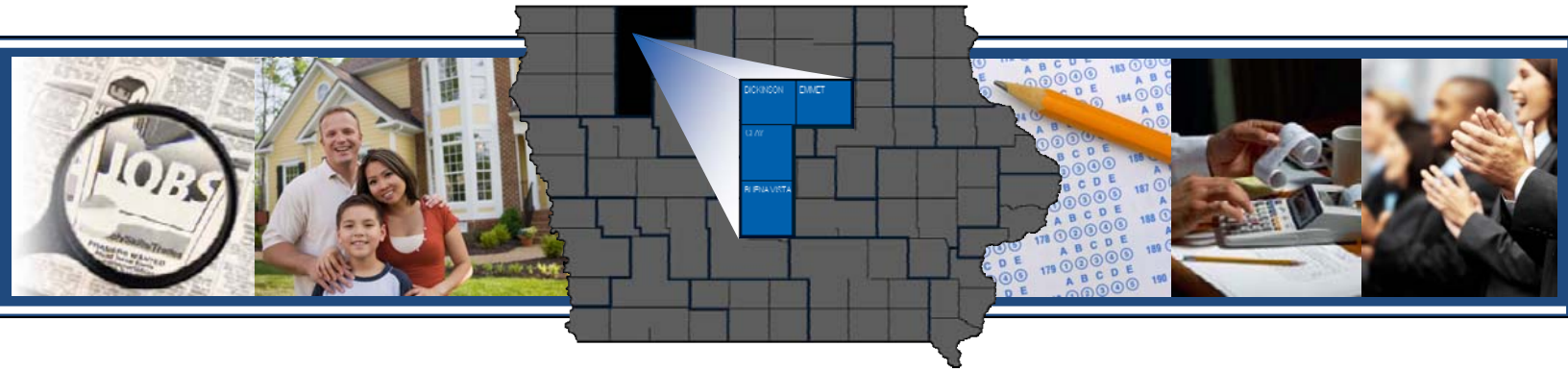
Workforce and Economic Development Regional Status Report

Buena Vista, Clay, Dickinson and Emmet Counties



Strategic Objectives

- 200,000 New Jobs
- 25% Increase in Family Incomes
- Best Schools in the Nation
- 15% Reduction in Government Costs

Released September 2014

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Workforce and Economic Development Regional Status Report

Buena Vista, Clay, Dickinson and Emmet Counties

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INTRODUCTION

In January of 2011, Governor Terry Branstad released a set of goals aimed at improving the socio-economic environment of Iowans. These goals include: creating 200,000 new jobs, increasing family incomes by 25 percent, providing Iowa's youth with the best education in the nation and reducing State government costs by 15 percent. This is the third annual report to delineate some of the opportunities and challenges Iowa faces in several areas as they relate to the attainment of these goals. The State of Iowa was analyzed as a whole and regional reports based on economic development regional marketing group territories and Laborshed areas were independently analyzed. This is the regional report for Buena Vista, Clay, Dickinson and Emmet counties.

This region is home to over 64,000 people and employs slightly over 32,600 non-farm jobs as of 2013. The largest town, with over 11,000 people, is Spencer. Other major towns include Storm Lake, Estherville and Spirit Lake.

Manufacturing; wholesale and retail trade; and accommodations and food services are the region's top industries. This is a little different than the State as a whole, as the top three industry sectors by employment for Iowa are wholesale and retail trade; manufacturing; and health services.

Throughout this report, the region will be benchmarked against the State of Iowa as well as the United States. Benchmarking facilitates an analysis of the competitive strengths and weaknesses of the region.

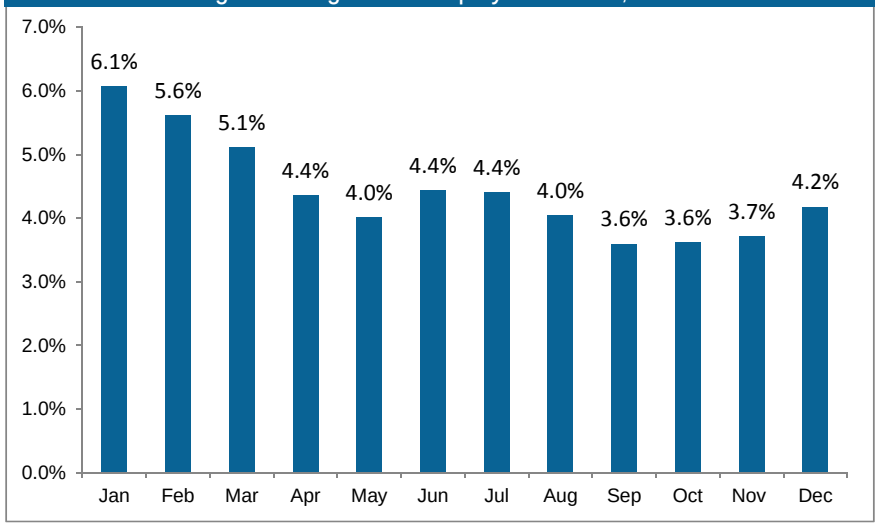
Although the majority of the data in this report represents the year ending December 2013, there are some data sources that are updated less frequently than others, in all cases the most current data available by time of publishing was used.

- The region's unadjusted unemployment rate dropped from 6.1 percent in January 2013 to 3.6 percent in September. However, it rose to 4.2 percent in December 2013 (Figure 1). Within the region, Dickinson County represents the highest percentage of unemployed (5.2%) while Buena Vista and Emmet counties represent the lowest (4.1%).

- According to the Bureau of Labor Statistics' *Quarterly Census of Employment and Wages* (QCEW), the total regional non-farm employment in January 2013 was 31,153 and in December 2013 it was 32,448, an increase of 1,295 jobs.

- According to the Iowa Unemployment Insurance Tax Database, there were 4,590 active business locations in the region as of May 2014.

Figure 1. Regional Unemployment Rates, 2013



Aggregate counties: Buena Vista, Clay, Dickinson and Emmet counties

Source: Bureau of Labor Statistics

DEMOGRAPHIC PROFILE

DEMOGRAPHIC PROFILE SUMMARY

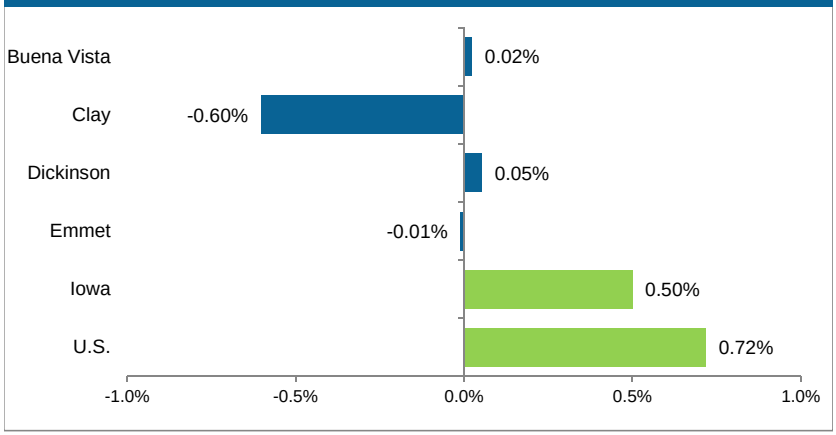
- The region experienced a population decrease of 0.14 percent between 2012 and 2013, while the State as a whole experienced 0.50 percent population growth. Clay County had the highest negative growth rate in the region at -0.60 percent.
- The region lost 1,002 residents on a net-migration basis in 2012, with Clay County having the greatest negative net-migration in the region (-679).
- There is much disparity between county age distributions within the region, with Dickinson County having the highest median age (48.3) and Buena Vista County having the lowest (36.5).
- Buena Vista County has the greatest percentage of Hispanic population in the region (23.1%).
- The counties in the region have varying average commute times, with Buena Vista County having the shortest (13.3 minutes) and Emmet County having the longest (18.2 minutes). The statewide average is 18.7 minutes.

Before addressing the factors that relate to the strategic goals, the overall make-up of both the regional population and its infrastructure will be examined. The following section addresses demographic trends in the region over the past two decades. Specifically, it assesses the current population, population trends, diversity and age distribution.

POPULATION GROWTH

The region shrunk by 0.14 percent (estimated 87 people) from 2012 to 2013. Dickinson and Buena Vista counties are the only counties in the region to experience population growth during this time period, 0.05 percent and 0.02 percent, respectively. Clay County experienced the greatest negative growth at 0.6 percent, an estimated loss of 100 people (Figure 2).

Figure 2. Population Growth Comparison 2012-2013

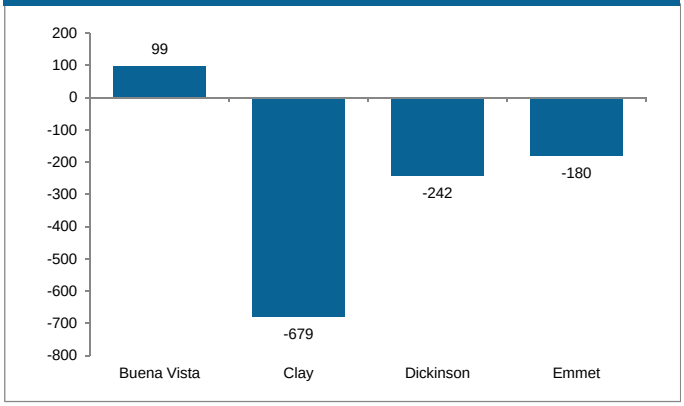


Source: Census Bureau, 2013 population estimates

MIGRATION

The region has lost 1,002 residents on a net basis as a result of migration. Figure 3, on the next page, illustrates the region's net migration. The U.S. Census Bureau's *American Community Survey* reveals net migration totals as a result of in-flows and out-flows, offering a clear picture of which counties in Iowa are gaining new residents. Buena Vista County acquired the most new residents (99). Clay County lost 679 residents on a net migration basis, the biggest change in the region.

Figure 3. 2012 Migration:
Largest Gains/Losses by County



Source: Census Bureau, 2012 ACS

AGE

There is a substantial variance in median age within the region, with Buena Vista County being the youngest county in the region with a median age of 36.5 years, while Dickinson County is the oldest with a median age of 48.3 years (**Figure** 4).

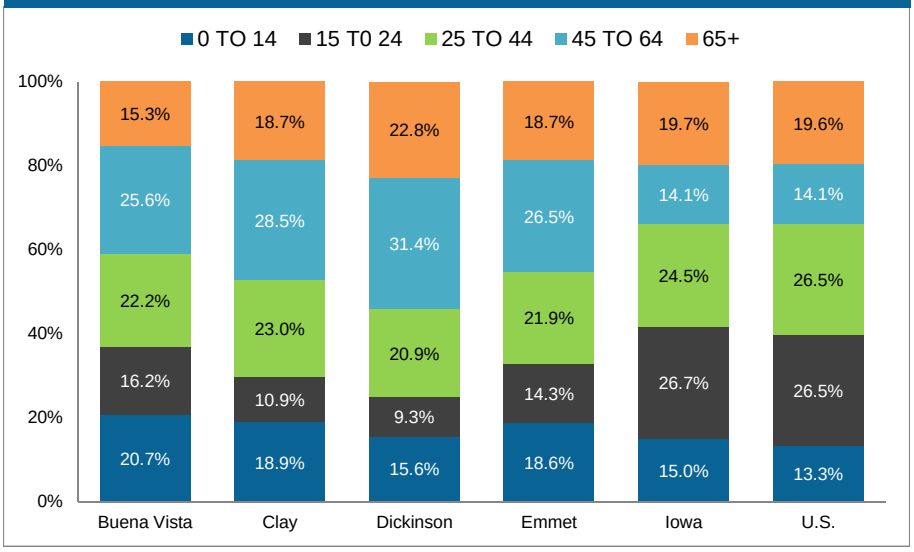
Figure 5 illustrates the breakdown of age distribution for each of the counties in the region, the State and the nation. Dickinson County is the oldest county in the region with 54.2 percent of its population being 45 or older. Comparatively, only 40.9 percent of Buena Vista County's population is 45 or older. Each county in the region has a larger percentage of their population that is 45 years or older than either the State (33.8%) or the nation (33.7%) as a whole.

Figure 4. Median Age, 2012

Buena Vista	36.5
Clay	42.8
Dickinson	48.3
Emmet	40.2
Iowa	38.0
U.S.	37.3

Source: Census Bureau, 2012 ACS

Figure 5. Age Distribution, 2012



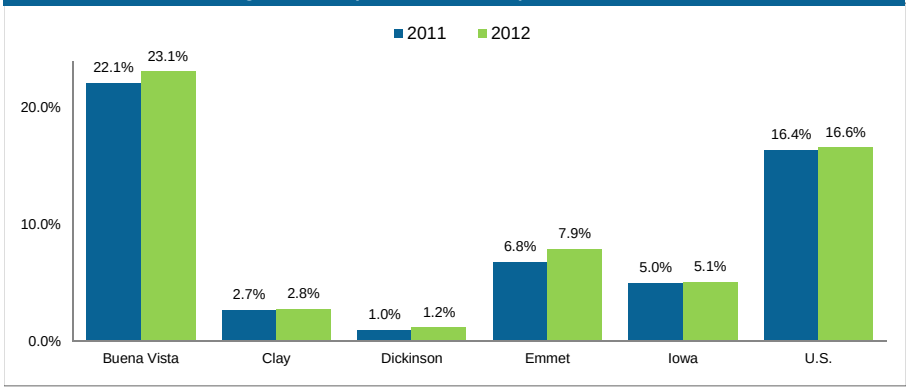
Source: Census Bureau, 2012 ACS

DIVERSITY

According to the U.S. Census Bureau, "Hispanic" or "Latino" is an indication of heritage, nationality, lineage or reference to country of birth rather than a particular race. People who identify their origin as Spanish, Hispanic or Latino may be of any race.

The Hispanic population in Iowa has grown to 5.1 percent as of 2012 (Figure 6). The growth in the State's Hispanic population mirrors national growth trends. Buena Vista County had the highest percentage of Hispanic population in the region. In 2012, 23.1 percent of the population identified themselves as Hispanic. This was a 1.0 percent increase over 2011. Within the region, Emmet County saw the greatest percentage increase (1.1%) during this time period.

Figure 6. Hispanic/Latino Population Growth

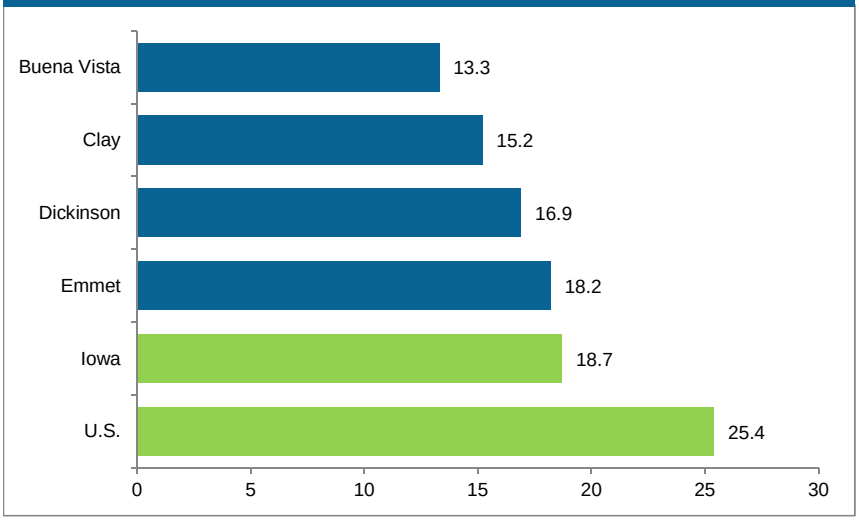


Source: Census Bureau, 2012 ACS

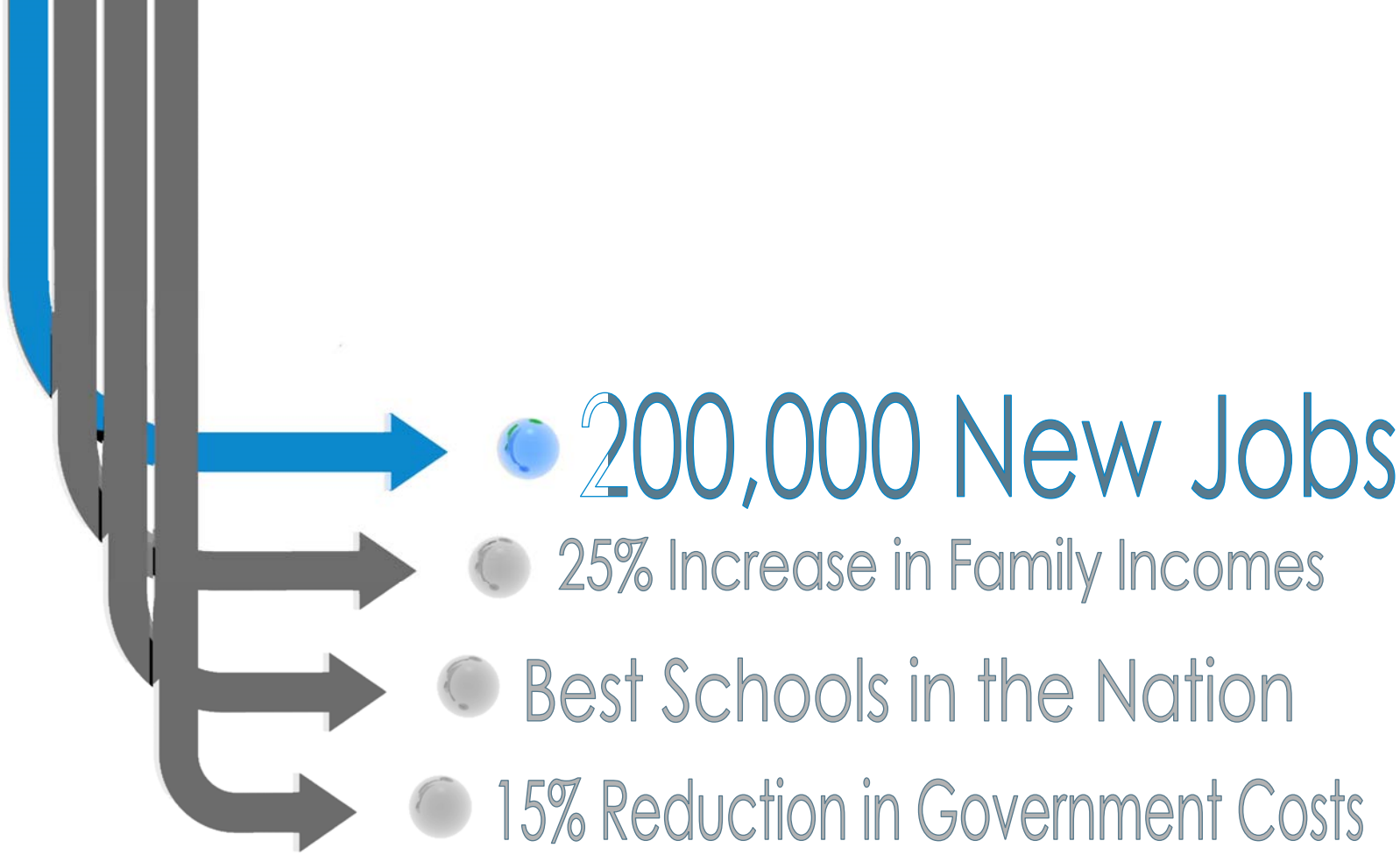
COMMUTE TIMES

All of the counties in this region have a shorter average commute time than the State as a whole (Figure 7). Buena Vista County has the shortest average commute time in the region at 13.3 minutes while Emmet County has the longest at 18.2 minutes.

Figure 7. Average Travel Time to Work (in minutes), 2012



Source: Census Bureau, 2012 ACS



200,000 NEW JOBS SUMMARY

- In 2013, Iowa had an unemployment rate of 4.7 percent, significantly less than the U.S. unemployment rate of 7.4 percent. Among counties in this region, Buena Vista and Emmet counties had the lowest unemployment rate in 2013 at 4.1 percent each.
- The region's economy is heavily dominated by manufacturing; wholesale and retail trade; and accommodation and food services, that combined employ 59.5 percent of the region's workers.
- The labor force shrunk by 2.9 percent in the region between 2008 and 2013, compared to a -0.3 percent negative growth statewide.
- Health care and social assistance employment increased by 341 between 2008 and 2013, the largest industry increase in the region.
- The sectors that lost the largest number of net jobs in the region between 2008 and 2013 were manufacturing (475); administrative support services (243); retail trade (154); agriculture (140); professional, scientific and technical services (119); and management of companies (105). .

200,000 NEW JOBS

One of the top goals of the current administration is to create 200,000 new jobs in the private industry, for Iowans over the next five years. This section of the report covers areas that relate to this goal; pointing out areas of opportunity and highlighting certain challenges that face Iowa and specifically this region.

ECONOMIC SCAN

Figure 8 briefly summarizes key data points that are discussed in further detail throughout this report. Buena Vista County is the most populated county in this region. Between 2012 and 2013 population growth was 0.50 percent in Iowa, below the population growth nationwide but greater than the negative population growth of the region (-0.14%). Between 2008 and 2013, the labor force in Iowa shrunk by only 0.33 percent. While Clay County experienced negative labor force growth of 5.9 percent, Buena Vista County had the only positive labor force growth in the region at 0.9 percent.

The unemployment rate in Iowa was 4.7 percent for 2013 which was lower than the nation as a whole. Within the region, Buena Vista and Emmet counties had the lowest unemployment rate (4.1%) while Dickinson County had the highest (5.2%). Median household income growth since 2002 (24.2%) pushed the median household income in Iowa to $50,997 as of 2012. The median household income is relatively low in the majority of the counties in this region. Emmet, Buena Vista and Clay counties all trail both the Iowa and U.S. median household income. Alternately, Iowa's 2012 per capita personal income is $43,935. All of the counties in this region, except Emmet County, have a higher per capita personal income than either Iowa or the nation as a whole, with Dickinson County having the highest in the region at $49,601.

Figure 8. Quick Population and Economic Statistics

	Buena Vista	Clay	Dickinson	Emmet	Iowa	U.S.
Population (2013)	20,567	16,491	16,955	9,996	3,090,416	316,128,839
Population Growth ('12-'13)	0.02%	-0.60%	0.05%	-0.01%	0.50%	0.72%
Annual Unemployment Rate (2013)	4.1%	4.3%	5.2%	4.1%	4.7%	7.4%
Labor Force Growth ('08-'13)	0.9%	-5.9%	-3.2%	-4.3%	-0.33%	0.7%
Median Household Income (2012)	$45,582	$48,190	$51,885	$44,060	$50,997	$51,371
Median Household Income Growth ('02-'12)	25.6%	27.4%	27.6%	29.8%	24.2%	21.1%
Per Capita Personal Income (2012)	$44,042	$47,330	$49,601	$42,038	$43,935	$43,735
% Undergraduate Degree+ (2012)	20.8%	18.7%	27.1%	16.2%	25.3%	28.5%
% in 25-44 Age Group (2012)	22.2%	23.0%	20.9%	21.9%	24.5%	26.5%

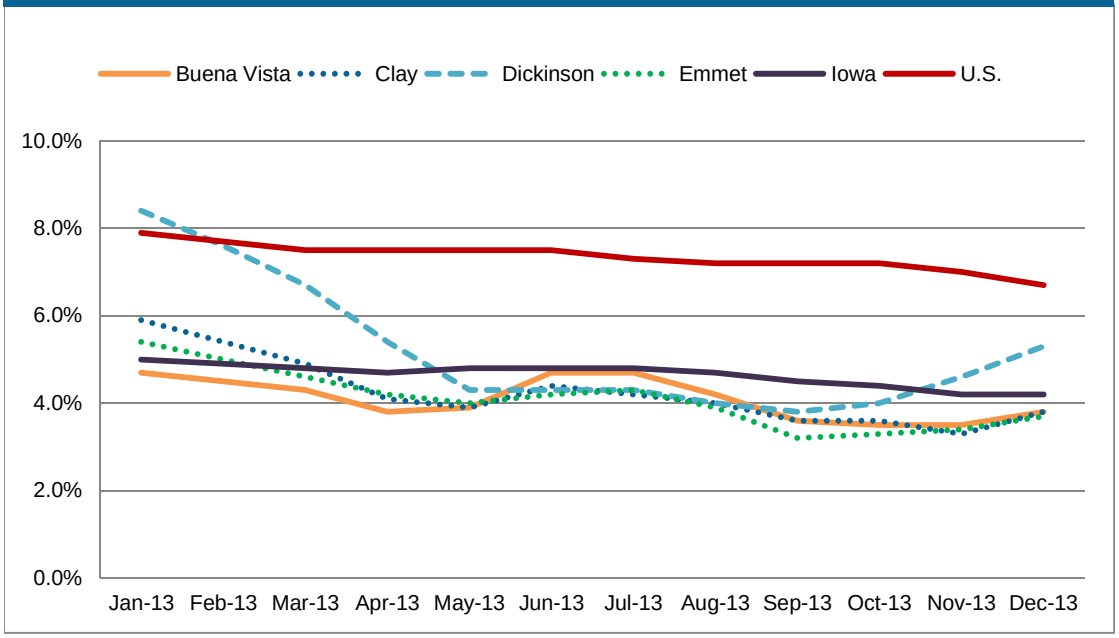
Sources: Census Bureaus, Bureau of Labor Statistics and Bureau of Economic Analysis

EMPLOYMENT AND UNEMPLOYMENT

Iowa's unemployment rate consistently ranks below the national unemployment rate and this trend is illustrated in Figure 9, on the next page. Even with the slightly higher unemployment rate in the middle of 2013, in general, Iowa's rate remained steady throughout 2013, starting at 5.0 percent in January, and dropping to 4.2 percent in December. Unemployment rates for the counties in this region are shown, as well, although the county rates shown are not seasonally adjusted and the Iowa and U.S. rates are.

Overall, the counties in the region show similar patterns throughout 2013 (Figure 9). Buena Vista County had the lowest unemployment rate in the region for portions of 2013, with rates ranging between 3.5 and 4.7 percent. Dickinson County had the highest unemployment rates in the region for the majority of 2013; ranging from 3.8 percent to 8.4 percent.

Figure 9. Monthly Unemployment Rate, January to December 2013



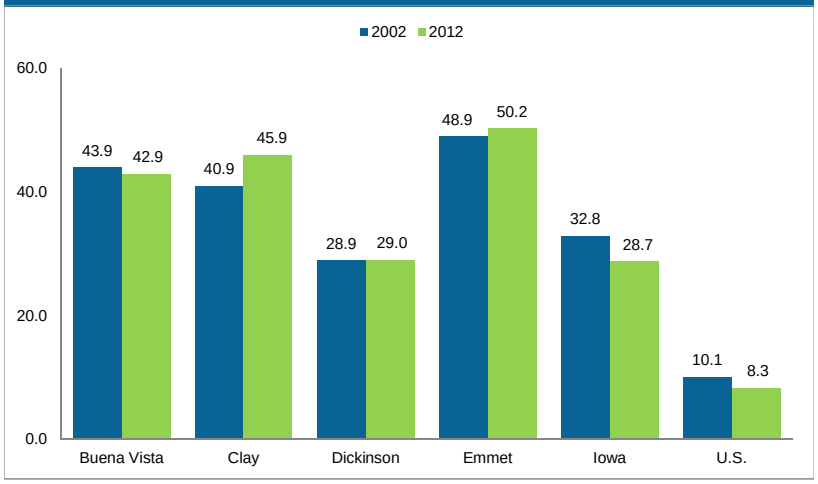
Note: Iowa and U.S. rates are seasonally adjusted, while the county rates are not.

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Self-employed farm employment is not reflected by the Bureau of Labor Statistics (BLS), which only includes larger farm employment statistics. Figure 10 reflects farm employment per 1,000 residents. It is clear that agriculture is very strong in Iowa, with over three times the number of farm employees per capita than the U.S. However, Iowa has experienced a decrease in farm employment from 32.8 in 2002 to 28.7 in 2012. However, three of the four counties represented in this region have shown an increase in farm employment since 2002. All of the counties have high farm employment per 1,000 residents, with Emmet County having the highest at 50.2 in 2012 an increase of 1.3 since 2002.

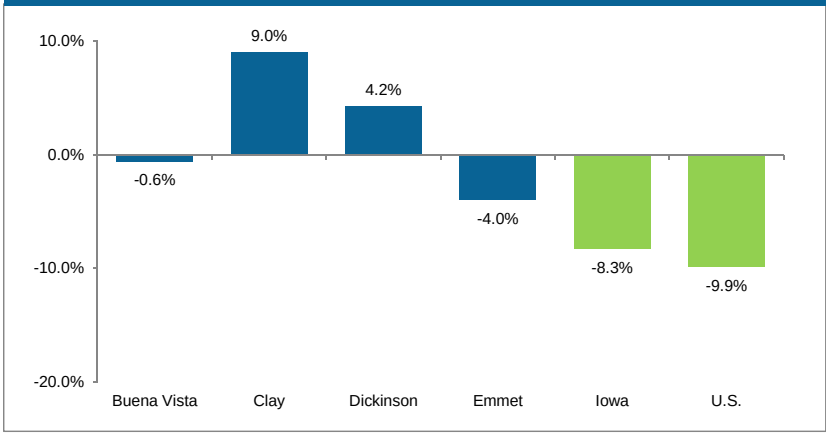
Figure 11 illustrates the farm employment change for each county as compared to Iowa and the U.S. Proportionally, the region saw an increase (2.2%) in farm employment over the last decade compared to the decline experienced by both the State and the nation. Within the region, Clay County experienced the largest increase (9.0%) during this time.

Figure 10. Farm Employment (per 1,000 residents), 2002 & 2012



Source: Bureau of Economic Analysis

Figure 11. Farm Employment Change, 2002-2012



Source: Bureau of Economic Analysis

Figure 12. Industry Mix, 2013												
Industry	Buena Vista		Clay		Dickinson		Emmet		Iowa		U.S.	
	Employment	Share	Employment	Share	Employment	Share	Employment	Share	Employment	Share	Employment	Share
Accommodations and Food Services	702	8.7%	661	9.2%	1,350	17.7%	255	8.3%	118,959	8.0%	12,253,885	9.2%
Administrative and Support and Waste Management and Remediation Services	299	3.7%	308	4.3%	354	4.6%	-	-	69,017	4.6%	8,346,307	6.2%
Agriculture, Forestry, Fishing and Hunting	661	8.2%	-	-	-	-	-	-	18,961	1.3%	1,216,938	0.9%
Arts, Entertainment and Recreation	40	0.5%	171	2.4%	192	2.5%	20	0.7%	19,218	1.3%	2,413,591	1.8%
Construction	248	3.1%	413	5.7%	484	6.3%	195	6.4%	69,157	4.6%	5,995,101	4.5%
Educational Services	-	-	72	1.0%	19	0.2%	509	16.6%	145,684	9.7%	12,127,650	9.1%
Finance and Insurance	307	3.8%	209	2.9%	239	3.1%	116	3.8%	90,237	6.0%	5,657,241	4.2%
Health Care and Social Assistance	-	-	1,007	14.0%	786	10.3%	-	-	213,279	14.3%	19,453,929	14.5%
Information	71	0.9%	185	2.6%	73	1.0%	64	2.1%	26,535	1.8%	2,844,023	2.1%
Management of Companies and Enterprises	-	-	-	-	26	0.3%	-	-	16,517	1.1%	2,086,724	1.6%
Manufacturing	3,294	40.8%	839	11.7%	1,888	24.7%	815	26.7%	214,359	14.3%	12,039,266	9.0%
Mining, Quarrying and Oil and Gas Extraction	-	-	-	-	-	-	-	-	2,228	0.1%	813,258	0.6%
Other Services (except Public Administration)	189	2.3%	219	3.0%	165	2.2%	65	2.1%	44,017	2.9%	4,186,889	3.1%
Professional, Scientific and Technical Services	-	-	-	-	154	2.0%	119	3.9%	46,863	3.1%	8,227,711	6.1%
Public Administration	416	5.1%	402	5.6%	324	4.2%	188	6.1%	67,373	4.5%	7,232,987	5.4%
Real Estate and Rental and Leasing	39	0.5%	69	1.0%	67	0.9%	13	0.4%	13,457	0.9%	2,035,300	1.5%
Retail Trade	1,183	14.6%	1,463	20.4%	1,251	16.4%	487	15.9%	177,914	11.9%	15,136,089	11.3%
Transportation and Warehousing	142	1.8%	361	5.0%	41	0.5%	212	7.0%	63,399	4.3%	5,177,204	3.9%
Utilities	57	0.7%	146	2.0%	27	0.5%	-	-	8,096	0.6%	801,397	0.7%
Wholesale Trade	433	5.3%	662	9.2%	193	2.6%	-	-	69,276	4.7%	5,738,498	4.3%
TOTAL	8,081	100%	7,187	100%	7,633	100%	3,058	100%	1,494,546	100%	133,783,988	100%

- Data does not meet BLS or State agency disclosure standards and/or no data available for 2013.

Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

In addition to strong farm employment, this region's economy is dominated by three sectors. The majority of the employment in the region is in the manufacturing; wholesale and retail trade; and accommodations and food service sectors (see Figure 12 below). The green highlighted areas within Figure 12 indicate the highest number and share of employment for each county, the State and the nation.

According to Hoovers On-line, the top employers in the region include: Polaris Industries, Inc., The Hillshire Brands Company, Spencer Municipal Hospital, Eaton Corporation, Buena Vista Regional Medical Center, Wal-Mart Stores, Inc., Rembrandt Enterprises, Inc., Lakes Regional Healthcare, Buena Vista University, Avera Health and Ministry Health Care, Inc.

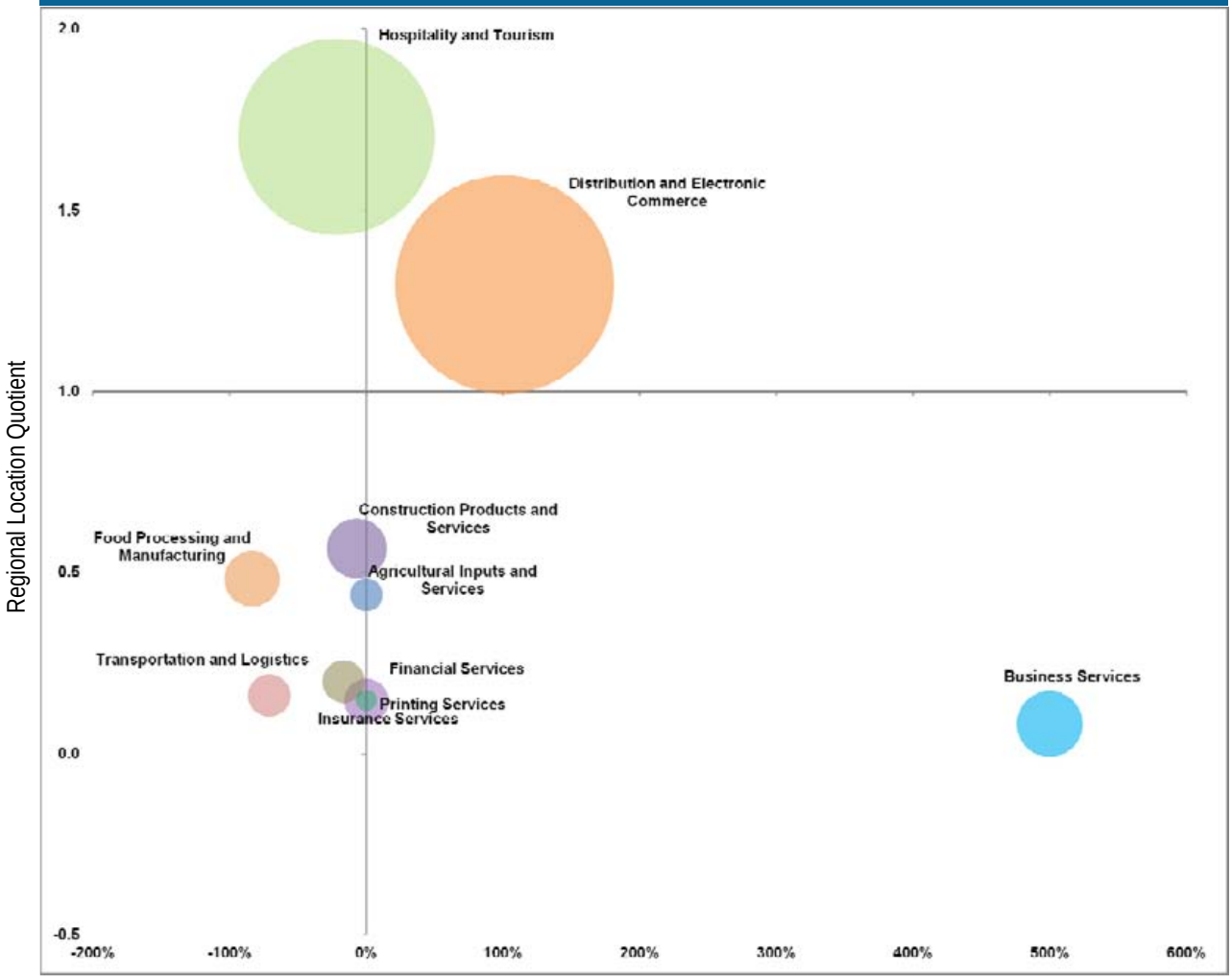
Figure 13 below displays the results from an analysis conducted to determine the strength of regional industry clusters relative to the national economy over time. A growing cluster concentration in a region may indicate that a cluster is capturing a larger share of new jobs, suggesting an improvement in the region's attractiveness and competitiveness for that industry cluster.

The vertical axis represents the industry's local strength. This is indicated by a location quotient (LQ). An LQ measures the relative employment concentration or specialization, of an industry cluster in a region in relation to the industry cluster at the national level. Specifically, an LQ is calculated by dividing a cluster's share of total regional employment by the cluster's share of total national employment. If an industry cluster's LQ is near or at 1.0 it means the cluster's employment concentration is similar to the national economy.

The horizontal axis represents the industry cluster's employment growth in the region between 2008 and 2013. A position on the left half of the chart indicates negative employment growth, while a position on the right side indicates positive employment growth.

The size of the bubbles represents the employment level of the industry cluster in the region, therefore, the larger the bubble, the more people work in the industry.

Figure 13. Regional Industry Cluster Concentration and Growth, 2008-2013



Clusters are based on Porter Cluster traded industry categories (see Appendix for cluster breakdown by industry).

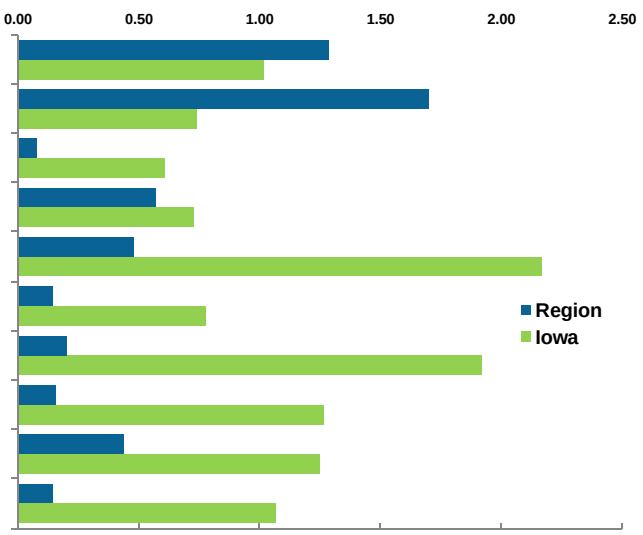
Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

Figure 13 on the previous page shows the region's largest industry cluster by employment is distribution and electronic commerce. The LQ for this industry cluster is near one (1.29), indicating that there is a similar concentration of distribution employment in the region compared to the nation as a whole. The second largest industry cluster by employment in the region is hospitality and tourism, and it has an LQ of 1.7. Therefore, there is only a slightly higher concentration of employment in the hospitality cluster in the region relative to the national proportion. However, the industry cluster did experience positive employment growth (101.0%) between 2008 and 2013.

Figure 14 below lists the 10 largest industry clusters by employment in the region in 2013, along with their location quotients. Among the top 10 industry clusters, hospitality and tourism had the largest location quotient in the region. However, between 2008 and 2013 the industry cluster experienced a regional negative growth rate of 22.0 percent. The industry clusters in the region with the largest location quotients after hospitality and tourism are distribution and electronic commerce (1.29); construction products and services (0.57); food processing and manufacturing (0.48); and agricultural inputs and services (0.44).

Figure 14. Location Quotient for Top 10 Regional Industry Clusters by Employment Level, 2013

Cluster	Region	Iowa
Distribution and Electronic Commerce	1.29	1.02
Hospitality and Tourism	1.70	0.74
Business Services	0.08	0.61
Construction Products and Services	0.57	0.73
Food Processing and Manufacturing	0.48	2.17
Financial Services	0.15	0.78
Insurance Services	0.20	1.92
Transportation and Logistics	0.16	1.27
Agricultural Inputs and Services	0.44	1.25
Printing Services	0.15	1.07



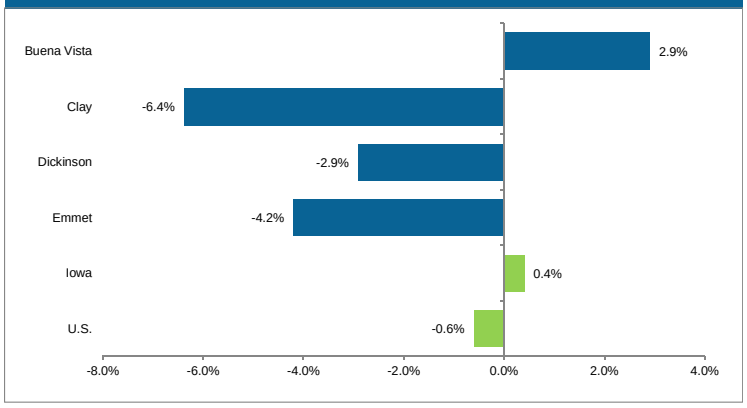
Clusters are based on Porter Cluster traded industry categories (see Appendix for cluster breakdown by industry).

Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

JOB AND BUSINESS CREATION

Between 2008 and 2013, Iowa experienced a net job gain of an estimated 5,838 jobs, an increase of 0.4 percent. All of the counties in this region, with the exception of Buena Vista County, experienced a decrease in non-farm employment during this time period. Clay County experienced the greatest loss at -6.4 percent representing an estimated 601 workers (Figure 15). At the same time, Buena Vista County grew by 2.9 percent or an estimated increase of 307 employees.

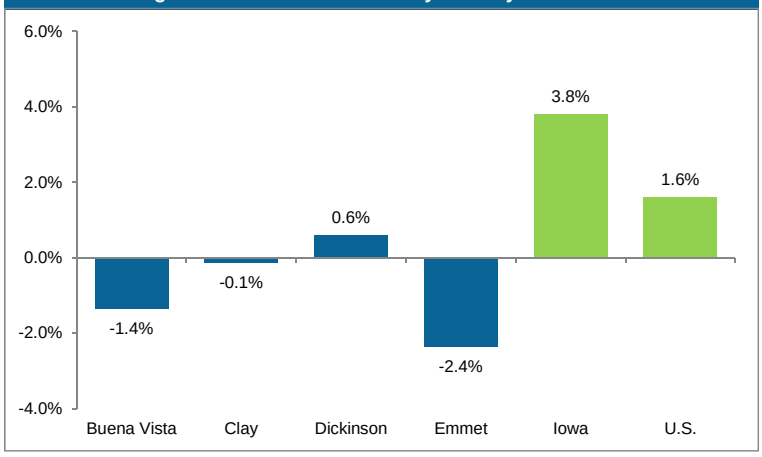
Figure 15. Non-Farm Employment 2008-2013



Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

The *Quarterly Census of Employment and Wages* through the Bureau of Labor Statistics measures the number of establishments based on businesses that pay unemployment insurance. Figure 16 shows the change by percentage for Iowa, the U.S. and each county in the region from 2008 to 2013. The majority of counties in the region experienced a decrease in number of establishments. Emmet County saw the greatest percentage decrease in the region at -2.4 percent.

Figure 16. Establishments by County 2008-2013



Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

The largest employment gain in the region, between 2008 and 2013, was in the health care and social assistance sector, which gained 341 jobs (Figure 17). Other substantial job gains occurred within the wholesale trade sector. There were some significant employment decreases in the region, primarily in the manufacturing; administrative support; retail trade; agriculture; professional, scientific and technical services; and management industry sectors. Overall, the region lost 1,353 jobs between 2008 and 2013.

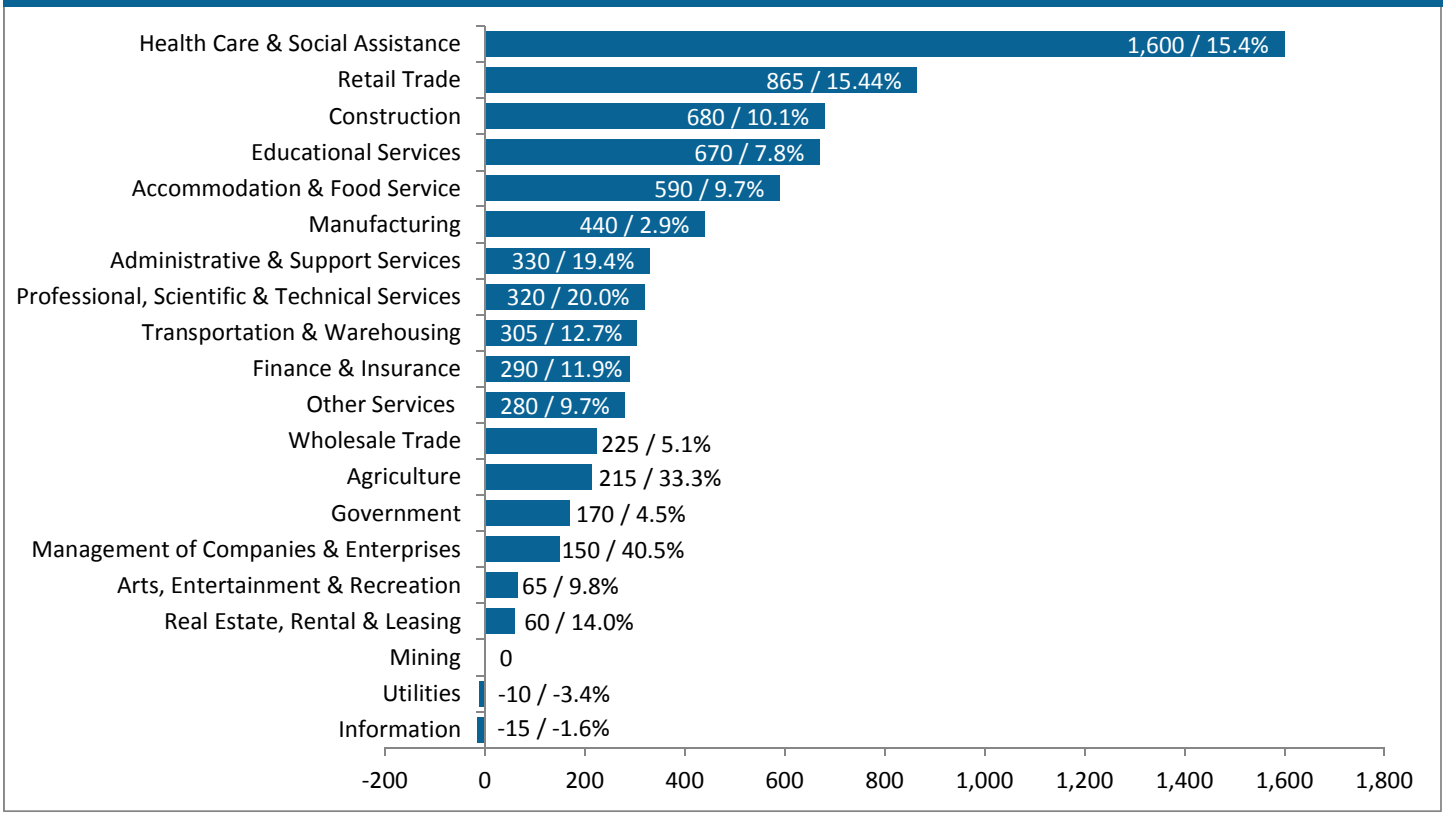
Figure 17. Change in Employment by Industry, 2008-2013

Industry	Regional Employment		Change	
	2008	2013	#	%
Health Care and Social Assistance	1,452	1,793	341	23.5%
Wholesale Trade	1,204	1,288	84	7.0%
Utilities	229	230	1	0.4%
Mining, Quarrying and Oil and Gas Extraction	0	0	0	0.0%
Transportation and Warehousing	759	756	-3	-0.4%
Finance and Insurance	889	871	-18	-2.0%
Public Administration	1,353	1,330	-23	-1.7%
Accommodations and Food Services	3,008	2,968	-40	-1.3%
Construction	1,403	1,340	-63	-4.5%
Educational Services	669	600	-69	-10.3%
Real Estate and Rental and Leasing	258	188	-70	-27.1%
Arts, Entertainment and Recreation	495	423	-72	-14.5%
Other Services (except Public Administration)	728	638	-90	-12.4%
Information	488	393	-95	-19.5%
Management of Companies and Enterprises	131	26	-105	-80.2%
Professional, Scientific and Technical Services	392	273	-119	-30.4%
Agriculture, Forestry, Fishing and Hunting	801	661	-140	-17.5%
Retail Trade	4,538	4,384	-154	-3.4%
Administrative and Support and Waste Management and Remediation Services	1,204	961	-243	-20.2%
Manufacturing	7,311	6,836	-475	-6.5%
Total	27,312	25,959	1,353	5.0%

Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

Regional industry projections (**Figure 18**) indicate large employment gains in the health care and social assistance; retail trade; construction; and educational services industry sectors. Percentage increases should also be noted. For instance, the professional, scientific and technical services industry shows a 20.0 percent projected increase in employment from 2012 to 2022.

Figure 18. Industry Employment Projections, 2012-2022



Data based on IWD Region Three/Four which includes: Buena Vista, Clay, Dickinson, Emmet, Kossuth, Lyon, O'Brien, Osceola, Palo Alto and Sioux counties. *Source: Iowa Workforce Development, Labor Force & Occupational Analysis Bureau*

Though smaller in overall employment numbers, the professional, scientific and technical services industry includes a wide variety of positions such as: auditors, management analysts, computer support specialists, computer network architects, public relations specialists, mechanical engineers, scientists, architects, etc. The aggregate occupations in the professional, scientific and technical services industry earn an average of $70,990 per year nationally, $64,982 per year in Iowa and $44,024 in the region (**Figure 19**).

Figure 19. Industry Average Annual Wages, 2013

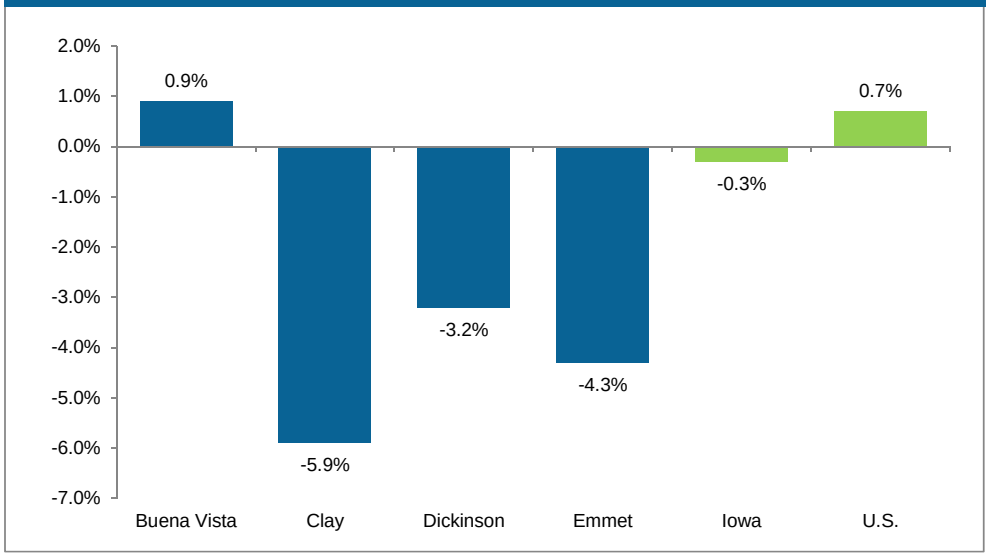
Industry	Region	Iowa	U.S.
Accommodations and Food Services	$11,647	$21,085	$22,250
Administrative and Support and Waste Management and Remediation Services	$24,459	$27,719	$39,436
Agriculture, Forestry, Fishing and Hunting	$36,837	$34,362	$40,390
Arts, Entertainment and Recreation	$11,639	$31,972	$35,097
Construction	$39,694	$50,679	$56,898
Educational Services	$25,571	$46,203	$51,411
Finance and Insurance	$54,860	$76,713	$81,678
Health Care and Social Assistance	$46,365	$51,095	$53,856
Information	$29,003	$46,498	$57,262
Management of Companies and Enterprises	$121,368	$75,758	$108,889
Manufacturing	$45,157	$52,921	$55,708
Mining, Quarrying and Oil and Gas Extraction	-	$47,035	$72,811
Other Services (except Public Administration)	$25,686	$34,272	$41,372
Professional, Scientific and Technical Services	$44,024	$64,982	$70,990
Public Administration	$49,664	$53,762	$61,085
Real Estate and Rental and Leasing	$24,451	$41,074	$43,083
Retail Trade	$23,373	$23,952	$27,845
Transportation and Warehousing	$43,887	$39,038	$54,382
Utilities	$59,551	$69,633	$84,429
Wholesale Trade	$51,367	$57,069	$54,726

Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

LABOR FORCE

Buena Vista County's labor force (those employed or actively seeking employment) grew by 0.9 percent between 2008 and 2013 (Figure 20). By percentage growth, this is higher than any of the counties in the region, the State of Iowa and the United States. The labor force decreased in all of the other counties in the region, with Clay County experiencing the greatest percentage decrease at -5.9 percent. Overall, the region experienced a 2.9 percent loss in labor force between 2008 and 2013.

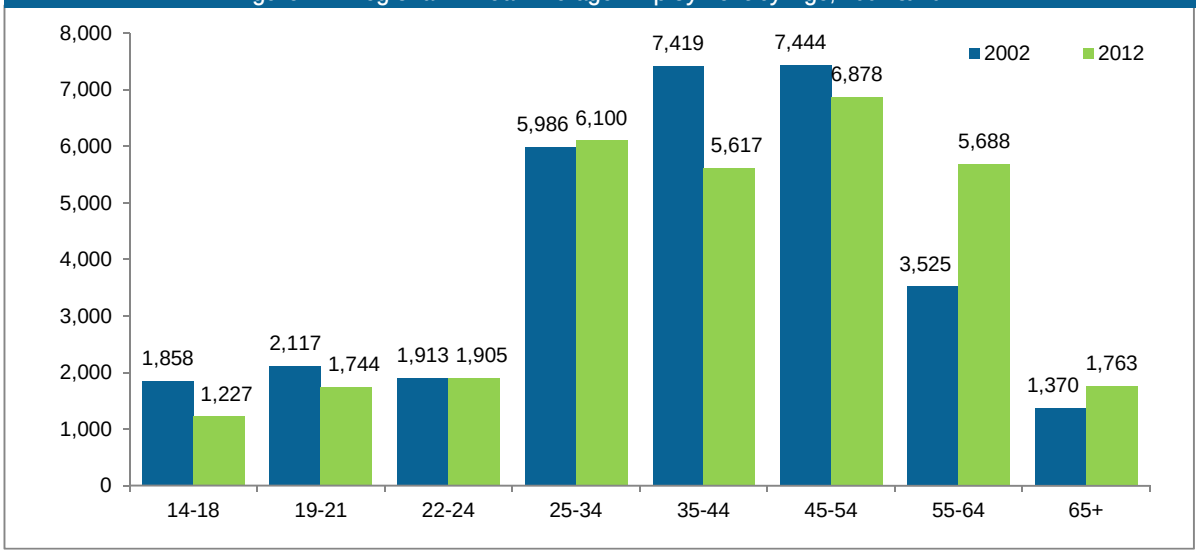
Figure 20. Labor Force Growth, 2008-2013



Source: Bureau of Labor Statistics, LAUS

From 2002 to 2012, the number of the region's jobholders age 24 and younger dropped from 5,888 to 4,876 (a decrease of 1,012 younger workers). At the other end of the spectrum, workers age 55 and older increased. There were 4,895 workers over the age of 55 in 2002 and 7,451 in 2012, an increase of 52.2 percent (Figure 21).

Figure 21. Regional Annual Average Employment by Age, 2002 & 2012

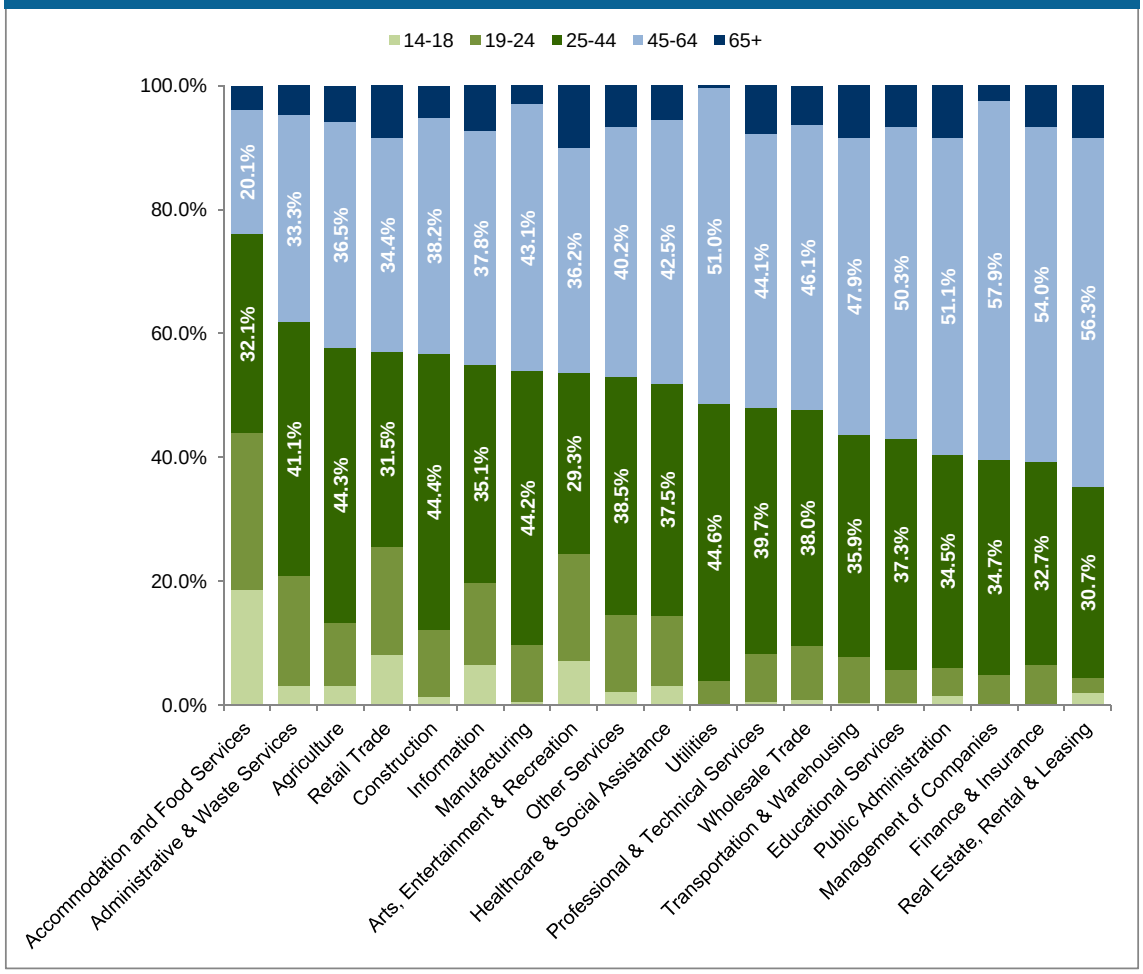


Source: Census Bureau, Local Employment Dynamics

Figure 22 illustrates the industries within the region that will be most adversely affected due to an aging workforce, with blue colors representing those 45 and older. Percentages are annotated in the figure for the 25-44 and 45-64 age groups, representing the majority of workers.

Within in this region, the real estate; finance and insurance; management of companies; public administration; educational services; transportation; wholesale trade; professional and technical services; and utilities industries each have 50.0 percent or greater of their workers aged 45 years or older. These encompass a wide variety of occupations that will each be affected by retirements within the next 20 years. In addition, the arts, entertainment and recreation industry sector contains the highest proportion of workers over 65 years of age (10.1%).

Figure 22. Industry Employment by Age Distribution, 2012



Source: Census Bureau, Local Employment Dynamics

EMERGING INDUSTRIES

Wind

According to the American Wind Energy Association (AWEA), in 2013, Iowa ranked second in the nation for wind-related jobs with 3,000-4,000. Additionally, according to AWEA, Iowa is the top state in the nation for the percentage of electricity generated by wind energy at 27.4 percent (Figure 23). Iowa is home to Acciona, a major turbine manufacturer, two key blade manufacturers, Siemens and TPI Composites, and a major tower manufacturer: Trinity Structural Towers.

Figure 23. Wind Energy

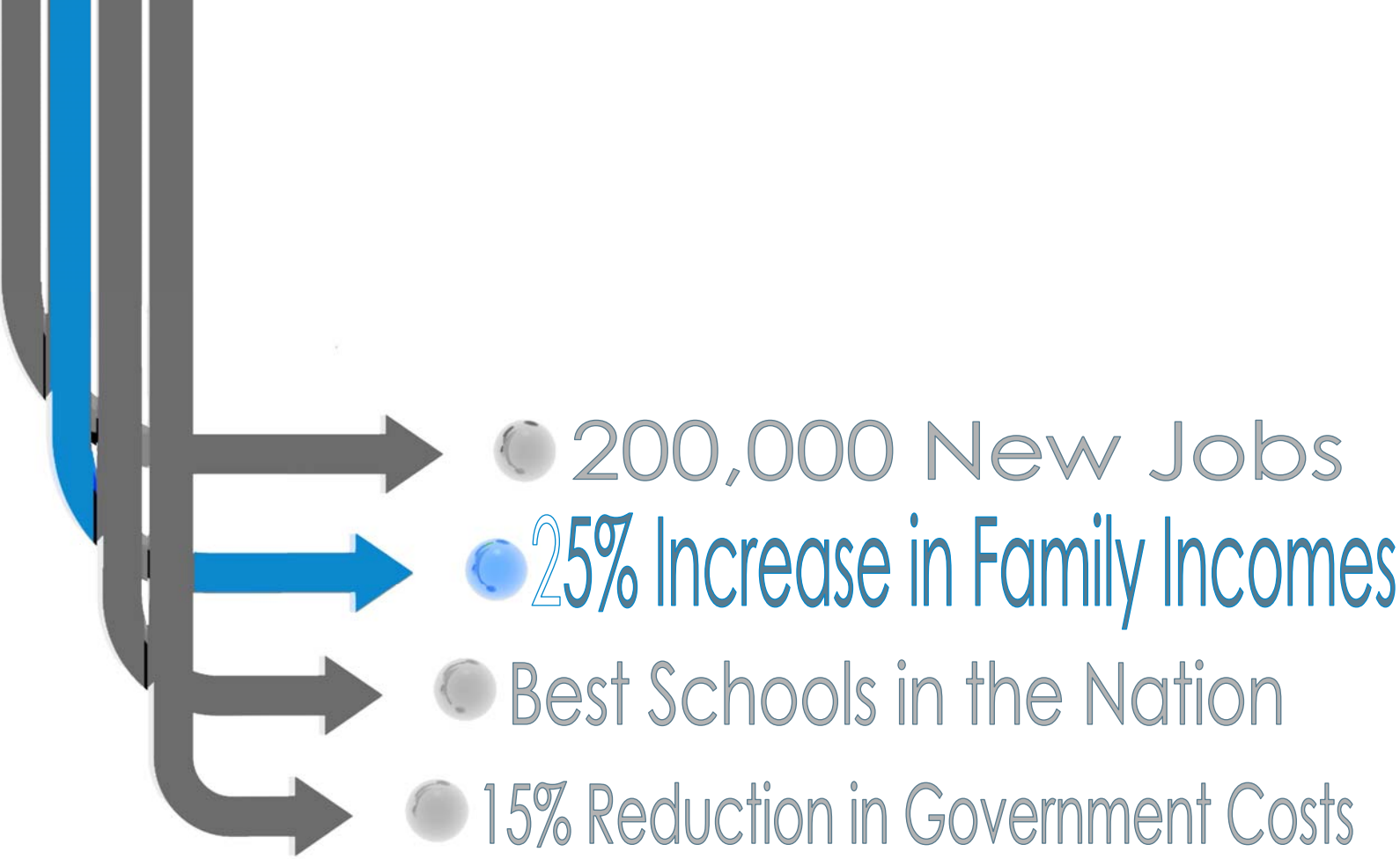
Source: American Wind Energy Association

Ethanol

According to the Renewable Fuels Association, Iowa has a current ethanol production capacity of nearly 4.0 billion gallons. This is the greatest capacity in the nation and over 2.0 billion gallons more than Nebraska, which is second in the nation for production capacity. Currently there are 42 ethanol facilities in operation across Iowa (including dry and wet mills). Both Green Plains Renewable Energy in Superior, IA (Dickinson County) and Valero Renewables in Albert City, IA (Buena Vista County) are located within this region.

Biodiesel

Biodiesel is a biodegradable, nontoxic alternative fuel that can be blended at any level with petroleum diesel. With 12 biodiesel plant locations and a production capacity of about 325 million gallons per year, Iowa is a leading state in biodiesel production.



25% INCREASE IN FAMILY INCOMES SUMMARY

- Dickinson County has a median household income ($51,885) greater than both Iowa ($50,997) and the nation ($51,371) as a whole. All other counties in the region have a median household income of less than $50,000.
- Over 50.0 percent of Dickinson County's households earn $50,000 or more per year.
- Within the region, Clay County has the highest average weekly wage at $697 in 2013, followed by Buena Vista County at $659. The statewide average weekly wage was $790.
- Dickinson County has the lowest school tax rates, while Buena Vista County has some of the highest school tax rates in the region.
- Dickinson County has both the lowest urban and rural property tax rates in the region at $3.20 and $5.04 per $1,000 of taxable value, respectively.
- All of the counties in the region have median housing values lower than the statewide median ($123,000) except for Dickinson County ($154,700).

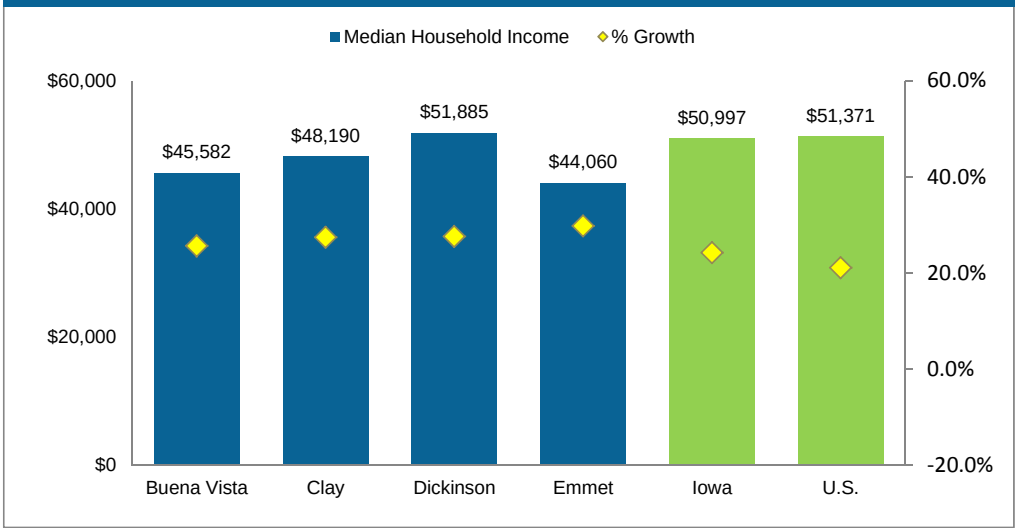
25% INCREASE IN FAMILY INCOMES

Another goal of this administration is to increase family incomes by 25 percent. This section will address current household income in Iowa as well as examine income distribution within the region. Thereafter, business climate and quality of life, including labor costs, property taxes and housing figures will be discussed.

INCOME

Iowa's 2012 median household income was $50,997 which is greater than three-fourths of the counties in this region. Dickinson County experienced significant median household income growth since 2002 (27.6%), resulting in a 2012 median household income of $51,885. Buena Vista, Clay and Emmet counties also experienced significant growth in household income during this period, however, their 2012 median household income was still less than $50,000 (Figure 24).

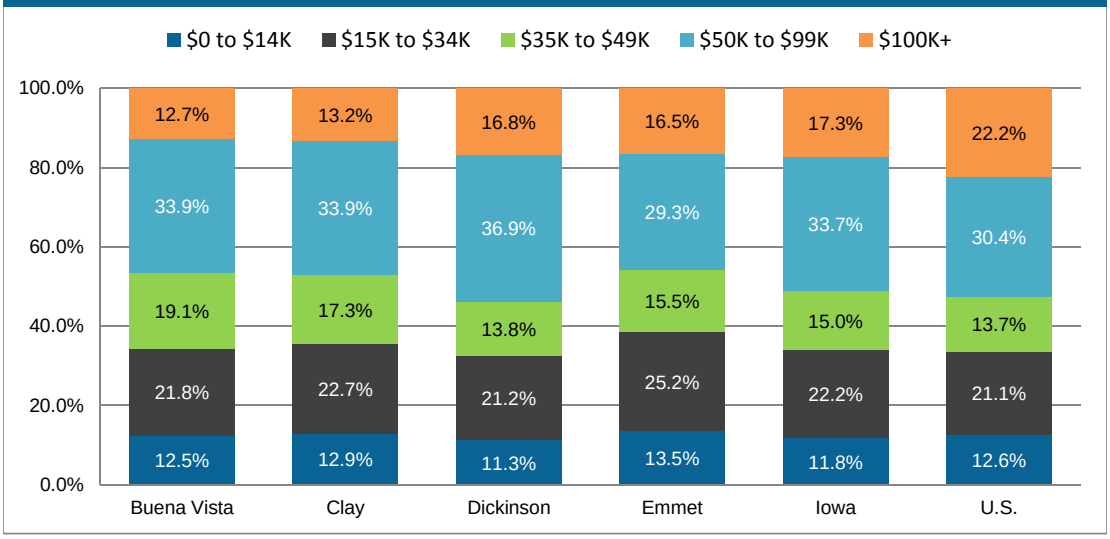
Figure 24. Median Household Income & Growth, 2002-2012



Source: Census Bureau, Small Area Income and Poverty Estimates

Figure 25 shows household income distribution in 2012 throughout the region. Dickinson County (53.7%) had over 50.0 percent of their households earning $50,000 or more per year. Clay County follows closely with 47.1 percent of their households earning $50,000 or more per year. Emmet County had the greatest percentage (25.2%) in the region of households earning $15,000-$34,000 per year.

Figure 25. Income Distribution, 2012

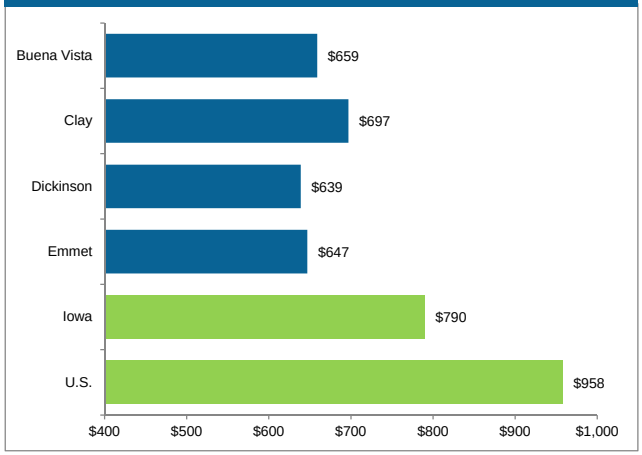


Source: Census Bureau, 2012 ACS

LABOR COSTS

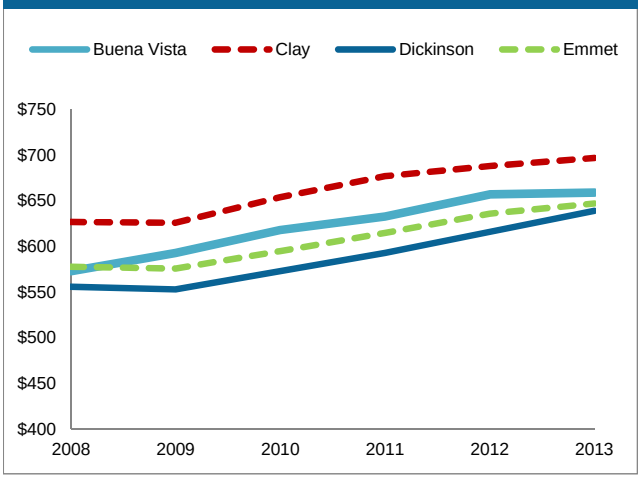
In 2013, average weekly wages ranged from $639 to $697 in the counties of this region. Dickinson and Emmet counties had the lowest average weekly wage and Clay County had the highest (Figure 26). In general, the counties' wages have grown steadily in the region since 2008 (Figure 27).

Figure 26. Average Weekly Wages, 2013



Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

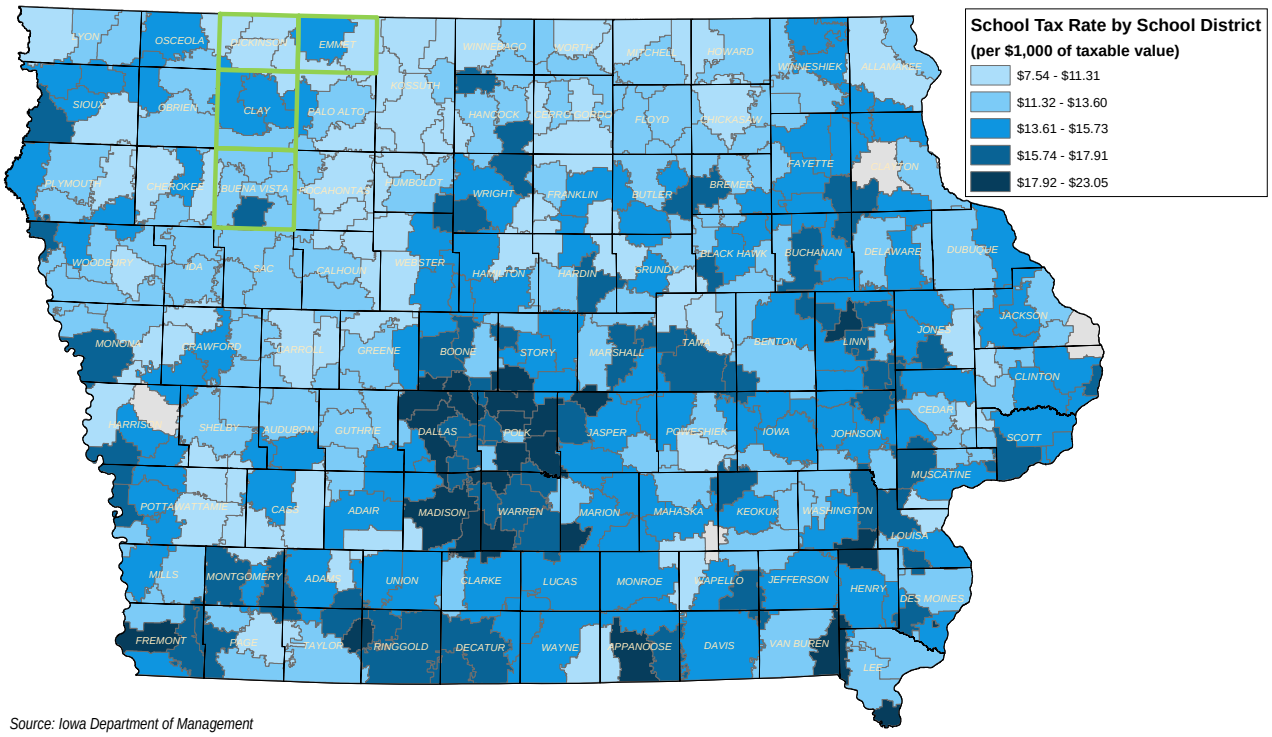
Figure 27. Average Weekly Wage Growth, 2008-2013



Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

PROPERTY TAXES

Figure 28. Iowa School Tax Rates by School District, FY 2014

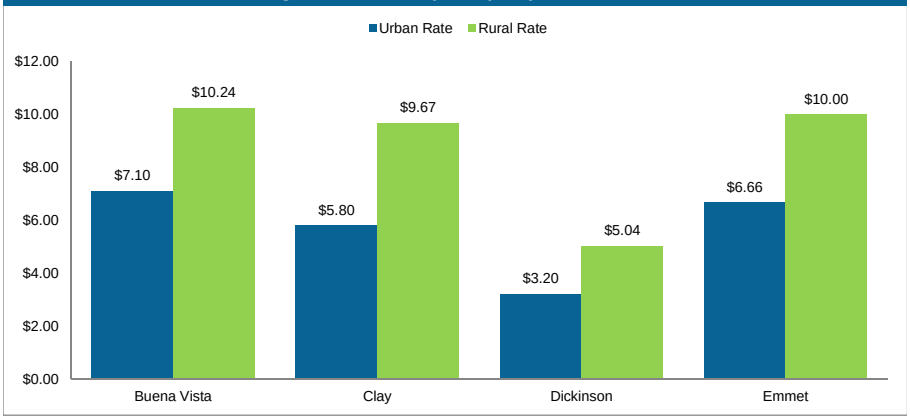


Source: Iowa Department of Management

Figure 28 (above) illustrates the 2014 fiscal year school tax rates by school district for the State of Iowa. School taxes in this region vary greatly. Dickinson County has the lowest school tax rates in the region ranging from the Okoboji school district at $7.54 per $1,000 of taxable property value to the Harris-Lake Park school district at $10.80. Storm Lake school district in Buena Vista County has the highest school tax rate in the region at $15.92 per $1,000 of taxable property value.

Figure 29 shows the county property tax rates for the region for fiscal year 2013/2014. Buena Vista County had both the highest urban and rural tax rates in the region, with $7.10 and $10.24 per $1,000 of taxable property value, respectively. Dickinson County had both the lowest urban and rural county property taxes in the region, with $3.20 and $5.04 per $1,000 taxable property value, respectively.

Figure 29. County Property Tax Rates

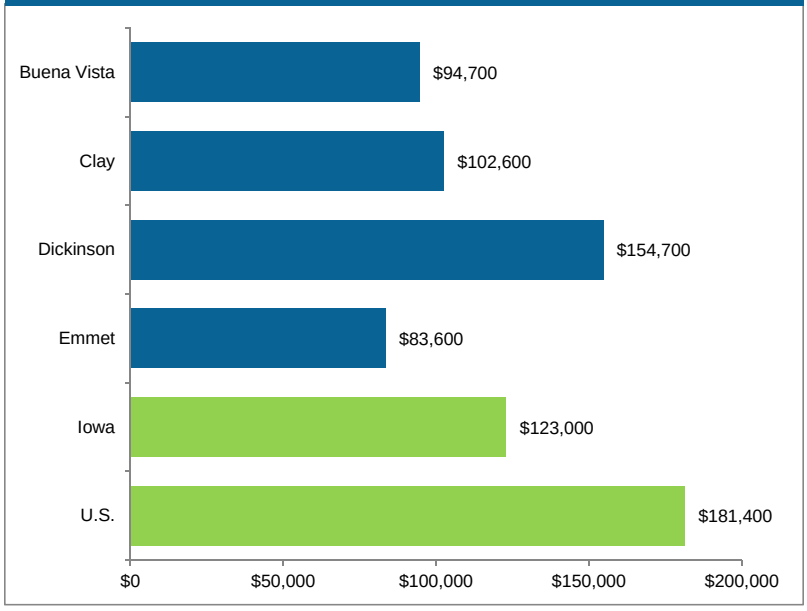


Source: Iowa Department of Management

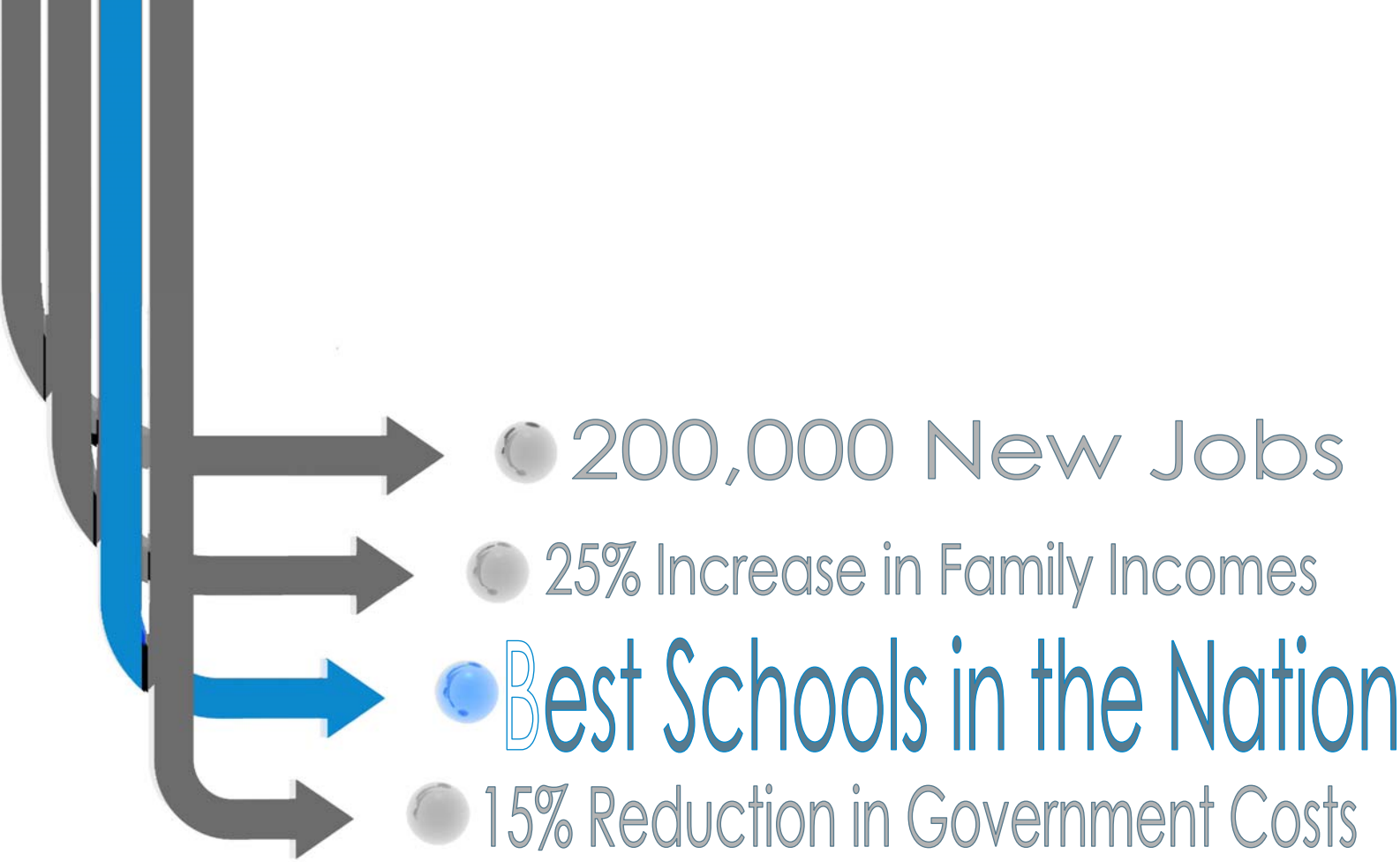
HOUSING

As of 2012, Iowa's median home value of $123,000 was $58,400 less than the U.S. median home value of $181,400. Regionally, median housing values are generally low. Buena Vista, Clay and Emmet counties each had a median home value less than the State of Iowa (Figure 30). However, Dickinson County had a median housing value of $154,700 which was $31,700 greater than the median statewide value.

Figure 30. Median Housing Values



Source: Census Bureau, 2012 ACS



BEST SCHOOLS IN THE NATION SUMMARY

- Both Clay and Dickinson counties had a greater percentage of fourth and eighth graders proficient in math than the State as a whole in 2013.
- Dickinson County had the highest graduation rate for 2013 among the counties in the region at 94.4%. The statewide graduation rate was 89.7 percent.
- K-12 enrollment in the region is projected to increase by 5.2 percent between 2014 and 2019.
- Three of the four counties in the region had a higher average ACT composite score than either the State (22.1) or the nation (20.9) in 2013.
- Within the region, only Dickinson County exceeded Iowa's percentage (25.3%) of those that have an undergraduate degree or higher.
- Only Clay and Dickinson counties, within this region, experienced an increase in the percentage of population 25 years or older with an undergraduate degree or higher between 2011 and 2012.
- Clay County had the greatest number of NCRC holders in the region at 305, followed by Dickinson County at 232 (April 2009-May 2014).

BEST SCHOOLS IN THE NATION

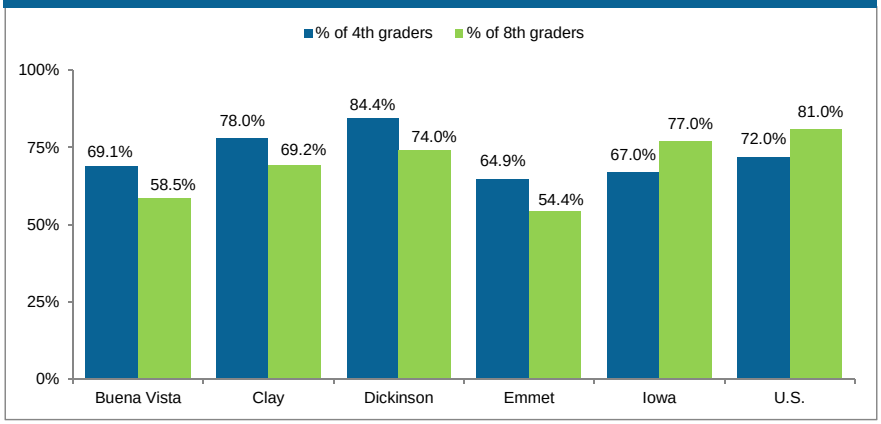
A continuing goal of this administration is to establish Iowa as a national leader in quality of education. This section includes indicators of the region's rankings compared to the State of Iowa and nation as a whole regarding education.

K-12 PROGRAMS

Figures 31 and 32 illustrate the proficiency in both reading and mathematics for students in the region, the State and the nation, with measurements taken in fourth and eighth grades in 2013.

The percentage of students proficient in reading in this region ranges from 84.4 percent of fourth graders in Dickinson County to 54.4 percent of eighth graders in Emmet County. Emmet County had the lowest percentage of proficient reading students in the region for both grade levels. Each county in the region experienced a drop in the proportion of proficient reading students from fourth to eighth grade. This is the opposite of both the State and the nation which experienced a percentage increase in proficient students from fourth to eighth grade (Figure 31).

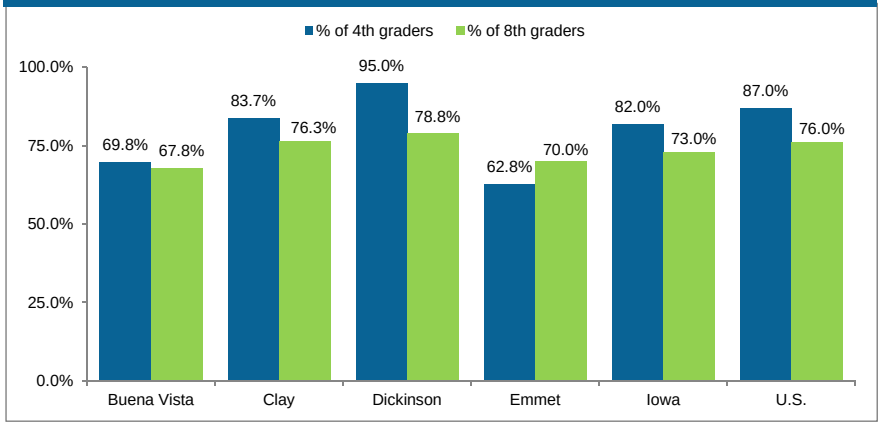
Figure 31. Reading Proficiency, 2013



Source: Iowa Department of Education & National Center for Education Statistics

In general, there was less variance in math proficiency between grade levels than there was in reading proficiency. Within the region, Dickinson County had the highest percentage of proficient math students in the region for both grade levels; however, Emmet County the only county to experience an increase in the proportion of proficient math students from fourth to eighth grade (Figure 32).

Figure 32. Math Proficiency, 2013



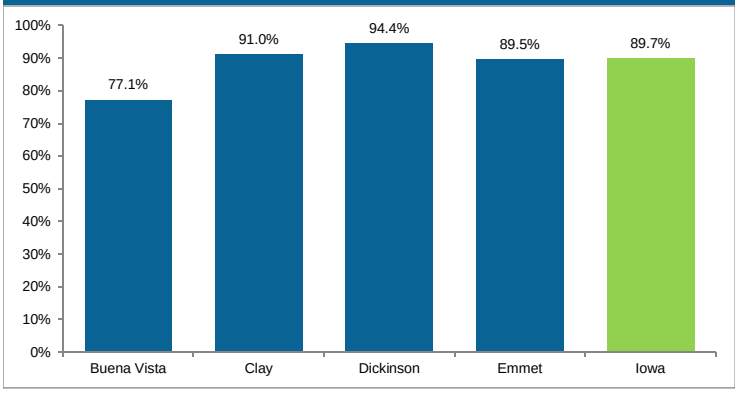
Source: Iowa Department of Education & National Center for Education Statistics

The K-12 education systems in the region generally have a very high success rate when it comes to preparing their students for graduation. **Figure 33** shows the class of 2013 high school graduation rate for each of the counties in the region, as well as the State. Half of the counties in the region surpass the statewide rate of 89.7 percent, with Dickinson County having the highest graduation rate in the region at 94.4 percent.

Figure 34 illustrates K-12 enrollment levels for the counties in the region. The percentages in the bars express the counties' enrollment as a percentage of their total population. Buena Vista County had the highest enrollment in the region, with 4,232 students enrolled in the 2013-14 academic year. Emmet County had the lowest enrollment, with 1,628 students. However, Emmet County also has the smallest population in the region, and as a percentage of total population, their enrollment for 2013-14 is the second highest when compared to the rest of the region. Overall, K-12 enrollment increased by 0.5 percent in the region between the 2004 and 2014 school years, compared to a 0.7 percent decrease in total population.

Looking toward the future, **Figure 35** shows the projected change in K-12 enrollment throughout the region. For this purpose, the certified enrollment of the 2013-14 school year is compared to the projected enrollment for the 2018-19 school year, as estimated by the Iowa Department of Education. Half of the counties in the region are projected to have increases in K-12 enrollment. Buena Vista County is expected to see the greatest increase in enrollment during this time period with a projected change of 13.7 percent (representing an estimated 542 students). Emmet County is projected to experience a 1.9 percent decrease in enrollment for an estimated loss of 31 students. Overall, enrollment in the region is projected to increase by 5.2 percent between 2014 and 2019.

Figure 33. Class of 2013 Graduation Rates

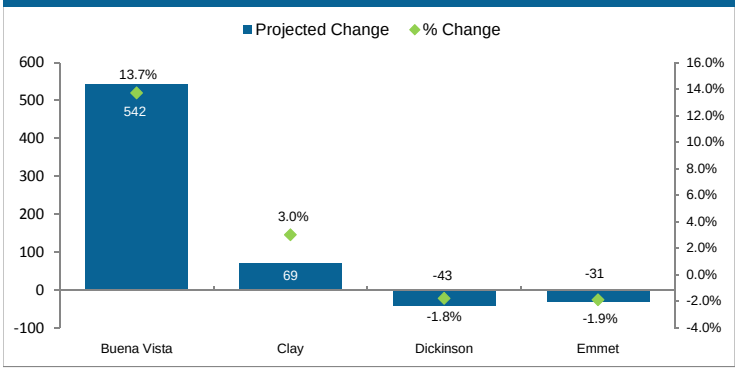


Source: Iowa Department of Education

Figure 34. K-12 Enrollment

Source: Iowa Department of Education

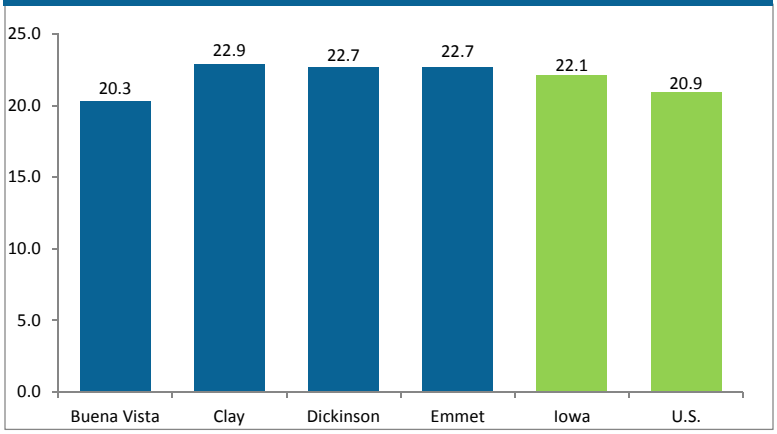
Figure 35. Projected Change in K-12 Enrollment 2014-2019



Source: Iowa Department of Education

Figure 36 illustrates average composite ACT scores for the region, Iowa and the nation. ACT composite scores range from one to 36. These scores are a combination of four subject areas; English, mathematics, reading and science. In 2013, three of the four counties in the region had a higher average composite score than both the State (22.1) and national (20.9) average. Buena Vista County, however, had a lower average score than the nation with an average score of 20.3.

Figure 36. Average Composite ACT Scores, 2013

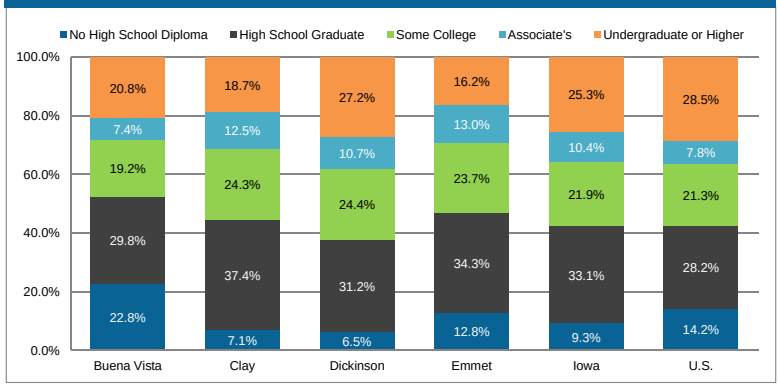


Source: Iowa Department of Education

EDUCATIONAL ATTAINMENT

Figure 37 represents the educational attainment for the counties in the region of those over 25 years of age. Within the region, only Dickinson County (27.2%) exceeds Iowa's percentage (25.3%) of those that have an undergraduate degree or higher. There is a high percentage of those 25 years of age and older that have not earned a high school diploma, GED or HiSET in Buena Vista County (22.8%).

Figure 37. Educational Attainment, 2012

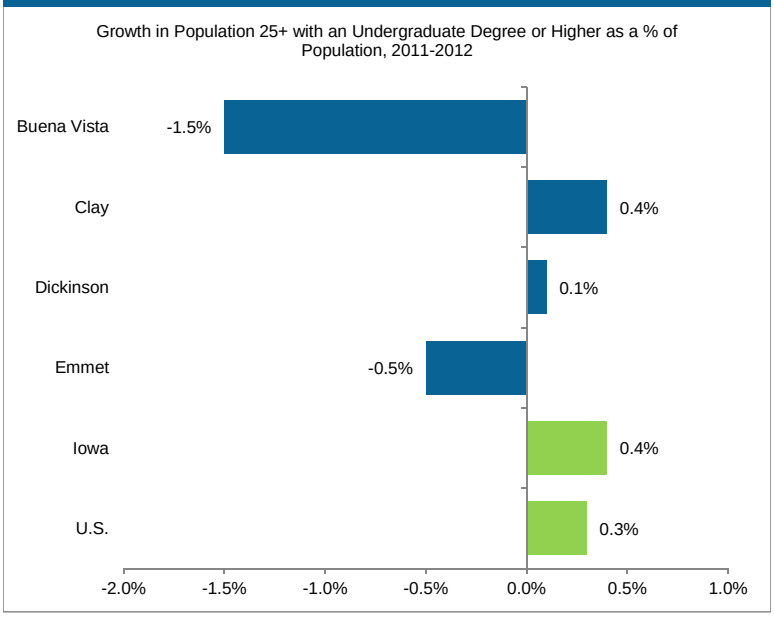


Source: Census Bureau, 2012 ACS

When analyzing the population of those 25 years and older with an undergraduate degree or higher, Clay (0.4%) and Dickinson (0.1%) counties lead the region in growth rates, from 2011 to 2012; an estimated increase of 56 and 53 individuals, respectively (Figure 38). Both Buena Vista (-1.5%) and Emmet (-0.5%) counties experienced decreases in population 25 years of age and older with an undergraduate degree or higher between 2011 and 2012; an estimated loss of 160 and 46 individuals.

Overall, from 2011 to 2012, the region saw a 1.0 percent decrease in population or an estimated loss of 97 individuals aged 25 years or older with an undergraduate degree or higher.

Figure 38. Growth in Educational Attainment Undergraduate Degree or Higher

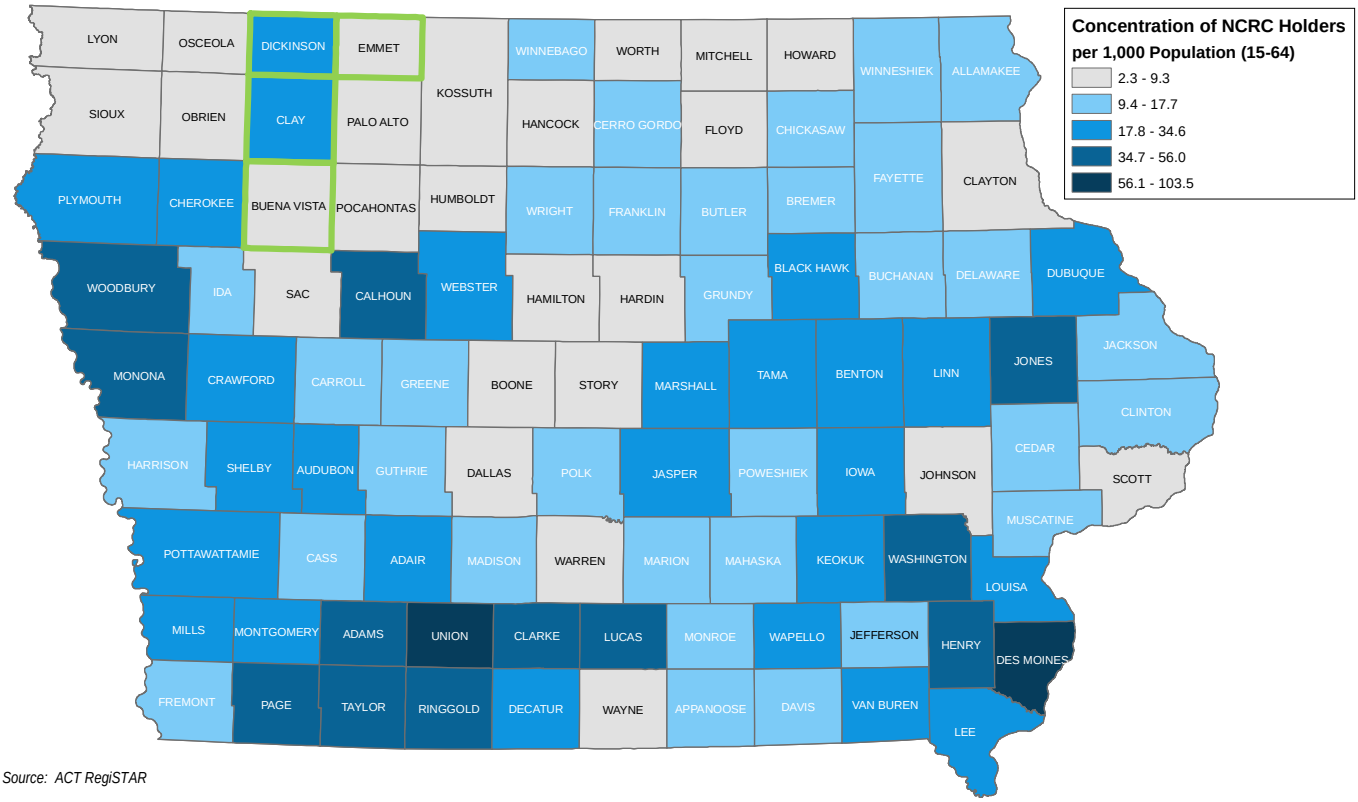


Source: Census Bureau, 2012 ACS

SKILLED IOWA AND THE NATIONAL CAREER READINESS CERTIFICATE

The Skilled Iowa Initiative is a program that endeavors to provide assurances to employers that their local workforce has the necessary skills to fill job openings. The initiative promotes National Career Readiness Certificate (NCRC) testing to potential job seekers. The NCRC is a portable, nationally recognized credential that offers employers a measure of potential employees' foundational skills. Candidates that take the NCRC assessment are tested in three areas: applied mathematics, locating information and reading for information. Based on their scores the test taker could earn a certificate in one of four levels: platinum, gold, silver or bronze.

Figure 39. NCRC Holders by County of Residence (per 1,000 Population), April 2009-May 2014

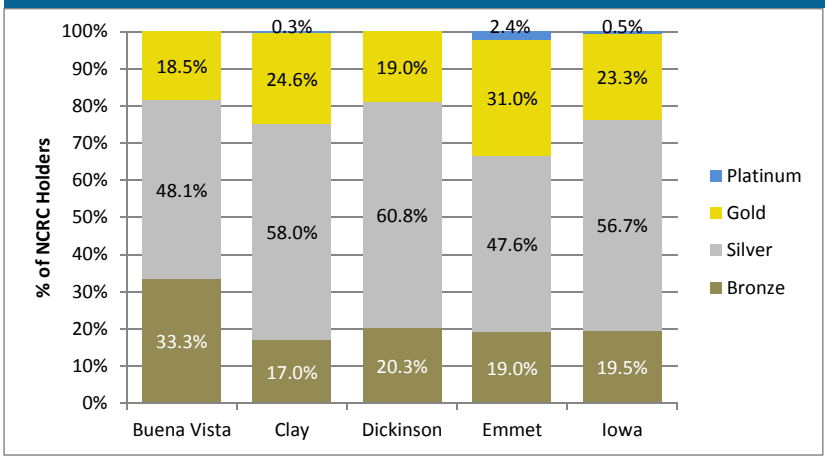


Source: ACT RegiSTAR

In Iowa, between April 2009 and May 2014, NCRCs were earned by over 41,500 people. **Figure 39**, above, shows the distribution of NCRC holders based on their county of residence at the time they took the test as a proportion of the total population (between ages 15-64). Within this region, 633 people earned an NCRC during this time period with Clay County having the greatest number of certificate holders at 305, followed by Dickinson County at 232. Buena Vista (54) and Emmet (42) counties had substantially fewer certificate holders.

A majority of those who earned an NCRC, earned one at the silver level (**Figure 40**). The distribution of certificate levels throughout this region is fairly uniform. However, Buena Vista County had a significantly greater percentage of bronze certificate level earners (33.3%) than did any other county in the region. In addition, Both Clay and Emmet counties each had one platinum certificate holder.

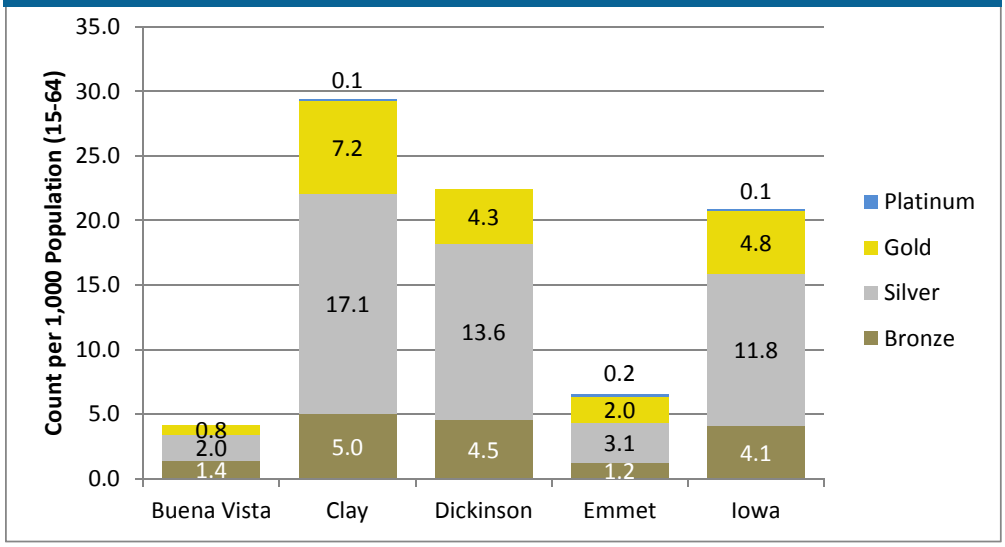
Figure 40. Proportion of Certificate Levels, April 2009-May 2014



Source: ACT RegiSTAR

Figure 41, below, reflects the number of NCRC holders per 1,000 residents (ages 15-64) by certificate level earned for each county in the region along with the State as a whole. Clay County had the greatest proportion of residents that had earned the credential at 29.4 per 1,000 population. Dickinson County had the next highest in the region at 22.4. Buena Vista and Emmet counties each had less than 10 certificate holders per 1,000 residents.

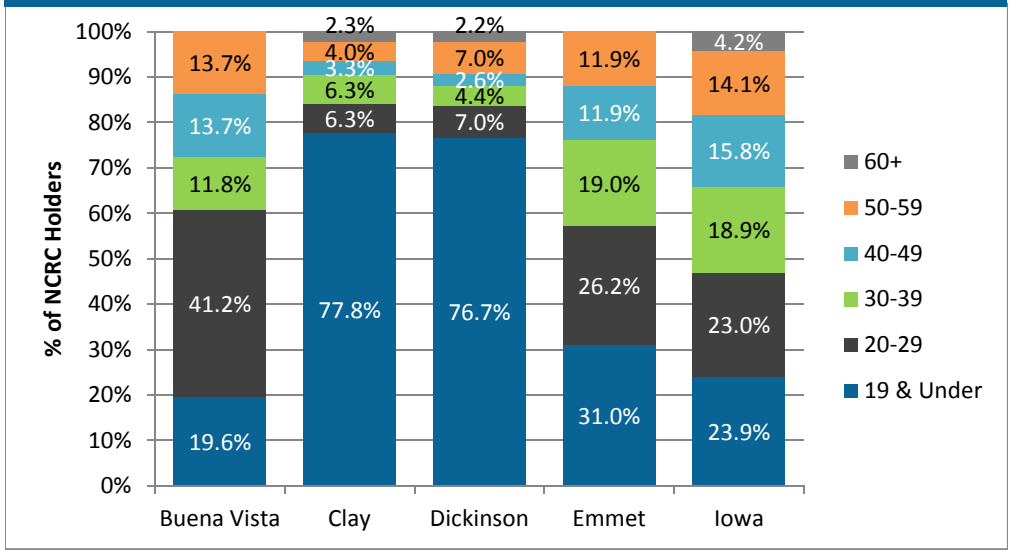
Figure 41. NCRC Holders per 1,000 Population by Certificate Level



Source: ACT RegiSTAR

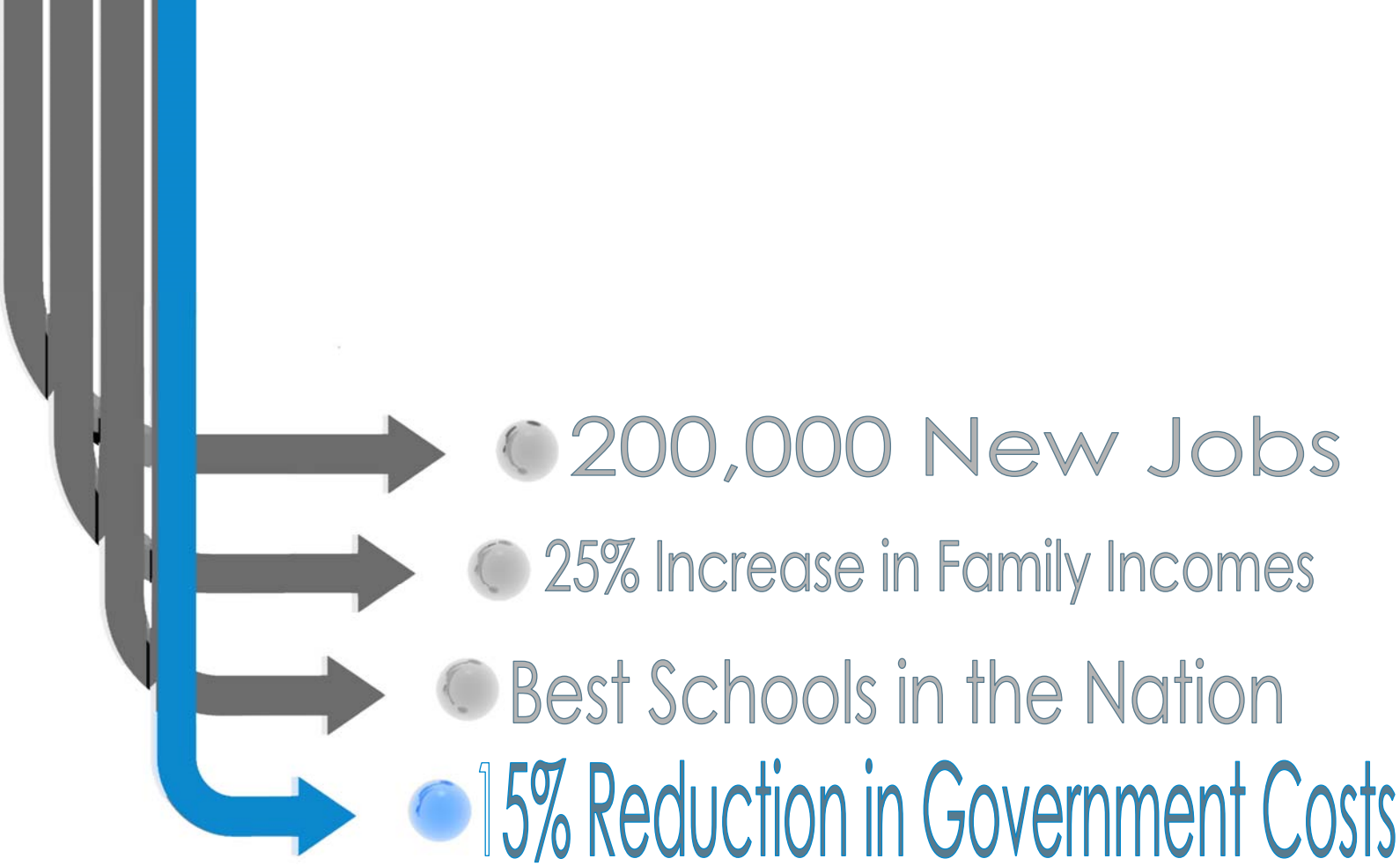
Figure 42, below, breaks down by age group the percentage of NCRC holders for each county in the region as well as for the State as a whole. Clay County, which had the greatest number of NCRC holders in the region (305), had a majority (77.8%) of its recipients within the 19 and under age bracket. Similarly, Dickinson County, with 232 total NCRC holders, had a significant proportion of its certificate recipients aged 19 and under (76.7%). Certificate holders in both Buena Vista and Emmet counties were fairly evenly distributed among the age brackets with slightly higher proportions within the 19 and under and 20 to 29 age groups.

Figure 42. Percentage of NCRC Holders by Age



Source: ACT RegiSTAR

For more information on the Skilled Iowa Initiative visit www.skillediowa.org.



15% REDUCTION IN GOVERNMENT COSTS SUMMARY

- In 2012, there were 132 state government full-time employees to every 10,000 residents in the State of Iowa.
- Clay County has the highest proportion of its workforce employed by the State in the region (1.2%).
- From fiscal years 2003 to 2013 there was a 15.2 percent increase in the number of full-time state government employees in Iowa.
- Overall, expenses for governmental activities in Iowa decreased by 0.5 percent in fiscal year 2013.

15% REDUCTION IN GOVERNMENT COSTS

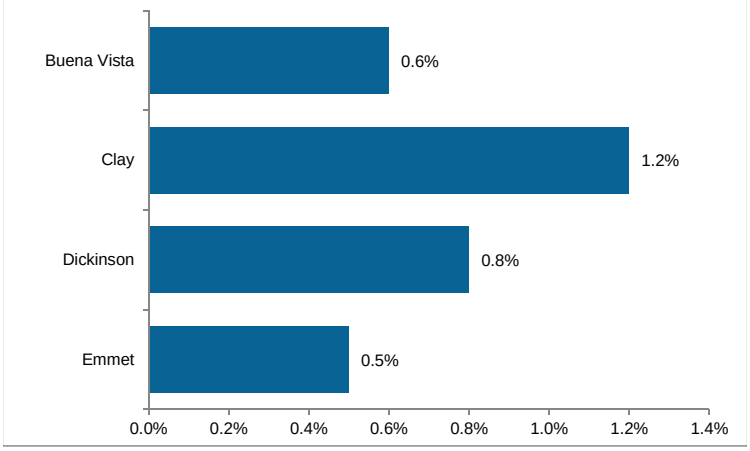
Lastly, another major objective of this administration is to reduce the cost of government by 15 percent. This will include the use of new technologies and efficiencies allowing governmental savings.

STATE GOVERNMENT EMPLOYMENT

According to the Census Bureau's *Annual Survey of Public Employment and Payroll*, in 2012, there were approximately 132 full-time state government employees per 10,000 residents in Iowa. During fiscal year 2013, nearly three-fifths (59.0%) of Iowa's full-time state employees were employed within Iowa's Board of Regents. The remaining 41.0 percent were non-Regent employees. Of these, the majority were employed within the human services, corrections or transportation departments. From fiscal years 2003 to 2013 there has been a 15.2 percent increase in the total number of full-time State employees.

Figure 43 illustrates the percentage of the workforce employed by State government for each county in the region in 2013. Clay County had the highest proportion of its workforce employed by the State (1.2%), followed by Dickinson County (0.8%). Within the region, Emmet County had the lowest proportion of its workforce employed by the State with only 0.5 percent.

Figure 43. Percentage of Workforce Employed by State Government



Source: Bureau of Labor Statistics, QCEW: 2013 preliminary data

In regards to total full-time employee positions, the Board of Regents' personnel costs comprise nearly three-fifths (57.4%) of the total for State government. The total personnel cost of the Board of Regents has increased from $1.52 billion in fiscal year 2003 to $2.52 billion in fiscal year 2013, an average annual increase of 5.3 percent. The total cost of the non-Regents agencies has increased from $1.28 billion in fiscal year 2003 to $1.87 billion in fiscal year 2013, representing an average annual increase of 4.0 percent (Figure 44).

Figure 44. Personnel Costs per Fiscal Year, 2003 2013 (Dollars in Millions)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Board of Regents	$1,516.2	$1,651.0	$1,677.9	$1,754.3	$1,857.3	$1,993.3	$2,155.2	$2,095.3	$2,124.4	$2,243.9	$2,516.0
Non-Regents											
Human Services	$263.2	$284.6	$299.8	$325.1	$349.9	$377.5	$400.1	$391.4	$379.2	$387.4	$396.3
Other	263.7	288.5	308.4	320.3	335.4	366.7	384.6	374.2	378.8	389.4	392.6
Corrections	218.5	237.3	243.8	261.9	279.3	306.8	317.4	307.3	309.9	311.0	319.1
Transportation	177.7	191.0	196.9	208.1	214.7	225.4	234.2	232.4	229.0	235.0	236.4
Judicial Branch	106.7	112.5	113.5	123.9	132.9	140.2	145.7	144.0	146.8	148.6	152.4
Natural Resources	59.9	61.3	63.6	67.7	73.3	79.5	84.7	83.5	85.9	89.3	91.7
Public Safety	56.7	61.7	64.9	69.2	73.3	48.3	82.8	80.1	80.4	84.3	86.2
Workforce Development	43.1	50.0	51.1	53.3	54.8	59.9	64.2	64.8	64.4	68.0	69.6
Education	41.2	45.3	47.7	50.9	53.8	59.4	61.5	60.8	59.4	61.2	63.3
Veterans Affairs	44.5	48.4	49.1	51.8	52.7	57.4	60.0	65.1	66.9	63.9	62.4
Subtotal Non-Regents	$1,275.2	$1,380.6	$1,438.8	$1,532.2	$1,620.1	$1,721.1	$1,835.2	$1,803.6	$1,800.7	$1,838.1	$1,870.0
Total	$2,791.4	$3,031.6	$3,116.7	$3,286.5	$3,477.4	$3,714.4	$3,990.4	$3,898.9	$3,925.1	$4,082.0	$4,386.0

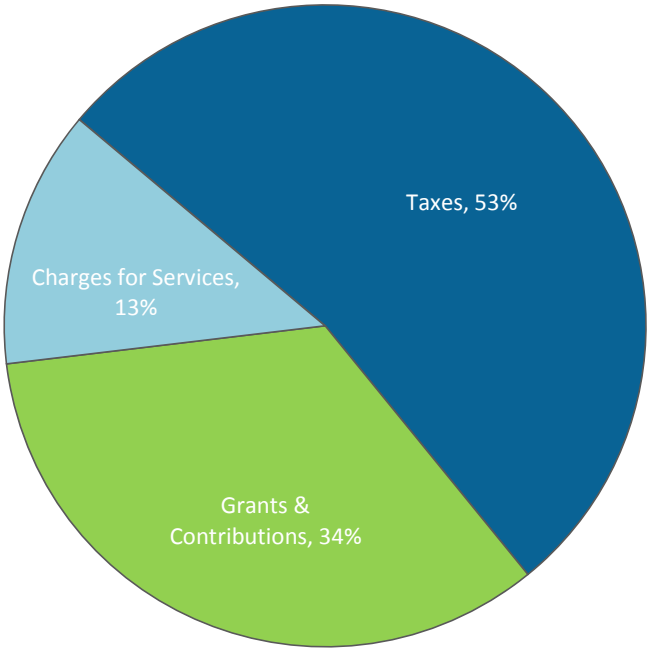
Source: Legislative Services Agency, Fiscal Services Division

STATE GOVERNMENT ACTIVITIES

Iowa's government-wide financial statements are designed to provide a broad overview of the State's financial activity. The government-wide financial statements of the State are divided into three categories: governmental activities, business -type activities and component units. This section focuses on governmental activities which center on services generally associated with State government, such as: administration and regulation; education; health and human rights; human services; justice and public defense; economic development; transportation; and agriculture and natural resources.

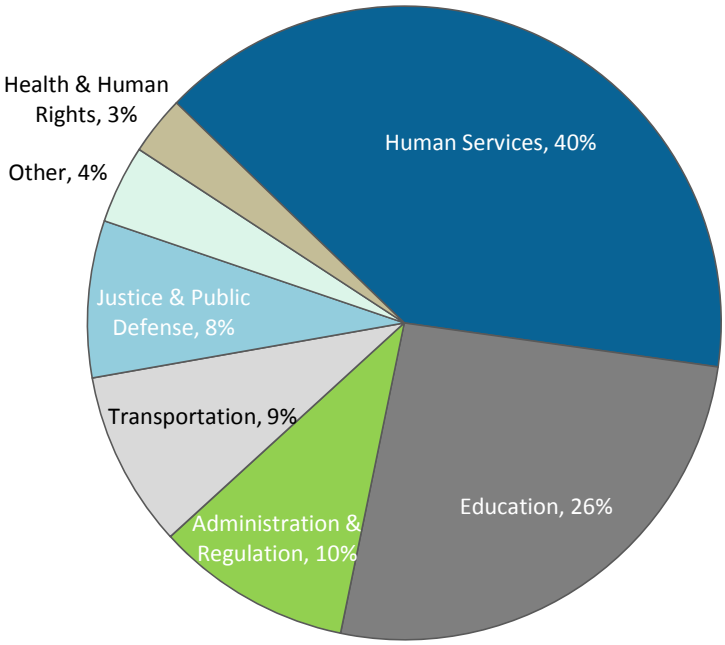
First, Figure 45, to the right, breaks down Iowa's revenue sources as delineated by Iowa Department of Administrative Service's *Comprehensive Annual Financial Report*, for fiscal year 2013. Over half (53.0%) of the State's revenue came from taxes. This is a percentage increase of 2.0 over fiscal year 2012. This can be attributed, in part, to a 13.4 percent increase in personal income tax revenue and a 2.3 percent increase in sales and use tax revenue during this time period.

Figure 45. Iowa Revenues by Source, FY 2013



Source: Iowa Department of Administrative Services, State Accounting Enterprise

Figure 46. Iowa Expenses by Function, FY 2013



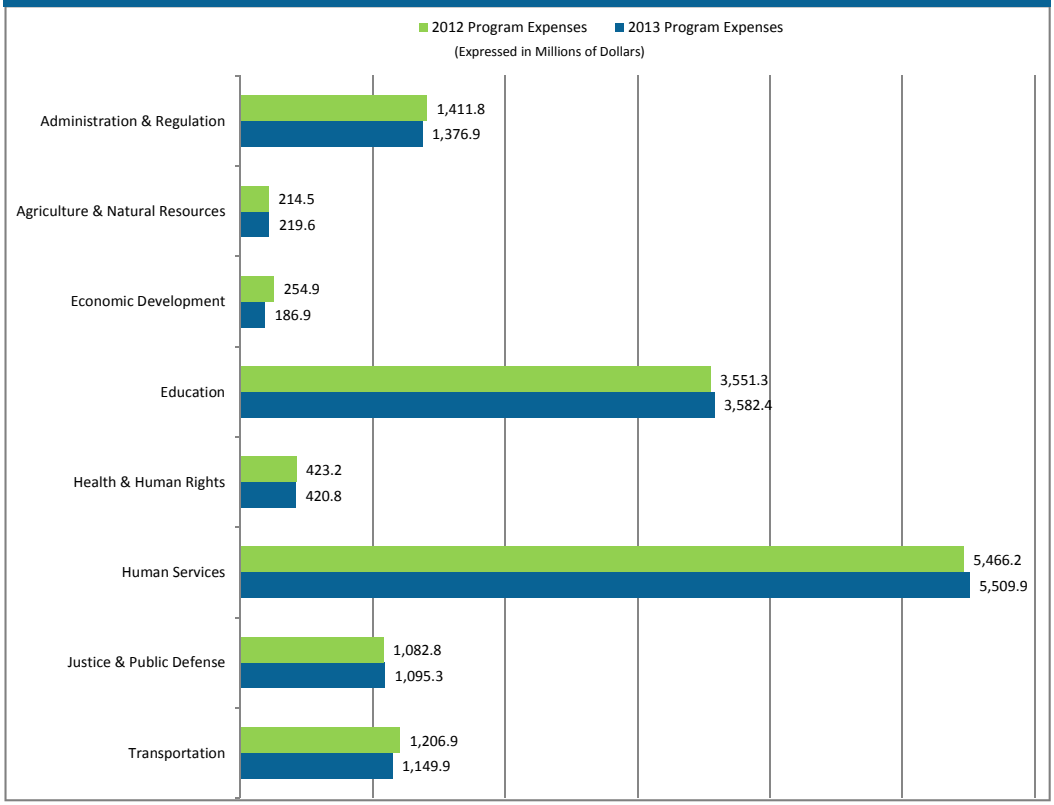
Source: Iowa Department of Administrative Services, State Accounting Enterprise

Figure 46, above, shows the State of Iowa's expenses by function. The human services (40.0%) and education (26.0%) functions account for the majority of expenses in 2013. The overall percentage breakout of expenses for 2013 mirrors the 2012 breakout.

The cost of all governmental activities for fiscal year 2013 was $13.64 billion. This is a decrease of $72,400 dollars over fiscal year 2012. Overall, expenses for governmental activities decreased by 0.5 percent in 2013.

Figure 47 depicts the change in total program expenses between fiscal year 2012 and 2013. Expenses decreased most significantly in economic development (26.7%) and transportation (4.7%). The decrease in economic development expenses of $68.0 million is partially a result of a $48.4 million reduction in state aid for economic development related projects and a $17.3 million reduction of American Recovery and Reinvestment Act (ARRA) related expenses for workforce development. In addition, the decrease in transportation expenses of $57.0 million was largely due to the reduction in spending of federal highway planning and construction funds.

Figure 47. Program Expenses, FY 2012-2013



Source: Iowa Department of Administrative Services, State Accounting Enterprise

APPENDIX

Industry clusters used in this report are Traded Clusters as defined by the following source:
Delgado, M., M.E. Porter, and S. Stern (2013), "Defining Clusters of Related Industries."
Further details on methodology is available at http://clustermapping.us/content/cluster-mapping-methodology.

There are 51 Traded Clusters comprised of 778 industries (6-digit NAICS, 2007 codes). The following pages breakout each Traded Cluster by the industries they encompass. The clusters are listed in alphabetical order.

Aerospace Vehicles and Defense

Number of industries: 7

Description: Establishments in this cluster manufacture aircraft, space vehicles, guided missiles, and related parts. This cluster also contains firms that manufacture the necessary search and navigation equipment used by these products.

NAICS	NAICS Name
336411	Aircraft Manufacturing
336412	Aircraft Engine and Engine Parts Manufacturing
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing
336414	Guided Missile and Space Vehicle Manufacturing
336415	Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing
336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing

Agricultural Inputs and Services

Number of industries: 9

Description: This cluster includes establishments primarily engaged in farming and related services. Farming includes soil preparation, planting, cultivation, harvest, fertilizer creation, and post-harvest activities. It also includes services that supply farm labor, support for animal production, and additional operations management.

NAICS	NAICS Name
115111	Cotton Ginning
115112	Soil Preparation, Planting, and Cultivating
115113	Crop Harvesting, Primarily by Machine
115114	Postharvest Crop Activities (except Cotton Ginning)
115210	Support Activities for Animal Production
115115	Farm Labor Contractors and Crew Leaders
115116	Farm Management Services
325311	Nitrogenous Fertilizer Manufacturing
325314	Fertilizer (Mixing Only) Manufacturing

Apparel

Number of industries: 21

Description: The establishments in this cluster are focused on manufacturing clothing and fabric accessories (for example, hats, gloves, and neckties) for men, women, and children.

NAICS	NAICS Name
314999	All Other Miscellaneous Textile Product Mills
315291	Infants' Cut and Sew Apparel Manufacturing
315292	Fur and Leather Apparel Manufacturing
315299	All Other Cut and Sew Apparel Manufacturing
315991	Hat, Cap, and Millinery Manufacturing
315992	Glove and Mitten Manufacturing
315993	Men's and Boys' Neckwear Manufacturing
315999	Other Apparel Accessories and Other Apparel Manufacturing
315211	Men's and Boys' Cut and Sew Apparel Contractors
315221	Men's and Boys' Cute and Sew Underwear and Nightwear Manufacturing
315222	Men's and Boys' Cut and Sew Suit, Coat, and Overcoat Manufacturing
315223	Men's and Boys' Cut and Sew Shirt (except Work Shirt) Manufacturing
315224	Men's and Boys' Cut and Sew Trouser, Slack, and Jean Manufacturing
315225	Men's and Boys' Cut and Sew Work Clothing Manufacturing
315228	Men's and Boys' Cut and Sew Other Outerwear Manufacturing
315212	Women's and Girls', and Infants' Cut and Sew Apparel Contractors
315231	Women's and Girls' Cut and Sew Lingerie, Loungewear, and Nightwear Manufacturing
315232	Women's and Girls' Cut and Sew Blouse and Shirt Manufacturing
315233	Women's and Girls' Cut and Sew Dress Manufacturing
315234	Women's and Girls' Cut and Sew Suit, Coat, Tailored Jacket, and Skirt Manufacturing
315239	Women's and Girls' Cut and Sew Other Outerwear Manufacturing

Automotive

Number of industries: 26

Description: This cluster includes establishments along the value chain that are necessary for manufacturing cars, trucks, and other motorized land-based transportation equipment (other than motorcycles). This includes metal mills and foundries, manufacturers of metal automotive parts, and manufacturers of completed automobiles.

NAICS	NAICS Name
332114	Custom Roll Forming
336311	Carburetor, Piston, Piston Ring, and Valve Manufacturing
336321	Vehicular Lighting Equipment Manufacturing
336322	Other Motor Vehicle Electrical and Electronic Equipment Manufacturing
336330	Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing
336340	Motor Vehicle Brake System Manufacturing
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing
336360	Motor Vehicle Seating and Interior Trim Manufacturing
336391	Motor Vehicle Air-Conditioning Manufacturing
336399	All Other Motor Vehicle Parts Manufacturing
336312	Gasoline Engine and Engine Parts Manufacturing
336111	Automobile Manufacturing
336112	Light Truck and Utility Vehicle Manufacturing
336120	Heavy Duty Truck Manufacturing

Automotive, Continued

NAICS	NAICS Name
336211	Motor Vehicle Body Manufacturing
336370	Motor Vehicle Metal Stamping
336999	All Other Transportation Equipment Manufacturing
336992	Military Armored Vehicle, Tank, and Tank Component Manufacturing
331511	Iron Foundries
331512	Steel Investment Foundries
331513	Steel Foundries (except Investment)
331521	Aluminum Die-Casting Foundries
331522	Nonferrous (except Aluminum) Die-Casting Foundries
331524	Aluminum Foundries (except Die-Casting)
331525	Copper Foundries (except Die-Casting)
331528	Other Nonferrous Foundries (except Die-Casting)

Biopharmaceuticals

Number of industries: 4

Description: Establishments in this cluster produce complex chemical and biological substances used in medications, vaccines, diagnostic tests, and similar medical applications.

NAICS	NAICS Name
325411	Medicinal and Botanical Manufacturing
325412	Pharmaceutical Preparation Manufacturing
325414	Biological Product (except Diagnostic) Manufacturing
325413	In-Vitro Diagnostic Substance Manufacturing

Business Services

Number of industries: 33

Description: Firms in this cluster include establishments and services primarily designed to support other aspects of a business or to assist unrelated companies. This includes corporate headquarters. Professional services such as consulting, legal services, facilities support services, computer services, engineering and architectural services, and placement services. All for-hire ground passenger transportation services are also present in this cluster.

NAICS	NAICS Name
551111	Offices of Bank Holding Companies
551112	Offices of Other Holding Companies
551114	Corporate, Subsidiary, and Regional Managing Offices
541611	Administrative Management and General Management Consulting Services
541612	Human Resources and Executive Search Consulting Services
541614	Process, Physical Distribution, and Logistics Consulting Services
541618	Other Management Consulting Services
541690	Other Scientific and Technical Consulting Services
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
541199	All Other Legal Services
541214	Payroll Services
541930	Translation and Interpretation Services
541990	All Other Professional, Scientific, and Technical Services
561210	Facilities Support Services

Business Services, Continued

NAICS	NAICS Name
561330	Professional Employer Organizations
561421	Telephone Answering Services
561422	Telemarketing Bureaus
561920	Convention and Trade Show Organizers
518210	Data Processing, Hosting, and Related Services
541511	Customer Computer Programming Services
541512	Computer Systems Design Services
541513	Computer Facilities Management Services
541519	Other Computer Related Services
561311	Employment Placement Agencies
561312	Executive Search Services
541330	Engineering Services
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
485310	Taxi Service
485320	Limousine Service
485999	All Other Transit and Ground Passenger Transportation
532112	Passenger Car Leasing

Coal Mining

Number of industries: 4

Description: This cluster includes establishments that mine coal and provide services to support coal mining.

NAICS	NAICS Name
212111	Bituminous Coal and Lignite Surface Mining
212112	Bituminous Coal Underground Mining
212113	Anthracite Mining
213113	Support Activities for Coal Mining

Communications Equipment and Services

Number of industries: 8

Description: This cluster involves goods and services used for communications. This includes cable, wireless, and satellite services, as well as telephone, broadcasting, and wireless communications equipment.

NAICS	NAICS Name
515210	Cable and Other Subscription Programming
517210	Wireless Telecommunications Carriers (except Satellite)
517410	Satellite Telecommunications
517919	All Other Telecommunications
334210	Telephone Apparatus Manufacturing
334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
334290	Other Communications Equipment Manufacturing
335912	Primary Battery Manufacturing

Construction Products and Services

Number of industries: 20

Description: The establishments in this cluster supply construction materials, components, products, and services. Construction materials and components include those made of sand, stone, gravel, asphalt, cement, concrete, and other earthen substances. Construction products include pipes and heat exchangers. Construction services include the construction of pipelines for water, sewers, oil and gas, power, and communication, as well as building services for homes and industrial buildings.

NAICS	NAICS Name
236210	Industrial Building Construction
237120	Oil and Gas Pipeline and Related Structures Construction
237130	Power and Communication Line and Related Structures Construction
237990	Other Heavy and Civil Engineering Construction
221310	Water Supply and Irrigation Systems
221330	Steam and Air-Conditioning Supply
332410	Power Boiler and Heat Exchanger Manufacturing
332420	Metal Tank (Heavy Gauge) Manufacturing
332913	Plumbing Fixture Fitting and Trim Manufacturing
332996	Fabricated Pipe and Pipe Fitting Manufacturing
327310	Cement Manufacturing
327331	Concrete Block and Brick Manufacturing
327332	Concrete Pipe Manufacturing
327410	Lime Manufacturing
327420	Gypsum Product Manufacturing
327991	Cut Stone and Stone Product Manufacturing
327993	Mineral Wool Manufacturing
327999	All Other Miscellaneous nonmetallic Mineral Product Manufacturing
324121	Asphalt Paving Mixture and Block Manufacturing
324122	Asphalt Shingle and Coating Materials Manufacturing

Distribution and Electronic Commerce

Number of industries: 62

Description: This cluster consists primarily of traditional wholesalers as well as mail order houses and electronic merchants. The companies in this cluster mostly buy, hold, and distribute a wide range of products such as apparel, food, chemicals, gasses, minerals, farm materials, machinery, and other merchandise. The cluster also contains firms that support distribution and electronic commerce operations, including packaging, labeling, and equipment rental and leasing.

NAICS	NAICS Name
493110	General Warehousing and Storage
493120	Refrigerated Warehousing and Storage
493190	Other Warehousing and Storage
425110	Business to Business Electronic Markets
454111	Electronic Shopping
454112	Electronic Auctions
454113	Mail-Order Houses
425120	Wholesale Trade Agents and Brokers
561499	All Other Business Support Services
561910	Packaging and Labeling Services
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers

Distribution and Electronic Commerce, Continued

NAICS	NAICS Name
424320	Men's and Boys' Clothing and Furnishings Merchant Wholesalers
424330	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers
424340	Footwear Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
424610	Plastics Materials and Basic Forms and Shapes Merchant Wholesalers
424690	Other Chemical and Allied Products Merchant Wholesalers
424210	Drugs and Druggists' Sundries Merchant Wholesalers
424590	Other Farm Product Raw Material Merchant Wholesalers
424910	Farm Supplies Merchant Wholesalers
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers
424940	Tobacco and Tobacco Product Merchant Wholesalers
493130	Farm Product Warehousing and Storage
424440	Poultry and Poultry Product Merchant Wholesalers
424460	Fish and Seafood Merchant Wholesalers
424470	Meat and Meat Product Merchant Wholesalers
424480	Fresh Fruit and Vegetable Merchant Wholesalers
424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers
423210	Furniture Merchant Wholesalers
423220	Home Furnishings Merchant Wholesalers
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
424110	Printing and Writing Paper Merchant Wholesalers
424120	Stationary and Office Supplies Merchant Wholesalers
424130	Industrial and Personal Service Paper Merchant Wholesalers
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers
424950	Paint, Varnish, and Supplies Merchant Wholesalers
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers
423830	Industrial Machinery and Equipment Merchant Wholesalers
423840	Industrial Supplies Merchant Wholesalers
423850	Service Establishment Equipment and Supplies Merchant Wholesalers
423860	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers
423410	Photographic Equipment and Supplies Merchant Wholesalers
423420	Office Equipment Merchant Wholesalers
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers
423440	Other Commercial Equipment Merchant Wholesalers
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers
423460	Ophthalmic Goods Merchant Wholesalers
423490	Other Professional Equipment and Supplies Merchant Wholesalers
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers
423620	Electrical and Electronic Appliance, Television, and Radio Set Merchant Wholesalers
423690	Other Electronic Parts and Equipment Merchant Wholesalers
423510	Metal Service Centers and Other Metal Merchant Wholesalers
423520	Coal and Other Mineral and Ore Merchant Wholesalers

Distribution and Electronic Commerce, Continued

NAICS	NAICS Name
424710	Petroleum Bulk Stations and Terminals
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
532411	Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing
532420	Office Machinery and Equipment Rental and Leasing
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing

Downstream Chemical Products

Number of industries: 13

Description: Establishments in this cluster manufacture complex chemical products for end users. These products include adhesives, beauty products, soaps, cleaners, film processing chemicals, dyes, paints, explosives, and lubricating oils.

NAICS	NAICS Name
325611	Soap and Other Detergent Manufacturing
325612	Polish and Other Sanitation Good Manufacturing
325613	Surface Active Agent Manufacturing
325620	Toilet Preparation Manufacturing
325520	Adhesive Manufacturing
325991	Custom Compounding of Purchased Resins
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing
325131	Inorganic Dye and Pigment Manufacturing
325132	Synthetic Organic Dye and Pigment Manufacturing
325510	Paint and Coating Manufacturing
325920	Explosives Manufacturing
324191	Petroleum Lubricating Oil and Grease Manufacturing

Downstream Metal Products

Number of industries: 16

Description: This cluster contains establishments that manufacture metal containers, prefabricated metal structures, and end user metal products. These end user products include ammunition, kitchenware, hardware, metal bathroom fixtures, and similar metal products used in home finishing such as doors, windows, and ornamentation.

NAICS	NAICS Name
332211	Cutlery and Flatware (except Precious) Manufacturing
332213	Saw Blade and Handsaw Manufacturing
332214	Kitchen Utensil, Pot, and Pan Manufacturing
332321	Metal Window and Door Manufacturing
332323	Ornamental and Architectural Metal Work Manufacturing
332510	Hardware Manufacturing
332998	Enameled Iron and Metal Sanitary Ware Manufacturing
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing
332992	Small Arms Ammunition Manufacturing
332993	Ammunition (except Small Arms) Manufacturing
332994	Small Arms Manufacturing

Downstream Metal Products, Continued

NAICS	NAICS Name
332995	Other Ordnance and Accessories Manufacturing
332311	Prefabricated Metal Building and Component Manufacturing
332312	Fabricated Structural Metal Manufacturing
332431	Metal Can Manufacturing
332439	Other Metal Container Manufacturing

Education and Knowledge Creation

Number of industries: 15

Description: This cluster contains all educational and training institutions, as well as related supporting establishments. It also includes research and development institutions in biotechnology, physical sciences, engineering, life sciences, and social sciences.

NAICS	NAICS Name
611410	Business and Secretarial Schools
611420	Computer Training
611430	Professional and Management Development Training
611512	Flight Training
611513	Apprenticeship Training
611630	Language Schools
611691	Exam Preparation and Tutoring
611699	All Other Miscellaneous Schools and Instruction
611210	Junior Colleges
611310	Colleges, Universities, and Professional Schools
611710	Educational Support Services
541711	Research and Development in Biotechnology
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)
541720	Research and Development in the Social Sciences and Humanities
813920	Professional Organizations

Electric Power Generation and Transmission

Number of industries: 5

Description: This cluster contains establishments primarily engaged in generating and distributing electric power. This includes power generated from alternative energy sources such as hydroelectric power, nuclear electric power, and solar and wind generated electric power.

NAICS	NAICS Name
221112	Fossil Fuel Electric Power Generation
221111	Hydroelectric Power Generation
221113	Nuclear Electric Power Generation
221119	Other Electric Power Generation
221121	Electric Bulk Power Transmission and Control

Environmental Services

Number of industries: 7

Description: This cluster contains establishments primarily engaged in collection, treatment, processing, and disposal of hazardous and non-hazardous waste.

NAICS	NAICS Name
562112	Hazardous Waste Collection
562119	Other Waste Collection
562211	Hazardous Waste Treatment and Disposal
562213	Solid Waste Combustors and Incinerators
562219	Other Nonhazardous Waste Treatment and Disposal
562920	Materials Recovery Facilities
562998	All Other Miscellaneous Waste Management Services

Financial Services

Number of industries: 26

Description: This cluster contains establishments involved in aiding the transaction and growth of financial assets for businesses and individuals. These firms include securities brokers, dealers, and exchanges; credit institutions; and financial investment support. Insurance firms are located in a separate Insurance cluster.

NAICS	NAICS Name
523910	Miscellaneous Intermediation
523920	Portfolio Management
523930	Investment Advice
523991	Trust, Fiduciary, and Custody Activities
523999	Miscellaneous Financial Investment Activities
525910	Open-End Investment Funds
525990	Other Financial Vehicles
522120	Savings Institutions
522190	Other Depository Credit Intermediation
522210	Credit Card Issuing
522220	Sales Financing
522291	Consumer Lending
522292	Real Estate Credit
522293	International Trade Financing
522294	Secondary Market Financing
522298	All Other Nondepository Credit Intermediation
522320	Financial Transactions Processing, Reserve, and Clearinghouse Activities
522390	Other Activities Related to Credi Intermediation
561450	Credit Bureaus
521110	Monetary Authorities - Central Bank
522310	Mortgage and Nonmortgage Loan Brokers
523110	Investment Banking and Securities Dealing
523120	Securities Brokerage
523130	Commodity Contracts Dealing
523140	Commodity Contracts Brokerage
523210	Securities and Commodity Exchanges

Fishing and Fishing Products

Number of industries: 5

Description: Establishments in this cluster are engaged primarily in catching fish and other seafood and processing the catch for consumption.

NAICS	NAICS Name
114111	Finfish Fishing
114112	Shellfish Fishing
114119	Other Marine Fishing
311711	Seafood Canning
311712	Fresh and Frozen Seafood Processing

Food Processing and Manufacturing

Number of industries: 47

Description: This cluster includes firms involved in the processing of raw food materials and the manufacturing of downstream food products for end users. This includes millers and refineries of rice, flour, corn, sugar, and oilseeds. These upstream products contribute in part to producing specialty foods, animal foods, baked goods, candies, teas, coffees, beers, wines, other beverages, meats, packaged fruits and vegetables, and processed dairy products.

NAICS	NAICS Name
311412	Frozen Specialty Food Manufacturing
311422	Specialty Canning
311930	Flavoring Syrup and Concentrate Manufacturing
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing
311942	Spice and Extract Manufacturing
311991	Perishable Prepared Food Manufacturing
311999	All Other Miscellaneous Food Manufacturing
311211	Flour Milling
311230	Breakfast Cereal Manufacturing
311813	Frozen Cakes, Pies, and Other Pastries Manufacturing
311821	Cookie and Cracker Manufacturing
311822	Flour Mixes and Dough Manufacturing from Purchased Flour
311823	Dry Pasta Manufacturing
311830	Tortilla Manufacturing
311919	Other Snack Food Manufacturing
311320	Chocolate and Confectionery Manufacturing from Cacao Beans
311330	Confectionery Manufacturing from Purchased
311340	Nonchocolate Confectionery Manufacturing
311920	Coffee and Tea Manufacturing
311411	Frozen Fruit, Juice, and Vegetable Manufacturing
311421	Fruit and Vegetable Canning
311423	Dried and Dehydrated Food Manufacturing
311911	Roasted Nuts and Peanut Butter Manufacturing
311511	Fluid Milk Manufacturing
311512	Creamery Butter Manufacturing
311513	Cheese Manufacturing
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing
311520	Ice Cream and Frozen Dessert Manufacturing

Food Processing and Manufacturing, Continued

NAICS	NAICS Name
311111	Dog and Cat Food Manufacturing
311119	Other Animal Food Manufacturing
312111	Soft Drink Manufacturing
312112	Bottled Water Manufacturing
312113	Ice Manufacturing
311213	Malt Manufacturing
312120	Breweries
312140	Distilleries
312130	Wineries
311212	Rice Milling
311221	Wet Corn Milling
311221	Soybean Processing
311223	Other Oilseed Processing
311225	Fats and Oils Refining and Blending
311311	Sugarcane Mills
311312	Cane Sugar Refining
311313	Beet Sugar Manufacturing
424510	Grain and Field Bean Merchant Wholesalers
327213	Glass Container Manufacturing

Footwear

Number of industries: 6

Description: Establishments in this cluster are those that manufacture men's and women's shoes, boots, slippers, and other footwear. This cluster also contains the upstream leather used in making footwear.

NAICS	NAICS Name
316211	Rubber and Plastics Footwear Manufacturing
316219	Other Footwear Manufacturing
316212	House Slipper Manufacturing
316213	Men's Footwear (except Athletic) Manufacturing
316214	Women's Footwear (except Athletic) Manufacturing
316110	Leather and Hide Tanning and Finishing

Forestry

Number of industries: 4

Description: Establishments in this cluster are those that involve growing and harvesting trees. It also includes support services for these activities.

NAICS	NAICS Name
113110	Timber Tract Operations
113210	Forest Nurseries & Gathering Forest Products
113310	Logging
115310	Forestry Support Activities

Furniture

Number of industries: 12

Description: This cluster contains establishments that manufacture furniture, cabinets, and shelving for residential homes and offices. It also includes establishments that produce manufactured homes. The products in this cluster can be made of wood, metal, plastic, and/or textiles.

NAICS	NAICS Name
337121	Upholstered Household Furniture Manufacturing
337122	Nonupholstered Wood Household Furniture Manufacturing
337124	Metal Household Furniture Manufacturing
337125	Household Furniture (except Wood and Metal) Manufacturing
337910	Mattress Manufacturing
337127	Institutional Furniture Manufacturing
337211	Wood Office Furniture Manufacturing
337214	Office Furniture (except Wood) Manufacturing
337110	Wood Kitchen Cabinet and Countertop Manufacturing
337129	Wood Television, Radio, and Sewing Machine Cabinet Manufacturing
337215	Showcase, Partition, Shelving, and Locker Manufacturing
321991	Manufactured Home (Mobile Home) Manufacturing

Hospitality and Tourism

Number of industries: 31

Description: This cluster contains establishments related to hospitality and tourism services and venues. This includes sports venues, casinos, museums, and other attractions. It also includes hotels and other accommodations, transportation, and services related to recreational travel such as reservation services and tour operators.

NAICS	NAICS Name
711211	Sports Teams and Clubs
711212	Racetracks
711219	Other Spectator Sports
713110	Amusement and Theme Parks
713120	Amusement Arcades
453920	Art Dealers
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
712190	Nature Parks and Other Similar Institutions
713210	Casinos (except Casino Hotels)
713290	Other Gambling Industries
114210	Hunting and Trapping
713920	Skiing Facilities
713930	Marinas
713990	All Other Amusement and Recreation Industries
721214	Recreational and Vacation Camps (except Campgrounds)
561591	Convention and Visitors Bureaus
721110	Hotels (except Casino Hotels) and Motels
721120	Casino Hotels

Hospitality and Tourism, Continued

NAICS	NAICS Name
721191	Bed-and-Breakfast Inns
721199	All Other Traveler Accommodation
721211	RV (Recreational Vehicle) Parks and Campgrounds
721310	Rooming and Boarding Houses
487110	Scenic and Sightseeing Transportation, Land
487210	Scenic and Sightseeing Transportation, Water
487990	Scenic and Sightseeing Transportation, Other
532292	Recreational Goods Rental
561510	Travel Agencies
561520	Tour Operators
561599	All Other Travel Arrangement and Reservation Services

Information Technology and Analytical Instruments

Number of industries: 27

Description: This cluster consists of information technology and analytical products such as computers, software, audio visual equipment, laboratory instruments, and medical devices. The cluster also includes the standard and precision electronics used by these products (for example, circuit boards and semiconductor devices).

NAICS	NAICS Name
334411	Electron Tube Manufacturing
334412	Bare Printed Circuit Board Manufacturing
334414	Electronic Capacitor Manufacturing
334415	Electronic Resistor Manufacturing
334416	Electronic Coil, Transformer, and Other Inductor Manufacturing
334417	Electronic Connector Manufacturing
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing
33419	Other Electronic Component Manufacturing
334111	Electronic Computer Manufacturing
334112	Computer Storage Device Manufacturing
334113	Computer Terminal Manufacturing
334119	Other Computer Peripheral Equipment Manufacturing
333295	Semiconductor Machinery Manufacturing
334413	Semiconductor and Related Device Manufacturing
511210	Software Publishers
334611	Software Reproducing
334613	Magnetic and Optical Recording Media Manufacturing
334512	Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use
334513	Instruments and Related Products Manufacturing for Measuring, Displying, and Controlling Industrial Process
334514	Totalizing Fluid Meter and Counting Device Manufacturing
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals
334516	Analytical Laboratory Instrument Manufacturing
334518	Watch, Clock, and Part Manufacturing
334519	Other Measuring and Controlling Device Manufacturing
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing
334517	Irradiation Apparatus Manufacturing
334310	Audio and Video Equipment Manufacturing

Insurance Services

Number of industries: 8

Description: This cluster consists of firms providing a range of insurance types, as well as support services such as reinsurance and claims adjustment.

NAICS	NAICS Name
524291	Claims Adjusting
524298	All Other Insurance Related Activities
524113	Direct Life Insurance Carriers
524114	Direct Health and Medical Insurance Carriers
524126	Direct Property and Casualty Insurance Carriers
524127	Direct Title Insurance Carriers
524128	Other Direct Insurance (except Life, Health, and Medical) Carriers
524130	Reinsurance Carriers

Jewelry and Precious Metals

Number of industries: 4

Description: Establishments in this cluster manufacture jewelry, silverware, and fine tableware. This cluster also includes the upstream manufacture of jewelry parts and the processing of gemstones.

NAICS	NAICS Name
339911	Jewelry (except Costume) Manufacturing
339913	Jewelers' Material and Lapidary Work Manufacturing
339914	Costume Jewelry and Novelty Manufacturing
339912	Silverware and Hollowware Manufacturing

Leather and Related Products

Number of industries: 6

Description: This cluster consists of manufacturers of luggage and handbags made of leather and fabric. It also includes producers of personal and assorted other leather goods, as well as mills that produce textile bags and related products made from canvas.

NAICS	NAICS Name
316991	Luggage Manufacturing
316992	Women's Handbag and Purse Manufacturing
316993	Personal Leather Good (except Women's Handbag and Purse) Manufacturing
316999	All Other Leather Good Manufacturing
314911	Textile Bag Mills
314912	Canvas and Related Product Mills

Lighting and Electrical Equipment

Number of industries: 15

Description: This cluster contains firms involved in the manufacture of electrical equipment and electronic components. The companies in this cluster manufacture wire for communications, wiring devices, fiber optic cables, switchboards, lighting fixtures, motors, transformers, and related products.

NAICS	NAICS Name
335110	Electric Lamp Bulb and Part Manufacturing
335121	Residential Electric Lighting Fixture Manufacturing
335122	Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing

Lighting and Electrical Equipment, Continued

NAICS	NAICS Name
335129	Other Lighting Equipment Manufacturing
335311	Power, Distribution, and Specialty Transformer Manufacturing
335312	Motor and Generator Manufacturing
335313	Switchgear and Switchboard Apparatus Manufacturing
335314	Relay and Industrial Control Manufacturing
335921	Fiber Optic Cable Manufacturing
335929	Other Communication and Energy Wire Manufacturing
335931	Current-Carrying Wiring Device Manufacturing
335932	Noncurrent-Carrying Wiring Device Manufacturing
335991	Carbon and Graphite Product Manufacturing
335999	All Other Miscellaneous Electrical Equipment and Component Manufacturing
335911	Storage Battery Manufacturing

Livestock Processing

Number of industries: 5

Description: This cluster contains establishments engaged in processing meat from livestock and livestock wholesaling.

NAICS	NAICS Name
311611	Animal (except Poultry) Slaughtering
311612	Meat Processed from Carcasses
311613	Rendering and Meat Byproduct Processing
311615	Poultry Processing
424520	Livestock Merchant Wholesalers

Marketing, Design, and Publishing

Number of industries: 22

Description: This cluster consists of establishments involved in design services (physical and graphical), marketing (including advertising creation, marketing research, media buying, and public relations), and publishing (both in hard copy and on the internet).

NAICS	NAICS Name
541810	Advertising Agencies
541850	Display Advertising
541860	Direct Mail Advertising
541870	Advertising Material Distribution Services
541890	Other Services Related to Advertising
541613	Marketing Consulting Services
541820	Public Relations Agencies
541830	Media Buying Agencies
541840	Media Representatives
541910	Marketing Research and Public Opinion Polling
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services

Marketing, Design, and Publishing, Continued

NAICS	NAICS Name
541490	Other Specialized Design Services
511120	Periodical Publishers
511130	Book Publishers
511140	Directory and Mailing List Publishers
511199	All Other Publishers
519110	News Syndicates
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
519190	All Other Information Services

Medical Devices

Number of industries: 5

Description: Establishments in this cluster primarily manufacture surgical, dental, and optical instruments and supplies.

NAICS	NAICS Name
333314	Optical Instrument and Lens Manufacturing
339115	Ophthalmic Goods Manufacturing
339112	Surgicla and Medical Instrument Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339114	Dental Equipment and Supplies Manufacturing

Metal Mining

Number of industries: 8

Description: Establishments in this cluster mine various metals including iron, gold, silver, lead, copper, and uranium. It also includes firms involved in support metal mining activities.

NAICS	NAICS Name
212210	Iron Ore Mining
212221	Gold Ore Mining
212222	Silver Ore Mining
212231	Lead Ore & Zinc Ore Mining
212234	Copper Ore & Nickel Ore Mining
212291	Uranium-Radium-Vanadium Ore Mining
212299	All Other Metal Ore Mining
213114	Support Activities for Metal Mining

Metalworking Technology

Number of industries: 17

Description: The establishments in this cluster manufacture machine tools and process metal for use in metal working. The cluster also contains the downstream manufacture of metal fasteners and hand tools.

NAICS	NAICS Name
333511	Industrial Mold Manufacturing
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing
333516	Rolling Mill Machinery and Equipment Manufacturing

Metalworking Technology, Continued

NAICS	NAICS Name
333518	Other Metalworking Machinery Manufacturing
333992	Welding and Soldering Equipment Manufacturing
33512	Machine Tool (Metal Cutting Types) Manufacturing
333513	Machine Tool (Metal Forming Types) Manufacturing
333515	Cutting Tool and Machine Tool Accessory Manufacturing
332212	Hand and Edge Tool Manufacturing
333991	Power-Driven Handtool Manufacturing
332721	Precision Turned Product Manufacturing
332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing
327910	Abrasive Product Manufacturing
332313	Plate Work Manufacturing
332811	Metal Heat Treating
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers
332813	Electroplating, Plating, Polishing, Anodizing, and Coloring

Music and Sound Recording

Number of industries: 5

Description: Establishments in this cluster are primarily involved in the production and distribution of music and other sound recordings.

NAICS	NAICS Name
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries

Nonmetal Mining

Number of industries: 13

Description: Establishments in this cluster mine earthen materials other than metals. This includes stone, granite, sand, clay, borate, and other minerals. The cluster also includes support for the nonmetal mining activities.

NAICS	NAICS Name
212311	Dimension Stone Mining and Quarrying
212312	Crushed and Broken Limestone Mining and Quarrying
212313	Crushed and Broken Granite Mining and Quarrying
212319	Other Crushed and Broken Stone Mining and Quarrying
212321	Construction Sand and Gravel Mining
212322	Industrial Sand Mining
212324	Kaolin and Ball Clay Mining
212325	Clay and Ceramic and Refractory Minerals Mining
212391	Potash, Soda, and Borate Mineral Mining
212392	Phosphate Rock Mining
212393	Other Chemical and Fertilizer Mineral Mining
212399	All Other Nonmetallic Mineral Mining
213115	Nonmetallic Minerals Support Activity (except Fuels)

Oil and Gas Production and Transportation

Number of industries: 12

Description: This cluster includes frims involved in locating, extracting, refining, and transporting oil and gas. This includes companies that manufacture the equipment necessary to extract oil and gas, as well as companies that provide support services for oil and gas operations and pipeline transport.

NAICS	NAICS Name
324110	Petroleum Refineries
324199	All Other Petroleum and Coal Products Manufacturing
213112	Support Activities for Oil and Gas Operations
541360	Geophysical Surveying and Mapping Services
213111	Drilling Oil and Gas Wells
211111	Crude Petroleum and Natural Gas Extraction
211112	Natural Gas Liquid Extraction
333132	Oil and Gas Field Machinery and Equipment Manufacturing
486110	Pipeline Transportation of Crude Oil
486210	Pipeline Transportation of Natural Gas
486910	Pipeline Transportation of Refined Petroleum Products
486990	All Other Pipeline Transportation

Paper and Packaging

Number of industries: 20

Description: This cluster contains the paper mills and manufacturers of paper products used for shipping, packaging, containers, office supplies, personal products, and similar products.

NAICS	NAICS Name
322110	Pulp Mills
322121	Paper (except Newsprint) Mills
322122	Newsprint Mills
322130	Paperboard Mills
322211	Corrugated and Solid Fiber Box Manufacturing
322212	Folding Paperboard Box Manufacturing
322213	Setup Paperboard Box Manufacturing
322214	Fiber Can, Tube, Drum, and Similar Products Manufacturing
322215	Nonfolding Sanitary Food Container Manufacturing
322223	Plastics, Foil, and Coated Paper Bag Manufacturing
322224	Uncoated Papter and Multiwall Bag Manufacturing
322225	Laminated Aluminum Foil Manufacturing for Flexible Film Manufacturing
322221	Coated and Laminated Packaging Paper and Plastics Film Manufacturing
322222	Coated and Laminated Paper Manufacturing
322226	Surface-Coated Paperboard Manufacturing
322231	Die-Cut Paper and Paperboard Office Supplies Manufacturing
322232	Envelope Manufacturing
322233	Stationary, Table, and Related Product Manufacturing
322291	Sanitary Paper Product Manufacturing
322299	All Other Converted Paper Product Manufacturing

Performing Arts

Number of industries: 8

Description: This cluster contains services that produce, promote, and support live artistic performances. Live performances include those by theater companies, dance troupes, musicians, and independent artists.

NAICS	NAICS Name
711110	theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711190	Other Performing Arts Companies
711510	Indpendent Artists, Writers and Performers
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures

Plastics

Number of industries: 15

Description: Establishments in this cluster manufacture plastic materials, components, and products. The plastics and foams are manufactured for packaging, pipes, floor coverings, and related plastic products. The cluster also includes the upstream manufacturing of plastic materials and resins, as well as the industrial machines used to manufacture plastics.

NAICS	NAICS Name
326111	Plastics Bag Manufacturing
326122	Plastics Pipe and Pipe Fitting Manufacturing
326140	Polystyrene Foam Product Manufacturing
326150	Urethane and Other Foam Product (except Polystyrene) Manufacturing
326160	Plastics Bottle Manufacturing
326191	Plastics Plumbing Fixture Manufacturing
326192	Resilient Floor Covering Manufacturing
326199	All Other Plastics Product Manufacturing
339994	Broom, Brush, and Mop Manufacturing
325211	Plastics Material and Resin Manufacturing
326112	Plastics Packaging Film and Sheet (except Packaging) Manufacturing
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing
326121	Unlaminated Plastics Profile Shape Manufacturing
326130	Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing
333220	Plastics and Rubber Industry Machinery Manufacturing

Printing Services

Number of industries: 13

Description: Establishments in this cluster are primarily engaged in commercial printing, digital printing, and binding. The cluster includes upstream products and services necessary for printing (for example, ink and prepress services). It also includes end products such as books, greeting cards, business forms, and

NAICS	NAICS Name
325910	Printing Ink Manufacturing
323121	Tradebinding and Related Work
323122	Prepress Services

Printing Services, Continued

NAICS	NAICS Name
323110	Commercial Lithographic Printing
323111	Commercial Gravure Printing
323112	Commercial Flexographic Printing
323113	Commercial Screen Printing
323115	Digital Printing
323116	Manifold Business Forms Printing
323117	Books Printing
323118	Blankbook, Looseleaf Binders, and Devices Manufacturing
323119	Other Commercial Printing
511191	Greeting Card Publishers

Production Technology and Heavy Machinery

Number of industries: 41

Description: Establishments in this cluster primarily manufacture machines designed to produce parts and devices used in the production of downstream products. This cluster also includes end use heavy machinery such as air and material handling equipment. The machines are used for industrial, agricultural, construction, commercial industry, and related purposes.

NAICS	NAICS Name
333210	Sawmill and Woodworking Machinery Manufacturing
333291	Paper Industry Machinery Manufacturing
333292	Textile Machinery Manufacturing
333293	Printing Machinery and Equipment Manufacturing
333294	Food Product Machinery Manufacturing
333298	All Other Industrial Machinery Manufacturing
333993	Packaging Machinery Manufacturing
333999	All Other Miscellaneous General Purpose Machinery Manufacturing
333111	Farm Machinery and Equipment Manufacturing
333112	Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing
333120	Construction Machinery Manufacturing
333131	Mining Machinery and Equipment Manufacturing
333611	Turbine and Turbine Generator Set Units Manufacturing
333612	Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing
333613	Mechanical Power Transmission Equipment Manufacturing
333618	Other Engine Equipment Manufacturing
336510	Railroad Rolling Stock Manufacturing
333411	Air Purification Equipment Manufacturing
333412	Industrial and Commercial Fan and Blower Manufacturing
333414	Heating Equipment (except Warm Air Furnace) Manufacturing
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing
333311	Automatic Vending Machine Manufacturing
333312	Commercial Laundry, Drycleaning, and Pressing Machine Manufacturing
333319	Other Commercial and Service Industry Machinery Manufacturing
333921	Elevator and Moving Stairway Manufacturing
333922	Conveyor and Conveying Equipment Manufacturing

Production Technology and Heavy Machinery, Continued

NAICS	NAICS Name
333923	Overhead Traveling Crane, Hoist, and Monorail System Manufacturing
333924	Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing
332911	Industrial Valve Manufacturing
332912	Fluid Power Valve and Hose Fitting Manufacturing
332919	Other Metal Valve and Pipe Fitting Manufacturing
332991	Ball and Roller Bearing Manufacturing
332997	Industrial Pattern Manufacturing
333911	Pump and Pumping Equipment Manufacturing
333912	Air and Gas Compressor Manufacturing
333913	Measuring and Dispensing Pump Manufacturing
333994	Industrial Process Furnace and Oven Manufacturing
333995	Fluid Power Cylinder and Actuator Manufacturing
333996	Fluid Power Pump and Motor Manufacturing
333997	Scale and Balance (except Laboratory) Manufacturing
339991	Gasket, Packing, and Sealing Device Manufacturing

Recreational and Small Electric Goods

Number of industries: 15

Description: This cluster contains establishments that manufacture end use products for recreational and decorative purposes. These products include games, toys, bicycles, motorcycles, musical instruments, sporting goods, art supplies, office supplies, shades, and home accessories. This cluster also incorporates firms that produce small, simple electric goods like hairdryers, fans, and office machinery.

NAICS	NAICS Name
337920	Blind and Shade Manufacturing
339992	Musical Instrument Manufacturing
339993	Fastener, Button, Needle, and Pin Manufacturing
339999	All Other Miscellaneous Manufacturing
339931	Doll and Stuffed Toy Manufacturing
339932	Game, Toy, and Children's Vehicle Manufacturing
336991	Motorcycle, Bicycle, and Parts Manufacturing
339920	Sporting and Athletic Goods Manufacturing
333313	Office Machinery Manufacturing
333315	Photographic and Photcopying Equipment Manufacturing
339941	Pen and Mechanical Pencil Manufacturing
339942	Lead Pencil and Art Good Manufacturing
339943	Marking Device Manufacturing
339944	Carbon Paper and Inked Ribbon Manufacturing
335211	Electric Housewares and Household Fan Manufacturing

Textile Manufacturing

Number of industries: 23

Description: This cluster contains textile mills that primarily produce and finish fabrics for clothing, carpets, upholstery, and similar uses. The textiles include yarn, thread, fibers, hosiery, knits, and other specialty fabrics.

NAICS	NAICS Name
313111	Yarn Spinning Mills
313112	Yarn Texturizing , Throwing, and Twisting Mills
313113	Thread Mills
313210	Broadwoven Fabric Mills
313221	Narrow Fabric Mills
313222	Schiffili Machine Embroidery
313230	Nonwoven Fabric Mills
313241	Weft Knit Fabric Mills
313249	Other Knit Fabric and Lace Mills
313311	Broadwoven Fabric Finishing Mills
313312	Textile and Fabric Finishing (except Broadwoven Fabric) Mills
313320	Fabric Coating Mills
315111	Sheer Hosiery Mills
315119	Other Hosiery and Sock Mills
315191	Outerwear Knitting Mills
315192	Underwear and Nightwear Knitting Mills
314110	Carpet and Rug Mills
314121	Curtain and Drapery Mills
314129	Other Household Textile Product Mills
314991	Rope, Cordage, and Twine Mills
314992	Tire Cord and Tire Fabric Mills
325221	Cellulosic Organic Fiber Manufacturing
325222	Noncellulosic Organic Fiber Manufacturing

Tobacco

Number of industries: 3

Description: The establishments in this cluster manufacture cigarettes and other tobacco products. This also includes upstream tobacco leaf processing.

NAICS	NAICS Name
312210	Tobacco Stemming and Redrying
312221	Cigarette Manufacturing
312229	Other Tobacco Product Manufacturing

Trailers, Motor Homes, and Appliances

Number of industries: 9

Description: This cluster includes establishments that manufacture trailers, campers, and motor homes, as well as major household appliances.

NAICS	NAICS Name
336212	Truck Trailer Manufacturing
336213	Motor Home Manufacturing
336214	Travel Trailer and Camper Manufacturing

Trailers, Motor Homes, and Appliances, Continued

NAICS	NAICS Name
339995	Burial Casket Manufacturing
335212	Household Vacuum Cleaner Manufacturing
335221	Household Cooking Appliance Manufacturing
335222	Household Refrigerator and Home Freezer Manufacturing
335224	Household Laundry Equipment Manufacturing
335228	Other Major Household Appliance Manufacturing

Transportation and Logistics

Number of industries: 17

Description: This cluster contains all air, rail, bus, and freight transportation services. It also includes related operation services and support activities such as inspections, maintenance, repairs, security, and loading/unloading.

NAICS	NAICS Name
481111	Scheduled Passenter Air Transportation
481112	Scheduled Freight Air Transportation
481212	Nonscheduled Charted Freight Air Transportation
488111	Air Traffic Control
488119	Other Airport Operations
488190	Other Support Activities for Air Transportation
481211	Nonscheduled Charted Passenger Air Transportation
481219	Other Nonscheduled Air Transportation
488210	Support Activites for Rail Transportations
488490	Other Support Activities for Road Transportation
488510	Freight Transportation Arrangement
488991	Packing and Crating
488999	All Other Support Activities for Transportation
484121	General Freight Trucking, Long-Distance, Truckload
484230	Specialized Freight (except Used Goods) Trucking, Long Distance
485210	Interurban and Rural Bus Transportation
485510	Charter Bus Industry

Upstream Chemical Products

Number of industries: 12

Description: This cluster consists of firms that manufacture basic organic and inorganic chemicals and gases. The chemicals are usually separate elements that could be used as inputs for more complex downstream chemical products.

NAICS	NAICS Name
325110	Petrochemical Manufacturing
325191	Gum and Wood Chemical Manufacturing
325192	Cyclic Crude and Intermediate Manufacturing
325193	Ethyl Alcohol Manufacturing
325199	All Other Basic Organic Chemical Manufacturing
325212	Synthetic Rubber Manufacturing
325181	Alkalies and Chlorine Manufacturing
325182	Carbon Black Manufacturing

Upstream Chemical Products, Continued

NAICS	NAICS Name
325188	All Other Basic Inorganic Chemical Manufacturing
325120	Industrial Gas Manufacturing
325312	Phosphatic Fertilizer Manufacturing
325320	Pesticide and Other Agricultural Chemical Manufacturing

Upstream Metal Manufacturing

Number of industries: 26

Description: The establishments in this cluster manufacture upstream metal products such as pipes, tubes, metal closures, wires, springs, and related products. The cluster includes iron and steel mills and foundries, as well as related metal processing techniques.

NAICS	NAICS Name
331111	Iron and Steel Mills
332111	Iron and Steel Forging
331221	Rolled Steel Shape Manufacturing
331311	Alumina Refining
331312	Primary Aluminium Production
331314	Secondary Smelting and Alloying of Aluminum
331315	Aluminum Sheet, Plate, and Foil Manufacturing
331316	Aluminum Extruded Product Manufacturing
331319	Other Aluminum Rolling and Drawing
331411	Primary Smelting and Refining of Copper
331419	Other Nonferrous Metal Prim Smelting/Refining
331421	Copper Rolling, Drawing, and Extruding
331422	Copper Wire (except Mechanical) Drawing
331423	Secondary Smelting, Refining, and Alloying of Copper
331491	Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding
331492	Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)
332112	Nonferrous Forging
331112	Electrometallurgical Ferroalloy Product Manufacturing
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
332115	Crown and Closure Manufacturing
332116	Metal Stamping
332117	Powder Metallurgy Part Manufacturing
331222	Steel Wire Drawing
332611	Spring (Heavy Gauge) Manufacturing
332612	Spring (Light Gauge) Manufacturing
332618	Other Fabricated Wire Product Manufacturing

Video Production and Distribution

Number of industries: 6

Description: The establishments in this cluster are primarily involved with the production and distribution of motion pictures and other video. The is includes specialized viewing venues such as drive-in theaters.

NAICS	NAICS Name
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries

Vulcanized and Fired Materials

Number of industries: 17

Description: This cluster contains firms that manufacture construction and other materials out of earthen substances such as clay, sand, and rubber at extremely high temperatures. The production processes create goods made of tile, brick, ceramic, glass, and rubber (including refractories and tires).

NAICS	NAICS Name
327111	Vitreous China Plumbing Fixture and China and Earthenware Bathroom Accessories Manufacturing
327112	Vitreous China, Fine Eartheware, and Other Pottery Product Manufacturing
327113	Porcelain Electrical Supply Manufacturing
327121	Brick and Structural Clay Tile Manufacturing
327122	Ceramic Wall and Floor Tile Manufacturing
327123	Other Structural Clay Product Manufacturing
327211	Flat Glass Manufacturing
327212	Other Pressed and Blown Glass and Glassware Manufacturing
327215	Glass Product Manufacturing Made of Purchased Glass
327992	Ground or Treated Mineral and Earth Manufacturing
327124	Clay Refractory Manufacturing
327125	Nonclay Refractory Manufacturing
326211	Tire Manufacturing (except Retreading)
326212	Tire Retreading
326220	Rubber and Plastics Hoses and Belting Manufacturing
326291	Rubber Product Manufacturing for Mechanical Use
326299	All Other Rubber Product Manufacturing

Water Transportation

Number of industries: 12

Description: This cluster contains all establishments involved in transporting people and goods over water. The cluster includes boat building, transportation, operations, and other support services.

NAICS	NAICS Name
483112	Deep Sea Passenger Transportation
483114	Coastal and Great Lakes Passenger Transportation
483212	Inland Water Passenger Transportation
483111	Deep Sea Freight Transportation
483113	Coastal and Great Lakes Freight Transportation

Water Transportation, Continued

NAICS	NAICS Name
483211	Inland Water Freight Transportation
488310	Port and Harbor Operations
488320	Marine Cargo Handling
488330	Navigational Services to Shipping
488390	Other Support Activities for Water Transportation
336611	Ship Building and Repairing
336612	Boat Building

Wood Products

Number of industries: 13

Description: The establishments in this cluster are primarily engaged in making upstream wood materials and manufacturing non-furniture wood products. Upstream establishments include sawmills, plywood and hardwood manufactures, cut stock manufacturers, and wood preservation services. Downstream establishments produce windows, doors, flooring, wood containers, prefabricated wood buildings and related products.

NAICS	NAICS Name
321113	Sawmills
321114	Wood Preservation
321912	Cut Stock, Resawing Lumber, and Planing
321211	Hardwood Veneer and Plywood Manufacturing
321212	Softwood Veneer and Plywood Manufacturing
321213	Engineered Wood Member (except Truss) Manufacturing
321214	Truss Manufacturing
321219	Reconstituted Wood Product Manufacturing
321911	Wood Window and Door Manufacturing
321918	Other Millwork (including Flooring)
321920	Wood Container and Pallet Manufacturing
321999	All Other Miscellaneous Wood Product Manufacturing
321992	Prefabricated Wood Building Manufacturing

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