%)	(2%)	3%	2%

Source: EMSI 2020

Industry growth greater than or equal to five percent in the respective region and time frame.

Industry growth is less than or equal to negative five percent in the respective region and time frame.

Target Industry Analysis Overview

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Target Industry Analysis - Overview

OVERVIEW

The following target industry analysis follows the same format as the analysis in the economic base. However, this section focuses on the industries identified as primary job creators and economic drivers for the region. Our analysis does not tend to include those industries that follow the economy or are consumer-driven, such as retail and health care. In order to determine which specific industries offer Fayette County the greatest opportunities for business development and attraction, a 6-digit NAICS code analysis was conducted on the following industries within the Greater Region. Reasoning for the inclusion of each of these particular industries is also provided.

- **Mining, Quarrying, & Oil and Gas Extraction (NAICS 21) –** This industry has historically been an important industry in the region and specifically in Fayette County where there is a high concentration and significant past five-year growth. While there are challenges associated with this industry, we included in the analysis to see which specific subsectors are growing and identify any potential value-added opportunities.
- **Manufacturing (NAICS 31-33) –** While this was found to be a mainstay in the county and the greater region, many stakeholders noted an opportunity to attract additional advanced manufacturing to the area. The regional educational assets could support this industry. Focus will be on those higher value manufacturing industries. We consider this industry to be a primary job creating industry.
- **Transportation and Warehousing (NAICS 48-49)** - This industry has experienced significant growth in both the County, the Greater Region and nationally and is projected to continue to grow in both. There are also significant distribution opportunities that can be tied into other target industries.
- **Professional Scientific, and Technical Services (NAICS 54)** – While this industry has been declining in the county, it has seen high growth in the greater region. This industry offers opportunities for economic diversification in the region and with the access to regional educational institutions, there is an opportunity for Fayette County to capture some of that talent.

As stated above, this analysis will show, for example, which sub-industries within each industry are driving the overall industry, which are growing opportunities, and which are declining. This exercise helps provide a deeper understanding of the region and identify possible niche markets, allowing us to more accurately recommend the industries that are the best fit for the region.

Regional Market Assessment

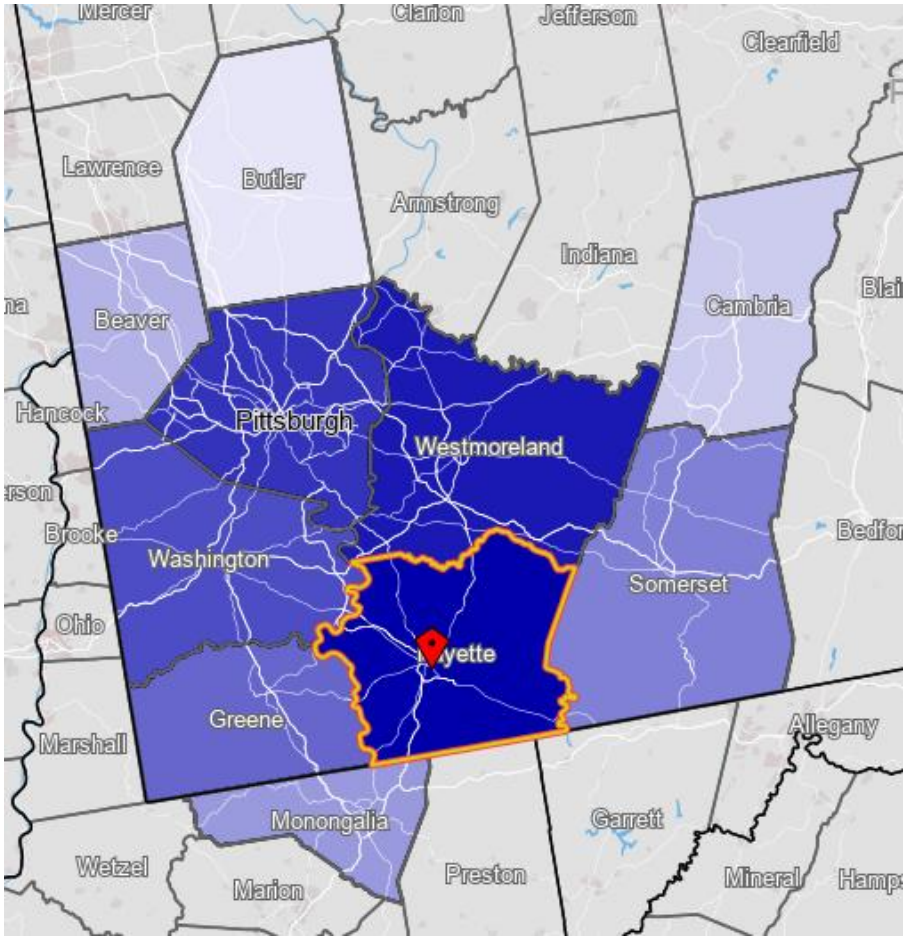
GEOGRAPHIC PARAMETERS

Dark Blue = Core Region

- Fayette County

Shaded Blue = Greater Region (The portion that is part of the immediate Fayette County laborshed)

- Allegheny County (Pittsburgh)
- Beaver County
- Cambria County
- Greene County
- Monongalia County (WV)
- Somerset County
- Washington County
- Westmoreland County



For purposes of data analysis in this section, all the counties colored on the map are included in the target industry analysis, to better capture value-add and supply chain opportunities.

Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

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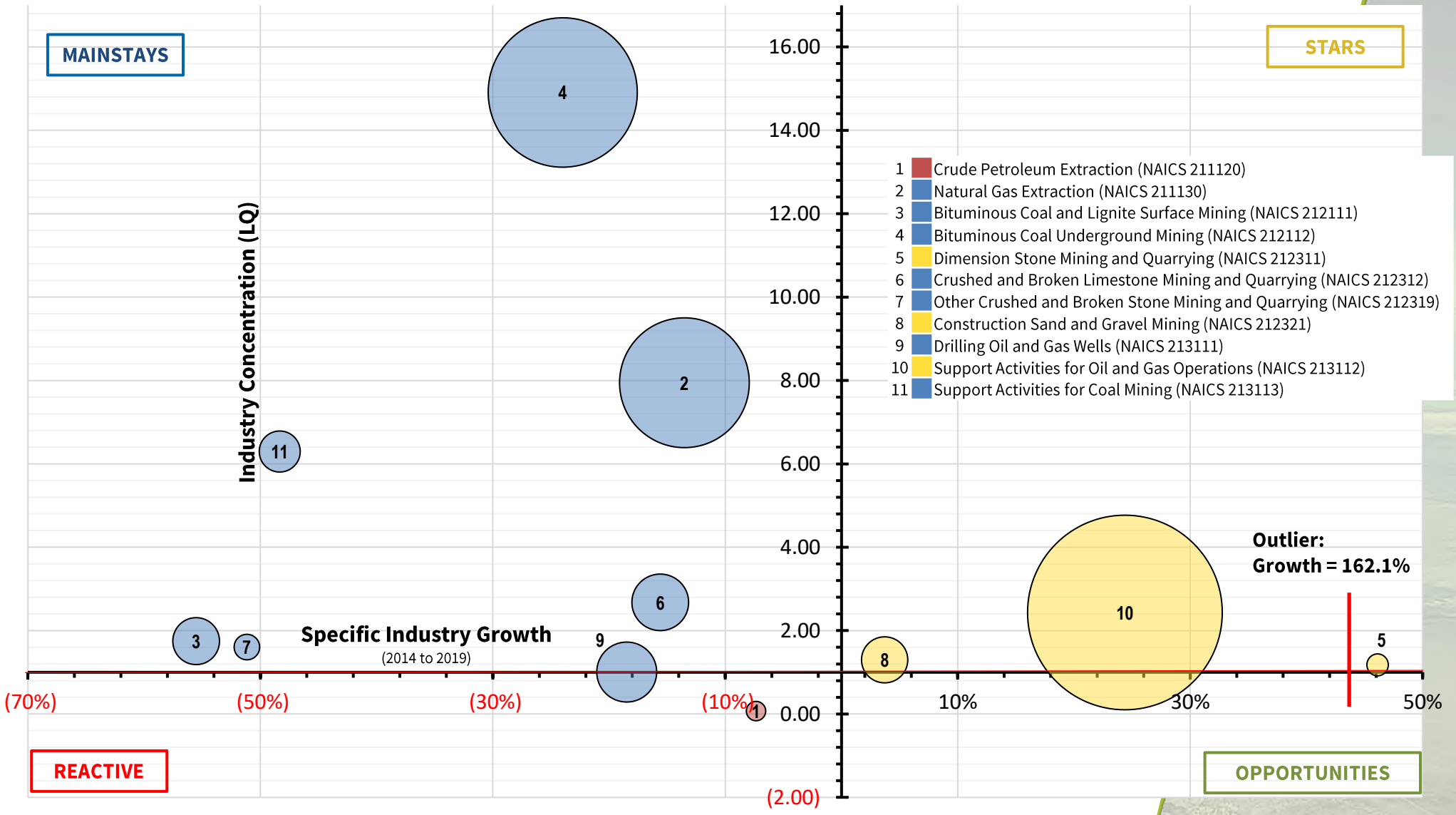
Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

NAICS 21



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 13,954

= 2,000 employees

Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Crude Petroleum Extraction (NAICS 211120)	<10	63	305
Natural Gas Extraction (NAICS 211130)	37	2,572	4,416
Bituminous Coal and Lignite Surface Mining (NAICS 212111)	13	342	649
Bituminous Coal Underground Mining (NAICS 212112)	0	3,395	3,641
Dimension Stone Mining and Quarrying (NAICS 212311)	<10	76	651
Crushed and Broken Limestone Mining and Quarrying (NAICS 212312)	250	498	2,531
Other Crushed and Broken Stone Mining and Quarrying (NAICS 212319)	0	105	861
Construction Sand and Gravel Mining (NAICS 212321)	0	335	671
Drilling Oil and Gas Wells (NAICS 213111)	<10	556	2,014
Support Activities for Oil and Gas Operations (NAICS 213112)	1,113	5,749	11,616
Support Activities for Coal Mining (NAICS 213113)	<10	263	507

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Crude Petroleum Extraction (NAICS 211120)	0.02	0.07	0.07
Natural Gas Extraction (NAICS 211130)	3.59	7.95	2.88
Bituminous Coal and Lignite Surface Mining (NAICS 212111)	2.14	1.75	0.70
Bituminous Coal Underground Mining (NAICS 212112)	0.00	14.91	3.37
Dimension Stone Mining and Quarrying (NAICS 212311)	0.30	1.20	2.16
Crushed and Broken Limestone Mining and Quarrying (NAICS 212312)	42.43	2.68	2.87
Other Crushed and Broken Stone Mining and Quarrying (NAICS 212319)	0.00	1.61	2.77
Construction Sand and Gravel Mining (NAICS 212321)	0.00	1.30	0.55
Drilling Oil and Gas Wells (NAICS 213111)	0.31	1.01	0.77
Support Activities for Oil and Gas Operations (NAICS 213112)	14.90	2.44	1.04
Support Activities for Coal Mining (NAICS 213113)	3.13	6.30	2.56

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Crude Petroleum Extraction (NAICS 211120)	Insf. Data	$78,082	$80,159	$185,773
Natural Gas Extraction (NAICS 211130)	$61,434	$151,467	$128,431	$140,159
Bituminous Coal and Lignite Surface Mining (NAICS 212111)	$69,131	$67,929	$63,095	$88,413
Bituminous Coal Underground Mining (NAICS 212112)	$0	$103,359	$103,855	$92,957
Dimension Stone Mining and Quarrying (NAICS 212311)	Insf. Data	$52,554	$46,407	$48,725
Crushed and Broken Limestone Mining and Quarrying (NAICS 212312)	$60,966	$62,376	$58,770	$64,060
Other Crushed and Broken Stone Mining and Quarrying (NAICS 212319)	$0	$62,968	$59,203	$69,348
Construction Sand and Gravel Mining (NAICS 212321)	$0	$49,764	$49,922	$64,375
Drilling Oil and Gas Wells (NAICS 213111)	Insf. Data	$98,077	$87,673	$99,974
Support Activities for Oil and Gas Operations (NAICS 213112)	$86,507	$87,087	$85,389	$90,354
Support Activities for Coal Mining (NAICS 213113)	Insf. Data	$67,408	$62,886	$75,819

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Mining, Quarrying, & Oil and Gas Extraction

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Crude Petroleum Extraction (NAICS 211120)	Insf. Data	Insf. Data	(7%)	(37%)	(33%)	(23%)	(28%)	(7%)
Natural Gas Extraction (NAICS 211130)	(84%)	(65%)	(14%)	13%	(27%)	6%	(24%)	1%
Bituminous Coal and Lignite Surface Mining (NAICS 212111)	(82%)	Insf. Data	(56%)	(33%)	(55%)	(36%)	(27%)	(6%)
Bituminous Coal Underground Mining (NAICS 212112)	0%	0%	(24%)	(11%)	(29%)	(13%)	(31%)	(7%)
Dimension Stone Mining and Quarrying (NAICS 212311)	Insf. Data	Insf. Data	162%	33%	(24%)	(7%)	1%	6%
Crushed and Broken Limestone Mining and Quarrying (NAICS 212312)	16%	8%	(16%)	(9%)	(2%)	(4%)	8%	2%
Other Crushed and Broken Stone Mining and Quarrying (NAICS 212319)	0%	0%	(51%)	(28%)	15%	3%	8%	7%
Construction Sand and Gravel Mining (NAICS 212321)	0%	0%	4%	0%	(10%)	(3%)	13%	6%
Drilling Oil and Gas Wells (NAICS 213111)	Insf. Data	Insf. Data	(18%)	11%	(44%)	10%	(34%)	4%
Support Activities for Oil and Gas Operations (NAICS 213112)	118%	47%	24%	36%	(16%)	23%	(16%)	15%
Support Activities for Coal Mining (NAICS 213113)	Insf. Data	Insf. Data	(48%)	5%	(48%)	(3%)	(43%)	0%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.
Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Manufacturing

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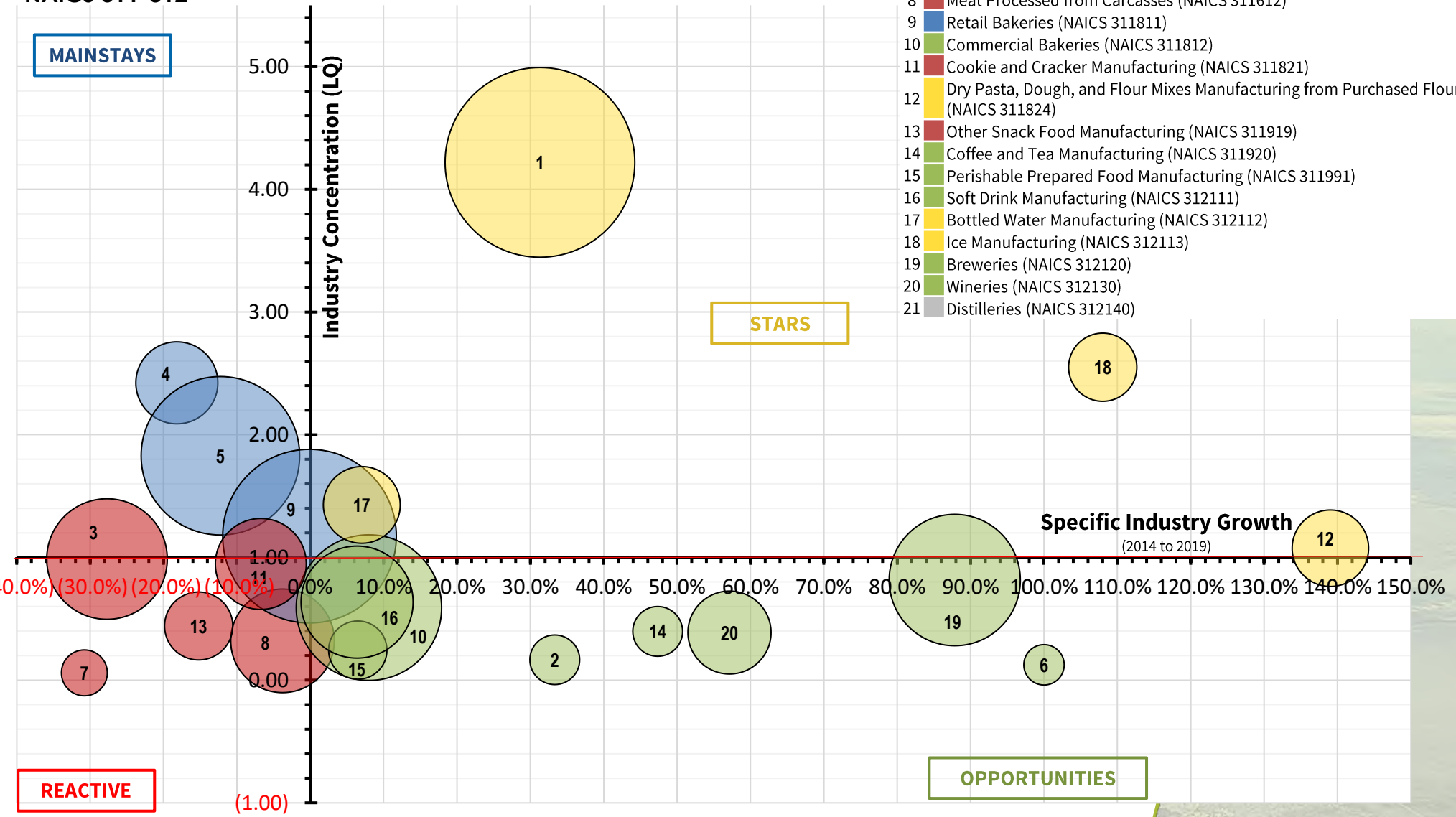
Target Industry Analysis – Food & Beverage Processing

NAICS 311-312



1 Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)
2 Frozen Specialty Food Manufacturing (NAICS 311412)
3 Fruit and Vegetable Canning (NAICS 311421)
4 Specialty Canning (NAICS 311422)
5 Fluid Milk Manufacturing (NAICS 311511)
6 Cheese Manufacturing (NAICS 311513)
7 Animal (except Poultry) Slaughtering (NAICS 311611)
8 Meat Processed from Carcasses (NAICS 311612)
9 Retail Bakeries (NAICS 311811)
10 Commercial Bakeries (NAICS 311812)
11 Cookie and Cracker Manufacturing (NAICS 311821)
12 Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)
13 Other Snack Food Manufacturing (NAICS 311919)
14 Coffee and Tea Manufacturing (NAICS 311920)
15 Perishable Prepared Food Manufacturing (NAICS 311991)
16 Soft Drink Manufacturing (NAICS 312111)
17 Bottled Water Manufacturing (NAICS 312112)
18 Ice Manufacturing (NAICS 312113)
19 Breweries (NAICS 312120)
20 Wineries (NAICS 312130)
21 Distilleries (NAICS 312140)

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 7,501

= 250 employees

Target Industry Analysis – Food & Beverage Processing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)	23	1,187	5,576
Frozen Specialty Food Manufacturing (NAICS 311412)	0	84	1,332
Fruit and Vegetable Canning (NAICS 311421)	0	483	4,218
Specialty Canning (NAICS 311422)	0	225	962
Fluid Milk Manufacturing (NAICS 311511)	139	832	3,325
Cheese Manufacturing (NAICS 311513)	0	56	1,574
Animal (except Poultry) Slaughtering (NAICS 311611)	<10	72	5,767
Meat Processed from Carcasses (NAICS 311612)	0	357	6,883
Retail Bakeries (NAICS 311811)	<10	996	3,580
Commercial Bakeries (NAICS 311812)	<10	702	7,134
Cookie and Cracker Manufacturing (NAICS 311821)	0	277	1,723
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)	0	196	877
Other Snack Food Manufacturing (NAICS 311919)	0	156	5,723
Coffee and Tea Manufacturing (NAICS 311920)	0	84	930
Perishable Prepared Food Manufacturing (NAICS 311991)	<10	115	2,968
Soft Drink Manufacturing (NAICS 312111)	0	417	2,299
Bottled Water Manufacturing (NAICS 312112)	0	198	1,912
Ice Manufacturing (NAICS 312113)	0	156	364
Breweries (NAICS 312120)	0	571	3,510
Wineries (NAICS 312130)	25	231	2,010
Distilleries (NAICS 312140)	<10	105	569

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Food & Beverage Processing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)	2.63	4.22	4.18
Frozen Specialty Food Manufacturing (NAICS 311412)	0.00	0.17	0.56
Fruit and Vegetable Canning (NAICS 311421)	0.00	0.99	1.82
Specialty Canning (NAICS 311422)	0.00	2.42	2.18
Fluid Milk Manufacturing (NAICS 311511)	9.64	1.83	1.54
Cheese Manufacturing (NAICS 311513)	0.00	0.13	0.75
Animal (except Poultry) Slaughtering (NAICS 311611)	0.02	0.06	1.01
Meat Processed from Carcasses (NAICS 311612)	0.00	0.32	1.30
Retail Bakeries (NAICS 311811)	0.07	1.17	0.89
Commercial Bakeries (NAICS 311812)	0.02	0.59	1.27
Cookie and Cracker Manufacturing (NAICS 311821)	0.00	0.95	1.24
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)	0.00	1.07	1.01
Other Snack Food Manufacturing (NAICS 311919)	0.00	0.44	3.41
Coffee and Tea Manufacturing (NAICS 311920)	0.00	0.40	0.92
Perishable Prepared Food Manufacturing (NAICS 311991)	0.07	0.25	1.34
Soft Drink Manufacturing (NAICS 312111)	0.00	0.64	0.74
Bottled Water Manufacturing (NAICS 312112)	0.00	1.43	2.91
Ice Manufacturing (NAICS 312113)	0.00	2.55	1.25
Breweries (NAICS 312120)	0.00	0.82	1.06
Wineries (NAICS 312130)	1.33	0.39	0.71
Distilleries (NAICS 312140)	0.25	0.73	0.83

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Food & Beverage Processing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)	$29,236	$33,834	$48,766	$43,160
Frozen Specialty Food Manufacturing (NAICS 311412)	Insf. Data	$54,828	$45,583	$47,905
Fruit and Vegetable Canning (NAICS 311421)	Insf. Data	$40,009	$50,176	$54,292
Specialty Canning (NAICS 311422)	Insf. Data	$79,180	$62,790	$60,056
Fluid Milk Manufacturing (NAICS 311511)	$48,058	$44,328	$55,483	$63,778
Cheese Manufacturing (NAICS 311513)	Insf. Data	$58,180	$64,737	$55,749
Animal (except Poultry) Slaughtering (NAICS 311611)	Insf. Data	$39,431	$52,059	$46,685
Meat Processed from Carcasses (NAICS 311612)	Insf. Data	$50,641	$46,950	$47,732
Retail Bakeries (NAICS 311811)	Insf. Data	$20,654	$19,048	$24,062
Commercial Bakeries (NAICS 311812)	Insf. Data	$34,862	$48,497	$45,084
Cookie and Cracker Manufacturing (NAICS 311821)	Insf. Data	$42,885	$47,255	$50,776
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)	Insf. Data	$64,489	$58,487	$51,454
Other Snack Food Manufacturing (NAICS 311919)	Insf. Data	$48,807	$50,473	$52,312
Coffee and Tea Manufacturing (NAICS 311920)	Insf. Data	$45,039	$78,294	$53,659
Perishable Prepared Food Manufacturing (NAICS 311991)	Insf. Data	$36,993	$40,070	$39,120
Soft Drink Manufacturing (NAICS 312111)	Insf. Data	$50,125	$63,987	$58,231
Bottled Water Manufacturing (NAICS 312112)	Insf. Data	$64,824	$58,941	$56,865
Ice Manufacturing (NAICS 312113)	Insf. Data	$32,187	$32,648	$39,256
Breweries (NAICS 312120)	Insf. Data	$33,450	$41,607	$44,685
Wineries (NAICS 312130)	$14,499	$17,759	$17,510	$46,246
Distilleries (NAICS 312140)	Insf. Data	$21,433	$30,439	$64,482

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Food & Beverage Processing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)	77%	9%	31%	10%	12%	1%	8%	1%
Frozen Specialty Food Manufacturing (NAICS 311412)	0%	0%	33%	27%	12%	6%	4%	1%
Fruit and Vegetable Canning (NAICS 311421)	Insf. Data	0%	(28%)	(24%)	(2%)	(7%)	(4%)	(5%)
Specialty Canning (NAICS 311422)	0%	0%	(18%)	(54%)	(28%)	(22%)	6%	3%
Fluid Milk Manufacturing (NAICS 311511)	9%	4%	(12%)	(9%)	1%	(4%)	3%	(1%)
Cheese Manufacturing (NAICS 311513)	0%	0%	100%	21%	(3%)	3%	23%	9%
Animal (except Poultry) Slaughtering (NAICS 311611)	Insf. Data	Insf. Data	(31%)	(4%)	11%	3%	6%	4%
Meat Processed from Carcasses (NAICS 311612)	0%	0%	(4%)	(4%)	22%	10%	14%	8%
Retail Bakeries (NAICS 311811)	Insf. Data	Insf. Data	(0%)	4%	11%	5%	14%	7%
Commercial Bakeries (NAICS 311812)	Insf. Data	Insf. Data	8%	(5%)	(11%)	(12%)	7%	1%
Cookie and Cracker Manufacturing (NAICS 311821)	0%	0%	(7%)	11%	(6%)	3%	6%	4%
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)	0%	0%	139%	17%	(3%)	6%	(1%)	1%
Other Snack Food Manufacturing (NAICS 311919)	0%	0%	(15%)	(22%)	(2%)	(8%)	11%	3%
Coffee and Tea Manufacturing (NAICS 311920)	0%	0%	47%	6%	61%	22%	31%	14%
Perishable Prepared Food Manufacturing (NAICS 311991)	Insf. Data	Insf. Data	6%	(10%)	39%	12%	38%	12%
Soft Drink Manufacturing (NAICS 312111)	0%	0%	6%	4%	(19%)	(8%)	8%	(4%)
Bottled Water Manufacturing (NAICS 312112)	0%	0%	7%	7%	42%	9%	22%	7%
Ice Manufacturing (NAICS 312113)	0%	0%	108%	26%	10%	15%	2%	6%
Breweries (NAICS 312120)	0%	0%	88%	12%	97%	20%	105%	22%
Wineries (NAICS 312130)	(38%)	(28%)	57%	16%	100%	19%	31%	9%
Distilleries (NAICS 312140)	Insf. Data	Insf. Data	Insf. Data	45%	256%	29%	60%	19%

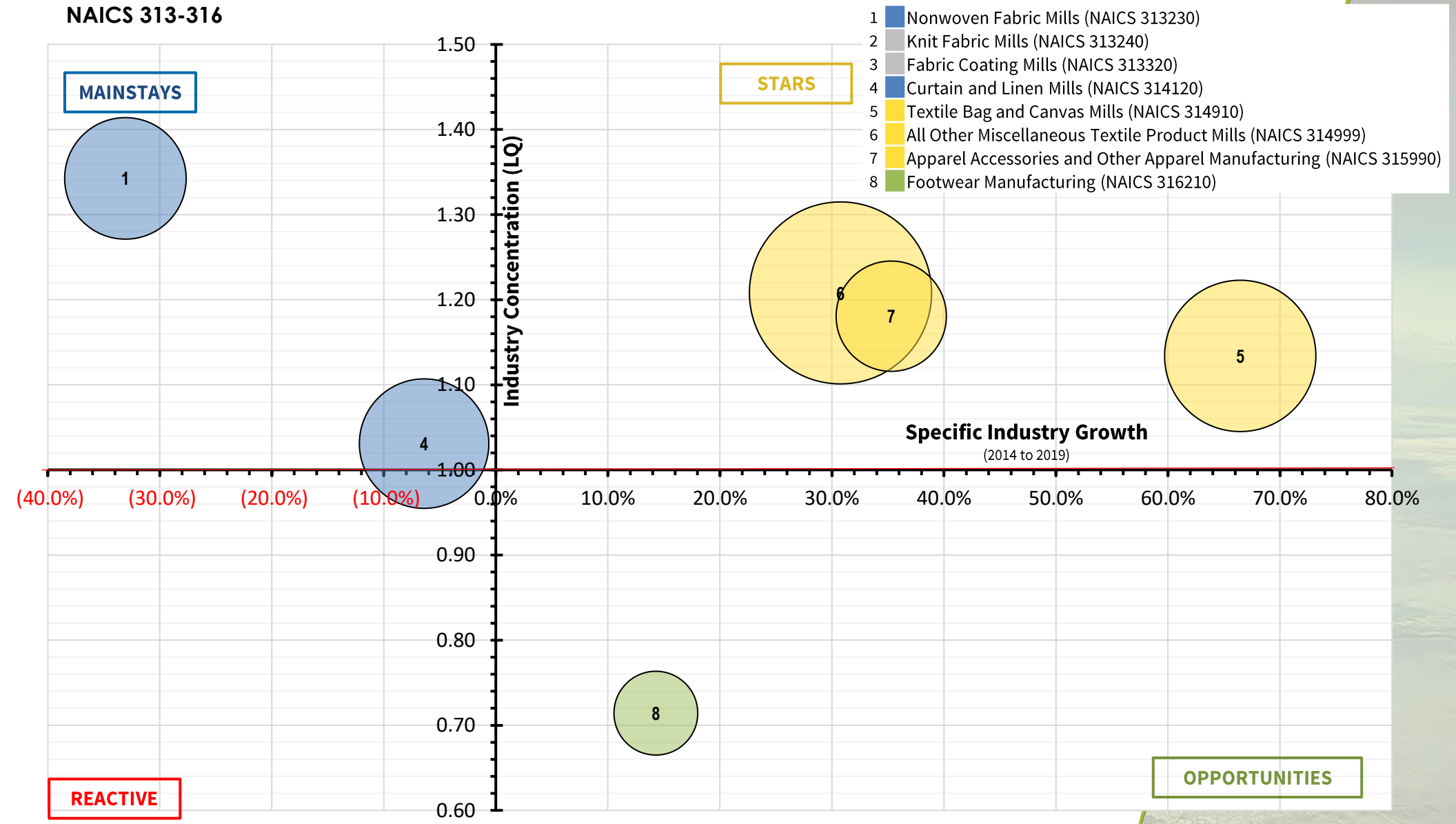
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Textile Manufacturing

NAICS 313-316



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 4,603

= 5,000 employees

Target Industry Analysis – Textile Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Nonwoven Fabric Mills (NAICS 313230)	146	168	639
Knit Fabric Mills (NAICS 313240)	0	88	536
Fabric Coating Mills (NAICS 313320)	<10	69	351
Curtain and Linen Mills (NAICS 314120)	0	190	706
Textile Bag and Canvas Mills (NAICS 314910)	<10	258	911
All Other Miscellaneous Textile Product Mills (NAICS 314999)	0	374	1,701
Apparel Accessories and Other Apparel Manufacturing (NAICS 315990)	<10	138	732
Footwear Manufacturing (NAICS 316210)	0	80	383

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Textile Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Nonwoven Fabric Mills (NAICS 313230)	36.87	1.34	1.08
Knit Fabric Mills (NAICS 313240)	0.00	1.77	2.26
Fabric Coating Mills (NAICS 313320)	0.48	1.03	1.11
Curtain and Linen Mills (NAICS 314120)	0.00	1.03	0.81
Textile Bag and Canvas Mills (NAICS 314910)	0.25	1.13	0.84
All Other Miscellaneous Textile Product Mills (NAICS 314999)	0.00	1.21	1.16
Apparel Accessories and Other Apparel Manufacturing (NAICS 315990)	0.40	1.18	1.32
Footwear Manufacturing (NAICS 316210)	0.00	0.71	0.72

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Textile Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Nonwoven Fabric Mills (NAICS 313230)	$42,258	$44,129	$57,125	$58,668
Knit Fabric Mills (NAICS 313240)	Insf. Data	$43,046	$46,616	$43,269
Fabric Coating Mills (NAICS 313320)	Insf. Data	$51,237	$63,307	$63,312
Curtain and Linen Mills (NAICS 314120)	Insf. Data	$45,246	$35,857	$36,241
Textile Bag and Canvas Mills (NAICS 314910)	Insf. Data	$49,830	$41,527	$40,653
All Other Miscellaneous Textile Product Mills (NAICS 314999)	Insf. Data	$35,103	$34,951	$35,609
Apparel Accessories and Other Apparel Manufacturing (NAICS 315990)	Insf. Data	$41,601	$39,471	$38,462
Footwear Manufacturing (NAICS 316210)	Insf. Data	$43,254	$37,618	$43,981

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Textile Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Nonwoven Fabric Mills (NAICS 313230)	(10%)	(23%)	(33%)	(26%)	102%	12%	15%	2%
Knit Fabric Mills (NAICS 313240)	0%	0%	Insf. Data	19%	111%	26%	(17%)	(11%)
Fabric Coating Mills (NAICS 313320)	Insf. Data	Insf. Data	Insf. Data	45%	21%	7%	2%	1%
Curtain and Linen Mills (NAICS 314120)	Insf. Data	0%	(6%)	13%	(25%)	(11%)	(1%)	(8%)
Textile Bag and Canvas Mills (NAICS 314910)	Insf. Data	Insf. Data	66%	15%	7%	2%	6%	1%
All Other Miscellaneous Textile Product Mills (NAICS 314999)	0%	0%	31%	(1%)	(4%)	(13%)	3%	(0%)
Apparel Accessories and Other Apparel Manufacturing (NAICS 315990)	Insf. Data	Insf. Data	35%	16%	31%	2%	3%	(1%)
Footwear Manufacturing (NAICS 316210)	0%	0%	14%	21%	(26%)	(9%)	(3%)	(2%)

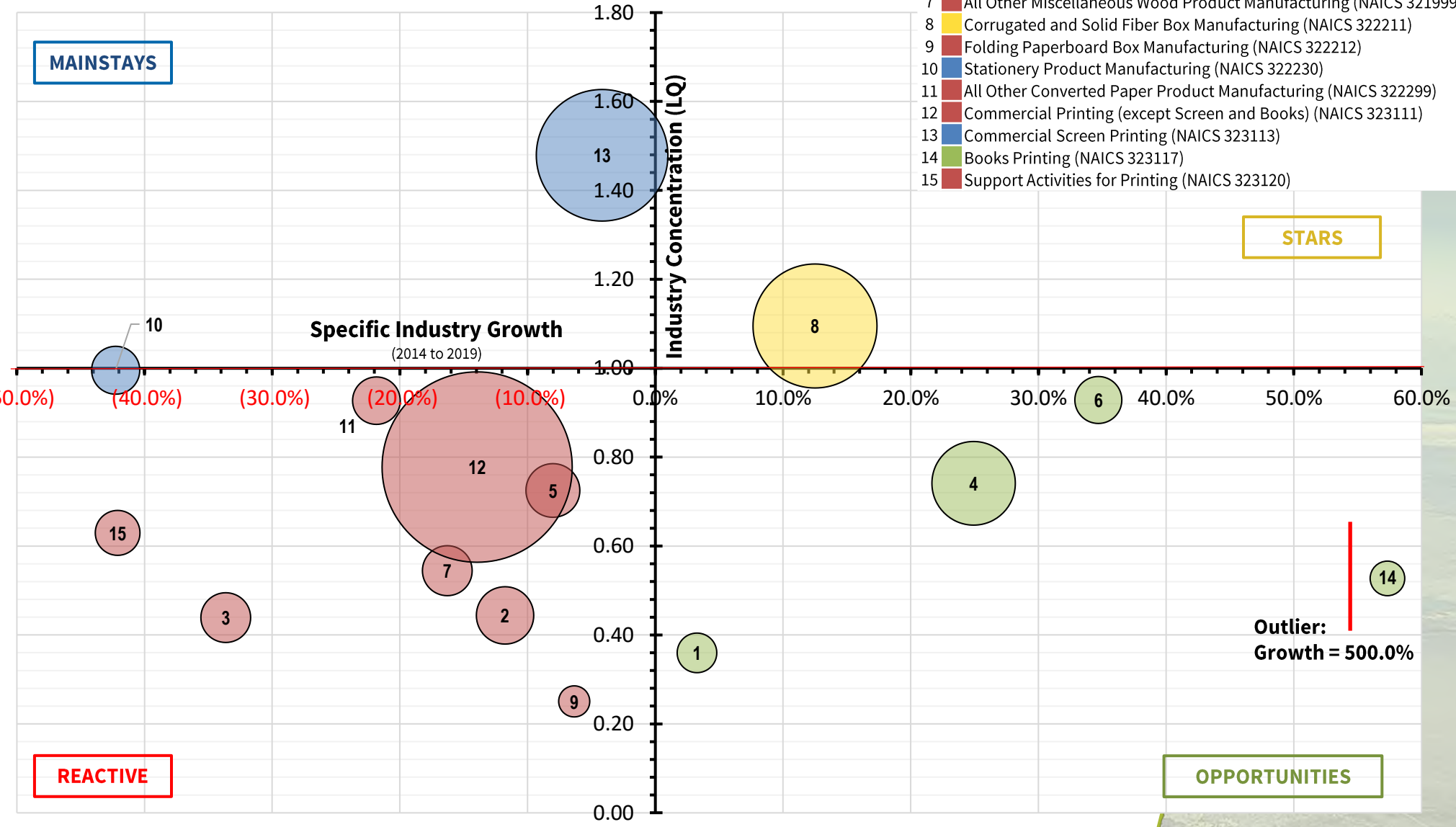
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Wood Product Manufacturing

NAICS 321-323



1. Truss Manufacturing (NAICS 321214)
2. Wood Window and Door Manufacturing (NAICS 321911)
3. Other Millwork (including Flooring) (NAICS 321918)
4. Wood Container and Pallet Manufacturing (NAICS 321920)
5. Manufactured Home (Mobile Home) Manufacturing (NAICS 321991)
6. Prefabricated Wood Building Manufacturing (NAICS 321992)
7. All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)
8. Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)
9. Folding Paperboard Box Manufacturing (NAICS 322212)
10. Stationery Product Manufacturing (NAICS 322230)
11. All Other Converted Paper Product Manufacturing (NAICS 322299)
12. Commercial Printing (except Screen and Books) (NAICS 323111)
13. Commercial Screen Printing (NAICS 323113)
14. Books Printing (NAICS 323117)
15. Support Activities for Printing (NAICS 323120)

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 5,851

= 350 employees

Target Industry Analysis – Wood Product Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Truss Manufacturing (NAICS 321214)	0	95	962
Wood Window and Door Manufacturing (NAICS 321911)	0	195	1,783
Other Millwork (including Flooring) (NAICS 321918)	<10	148	1,681
Wood Container and Pallet Manufacturing (NAICS 321920)	49	411	3,930
Manufactured Home (Mobile Home) Manufacturing (NAICS 321991)	0	172	1,685
Prefabricated Wood Building Manufacturing (NAICS 321992)	0	132	3,377
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	36	149	3,541
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	81	900	5,853
Folding Paperboard Box Manufacturing (NAICS 322212)	0	59	728
Stationery Product Manufacturing (NAICS 322230)	119	138	2,276
All Other Converted Paper Product Manufacturing (NAICS 322299)	0	136	1,549
Commercial Printing (except Screen and Books) (NAICS 323111)	16	2,104	17,400
Commercial Screen Printing (NAICS 323113)	234	1,013	3,602
Books Printing (NAICS 323117)	0	78	1,593
Support Activities for Printing (NAICS 323120)	0	121	764

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Wood Product Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Truss Manufacturing (NAICS 321214)	0.00	0.36	0.77
Wood Window and Door Manufacturing (NAICS 321911)	0.00	0.44	0.86
Other Millwork (including Flooring) (NAICS 321918)	0.12	0.44	1.05
Wood Container and Pallet Manufacturing (NAICS 321920)	2.77	0.74	1.50
Manufactured Home (Mobile Home) Manufacturing (NAICS 321991)	0.00	0.72	1.50
Prefabricated Wood Building Manufacturing (NAICS 321992)	0.00	0.93	5.02
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	4.13	0.54	2.73
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	3.11	1.09	1.50
Folding Paperboard Box Manufacturing (NAICS 322212)	0.00	0.25	0.65
Stationery Product Manufacturing (NAICS 322230)	27.21	1.00	3.47
All Other Converted Paper Product Manufacturing (NAICS 322299)	0.00	0.93	2.23
Commercial Printing (except Screen and Books) (NAICS 323111)	0.19	0.78	1.36
Commercial Screen Printing (NAICS 323113)	10.81	1.48	1.11
Books Printing (NAICS 323117)	0.00	0.52	2.28
Support Activities for Printing (NAICS 323120)	0.00	0.63	0.84

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Wood Product Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Truss Manufacturing (NAICS 321214)	Insf. Data	$52,532	$45,176	$44,235
Wood Window and Door Manufacturing (NAICS 321911)	Insf. Data	$54,085	$45,660	$50,022
Other Millwork (including Flooring) (NAICS 321918)	Insf. Data	$34,796	$44,770	$42,354
Wood Container and Pallet Manufacturing (NAICS 321920)	$41,156	$37,526	$37,728	$38,610
Manufactured Home (Mobile Home) Manufacturing (NAICS 321991)	Insf. Data	$44,416	$46,215	$44,751
Prefabricated Wood Building Manufacturing (NAICS 321992)	Insf. Data	$48,091	$42,264	$44,455
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	$37,045	$39,042	$42,472	$41,295
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	$50,509	$55,834	$65,916	$65,677
Folding Paperboard Box Manufacturing (NAICS 322212)	Insf. Data	$54,594	$61,175	$59,975
Stationery Product Manufacturing (NAICS 322230)	$41,272	$43,106	$48,305	$53,677
All Other Converted Paper Product Manufacturing (NAICS 322299)	Insf. Data	$76,452	$46,948	$53,377
Commercial Printing (except Screen and Books) (NAICS 323111)	$73,337	$50,461	$53,239	$52,471
Commercial Screen Printing (NAICS 323113)	$35,686	$39,061	$38,495	$38,185
Books Printing (NAICS 323117)	Insf. Data	$73,523	$45,779	$49,204
Support Activities for Printing (NAICS 323120)	Insf. Data	$43,166	$52,410	$52,544

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Wood Product Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Truss Manufacturing (NAICS 321214)	0%	0%	3%	(20%)	10%	(2%)	31%	7%
Wood Window and Door Manufacturing (NAICS 321911)	0%	0%	(12%)	(25%)	(23%)	(14%)	14%	(2%)
Other Millwork (including Flooring) (NAICS 321918)	Insf. Data	Insf. Data	(34%)	(20%)	(11%)	(5%)	2%	(4%)
Wood Container and Pallet Manufacturing (NAICS 321920)	96%	16%	25%	6%	10%	(0%)	8%	1%
Manufactured Home (Mobile Home) Manufacturing (NAICS 321991)	Insf. Data	0%	(8%)	8%	23%	0%	37%	4%
Prefabricated Wood Building Manufacturing (NAICS 321992)	Insf. Data	0%	35%	2%	12%	(2%)	13%	6%
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	(49%)	(8%)	(16%)	1%	13%	3%	15%	6%
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	45%	5%	13%	1%	4%	(3%)	8%	(1%)
Folding Paperboard Box Manufacturing (NAICS 322212)	0%	0%	(6%)	10%	3%	1%	2%	1%
Stationery Product Manufacturing (NAICS 322230)	(49%)	(57%)	(42%)	(49%)	(9%)	(11%)	(17%)	(11%)
All Other Converted Paper Product Manufacturing (NAICS 322299)	0%	0%	(22%)	4%	9%	3%	12%	7%
Commercial Printing (except Screen and Books) (NAICS 323111)	(11%)	Insf. Data	(14%)	(20%)	(8%)	(16%)	(7%)	(13%)
Commercial Screen Printing (NAICS 323113)	84%	18%	(4%)	(5%)	18%	7%	11%	5%
Books Printing (NAICS 323117)	Insf. Data	0%	500%	42%	(25%)	(4%)	(14%)	(7%)
Support Activities for Printing (NAICS 323120)	0%	0%	(42%)	(48%)	(37%)	(40%)	(20%)	(20%)

Source: EMSI 2020 Q1 Dataset

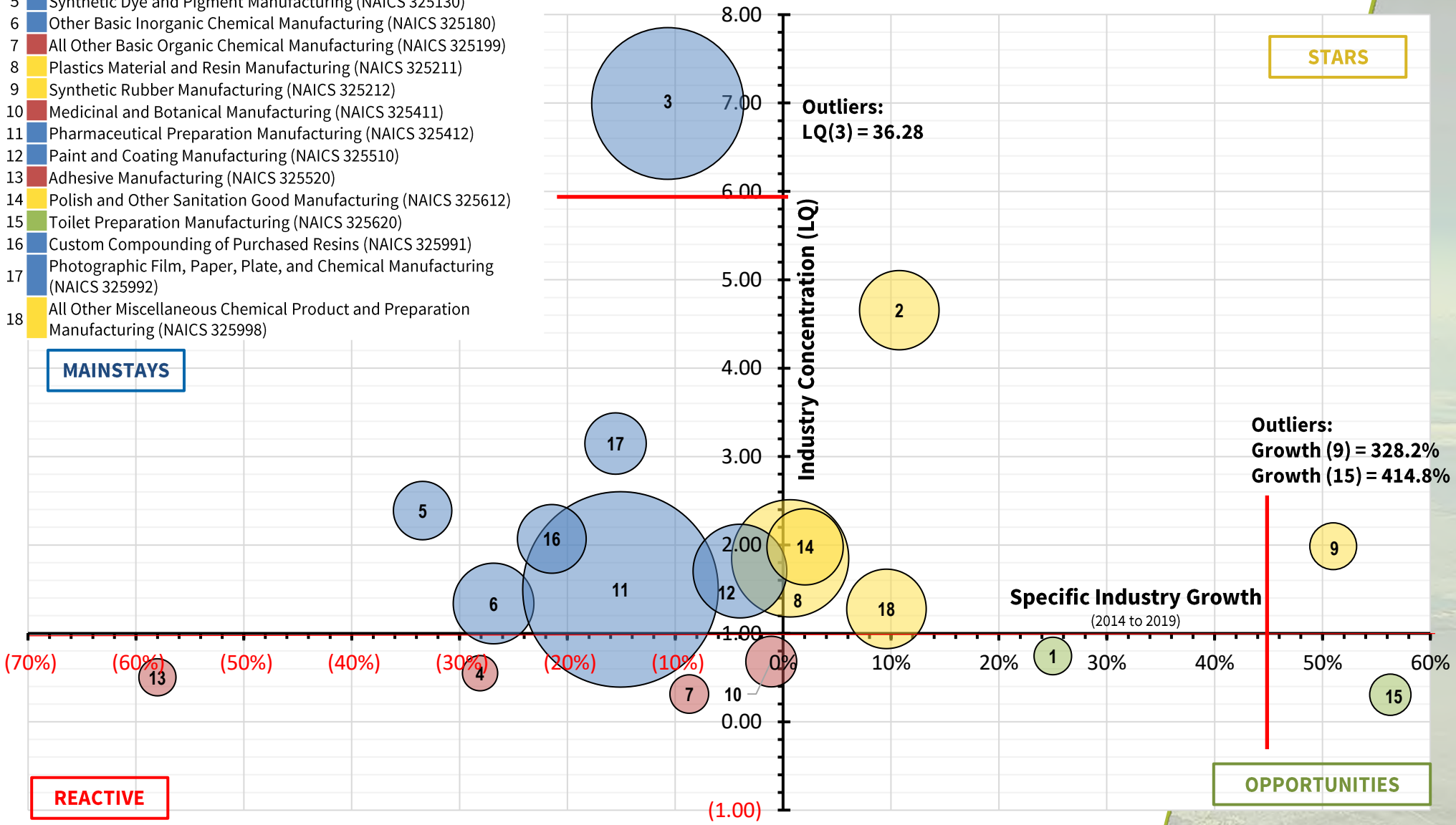
Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Chemical Product Manufacturing

NAICS 324-325

1. Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)
2. Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)
3. All Other Petroleum and Coal Products Manufacturing (NAICS 324199)
4. Industrial Gas Manufacturing (NAICS 325120)
5. Synthetic Dye and Pigment Manufacturing (NAICS 325130)
6. Other Basic Inorganic Chemical Manufacturing (NAICS 325180)
7. All Other Basic Organic Chemical Manufacturing (NAICS 325199)
8. Plastics Material and Resin Manufacturing (NAICS 325211)
9. Synthetic Rubber Manufacturing (NAICS 325212)
10. Medicinal and Botanical Manufacturing (NAICS 325411)
11. Pharmaceutical Preparation Manufacturing (NAICS 325412)
12. Paint and Coating Manufacturing (NAICS 325510)
13. Adhesive Manufacturing (NAICS 325520)
14. Polish and Other Sanitation Good Manufacturing (NAICS 325612)
15. Toilet Preparation Manufacturing (NAICS 325620)
16. Custom Compounding of Purchased Resins (NAICS 325991)
17. Photographic Film, Paper, Plate, and Chemical Manufacturing (NAICS 325992)
18. All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 9,154

= 500 employees

Target Industry Analysis – Chemical Product Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)	0	100	868
Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)	0	432	787
All Other Petroleum and Coal Products Manufacturing (NAICS 324199)	0	1,617	2,056
Industrial Gas Manufacturing (NAICS 325120)	0	87	1,943
Synthetic Dye and Pigment Manufacturing (NAICS 325130)	0	237	1,145
Other Basic Inorganic Chemical Manufacturing (NAICS 325180)	0	447	1,480
All Other Basic Organic Chemical Manufacturing (NAICS 325199)	0	105	1,007
Plastics Material and Resin Manufacturing (NAICS 325211)	0	936	2,740
Synthetic Rubber Manufacturing (NAICS 325212)	0	167	332
Medicinal and Botanical Manufacturing (NAICS 325411)	0	179	695
Pharmaceutical Preparation Manufacturing (NAICS 325412)	0	2,590	13,564
Paint and Coating Manufacturing (NAICS 325510)	0	599	1,578
Adhesive Manufacturing (NAICS 325520)	0	97	791
Polish and Other Sanitation Good Manufacturing (NAICS 325612)	<10	401	1,288
Toilet Preparation Manufacturing (NAICS 325620)	<10	139	4,529
Custom Compounding of Purchased Resins (NAICS 325991)	0	326	977
Photographic Film, Paper, Plate, and Chemical Manufacturing (NAICS 325992)	0	261	540
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	80	435	2,258

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Chemical Product Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)	0.00	0.74	1.37
Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)	0.00	4.66	1.79
All Other Petroleum and Coal Products Manufacturing (NAICS 324199)	0.00	36.28	9.73
Industrial Gas Manufacturing (NAICS 325120)	0.00	0.55	2.57
Synthetic Dye and Pigment Manufacturing (NAICS 325130)	0.00	2.39	2.44
Other Basic Inorganic Chemical Manufacturing (NAICS 325180)	0.00	1.34	0.93
All Other Basic Organic Chemical Manufacturing (NAICS 325199)	0.00	0.31	0.64
Plastics Material and Resin Manufacturing (NAICS 325211)	0.00	1.85	1.14
Synthetic Rubber Manufacturing (NAICS 325212)	0.00	1.97	0.82
Medicinal and Botanical Manufacturing (NAICS 325411)	0.00	0.68	0.56
Pharmaceutical Preparation Manufacturing (NAICS 325412)	0.00	1.50	1.65
Paint and Coating Manufacturing (NAICS 325510)	0.00	1.70	0.95
Adhesive Manufacturing (NAICS 325520)	0.00	0.50	0.87
Polish and Other Sanitation Good Manufacturing (NAICS 325612)	0.11	1.98	1.34
Toilet Preparation Manufacturing (NAICS 325620)	0.06	0.29	2.02
Custom Compounding of Purchased Resins (NAICS 325991)	0.00	2.07	1.31
Photographic Film, Paper, Plate, and Chemical Manufacturing (NAICS 325992)	0.00	3.15	1.37
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	7.42	1.28	1.40

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Chemical Product Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)	Insf. Data	$58,126	$61,405	$73,540
Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)	Insf. Data	$78,949	$79,535	$80,114
All Other Petroleum and Coal Products Manufacturing (NAICS 324199)	Insf. Data	$57,400	$57,122	$74,299
Industrial Gas Manufacturing (NAICS 325120)	Insf. Data	$72,500	$92,921	$115,186
Synthetic Dye and Pigment Manufacturing (NAICS 325130)	Insf. Data	$64,624	$68,472	$83,884
Other Basic Inorganic Chemical Manufacturing (NAICS 325180)	Insf. Data	$81,159	$89,159	$101,347
All Other Basic Organic Chemical Manufacturing (NAICS 325199)	Insf. Data	$79,927	$80,150	$98,115
Plastics Material and Resin Manufacturing (NAICS 325211)	Insf. Data	$79,912	$92,712	$99,886
Synthetic Rubber Manufacturing (NAICS 325212)	Insf. Data	$124,588	$109,856	$92,746
Medicinal and Botanical Manufacturing (NAICS 325411)	Insf. Data	$48,486	$70,936	$108,351
Pharmaceutical Preparation Manufacturing (NAICS 325412)	Insf. Data	$82,414	$148,354	$124,515
Paint and Coating Manufacturing (NAICS 325510)	Insf. Data	$70,926	$73,827	$72,935
Adhesive Manufacturing (NAICS 325520)	Insf. Data	$68,559	$68,300	$78,316
Polish and Other Sanitation Good Manufacturing (NAICS 325612)	Insf. Data	$47,778	$61,014	$79,404
Toilet Preparation Manufacturing (NAICS 325620)	Insf. Data	$48,192	$40,260	$60,752
Custom Compounding of Purchased Resins (NAICS 325991)	Insf. Data	$56,759	$57,087	$61,562
Photographic Film, Paper, Plate, and Chemical Manufacturing (NAICS 325992)	Insf. Data	$51,460	$70,113	$67,015
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	$60,837	$69,263	$77,232	$76,380

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Chemical Product Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)	0%	0%	25%	(14%)	17%	(1%)	19%	9%
Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)	0%	0%	11%	(0%)	9%	3%	1%	6%
All Other Petroleum and Coal Products Manufacturing (NAICS 324199)	0%	0%	(11%)	(2%)	(3%)	1%	(11%)	5%
Industrial Gas Manufacturing (NAICS 325120)	0%	0%	(28%)	(26%)	28%	(4%)	5%	(0%)
Synthetic Dye and Pigment Manufacturing (NAICS 325130)	0%	0%	(33%)	(22%)	(23%)	(17%)	(13%)	(10%)
Other Basic Inorganic Chemical Manufacturing (NAICS 325180)	0%	0%	(27%)	(14%)	2%	(4%)	3%	(2%)
All Other Basic Organic Chemical Manufacturing (NAICS 325199)	0%	0%	(9%)	5%	29%	5%	10%	3%
Plastics Material and Resin Manufacturing (NAICS 325211)	0%	0%	1%	(27%)	1%	(12%)	6%	(1%)
Synthetic Rubber Manufacturing (NAICS 325212)	0%	0%	328%	34%	38%	35%	(5%)	1%
Medicinal and Botanical Manufacturing (NAICS 325411)	0%	0%	(1%)	23%	33%	24%	36%	15%
Pharmaceutical Preparation Manufacturing (NAICS 325412)	0%	0%	(15%)	(17%)	5%	(9%)	(0%)	(0%)
Paint and Coating Manufacturing (NAICS 325510)	(100%)	0%	(4%)	(18%)	13%	(0%)	6%	2%
Adhesive Manufacturing (NAICS 325520)	0%	0%	(58%)	(11%)	(34%)	1%	11%	7%
Polish and Other Sanitation Good Manufacturing (NAICS 325612)	Insf. Data	Insf. Data	2%	0%	11%	12%	1%	5%
Toilet Preparation Manufacturing (NAICS 325620)	Insf. Data	Insf. Data	415%	37%	15%	6%	9%	4%
Custom Compounding of Purchased Resins (NAICS 325991)	0%	0%	(21%)	(8%)	(14%)	(6%)	11%	3%
Photographic Film, Paper, Plate, and Chemical Manufacturing (NAICS 325992)	0%	0%	(16%)	(5%)	(39%)	(19%)	(28%)	(19%)
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	40%	28%	10%	(12%)	11%	(3%)	9%	4%

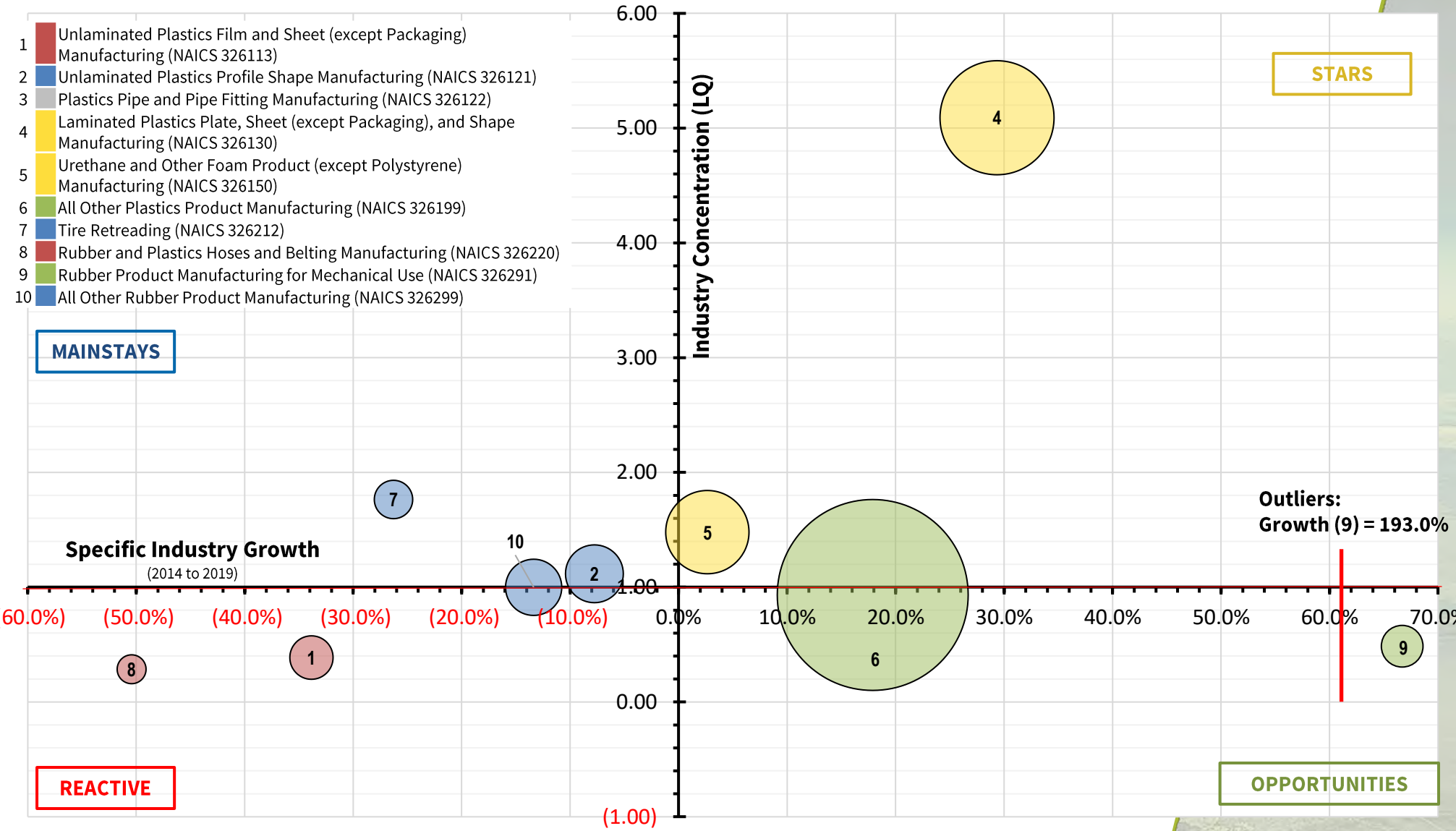
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Plastics Manufacturing

NAICS 326



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 4,644

= 500 employees

Target Industry Analysis – Plastics Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing (NAICS 326113)	0	129	3,054
Unlaminated Plastics Profile Shape Manufacturing (NAICS 326121)	0	226	1,539
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	0	56	876
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130)	25	864	2,109
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	31	464	1,642
All Other Plastics Product Manufacturing (NAICS 326199)	0	2,406	18,078
Tire Retreading (NAICS 326212)	28	101	732
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	0	58	630
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	0	126	1,142
All Other Rubber Product Manufacturing (NAICS 326299)	0	214	1,875

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Plastics Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing (NAICS 326113)	0.00	0.39	1.93
Unlaminated Plastics Profile Shape Manufacturing (NAICS 326121)	0.00	1.12	1.61
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	0.00	0.23	0.77
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130)	4.74	5.09	2.62
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	3.08	1.48	1.10
All Other Plastics Product Manufacturing (NAICS 326199)	0.00	0.93	1.48
Tire Retreading (NAICS 326212)	15.26	1.76	2.69
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	0.00	0.29	0.66
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	0.00	0.47	0.91
All Other Rubber Product Manufacturing (NAICS 326299)	0.00	1.00	1.84

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Plastics Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing (NAICS 326113)	Insf. Data	$91,220	$64,906	$62,260
Unlaminated Plastics Profile Shape Manufacturing (NAICS 326121)	Insf. Data	$48,905	$55,538	$57,398
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	Insf. Data	$82,633	$58,525	$56,544
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130)	$56,430	$57,533	$61,453	$57,879
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	$53,351	$61,095	$53,627	$49,805
All Other Plastics Product Manufacturing (NAICS 326199)	Insf. Data	$50,627	$50,928	$51,881
Tire Retreading (NAICS 326212)	$52,548	$45,263	$44,512	$46,044
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	Insf. Data	$54,608	$51,740	$55,190
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	Insf. Data	$67,046	$75,599	$53,246
All Other Rubber Product Manufacturing (NAICS 326299)	Insf. Data	$99,331	$83,115	$55,632

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Plastics Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing (NAICS 326113)	0%	0%	(34%)	(34%)	9%	(4%)	1%	(1%)
Unlaminated Plastics Profile Shape Manufacturing (NAICS 326121)	0%	0%	(8%)	7%	11%	5%	3%	1%
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	0%	0%	Insf. Data	34%	10%	4%	4%	4%
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130)	(11%)	16%	29%	14%	2%	5%	16%	9%
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	(47%)	(10%)	3%	(3%)	0%	(13%)	14%	5%
All Other Plastics Product Manufacturing (NAICS 326199)	0%	0%	18%	0%	17%	(3%)	9%	(1%)
Tire Retreading (NAICS 326212)	0%	0%	(26%)	4%	7%	6%	(1%)	9%
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	0%	0%	(50%)	3%	(20%)	(4%)	1%	(3%)
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	0%	0%	193%	7%	14%	(3%)	7%	(1%)
All Other Rubber Product Manufacturing (NAICS 326299)	0%	0%	(13%)	(9%)	22%	1%	1%	(2%)

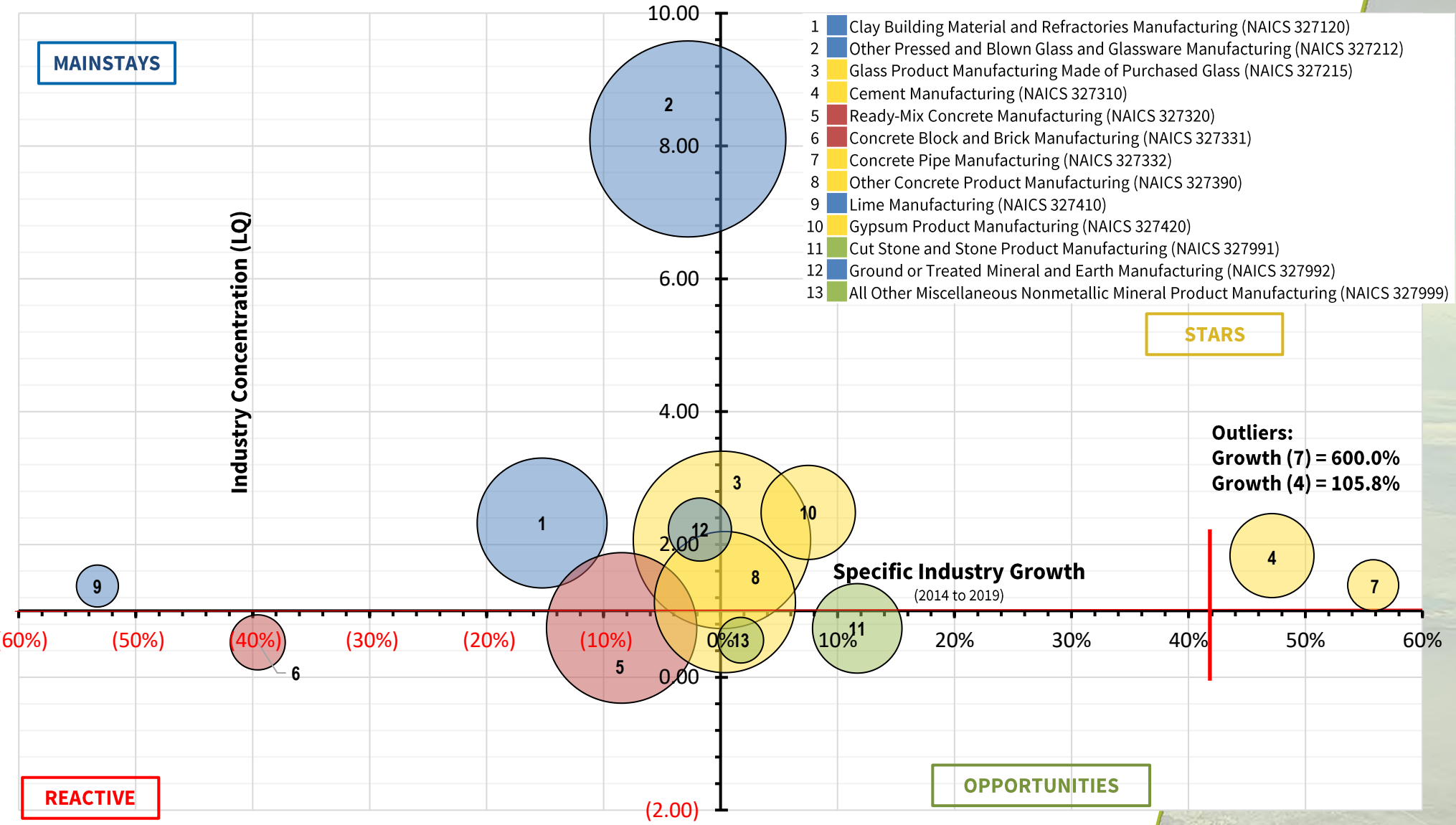
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Stone Product Manufacturing

NAICS 327



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 4,594

= 200 employees

Target Industry Analysis – Stone Product Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Clay Building Material and Refractories Manufacturing (NAICS 327120)	<10	461	1,826
Other Pressed and Blown Glass and Glassware Manufacturing (NAICS 327212)	0	1,043	1,184
Glass Product Manufacturing Made of Purchased Glass (NAICS 327215)	31	858	2,585
Cement Manufacturing (NAICS 327310)	0	214	1,071
Ready-Mix Concrete Manufacturing (NAICS 327320)	202	617	2,983
Concrete Block and Brick Manufacturing (NAICS 327331)	32	84	1,204
Concrete Pipe Manufacturing (NAICS 327332)	0	91	107
Other Concrete Product Manufacturing (NAICS 327390)	<10	543	3,967
Lime Manufacturing (NAICS 327410)	<10	50	209
Gypsum Product Manufacturing (NAICS 327420)	<10	244	410
Cut Stone and Stone Product Manufacturing (NAICS 327991)	<10	220	1,514
Ground or Treated Mineral and Earth Manufacturing (NAICS 327992)	0	111	291
All Other Miscellaneous Nonmetallic Mineral Product Manufacturing (NAICS 327999)	21	59	262

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Stone Product Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Clay Building Material and Refractories Manufacturing (NAICS 327120)	0.39	2.32	1.94
Other Pressed and Blown Glass and Glassware Manufacturing (NAICS 327212)	0.00	8.11	1.94
Glass Product Manufacturing Made of Purchased Glass (NAICS 327215)	2.38	2.07	1.32
Cement Manufacturing (NAICS 327310)	0.00	1.82	1.92
Ready-Mix Concrete Manufacturing (NAICS 327320)	7.68	0.74	0.76
Concrete Block and Brick Manufacturing (NAICS 327331)	6.41	0.53	1.59
Concrete Pipe Manufacturing (NAICS 327332)	0.00	1.38	0.34
Other Concrete Product Manufacturing (NAICS 327390)	0.15	1.13	1.75
Lime Manufacturing (NAICS 327410)	0.66	1.37	1.22
Gypsum Product Manufacturing (NAICS 327420)	0.17	2.48	0.88
Cut Stone and Stone Product Manufacturing (NAICS 327991)	0.15	0.74	1.07
Ground or Treated Mineral and Earth Manufacturing (NAICS 327992)	0.00	2.23	1.24
All Other Miscellaneous Nonmetallic Mineral Product Manufacturing (NAICS 327999)	6.37	0.56	0.53

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Stone Product Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Clay Building Material and Refractories Manufacturing (NAICS 327120)	Insf. Data	$60,326	$67,759	$57,231
Other Pressed and Blown Glass and Glassware Manufacturing (NAICS 327212)	Insf. Data	$55,763	$57,871	$60,471
Glass Product Manufacturing Made of Purchased Glass (NAICS 327215)	$41,405	$41,204	$49,401	$53,183
Cement Manufacturing (NAICS 327310)	Insf. Data	$68,049	$86,599	$82,763
Ready-Mix Concrete Manufacturing (NAICS 327320)	$46,905	$50,918	$56,030	$61,200
Concrete Block and Brick Manufacturing (NAICS 327331)	$27,708	$39,604	$51,076	$57,349
Concrete Pipe Manufacturing (NAICS 327332)	Insf. Data	$58,663	$62,163	$58,065
Other Concrete Product Manufacturing (NAICS 327390)	Insf. Data	$43,160	$53,668	$54,184
Lime Manufacturing (NAICS 327410)	Insf. Data	$58,838	$69,657	$76,619
Gypsum Product Manufacturing (NAICS 327420)	Insf. Data	$77,634	$72,294	$71,216
Cut Stone and Stone Product Manufacturing (NAICS 327991)	Insf. Data	$43,258	$45,772	$46,046
Ground or Treated Mineral and Earth Manufacturing (NAICS 327992)	Insf. Data	$72,145	$114,103	$76,303
All Other Miscellaneous Nonmetallic Mineral Product Manufacturing (NAICS 327999)	$38,427	$46,415	$54,934	$60,418

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Stone Product Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Clay Building Material and Refractories Manufacturing (NAICS 327120)	Insf. Data	Insf. Data	(15%)	(18%)	(0%)	(8%)	(2%)	(4%)
Other Pressed and Blown Glass and Glassware Manufacturing (NAICS 327212)	0%	0%	(3%)	(14%)	(15%)	(19%)	(8%)	(5%)
Glass Product Manufacturing Made of Purchased Glass (NAICS 327215)	Insf. Data	52%	0%	(6%)	4%	(2%)	13%	3%
Cement Manufacturing (NAICS 327310)	0%	0%	106%	14%	9%	(3%)	10%	(2%)
Ready-Mix Concrete Manufacturing (NAICS 327320)	(10%)	(13%)	(8%)	(15%)	3%	(8%)	14%	(1%)
Concrete Block and Brick Manufacturing (NAICS 327331)	113%	47%	(40%)	(4%)	(8%)	(5%)	6%	1%
Concrete Pipe Manufacturing (NAICS 327332)	0%	0%	600%	34%	26%	31%	4%	2%
Other Concrete Product Manufacturing (NAICS 327390)	Insf. Data	Insf. Data	0%	(9%)	11%	(6%)	11%	0%
Lime Manufacturing (NAICS 327410)	Insf. Data	Insf. Data	(53%)	(30%)	(26%)	(14%)	18%	7%
Gypsum Product Manufacturing (NAICS 327420)	Insf. Data	Insf. Data	7%	4%	3%	4%	9%	2%
Cut Stone and Stone Product Manufacturing (NAICS 327991)	Insf. Data	Insf. Data	12%	2%	44%	10%	25%	7%
Ground or Treated Mineral and Earth Manufacturing (NAICS 327992)	0%	0%	(2%)	(5%)	(32%)	(8%)	(15%)	2%
All Other Miscellaneous Nonmetallic Mineral Product Manufacturing (NAICS 327999)	(32%)	(24%)	2%	(24%)	(4%)	(5%)	7%	7%

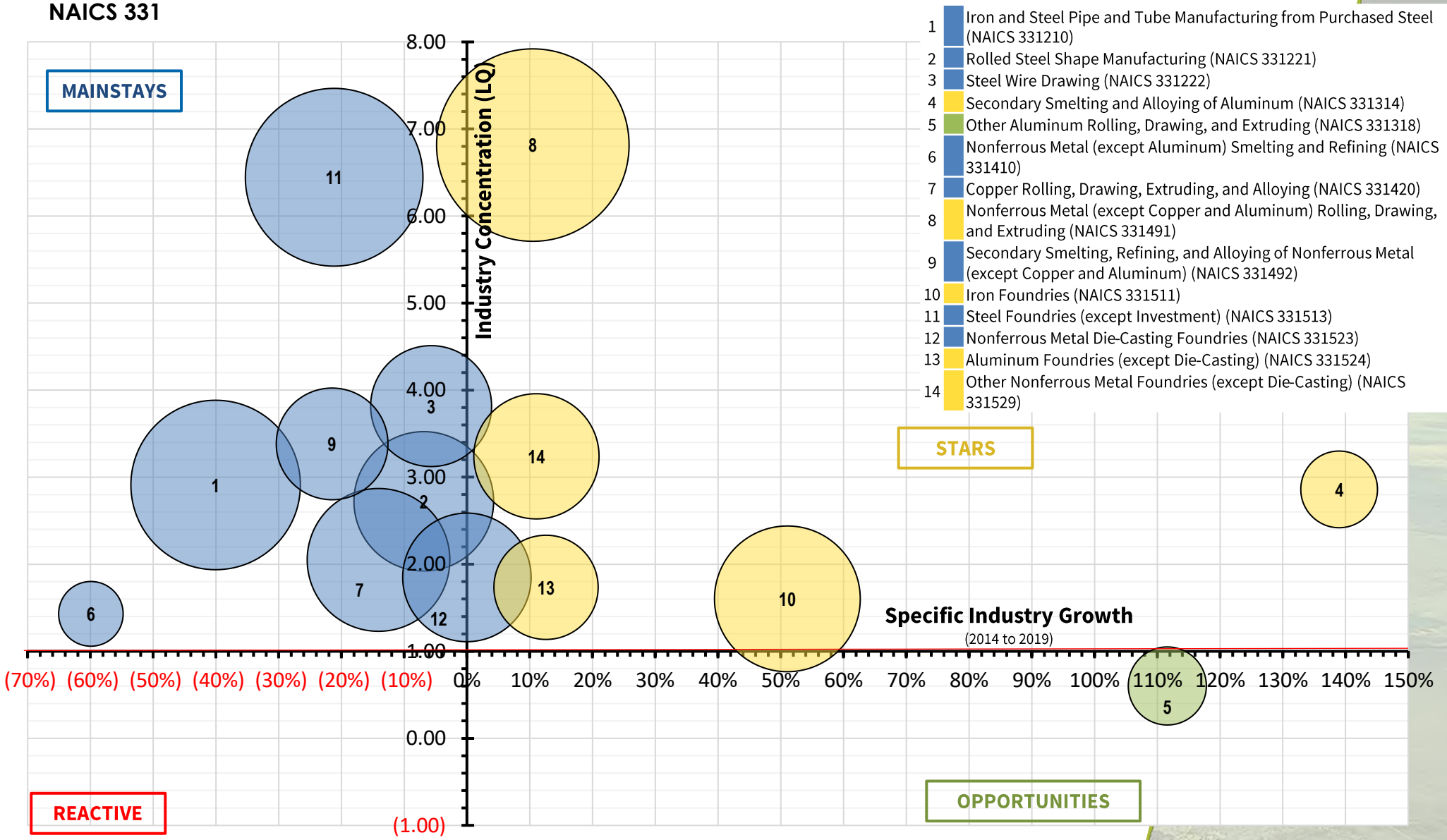
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Primary Metal Manufacturing

NAICS 331



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 5,796

= 200 employees

Target Industry Analysis – Primary Metal Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel (NAICS 331210)	0	677	2,845
Rolled Steel Shape Manufacturing (NAICS 331221)	<10	461	1,638
Steel Wire Drawing (NAICS 331222)	15	347	1,317
Secondary Smelting and Alloying of Aluminum (NAICS 331314)	0	141	163
Other Aluminum Rolling, Drawing, and Extruding (NAICS 331318)	0	146	2,491
Nonferrous Metal (except Aluminum) Smelting and Refining (NAICS 331410)	0	101	843
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	0	482	1,775
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491)	0	874	1,438
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) (NAICS 331492)	0	296	1,640
Iron Foundries (NAICS 331511)	0	503	4,306
Steel Foundries (except Investment) (NAICS 331513)	111	745	1,297
Nonferrous Metal Die-Casting Foundries (NAICS 331523)	0	391	991
Aluminum Foundries (except Die-Casting) (NAICS 331524)	0	259	1,033
Other Nonferrous Metal Foundries (except Die-Casting) (NAICS 331529)	<10	371	937

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Primary Metal Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel (NAICS 331210)	0.00	2.91	2.58
Rolled Steel Shape Manufacturing (NAICS 331221)	0.48	2.72	2.04
Steel Wire Drawing (NAICS 331222)	5.31	3.82	3.06
Secondary Smelting and Alloying of Aluminum (NAICS 331314)	0.00	2.86	0.70
Other Aluminum Rolling, Drawing, and Extruding (NAICS 331318)	0.00	0.60	2.16
Nonferrous Metal (except Aluminum) Smelting and Refining (NAICS 331410)	0.00	1.43	2.53
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	0.00	2.05	1.59
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491)	0.00	6.81	2.36
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) (NAICS 331492)	0.00	3.38	3.95
Iron Foundries (NAICS 331511)	0.00	1.60	2.89
Steel Foundries (except Investment) (NAICS 331513)	30.39	6.44	2.37
Nonferrous Metal Die-Casting Foundries (NAICS 331523)	0.00	1.85	0.99
Aluminum Foundries (except Die-Casting) (NAICS 331524)	0.00	1.73	1.46
Other Nonferrous Metal Foundries (except Die-Casting) (NAICS 331529)	0.36	3.24	1.72

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Primary Metal Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel (NAICS 331210)	Insf. Data	$74,751	$66,116	$70,233
Rolled Steel Shape Manufacturing (NAICS 331221)	Insf. Data	$60,530	$64,762	$72,406
Steel Wire Drawing (NAICS 331222)	$81,192	$54,469	$53,630	$54,703
Secondary Smelting and Alloying of Aluminum (NAICS 331314)	Insf. Data	$67,396	$67,520	$61,781
Other Aluminum Rolling, Drawing, and Extruding (NAICS 331318)	Insf. Data	$47,348	$65,162	$57,833
Nonferrous Metal (except Aluminum) Smelting and Refining (NAICS 331410)	Insf. Data	$67,705	$77,942	$78,725
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	Insf. Data	$73,491	$70,458	$66,220
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491)	Insf. Data	$80,193	$78,724	$71,317
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) (NAICS 331492)	Insf. Data	$75,303	$69,174	$68,496
Iron Foundries (NAICS 331511)	Insf. Data	$68,606	$67,857	$63,758
Steel Foundries (except Investment) (NAICS 331513)	$57,172	$63,084	$63,732	$64,753
Nonferrous Metal Die-Casting Foundries (NAICS 331523)	Insf. Data	$47,481	$50,856	$54,162
Aluminum Foundries (except Die-Casting) (NAICS 331524)	Insf. Data	$48,270	$46,108	$54,479
Other Nonferrous Metal Foundries (except Die-Casting) (NAICS 331529)	Insf. Data	$54,519	$56,788	$63,335

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Primary Metal Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel (NAICS 331210)	0%	0%	(40%)	(16%)	(18%)	(9%)	0%	3%
Rolled Steel Shape Manufacturing (NAICS 331221)	Insf. Data	Insf. Data	(7%)	(7%)	(0%)	(6%)	(5%)	(1%)
Steel Wire Drawing (NAICS 331222)	(21%)	Insf. Data	(6%)	1%	(11%)	(9%)	(4%)	5%
Secondary Smelting and Alloying of Aluminum (NAICS 331314)	0%	0%	139%	8%	94%	4%	9%	7%
Other Aluminum Rolling, Drawing, and Extruding (NAICS 331318)	0%	0%	112%	(9%)	16%	(1%)	7%	(1%)
Nonferrous Metal (except Aluminum) Smelting and Refining (NAICS 331410)	0%	0%	(60%)	(58%)	(17%)	(6%)	(13%)	(5%)
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	0%	0%	(14%)	(8%)	(7%)	(13%)	(3%)	(4%)
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491)	0%	0%	10%	4%	(7%)	(0%)	14%	5%
Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) (NAICS 331492)	0%	0%	(21%)	1%	(7%)	1%	(0%)	3%
Iron Foundries (NAICS 331511)	0%	0%	51%	6%	(1%)	(4%)	(8%)	(7%)
Steel Foundries (except Investment) (NAICS 331513)	68%	(1%)	(21%)	(9%)	(14%)	(5%)	(26%)	(8%)
Nonferrous Metal Die-Casting Foundries (NAICS 331523)	0%	0%	0%	6%	(8%)	(5%)	(3%)	(6%)
Aluminum Foundries (except Die-Casting) (NAICS 331524)	0%	0%	13%	(1%)	3%	(6%)	5%	(0%)
Other Nonferrous Metal Foundries (except Die-Casting) (NAICS 331529)	Insf. Data	Insf. Data	11%	(6%)	5%	(6%)	13%	3%

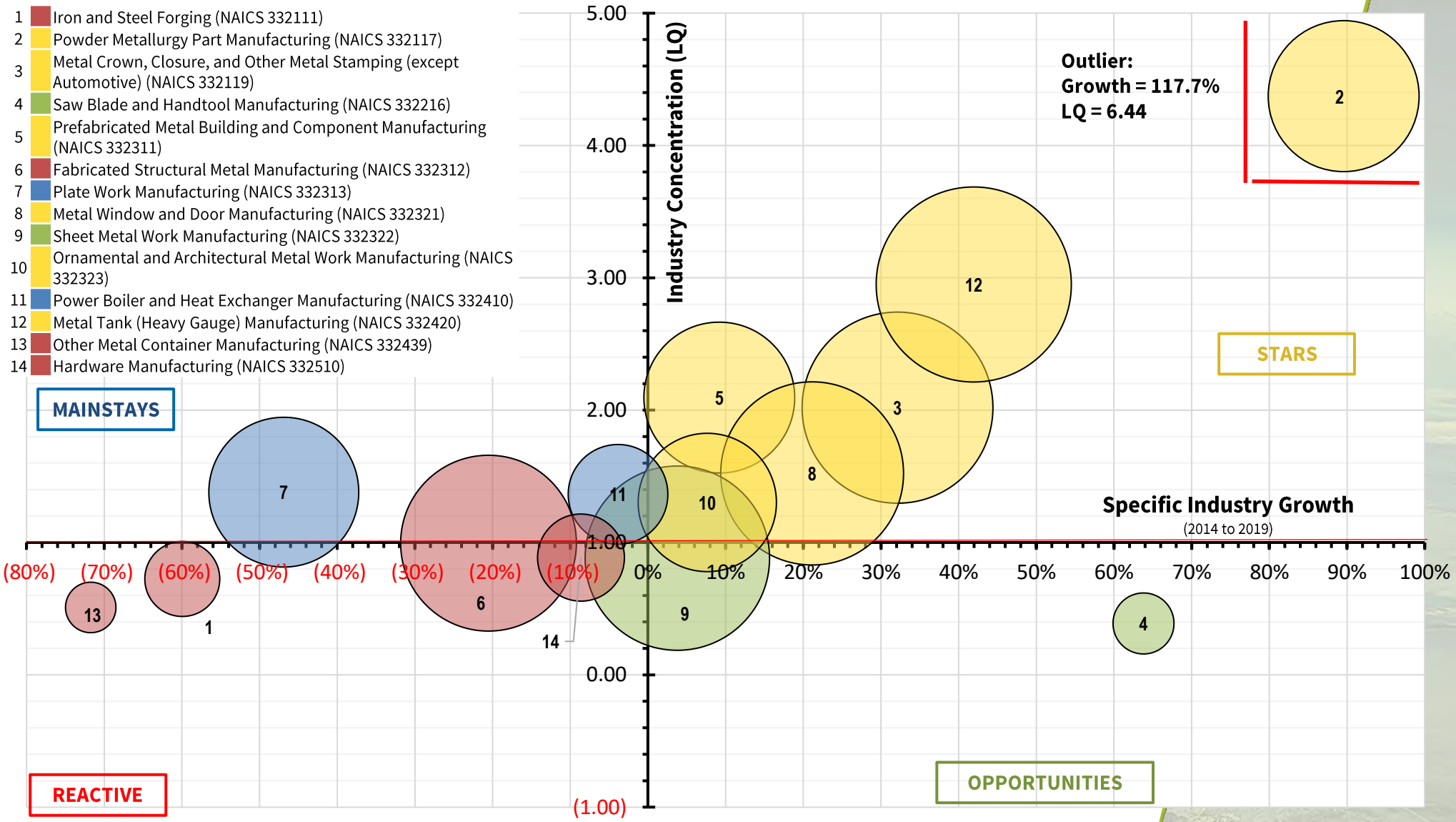
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Fabricated Metal Product Manufacturing Part I

NAICS 332



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 7,224

= 200 employees

Target Industry Analysis – Fabricated Metal Product Manufacturing Part I

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Iron and Steel Forging (NAICS 332111)	0	143	2,159
Powder Metallurgy Part Manufacturing (NAICS 332117)	0	542	5,641
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	162	913	2,579
Saw Blade and Handtool Manufacturing (NAICS 332216)	0	95	1,562
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	22	570	1,811
Fabricated Structural Metal Manufacturing (NAICS 332312)	58	774	4,305
Plate Work Manufacturing (NAICS 332313)	0	564	3,241
Metal Window and Door Manufacturing (NAICS 332321)	0	837	4,653
Sheet Metal Work Manufacturing (NAICS 332322)	58	850	5,399
Ornamental and Architectural Metal Work Manufacturing (NAICS 332323)	0	479	3,095
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	0	250	1,112
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	0	951	1,879
Other Metal Container Manufacturing (NAICS 332439)	0	65	490
Hardware Manufacturing (NAICS 332510)	0	191	853

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Fabricated Metal Product Manufacturing Part I

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Iron and Steel Forging (NAICS 332111)	0.00	0.72	2.31
Powder Metallurgy Part Manufacturing (NAICS 332117)	0.00	6.44	14.14
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	11.33	2.02	1.20
Saw Blade and Handtool Manufacturing (NAICS 332216)	0.00	0.39	1.35
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	2.50	2.09	1.40
Fabricated Structural Metal Manufacturing (NAICS 332312)	2.37	0.99	1.17
Plate Work Manufacturing (NAICS 332313)	0.00	1.38	1.67
Metal Window and Door Manufacturing (NAICS 332321)	0.00	1.52	1.79
Sheet Metal Work Manufacturing (NAICS 332322)	1.91	0.88	1.18
Ornamental and Architectural Metal Work Manufacturing (NAICS 332323)	0.00	1.30	1.78
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	0.00	1.36	1.28
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	0.00	2.95	1.23
Other Metal Container Manufacturing (NAICS 332439)	0.00	0.51	0.81
Hardware Manufacturing (NAICS 332510)	0.00	0.89	0.83

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Fabricated Metal Product Manufacturing Part I

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Iron and Steel Forging (NAICS 332111)	Insf. Data	$97,182	$66,119	$66,854
Powder Metallurgy Part Manufacturing (NAICS 332117)	Insf. Data	$48,590	$49,210	$52,462
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	$60,527	$51,019	$52,952	$54,633
Saw Blade and Handtool Manufacturing (NAICS 332216)	Insf. Data	$44,704	$51,422	$57,812
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	$65,149	$75,080	$63,148	$57,886
Fabricated Structural Metal Manufacturing (NAICS 332312)	$48,530	$52,249	$58,594	$59,574
Plate Work Manufacturing (NAICS 332313)	Insf. Data	$54,948	$58,805	$60,442
Metal Window and Door Manufacturing (NAICS 332321)	Insf. Data	$52,169	$50,445	$50,054
Sheet Metal Work Manufacturing (NAICS 332322)	$29,613	$52,857	$52,871	$53,497
Ornamental and Architectural Metal Work Manufacturing (NAICS 332323)	Insf. Data	$59,866	$60,968	$54,222
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	Insf. Data	$79,191	$69,621	$73,361
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	Insf. Data	$62,873	$62,106	$61,645
Other Metal Container Manufacturing (NAICS 332439)	Insf. Data	$61,081	$55,044	$53,566
Hardware Manufacturing (NAICS 332510)	Insf. Data	$47,230	$57,224	$62,224

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions
Wages higher than other regions

Target Industry Analysis – Fabricated Metal Product Manufacturing Part I

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Iron and Steel Forging (NAICS 332111)	0%	0%	(60%)	(40%)	(18%)	(10%)	(5%)	(0%)
Powder Metallurgy Part Manufacturing (NAICS 332117)	0%	0%	118%	24%	15%	1%	17%	4%
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	71%	(1%)	32%	15%	1%	0%	1%	(2%)
Saw Blade and Handtool Manufacturing (NAICS 332216)	0%	0%	64%	(16%)	10%	(2%)	(5%)	(5%)
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	Insf. Data	50%	9%	7%	8%	3%	12%	7%
Fabricated Structural Metal Manufacturing (NAICS 332312)	100%	(17%)	(21%)	(15%)	1%	(6%)	3%	1%
Plate Work Manufacturing (NAICS 332313)	0%	0%	(47%)	(23%)	(17%)	(5%)	(1%)	5%
Metal Window and Door Manufacturing (NAICS 332321)	0%	0%	21%	(15%)	32%	1%	22%	3%
Sheet Metal Work Manufacturing (NAICS 332322)	(52%)	(36%)	4%	(4%)	10%	(1%)	13%	4%
Ornamental and Architectural Metal Work Manufacturing (NAICS 332323)	0%	0%	8%	(0%)	25%	7%	16%	7%
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	0%	0%	(4%)	(5%)	(33%)	(13%)	(11%)	2%
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	0%	0%	42%	5%	9%	2%	0%	9%
Other Metal Container Manufacturing (NAICS 332439)	0%	0%	(72%)	(49%)	3%	(4%)	(4%)	4%
Hardware Manufacturing (NAICS 332510)	0%	0%	(9%)	(11%)	29%	(1%)	7%	(1%)

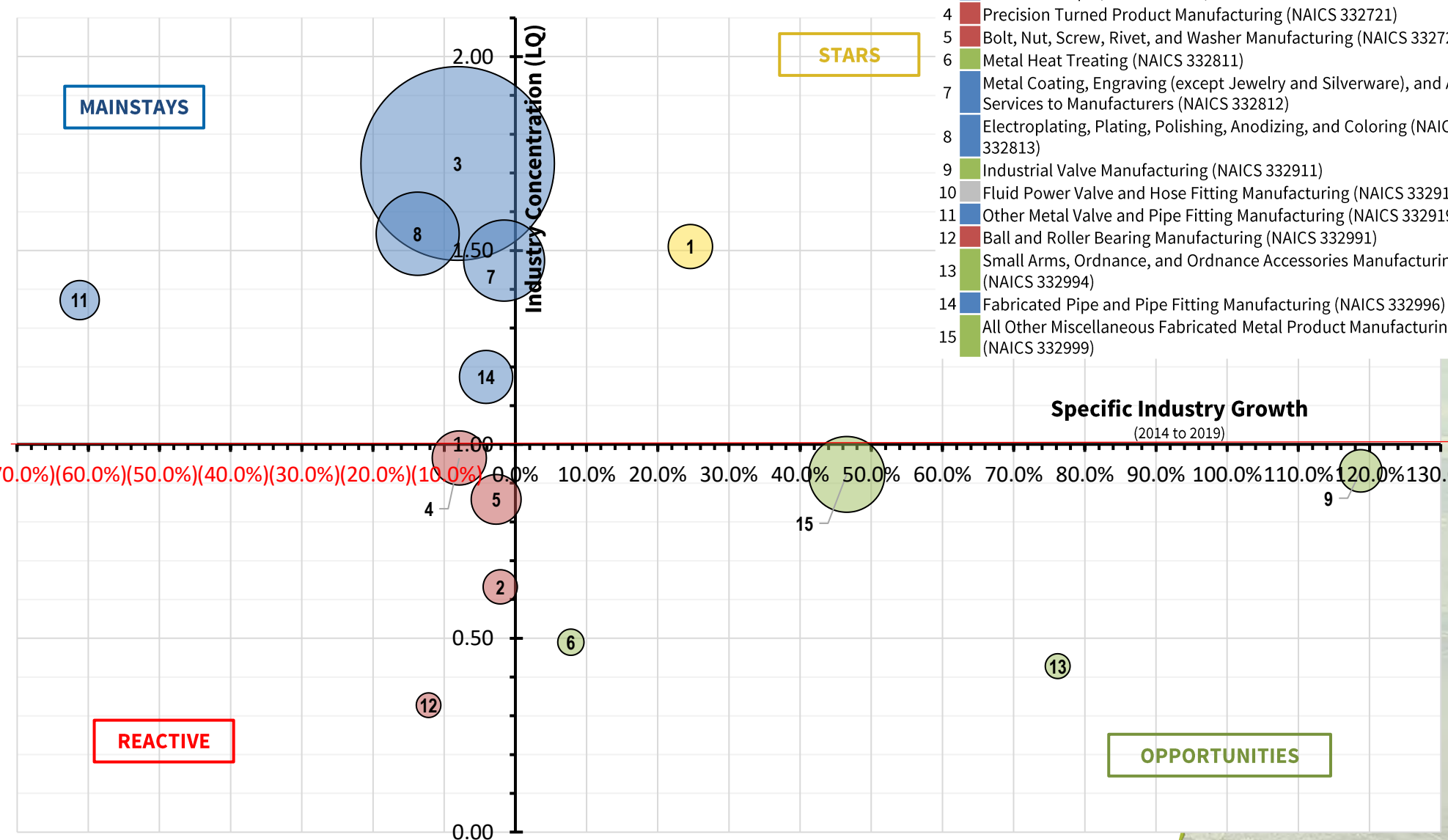
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Fabricated Metal Product Manufacturing Part II

NAICS 332



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 8,440

= 800 employees

Target Industry Analysis – Fabricated Metal Product Manufacturing Part II

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Spring Manufacturing (NAICS 332613)	0	228	1,038
Other Fabricated Wire Product Manufacturing (NAICS 332618)	10	139	1,745
Machine Shops (NAICS 332710)	113	4,233	17,329
Precision Turned Product Manufacturing (NAICS 332721)	<10	339	2,802
Bolt, Nut, Screw, Rivet, and Washer Manufacturing (NAICS 332722)	0	289	2,180
Metal Heat Treating (NAICS 332811)	0	83	774
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	10	752	2,916
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	83	792	2,449
Industrial Valve Manufacturing (NAICS 332911)	<10	210	1,321
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	0	64	1,113
Other Metal Valve and Pipe Fitting Manufacturing (NAICS 332919)	0	180	1,244
Ball and Roller Bearing Manufacturing (NAICS 332991)	0	72	472
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	0	74	1,055
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	82	326	2,021
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	<10	661	3,913

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Fabricated Metal Product Manufacturing Part II

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Spring Manufacturing (NAICS 332613)	0.00	1.51	1.45
Other Fabricated Wire Product Manufacturing (NAICS 332618)	1.48	0.63	1.68
Machine Shops (NAICS 332710)	1.45	1.72	1.49
Precision Turned Product Manufacturing (NAICS 332721)	0.03	0.96	1.68
Bolt, Nut, Screw, Rivet, and Washer Manufacturing (NAICS 332722)	0.00	0.86	1.37
Metal Heat Treating (NAICS 332811)	0.00	0.49	0.96
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	0.62	1.47	1.21
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	5.09	1.54	1.01
Industrial Valve Manufacturing (NAICS 332911)	0.21	0.93	1.23
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	0.00	0.20	0.74
Other Metal Valve and Pipe Fitting Manufacturing (NAICS 332919)	0.00	1.37	2.00
Ball and Roller Bearing Manufacturing (NAICS 332991)	0.00	0.33	0.45
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	0.00	0.43	1.29
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	9.33	1.17	1.54
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	0.05	0.92	1.15

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Fabricated Metal Product Manufacturing Part II

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Spring Manufacturing (NAICS 332613)	Insf. Data	$55,939	$61,143	$58,547
Other Fabricated Wire Product Manufacturing (NAICS 332618)	$56,215	$53,462	$59,415	$51,592
Machine Shops (NAICS 332710)	$52,971	$54,996	$54,051	$55,125
Precision Turned Product Manufacturing (NAICS 332721)	Insf. Data	$51,259	$55,688	$54,509
Bolt, Nut, Screw, Rivet, and Washer Manufacturing (NAICS 332722)	Insf. Data	$54,738	$69,719	$63,836
Metal Heat Treating (NAICS 332811)	Insf. Data	$77,875	$58,792	$63,093
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	$59,827	$68,281	$54,464	$49,608
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	$57,231	$55,911	$50,133	$48,912
Industrial Valve Manufacturing (NAICS 332911)	Insf. Data	$74,207	$70,174	$73,634
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	Insf. Data	$105,184	$62,689	$71,837
Other Metal Valve and Pipe Fitting Manufacturing (NAICS 332919)	Insf. Data	$65,765	$65,710	$63,121
Ball and Roller Bearing Manufacturing (NAICS 332991)	Insf. Data	$74,492	$98,251	$64,185
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	Insf. Data	$48,468	$52,150	$63,623
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	$54,195	$66,960	$60,206	$60,219
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	Insf. Data	$59,806	$57,529	$55,982

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Fabricated Metal Product Manufacturing Part II

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Spring Manufacturing (NAICS 332613)	0%	0%	25%	(3%)	1%	3%	8%	4%
Other Fabricated Wire Product Manufacturing (NAICS 332618)	Insf. Data	Insf. Data	(2%)	(9%)	(15%)	(14%)	(2%)	(4%)
Machine Shops (NAICS 332710)	(28%)	(14%)	(8%)	0%	(1%)	3%	(2%)	5%
Precision Turned Product Manufacturing (NAICS 332721)	Insf. Data	Insf. Data	(8%)	(11%)	(5%)	(6%)	(0%)	(5%)
Bolt, Nut, Screw, Rivet, and Washer Manufacturing (NAICS 332722)	0%	0%	(3%)	(6%)	(12%)	(15%)	(0%)	(7%)
Metal Heat Treating (NAICS 332811)	0%	0%	8%	(1%)	8%	1%	2%	3%
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	(38%)	Insf. Data	(2%)	0%	11%	3%	8%	4%
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	(27%)	(13%)	(14%)	(11%)	0%	(3%)	(3%)	(4%)
Industrial Valve Manufacturing (NAICS 332911)	Insf. Data	Insf. Data	119%	16%	(1%)	3%	(6%)	2%
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	0%	0%	Insf. Data	19%	(6%)	1%	(3%)	3%
Other Metal Valve and Pipe Fitting Manufacturing (NAICS 332919)	0%	0%	(61%)	(33%)	(14%)	1%	(2%)	2%
Ball and Roller Bearing Manufacturing (NAICS 332991)	0%	0%	(12%)	3%	(20%)	(23%)	(4%)	(3%)
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	0%	0%	76%	20%	145%	21%	9%	7%
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	(20%)	(12%)	(4%)	10%	5%	4%	(13%)	3%
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	Insf. Data	Insf. Data	47%	6%	23%	3%	9%	3%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Machine & Equipment Manufacturing Part I

NAICS 333

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 6,340

= 400 employees

Target Industry Analysis – Machine & Equipment Manufacturing Part I

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Farm Machinery and Equipment Manufacturing (NAICS 333111)	0	67	1,122
Construction Machinery Manufacturing (NAICS 333120)	0	263	5,013
Mining Machinery and Equipment Manufacturing (NAICS 333131)	93	478	1,528
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	0	136	364
Printing Machinery and Equipment Manufacturing (NAICS 333244)	0	63	248
Other Industrial Machinery Manufacturing (NAICS 333249)	46	636	3,667
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	0	702	2,096
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing (NAICS 333413)	0	157	1,009
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	0	155	3,469
Industrial Mold Manufacturing (NAICS 333511)	0	308	1,570
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	<10	1,831	4,553
Cutting Tool and Machine Tool Accessory Manufacturing (NAICS 333515)	0	331	1,627
Machine Tool Manufacturing (NAICS 333517)	0	348	1,373
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	0	865	1,227

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Machine & Equipment Manufacturing Part I

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Farm Machinery and Equipment Manufacturing (NAICS 333111)	0.00	0.13	0.46
Construction Machinery Manufacturing (NAICS 333120)	0.00	0.43	1.74
Mining Machinery and Equipment Manufacturing (NAICS 333131)	33.82	5.49	3.71
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	0.00	0.27	0.15
Printing Machinery and Equipment Manufacturing (NAICS 333244)	0.00	1.10	0.91
Other Industrial Machinery Manufacturing (NAICS 333249)	2.98	1.30	1.58
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	0.00	1.27	0.80
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing (NAICS 333413)	0.00	0.61	0.83
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	0.00	0.21	0.97
Industrial Mold Manufacturing (NAICS 333511)	0.00	0.96	1.03
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	0.57	3.44	1.80
Cutting Tool and Machine Tool Accessory Manufacturing (NAICS 333515)	0.00	1.57	1.63
Machine Tool Manufacturing (NAICS 333517)	0.00	0.98	0.82
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	0.00	7.83	2.34

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Machine & Equipment Manufacturing Part I

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Farm Machinery and Equipment Manufacturing (NAICS 333111)	Insf. Data	$43,291	$56,703	$62,076
Construction Machinery Manufacturing (NAICS 333120)	Insf. Data	$74,955	$67,747	$76,648
Mining Machinery and Equipment Manufacturing (NAICS 333131)	$62,971	$74,723	$81,691	$71,417
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	Insf. Data	$97,226	$66,873	$94,872
Printing Machinery and Equipment Manufacturing (NAICS 333244)	Insf. Data	$74,078	$73,533	$65,681
Other Industrial Machinery Manufacturing (NAICS 333249)	$48,427	$58,778	$65,391	$68,897
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	Insf. Data	$81,758	$74,206	$70,379
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing (NAICS 333413)	Insf. Data	$54,778	$61,235	$55,882
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	Insf. Data	$61,291	$63,627	$58,349
Industrial Mold Manufacturing (NAICS 333511)	Insf. Data	$68,341	$59,067	$58,885
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	Insf. Data	$71,181	$62,657	$61,575
Cutting Tool and Machine Tool Accessory Manufacturing (NAICS 333515)	Insf. Data	$72,715	$58,457	$60,909
Machine Tool Manufacturing (NAICS 333517)	Insf. Data	$65,546	$60,939	$65,500
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	Insf. Data	$84,599	$78,793	$71,756

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions
Wages higher than other regions

Target Industry Analysis – Machine & Equipment Manufacturing Part I

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Farm Machinery and Equipment Manufacturing (NAICS 333111)	0%	0%	158%	10%	(0%)	(12%)	(9%)	(1%)
Construction Machinery Manufacturing (NAICS 333120)	0%	0%	199%	33%	9%	7%	1%	5%
Mining Machinery and Equipment Manufacturing (NAICS 333131)	(30%)	(22%)	(41%)	(14%)	(52%)	(22%)	(16%)	4%
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	0%	0%	(14%)	30%	(40%)	(7%)	(28%)	(6%)
Printing Machinery and Equipment Manufacturing (NAICS 333244)	0%	0%	62%	13%	(4%)	(2%)	(13%)	(8%)
Other Industrial Machinery Manufacturing (NAICS 333249)	(65%)	(57%)	(10%)	(5%)	13%	2%	8%	2%
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	0%	0%	(4%)	(14%)	(7%)	(12%)	9%	0%
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing (NAICS 333413)	0%	0%	(47%)	(10%)	(7%)	2%	3%	1%
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	0%	0%	(14%)	(2%)	6%	(3%)	7%	(2%)
Industrial Mold Manufacturing (NAICS 333511)	0%	0%	(23%)	(17%)	(16%)	(14%)	(1%)	(0%)
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	Insf. Data	Insf. Data	(15%)	(10%)	(8%)	(7%)	(3%)	(3%)
Cutting Tool and Machine Tool Accessory Manufacturing (NAICS 333515)	0%	0%	(1%)	(20%)	1%	4%	(6%)	1%
Machine Tool Manufacturing (NAICS 333517)	0%	0%	(15%)	(5%)	(11%)	(9%)	6%	4%
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	0%	0%	11%	(1%)	5%	0%	6%	6%

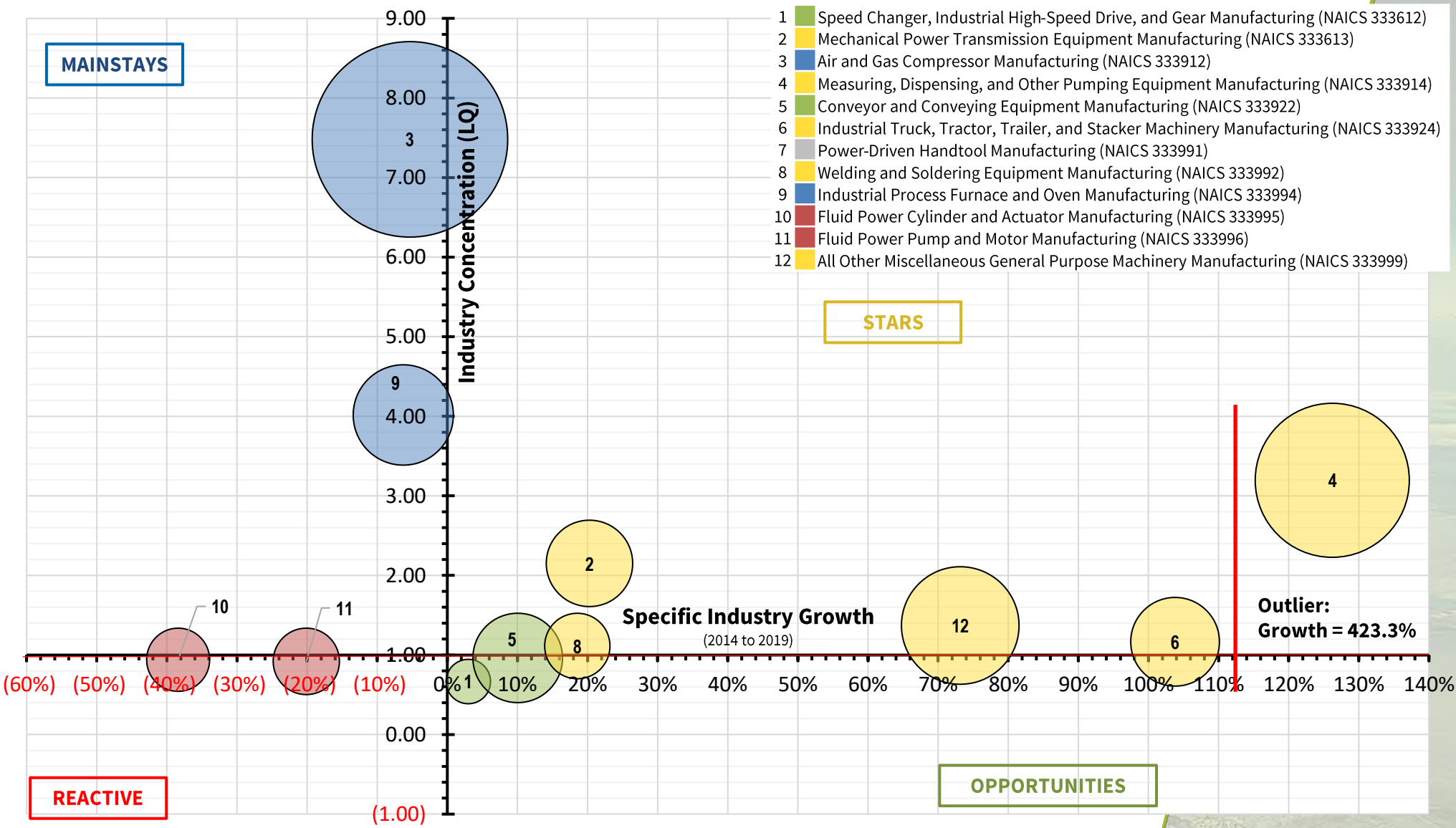
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Machine & Equipment Manufacturing Part II

NAICS 333



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 4,268

= 250 employees

Target Industry Analysis – Machine & Equipment Manufacturing Part II

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	0	69	179
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	0	255	854
Air and Gas Compressor Manufacturing (NAICS 333912)	0	1,294	1,562
Measuring, Dispensing, and Other Pumping Equipment Manufacturing (NAICS 333914)	0	785	1,855
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	0	274	1,576
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924)	0	269	971
Power-Driven Handtool Manufacturing (NAICS 333991)	0	71	175
Welding and Soldering Equipment Manufacturing (NAICS 333992)	0	147	489
Industrial Process Furnace and Oven Manufacturing (NAICS 333994)	15	343	900
Fluid Power Cylinder and Actuator Manufacturing (NAICS 333995)	0	138	602
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	0	151	434
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	<10	471	1,610

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Machine & Equipment Manufacturing Part II

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	0.00	0.67	0.37
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	0.00	2.15	1.52
Air and Gas Compressor Manufacturing (NAICS 333912)	0.00	7.48	1.91
Measuring, Dispensing, and Other Pumping Equipment Manufacturing (NAICS 333914)	0.00	3.17	1.58
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	0.00	0.96	1.17
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924)	0.00	1.17	0.89
Power-Driven Handtool Manufacturing (NAICS 333991)	0.00	0.88	0.46
Welding and Soldering Equipment Manufacturing (NAICS 333992)	0.00	1.11	0.78
Industrial Process Furnace and Oven Manufacturing (NAICS 333994)	5.37	4.02	2.22
Fluid Power Cylinder and Actuator Manufacturing (NAICS 333995)	0.00	0.94	0.87
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	0.00	0.92	0.56
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	0.63	1.37	0.99

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Machine & Equipment Manufacturing Part II

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	Insf. Data	$72,234	$88,461	$64,992
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	Insf. Data	$80,097	$59,809	$63,262
Air and Gas Compressor Manufacturing (NAICS 333912)	Insf. Data	$88,519	$85,605	$86,304
Measuring, Dispensing, and Other Pumping Equipment Manufacturing (NAICS 333914)	Insf. Data	$108,588	$89,280	$74,609
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	Insf. Data	$88,718	$74,502	$67,205
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924)	Insf. Data	$55,156	$61,574	$60,761
Power-Driven Handtool Manufacturing (NAICS 333991)	Insf. Data	$81,228	$72,897	$66,361
Welding and Soldering Equipment Manufacturing (NAICS 333992)	Insf. Data	$59,375	$61,711	$79,614
Industrial Process Furnace and Oven Manufacturing (NAICS 333994)	$59,485	$74,634	$67,942	$69,470
Fluid Power Cylinder and Actuator Manufacturing (NAICS 333995)	Insf. Data	$47,872	$58,347	$63,059
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	Insf. Data	$66,549	$76,815	$83,648
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	Insf. Data	$69,558	$71,991	$66,985

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Machine & Equipment Manufacturing Part II

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	0%	0%	3%	(1%)	5%	(3%)	(5%)	1%
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	0%	0%	20%	15%	(7%)	(1%)	1%	3%
Air and Gas Compressor Manufacturing (NAICS 333912)	0%	0%	(5%)	(2%)	(11%)	(2%)	(5%)	1%
Measuring, Dispensing, and Other Pumping Equipment Manufacturing (NAICS 333914)	0%	0%	423%	31%	90%	14%	(9%)	(2%)
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	0%	0%	10%	(2%)	(1%)	(4%)	14%	4%
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924)	0%	0%	104%	19%	22%	11%	19%	8%
Power-Driven Handtool Manufacturing (NAICS 333991)	0%	0%	Insf. Data	46%	2%	34%	15%	7%
Welding and Soldering Equipment Manufacturing (NAICS 333992)	0%	0%	19%	10%	(3%)	(1%)	4%	2%
Industrial Process Furnace and Oven Manufacturing (NAICS 333994)	(21%)	Insf. Data	(6%)	(10%)	(14%)	(10%)	(0%)	(3%)
Fluid Power Cylinder and Actuator Manufacturing (NAICS 333995)	0%	0%	(38%)	(4%)	16%	10%	1%	4%
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	0%	0%	(20%)	14%	(33%)	(14%)	4%	1%
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	Insf. Data	Insf. Data	73%	10%	7%	3%	(1%)	1%

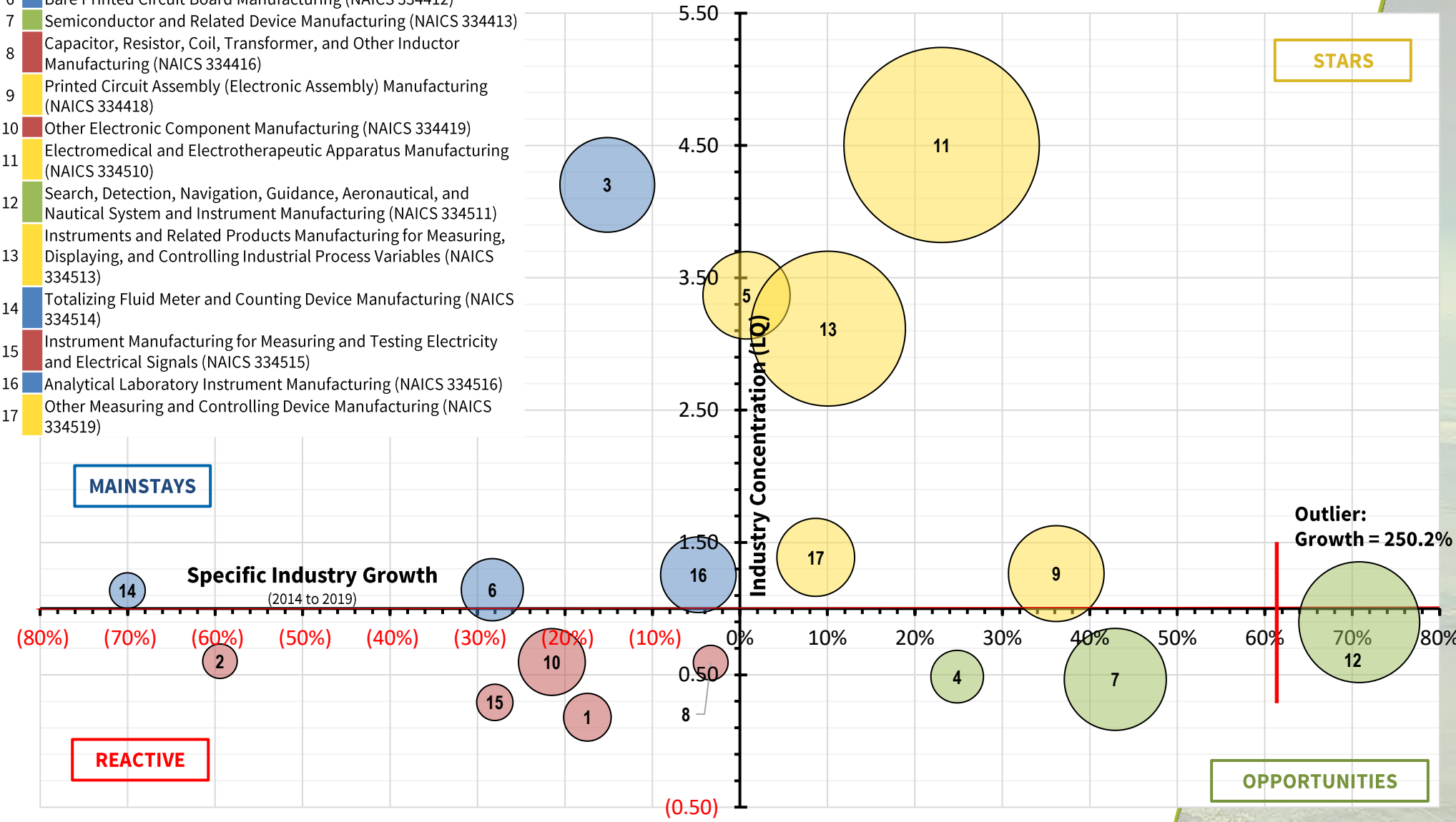
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.
Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Electronics & Instrument Manufacturing

NAICS 334

1. Electronic Computer Manufacturing (NAICS 334111)
2. Computer Storage Device Manufacturing (NAICS 334112)
3. Telephone Apparatus Manufacturing (NAICS 334210)
4. Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)
5. Other Communications Equipment Manufacturing (NAICS 334290)
6. Bare Printed Circuit Board Manufacturing (NAICS 334412)
7. Semiconductor and Related Device Manufacturing (NAICS 334413)
8. Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)
9. Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)
10. Other Electronic Component Manufacturing (NAICS 334419)
11. Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)
12. Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)
13. Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)
14. Totalizing Fluid Meter and Counting Device Manufacturing (NAICS 334514)
15. Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)
16. Analytical Laboratory Instrument Manufacturing (NAICS 334516)
17. Other Measuring and Controlling Device Manufacturing (NAICS 334519)



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 9,936

= 600 employees

Target Industry Analysis – Electronics & Instrument Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Electronic Computer Manufacturing (NAICS 334111)	0	161	559
Computer Storage Device Manufacturing (NAICS 334112)	0	86	87
Telephone Apparatus Manufacturing (NAICS 334210)	0	627	1,204
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)	0	196	864
Other Communications Equipment Manufacturing (NAICS 334290)	0	533	1,001
Bare Printed Circuit Board Manufacturing (NAICS 334412)	0	271	319
Semiconductor and Related Device Manufacturing (NAICS 334413)	0	726	2,161
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	0	87	902
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	0	640	2,993
Other Electronic Component Manufacturing (NAICS 334419)	129	314	2,448
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	0	2,636	3,692
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	431	984	2,551
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	0	1,659	3,896
Totalizing Fluid Meter and Counting Device Manufacturing (NAICS 334514)	79	92	1,759
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	20	95	486
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	14	401	1,261
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	75	426	1,316

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Electronics & Instrument Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Electronic Computer Manufacturing (NAICS 334111)	0.00	0.18	0.13
Computer Storage Device Manufacturing (NAICS 334112)	0.00	0.60	0.13
Telephone Apparatus Manufacturing (NAICS 334210)	0.00	4.20	1.70
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)	0.00	0.49	0.45
Other Communications Equipment Manufacturing (NAICS 334290)	0.00	3.37	1.34
Bare Printed Circuit Board Manufacturing (NAICS 334412)	0.00	1.14	0.28
Semiconductor and Related Device Manufacturing (NAICS 334413)	0.00	0.47	0.29
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	0.00	0.59	1.30
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	0.00	1.26	1.25
Other Electronic Component Manufacturing (NAICS 334419)	7.73	0.60	0.98
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	0.00	4.50	1.33
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	12.45	0.90	0.49
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	0.00	3.12	1.54
Totalizing Fluid Meter and Counting Device Manufacturing (NAICS 334514)	30.91	1.14	4.57
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	2.00	0.29	0.32
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	1.36	1.26	0.83
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	7.74	1.39	0.91

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Electronics & Instrument Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Electronic Computer Manufacturing (NAICS 334111)	Insf. Data	$113,532	$104,861	$241,556
Computer Storage Device Manufacturing (NAICS 334112)	Insf. Data	$211,009	$209,707	$146,808
Telephone Apparatus Manufacturing (NAICS 334210)	Insf. Data	$64,181	$70,925	$132,742
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)	Insf. Data	$76,728	$79,940	$113,635
Other Communications Equipment Manufacturing (NAICS 334290)	Insf. Data	$100,739	$91,636	$86,461
Bare Printed Circuit Board Manufacturing (NAICS 334412)	Insf. Data	$46,378	$49,302	$68,736
Semiconductor and Related Device Manufacturing (NAICS 334413)	Insf. Data	$112,124	$138,445	$163,927
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	Insf. Data	$46,874	$55,545	$59,056
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	Insf. Data	$50,244	$50,481	$60,058
Other Electronic Component Manufacturing (NAICS 334419)	$44,003	$52,818	$54,589	$71,439
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	Insf. Data	$76,275	$74,501	$119,190
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	$50,178	$70,581	$75,933	$116,396
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	Insf. Data	$72,415	$73,545	$85,387
Totalizing Fluid Meter and Counting Device Manufacturing (NAICS 334514)	$173,781	$173,589	$69,308	$75,707
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	$53,755	$81,456	$79,153	$117,508
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	$64,336	$75,143	$76,503	$106,155
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	$64,172	$69,055	$72,912	$89,652

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions
Wages higher than other regions

Target Industry Analysis – Electronics & Instrument Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Electronic Computer Manufacturing (NAICS 334111)	0%	0%	(17%)	(42%)	(27%)	(25%)	12%	2%
Computer Storage Device Manufacturing (NAICS 334112)	0%	0%	(59%)	(50%)	(59%)	(51%)	(23%)	(14%)
Telephone Apparatus Manufacturing (NAICS 334210)	0%	0%	(15%)	(30%)	(20%)	(34%)	(20%)	(17%)
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)	0%	0%	25%	18%	(5%)	(6%)	(9%)	(13%)
Other Communications Equipment Manufacturing (NAICS 334290)	0%	0%	1%	(2%)	(5%)	(4%)	(2%)	(7%)
Bare Printed Circuit Board Manufacturing (NAICS 334412)	0%	0%	(28%)	28%	(47%)	15%	(11%)	(13%)
Semiconductor and Related Device Manufacturing (NAICS 334413)	0%	0%	43%	15%	31%	3%	3%	(5%)
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	0%	0%	(3%)	(5%)	(10%)	(7%)	(3%)	(3%)
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	0%	0%	36%	13%	(4%)	3%	14%	6%
Other Electronic Component Manufacturing (NAICS 334419)	706%	38%	(22%)	0%	(18%)	(9%)	(6%)	(3%)
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	0%	0%	23%	12%	28%	10%	26%	4%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	368%	32%	250%	35%	40%	11%	6%	(3%)
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	Insf. Data	0%	10%	12%	(3%)	0%	1%	0%
Totalizing Fluid Meter and Counting Device Manufacturing (NAICS 334514)	(74%)	(66%)	(70%)	(65%)	(3%)	1%	(7%)	(2%)
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	(44%)	(50%)	(28%)	(40%)	(16%)	(20%)	2%	(5%)
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	Insf. Data	50%	(5%)	(4%)	(2%)	(4%)	13%	2%
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	295%	35%	9%	2%	(8%)	(2%)	3%	1%

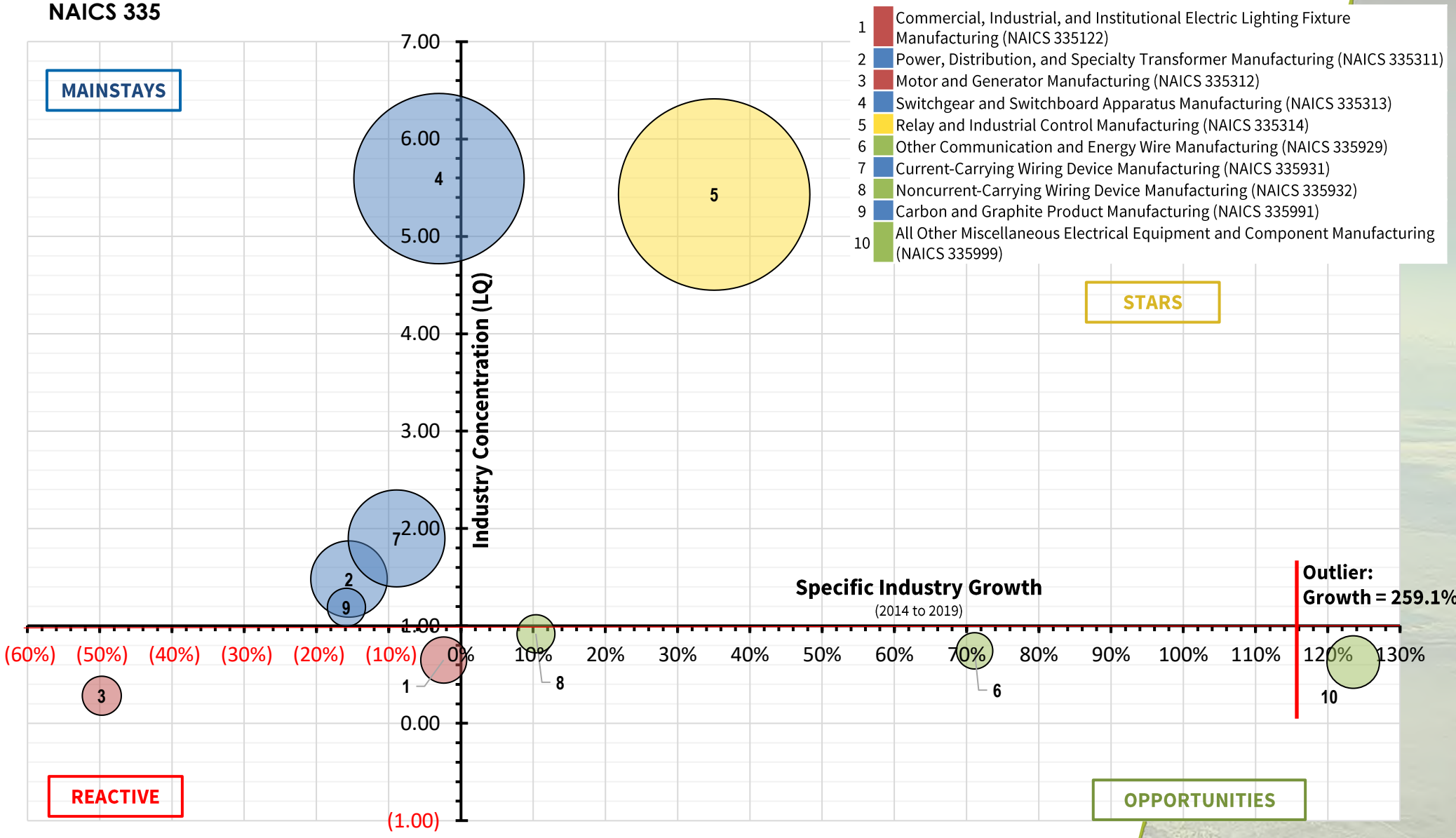
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Electronic Equipment Manufacturing

NAICS 335



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 5,182

= 500 employees

Target Industry Analysis – Electronic Equipment Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (NAICS 335122)	0	123	646
Power, Distribution, and Specialty Transformer Manufacturing (NAICS 335311)	0	333	561
Motor and Generator Manufacturing (NAICS 335312)	0	89	576
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	0	1,634	2,587
Relay and Industrial Control Manufacturing (NAICS 335314)	0	2,065	4,112
Other Communication and Energy Wire Manufacturing (NAICS 335929)	0	77	798
Current-Carrying Wiring Device Manufacturing (NAICS 335931)	0	532	4,568
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	<10	85	664
Carbon and Graphite Product Manufacturing (NAICS 335991)	0	85	1,324
All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	0	158	1,357

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Electronic Equipment Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (NAICS 335122)	0.00	0.65	0.72
Power, Distribution, and Specialty Transformer Manufacturing (NAICS 335311)	0.00	1.48	0.53
Motor and Generator Manufacturing (NAICS 335312)	0.00	0.28	0.39
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	0.00	5.59	1.87
Relay and Industrial Control Manufacturing (NAICS 335314)	0.00	5.43	2.28
Other Communication and Energy Wire Manufacturing (NAICS 335929)	0.00	0.74	1.62
Current-Carrying Wiring Device Manufacturing (NAICS 335931)	0.00	1.90	3.44
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	0.49	0.92	1.52
Carbon and Graphite Product Manufacturing (NAICS 335991)	0.00	1.19	3.90
All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	0.00	0.61	1.10

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Electronic Equipment Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (NAICS 335122)	Insf. Data	$52,566	$52,378	$66,979
Power, Distribution, and Specialty Transformer Manufacturing (NAICS 335311)	Insf. Data	$47,215	$59,784	$67,523
Motor and Generator Manufacturing (NAICS 335312)	Insf. Data	$59,699	$62,582	$64,872
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	Insf. Data	$88,090	$77,636	$72,453
Relay and Industrial Control Manufacturing (NAICS 335314)	Insf. Data	$87,573	$90,069	$80,825
Other Communication and Energy Wire Manufacturing (NAICS 335929)	Insf. Data	$63,263	$56,473	$63,103
Current-Carrying Wiring Device Manufacturing (NAICS 335931)	Insf. Data	$63,090	$73,513	$69,361
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	Insf. Data	$85,164	$50,631	$61,458
Carbon and Graphite Product Manufacturing (NAICS 335991)	Insf. Data	$76,216	$61,318	$67,493
All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	Insf. Data	$50,645	$62,995	$77,809

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions
Wages higher than other regions

Target Industry Analysis – Electronic Equipment Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (NAICS 335122)	0%	0%	(2%)	(11%)	(33%)	(29%)	7%	1%
Power, Distribution, and Specialty Transformer Manufacturing (NAICS 335311)	0%	0%	(15%)	(22%)	(0%)	1%	8%	4%
Motor and Generator Manufacturing (NAICS 335312)	0%	0%	(50%)	(25%)	(4%)	0%	(5%)	(2%)
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	0%	0%	(3%)	4%	1%	5%	3%	3%
Relay and Industrial Control Manufacturing (NAICS 335314)	0%	0%	35%	7%	12%	3%	(1%)	(1%)
Other Communication and Energy Wire Manufacturing (NAICS 335929)	0%	0%	71%	19%	2%	8%	(9%)	2%
Current-Carrying Wiring Device Manufacturing (NAICS 335931)	0%	0%	(9%)	18%	(1%)	(5%)	5%	(2%)
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	Insf. Data	Insf. Data	10%	22%	18%	(1%)	4%	1%
Carbon and Graphite Product Manufacturing (NAICS 335991)	0%	0%	(16%)	(9%)	1%	3%	13%	7%
All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	0%	0%	259%	34%	4%	6%	8%	5%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Transportation Equipment Manufacturing

NAICS 336

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 3,579

= 240 employees

Target Industry Analysis – Transportation Equipment Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Motor Vehicle Body Manufacturing (NAICS 336211)	0	450	4,321
Truck Trailer Manufacturing (NAICS 336212)	0	299	1,922
Travel Trailer and Camper Manufacturing (NAICS 336214)	0	69	1,009
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	87	116	1,094
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	0	197	1,709
Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350)	34	85	1,082
Motor Vehicle Seating and Interior Trim Manufacturing (NAICS 336360)	0	70	981
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	108	238	2,217
Aircraft Manufacturing (NAICS 336411)	0	446	5,488
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	0	97	1,416
Railroad Rolling Stock Manufacturing (NAICS 336510)	0	1,085	5,147
Ship Building and Repairing (NAICS 336611)	86	98	698
Boat Building (NAICS 336612)	111	113	148
Military Armored Vehicle, Tank, and Tank Component Manufacturing (NAICS 336992)	0	215	2,466

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Transportation Equipment Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Motor Vehicle Body Manufacturing (NAICS 336211)	0.00	0.91	1.85
Truck Trailer Manufacturing (NAICS 336212)	0.00	0.88	1.19
Travel Trailer and Camper Manufacturing (NAICS 336214)	0.00	0.17	0.54
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	5.08	0.21	0.42
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	0.00	0.36	0.66
Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350)	1.48	0.12	0.32
Motor Vehicle Seating and Interior Trim Manufacturing (NAICS 336360)	0.00	0.11	0.31
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	2.57	0.18	0.35
Aircraft Manufacturing (NAICS 336411)	0.00	0.23	0.59
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	0.00	0.10	0.31
Railroad Rolling Stock Manufacturing (NAICS 336510)	0.00	5.39	5.40
Ship Building and Repairing (NAICS 336611)	3.32	0.12	0.18
Boat Building (NAICS 336612)	9.26	0.30	0.08
Military Armored Vehicle, Tank, and Tank Component Manufacturing (NAICS 336992)	0.00	3.41	8.25

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Transportation Equipment Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Motor Vehicle Body Manufacturing (NAICS 336211)	Insf. Data	$47,547	$50,789	$55,418
Truck Trailer Manufacturing (NAICS 336212)	Insf. Data	$40,265	$46,854	$47,587
Travel Trailer and Camper Manufacturing (NAICS 336214)	Insf. Data	$43,871	$42,230	$50,159
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	$50,505	$59,398	$51,982	$64,426
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	Insf. Data	$60,772	$43,094	$61,082
Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350)	$49,728	$69,801	$67,173	$70,548
Motor Vehicle Seating and Interior Trim Manufacturing (NAICS 336360)	Insf. Data	$28,798	$53,525	$53,352
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	$39,377	$59,490	$65,363	$55,567
Aircraft Manufacturing (NAICS 336411)	Insf. Data	$70,158	$119,867	$112,848
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	Insf. Data	$89,512	$86,504	$76,625
Railroad Rolling Stock Manufacturing (NAICS 336510)	Insf. Data	$116,629	$90,442	$72,223
Ship Building and Repairing (NAICS 336611)	$79,321	$86,195	$77,579	$71,663
Boat Building (NAICS 336612)	$51,608	$50,670	$44,726	$48,115
Military Armored Vehicle, Tank, and Tank Component Manufacturing (NAICS 336992)	Insf. Data	$38,139	$78,915	$78,899

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions
Wages higher than other regions

Target Industry Analysis – Transportation Equipment Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Motor Vehicle Body Manufacturing (NAICS 336211)	0%	0%	15%	(8%)	23%	3%	7%	3%
Truck Trailer Manufacturing (NAICS 336212)	0%	0%	(11%)	11%	39%	10%	13%	8%
Travel Trailer and Camper Manufacturing (NAICS 336214)	0%	0%	116%	26%	46%	8%	36%	8%
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	181%	22%	76%	23%	(11%)	(2%)	3%	1%
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	0%	0%	19%	12%	(16%)	3%	16%	5%
Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350)	48%	53%	193%	49%	2%	7%	11%	6%
Motor Vehicle Seating and Interior Trim Manufacturing (NAICS 336360)	0%	0%	Insf. Data	33%	285%	20%	23%	12%
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	64%	39%	61%	33%	(0%)	7%	11%	5%
Aircraft Manufacturing (NAICS 336411)	0%	0%	Insf. Data	39%	(22%)	(14%)	2%	(3%)
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	0%	0%	(73%)	(25%)	(14%)	11%	7%	2%
Railroad Rolling Stock Manufacturing (NAICS 336510)	0%	0%	(21%)	(15%)	(30%)	(18%)	(12%)	2%
Ship Building and Repairing (NAICS 336611)	(38%)	(14%)	(39%)	(17%)	(43%)	(38%)	(6%)	(3%)
Boat Building (NAICS 336612)	909%	17%	606%	18%	244%	19%	32%	8%
Military Armored Vehicle, Tank, and Tank Component Manufacturing (NAICS 336992)	0%	0%	(29%)	(7%)	10%	(1%)	22%	2%

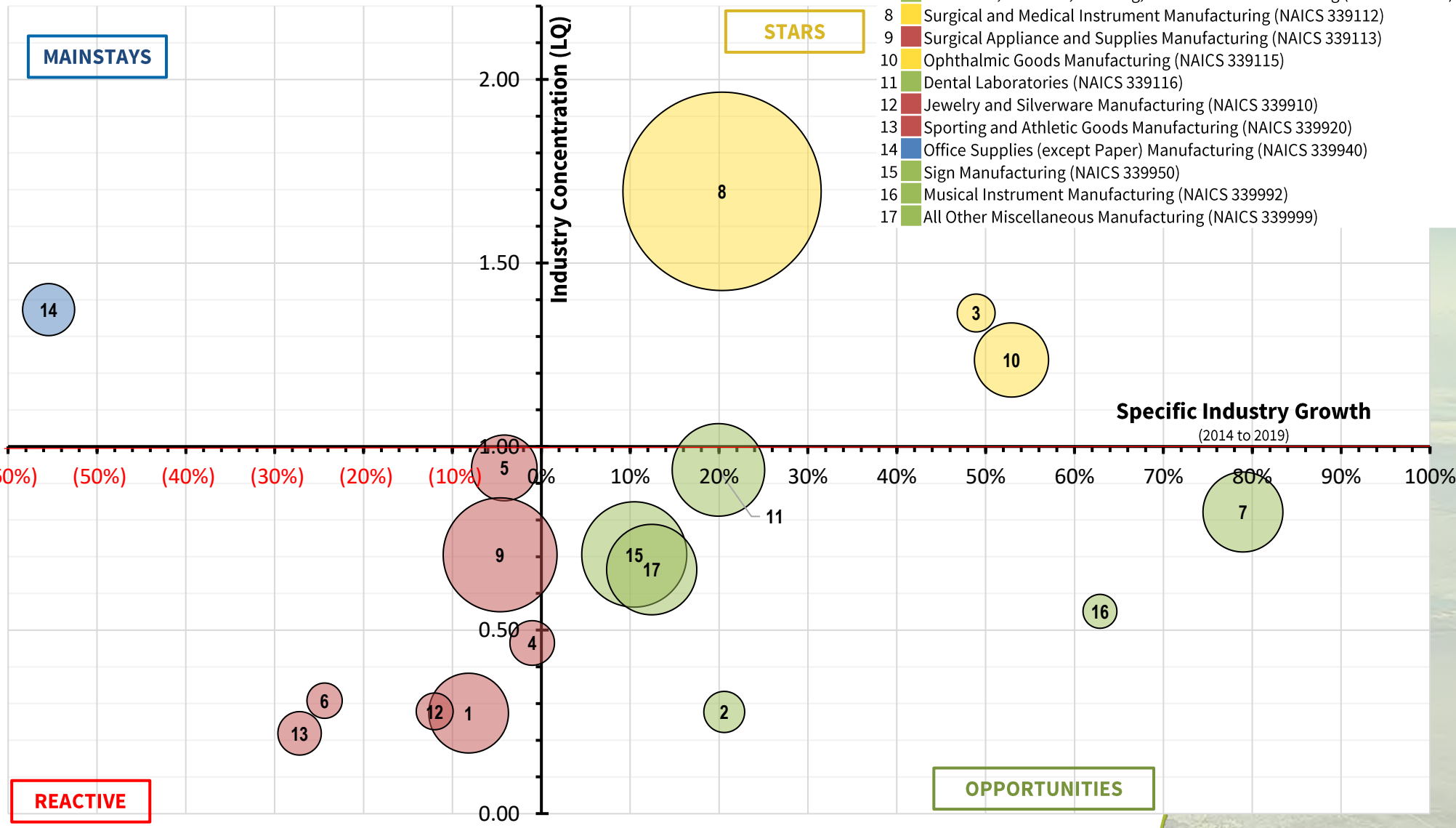
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Furniture & Miscellaneous Manufacturing

NAICS 337-339



1. Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)
2. Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)
3. Metal Household Furniture Manufacturing (NAICS 337124)
4. Institutional Furniture Manufacturing (NAICS 337127)
5. Custom Architectural Woodwork and Millwork Manufacturing (NAICS 337212)
6. Office Furniture (except Wood) Manufacturing (NAICS 337214)
7. Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)
8. Surgical and Medical Instrument Manufacturing (NAICS 339112)
9. Surgical Appliance and Supplies Manufacturing (NAICS 339113)
10. Ophthalmic Goods Manufacturing (NAICS 339115)
11. Dental Laboratories (NAICS 339116)
12. Jewelry and Silverware Manufacturing (NAICS 339910)
13. Sporting and Athletic Goods Manufacturing (NAICS 339920)
14. Office Supplies (except Paper) Manufacturing (NAICS 339940)
15. Sign Manufacturing (NAICS 339950)
16. Musical Instrument Manufacturing (NAICS 339992)
17. All Other Miscellaneous Manufacturing (NAICS 339999)

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 5,538

= 400 employees

Target Industry Analysis – Furniture & Miscellaneous Manufacturing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	16	303	6,839
Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)	<10	82	1,599
Metal Household Furniture Manufacturing (NAICS 337124)	0	70	182
Institutional Furniture Manufacturing (NAICS 337127)	0	97	963
Custom Architectural Woodwork and Millwork Manufacturing (NAICS 337212)	0	207	1,125
Office Furniture (except Wood) Manufacturing (NAICS 337214)	0	62	1,502
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	0	306	2,228
Surgical and Medical Instrument Manufacturing (NAICS 339112)	0	1,858	7,061
Surgical Appliance and Supplies Manufacturing (NAICS 339113)	<10	617	3,746
Ophthalmic Goods Manufacturing (NAICS 339115)	0	263	738
Dental Laboratories (NAICS 339116)	32	409	1,505
Jewelry and Silverware Manufacturing (NAICS 339910)	<10	66	416
Sporting and Athletic Goods Manufacturing (NAICS 339920)	<10	91	1,400
Office Supplies (except Paper) Manufacturing (NAICS 339940)	0	131	961
Sign Manufacturing (NAICS 339950)	<10	528	3,260
Musical Instrument Manufacturing (NAICS 339992)	0	57	848
All Other Miscellaneous Manufacturing (NAICS 339999)	<10	389	3,255

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Furniture & Miscellaneous Manufacturing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	0.46	0.27	1.30
Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)	0.32	0.28	1.13
Metal Household Furniture Manufacturing (NAICS 337124)	0.00	1.36	0.74
Institutional Furniture Manufacturing (NAICS 337127)	0.00	0.46	0.98
Custom Architectural Woodwork and Millwork Manufacturing (NAICS 337212)	0.00	0.94	1.08
Office Furniture (except Wood) Manufacturing (NAICS 337214)	0.00	0.31	1.58
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	0.00	0.82	1.26
Surgical and Medical Instrument Manufacturing (NAICS 339112)	0.00	1.70	1.36
Surgical Appliance and Supplies Manufacturing (NAICS 339113)	0.25	0.71	0.90
Ophthalmic Goods Manufacturing (NAICS 339115)	0.00	1.24	0.73
Dental Laboratories (NAICS 339116)	2.29	0.94	0.73
Jewelry and Silverware Manufacturing (NAICS 339910)	0.09	0.28	0.37
Sporting and Athletic Goods Manufacturing (NAICS 339920)	0.06	0.22	0.71
Office Supplies (except Paper) Manufacturing (NAICS 339940)	0.00	1.37	2.13
Sign Manufacturing (NAICS 339950)	0.26	0.71	0.92
Musical Instrument Manufacturing (NAICS 339992)	0.00	0.55	1.74
All Other Miscellaneous Manufacturing (NAICS 339999)	0.22	0.66	1.17

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Furniture & Miscellaneous Manufacturing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	$29,524	$35,482	$43,490	$42,743
Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)	Insf. Data	$61,108	$37,459	$40,172
Metal Household Furniture Manufacturing (NAICS 337124)	Insf. Data	$42,116	$53,364	$46,534
Institutional Furniture Manufacturing (NAICS 337127)	Insf. Data	$51,619	$46,472	$50,011
Custom Architectural Woodwork and Millwork Manufacturing (NAICS 337212)	Insf. Data	$50,071	$50,388	$54,747
Office Furniture (except Wood) Manufacturing (NAICS 337214)	Insf. Data	$48,307	$69,698	$62,856
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	Insf. Data	$48,056	$60,264	$49,566
Surgical and Medical Instrument Manufacturing (NAICS 339112)	Insf. Data	$94,611	$78,197	$91,428
Surgical Appliance and Supplies Manufacturing (NAICS 339113)	Insf. Data	$57,684	$62,106	$79,033
Ophthalmic Goods Manufacturing (NAICS 339115)	Insf. Data	$59,590	$48,447	$66,141
Dental Laboratories (NAICS 339116)	$36,263	$40,173	$43,282	$46,301
Jewelry and Silverware Manufacturing (NAICS 339910)	Insf. Data	$48,411	$46,302	$47,462
Sporting and Athletic Goods Manufacturing (NAICS 339920)	Insf. Data	$52,155	$49,261	$52,820
Office Supplies (except Paper) Manufacturing (NAICS 339940)	Insf. Data	$65,992	$42,509	$49,533
Sign Manufacturing (NAICS 339950)	Insf. Data	$42,340	$52,072	$48,415
Musical Instrument Manufacturing (NAICS 339992)	Insf. Data	$35,599	$63,223	$49,389
All Other Miscellaneous Manufacturing (NAICS 339999)	Insf. Data	$54,935	$61,285	$55,123

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Furniture & Miscellaneous Manufacturing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	Insf. Data	13%	(8%)	(12%)	9%	(7%)	12%	0%
Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)	Insf. Data	Insf. Data	21%	2%	15%	3%	(15%)	(7%)
Metal Household Furniture Manufacturing (NAICS 337124)	0%	0%	49%	26%	24%	13%	1%	3%
Institutional Furniture Manufacturing (NAICS 337127)	0%	0%	(1%)	(29%)	(9%)	(11%)	10%	5%
Custom Architectural Woodwork and Millwork Manufacturing (NAICS 337212)	(100%)	0%	(4%)	(8%)	11%	4%	30%	15%
Office Furniture (except Wood) Manufacturing (NAICS 337214)	0%	0%	(24%)	(8%)	9%	2%	8%	2%
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	0%	0%	79%	9%	(0%)	1%	(3%)	(3%)
Surgical and Medical Instrument Manufacturing (NAICS 339112)	0%	0%	20%	0%	4%	(2%)	10%	7%
Surgical Appliance and Supplies Manufacturing (NAICS 339113)	Insf. Data	Insf. Data	(5%)	(17%)	0%	(7%)	2%	3%
Ophthalmic Goods Manufacturing (NAICS 339115)	0%	0%	53%	14%	(15%)	(1%)	(5%)	(1%)
Dental Laboratories (NAICS 339116)	23%	3%	20%	2%	0%	(2%)	3%	1%
Jewelry and Silverware Manufacturing (NAICS 339910)	Insf. Data	Insf. Data	(12%)	(12%)	(18%)	(12%)	(14%)	(14%)
Sporting and Athletic Goods Manufacturing (NAICS 339920)	Insf. Data	Insf. Data	(27%)	(11%)	19%	4%	3%	(0%)
Office Supplies (except Paper) Manufacturing (NAICS 339940)	0%	0%	(55%)	(51%)	(42%)	(34%)	(11%)	(7%)
Sign Manufacturing (NAICS 339950)	Insf. Data	Insf. Data	10%	(1%)	12%	3%	11%	2%
Musical Instrument Manufacturing (NAICS 339992)	0%	0%	63%	18%	(7%)	(10%)	2%	0%
All Other Miscellaneous Manufacturing (NAICS 339999)	Insf. Data	Insf. Data	12%	8%	1%	5%	17%	8%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Transportation and Warehousing

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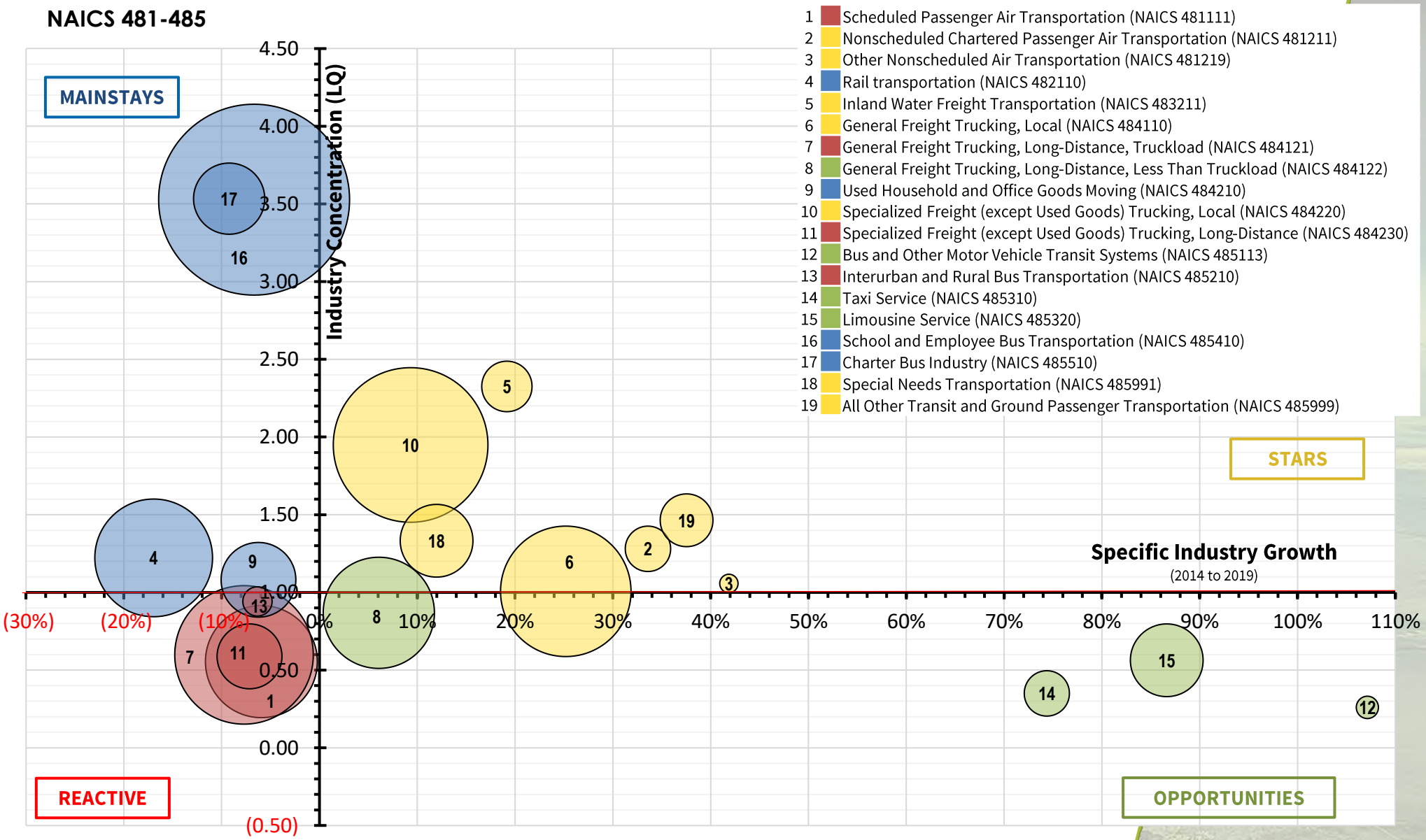
Target Industry Analysis – Air, Rail, Water, Truck & Transit Transportation

NAICS 481-485



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 28,442

= 2,000 employees

Target Industry Analysis – Air, Rail, Water, Truck & Transit Transportation

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Scheduled Passenger Air Transportation (NAICS 481111)	0	2,074	12,200
Nonscheduled Chartered Passenger Air Transportation (NAICS 481211)	0	350	706
Other Nonscheduled Air Transportation (NAICS 481219)	0	61	110
Rail transportation (NAICS 482110)	234	2,290	11,082
Inland Water Freight Transportation (NAICS 483211)	0	429	475
General Freight Trucking, Local (NAICS 484110)	268	2,809	15,743
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	200	3,162	23,642
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	20	2,047	15,365
Used Household and Office Goods Moving (NAICS 484210)	<10	932	3,007
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	633	3,941	13,587
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	0	702	3,904
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	0	87	217
Interurban and Rural Bus Transportation (NAICS 485210)	0	148	867
Taxi Service (NAICS 485310)	<10	347	2,585
Limousine Service (NAICS 485320)	<10	879	4,594
School and Employee Bus Transportation (NAICS 485410)	425	5,990	25,006
Charter Bus Industry (NAICS 485510)	12	846	2,133
Special Needs Transportation (NAICS 485991)	<10	879	3,799
All Other Transit and Ground Passenger Transportation (NAICS 485999)	<10	469	1,312

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Air, Rail, Water, Truck & Transit Transportation

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Scheduled Passenger Air Transportation (NAICS 481111)	0.00	0.55	0.69
Nonscheduled Chartered Passenger Air Transportation (NAICS 481211)	0.00	1.28	0.54
Other Nonscheduled Air Transportation (NAICS 481219)	0.00	1.06	0.40
Rail transportation (NAICS 482110)	3.96	1.22	1.25
Inland Water Freight Transportation (NAICS 483211)	0.00	2.33	0.54
General Freight Trucking, Local (NAICS 484110)	3.04	1.01	1.19
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	1.19	0.60	0.94
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	0.27	0.87	1.38
Used Household and Office Goods Moving (NAICS 484210)	0.19	1.08	0.74
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	9.90	1.95	1.42
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	0.00	0.59	0.69
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	0.00	0.26	0.14
Interurban and Rural Bus Transportation (NAICS 485210)	0.00	0.94	1.17
Taxi Service (NAICS 485310)	0.08	0.35	0.55
Limousine Service (NAICS 485320)	0.08	0.56	0.62
School and Employee Bus Transportation (NAICS 485410)	7.92	3.53	3.11
Charter Bus Industry (NAICS 485510)	1.64	3.53	1.88
Special Needs Transportation (NAICS 485991)	0.03	1.33	1.22
All Other Transit and Ground Passenger Transportation (NAICS 485999)	0.16	1.46	0.86

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Air, Rail, Water, Truck & Transit Transportation

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Scheduled Passenger Air Transportation (NAICS 481111)	Insf. Data	$84,992	$81,761	$89,026
Nonscheduled Chartered Passenger Air Transportation (NAICS 481211)	Insf. Data	$78,685	$84,606	$99,761
Other Nonscheduled Air Transportation (NAICS 481219)	Insf. Data	$102,223	$87,732	$82,952
Rail transportation (NAICS 482110)	$82,257	$82,201	$82,257	$90,929
Inland Water Freight Transportation (NAICS 483211)	Insf. Data	$67,957	$68,822	$83,616
General Freight Trucking, Local (NAICS 484110)	$51,646	$55,149	$55,145	$52,755
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	$58,041	$61,399	$59,310	$53,915
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	$66,326	$64,942	$62,882	$59,888
Used Household and Office Goods Moving (NAICS 484210)	Insf. Data	$45,001	$39,532	$40,648
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	$52,814	$56,105	$56,589	$54,865
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	Insf. Data	$53,634	$60,219	$61,056
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	Insf. Data	$42,777	$46,177	$50,978
Interurban and Rural Bus Transportation (NAICS 485210)	Insf. Data	$45,597	$43,009	$44,187
Taxi Service (NAICS 485310)	Insf. Data	$25,626	$33,118	$54,600
Limousine Service (NAICS 485320)	Insf. Data	$25,326	$26,943	$27,050
School and Employee Bus Transportation (NAICS 485410)	$19,550	$21,469	$20,620	$27,082
Charter Bus Industry (NAICS 485510)	$31,475	$33,477	$33,288	$37,394
Special Needs Transportation (NAICS 485991)	Insf. Data	$30,181	$29,446	$31,673
All Other Transit and Ground Passenger Transportation (NAICS 485999)	Insf. Data	$34,217	$32,172	$36,669

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Air, Rail, Water, Truck & Transit Transportation

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Scheduled Passenger Air Transportation (NAICS 481111)	0%	0%	(6%)	(32%)	5%	(2%)	13%	5%
Nonscheduled Chartered Passenger Air Transportation (NAICS 481211)	0%	0%	34%	3%	22%	3%	17%	5%
Other Nonscheduled Air Transportation (NAICS 481219)	0%	0%	42%	23%	24%	19%	45%	24%
Rail transportation (NAICS 482110)	(21%)	(3%)	(17%)	(5%)	(8%)	(0%)	(7%)	2%
Inland Water Freight Transportation (NAICS 483211)	0%	0%	19%	4%	24%	6%	(5%)	0%
General Freight Trucking, Local (NAICS 484110)	(6%)	(2%)	25%	9%	10%	7%	11%	6%
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	(17%)	(12%)	(8%)	(8%)	0%	(4%)	4%	2%
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	25%	0%	6%	(2%)	20%	6%	14%	8%
Used Household and Office Goods Moving (NAICS 484210)	Insf. Data	Insf. Data	(6%)	(5%)	1%	(1%)	6%	2%
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	160%	34%	9%	11%	(2%)	6%	3%	5%
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	(100%)	0%	(7%)	9%	11%	11%	7%	8%
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	0%	0%	107%	(2%)	(0%)	(6%)	10%	8%
Interurban and Rural Bus Transportation (NAICS 485210)	0%	0%	(6%)	1%	24%	10%	1%	1%
Taxi Service (NAICS 485310)	Insf. Data	Insf. Data	74%	31%	43%	16%	66%	20%
Limousine Service (NAICS 485320)	Insf. Data	Insf. Data	87%	21%	80%	22%	88%	23%
School and Employee Bus Transportation (NAICS 485410)	(7%)	(3%)	(7%)	(2%)	3%	2%	6%	4%
Charter Bus Industry (NAICS 485510)	(45%)	Insf. Data	(9%)	2%	(14%)	(3%)	(5%)	1%
Special Needs Transportation (NAICS 485991)	Insf. Data	Insf. Data	12%	16%	11%	15%	19%	17%
All Other Transit and Ground Passenger Transportation (NAICS 485999)	Insf. Data	Insf. Data	38%	20%	35%	17%	13%	17%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Support Activities for Transportation & Warehousing

NAICS 486-493

Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 18,530

= 1,300 employees

Target Industry Analysis – Support Activities for Transportation & Warehousing

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Pipeline Transportation of Natural Gas (NAICS 486210)	116	566	1,858
Pipeline Transportation of Refined Petroleum Products (NAICS 486910)	0	94	542
Scenic and Sightseeing Transportation, Land (NAICS 487110)	<10	57	529
Scenic and Sightseeing Transportation, Water (NAICS 487210)	0	151	339
Other Airport Operations (NAICS 488119)	0	496	2,947
Other Support Activities for Air Transportation (NAICS 488190)	36	492	1,173
Support Activities for Rail Transportation (NAICS 488210)	41	353	1,452
Navigational Services to Shipping (NAICS 488330)	0	264	412
Motor Vehicle Towing (NAICS 488410)	<10	544	2,596
Other Support Activities for Road Transportation (NAICS 488490)	<10	168	1,583
Freight Transportation Arrangement (NAICS 488510)	46	1,349	6,663
Packing and Crating (NAICS 488991)	0	133	829
All Other Support Activities for Transportation (NAICS 488999)	<10	103	448
Postal Service (NAICS 491110)	0	307	356
Couriers and Express Delivery Services (NAICS 492110)	97	6,323	32,371
Local Messengers and Local Delivery (NAICS 492210)	18	325	3,627
General Warehousing and Storage (NAICS 493110)	31	5,974	83,241
Refrigerated Warehousing and Storage (NAICS 493120)	0	235	3,519
Other Warehousing and Storage (NAICS 493190)	<10	597	2,264

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Support Activities for Transportation & Warehousing

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Pipeline Transportation of Natural Gas (NAICS 486210)	14.76	2.28	1.58
Pipeline Transportation of Refined Petroleum Products (NAICS 486910)	0.00	1.48	1.80
Scenic and Sightseeing Transportation, Land (NAICS 487110)	0.16	0.44	0.87
Scenic and Sightseeing Transportation, Water (NAICS 487210)	0.00	0.93	0.44
Other Airport Operations (NAICS 488119)	0.00	0.56	0.70
Other Support Activities for Air Transportation (NAICS 488190)	1.10	0.47	0.24
Support Activities for Rail Transportation (NAICS 488210)	4.23	1.15	1.00
Navigational Services to Shipping (NAICS 488330)	0.00	1.85	0.61
Motor Vehicle Towing (NAICS 488410)	0.26	0.81	0.81
Other Support Activities for Road Transportation (NAICS 488490)	0.65	0.48	0.95
Freight Transportation Arrangement (NAICS 488510)	0.66	0.62	0.64
Packing and Crating (NAICS 488991)	0.00	0.73	0.96
All Other Support Activities for Transportation (NAICS 488999)	1.75	0.83	0.76
Postal Service (NAICS 491110)	0.00	2.51	0.61
Couriers and Express Delivery Services (NAICS 492110)	0.52	1.08	1.17
Local Messengers and Local Delivery (NAICS 492210)	0.61	0.35	0.82
General Warehousing and Storage (NAICS 493110)	0.11	0.67	1.98
Refrigerated Warehousing and Storage (NAICS 493120)	0.00	0.43	1.36
Other Warehousing and Storage (NAICS 493190)	0.09	1.41	1.13

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Support Activities for Transportation & Warehousing

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Pipeline Transportation of Natural Gas (NAICS 486210)	$116,026	$140,211	$110,832	$137,330
Pipeline Transportation of Refined Petroleum Products (NAICS 486910)	Insf. Data	$120,076	$135,628	$125,533
Scenic and Sightseeing Transportation, Land (NAICS 487110)	Insf. Data	$17,614	$21,064	$34,404
Scenic and Sightseeing Transportation, Water (NAICS 487210)	Insf. Data	$24,834	$21,800	$34,443
Other Airport Operations (NAICS 488119)	Insf. Data	$28,390	$29,034	$32,613
Other Support Activities for Air Transportation (NAICS 488190)	$42,743	$48,419	$56,572	$64,564
Support Activities for Rail Transportation (NAICS 488210)	$61,853	$55,080	$56,855	$55,721
Navigational Services to Shipping (NAICS 488330)	Insf. Data	$70,425	$68,913	$80,544
Motor Vehicle Towing (NAICS 488410)	Insf. Data	$34,643	$37,843	$40,967
Other Support Activities for Road Transportation (NAICS 488490)	Insf. Data	$45,647	$54,375	$44,188
Freight Transportation Arrangement (NAICS 488510)	$45,415	$69,801	$63,480	$62,913
Packing and Crating (NAICS 488991)	Insf. Data	$37,972	$39,067	$41,733
All Other Support Activities for Transportation (NAICS 488999)	Insf. Data	$25,394	$35,130	$58,450
Postal Service (NAICS 491110)	Insf. Data	$48,058	$48,897	$36,822
Couriers and Express Delivery Services (NAICS 492110)	$44,891	$42,561	$39,862	$46,470
Local Messengers and Local Delivery (NAICS 492210)	$46,916	$34,701	$32,361	$34,787
General Warehousing and Storage (NAICS 493110)	$56,801	$53,018	$43,342	$42,286
Refrigerated Warehousing and Storage (NAICS 493120)	Insf. Data	$70,048	$49,655	$51,400
Other Warehousing and Storage (NAICS 493190)	Insf. Data	$53,091	$50,671	$54,763

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Support Activities for Transportation & Warehousing

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Pipeline Transportation of Natural Gas (NAICS 486210)	13%	8%	10%	(1%)	27%	3%	5%	(0%)
Pipeline Transportation of Refined Petroleum Products (NAICS 486910)	0%	0%	62%	(1%)	(16%)	(3%)	2%	14%
Scenic and Sightseeing Transportation, Land (NAICS 487110)	Insf. Data	Insf. Data	16%	(9%)	(16%)	4%	11%	13%
Scenic and Sightseeing Transportation, Water (NAICS 487210)	0%	0%	(17%)	(15%)	5%	(3%)	11%	7%
Other Airport Operations (NAICS 488119)	0%	0%	28%	4%	27%	9%	46%	14%
Other Support Activities for Air Transportation (NAICS 488190)	(20%)	22%	31%	15%	11%	11%	19%	9%
Support Activities for Rail Transportation (NAICS 488210)	(18%)	15%	86%	23%	3%	7%	12%	9%
Navigational Services to Shipping (NAICS 488330)	0%	0%	13%	(1%)	29%	5%	(15%)	(9%)
Motor Vehicle Towing (NAICS 488410)	Insf. Data	Insf. Data	1%	10%	18%	11%	20%	11%
Other Support Activities for Road Transportation (NAICS 488490)	Insf. Data	Insf. Data	(22%)	7%	33%	11%	8%	10%
Freight Transportation Arrangement (NAICS 488510)	(30%)	(2%)	36%	14%	28%	8%	21%	8%
Packing and Crating (NAICS 488991)	0%	0%	13%	11%	3%	(3%)	11%	2%
All Other Support Activities for Transportation (NAICS 488999)	Insf. Data	Insf. Data	(1%)	7%	4%	17%	21%	11%
Postal Service (NAICS 491110)	0%	0%	1235%	34%	210%	36%	69%	25%
Couriers and Express Delivery Services (NAICS 492110)	155%	25%	13%	(2%)	33%	7%	32%	7%
Local Messengers and Local Delivery (NAICS 492210)	Insf. Data	(22%)	12%	(3%)	87%	16%	63%	13%
General Warehousing and Storage (NAICS 493110)	(50%)	(23%)	10%	1%	39%	8%	66%	16%
Refrigerated Warehousing and Storage (NAICS 493120)	0%	0%	65%	6%	21%	4%	24%	8%
Other Warehousing and Storage (NAICS 493190)	Insf. Data	Insf. Data	48%	11%	16%	11%	13%	7%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Professional, Scientific, and Technical Services

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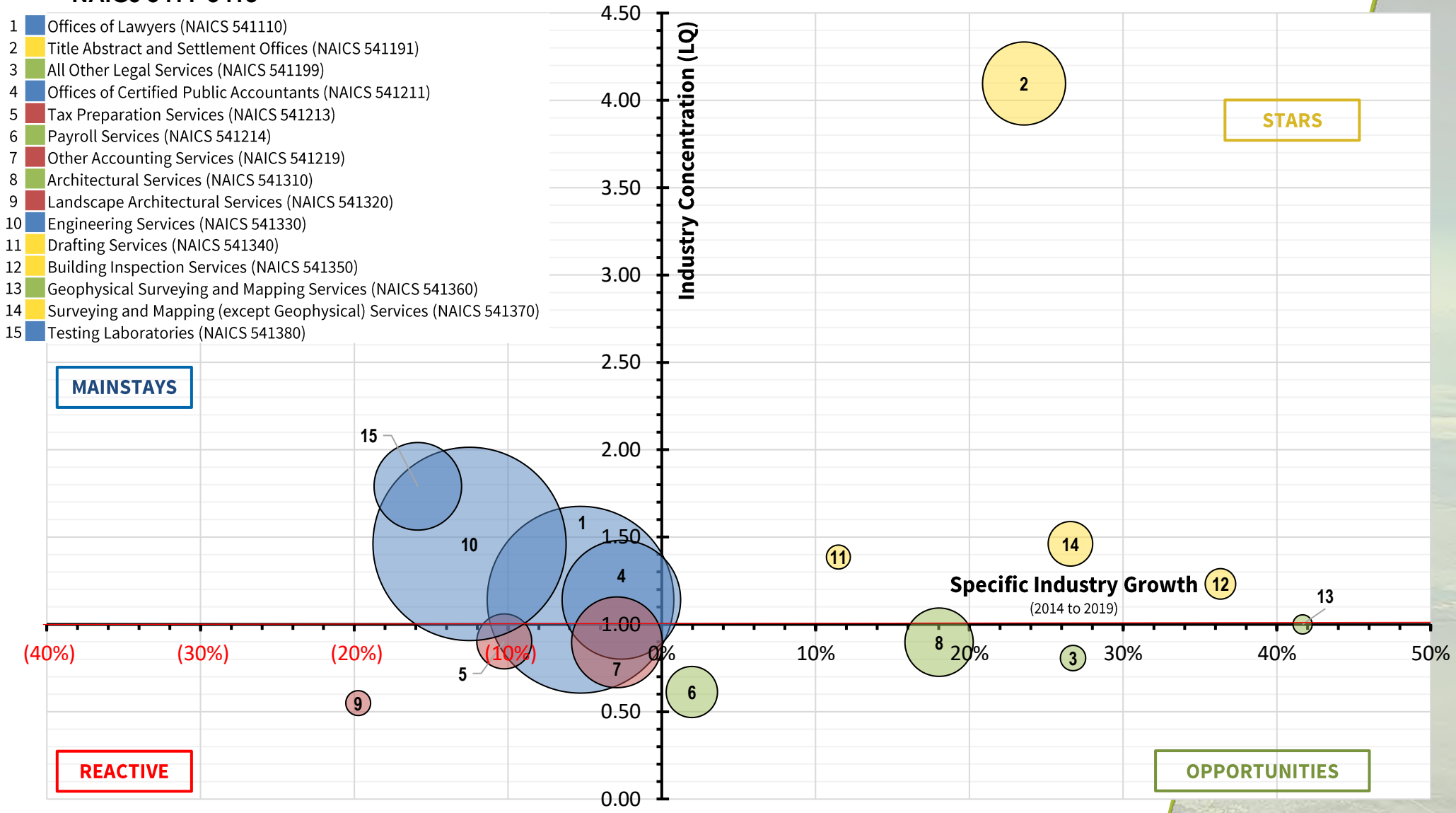
STRATEGY MATTERS

Target Industry Analysis – Professional and Engineering Services

NAICS 5411-5413



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 42,737

= 4,000 employees

Target Industry Analysis – Professional and Engineering Services

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Offices of Lawyers (NAICS 541110)	176	11,882	51,947
Title Abstract and Settlement Offices (NAICS 541191)	<10	2,383	4,865
All Other Legal Services (NAICS 541199)	18	234	1,858
Offices of Certified Public Accountants (NAICS 541211)	79	4,835	21,937
Tax Preparation Services (NAICS 541213)	66	1,057	5,291
Payroll Services (NAICS 541214)	<10	920	3,945
Other Accounting Services (NAICS 541219)	56	2,840	11,897
Architectural Services (NAICS 541310)	<10	1,613	7,068
Landscape Architectural Services (NAICS 541320)	<10	226	1,426
Engineering Services (NAICS 541330)	200	12,722	40,913
Drafting Services (NAICS 541340)	<10	209	592
Building Inspection Services (NAICS 541350)	<10	335	1,573
Geophysical Surveying and Mapping Services (NAICS 541360)	0	138	310
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	<10	699	1,488
Testing Laboratories (NAICS 541380)	10	2,644	9,258

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Professional and Engineering Services

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Offices of Lawyers (NAICS 541110)	0.53	1.14	1.05
Title Abstract and Settlement Offices (NAICS 541191)	0.44	4.10	1.76
All Other Legal Services (NAICS 541199)	1.95	0.81	1.35
Offices of Certified Public Accountants (NAICS 541211)	0.59	1.14	1.09
Tax Preparation Services (NAICS 541213)	1.77	0.90	0.95
Payroll Services (NAICS 541214)	0.01	0.61	0.55
Other Accounting Services (NAICS 541219)	0.56	0.90	0.79
Architectural Services (NAICS 541310)	0.10	0.90	0.83
Landscape Architectural Services (NAICS 541320)	0.53	0.55	0.73
Engineering Services (NAICS 541330)	0.73	1.46	0.99
Drafting Services (NAICS 541340)	0.37	1.39	0.83
Building Inspection Services (NAICS 541350)	0.41	1.23	1.22
Geophysical Surveying and Mapping Services (NAICS 541360)	0.00	1.00	0.47
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	0.42	1.46	0.65
Testing Laboratories (NAICS 541380)	0.22	1.79	1.32

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Professional and Engineering Services

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Offices of Lawyers (NAICS 541110)	$67,693	$104,071	$108,476	$106,784
Title Abstract and Settlement Offices (NAICS 541191)	Insf. Data	$62,368	$67,345	$68,444
All Other Legal Services (NAICS 541199)	$32,375	$56,761	$59,845	$81,003
Offices of Certified Public Accountants (NAICS 541211)	$42,015	$85,304	$92,461	$92,407
Tax Preparation Services (NAICS 541213)	$22,691	$39,676	$41,604	$45,593
Payroll Services (NAICS 541214)	Insf. Data	$92,109	$83,947	$88,212
Other Accounting Services (NAICS 541219)	$48,856	$52,328	$58,402	$61,821
Architectural Services (NAICS 541310)	Insf. Data	$76,613	$79,840	$87,312
Landscape Architectural Services (NAICS 541320)	Insf. Data	$54,821	$65,617	$60,729
Engineering Services (NAICS 541330)	$71,099	$89,966	$93,029	$99,415
Drafting Services (NAICS 541340)	Insf. Data	$49,113	$54,268	$59,760
Building Inspection Services (NAICS 541350)	Insf. Data	$58,252	$56,282	$57,489
Geophysical Surveying and Mapping Services (NAICS 541360)	Insf. Data	$77,292	$80,989	$86,682
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	Insf. Data	$68,400	$63,586	$62,281
Testing Laboratories (NAICS 541380)	$41,384	$78,860	$70,248	$79,737

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Professional and Engineering Services

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Offices of Lawyers (NAICS 541110)	(4%)	(3%)	(5%)	(2%)	(3%)	(2%)	1%	1%
Title Abstract and Settlement Offices (NAICS 541191)	Insf. Data	Insf. Data	24%	23%	18%	15%	6%	5%
All Other Legal Services (NAICS 541199)	Insf. Data	27%	27%	3%	6%	7%	24%	15%
Offices of Certified Public Accountants (NAICS 541211)	(2%)	(6%)	(3%)	(0%)	8%	4%	13%	6%
Tax Preparation Services (NAICS 541213)	(10%)	(10%)	(10%)	(13%)	(9%)	(5%)	(2%)	(2%)
Payroll Services (NAICS 541214)	Insf. Data	Insf. Data	2%	13%	12%	11%	(2%)	7%
Other Accounting Services (NAICS 541219)	47%	12%	(3%)	2%	3%	0%	7%	3%
Architectural Services (NAICS 541310)	Insf. Data	Insf. Data	18%	1%	18%	2%	15%	3%
Landscape Architectural Services (NAICS 541320)	Insf. Data	Insf. Data	(20%)	(11%)	(5%)	(6%)	3%	2%
Engineering Services (NAICS 541330)	(27%)	(8%)	(13%)	(3%)	3%	3%	10%	6%
Drafting Services (NAICS 541340)	Insf. Data	Insf. Data	11%	(1%)	(1%)	(4%)	4%	3%
Building Inspection Services (NAICS 541350)	Insf. Data	Insf. Data	36%	22%	20%	12%	25%	13%
Geophysical Surveying and Mapping Services (NAICS 541360)	Insf. Data	0%	42%	5%	(12%)	(1%)	(18%)	3%
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	Insf. Data	Insf. Data	27%	10%	(3%)	(1%)	17%	7%
Testing Laboratories (NAICS 541380)	Insf. Data	Insf. Data	(16%)	(4%)	2%	4%	4%	4%

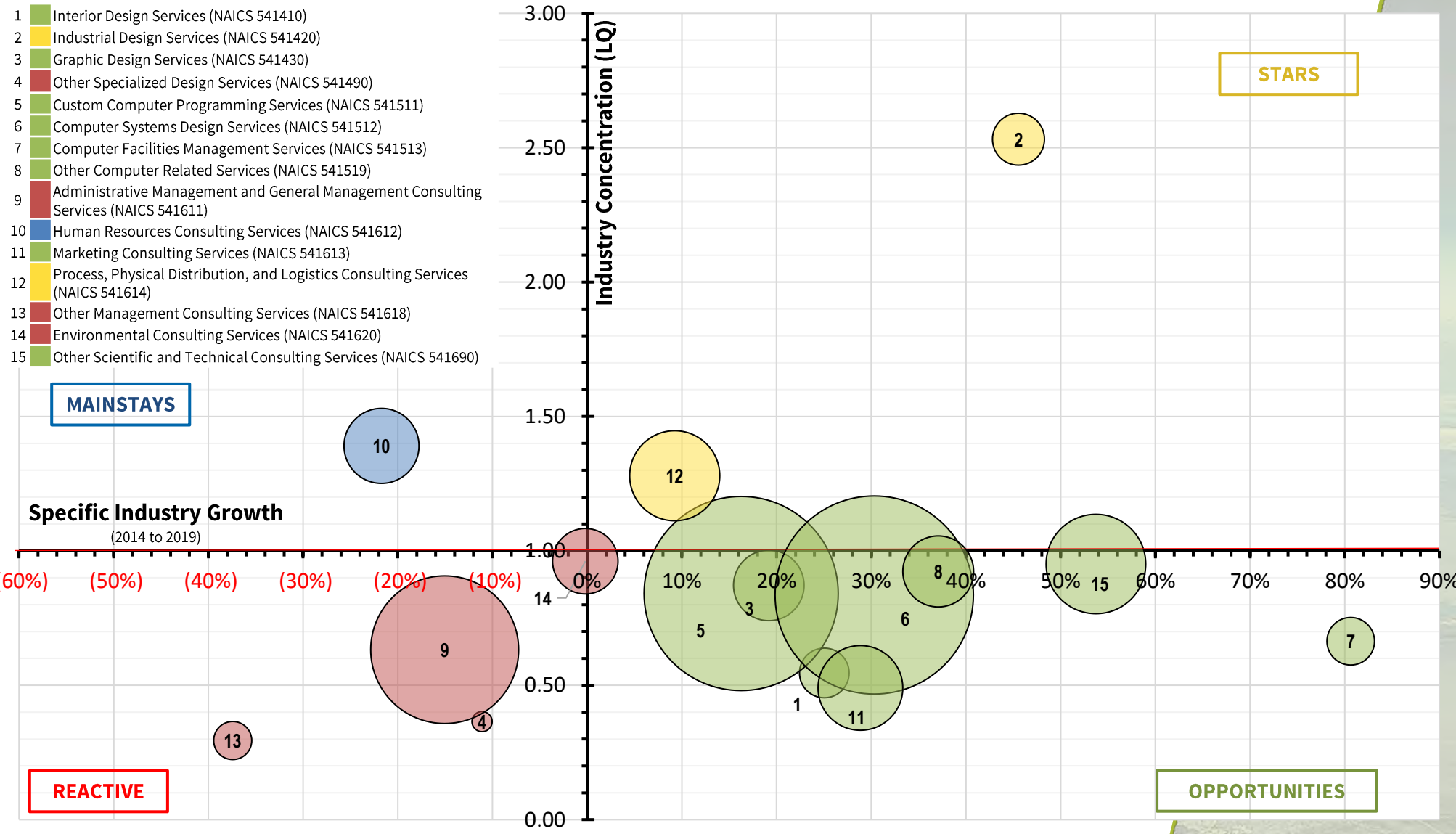
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

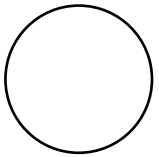
Target Industry Analysis – Design, Marketing, and Consulting Services

NAICS 5414-5416



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 30,203



Target Industry Analysis – Design, Marketing, and Consulting Services

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Interior Design Services (NAICS 541410)	17	497	2,627
Industrial Design Services (NAICS 541420)	<10	544	1,230
Graphic Design Services (NAICS 541430)	<10	992	4,272
Other Specialized Design Services (NAICS 541490)	<10	86	752
Custom Computer Programming Services (NAICS 541511)	113	7,384	33,516
Computer Systems Design Services (NAICS 541512)	23	7,689	37,610
Computer Facilities Management Services (NAICS 541513)	<10	456	1,968
Other Computer Related Services (NAICS 541519)	<10	1,003	5,063
Administrative Management and General Management Consulting Services (NAICS 541611)	31	4,293	26,190
Human Resources Consulting Services (NAICS 541612)	<10	1,117	5,794
Marketing Consulting Services (NAICS 541613)	31	1,427	11,024
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	<10	1,602	5,033
Other Management Consulting Services (NAICS 541618)	<10	297	2,313
Environmental Consulting Services (NAICS 541620)	<10	860	4,274
Other Scientific and Technical Consulting Services (NAICS 541690)	27	1,955	8,232

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Design, Marketing, and Consulting Services

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Interior Design Services (NAICS 541410)	0.58	0.55	0.61
Industrial Design Services (NAICS 541420)	0.12	2.53	1.20
Graphic Design Services (NAICS 541430)	0.14	0.87	0.79
Other Specialized Design Services (NAICS 541490)	0.10	0.36	0.67
Custom Computer Programming Services (NAICS 541511)	0.41	0.84	0.80
Computer Systems Design Services (NAICS 541512)	0.08	0.84	0.86
Computer Facilities Management Services (NAICS 541513)	0.13	0.66	0.60
Other Computer Related Services (NAICS 541519)	0.03	0.92	0.98
Administrative Management and General Management Consulting Services (NAICS 541611)	0.14	0.63	0.81
Human Resources Consulting Services (NAICS 541612)	0.11	1.39	1.52
Marketing Consulting Services (NAICS 541613)	0.34	0.49	0.80
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	0.17	1.28	0.84
Other Management Consulting Services (NAICS 541618)	0.10	0.29	0.48
Environmental Consulting Services (NAICS 541620)	0.30	0.96	1.00
Other Scientific and Technical Consulting Services (NAICS 541690)	0.42	0.95	0.84

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Design, Marketing, and Consulting Services

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Interior Design Services (NAICS 541410)	$28,897	$36,679	$41,431	$45,817
Industrial Design Services (NAICS 541420)	Insf. Data	$103,445	$77,435	$81,823
Graphic Design Services (NAICS 541430)	Insf. Data	$42,312	$42,603	$48,579
Other Specialized Design Services (NAICS 541490)	Insf. Data	$35,473	$54,902	$60,801
Custom Computer Programming Services (NAICS 541511)	$63,422	$90,151	$107,925	$125,237
Computer Systems Design Services (NAICS 541512)	$59,112	$95,157	$107,980	$113,394
Computer Facilities Management Services (NAICS 541513)	Insf. Data	$67,512	$83,696	$106,624
Other Computer Related Services (NAICS 541519)	Insf. Data	$82,875	$97,554	$113,086
Administrative Management and General Management Consulting Services (NAICS 541611)	$67,096	$91,087	$109,158	$105,613
Human Resources Consulting Services (NAICS 541612)	Insf. Data	$79,565	$102,328	$94,492
Marketing Consulting Services (NAICS 541613)	$80,003	$74,497	$86,600	$77,679
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	Insf. Data	$94,643	$91,229	$76,013
Other Management Consulting Services (NAICS 541618)	Insf. Data	$75,225	$83,249	$92,921
Environmental Consulting Services (NAICS 541620)	Insf. Data	$72,398	$74,619	$76,904
Other Scientific and Technical Consulting Services (NAICS 541690)	$46,334	$65,403	$88,749	$91,736

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Design, Marketing, and Consulting Services

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Interior Design Services (NAICS 541410)	Insf. Data	21%	25%	10%	23%	7%	23%	10%
Industrial Design Services (NAICS 541420)	Insf. Data	Insf. Data	46%	9%	5%	8%	26%	8%
Graphic Design Services (NAICS 541430)	Insf. Data	Insf. Data	19%	(1%)	10%	(0%)	5%	2%
Other Specialized Design Services (NAICS 541490)	Insf. Data	Insf. Data	(11%)	21%	(43%)	17%	19%	11%
Custom Computer Programming Services (NAICS 541511)	161%	27%	16%	11%	10%	11%	24%	14%
Computer Systems Design Services (NAICS 541512)	(47%)	(9%)	30%	9%	13%	9%	21%	14%
Computer Facilities Management Services (NAICS 541513)	Insf. Data	Insf. Data	81%	36%	44%	19%	33%	13%
Other Computer Related Services (NAICS 541519)	Insf. Data	Insf. Data	37%	17%	13%	4%	11%	9%
Administrative Management and General Management Consulting Services (NAICS 541611)	40%	7%	(15%)	(10%)	8%	6%	34%	16%
Human Resources Consulting Services (NAICS 541612)	Insf. Data	Insf. Data	(22%)	0%	9%	5%	6%	4%
Marketing Consulting Services (NAICS 541613)	Insf. Data	36%	29%	8%	21%	9%	33%	14%
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	Insf. Data	Insf. Data	9%	6%	(10%)	3%	27%	13%
Other Management Consulting Services (NAICS 541618)	Insf. Data	Insf. Data	(37%)	(15%)	(9%)	3%	16%	9%
Environmental Consulting Services (NAICS 541620)	Insf. Data	Insf. Data	(0%)	(6%)	6%	6%	8%	8%
Other Scientific and Technical Consulting Services (NAICS 541690)	(60%)	(2%)	54%	23%	24%	15%	(4%)	8%

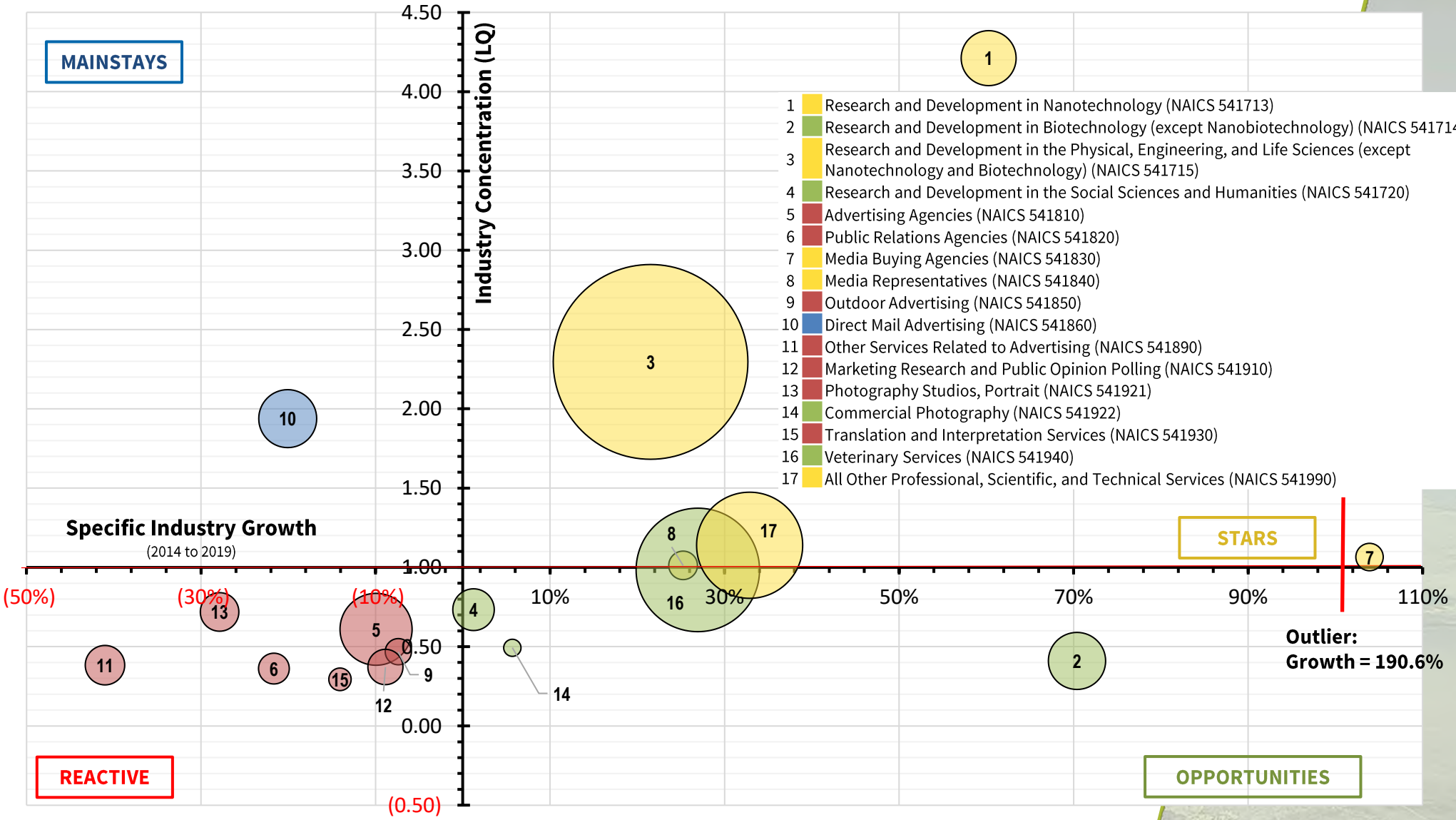
Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Research and Other Services

NAICS 5417-5419



Circle Size = Number of employees in Greater Region
Source: EMSI 2020 Q1 Dataset

Total Employees in Greater Region: 2,083

= 2,500 employees

Target Industry Analysis – Research and Other Services

Existing Industry Concentration Comparison: Employment	Core Region	Greater Region	Pennsylvania
Research and Development in Nanotechnology (NAICS 541713)	0	693	1,056
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	0	743	17,073
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	0	8,444	20,915
Research and Development in the Social Sciences and Humanities (NAICS 541720)	0	400	1,584
Advertising Agencies (NAICS 541810)	<10	1,174	7,182
Public Relations Agencies (NAICS 541820)	13	222	1,728
Media Buying Agencies (NAICS 541830)	0	164	843
Media Representatives (NAICS 541840)	0	191	699
Outdoor Advertising (NAICS 541850)	0	163	1,295
Direct Mail Advertising (NAICS 541860)	0	761	3,655
Other Services Related to Advertising (NAICS 541890)	<10	360	3,806
Marketing Research and Public Opinion Polling (NAICS 541910)	<10	288	4,273
Photography Studios, Portrait (NAICS 541921)	10	346	2,214
Commercial Photography (NAICS 541922)	<10	73	487
Translation and Interpretation Services (NAICS 541930)	0	121	988
Veterinary Services (NAICS 541940)	105	3,414	15,683
All Other Professional, Scientific, and Technical Services (NAICS 541990)	29	2,527	13,361

Source: EMSI 2020 Q1 Dataset

Target Industry Analysis – Research and Other Services

Existing Industry Concentration Comparison: Location Quotient	Core Region	Greater Region	Pennsylvania
Research and Development in Nanotechnology (NAICS 541713)	0.00	4.21	1.35
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	0.00	0.41	1.98
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	0.00	2.30	1.20
Research and Development in the Social Sciences and Humanities (NAICS 541720)	0.00	0.73	0.61
Advertising Agencies (NAICS 541810)	0.04	0.61	0.78
Public Relations Agencies (NAICS 541820)	0.65	0.36	0.59
Media Buying Agencies (NAICS 541830)	0.00	1.06	1.15
Media Representatives (NAICS 541840)	0.00	1.01	0.78
Outdoor Advertising (NAICS 541850)	0.00	0.47	0.78
Direct Mail Advertising (NAICS 541860)	0.00	1.94	1.96
Other Services Related to Advertising (NAICS 541890)	0.09	0.38	0.85
Marketing Research and Public Opinion Polling (NAICS 541910)	0.12	0.37	1.16
Photography Studios, Portrait (NAICS 541921)	0.66	0.72	0.97
Commercial Photography (NAICS 541922)	0.24	0.49	0.69
Translation and Interpretation Services (NAICS 541930)	0.00	0.29	0.51
Veterinary Services (NAICS 541940)	0.95	0.98	0.95
All Other Professional, Scientific, and Technical Services (NAICS 541990)	0.41	1.14	1.27

Source: EMSI 2020 Q1 Dataset

Region significantly concentrated (≥ 1.2)

Target Industry Analysis – Research and Other Services

Existing Industry Comparison: Wages, Salaries, & Proprietor Earnings	Core Region	Greater Region	Pennsylvania	United States
Research and Development in Nanotechnology (NAICS 541713)	Insf. Data	$163,925	$156,879	$122,271
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	Insf. Data	$106,509	$168,245	$179,318
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	Insf. Data	$120,449	$132,777	$130,228
Research and Development in the Social Sciences and Humanities (NAICS 541720)	Insf. Data	$99,161	$87,272	$78,406
Advertising Agencies (NAICS 541810)	Insf. Data	$80,164	$85,628	$100,179
Public Relations Agencies (NAICS 541820)	$55,630	$79,076	$91,272	$102,906
Media Buying Agencies (NAICS 541830)	Insf. Data	$54,837	$90,667	$106,287
Media Representatives (NAICS 541840)	Insf. Data	$88,601	$105,503	$99,591
Outdoor Advertising (NAICS 541850)	Insf. Data	$66,046	$71,363	$64,791
Direct Mail Advertising (NAICS 541860)	Insf. Data	$48,160	$59,956	$61,898
Other Services Related to Advertising (NAICS 541890)	Insf. Data	$50,858	$36,081	$41,423
Marketing Research and Public Opinion Polling (NAICS 541910)	Insf. Data	$53,488	$99,157	$92,473
Photography Studios, Portrait (NAICS 541921)	$24,182	$29,904	$30,983	$29,580
Commercial Photography (NAICS 541922)	Insf. Data	$34,072	$53,932	$45,416
Translation and Interpretation Services (NAICS 541930)	Insf. Data	$44,330	$56,481	$45,259
Veterinary Services (NAICS 541940)	$29,817	$43,286	$44,920	$43,489
All Other Professional, Scientific, and Technical Services (NAICS 541990)	$33,266	$66,755	$76,787	$65,744

Source: EMSI 2020 Q1 Dataset

Wages lower than other regions

Wages higher than other regions

Target Industry Analysis – Research and Other Services

Existing Industry Growth Comparison: 5-Year Past Growth (2014-2019) & 5-Year Projected Growth (2019-2024)	Core Region Past Growth	Core Region Projected Growth	Greater Region Past Growth	Greater Region Projected Growth	Pennsylvania Past Growth	Pennsylvania Projected Growth	U.S. Past Growth	U.S. Projected Growth
Research and Development in Nanotechnology (NAICS 541713)	Insf. Data	0%	60%	25%	65%	15%	(16%)	15%
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	Insf. Data	0%	70%	17%	75%	14%	47%	16%
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	Insf. Data	0%	22%	13%	27%	12%	6%	5%
Research and Development in the Social Sciences and Humanities (NAICS 541720)	0%	0%	1%	4%	9%	3%	6%	5%
Advertising Agencies (NAICS 541810)	Insf. Data	Insf. Data	(10%)	(3%)	12%	3%	7%	3%
Public Relations Agencies (NAICS 541820)	21%	3%	(22%)	(17%)	11%	6%	7%	4%
Media Buying Agencies (NAICS 541830)	0%	0%	191%	30%	40%	14%	15%	12%
Media Representatives (NAICS 541840)	0%	0%	25%	23%	(8%)	2%	(22%)	(8%)
Outdoor Advertising (NAICS 541850)	0%	0%	(7%)	(11%)	(1%)	0%	2%	3%
Direct Mail Advertising (NAICS 541860)	0%	0%	(20%)	(17%)	(17%)	(12%)	(9%)	(8%)
Other Services Related to Advertising (NAICS 541890)	Insf. Data	Insf. Data	(41%)	(32%)	9%	5%	4%	6%
Marketing Research and Public Opinion Polling (NAICS 541910)	Insf. Data	Insf. Data	(9%)	(14%)	(8%)	(2%)	(13%)	(4%)
Photography Studios, Portrait (NAICS 541921)	Insf. Data	Insf. Data	(28%)	(16%)	(13%)	(17%)	(6%)	(14%)
Commercial Photography (NAICS 541922)	Insf. Data	Insf. Data	6%	(3%)	7%	(2%)	19%	(1%)
Translation and Interpretation Services (NAICS 541930)	0%	0%	(14%)	1%	29%	18%	41%	21%
Veterinary Services (NAICS 541940)	18%	17%	27%	13%	18%	10%	22%	11%
All Other Professional, Scientific, and Technical Services (NAICS 541990)	(43%)	21%	33%	18%	36%	18%	24%	15%

Source: EMSI 2020 Q1 Dataset

Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Screening

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Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

The following section narrows down the target industries by looking at chart quadrant (current concentration and past five-year growth in the region), projected growth in the Greater Region, and projected U.S. growth. Industries from the previous section are included in this screening if they are a "star" or "opportunity" on the regional bubble chart.

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Mining, Quarrying, & Oil and Gas Extraction				
Dimension Stone Mining and Quarrying (NAICS 212311)	Star	33%	6%	**No.** While this is a strong historic industry in the region and it should continue to be supported, but not a focus of outbound recruitment.
Construction Sand and Gravel Mining (NAICS 212321)	Star	0%	6%	
Support Activities for Oil and Gas Operations (NAICS 213112)	Star	36%	15%	
Manufacturing: Food & Beverage Processing				
Confectionery Manufacturing from Purchased Chocolate (NAICS 311352)	Star	10%	1%	**Yes. Food and Beverage Processing.** While Fayette County employs very few people in this industry, a majority of these subsectors have seen very positive growth in the region. Success in this industry would be based on water/sewer capacity of the county and available sites.
Frozen Specialty Food Manufacturing (NAICS 311412)	Opportunity	27%	1%	
Cheese Manufacturing (NAICS 311513)	Opportunity	21%	9%	
Commercial Bakeries (NAICS 311812)	Opportunity	(5%)	1%	
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour (NAICS 311824)	Star	17%	1%	
Coffee and Tea Manufacturing (NAICS 311920)	Opportunity	6%	14%	
Perishable Prepared Food Manufacturing (NAICS 311991)	Opportunity	(10%)	12%	
Soft Drink Manufacturing (NAICS 312111)	Opportunity	4%	(4%)	
Bottled Water Manufacturing (NAICS 312112)	Star	7%	7%	
Ice Manufacturing (NAICS 312113)	Star	26%	6%	
Breweries (NAICS 312120)	Opportunity	12%	22%	
Wineries (NAICS 312130)	Opportunity	16%	9%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Textiles				
Textile Bag and Canvas Mills (NAICS 314910)	Star	15%	1%	**No.** While these industries have seen growth in the region, that national projected growth is not positive. Focus should be on support existing businesses in this industry, not recruitment.
All Other Miscellaneous Textile Product Mills (NAICS 314999)	Star	(1%)	(0%)	
Apparel Accessories and Other Apparel Manufacturing (NAICS 315990)	Star	16%	(1%)	
Footwear Manufacturing (NAICS 316210)	Opportunity	21%	(2%)	
Manufacturing: Wood Products				
Truss Manufacturing (NAICS 321214)	Opportunity	(20%)	7%	**No.** While this is a statewide target industry, the region has only seen strong positive growth in one subsector. And at a national level, the industry is not projected much growth.
Wood Container and Pallet Manufacturing (NAICS 321920)	Opportunity	(25%)	(2%)	
Prefabricated Wood Building Manufacturing (NAICS 321992)	Opportunity	2%	6%	
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	Star	1%	(1%)	
Books Printing (NAICS 323117)	Opportunity	42%	(7%)	
Manufacturing: Chemical Products				
Asphalt Paving Mixture and Block Manufacturing (NAICS 324121)	Opportunity	(14%)	9%	**Yes. Plastics.** While Fayette County employs very few people in this industry, it is a regional target industry and two subsectors have seen very positive growth in the region. Success in this industry would be based on water/sewer capacity of the county.
Petroleum Lubricating Oil and Grease Manufacturing (NAICS 324191)	Star	(0%)	6%	
Plastics Material and Resin Manufacturing (NAICS 325211)	Star	(27%)	(1%)	
Synthetic Rubber Manufacturing (NAICS 325212)	Star	34%	1%	
Polish and Other Sanitation Good Manufacturing (NAICS 325612)	Star	0%	5%	
Toilet Preparation Manufacturing (NAICS 325620)	Opportunity	37%	4%	
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	Star	(12%)	4%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Plastics				
Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130)	Star	14%	9%	**Yes. Plastics.** While Fayette County employs very few people in this industry, it is a regional target industry and two subsectors have seen very positive growth in the region. Success in this industry would be based on water/sewer capacity of the county.
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	Star	(3%)	5%	
All Other Plastics Product Manufacturing (NAICS 326199)	Opportunity	0%	(1%)	
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	Opportunity	7%	(1%)	
Manufacturing: Stone Products				
Glass Product Manufacturing Made of Purchased Glass (NAICS 327215)	Star	(6%)	3%	**No.** Fayette County has a high concentration of several of the subsectors in this industry; however, none of them appeared as stars or opportunities at the regional level. This indicates that a focus should be on retention and growth of existing companies rather than recruitment.
Cement Manufacturing (NAICS 327310)	Star	14%	(2%)	
Concrete Pipe Manufacturing (NAICS 327332)	Star	34%	2%	
Other Concrete Product Manufacturing (NAICS 327390)	Star	(9%)	0%	
Gypsum Product Manufacturing (NAICS 327420)	Star	4%	2%	
Cut Stone and Stone Product Manufacturing (NAICS 327991)	Opportunity	2%	7%	
All Other Miscellaneous Nonmetallic Mineral Product Manufacturing (NAICS 327999)	Opportunity	(24%)	7%	
Manufacturing: Primary Metals				
Secondary Smelting and Alloying of Aluminum (NAICS 331314)	Star	8%	7%	**Yes. Metal Product Manufacturing.** This is a regional target industry, but there is currently not a lot of it in Fayette County.
Other Aluminum Rolling, Drawing, and Extruding (NAICS 331318)	Opportunity	(9%)	(1%)	
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491)	Star	4%	5%	
Iron Foundries (NAICS 331511)	Star	6%	(7%)	
Aluminum Foundries (except Die-Casting) (NAICS 331524)	Star	(1%)	(0%)	
Other Nonferrous Metal Foundries (except Die-Casting) (NAICS 331529)	Star	(6%)	3%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Fabricated Metal Products				
Powder Metallurgy Part Manufacturing (NAICS 332117)	Star	24%	4%	**Yes. Metal Product Manufacturing.** This is a regional target industry, but there is currently not a lot of it in Fayette County. There could be opportunities in some of the higher growth industries.
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	Star	15%	(2%)	
Saw Blade and Handtool Manufacturing (NAICS 332216)	Opportunity	(16%)	(5%)	
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	Star	7%	7%	
Metal Window and Door Manufacturing (NAICS 332321)	Star	(15%)	3%	
Sheet Metal Work Manufacturing (NAICS 332322)	Opportunity	(4%)	4%	
Ornamental and Architectural Metal Work Manufacturing (NAICS 332323)	Star	(0%)	7%	
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	Star	5%	9%	
Spring Manufacturing (NAICS 332613)	Star	(3%)	4%	
Metal Heat Treating (NAICS 332811)	Opportunity	(1%)	3%	
Industrial Valve Manufacturing (NAICS 332911)	Opportunity	16%	2%	
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	Opportunity	20%	7%	
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	Opportunity	10%	3%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Machine & Equipment				
Farm Machinery and Equipment Manufacturing (NAICS 333111)	Opportunity	10%	(1%)	**Yes –Transportation and Machinery Equipment Manufacturing.** Fayette County already has some industry in motor vehicle parts manufacturing and boat building. This is also a regional target industry, so is complementary in that way.
Construction Machinery Manufacturing (NAICS 333120)	Opportunity	33%	5%	
Printing Machinery and Equipment Manufacturing (NAICS 333244)	Star	13%	(8%)	
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	Star	(1%)	6%	
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	Opportunity	(1%)	1%	
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	Star	15%	3%	
Measuring, Dispensing, and Other Pumping Equipment Manufacturing (NAICS 333914)	Star	31%	(2%)	
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	Opportunity	(2%)	4%	
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924)	Star	19%	8%	
Welding and Soldering Equipment Manufacturing (NAICS 333992)	Star	10%	2%	
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	Star	10%	1%	
Manufacturing: Electronics & Instruments				
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing (NAICS 334220)	Opportunity	18%	(13%)	**Yes – Electronic Component and Equipment Manufacturing.** This is a regional target industry and Fayette County has a small cluster of related businesses. Focus should be on those that show growth on a national level and those with opportunities for higher skilled jobs to help continue to diversify the economy.
Other Communications Equipment Manufacturing (NAICS 334290)	Star	(2%)	(7%)	
Semiconductor and Related Device Manufacturing (NAICS 334413)	Opportunity	15%	(5%)	
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	Star	13%	6%	
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	Star	12%	4%	
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	Opportunity	35%	(3%)	
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	Star	12%	0%	
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	Star	2%	1%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Electronic Equipment				
Relay and Industrial Control Manufacturing (NAICS 335314)	Star	7%	(1%)	**Yes – Electronic Component and Equipment Manufacturing.** This is a regional target industry and Fayette County has a small cluster of related businesses. Focus should be on those that show growth on a national level and those with opportunities for higher skilled jobs to help continue to diversify the economy.
Other Communication and Energy Wire Manufacturing (NAICS 335929)	Opportunity	19%	2%	
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	Opportunity	22%	1%	
All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	Opportunity	34%	5%	
Manufacturing: Transportation Equipment				
Motor Vehicle Body Manufacturing (NAICS 336211)	Opportunity	(8%)	3%	**Yes –Transportation and Machinery Equipment Manufacturing.** Fayette County already has some industry in motor vehicle parts manufacturing and boat building. This is also a regional target industry, so is complementary in that way.
Travel Trailer and Camper Manufacturing (NAICS 336214)	Opportunity	26%	8%	
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	Opportunity	23%	1%	
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	Opportunity	12%	5%	
Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350)	Opportunity	49%	6%	
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	Opportunity	33%	5%	
Boat Building (NAICS 336612)	Opportunity	18%	8%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Manufacturing: Furniture & Miscellaneous				
Nonupholstered Wood Household Furniture Manufacturing (NAICS 337122)	Opportunity	2%	(7%)	**No.** Most of these industries are miscellaneous and show low projected growth at a national level.
Metal Household Furniture Manufacturing (NAICS 337124)	Star	26%	3%	
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	Opportunity	9%	(3%)	
Surgical and Medical Instrument Manufacturing (NAICS 339112)	Star	0%	7%	
Ophthalmic Goods Manufacturing (NAICS 339115)	Star	14%	(1%)	
Dental Laboratories (NAICS 339116)	Opportunity	2%	1%	
Sign Manufacturing (NAICS 339950)	Opportunity	(1%)	2%	
Musical Instrument Manufacturing (NAICS 339992)	Opportunity	18%	0%	
All Other Miscellaneous Manufacturing (NAICS 339999)	Opportunity	8%	8%	
Transportation: Air, Rail, Water, Truck & Transit				
Nonscheduled Chartered Passenger Air Transportation (NAICS 481211)	Star	3%	5%	**Yes – Transportation and Distribution.** This should be focused on freight trucking and warehousing to support existing and target industries. This was noted as an opportunity among stakeholders due to the region's access to large regional metro areas.
Other Nonscheduled Air Transportation (NAICS 481219)	Star	23%	24%	
Inland Water Freight Transportation (NAICS 483211)	Star	4%	0%	
General Freight Trucking, Local (NAICS 484110)	Star	9%	6%	
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	Opportunity	(2%)	8%	
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	Star	(5%)	2%	
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	Opportunity	(2%)	8%	**No.** These transportation industries are focused on the general public, not freight. These industries will likely follow growth.
Taxi Service (NAICS 485310)	Opportunity	31%	20%	
Limousine Service (NAICS 485320)	Opportunity	21%	23%	
Special Needs Transportation (NAICS 485991)	Star	16%	17%	
All Other Transit and Ground Passenger Transportation (NAICS 485999)	Star	20%	17%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Transportation Support Activities & Warehousing				
Pipeline Transportation of Natural Gas (NAICS 486210)	Star	(1%)	(0%)	**No.** These transportation industries are focused on the general public, not freight and/or are projected low growth. These industries will likely follow growth.
Pipeline Transportation of Refined Petroleum Products (NAICS 486910)	Star	(1%)	14%	
Scenic and Sightseeing Transportation, Land (NAICS 487110)	Opportunity	(9%)	13%	
Other Airport Operations (NAICS 488119)	Opportunity	4%	14%	
Other Support Activities for Air Transportation (NAICS 488190)	Opportunity	15%	9%	
Support Activities for Rail Transportation (NAICS 488210)	Star	23%	9%	
Navigational Services to Shipping (NAICS 488330)	Star	(1%)	(9%)	
Motor Vehicle Towing (NAICS 488410)	Opportunity	10%	11%	
Freight Transportation Arrangement (NAICS 488510)	Opportunity	14%	8%	
Packing and Crating (NAICS 488991)	Opportunity	11%	2%	
Couriers and Express Delivery Services (NAICS 492110)	Star	(2%)	7%	
Local Messengers and Local Delivery (NAICS 492210)	Opportunity	(3%)	13%	
General Warehousing and Storage (NAICS 493110)	Opportunity	1%	16%	**Yes – Transportation and Distribution.** This should be focused on freight trucking and warehousing to support existing and target industries. This was noted as an opportunity among stakeholders due to the region's access to large regional metro areas.
Refrigerated Warehousing and Storage (NAICS 493120)	Opportunity	6%	8%	
Other Warehousing and Storage (NAICS 493190)	Star	11%	7%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Professional, Scientific and Technical Services: Professional and Engineering Services				
Title Abstract and Settlement Offices (NAICS 541191)	Star	23%	5%	**No.** A majority of these industries tend to follow the economy and will grow as other target industries grow.
All Other Legal Services (NAICS 541199)	Opportunity	3%	15%	
Payroll Services (NAICS 541214)	Opportunity	13%	7%	
Architectural Services (NAICS 541310)	Opportunity	1%	3%	
Drafting Services (NAICS 541340)	Star	(1%)	3%	
Building Inspection Services (NAICS 541350)	Star	22%	13%	
Geophysical Surveying and Mapping Services (NAICS 541360)	Opportunity	5%	3%	
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	Star	10%	7%	
Professional, Scientific and Technical Services: Design, Marketing & Consulting Services				
Interior Design Services (NAICS 541410)	Opportunity	10%	10%	**No.** A majority of these industries tend to follow the economy and will grow as other target industries grow.
Industrial Design Services (NAICS 541420)	Star	9%	8%	
Graphic Design Services (NAICS 541430)	Opportunity	(1%)	2%	
Marketing Consulting Services (NAICS 541613)	Opportunity	8%	14%	
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	Star	6%	13%	
Other Scientific and Technical Consulting Services (NAICS 541690)	Opportunity	23%	8%	
Custom Computer Programming Services (NAICS 541511)	Opportunity	11%	14%	**Yes, aspirational – Information Technology.** This industry offers opportunities for economic diversification in the region and with the access to regional educational institutions, there is an opportunity for Fayette County to capture some of that talent.
Computer Systems Design Services (NAICS 541512)	Opportunity	9%	14%	
Computer Facilities Management Services (NAICS 541513)	Opportunity	36%	13%	
Other Computer Related Services (NAICS 541519)	Opportunity	17%	9%	

Target Industry Screening

TARGET INDUSTRY SCREENING – STARS AND OPPORTUNITIES

Industry	Chart Quadrant	Greater Region Projected Growth	U.S. Projected Growth	Include as a target industry? Comments
Professional, Scientific and Technical Services: Research and Other Services				
Research and Development in Nanotechnology (NAICS 541713)	Star	25%	15%	**Yes, aspirational – Research and Development.** These have been high growth industries in the region and are projected to continue to grow in the region and nationally. Focus should be on recruiting the research and development functions of existing companies and industries to the region.
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	Star	17%	16%	
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	Star	13%	5%	
Research and Development in the Social Sciences and Humanities (NAICS 541720)	Star	4%	5%	
Media Buying Agencies (NAICS 541830)	Opportunity	30%	12%	**No.** A majority of these industries tend to follow the economy and will grow as other target industries grow.
Media Representatives (NAICS 541840)	Star	23%	(8%)	
Commercial Photography (NAICS 541922)	Opportunity	(3%)	(1%)	
Veterinary Services (NAICS 541940)	Opportunity	13%	11%	
All Other Professional, Scientific, and Technical Services (NAICS 541990)	Opportunity	18%	15%	

Target Industry Screening

RECOMMENDED TARGET INDUSTRIES

Based on the analysis in this section, we recommend the following industries as targets for the region. Each target industry has a set of key competitive advantages of the region. Positioning for each target industry will be added to the following section of this report.

Target Industry	Subsectors of Focus	Comments
Transportation and Machinery Equipment Manufacturing	• Construction Machinery Manufacturing (NAICS 333120) • Mechanical Power Transmission Equipment Manufacturing (NAICS 333613) • Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519) • Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing (NAICS 333924) • Travel Trailer and Camper Manufacturing (NAICS 336214) • Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320) • Motor Vehicle Transmission and Power Train Parts Manufacturing (NAICS 336350) • Other Motor Vehicle Parts Manufacturing (NAICS 336390) • Boat Building (NAICS 336612)	Fayette County already has some industry in motor vehicle parts manufacturing and boat building. This is also a regional target industry, so is complementary in that way.
Electronic Component and Equipment Manufacturing	• Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418) • Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510) • Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511) • Other Communication and Energy Wire Manufacturing (NAICS 335929) • All Other Miscellaneous Electrical Equipment and Component Manufacturing (NAICS 335999)	This is a regional target industry and Fayette County has a small cluster of related businesses. Focus should be on those that show growth on a national level and those with opportunities for higher skilled jobs to help continue to diversify the economy.
Transportation and Distribution	• General Freight Trucking, Local (NAICS 484110) • General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122) • Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220) • General Warehousing and Storage (NAICS 493110) • Refrigerated Warehousing and Storage (NAICS 493120) • Other Warehousing and Storage (NAICS 493190)	This should be focused on freight trucking and warehousing to support existing and target industries. This was noted as an opportunity among stakeholders due to the region's access to large regional metro areas.

Target Industry Screening

RECOMMENDED TARGET INDUSTRIES

Based on the analysis in this section, we recommend the following industries as targets for the region. Each target industry has a set of key competitive advantages of the region. Positioning for each target industry will be added to the following section of this report.

Target Industry	Subsectors of Focus	Comments
Food and Beverage Processing	• Confectionery Manufacturing from Purchased Chocolate (NAICS 311352) • Cheese Manufacturing (NAICS 311513) • Coffee and Tea Manufacturing (NAICS 311920) • Bottled Water Manufacturing (NAICS 312112) • Ice Manufacturing (NAICS 312113) • Breweries (NAICS 312120) • Wineries (NAICS 312130)	The region has a large presence of agriculture and Fayette County has the opportunity to capture value-added processing of agricultural commodities. Success in this industry would be based on water/sewer capacity of the county and available sites.
Chemicals and Plastics Manufacturing	• Synthetic Rubber Manufacturing (NAICS 325212) • Toilet Preparation Manufacturing (NAICS 325620) • Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing (NAICS 326130) • Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150) • All Other Plastics Product Manufacturing (NAICS 326199)	Plastics show a potential for Fayette County, as there is a cracker plant nearing completion North of Pittsburgh that will generate polyethylene pellets, which are extremely cost-effective to ship. Success in this industry would be based on water/sewer capacity of the county and available sites.
Metal Manufacturing	• Secondary Smelting and Alloying of Aluminum (NAICS 331314) • Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (NAICS 331491) • Powder Metallurgy Part Manufacturing (NAICS 332117) • Prefabricated Metal Building and Component Manufacturing (NAICS 332311) • Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420) • Industrial Valve Manufacturing (NAICS 332911) • Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994) • All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	This is a regional target industry, but there is currently not a lot of it in Fayette County. There could be opportunities in some of the higher growth industries.

Target Industry Screening

RECOMMENDED TARGET INDUSTRIES - ASPIRATIONAL

The following industries show opportunity to Fayette County; however, there are challenges that need to be overcome in order for the County to enhance its competitiveness for each.

Target Industry	Subsectors of Focus	Comments
Information Technology	• Custom Computer Programming Services (NAICS 541511) • Computer Systems Design Services (NAICS 541512) • Computer Facilities Management Services (NAICS 541513) • Other Computer Related Services (NAICS 541519)	This industry offers opportunities for economic diversification in the region and with the access to regional educational institutions, there is an opportunity for Fayette County to capture some of that talent.
Research and Development	• Research and Development in Nanotechnology (NAICS 541713) • Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714) • Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715) • Research and Development in the Social Sciences and Humanities (NAICS 541720)	These have been high growth industries in the region and are projected to continue to grow in the region and nationally. Focus should be on recruiting the research and development functions of existing companies and industries to the region.