

Diversified Manufacturing

2006 Annual Update

Analysis for the counties of Centre, Clinton, Columbia, Lycoming, Mifflin, Montour, Northumberland, Snyder and Union

Industries Included in the Diversified Manufacturing Cluster

- Food manufacturing
- Textile manufacturing
- Apparel manufacturing
- Paper manufacturing
- Printing & related support activities
- Petroleum and coal products
- Chemical manufacturing
- Plastics and rubber products
- Primary metal manufacturing
- Fabricated metal products
- Machinery manufacturing
- Computer and electronic product manufacturing
- Electrical equipment, appliance and component manufacturing
- Transportation equipment mfg.
- Metal furniture and related product manufacturing

Top 5 Employing Industries 26.06% of Cluster Jobs

- Printing
- Motor vehicle body and trailer mfg.
- Electronic instrument manufacturing
- Other plastics product manufacturing
- Ornamental and architectural metal products

(1) Number of individual establishments or physical location of a certain economic activity.

(2) Location Quotient (LQ) is a statistical measure that compares the concentration of employment in a local industry cluster to the concentration of employment in the same cluster statewide or nationally. An LQ of greater than 1.0 suggests that a locale has a competitive advantage within a cluster and is producing goods or services in excess of the local consumption, thus resulting in exportation of goods or services. An LQ of less than one suggests that an industry is falling behind local demand and is importing the good or service.

Cluster Statistics

Based on the North American Industrial Classification System (NAICS)	Central Region
Employer Units ¹	554
Number of Jobs	31,396
Net Change in Job Volume (2002-2006)	-7,570
Percent Change in Job Volume (2002-2006)	-19.40%
Cluster Jobs as a Percent of Total Regional Jobs	12.63%
Average Annual Wages	\$38,917
Estimated Cluster Payroll	\$1,222,000,000
State Location Quotient ² (LQ)	1.36
Percent Change from 2002 State Location Quotient	-7.88%
National Location Quotient ² (LQ)	1.60
Percent Change from 2002 National Location Quotient	-10.57%

Job Volume by County

<u>0 to 2,500 Jobs</u>	<u>2,501 to 5,000 Jobs</u>	<u>Greater than 5,000 Jobs</u>
Montour	Centre	Columbia
Snyder	Clinton	Lycoming
Union	Mifflin	
	Northumberland	

Five Most Common Occupations and Second Quarter 2007 Wages*

Regional high priority occupations for this region are shown in *italics*.

<i>Team assemblers</i>	\$25,605
Helpers--Production workers	\$22,090
<i>First-line supervisors/managers of production and operating workers</i>	\$46,530
<i>Inspectors, testers, sorters, samplers, and weighers</i>	\$25,002
<i>Welders, cutters, solderers, and brazers</i>	\$30,264

Competitive Industries by National LQ (2006)

Individual industries could demonstrate a high LQ due to the uniqueness of the business's primary function rather than competitiveness factors.

Lime manufacturing	21.47
Blind and shade manufacturing	18.02
Snack food manufacturing	13.40
Other converted paper product manufacturing	12.85
Rolling and drawing of purchased steel	11.39

*Top occupations determined by a staffing pattern provided by Economic Modeling Specialists, Inc. (EMSI). Staffing patterns are based on the available NAICS codes at the 5-digit level. Second quarter 2007 wages are reflective of the averages for the Central Pennsylvania Workforce Investment Area.

All other data was provided by the Pennsylvania Department of Labor and Industry's Center for Workforce Information and Analysis (CWIA) for the period 2002 to 2006 and calculated by Central Pennsylvania Workforce Development Corporation. CWIA is not liable for the content as presented nor does CWIA necessarily endorse the statements made herein. Employment data does not account for any closures, layoffs or expansions that have occurred since 2006.



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Education

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Industries Included in the Education Cluster

- School buses
- Libraries
- Professional and technical services
- Elementary and secondary schools
- Junior colleges
- Colleges and universities
- Business, computer and management training
- Technical and trade schools
- Other schools and instruction
- Educational support services
- Vocational rehabilitation services
- Child day care
- Administration of human resource programs

Top 5 Employing Industries

92.23% of Cluster Jobs

- Colleges and universities
- Elementary and secondary schools
- Child day care services
- School and employees bus transportation
- Engineering services

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Cluster Statistics

Based on the North American Industrial Classification System (NAICS)	Central Region
Employer Units ¹	968
Number of Jobs	41,249
Net Change in Job Volume (2002-2006)	1,155
Percent Change in Job Volume (2002-2006)	2.90%
Cluster Jobs as a Percent of Total Regional Jobs	16.59%
Average Annual Wages	\$40,474
Estimated Cluster Payroll	\$1,670,000,000
State Location Quotient ² (LQ)	1.36
Percent Change from 2002 State Location Quotient	-2.22%
National Location Quotient ² (LQ)	1.40
Percent Change from 2002 National Location Quotient	-1.07%

Job Volume by County

<u>0 to 2,000 Jobs</u>	<u>2,001 to 5,000 Jobs</u>	<u>Greater than 5,000 Jobs</u>
Clinton	Columbia	Centre
Mifflin	Northumberland	Lycoming
Montour	Union	
Snyder		

Five Most Common Occupations and Second Quarter 2007 Wages*

Regional high priority occupations for this region are shown in *italics*.

<i>Child care workers</i>	\$15,142
<i>Postsecondary teachers</i>	\$68,016
<i>Management analysts</i>	\$52,582
Bus drivers, school	\$19,448
<i>Teacher assistants</i>	\$23,754

Competitive Industries by National LQ (2006)

Individual industries could demonstrate a high LQ due to the uniqueness of the business's primary function rather than competitiveness factors.

Colleges and universities	4.08
School and employee bus transportation	3.18
Sports and recreation instruction	1.55
Libraries and archives	1.08
Child day care services	1.04

*Top occupations determined by a staffing pattern provided by Economic Modeling Specialists, Inc. (EMSI). Staffing patterns are based on the available NAICS codes at the 5-digit level and do not consider public education. Second quarter 2007 wages are reflective of the averages for the Central Pennsylvania Workforce Investment Area. Specific postsecondary teachers are identified on the Central Region high priority occupations list.

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Healthcare

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Industries Included in the Healthcare Cluster

- Pharmaceutical and medicine mfg.
- Medical equipment and supplies manufacturing
- Electronic equipment mfg.
- Medical equipment wholesalers
- Pharmacies and drug stores
- Physicians
- Mental health physicians
- Dentists
- Other health practitioners
- Outpatient care centers
- Medical laboratories
- Home health services
- Hospitals
- Nursing care facilities
- Residential care facilities

Top 5 Employing Industries 65.12% of Cluster Jobs

- General medical/surgical hospitals
- Nursing care facilities
- Offices of physicians
- Community care facilities for the elderly
- Residential mental retardation facilities

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Cluster Statistics

Based on the North American Industrial Classification System (NAICS)	Central Region
Employer Units ¹	1,377
Number of Jobs	34,714
Net Change in Job Volume (2002-2006)	2,069
Percent Change in Job Volume (2002-2006)	6.30%
Cluster Jobs as a Percent of Total Regional Jobs	13.96%
Average Annual Wages	\$39,274
Estimated Cluster Payroll	\$1,363,000,000
State Location Quotient ² (LQ)	0.89
Percent Change from 2002 State Location Quotient	2.32%
National Location Quotient ² (LQ)	1.11
Percent Change from 2002 National Location Quotient	2.01%

Job Volume by County

<u>0 to 2,000 Jobs</u>	<u>2,001 to 5,000 Jobs</u>	<u>Greater than 5,000 Jobs</u>
Clinton	Columbia	Centre
Snyder	Mifflin	Lycoming
	Northumberland	Montour
	Union	

Five Most Common Occupations and Second Quarter 2007 Wages*

Regional high priority occupations for this region are shown in *italics*.

<i>Registered nurses</i>	\$48,651
<i>Nursing aides, orderlies, and attendants</i>	\$21,133
<i>Licensed practical and licensed vocational nurses</i>	\$32,926
Physicians and surgeons	\$153,650
<i>Home health aides</i>	\$17,909

Competitive Industries by National LQ (2006)

Individual industries could demonstrate a high LQ due to the uniqueness of the business's primary function rather than competitiveness factors.

Analytical laboratory instrument mfg.	5.85
Offices of mental health practitioners	3.38
Other outpatient care centers	3.01
Psychiatric and substance abuse hospitals	2.74
Residential mental retardation facilities	2.40

*Top occupations determined by a staffing pattern provided by Economic Modeling Specialists, Inc. (EMSI). Staffing patterns are based on the available NAICS codes at the 5-digit level. Second quarter 2007 wages are reflective of the averages for the Central Pennsylvania Workforce Investment Area.

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Lumber and Wood Products

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Industries Included in the Lumber & Wood Products Cluster

- Logging
- Sawmills & wood preservation
- Plywood & engineered wood prod.
- Millwork
- Wood containers and pallets
- All other wood products
- Wood kitchen cabinets and counter-tops
- Upholstered household furniture
- Non-upholstered wood household furniture
- Institutional furniture
- Wood TV, radio and sewing machine housings
- Wood office furniture
- Custom architectural woodwork and millwork
- Showcases, partitions, shelving and lockers
- Lumber and wood merchant wholesalers
- Home centers
- Other building material dealers

Top 5 Employing Industries

77.90% of Cluster Jobs

- All other wood product mfg.
- Wood kitchen cabinet /countertop manufacturing
- Home centers
- Millwork
- Institutional furniture manufacturing

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Cluster Statistics

Based on the North American Industrial Classification System (NAICS)	Central Region
Employer Units ¹	287
Number of Jobs	13,196
Net Change in Job Volume (2002-2006)	193
Percent Change in Job Volume (2002-2006)	1.50%
Cluster Jobs as a Percent of Total Regional Jobs	5.31%
Average Annual Wages	\$32,220
Estimated Cluster Payroll	\$425,000,000
State Location Quotient ² (LQ)	3.23
Percent Change from 2002 State Location Quotient	-4.54%
National Location Quotient ² (LQ)	3.20
Percent Change from 2002 National Location Quotient	-1.97%

Job Volume by County

<u>Less than 1,000 Jobs</u>	<u>Greater than 1,000 Jobs</u>
Centre	Lycoming
Clinton	Northumberland
Columbia	Snyder
Mifflin	Union
Montour	

Five Most Common Occupations and Second Quarter 2007 Wages*

Regional high priority occupations for this region are shown in *italics*.

<i>Team assemblers</i>	\$25,605
<i>Cabinetmakers and bench carpenters</i>	\$33,030
<i>Carpenters</i>	\$29,245
<i>Woodworking machine setters, operators, and tenders, except sawing</i>	\$23,733
Retail salespersons	\$19,219

Competitive Industries by National LQ (2006)

Individual industries could demonstrate a high LQ due to the uniqueness of the business's primary function rather than competitiveness factors.

All other wood product manufacturing	20.62
Institutional furniture manufacturing	15.10
Wood kitchen cabinet and countertop mfg.	10.78
Wood office furniture manufacturing	5.31
Forest nursery and gathering forest products	3.48

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