

Diversified Manufacturing

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

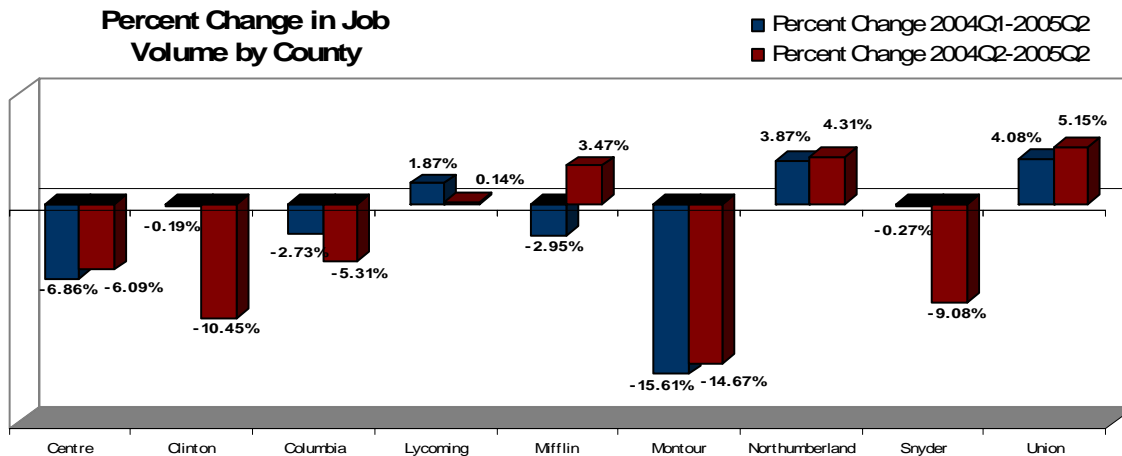
Industries Included in the Diversified Manufacturing Cluster

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

Labor Market Information

	1Q 2004	1Q 2005	2Q 2004	2Q 2005
Employer Units	581	587	574	581
Number of Jobs	32,555	32,276	32,697	32,007
Net Change in Job Volume	-	-279	-	-690
Net Percent Change in Job Volume	-	-0.86%	-	-2.11%
Percent of Total Region Jobs	13.71%	13.42%	13.32%	12.87%
Average Quarterly Wages	\$8,987	\$8,932	\$8,949	\$9,199
Net Change in Average Annual Wages	-	-\$55	-	\$250
Percent Change in Average Annual Wages	-	-0.61%	-	2.79%
Estimated Cluster Quarterly Payroll	\$293,000,000	\$288,000,000	\$293,000,000	\$294,000,000
State Location Quotient	1.40	1.40	1.38	1.37
Percent Change in State Location Quotient	-	0.00%	-	-0.72%
National Location Quotient	1.48	1.63	1.46	1.60
Percent Change in National Location Quotient	-	10.14%	-	9.59%

Percent Change in Job Volume by County



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

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Shift Share Analysis

	1Q 2004 to 1Q 2005		2Q 2004 to 2Q 2005		State/National growth share is a change in the number of jobs created locally due to state or national economic trends. Industry mix is the number of jobs attributable to the mix of faster or slower than average growing industries. Local share/competitiveness is a change in the number of jobs due to the competitive nature of the local industry.
	State	Nation	State	Nation	
National Growth Share	346	559	384	580	
Industry Mix	-710	-3,732	-837	-3,859	
Local Share / Competitiveness	85	2,894	-238	2,589	

Fastest Growing Industries 1Q 2004 to 1Q 2005

Motor vehicle body and trailer manufacturing
Other converted paper product manufacturing
Machine shops
Electronic instrument manufacturing
Ornamental and architectural metal products

Total Volume Increase: 933

Fastest Growing Industries 2Q 2004 to 2Q 2005

Other converted paper product manufacturing
Motor vehicle body and trailer manufacturing
Other industrial machinery manufacturing
Electronic instrument manufacturing
Machine shops

Total Volume Increase: 727

Projected Top 5 Occupations 2004 to 2010 High priority occupations are shown in *italics*.

Occupation	Net New Jobs	Jobs Due to Replacement	Educational Attainment Level
<i>First-Line Supervisors/Managers of Production and</i>	173	294	Work experience in a related field
Team Assemblers	115	627	Moderate-term on-the-job training
<i>Welders, Cutters, Solderers and Braziers</i>	80	163	Postsecondary vocational award
Packers and Packagers, Hand	149	255	Short-term on-the-job training
Helpers--Production Workers	48	284	Short-term on-the-job training

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Education

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

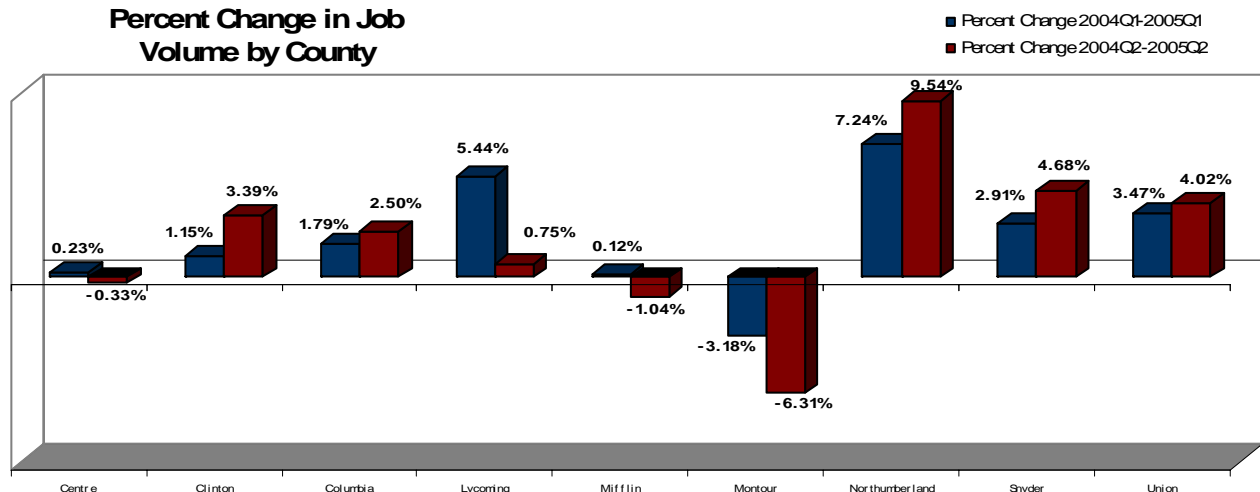
Industries Included in the Education Cluster

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

Labor Market Information

	<u>1Q 2004</u>	<u>1Q 2005</u>	<u>2Q 2004</u>	<u>2Q 2005</u>
Employer Units	949	945	941	948
Number of Jobs	40,583	41,389	41,473	41,993
Net Change in Job Volume	-	806	-	520
Net Percent Change in Job Volume	-	1.99%	-	1.25%
Percent of Total Region Jobs	17.09%	17.21%	16.89%	16.89%
Average Quarterly Wages	\$9,089	\$9,074	\$9,717	\$10,171
Net Change in Average Annual Wages	-	-\$15	-	\$454
Percent Change in Average Annual Wages	-	-0.17%	-	4.67%
Estimated Cluster Quarterly Payroll	\$369,000,000	\$376,000,000	\$403,000,000	\$427,000,000
State Location Quotient	1.36	1.35	1.37	1.36
Percent Change in State Location Quotient	-	-0.74%	-	-0.73%
National Location Quotient	0.72	1.40	0.73	1.41
Percent Change in National Location Quotient	-	94.44%	-	93.15%

Percent Change in Job Volume by County



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Education

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Shift Share Analysis

	1Q 2004 to 1Q 2005		2Q 2004 to 2Q 2005		State/National growth share is a change in the number of jobs created locally due to state or national economic trends. Industry mix is the number of jobs attributable to the mix of faster or slower than average growing industries. Local share/competitiveness is a change in the number of jobs due to the competitive nature of the local industry.
	State	Nation	State	Nation	
National Growth Share	431	697	488	735	
Industry Mix	563	-19,991	429	-20,412	
Local Share / Competitiveness	-188	20,101	-397	20,197	

Fastest Growing Industries 1Q 2004 to 1Q 2005

Colleges and universities
 Junior colleges
 Elementary and secondary schools
 School and employee bus transportation
 Child day care services

Total Volume Increase: 1,013

Fastest Growing Industries 2Q 2004 to 2Q 2005

Junior colleges
 Elementary and secondary schools
 All other schools and instruction
 Colleges and universities
 Engineering services

Total Volume Increase: 696

Projected Top 5 Occupations 2004 to 2010 High priority occupations are shown in *italics*.

Occupation	Net New Jobs	Jobs Due to Replacement	Educational Attainment Level
Team Assemblers	115	627	Moderate-term on-the-job training
Cabinetmakers and Bench Carpenters	150	196	Long-term on-the-job training
Woodworking Machine Setters, Operators and Tenders	128	148	N/A
Carpenters	339	313	Long-term on-the-job training
<i>Laborers and Freight, Stock, and Material Movers, Hand</i>	224	967	Short-term on-the-job training

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Health Care

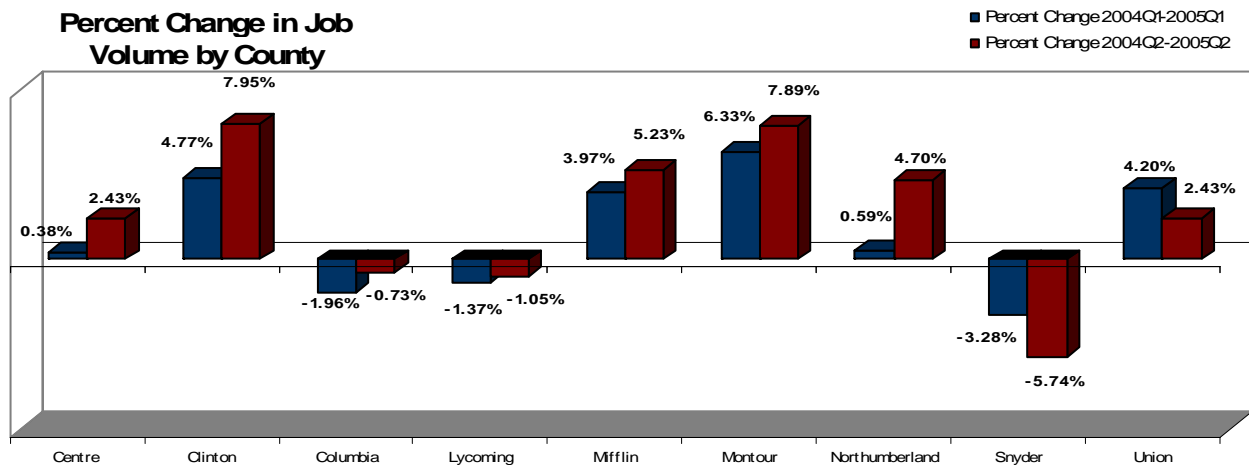
Analysis for the counties of Centre, Clinton, Columbia, Lycoming, Mifflin, Montour, Northumberland, Snyder and Union

Industries Included in the Health Care Cluster

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

Labor Market Information

	<u>1Q 2004</u>	<u>1Q 2005</u>	<u>2Q 2004</u>	<u>2Q 2005</u>
Employer Units	1,370	1,395	1,376	1,391
Number of Jobs	33,319	33,731	33,464	34,284
Net Change in Job Volume	-	412	-	820
Net Percent Change in Job Volume	-	1.24%	-	2.45%
Percent of Total Region Jobs	14.03%	14.02%	13.63%	13.79%
Average Quarterly Wages	\$8,634	\$8,778	\$8,644	\$8,964
Net Change in Average Annual Wages	-	\$144	-	\$320
Percent Change in Average Annual Wages	-	1.67%	-	3.70%
Estimated Cluster Quarterly Payroll	\$288,000,000	\$296,000,000	\$289,000,000	\$307,000,000
State Location Quotient	0.90	0.90	0.89	0.90
Percent Change in State Location Quotient	-	0.00%	-	1.12%
National Location Quotient	0.65	1.11	0.64	1.10
Percent Change in National Location Quotient	-	70.77%	-	71.88%



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Health Care

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Shift Share Analysis

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	<u>State</u>	<u>Nation</u>	<u>State</u>	<u>Nation</u>	
National Growth Share	354	572	393	593	
Industry Mix	74	-14,035	29	-14,055	
Local Share / Competitiveness	-16	13,875	397	14,282	

Fastest Growing Industries 1Q 2004 to 1Q 2005

General medical and surgical hospitals
Home health care services
Community care facilities for the elderly
Offices of physicians
Psychiatric and substance abuse hospitals

Total Volume Increase: 701

Fastest Growing Industries 2Q 2004 to 2Q 2005

General medical and surgical hospitals
Community care facilities for the elderly
Home health care services
Offices of physicians
Nursing care facilities

Total Volume Increase: 907

Projected Top 5 Occupations 2004 to 2010 High priority occupations are shown in *italics*.

Occupation	Net New Jobs	Jobs Due to Replacement	Educational Attainment Level
<i>Registered Nurses</i>	593	878	Associate's degree
<i>Nursing Aides, Orderlies and Attendants</i>	348	273	Short-term on-the-job training
<i>Licensed Practical and Licensed Vocational Nurses</i>	132	274	Postsecondary vocational award
<i>Home Health Aides</i>	309	91	Short-term on-the-job training
<i>Receptionists and Information Clerks</i>	469	342	Short-term on-the-job training

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Lumber and Wood Products

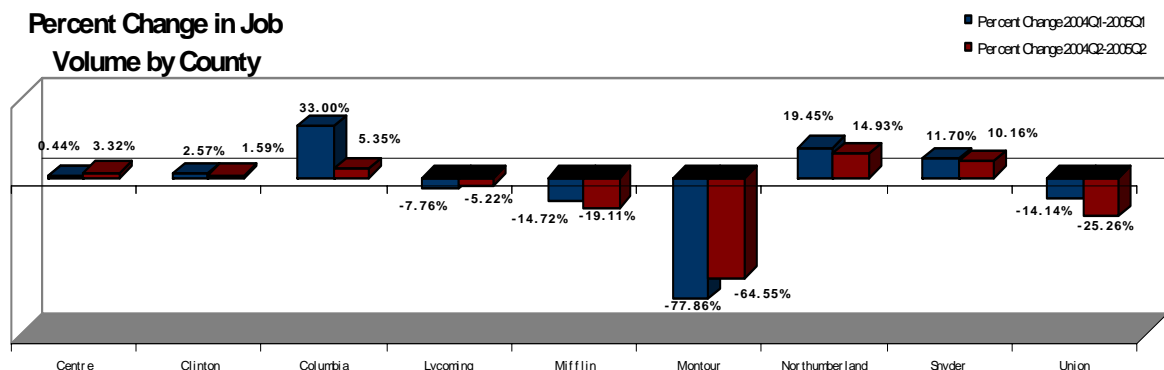
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Industries Included in the Lumber and Wood Products Cluster

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

Labor Market Information

	<u>1Q 2004</u>	<u>1Q 2005</u>	<u>2Q 2004</u>	<u>2Q 2005</u>
Employer Units	299	311	305	308
Number of Jobs	12,920	13,125	13,457	13,229
Net Change in Job Volume	-	205	-	-228
Net Percent Change in Job Volume	-	1.59%	-	-1.69%
Percent of Total Region Jobs	5.44%	5.46%	5.48%	5.32%
Average Quarterly Wages	\$7,383	\$7,555	\$7,697	\$8,134
Net Change in Average Annual Wages	-	\$172	-	\$437
Percent Change in Average Annual Wages	-	2.33%	-	5.68%
Estimated Cluster Quarterly Payroll	\$95,000,000	\$99,000,000	\$104,000,000	\$108,000,000
State Location Quotient	3.44	3.36	3.40	3.23
Percent Change in State Location Quotient	-	-2.33%	-	-5.00%
National Location Quotient	2.08	3.32	2.05	3.19
Percent Change in National Location Quotient	-	59.62%	-	55.61%



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Lumber and Wood Products

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	State	Nation	State	Nation	
National Growth Share	137	222	158	239	
Industry Mix	355	-4,881	290	-5,184	
Local Share / Competitiveness	-287	4,864	-676	4,717	

Fastest Growing Industries 1Q 2004 to 1Q 2005

Wood kitchen cabinet and countertop mfg.
Home centers
Sawmills and wood preservation
All other wood product manufacturing
Plywood and engineered wood product mfg.

Total Volume Increase: 772

Fastest Growing Industries 2Q 2004 to 2Q 2005

Wood kitchen cabinet and countertop mfg.
Sawmills and wood preservation
Home centers
Plywood and engineered wood product mfg.
Millwork

Total Volume Increase: 499

Projected Top 5 Occupations 2004 to 2010 High priority occupations are shown in *italics*.

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Team Assemblers	115	627	Moderate-term on-the-job training
<i>Cabinetmakers and Bench Carpenters</i>	150	196	Long-term on-the-job training
<i>Woodworking Machine Setters, Operators and Tenders</i>	128	148	Moderate-term on-the-job training
<i>Carpenters</i>	339	313	Long-term on-the-job training
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