



PROSPERITY FOR GREATER CHARLOTTE

2012 ~ 2017

Appendix A: Economic & Demographic Assessment for the Greater Charlotte Region



Project Supporters



The work that provided the basis for this publication was supported by funding under an award with the U.S. Department of Housing and Urban Development. The substance and findings of the work are dedicated to the public. The author and publisher are solely responsible for the accuracy of the statements and interpretations contained in this publication. Such interpretations do not necessarily reflect the views of the Government

Project Consulting Team



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Introduction

Introduction to the Project

Creation of the **Prosperity for Greater Charlotte** Comprehensive Economic Development Strategy recognizes today's reality that economic dependencies and competencies require cross sector and jurisdictional collaboration, acknowledging that the Greater Charlotte region is a complex system with various subsystems. Based on this overarching and interconnected existence, this project updates the Centralina Economic Development Commission EDD CEDS with a comprehensive economic development planning approach that also analyzes and incorporates the systems and strategies that support the goal of the Greater Charlotte Region as a globally competitive, vibrant and resilient bi-state region of communities.

The primary three organizations that comprise this regional economic zone of influence are the US EDA Economic Development Districts of the Centralina Economic Development Commission in North Carolina and Catawba Regional Council of Governments in South Carolina, and, in cooperation with both North Carolina and South Carolina Departments of Commerce, the bi-state coverage of the Charlotte Regional Partnership.

This project provides the five year update to the 2007 Centralina Comprehensive Economic Development Strategy (CEDS) No Boundaries report and provides supporting research and data to the Catawba Regional Council of Government for their CEDS update in compliance with the requirements of the U.S. Department of Commerce Economic Development Administration, (EDA). The project is funded in part by the U.S. Department of Commerce, Economic Development Administration and "CONNECT Our Future", a \$4.9 million HUD Sustainable Communities Regional Planning Grant through a federal HUD-DOT-EPA Partnership for Sustainable Communities coalition. The CEDS Update findings, regional strategies and related county community assessments will provide input and deliver crucial economic foundation and data to the "CONNECT Our Future" planning process and ultimate outcomes.

WHY THIS PLAN?

This plan is premised on transcending traditional jurisdictional boundaries and barriers in a collaborative paradigm to assemble the most accurate and place based reality for the economic strategies and future of the entire Greater Charlotte Region.

Successful economic development today requires a plan to be in place. In fact, site selectors and companies now look to a region's plans as an indicator of where a community plans to be, how it plans to get there, and which institutions are accepting responsibility. Regions with cohesive and realistic plans will grow in a more organized fashion and better leverage the assets in each of the component counties or jurisdictions that comprise the area of economic influence.

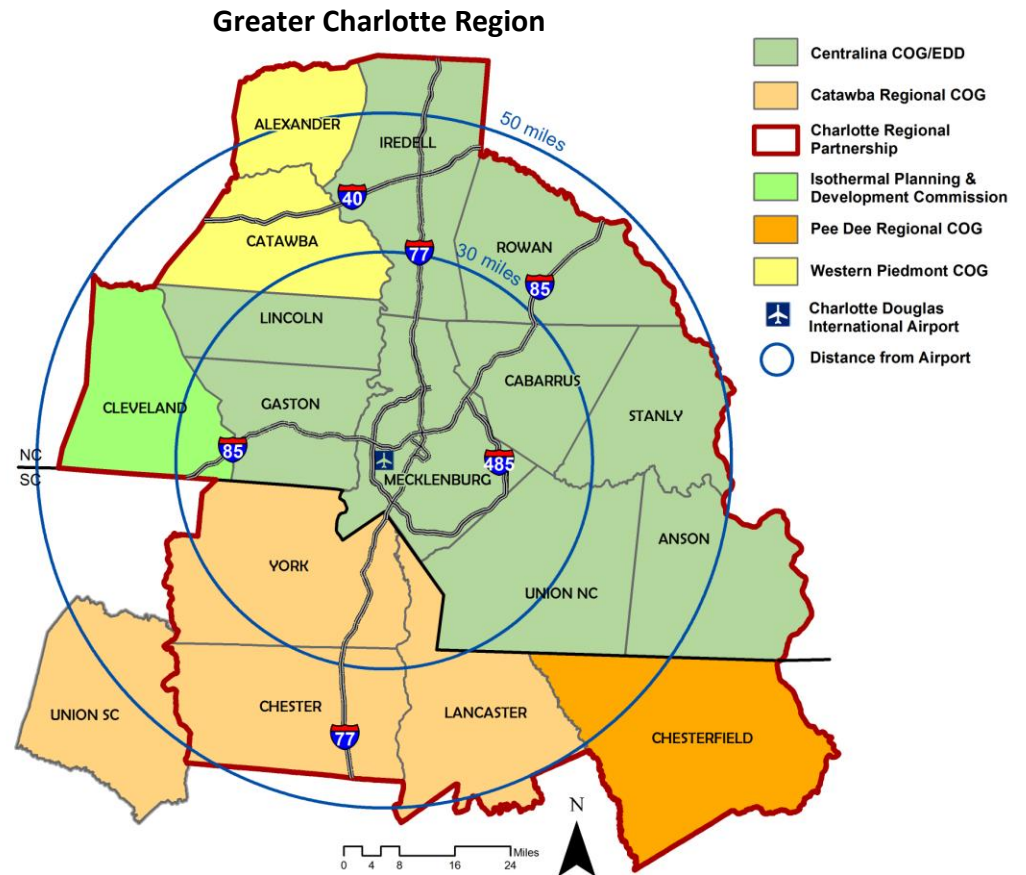


Rutherford Street in Wadesboro, NC

The **Prosperity for Greater Charlotte** project and the HUD “CONNECT Our Future” Economic Development Group collaboratively partners the Centralina Council of Governments, Catawba Regional Council of Governments, Centralina Economic Development Commission, and the Charlotte Regional Partnership in an innovative, integrated approach that is essential to support the region’s future growth and prosperity.

The Centralina EDD Comprehensive Economic Development Strategy outlines an approach to coordinate growth and prosperity that builds on the region’s strengths, prioritizes key regional industry clusters, and emphasizes collaboration. A key component of this strategic planning process is to help the regional economy boost its job growth rate by linking the region’s workforce skills and strengths, education assets, and infrastructure to the needs of high-growth and emerging industries. The strategy will support and guide priorities for economic development in the region in order to create jobs, build community, and strengthen the local economy.

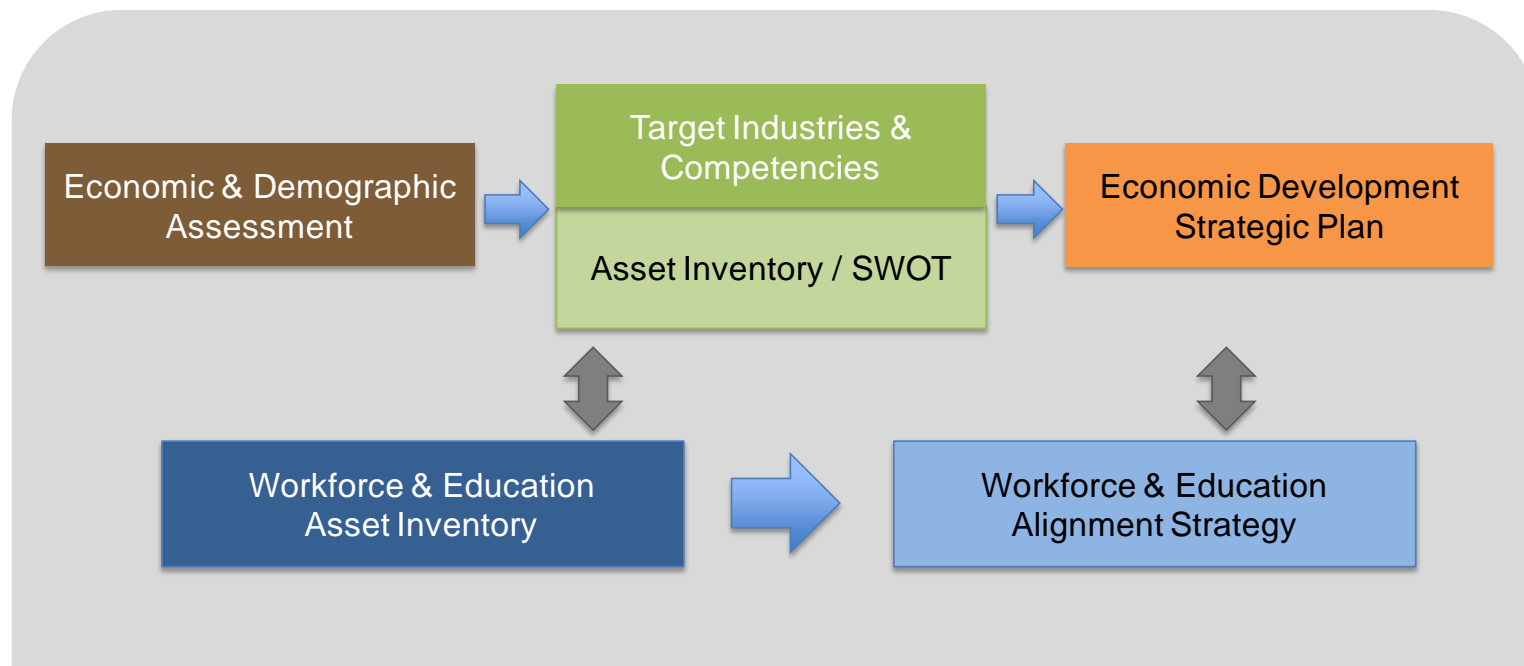
The use of “Greater Charlotte Region” in the language of this report is reflective of the larger collaborative analysis by the Centralina EDD and the additional inter-relational and centralized impacts of the 50 mile regional zone. However, all report findings and priorities with goals, objectives, and tactics are specifically endorsed and adopted only for the EDA approved nine county jurisdiction of the Centralina Economic Development Commission (EDD). This report in no way replaces or supplants adjacent EDD CEDS jurisdiction plans that share partial coverage within the economic zone of influence defined and analyzed for this report.



In anticipation of dynamic economics that will drive future global competitiveness; our innovative strategic plan design dictated inclusion of seventeen counties in the global competency analysis, parallel with the Charlotte USA footprint. This collaborative community network shown on the map illustrates the fifty mile radius economic zone that constitutes the Greater Charlotte 21st Century Global Region.

The diagram below shows the components and process of the Centralina Comprehensive Economic Development Strategy (CEDS):

**Process Diagram
Comprehensive Economic Development Strategy**



The first phase of the Comprehensive Economic Development Strategy has two primary components: the *Economic & Demographic Assessment* and the *Asset Inventory / SWOT*.

The *Economic & Demographic Assessment* examined historical growth trends in the Greater Charlotte Region and the individual counties. Economic datasets presented and discussed include overall jobs, employment by industry, unemployment, shift-share analysis of regional industries, payroll, average salaries, and gross regional product. Demographic data presented includes overall population trends, age distribution, and incomes.

The second component, *Asset Inventory / SWOT*, inventories and evaluates key economic development assets in the Greater Charlotte Region. The report identifies assets in several categories: Workforce & Education, Entrepreneurship & Innovation, Infrastructure, Business Climate, and Quality of Life. For each of these topics, the report includes a SWOT (Strengths, Weaknesses, Opportunities, & Threats) assessment summarizing the key takeaways for the Centralina Comprehensive Economic Development Strategy.

Alongside these components, the project team will complete a *Workforce & Education Asset Inventory*. This report inventories all college and K-12 educational programs; identifies existing workforce skills and competencies; and examines national and global workforce skill trends. This inventory provides an essential perspective for understanding regional strengths and industry objectives.

The second phase of the project builds on the previous reports, identifying and validating target industry clusters for the Greater Charlotte Region. The *Target Industries & Competencies* component includes a cluster analysis of regional industries, examining growth trends, location quotients, and employment bubble charts. The project team evaluated potential target industries by filtering candidates through numerous criteria, including the regional asset fit, national industry trends, and match to regional economic development goals. The *Target Industries & Competencies* analysis culminates in a list of target industry recommendations and profiles for each industry.

The project culminates in three strategic plans: the *Centralina Comprehensive Economic Development Strategy* and the integrally linked Greater Charlotte region *Workforce & Education Alignment Strategy* with the additionally supported, but independently completed, *Catawba Region Comprehensive Economic Development Strategy* of the Catawba Regional Council of Governments.



NC Research Campus, Kannapolis

The economic plan defines priorities and goals, objectives, and tactics to enhance the 9-county Centralina EDD region's overall business environment and maximize target cluster development. The workforce recommendations will be customized to match the 17-county region's target industries and competencies, specifically identifying future workforce skills needs for each target sub-cluster and planning to bridge gaps in the existing regional education and training pipeline to ensure each target is matched with a steady supply of qualified workers.



Charlotte Motor Speedway

CEDS Centralina Economic Development District Committee

The CEDC EDD Committee is comprised of the Centralina Economic Development Commission Board (shown below) who has initiated and facilitated the project with support of an expanded CEDS Advisory Council (shown on next page).

Centralina Economic Development Commission (CEDC)

Chairman
George Dunlap
Mecklenburg County BOC

Vice-Chairman
Bill Thunberg
Alexander Zachary Jewelers

Treasurer/Secretary
Joel Randolph
Randolph & Son Builders

President/Ex-Officio
Mike Manis, CED Director
Centralina Council of Governments

Ex-Officio
Jim Prosser, Executive Director
Centralina Council of Governments

Local Government Representatives

Anson County
Jarvis Woodburn, Commissioner

City of Charlotte
LaWana Mayfield, Council Member

Gaston County
Joe Carpenter, Commissioner

Iredell County
Tracy Jackson, Deputy Manager

Lincoln County
George Arena, Commissioners

Town of Mooresville
Miles Atkins, Mayor

Rowan County
Jeanie Moore, Rowan-Cabarrus Community College
Robert Van Geons, Salisbury-Rowan Economic Development Commission

Stanly County
Tony Dennis, Commissioner
Paul Stratos, Stanly County Economic Development Commission

Business & Industry Representatives

Thomas R. Anderson, Mountain Island Fitness

Chuck Boyle, Boyle Consulting Engineers, PLLC

Chris Carney, NC Legislature

Mark Brady, First Trust Bank, Mooresville

Robby Carney, Mooresville-South Iredell Economic Development Corporation

Astrid Chirinos, Latin American Chamber of Commerce-Charlotte

Tim Gause, Duke Energy

Manuel Rey, Fifth Third Bank

Dan Ramirez, Nova Engineering

Fred Sparger, Retired South Piedmont Community College

CEDS Advisory Council (expanded members to EDD committee)

In addition to the CEDC EDD Committee, an additional group of regional community leaders contributed their added passion and expertise to the formation of a CEDS Advisory Council that led, advised and facilitated project activities throughout the duration of the CEDS update project:

Bill Anderson, Executive Director, Meck Ed

Jimmy Chancey, Director, Career & Technical Education, Charlotte-Mecklenburg Schools

Vanessa Goeschl, VP, Marketing & Research, Charlotte Regional Partnership

Stuart Hair, Existing Industry Coordinator, North Carolina Department of Commerce

Donny Hicks, Executive Director, Gaston County EDC

Brad Howard, Chairman, Mooresville-South Iredell Economic Developer Council

Jack Keiser, Director of Planning, City of Gastonia

Jonathan Marshall, Deputy County Manager, Cabarrus County

Samantha Moose, Existing Industry Services, Cabarrus Economic Development Corporation

Steve Partridge, Executive Director, Charlotte Works

Michael Realon, Career Development Coordinator, Olympic Community of Schools

Mary Vickers-Koch, Dean, Corporate & Continuing Education, Central Piedmont Community College

Paul Wetenhall, President, Ventureprise

Anna Lu Wilson, VP of Business Services, Cabarrus EDC

Richard Zollinger, VP for Learning, Central Piedmont Community College

Geographic Area of Focus

For the purposes of this project, an established economic zone of influence was incorporated that is greater than the Centralina EDD\CEDS that covers nine NC counties centered on Charlotte, North Carolina. The Greater Charlotte Region encompasses 17 counties in North Carolina and South Carolina and multiple regional economic development organizations:

- Centralina Council of Governments (NC),
- Catawba Regional Council of Governments (SC)
- Charlotte Regional Partnership (Charlotte USA)
- Western Piedmont Council of Governments (NC)
- Isothermal Planning & Development Commission (NC)
- Pee Dee Regional Council of Government (SC)

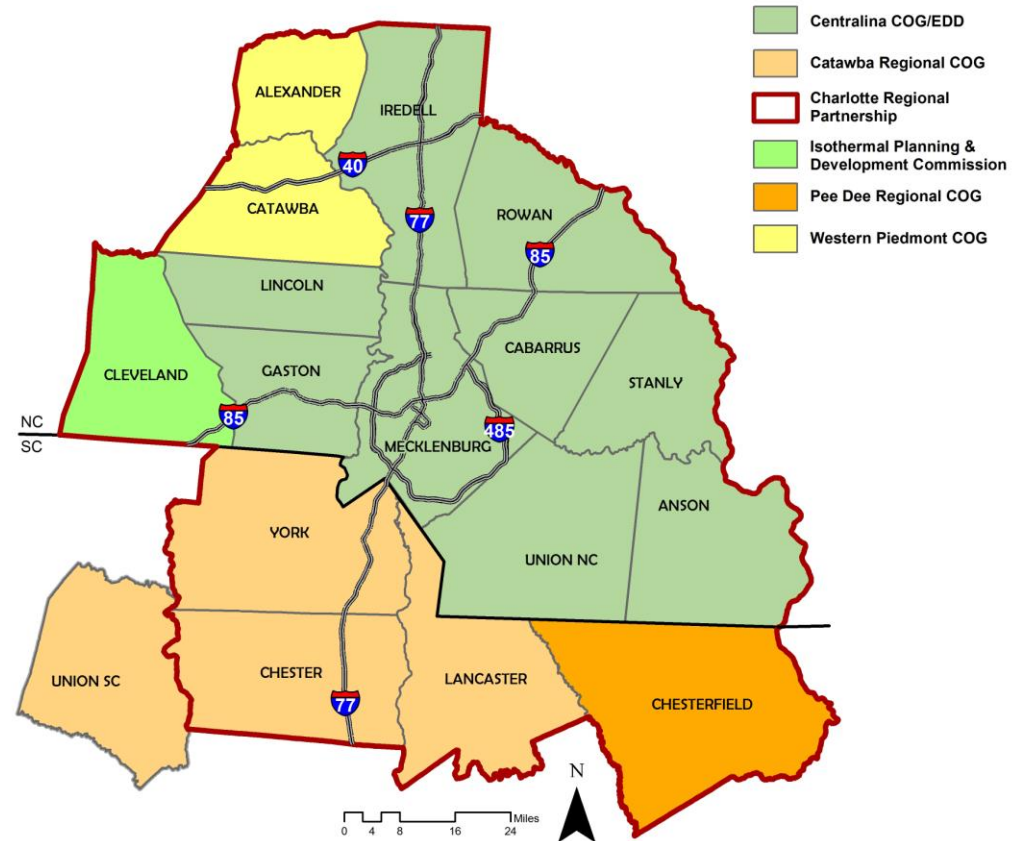
The nationally and globally embraced “Charlotte USA” footprint recognizes the economic and demographic influences of the Combined Metropolitan Statistical Area (CBSA) of “Charlotte-Gastonia-Salisbury, NC” 13 regional counties and the additional 4 counties contiguous to this geographic US Census zone. This project examines the composite Greater Charlotte Region and also provides breakout sub-reports of trends in each individual county.

The Greater Charlotte Region is comprised of the following counties:

North Carolina

- Alexander County
- Anson County
- Cabarrus County
- Catawba County
- Cleveland County
- Gaston County
- Iredell County
- Lincoln County
- Mecklenburg County
- Rowan County
- Stanly County
- Union County

Greater Charlotte Region



South Carolina

- Chester County
- Chesterfield County
- Lancaster County
- Union County
- York County

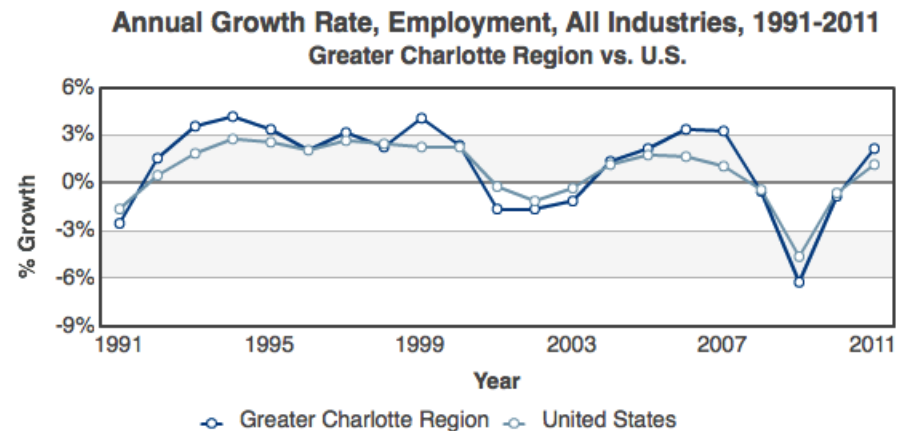
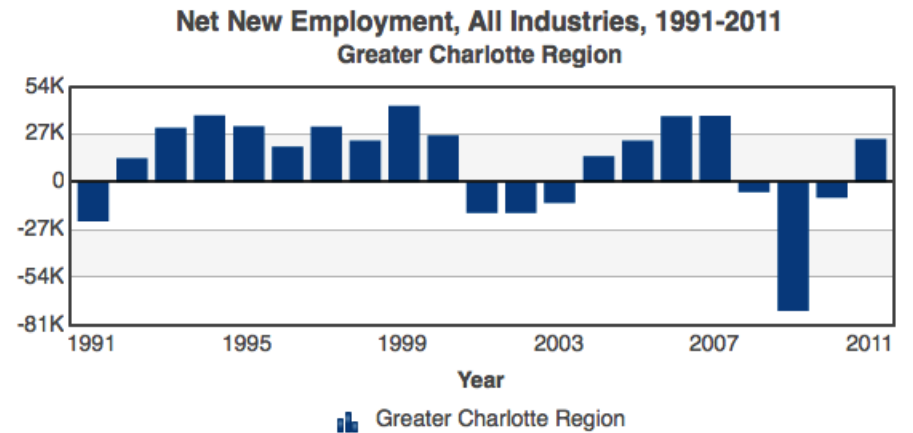
Section 1:

Regional Review

Employment Growth

The Greater Charlotte Region was one of the hardest hit regions of the US during the recent recession. During the recession years of 2008 to 2010, nearly 88,000 jobs were lost in the region, representing over 7% of the employment base before the recession. Job creation returned in 2011 with 24,000 jobs created.

Historically, the region has grown faster than the US during boom years (1990s, 2006-2007) but on par or slightly worse during bust years (2001-2002, 2010). In 2010, the region underperformed the US with a -6.2% growth rate but rebounded faster in 2011 with a 2.2% growth rate.



Industry Performance

The region’s largest three industries (“super sectors” as defined by the Bureau of Labor Statistics) are:

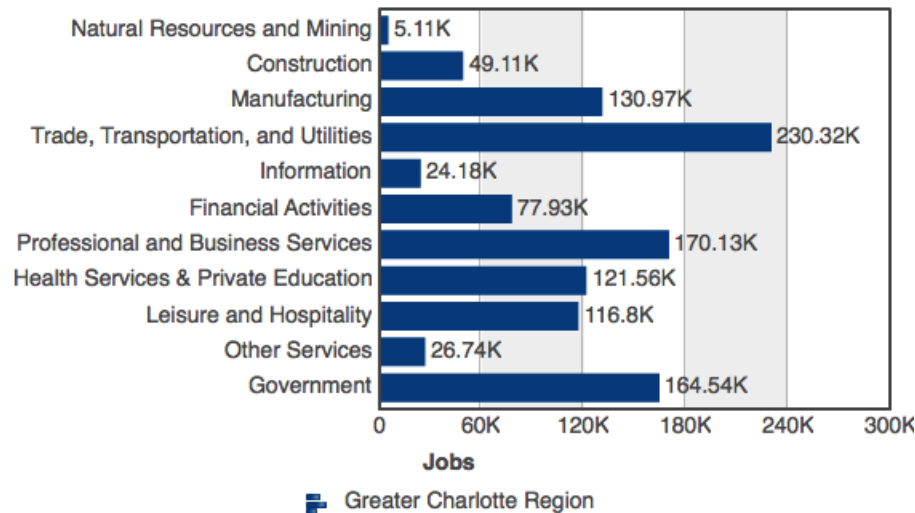
- Trade, Transportation, and Utilities; 230,000 jobs
- Professional and Business Services; 170,000 jobs
- Government; 165,000 jobs

Over the past five years, four industries created net new jobs in the region:

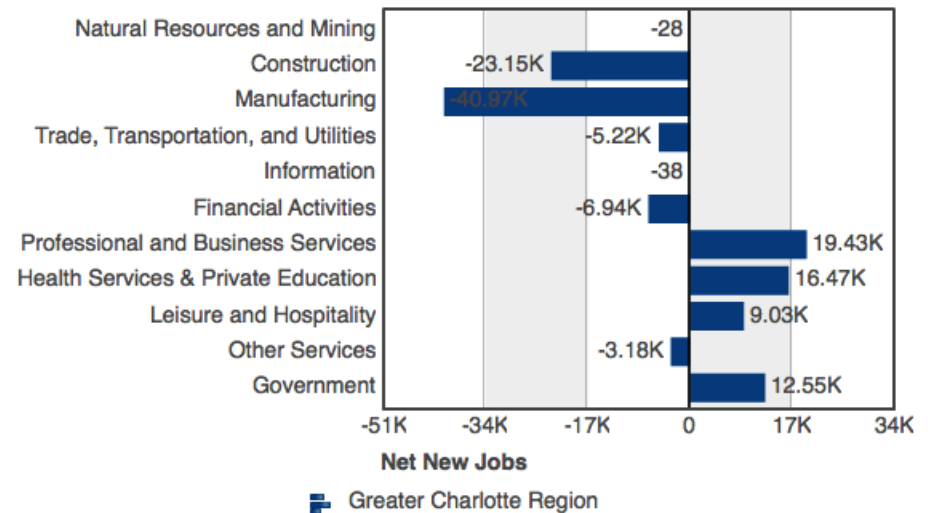
- Professional and Business Services; 19,400 new jobs
- Health Services & Private Education; 16,500 new jobs
- Government; 12,600 new jobs
- Leisure and Hospitality; 9,030 new jobs

More jobs were lost in the Manufacturing industry (41,000) in the previous five years than all other industries combined, despite the significant downturn in the region’s financial and construction industries. On the following page we provide a description of these industries and sub-industries they comprise.

Employment by Industry, 2011
Greater Charlotte Region



New Jobs, 2006-2011
Greater Charlotte Region



Major Industry Definitions

Natural Resources and Mining: Consists of operations engaged in growing crops, raising or catching animals, harvesting timber, well operations, extracting minerals and liquids, and all related mining and farming support activities.

Construction: Consists of operations engaged in the construction of buildings and engineering projects, such as highways and utility systems, and the preparation of sites for construction.

Manufacturing: Consists of operations engaged in the transformation or assembly of raw materials and components into new products.

Trade, Transportation, and Utilities: Consists of operations engaged in the retail sale of goods to consumers, the wholesale of goods, the transportation of goods and people, the warehousing of goods, and the utility provision of electric power, natural gas, steam, water, and sewage removal. Transportation includes air, rail, water, road, and pipeline.

Information: Consists of operations engaged in producing information and cultural products, communications, and data processing. This includes traditional publishing, software development, film production, broadcasting, Internet service provision, web search portals, and telecommunications.

Financial Activities: Consists of operations engaged in financial transactions, insurance provisions, and rental and leasing of property.

Professional and Business Services: Consists of operations engaged in specialized and support services, including legal, accounting, architecture, engineering, computer systems, management, office administration, document preparation, security, and cleaning.

Health Services and Private Education: Consists of operations engaged in the provision of education and health services, including private schools, colleges, training centers, hospitals, doctors' offices, social work, and childcare.

Leisure and Hospitality: Consists of operations engaged in providing entertainment, cultural activities, recreational services, lodging, and dining, including museums, historical sites, sports facilities, hotels, and restaurants.

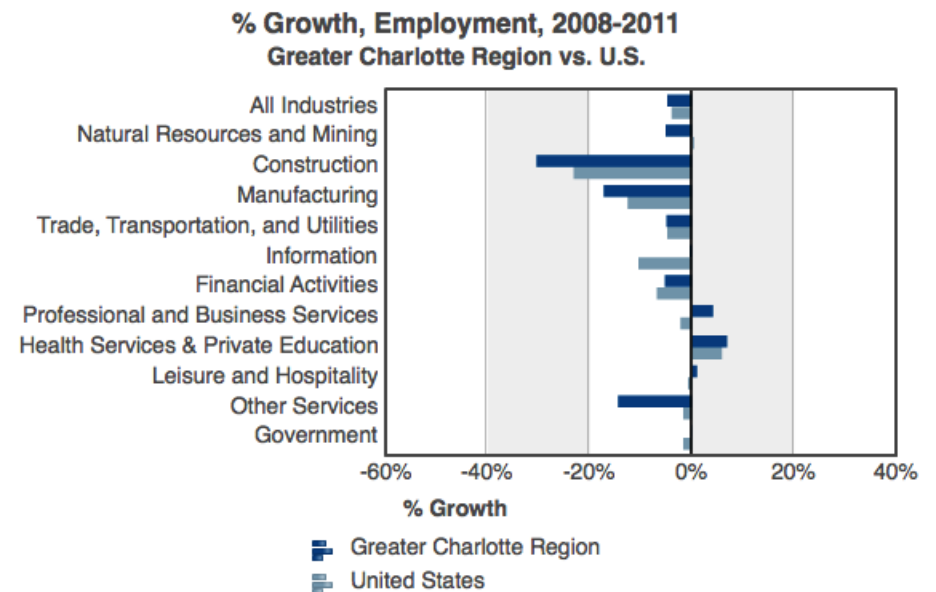
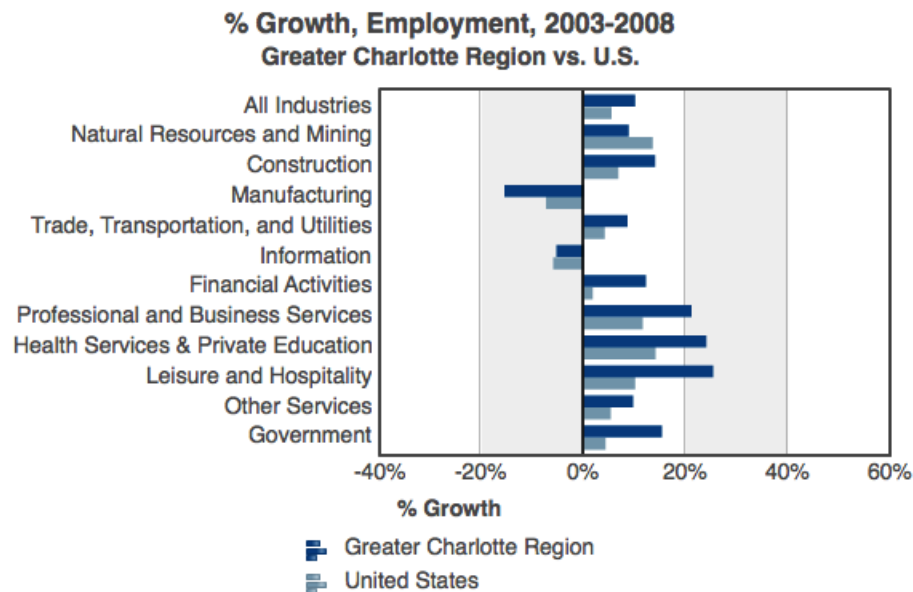
Other Services: Consists of operations not specifically included in other categories, including equipment repair, religious activities, non-profits, and dry cleaning.

Government: Consists of operations administered by federal, state, and local government agencies, including the military, public schools, and public hospitals.

Comparing industry performance during expansionary periods (2003-2008) against performance during the recession (2008-2011) provides an interesting perspective on the competitiveness of industries – which did better or worse, or which are exhibiting consistent growth or declines regardless of the direction of the economy.

In the growth years from 2003-2008, most industries in the Greater Charlotte Region outpaced US growth rates. The following industries grew the fastest (in order): Leisure & Hospitality (25%); Health Services & Private Education (24%); and Professional & Business Services (21%). Financial Activities grew 12% during this period, far outpacing US growth in the industry. Manufacturing jobs were lost at a much faster rate (-16%) than the US (-7%).

In the three years since 2008, only four industries created jobs in the region: Health Services & Private Education (7%); Professional & Business Services (4%); Leisure & Hospitality (1%); and Government (0.2%). Health Services & Private Education continues to show consistent positive growth in the region, and this growth has outpaced the nation. In contrast, Professional & Business Services and Leisure & Hospitality grew in the region during the recession while they shrank in the US.



On the following page, additional detail is provided the region’s largest and fastest growing industries at the 4-digit NAICS level.

Top 15 Private Sector Industries by 4-Digit NAICS

GREATER CHARLOTTE REGION

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7222	Limited-Service Eating Places	45,604
7221	Full-Service Restaurants	41,596
5511	Management of Companies and ...	35,543
5613	Employment Services	32,801
5221	Depository Credit Intermedia...	28,727
6211	Offices of Physicians	20,687
4451	Grocery Stores	19,830
4529	Other General Merchandise St...	19,021
2382	Building Equipment Contractors	17,474
6221	General Medical and Surgical...	17,383
5617	Services to Buildings and Dw...	15,932
5416	Management, Scientific, and ...	14,188
4841	General Freight Trucking	13,288
4521	Department Stores	11,975
6231	Nursing Care Facilities	11,079

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
7222	Limited-Service Eating Places	4,429
5511	Management of Companies and ...	3,696
4529	Other General Merchandise St...	3,372
5416	Management, Scientific, and ...	3,199
6211	Offices of Physicians	2,857
5614	Business Support Services	2,435
7139	Other Amusement and Recreati...	2,022
6216	Home Health Care Services	1,859
6111	Elementary and Secondary Sch...	1,599
7221	Full-Service Restaurants	1,429
6233	Community Care Facilities fo...	1,264
4931	Warehousing and Storage	1,264
6113	Colleges, Universities, and ...	1,262
4251	Wholesale Electronic Markets...	1,181
6212	Offices of Dentists	1,136

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
7222	Limited-Service Eating Places	5,400
5416	Management, Scientific, and ...	5,228
5221	Depository Credit Intermedia...	5,089
6211	Offices of Physicians	4,414
4529	Other General Merchandise St...	3,478
6241	Individual and Family Services	3,270
7221	Full-Service Restaurants	2,990
5617	Services to Buildings and Dw...	2,771
5613	Employment Services	2,765
2382	Building Equipment Contractors	2,684
5511	Management of Companies and ...	2,423
5614	Business Support Services	2,354
7139	Other Amusement and Recreati...	2,306
6221	General Medical and Surgical...	1,984
4931	Warehousing and Storage	1,738

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3131	Fiber, Yarn, and Thread Mills	12.7
3132	Fabric Mills	10.8
3371	Household and Institutional ...	5.9
7112	Spectator Sports	4.6
3314	Nonferrous Metal (except Alu...	3.8
5152	Cable and Other Subscription...	3.6
3359	Other Electrical Equipment a...	3.3
5182	Data Processing, Hosting, an...	2.9
3272	Glass and Glass Product Manu...	2.5
3222	Converted Paper Product Manu...	2.4
3332	Industrial Machinery Manufac...	2.4
3329	Other Fabricated Metal Produ...	2.4
5222	Nondepository Credit Interme...	2.3
5511	Management of Companies and ...	2.2
3336	Engine, Turbine, and Power T...	2.2

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
6111	Elementary and Secondary Sch...	49%
5614	Business Support Services	47%
6214	Outpatient Care Centers	38%
7224	Drinking Places (Alcoholic B...	37%
6216	Home Health Care Services	37%
3119	Other Food Manufacturing	33%
6219	Other Ambulatory Health Care...	30%
5416	Management, Scientific, and ...	29%
6113	Colleges, Universities, and ...	25%
5611	Office Administrative Services	23%
7139	Other Amusement and Recreati...	23%
4529	Other General Merchandise St...	22%
5619	Other Support Services	20%
5612	Facilities Support Services	19%
6212	Offices of Dentists	19%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
5612	Facilities Support Services	50%
6241	Individual and Family Services	41%
5416	Management, Scientific, and ...	37%
5614	Business Support Services	31%
5611	Office Administrative Services	29%
5152	Cable and Other Subscription...	27%
5239	Other Financial Investment A...	27%
6214	Outpatient Care Centers	26%
5616	Investigation and Security S...	25%
4232	Furniture and Home Furnishin...	22%
5619	Other Support Services	22%
6212	Offices of Dentists	22%
6211	Offices of Physicians	21%
4931	Warehousing and Storage	21%
7139	Other Amusement and Recreati...	21%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 1,500 jobs.

Top 15 Private Sector Industries by 4-Digit NAICS

GREATER CHARLOTTE WITHOUT MECK

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
9036	Education and Hospitals (Loc...	48,784
9039	Local Government, Excluding ...	27,369
7222	Limited-Service Eating Places	25,013
7221	Full-Service Restaurants	20,506
4529	Other General Merchandise St...	15,008
5613	Employment Services	12,851
6221	General Medical and Surgical...	12,206
4451	Grocery Stores	11,348
5511	Management of Companies and ...	10,668
6211	Offices of Physicians	10,564
3371	Household and Institutional ...	9,815
9026	Education and Hospitals (Sta...	8,681
2382	Building Equipment Contractors	8,678
6231	Nursing Care Facilities	8,091
5617	Services to Buildings and Dw...	8,051

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
4529	Other General Merchandise St...	2,956
5511	Management of Companies and ...	1,999
9039	Local Government, Excluding ...	1,980
7222	Limited-Service Eating Places	1,713
5614	Business Support Services	1,607
4931	Warehousing and Storage	1,334
5416	Management, Scientific, and ...	1,333
9026	Education and Hospitals (Sta...	996
6216	Home Health Care Services	991
6111	Elementary and Secondary Sch...	844
9011	Federal Government, Civilian	782
6233	Community Care Facilities fo...	772
6211	Offices of Physicians	608
6212	Offices of Dentists	527
6214	Outpatient Care Centers	514

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
9036	Education and Hospitals (Loc...	3,875
4529	Other General Merchandise St...	2,553
7222	Limited-Service Eating Places	2,350
9039	Local Government, Excluding ...	2,322
6211	Offices of Physicians	1,957
5511	Management of Companies and ...	1,787
6241	Individual and Family Services	1,689
5222	Nondepository Credit Interme...	1,654
5416	Management, Scientific, and ...	1,521
5617	Services to Buildings and Dw...	1,485
6221	General Medical and Surgical...	1,443
5614	Business Support Services	1,348
4931	Warehousing and Storage	1,330
2382	Building Equipment Contractors	1,267
6231	Nursing Care Facilities	1,156

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3131	Fiber, Yarn, and Thread Mills	24.9
3132	Fabric Mills	18.0
3371	Household and Institutional ...	11.1
3325	Hardware Manufacturing	9.5
3133	Textile and Fabric Finishing...	9.1
3314	Nonferrous Metal (except Alu...	7.4
3359	Other Electrical Equipment a...	6.2
3322	Cutlery and Handtool Manufac...	5.8
7112	Spectator Sports	5.7
3272	Glass and Glass Product Manu...	4.9
3312	Steel Product Manufacturing ...	4.5
3329	Other Fabricated Metal Produ...	4.1
3363	Motor Vehicle Parts Manufact...	3.8
3252	Resin, Synthetic Rubber, and...	3.8
3149	Other Textile Product Mills	3.6

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
5614	Business Support Services	84%
6111	Elementary and Secondary Sch...	77%
7224	Drinking Places (Alcoholic B...	66%
3312	Steel Product Manufacturing ...	51%
5416	Management, Scientific, and ...	49%
6219	Other Ambulatory Health Care...	41%
3118	Bakeries and Tortilla Manufa...	37%
7131	Amusement Parks and Arcades	32%
5619	Other Support Services	31%
5621	Waste Collection	30%
5611	Office Administrative Services	28%
4243	Apparel, Piece Goods, and No...	28%
6216	Home Health Care Services	27%
4931	Warehousing and Storage	27%
6214	Outpatient Care Centers	27%

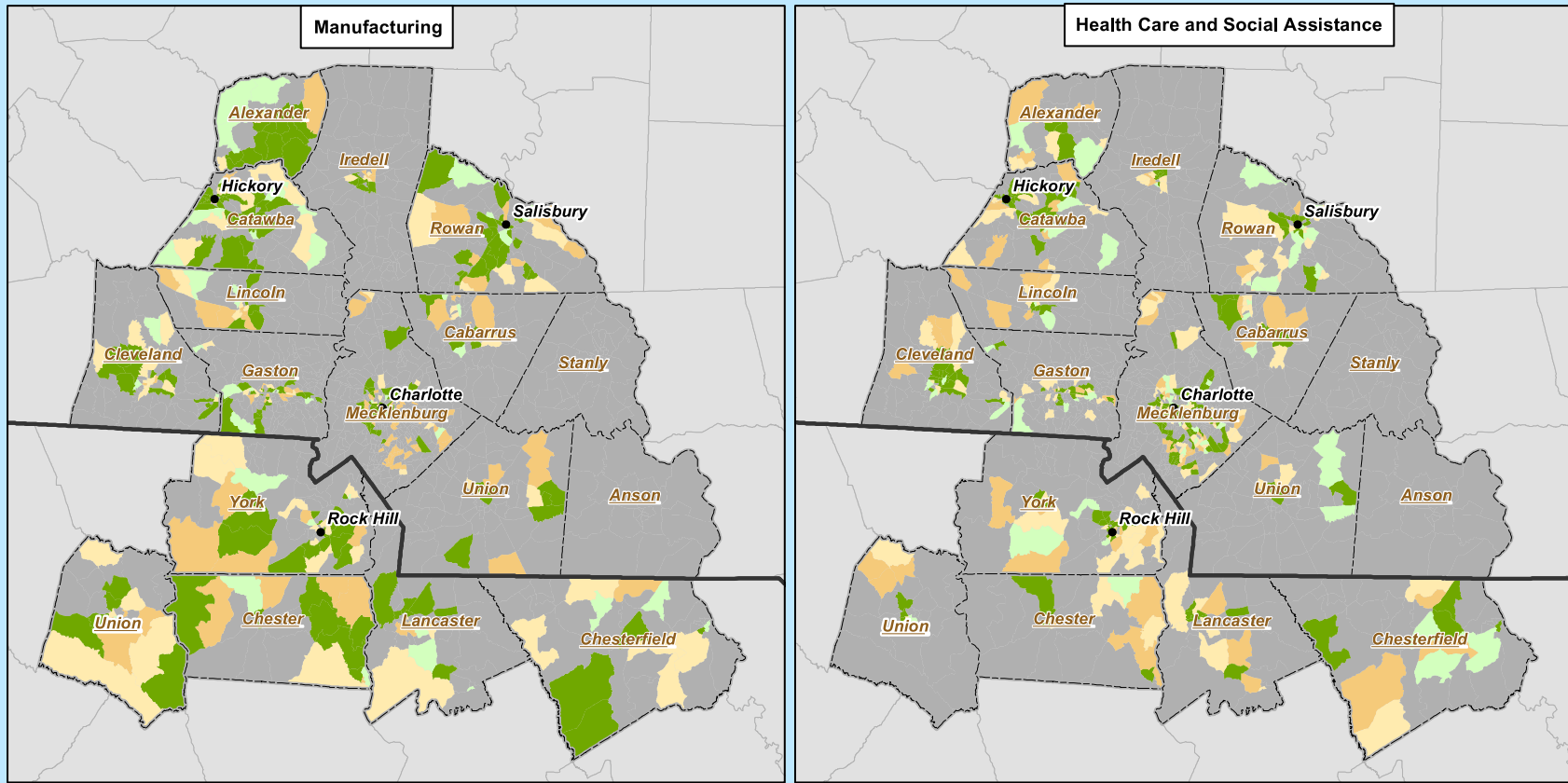
FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
5614	Business Support Services	38%
5416	Management, Scientific, and ...	37%
6241	Individual and Family Services	37%
4884	Support Activities for Road ...	34%
6242	Community Food and Housing, ...	31%
3312	Steel Product Manufacturing ...	30%
5222	Nondepository Credit Interme...	30%
6214	Outpatient Care Centers	29%
5619	Other Support Services	27%
3273	Cement and Concrete Product ...	27%
5611	Office Administrative Services	26%
7224	Drinking Places (Alcoholic B...	25%
6213	Offices of Other Health Prac...	25%
5171	Wired Telecommunications Car...	23%
2383	Building Finishing Contractors	22%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 500 jobs.

**NAICS Sectors - Workplace
by Block Group**



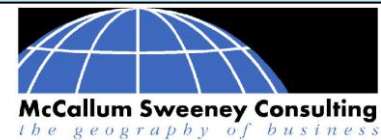
Number of Jobs

- 0
- 1 to 5
- 6 to 25
- 26 to 50
- 50+



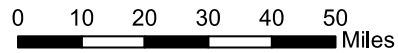
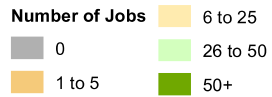
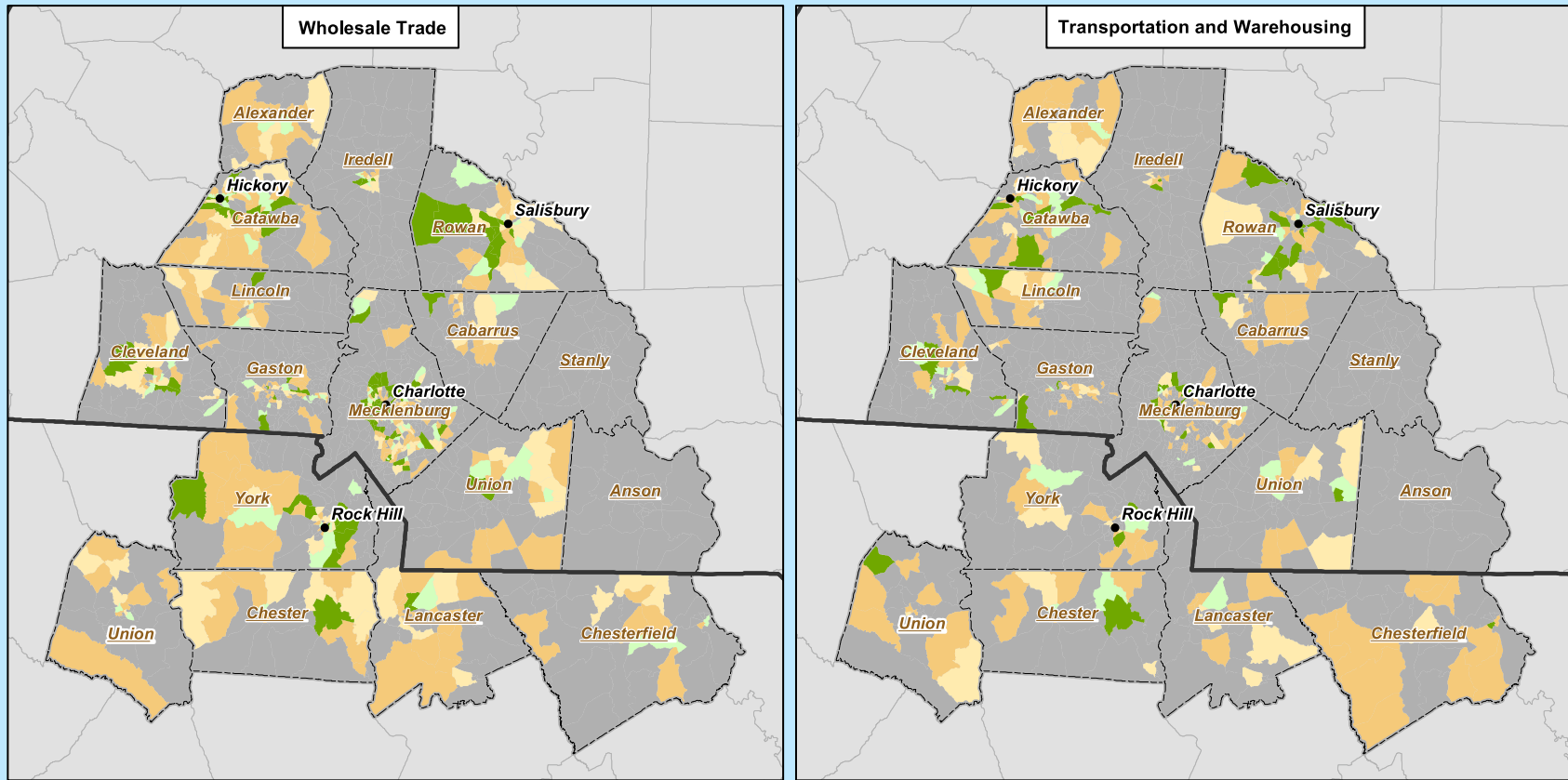
0 10 20 30 40 50 Miles

Source: Census 2010 - LED/On the Map
Projection: Florida State Plane
Geographic Data Source: ESRI, 2010
Map Composition: MSC, 2012

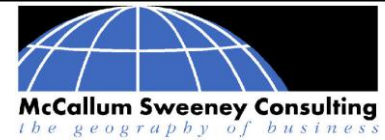


Cen07

**NAICS Sectors - Workplace
by Block Group**



Source: Census 2010 - LED/On the Map
 Projection: Florida State Plane
 Geographic Data Source: ESRI, 2010
 Map Composition: MSC, 2012



Cen06

Shift-Share Analysis

Shift-share analysis offers a unique way to evaluate industry competitiveness in a region relative to the US. The process splits growth into its component parts to reveal how local industry performance compares to national trends. The three components of growth are:

- **U.S. Economy Share**: The share of a local industry's growth in the local economy resulting from overall growth in the U.S. economy.
- **U.S. Industry Share**: The share of a local industry's growth in the local economy resulting from industry growth at the national level above and beyond overall national growth.
- **Local Industry Share**: The growth portion of a local industry above and beyond national trends (the previous two components). Local Industry Share is the component that highlights a local industry's competitiveness.

Explanation of the Methodology

A hypothetical example reveals how shift-share numbers are calculated: Assume that employment in the local construction industry grew 6%, while the overall U.S. economy grew 2%, and the national construction industry grew 3%. In this situation, the U.S. Economy Share would be 2% (the actual rate); the U.S. Industry Share would be 1% (the portion above the 2% overall U.S. Economy growth); and the Local Industry Share would be 3% (the difference).

The Local Industry Share indicates relative performance of a local industry, revealing whether the local industry has been advancing or declining relative to national trends. These Share percentages can then be translated into actual jobs created to demonstrate the number of new jobs attributable to improvements in local competitiveness. In the shift-share charts on the following page, each industry's net employment gain is broken into the three components. These components are additive, i.e. they show how many jobs were created for each factor (US Economy, US Industry, Local Industry), and when added together, they equal the net new job creation total for the industry.

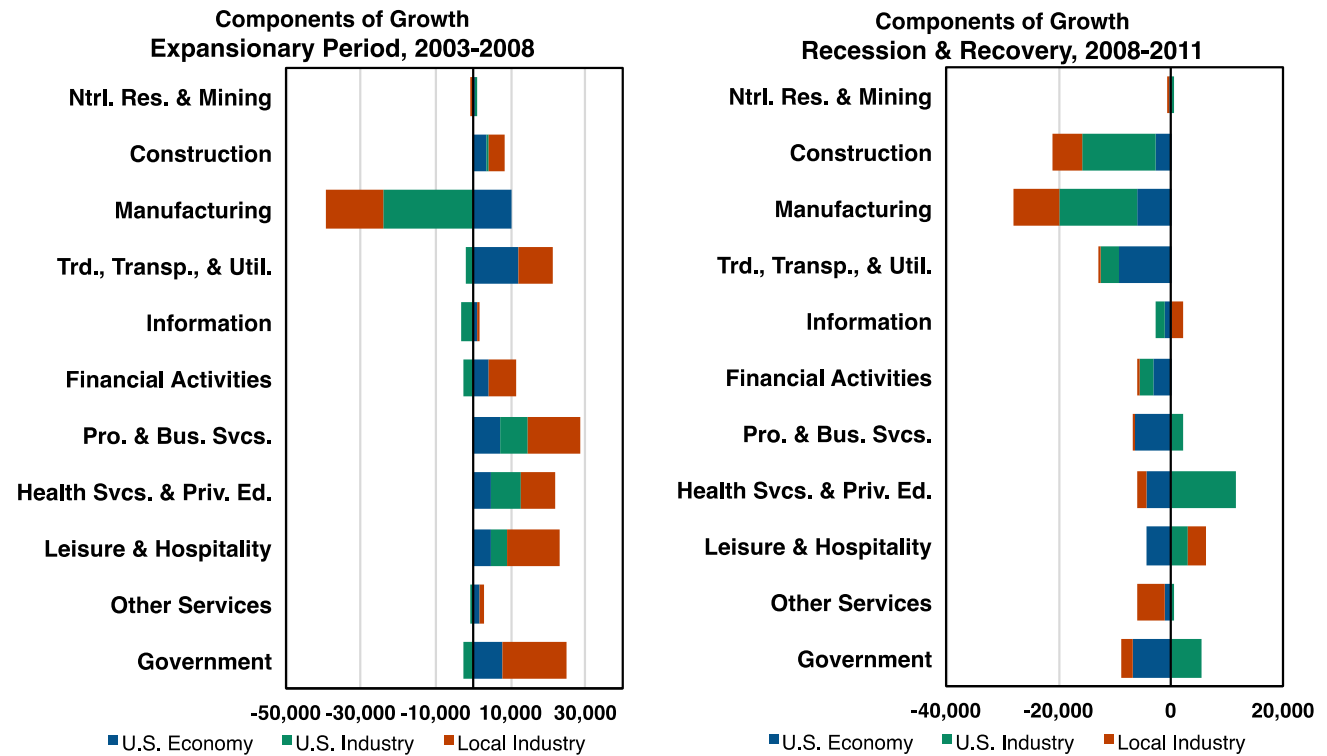
For example, the US Economy Share of manufacturing may result in the loss of -200 jobs (i.e. the effects of the overall national economy led to the loss of manufacturing jobs in a community); the US Industry Share may equate to a loss of -100 jobs (i.e. the effects of the overall manufacturing industry led to a loss of manufacturing jobs in a community); and the Local Industry Share may account for a gain of +200 jobs (i.e. the local manufacturing industry led to the creation of manufacturing jobs in a community). These three components combine for a net job creation of -100 in the local manufacturing industry, but the Local Industry Share had a positive job creation effect, despite net job losses.

Shift-share analysis provides a level of understanding of local industry competitiveness that goes a step deeper than examining job growth rates. How is it helpful? For example, positive employment growth in a local industry such as Health Services may appear to be something to be celebrated (and therefore selected as a community’s target industry), but shift-share analysis might show that this growth is more of a reflection of national trends (not unique to the community and therefore insufficient reason to select as a target industry). Similarly, a shrinking local industry may actually be performing better than national trends but feeling the influence of industry dynamics beyond local control. This dynamic would suggest that a shrinking industry might still remain a target, or might require a stronger retention/expansion program.

The shift-share analysis in the side chart displays the positive and negative growth effects of the three components for the Greater Charlotte Region.

The orange bars are the most important part of the analysis, indicating the Local Industry Share and when job changes are due to local competitiveness (superior performance).

Shift Share Analysis, Greater Charlotte Region, 2003-2011



The two charts above show the Shift Share components for the Greater Charlotte Region during the growth period from 2003-2008 and since the start of the recession from 2008-2011.

During the Expansionary Period (2003-2008, chart on the left):

- Local effects (orange bars) had a significant positive effect on job growth in almost all sectors, including: Professional & Business Services; Financial Activities; Leisure & Hospitality; Health Services & Private Education; Government; Trade, Transportation, & Utilities; and Construction. This means that the Greater Charlotte Region enjoyed superior performance across a wide swath of industries during the boom years from 2003 to 2008.
- The Manufacturing cluster saw the largest job losses during the expansionary period, but the majority of these losses were due to factors of the US Industry. The Greater Charlotte Region Industry Share only accounted for 38% of job losses in this industry. This indicates that despite an overall loss of over 29,000 manufacturing jobs, the Greater Charlotte Region's manufacturing sector is still relatively competitive, with much of the downturn due to trends in the overall US manufacturing industry.

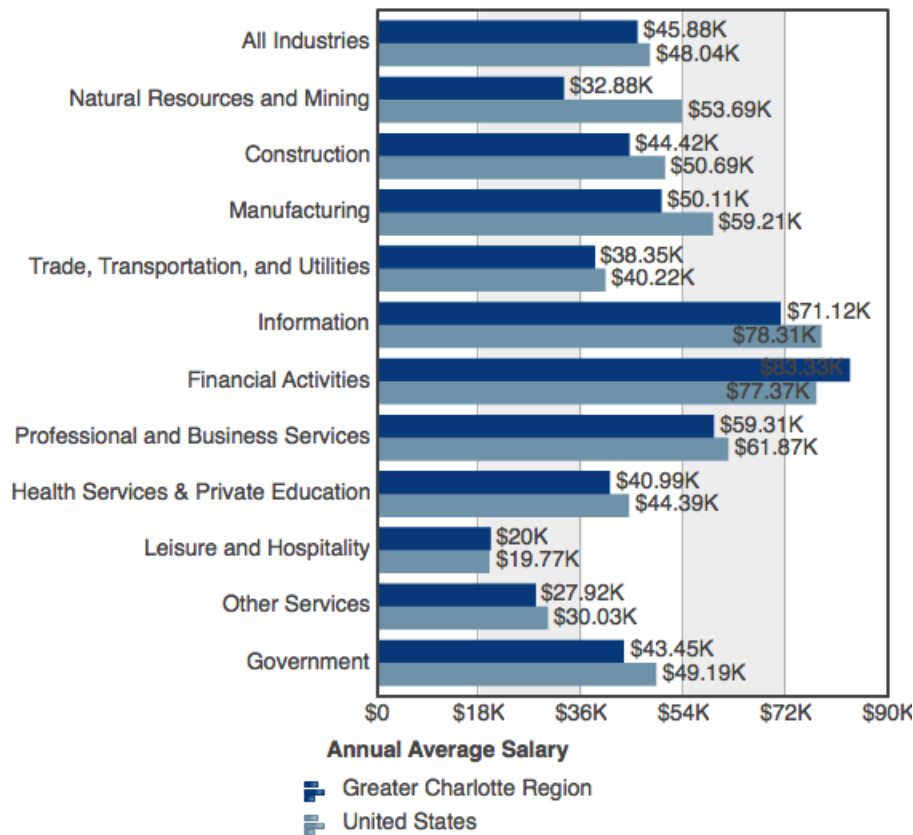
During the Recession & Recovery Period (2008-2011):

- Most industries suffered declining competitiveness, i.e. most local effects (orange bars) are found on the left side of the axis. The two industries that continued to see competitiveness improvements (positive local effects) were Information and Leisure & Hospitality. Strong job growth in the Health Services industry is revealed to be primarily due to growth seen in the industry across the entire US, not unique to the region.

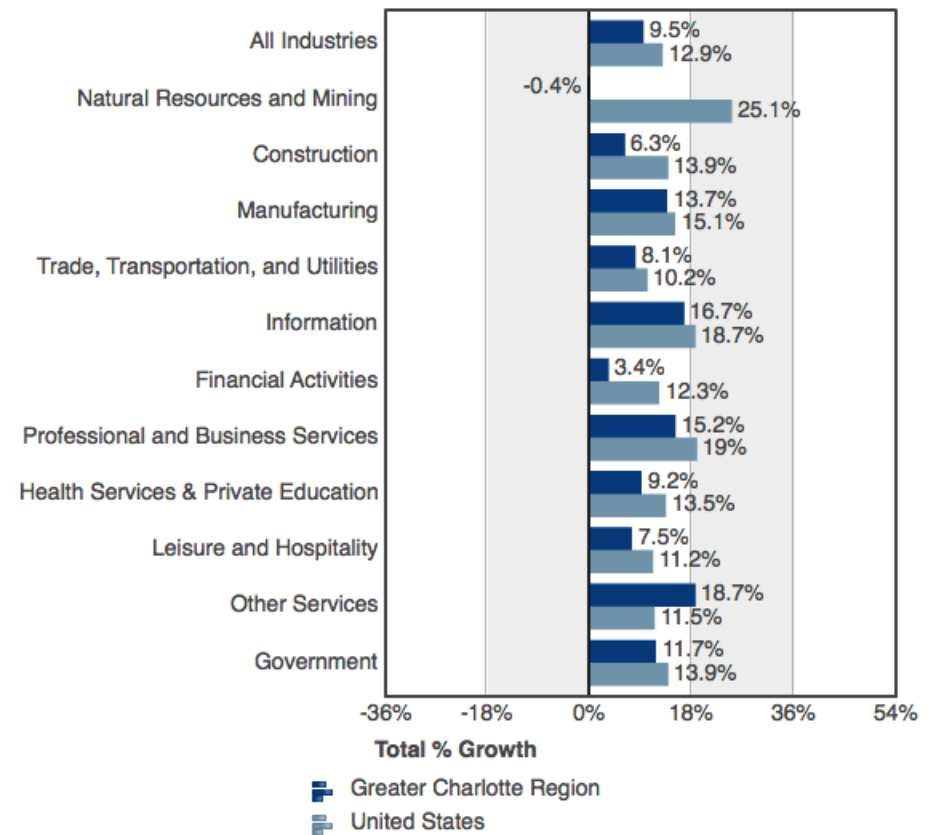
Average Salary Level by Industry

The average salary in the Greater Charlotte Region is slightly below the US average. The regional average salary was \$45,900 in 2011 compared to \$48,000 in the US, and it grew 10% from 2006-2011 (slightly less than the US). All industries have salaries that are lower than their US levels, with the exception of Financial Activities.

Average Salary by Industry, 2011
Greater Charlotte Region vs. U.S.



Salary Growth by Industry, 2006-2011
Greater Charlotte Region vs. U.S.



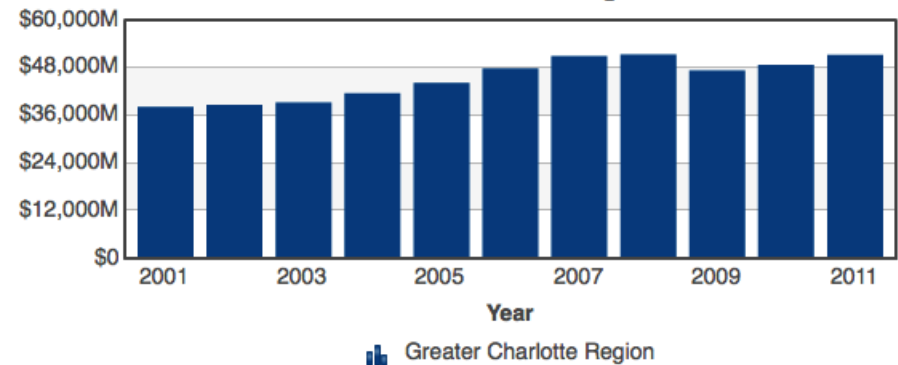
Payroll Growth

Total payroll in the region reached \$51.3 billion in 2011, which is a return to the pre-recession peak (\$51.4 billion in 2008).

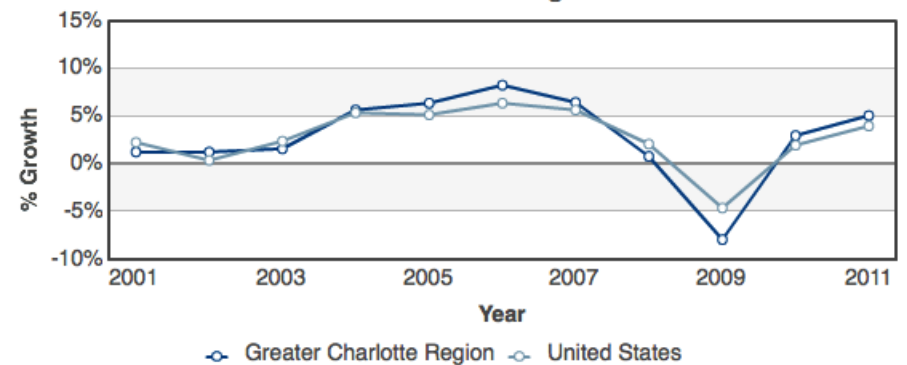
Growth in total payroll in the Greater Charlotte Region outpaced the US during the expansionary period of the mid-2000's but fell further during the recession.

The recession initially had a larger effect on payrolls in the region than the US, with total payroll dropping 8% in 2009 (the only year payrolls fell) compared to 5% for the US. Payroll growth returned in 2010, a year before job growth returned. The region's recent recovery in payroll has been at a faster pace than the US.

**Total Payroll, All Industries, 2001-2011
Greater Charlotte Region**



**Payroll Growth Rate, All Industries, 2001-2011
Greater Charlotte Region vs. U.S.**



Gross Regional Product

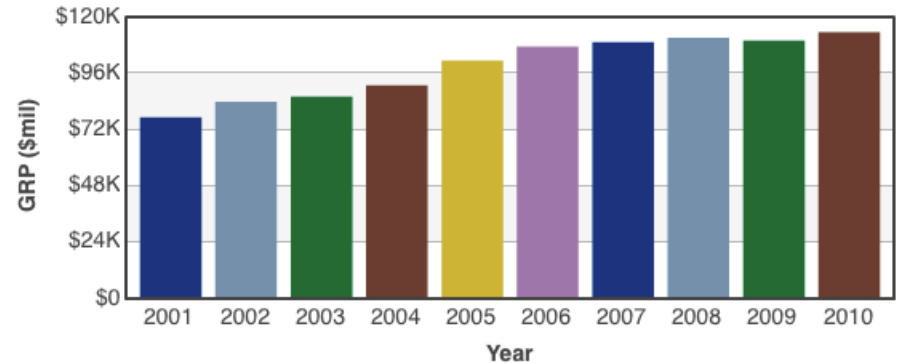
Gross Regional Product (GRP) represents the total economic output of a region and is only available at the Metropolitan Statistical Area (MSA) geographic level, which includes the following six counties: Anson, Cabarrus, Gaston, Mecklenburg, Union and York.

Gross Regional Product for the Charlotte MSA reached a new peak of \$114 billion in 2010. The five largest industry components were:

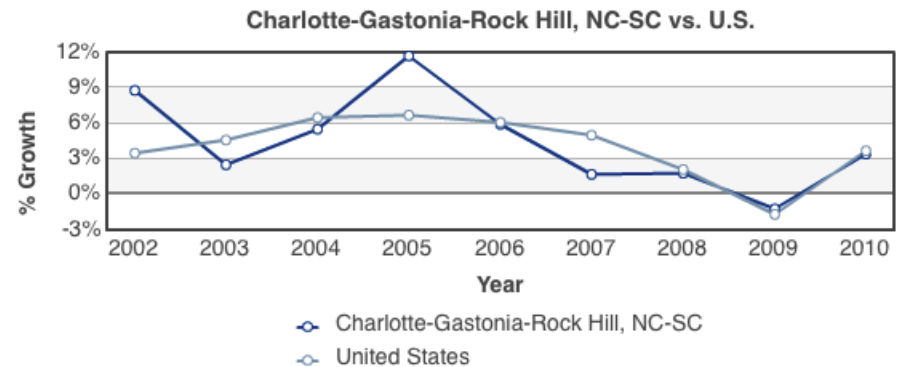
- Financial Activities: \$39.6 billion
- Trade, Transportation, & Utilities: \$17.7 billion
- Professional & Business Services: \$14.1 billion
- Manufacturing: \$13.0 billion
- Health Services & Private Education: \$5.7 billion

During the expansionary period, the GRP of the Charlotte MSA at times outpaced the US and at others underperformed but overall had steady growth. Similar to regional payrolls, GRP only shrank in 2009 and turned positive again in 2010.

Gross Regional Product, All industry total, 2001-2010
Charlotte-Gastonia-Rock Hill, NC-SC



Growth in Gross Regional Product, All industry total, 2002-2010
Charlotte-Gastonia-Rock Hill, NC-SC vs. U.S.

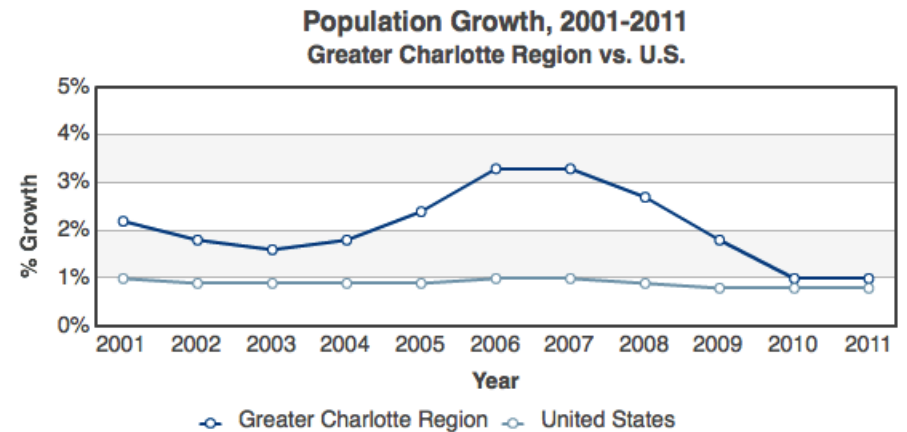
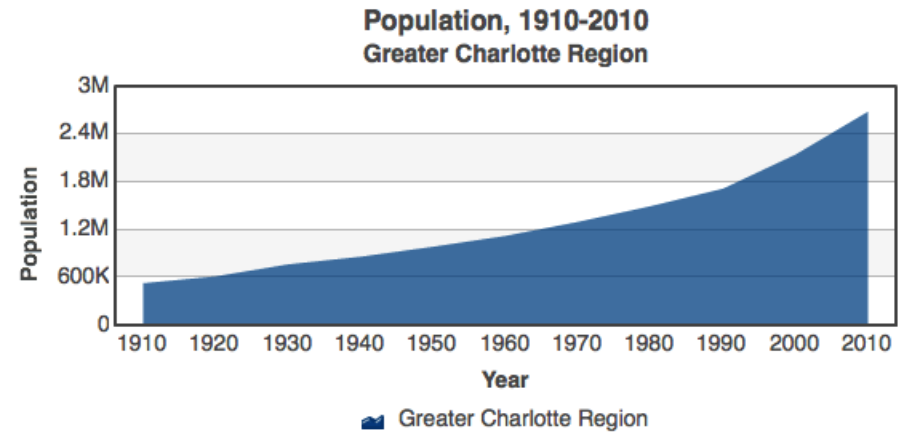


Population Growth

The Greater Charlotte Region has grown its population in every decade for the last 100 years. The pace of increase jumped dramatically in the 1990s, when growth average 25% for the decade versus 16% growth in previous decades.

During the 2000's, population growth continuously outpaced the US, often at double and triple national growth rates. Population growth was especially high during the housing boom from 2005 through 2008.

Since the initial onset of the recession, population growth rates have fallen steadily, reaching ten year lows of 1% in 2010 and 2011, barely above the US rate of 0.8%.



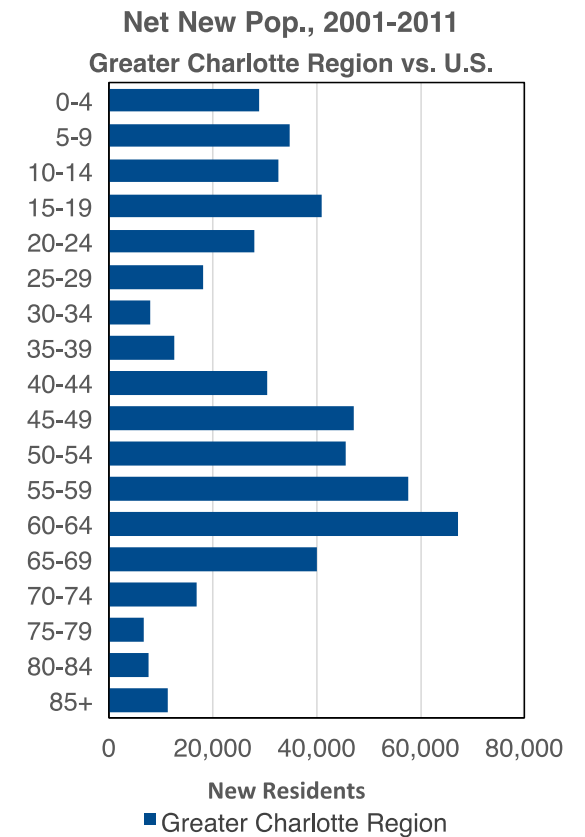
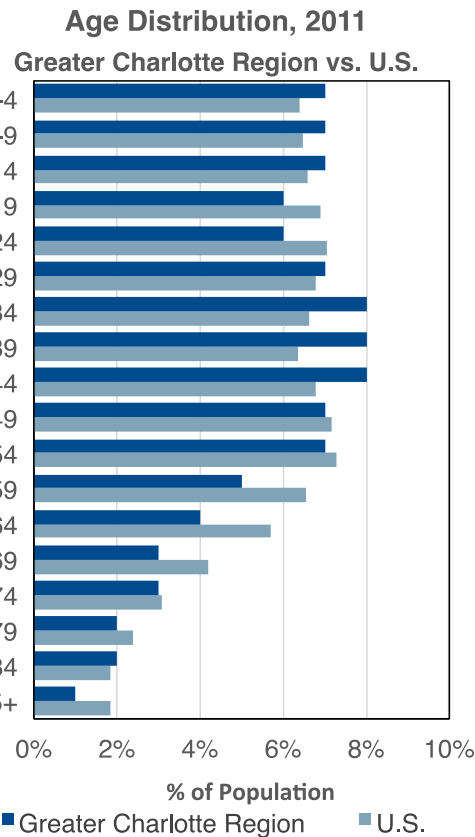
Age Distribution

The Greater Charlotte Region has a larger share of families with young children than the US, but the largest growth in the past decade has occurred among those aged 55-64.

The Greater Charlotte Region currently has a relatively large share of residents aged 25 to 44 years and under 14 years. The region's college age population is relatively small. Retirees and near-retirees (age 55 and older) also represent a smaller portion of the population than seen nationally.

From 2001 to 2011, the largest share of new population growth in the Greater Charlotte Region occurred among residents aged 45 to 69. This age group accounted for 48% of new residents during this period. Another 31% of new residents were under 25 years of age.

The smallest growth in population occurred among residents aged 25 to 39 and those aged 70 and older.

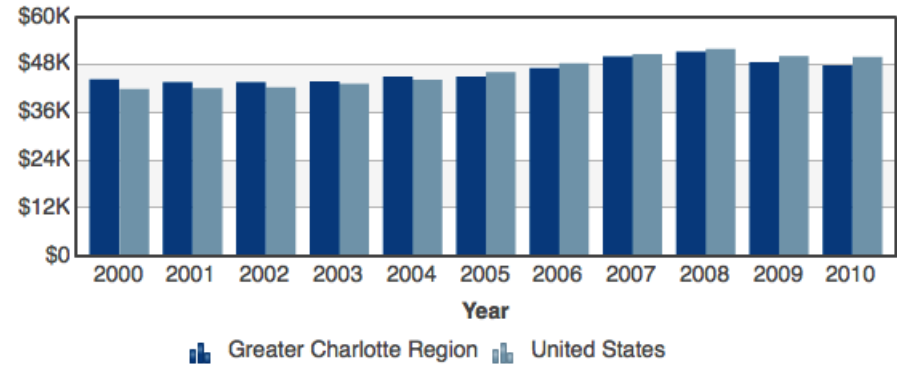


Incomes

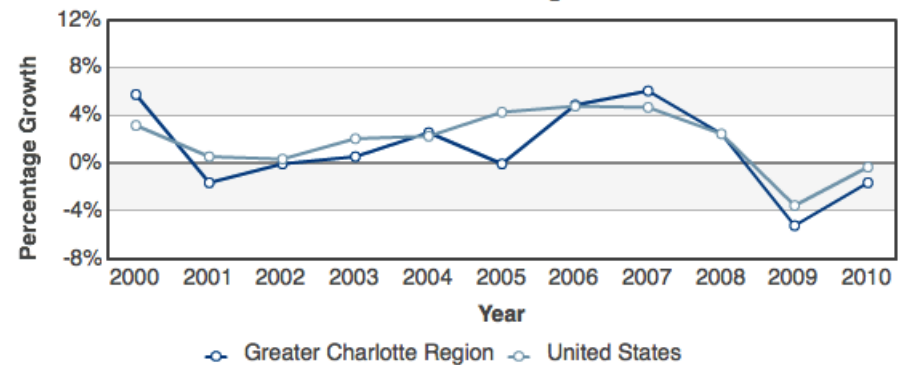
In 2000, the median household income in the Greater Charlotte Region was higher than the US, but by 2005 local median household incomes dropped below the national level.

Income growth outpaced the US during the boom years prior to the recession, but incomes also dropped more rapidly than the US from 2008 to 2010. Median household income in the Greater Charlotte Region dropped 7% during this period, falling to \$48,000 in 2010.

**Median Household Income, 2000-2010
Greater Charlotte Region vs. U.S.**



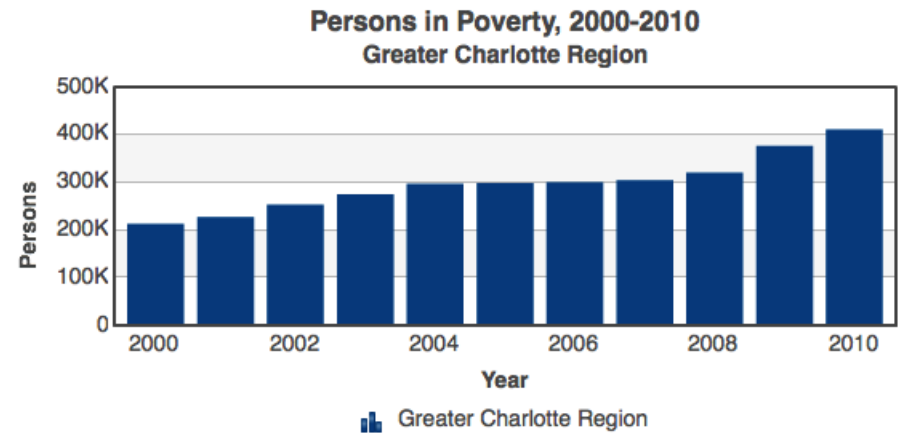
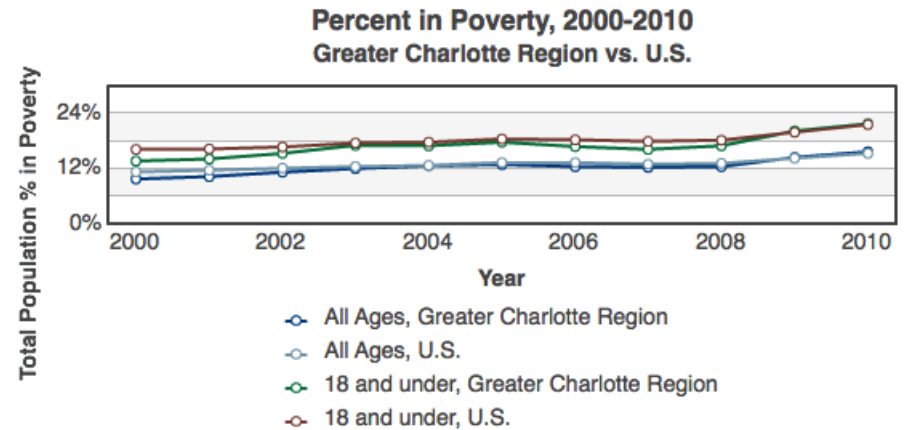
**Median Household Income Growth, 2000-2010
Greater Charlotte Region vs. U.S.**



Poverty

In 2007, before the national recession, a smaller share of the Greater Charlotte Region population (12%) was in poverty than the US population (13%). From 2007 to 2010, the population in poverty in the Greater Charlotte Region grew 35% to a total of 411,000 residents in poverty. This raised the region’s overall poverty levels slightly higher than the US, with 16% in poverty compared to 15% in the US.

Child poverty rates also went up during this period, rising from 16% to 22% in the Greater Charlotte Region. US childhood poverty rates increased from 18% to 22%.



Section 2:

County Snapshots

Introduction

This section contains summary reports on each individual county in the Greater Charlotte Region. Individual county reports consist of four pages: Employment Growth Trend, Industry Composition, Workforce Conditions, and Top 15 Private Sector Industries.

The **Employment Growth** Trend page highlights key employment and workforce statistics in the county. This page also includes summaries and charts covering the past decade of annual employment growth, net new employment, and net new payroll.

The **Industry Composition** page includes summaries and charts covering the past five years of employment by industry, new jobs by industry, and percentage growth by industry.

The **Workforce Conditions** page includes summaries and charts covering the past decade's unemployment rate, total unemployment workforce, and average salary by industry. (Note: Additional workforce analysis will be in future reports.)

The **Top 15 Private Sector Industries** page lists the top 15 industries by 4-digit NAICS (government industry classification code) in six different categories, including Largest Employment, Most New Jobs (Past 5 Years), Forecasted New Jobs (Next 5 Years), Highest Specialization, Fastest % Growth (Past 5 Years), and Forecasted % Growth (Next 5 Years). Data was assembled from industry leader, EMSI (EconomicModeling.com).

Counties are sorted alphabetically, with North Carolina counties first, followed by South Carolina counties.

Future reports will include additional pages on the individual counties. A single, combined county report will be delivered to each of the county economic development agencies in the region. Supporting data spreadsheets will also be provided.

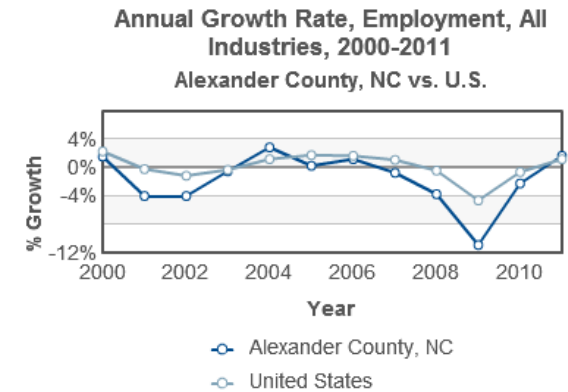
Employment Growth Trend

Key Statistics, 2011: Alexander County, NC

Employment Base:	8,800
Payroll Base:	\$252 M
Job Growth Rate:	1.7%
Payroll Growth Rate:	2.6%
Total Unemployed:	2,040
Unemployment Rate:	11.4%
Average Salary:	\$28,900

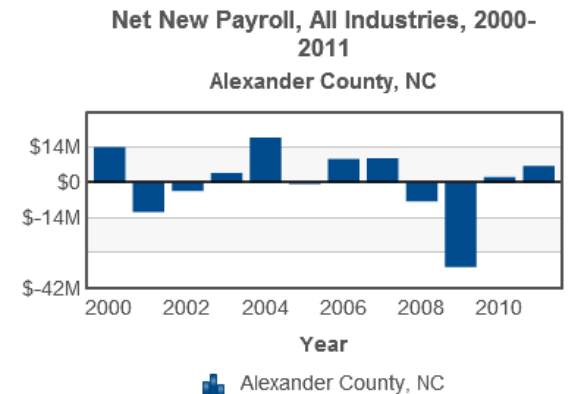
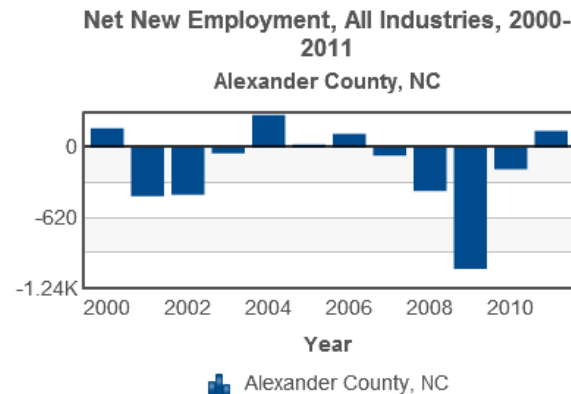
Percentage Growth: Alexander County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 1.7% growth rate in 2011.

ALEXANDER COUNTY, NC



Net New Employment: During the recession, the county lost 1,300 jobs with most losses occurring in 2009. Job creation turned positive in 2011, with 150 created.

Net New Payroll: The county's payroll base declined by \$34 million in 2009 but turned positive in 2010, one year before job growth turned positive. Last year in 2011, the county's payroll grew by \$6.6 million.



Industry Composition

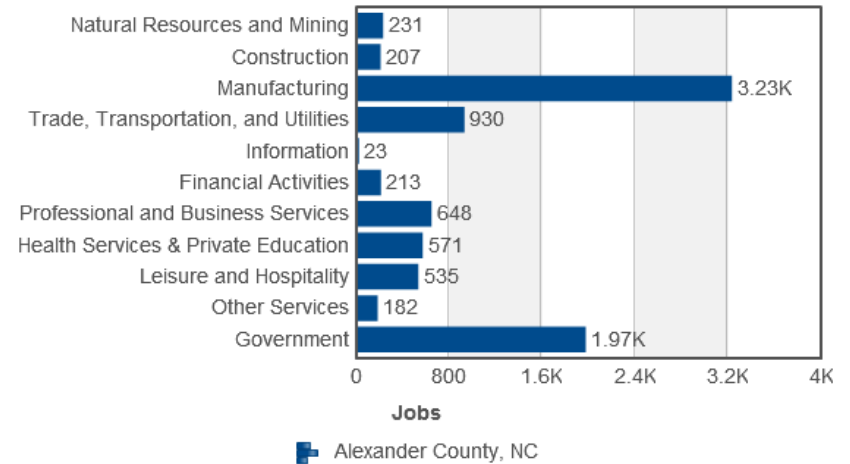
ALEXANDER COUNTY, NC

Top 3 Private Industries: Alexander County's three largest industries are Manufacturing (3,200 jobs), Trade, Transportation and Utilities (930), and Professional and Business Services (650).

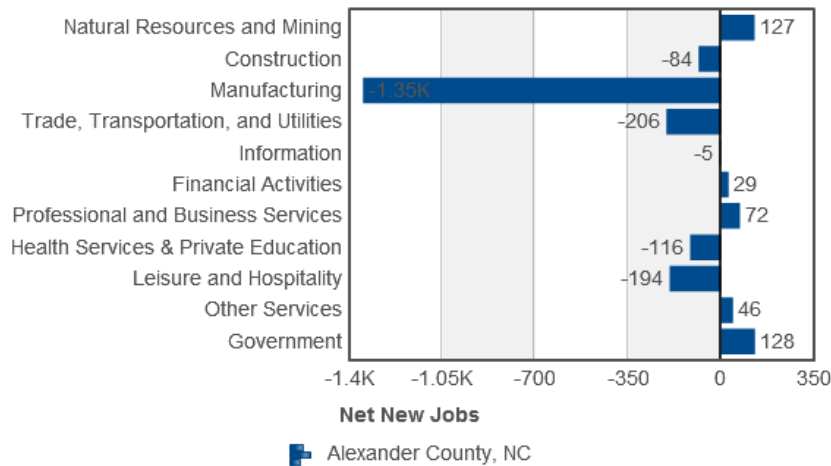
Net New Jobs: Of these industries, only one gained jobs from 2006-2011: Professional Services (72 jobs). Of the other two industries, Manufacturing lost 1,350 jobs while Trade lost 200 jobs.

Percentage Growth: Natural Resources and Mining grew 122% from 2006-2011, more than twenty times US growth in the industry. Other Services experienced 34% growth over the period, while US growth in the industry was 1%. Financial Activities and Professional Services also grew quickly.

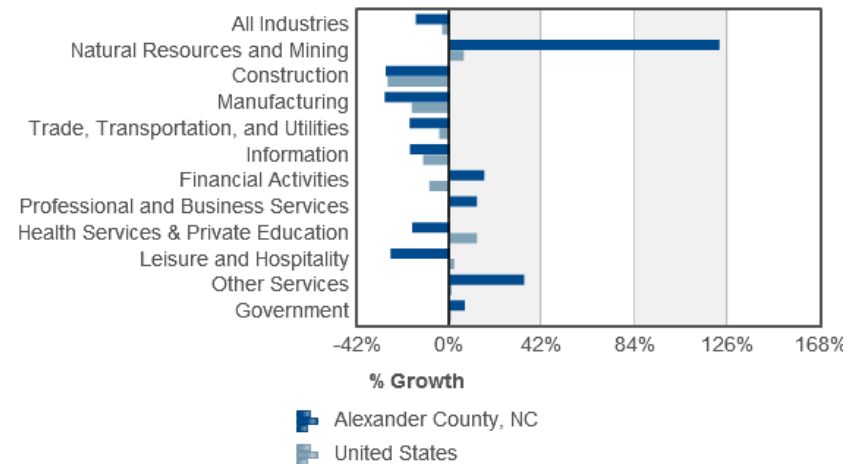
Employment by Industry, 2011
Alexander County, NC



New Jobs, 2006-2011
Alexander County, NC

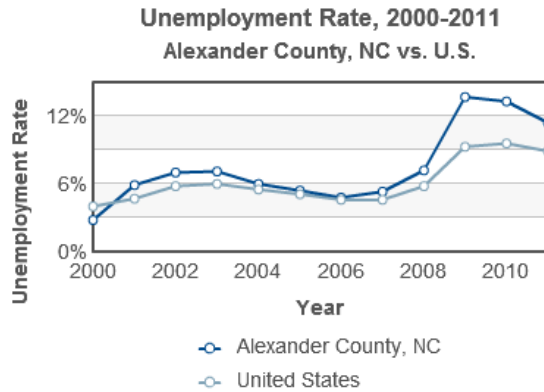


% Growth, Employment, 2006-2011
Alexander County, NC vs. U.S.

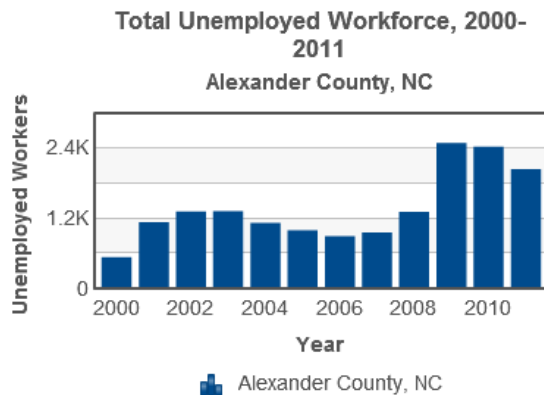


Workforce Conditions

ALEXANDER COUNTY, NC

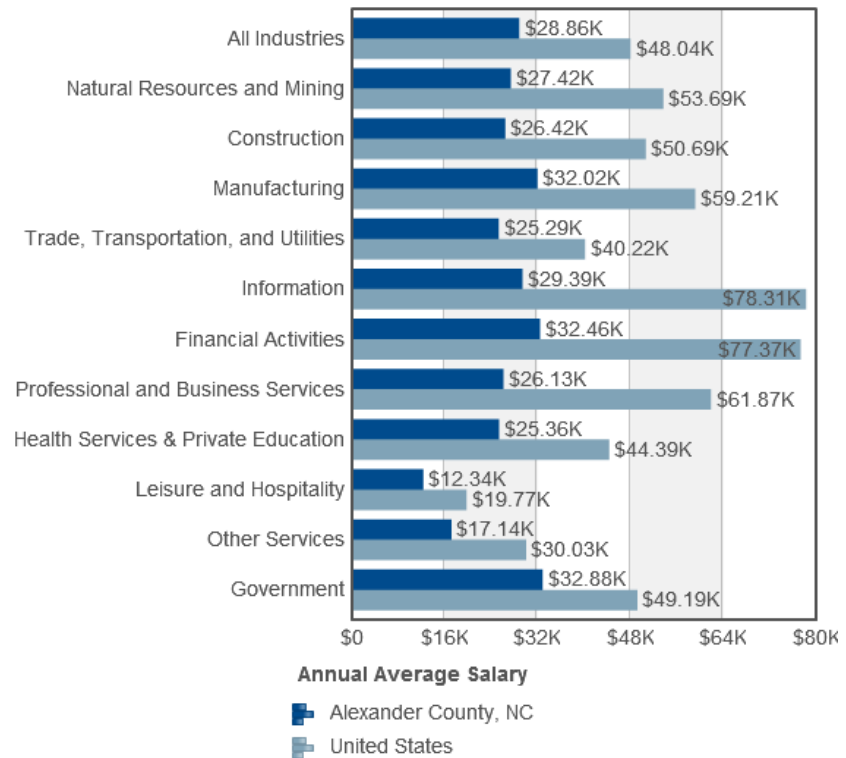


Unemployment: The unemployment rate in Alexander County, now 11.4%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 900 in 2006 to a peak of 2,500 in 2009 and has since declined.



Average Salary by Industry: Alexander County’s average salary reached \$28,900 in 2011. The county’s highest average salary is in Financial Activities, \$32,500. High salaries are also found in Manufacturing (\$32,000) and Information (\$29,400).

Average Salary by Industry, 2011 Alexander County, NC vs. U.S.



From 2010-2011, the three industries with the fastest growing salaries were Natural Resources and Mining (12.0%), Construction (7.6%), and Manufacturing (4.0%).

Top 15 Private Sector Industries by 4-Digit NAICS

ALEXANDER COUNTY, NC

LARGEST EMPLOYMENT			MOST NEW JOBS, Past 5 Years			FORECASTED NEW JOBS, Next 5 Years		
NAICS	Industry	Jobs	NAICS	Description	Net New Jobs 2007-2012	NAICS	Description	Net New Jobs 2012-2017
3371	Household and Institutional ...	1,602	3261	Plastics Product Manufacturing	98	5416	Management, Scientific, and ...	85
7222	Limited-Service Eating Places	295	2122	Metal Ore Mining	87	7222	Limited-Service Eating Places	63
4529	Other General Merchandise St...	286	3149	Other Textile Product Mills	65	3152	Cut and Sew Apparel Manufact...	57
3261	Plastics Product Manufacturing	250	5416	Management, Scientific, and ...	58	3261	Plastics Product Manufacturing	54
5416	Management, Scientific, and ...	212	6111	Elementary and Secondary Sch...	42	3329	Other Fabricated Metal Produ...	49
3132	Fabric Mills	166	3345	Navigational, Measuring, Ele...	35	3116	Animal Slaughtering and Proc...	36
6231	Nursing Care Facilities	163	5222	Nondepository Credit Interme...	29	4529	Other General Merchandise St...	34
7221	Full-Service Restaurants	162	3379	Other Furniture Related Prod...	23	3149	Other Textile Product Mills	26
3222	Converted Paper Product Manu...	143	6117	Educational Support Services...	20	3379	Other Furniture Related Prod...	24
3372	Office Furniture (including ...	128	5412	Accounting, Tax Preparation,...	19	5222	Nondepository Credit Interme...	21
4841	General Freight Trucking	126	1110	Crop Production	19	5617	Services to Buildings and Dw...	20
3329	Other Fabricated Metal Produ...	123	3324	Boiler, Tank, and Shipping C...	14	4841	General Freight Trucking	17
5613	Employment Services	118	8114	Personal and Household Goods...	14	4461	Health and Personal Care Sto...	16
2122	Metal Ore Mining	92	4243	Apparel, Piece Goods, and No...	9	5242	Agencies, Brokerages, and Ot...	16
5221	Depository Credit Intermedia...	87	7222	Limited-Service Eating Places	8	6232	Residential Mental Retardati...	16

HIGHEST SPECIALIZATION (High LQ)			FASTEST % GROWTH, Past 5 Years			FORECASTED % GROWTH, Next 5 Years		
NAICS	Industry	Location Quotient	NAICS	Description	% Growth 2007-2012	NAICS	Description	% Growth 2012-2017
3371	Household and Institutional ...	124.6	2122	Metal Ore Mining	1740%	3116	Animal Slaughtering and Proc...	47%
3132	Fabric Mills	56.3	3149	Other Textile Product Mills	1300%	5222	Nondepository Credit Interme...	42%
2122	Metal Ore Mining	40.2	3345	Navigational, Measuring, Ele...	206%	5416	Management, Scientific, and ...	40%
3372	Office Furniture (including ...	22.3	5222	Nondepository Credit Interme...	138%	3329	Other Fabricated Metal Produ...	40%
3149	Other Textile Product Mills	19.4	3261	Plastics Product Manufacturing	64%	5617	Services to Buildings and Dw...	38%
3222	Converted Paper Product Manu...	8.4	5412	Accounting, Tax Preparation,...	38%	3149	Other Textile Product Mills	37%
3261	Plastics Product Manufacturing	8.2	5416	Management, Scientific, and ...	38%	6232	Residential Mental Retardati...	26%
3329	Other Fabricated Metal Produ...	8.0	3116	Animal Slaughtering and Proc...	12%	3261	Plastics Product Manufacturing	22%
3219	Other Wood Product Manufactu...	6.5	5617	Services to Buildings and Dw...	10%	7222	Limited-Service Eating Places	21%
5416	Management, Scientific, and ...	2.9	4461	Health and Personal Care Sto...	10%	4461	Health and Personal Care Sto...	20%
4529	Other General Merchandise St...	2.9	8111	Automotive Repair and Mainte...	7%	5412	Accounting, Tax Preparation,...	19%
3116	Animal Slaughtering and Proc...	2.5	4471	Gasoline Stations	7%	4841	General Freight Trucking	13%
4841	General Freight Trucking	2.3	3329	Other Fabricated Metal Produ...	5%	4529	Other General Merchandise St...	12%
3345	Navigational, Measuring, Ele...	2.1	7222	Limited-Service Eating Places	3%	4244	Grocery and Related Product ...	12%
6232	Residential Mental Retardati...	1.7	6233	Community Care Facilities fo...	3%	2382	Building Equipment Contractors	11%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com) Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

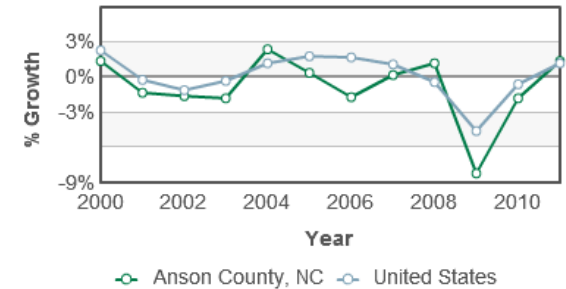
Key Statistics, 2011: Anson County, NC

Employment Base:	7,500
Payroll Base:	\$234 M
Job Growth Rate:	1.4%
Payroll Growth Rate:	2.0%
Total Unemployed:	1,330
Unemployment Rate:	12.2%
Average Salary:	\$31,100

Percentage Growth: Anson County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 1.4% growth rate in 2011.

ANSON COUNTY, NC

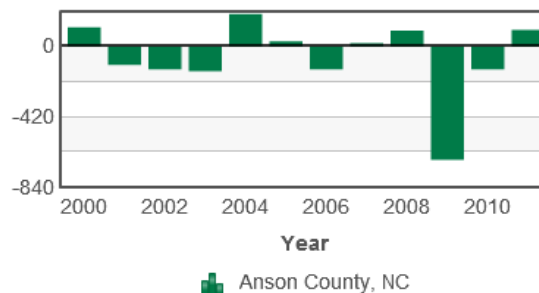
Annual Growth Rate, Employment, All Industries, 2000-2011
Anson County, NC vs. U.S.



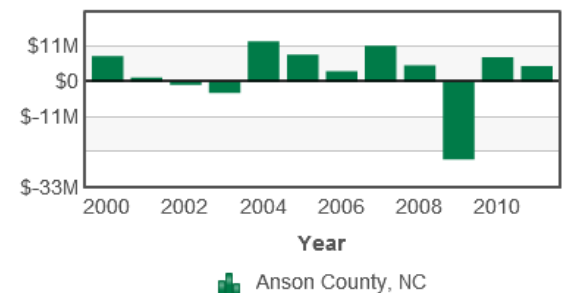
Net New Employment: During the recession, the county lost 800 jobs with nearly all losses occurring in 2009. Job creation turned positive in 2011, with 100 created.

Net New Payroll: The county's payroll base declined by \$24 million in 2009 but turned positive in 2010, one year before job growth turned positive. Last year in 2011, the county's payroll grew by \$5.0 Million.

Net New Employment, All Industries, 2000-2011
Anson County, NC



Net New Payroll, All Industries, 2000-2011
Anson County, NC



Industry Composition

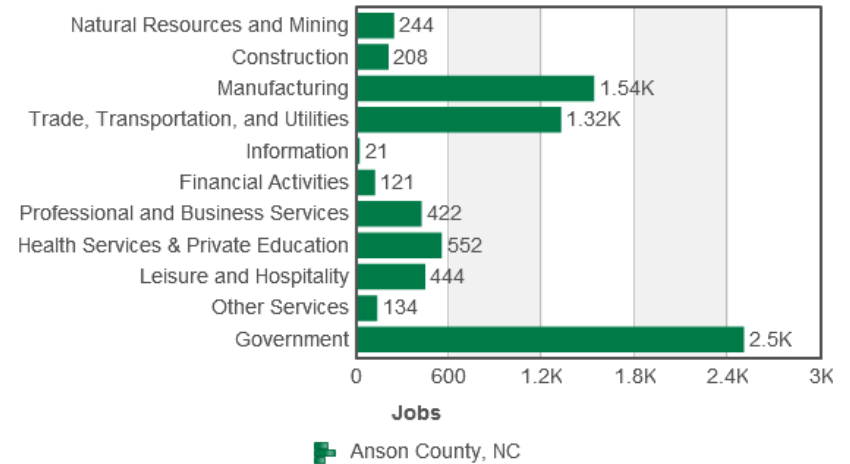
ANSON COUNTY, NC

Top 3 Private Industries: Anson County's three largest industries are Manufacturing (1,500 jobs), Trade, Transportation and Utilities (1,300), and Health Services (552).

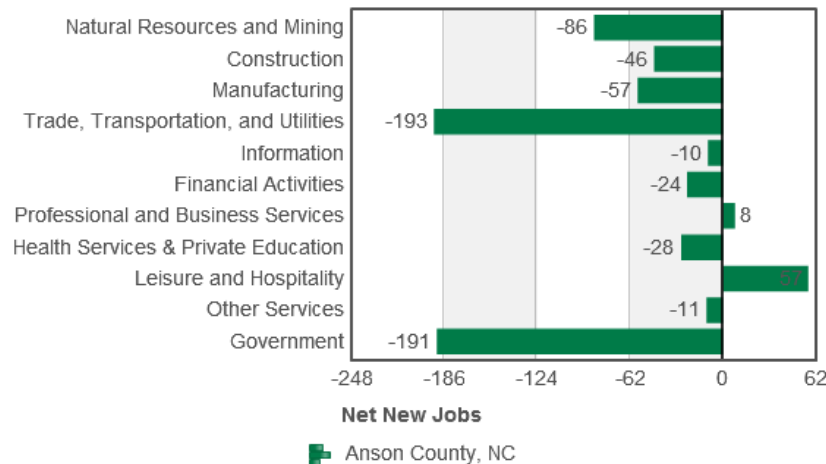
Net New Jobs: These industries lost jobs from 2006-2011: Trade (-193), Government (-191) and Manufacturing (-57). Only two industries created new jobs: Leisure and Hospitality (60) and Professional and Business Services (10).

Percentage Growth: Leisure and Hospitality grew 15% from 2006-2011, more than seven times US growth in the industry. Professional Services was the only other industry with positive growth during that period, with 2% growth.

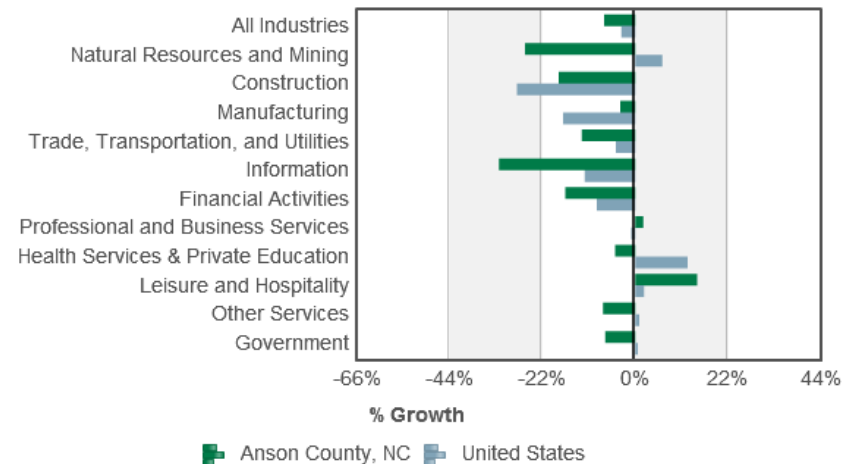
Employment by Industry, 2011
Anson County, NC



New Jobs, 2006-2011
Anson County, NC

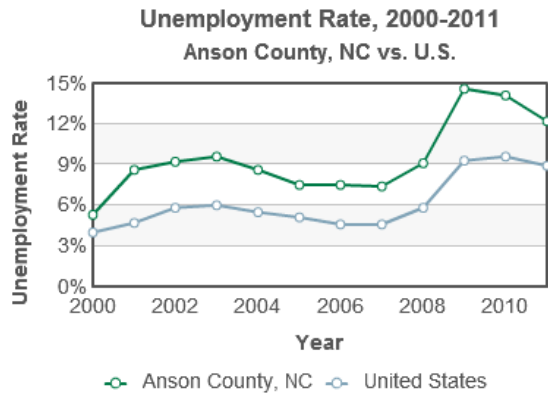


% Growth, Employment, 2006-2011
Anson County, NC vs. U.S.

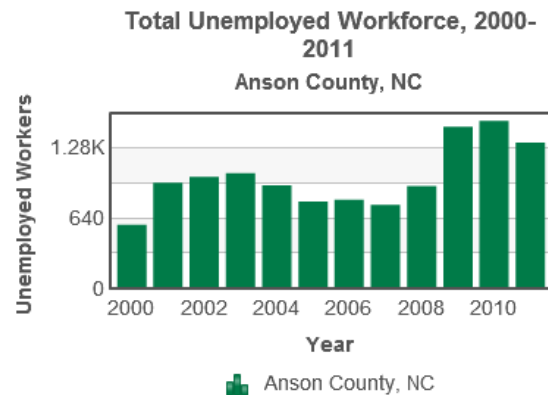


Workforce Conditions

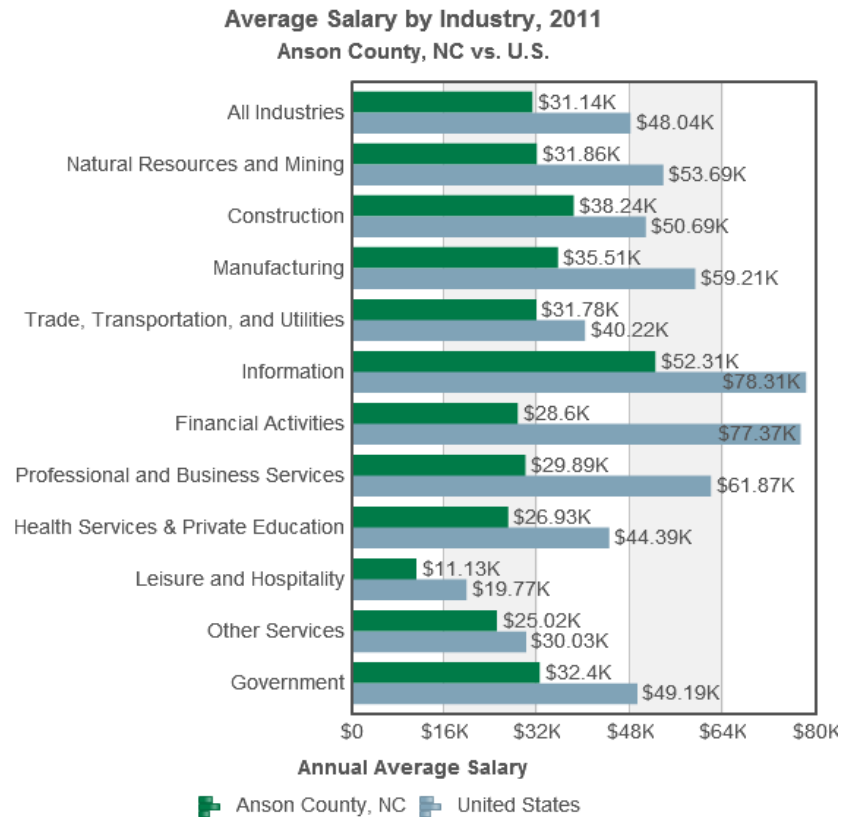
ANSON COUNTY, NC



Unemployment: The unemployment rate in Anson County, now 12.2%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 750 in 2007 to a peak of 1,500 in 2010 and has since declined.



Average Salary by Industry: Anson County’s average salary reached \$31,100 in 2011. The county’s highest average salary is in the Information industry, \$52,300. High salaries are also found in Construction (\$38,200) and Manufacturing (\$35,500).



From 2010-2011, the three industries with the fastest growing salaries were Information (40.9%), Health Services & Private Education (6.5%), and Construction (3.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

ANSON COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
3132	Fabric Mills	312
7222	Limited-Service Eating Places	293
4529	Other General Merchandise St...	269
3322	Cutlery and Handtool Manufac...	210
3323	Architectural and Structural...	177
3116	Animal Slaughtering and Proc...	170
4232	Furniture and Home Furnishin...	153
4451	Grocery Stores	153
6232	Residential Mental Retardati...	136
3353	Electrical Equipment Manufac...	135
5613	Employment Services	128
4841	General Freight Trucking	126
7221	Full-Service Restaurants	114
3252	Resin, Synthetic Rubber, and...	99
6244	Child Day Care Services	98

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
3322	Cutlery and Handtool Manufac...	205
6232	Residential Mental Retardati...	131
6244	Child Day Care Services	93
6233	Community Care Facilities fo...	73
3116	Animal Slaughtering and Proc...	65
5613	Employment Services	59
3353	Electrical Equipment Manufac...	58
4232	Furniture and Home Furnishin...	48
1110	Crop Production	39
3219	Other Wood Product Manufactu...	29
4244	Grocery and Related Product ...	29
5511	Management of Companies and ...	27
7221	Full-Service Restaurants	22
4239	Miscellaneous Durable Goods ...	14
3329	Other Fabricated Metal Produ...	13

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
3322	Cutlery and Handtool Manufac...	122
5613	Employment Services	112
3219	Other Wood Product Manufactu...	96
6232	Residential Mental Retardati...	93
4529	Other General Merchandise St...	57
4244	Grocery and Related Product ...	47
6233	Community Care Facilities fo...	41
3353	Electrical Equipment Manufac...	36
6244	Child Day Care Services	34
3323	Architectural and Structural...	26
2389	Other Specialty Trade Contra...	25
2381	Foundation, Structure, and B...	25
1110	Crop Production	18
5611	Office Administrative Services	18
5616	Investigation and Security S...	18

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3132	Fabric Mills	115.9
3322	Cutlery and Handtool Manufac...	98.0
3271	Clay Product and Refractory ...	37.7
4232	Furniture and Home Furnishin...	29.0
3252	Resin, Synthetic Rubber, and...	20.1
1133	Logging	19.0
3353	Electrical Equipment Manufac...	18.1
3323	Architectural and Structural...	9.6
3219	Other Wood Product Manufactu...	8.4
3116	Animal Slaughtering and Proc...	6.2
8113	Commercial and Industrial Ma...	5.3
3329	Other Fabricated Metal Produ...	4.4
6232	Residential Mental Retardati...	4.0
4529	Other General Merchandise St...	3.0
4841	General Freight Trucking	2.5

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3322	Cutlery and Handtool Manufac...	4100%
6232	Residential Mental Retardati...	2620%
6244	Child Day Care Services	1860%
1110	Crop Production	300%
5511	Management of Companies and ...	93%
5613	Employment Services	86%
3353	Electrical Equipment Manufac...	75%
3116	Animal Slaughtering and Proc...	62%
4244	Grocery and Related Product ...	53%
3219	Other Wood Product Manufactu...	51%
4232	Furniture and Home Furnishin...	46%
3329	Other Fabricated Metal Produ...	27%
2389	Other Specialty Trade Contra...	26%
7221	Full-Service Restaurants	24%
6211	Offices of Physicians	13%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3219	Other Wood Product Manufactu...	112%
5613	Employment Services	88%
6232	Residential Mental Retardati...	68%
3322	Cutlery and Handtool Manufac...	58%
6233	Community Care Facilities fo...	56%
4244	Grocery and Related Product ...	56%
2389	Other Specialty Trade Contra...	46%
6244	Child Day Care Services	35%
1110	Crop Production	35%
8113	Commercial and Industrial Ma...	28%
3353	Electrical Equipment Manufac...	27%
4529	Other General Merchandise St...	21%
4842	Specialized Freight Trucking	16%
3323	Architectural and Structural...	15%
6211	Offices of Physicians	14%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

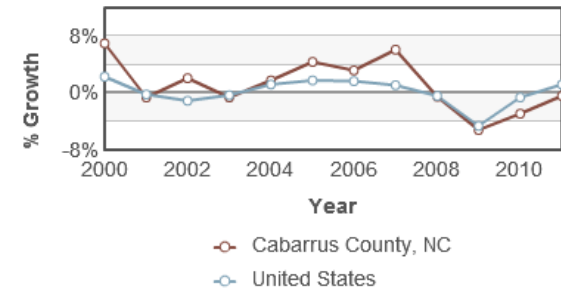
Key Statistics, 2011: Cabarrus County, NC

Employment Base:	61,200
Payroll Base:	\$2.1 B
Job Growth Rate:	-0.4%
Payroll Growth Rate:	-1%
Total Unemployed:	9,060
Unemployment Rate:	10.1%
Average Salary:	\$34,400

Percentage Growth: Cabarrus County has outperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly slower than the US, reaching a -0.4% growth rate in 2011.

CABARRUS COUNTY, NC

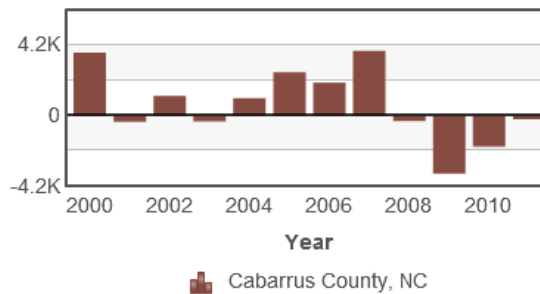
Annual Growth Rate, Employment, All Industries, 2000-2011
Cabarrus County, NC vs. U.S.



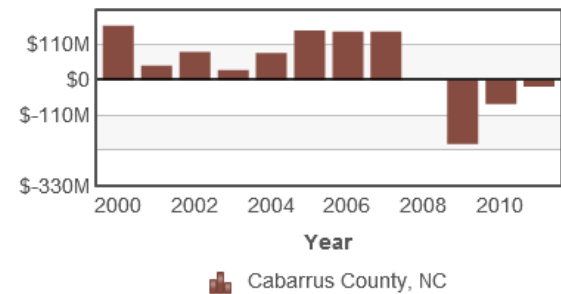
Net New Employment: During the recession, the county lost 53,00 jobs with most losses occurring in 2009. Job creation stayed negative in 2011, with 200 jobs lost.

Net New Payroll: The county's payroll base declined by \$200 million in 2009 and has continued declining since. Last year in 2011, the county payroll declined by \$20.0 million.

Net New Employment, All Industries, 2000-2011
Cabarrus County, NC



Net New Payroll, All Industries, 2000-2011
Cabarrus County, NC



Industry Composition

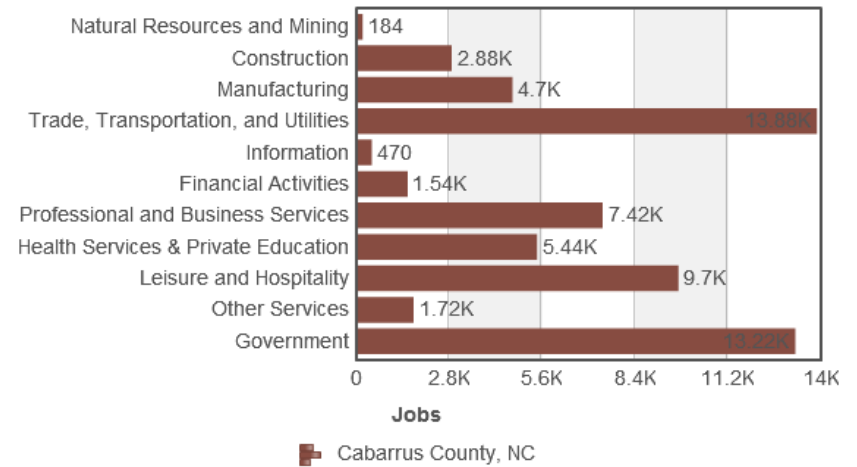
CABARRUS COUNTY, NC

Top 3 Private Industries: Cabarrus County's three largest private industries are Trade, Transportation and Utilities (13,900 jobs), Leisure and Hospitality (9,700) and Professional and Business Services (7,400).

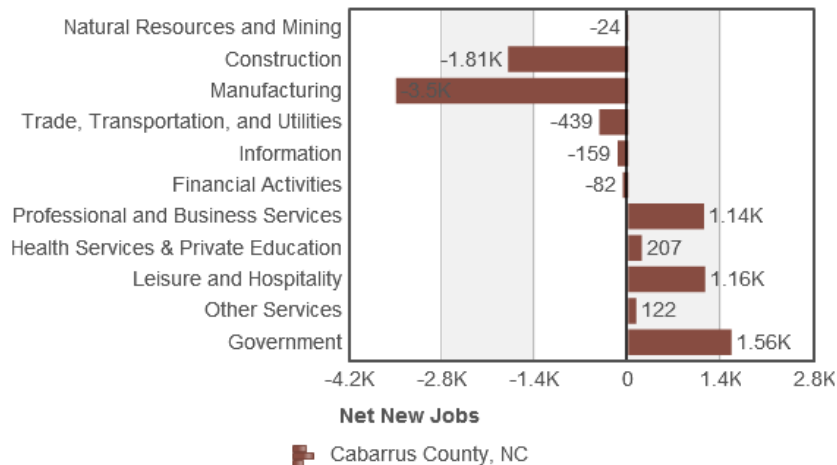
Net New Jobs: Of these industries, only Trade lost jobs (440) from 2006-2011. Leisure (1,160 jobs) and Professional Services (1,140) gained, as did three other industries.

Percentage Growth: Trade declined at 3.1%, a slower rate than the US over the period 2006-2011. Leisure (13.6%) and Professional Services (18.2%) both grew significantly faster than the US.

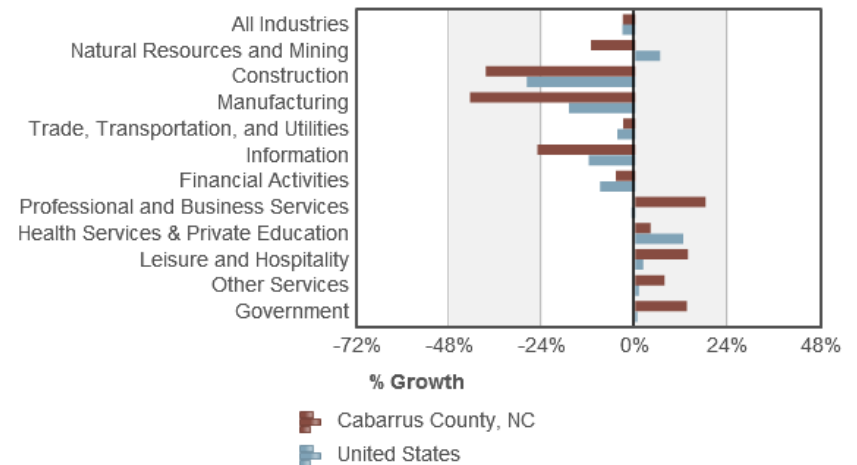
Employment by Industry, 2011
Cabarrus County, NC



New Jobs, 2006-2011
Cabarrus County, NC

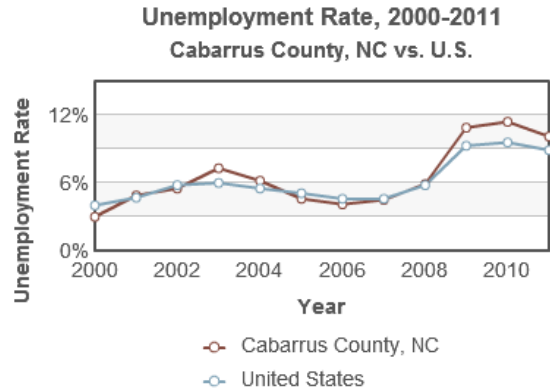


% Growth, Employment, 2006-2011
Cabarrus County, NC vs. U.S.

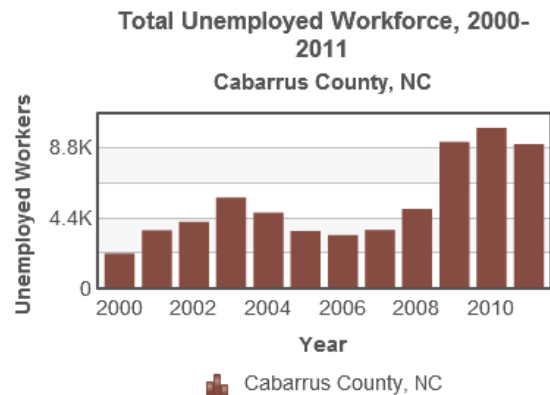


Workforce Conditions

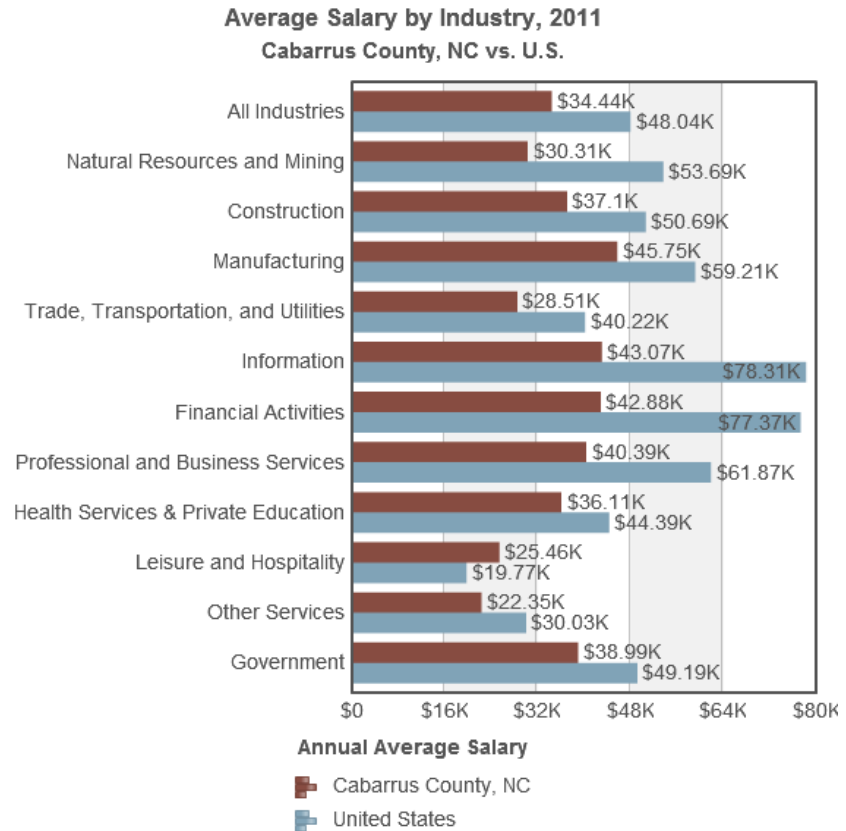
CABARRUS COUNTY, NC



Unemployment: The unemployment rate in Cabarrus County, now 10.1%, has been higher than the US for a majority of the past decade. The number of unemployed workers in the county grew from 3,400 in 2006 to a peak of 10,100 in 2010 and has since declined.



Average Salary by Industry: Cabarrus County’s average salary reached \$34,400 in 2011. The county’s highest average salary is in the Manufacturing industry, \$45,800. High salaries are also found in Information (\$43,100) and Financial Activities (\$42,900).



From 2010-2011, the three industries with the fastest growing salaries were Information (7.6%), Natural Resources and Mining (5.2%), and Financial Activities (4.6%).

Top 15 Private Sector Industries by 4-Digit NAICS

CABARRUS COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7221	Full-Service Restaurants	3,415
7222	Limited-Service Eating Places	3,356
4529	Other General Merchandise St...	2,135
4481	Clothing Stores	1,620
7112	Spectator Sports	1,508
5614	Business Support Services	1,242
5511	Management of Companies and ...	1,128
4451	Grocery Stores	1,097
2382	Building Equipment Contractors	917
5617	Services to Buildings and Dw...	894
5416	Management, Scientific, and ...	866
6231	Nursing Care Facilities	817
5613	Employment Services	789
4411	Automobile Dealers	746
6214	Outpatient Care Centers	710

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
7222	Limited-Service Eating Places	658
5614	Business Support Services	539
7131	Amusement Parks and Arcades	415
4529	Other General Merchandise St...	384
6214	Outpatient Care Centers	227
4931	Warehousing and Storage	215
6241	Individual and Family Services	211
4481	Clothing Stores	166
3272	Glass and Glass Product Manu...	166
5617	Services to Buildings and Dw...	136
5311	Lessors of Real Estate	108
6216	Home Health Care Services	84
7113	Promoters of Performing Arts...	83
4451	Grocery Stores	80
5416	Management, Scientific, and ...	80

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
4529	Other General Merchandise St...	639
5614	Business Support Services	546
7222	Limited-Service Eating Places	406
4481	Clothing Stores	399
5416	Management, Scientific, and ...	329
7112	Spectator Sports	273
6214	Outpatient Care Centers	258
6241	Individual and Family Services	234
7221	Full-Service Restaurants	221
2381	Foundation, Structure, and B...	199
2383	Building Finishing Contractors	188
3363	Motor Vehicle Parts Manufact...	184
5617	Services to Buildings and Dw...	179
4931	Warehousing and Storage	175
6233	Community Care Facilities fo...	160

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3122	Tobacco Manufacturing	65.0
7112	Spectator Sports	25.6
3151	Apparel Knitting Mills	20.6
4889	Other Support Activities for...	9.7
3119	Other Food Manufacturing	7.0
7131	Amusement Parks and Arcades	6.2
3272	Glass and Glass Product Manu...	5.3
3259	Other Chemical Product and P...	4.5
3359	Other Electrical Equipment a...	4.2
3336	Engine, Turbine, and Power T...	3.9
4233	Lumber and Other Constructio...	3.7
4412	Other Motor Vehicle Dealers	3.6
5614	Business Support Services	3.2
4237	Hardware, and Plumbing and H...	3.2
4481	Clothing Stores	3.1

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3272	Glass and Glass Product Manu...	874%
7131	Amusement Parks and Arcades	446%
4931	Warehousing and Storage	422%
7113	Promoters of Performing Arts...	361%
5121	Motion Picture and Video Ind...	79%
5614	Business Support Services	77%
4533	Used Merchandise Stores	68%
6241	Individual and Family Services	65%
3259	Other Chemical Product and P...	53%
6214	Outpatient Care Centers	47%
7224	Drinking Places (Alcoholic B...	47%
3336	Engine, Turbine, and Power T...	46%
5311	Lessors of Real Estate	45%
6216	Home Health Care Services	41%
4234	Professional and Commercial ...	34%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
7113	Promoters of Performing Arts...	67%
4931	Warehousing and Storage	66%
3363	Motor Vehicle Parts Manufact...	55%
5611	Office Administrative Services	44%
5614	Business Support Services	44%
6241	Individual and Family Services	44%
4237	Hardware, and Plumbing and H...	40%
5416	Management, Scientific, and ...	38%
3231	Printing and Related Support...	38%
6214	Outpatient Care Centers	36%
2383	Building Finishing Contractors	35%
5616	Investigation and Security S...	32%
7131	Amusement Parks and Arcades	31%
6212	Offices of Dentists	31%
4529	Other General Merchandise St...	30%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

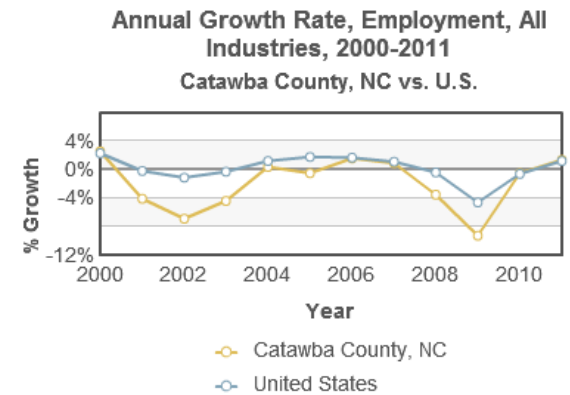
Employment Growth Trend

Key Statistics, 2011: Catawba County, NC

Employment Base:	78,200
Payroll Base:	\$2.8 B
Job Growth Rate:	1.4%
Payroll Growth Rate:	4.2%
Total Unemployed:	9,400
Unemployment Rate:	12.7%
Average Salary:	\$36,400

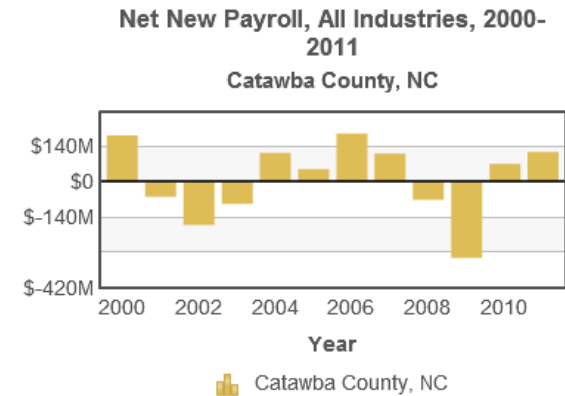
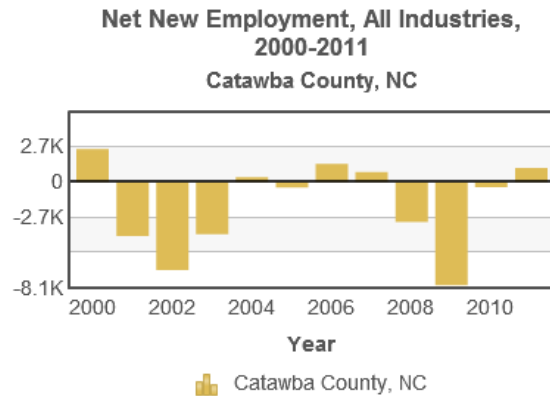
Percentage Growth: Catawba County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 1.4% growth rate in 2011.

CATAWBA COUNTY, NC



Net New Employment: During the recession, the county lost 8,300 jobs with most losses occurring in 2009. Job creation turned positive in 2011, with 1,100 created.

Net New Payroll: The county's payroll base declined by \$302 million in 2009 but turned positive in 2010, one year before job growth turned positive. Last year in 2011, the county's payroll grew by \$120 million.



Industry Composition

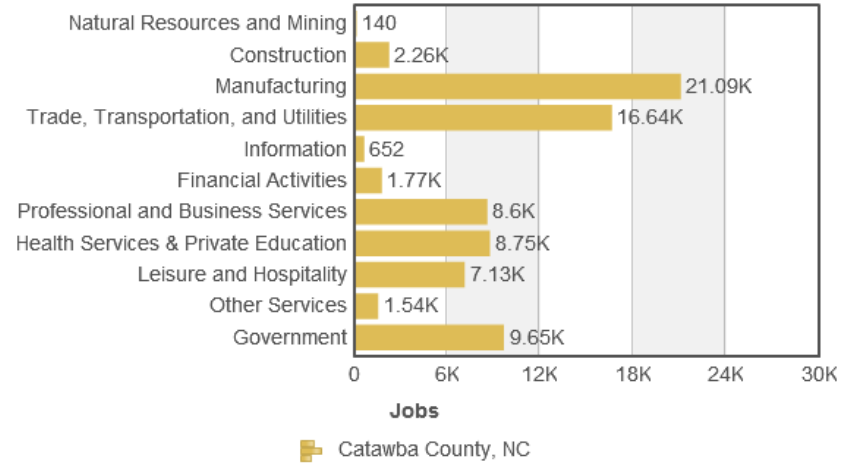
CATAWBA COUNTY, NC

Top 3 Private Industries: Catawba County's three largest industries in 2011 are Manufacturing (21,100 jobs), Trade, Transportation and Utilities (16,600), and Professional Services (8,600).

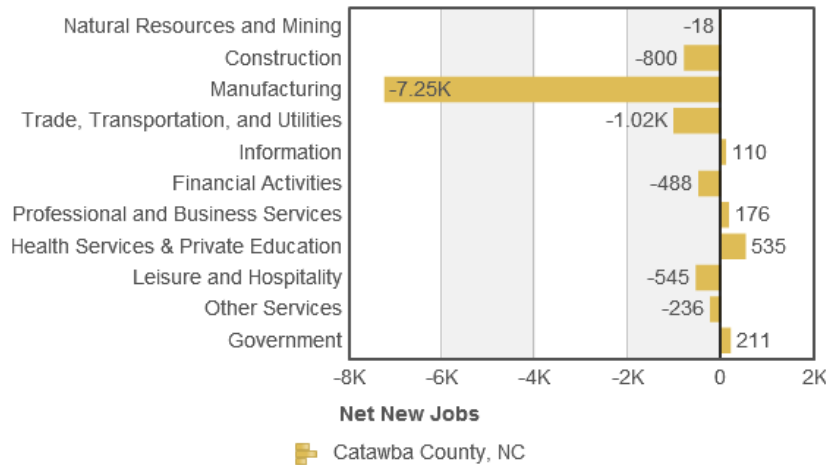
Net New Jobs: Of these industries, only Professional Services gained jobs from 2006-2011 (180). Of the other two industries, Manufacturing lost 7,300 jobs and Trade lost 1,000.

Percentage Growth: Information had 20.3% growth from 2006-2011, while US growth in the industry over that period was -12%. Only two other industries in the county had positive growth over the period, Health Services (6.5%) and Professional Services (2.1%).

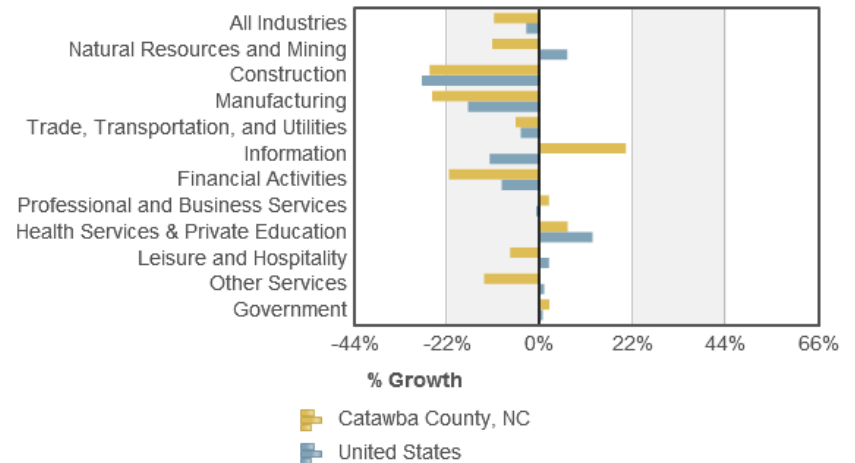
Employment by Industry, 2011
Catawba County, NC



New Jobs, 2006-2011
Catawba County, NC

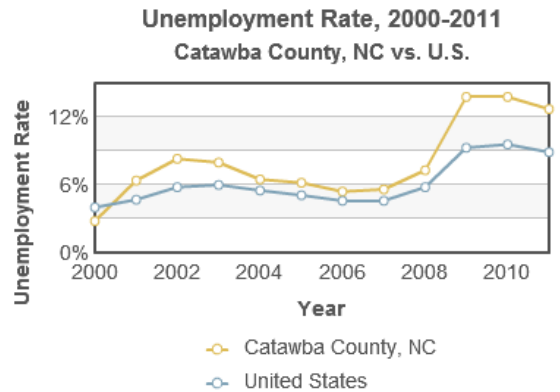


% Growth, Employment, 2006-2011
Catawba County, NC vs. U.S.

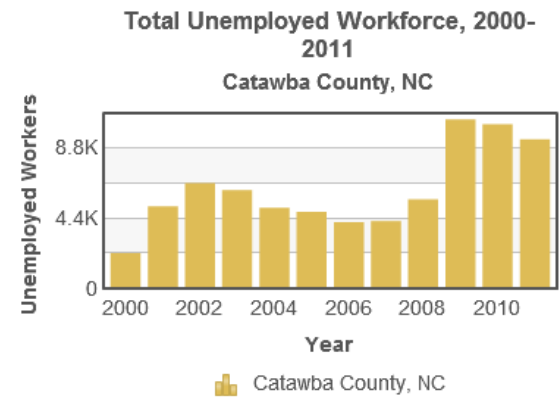


Workforce Conditions

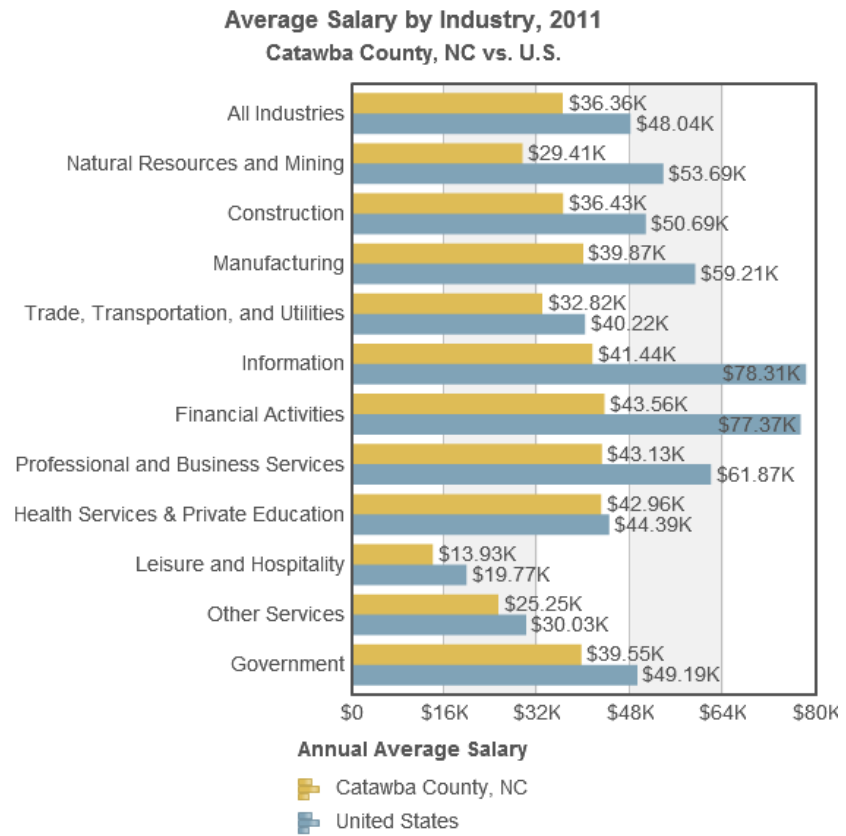
CATAWBA COUNTY, NC



Unemployment: The unemployment rate in Catawba County, now 12.7%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 4,200 in 2006 to a peak of 10,600 in 2009 and has since declined.



Average Salary by Industry: Catawba County's average salary reached \$36,400 in 2011. The county's highest average salary is in Financial Activities, \$43,600. High salaries are also found in Professional Services (\$43,100) and Health Services (\$43,000).



From 2010-2011, the three industries with the fastest growing salaries were Professional Services (7.1%), Manufacturing (4%), and Other Services (3.9%).

Top 15 Private Sector Industries by 4-Digit NAICS

CATAWBA COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
3371	Household and Institutional ...	6,420
7221	Full-Service Restaurants	2,739
7222	Limited-Service Eating Places	2,616
5613	Employment Services	2,267
3359	Other Electrical Equipment a...	2,043
4841	General Freight Trucking	1,998
5511	Management of Companies and ...	1,970
6211	Offices of Physicians	1,951
3222	Converted Paper Product Manu...	1,618
6221	General Medical and Surgical...	1,509
4529	Other General Merchandise St...	1,390
3261	Plastics Product Manufacturing	1,262
4451	Grocery Stores	1,098
4411	Automobile Dealers	998
5614	Business Support Services	841

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
5614	Business Support Services	755
4931	Warehousing and Storage	604
3312	Steel Product Manufacturing ...	279
4243	Apparel, Piece Goods, and No...	255
4234	Professional and Commercial ...	210
6214	Outpatient Care Centers	209
5511	Management of Companies and ...	190
6241	Individual and Family Services	179
7223	Special Food Services	160
6211	Offices of Physicians	148
6233	Community Care Facilities fo...	148
5416	Management, Scientific, and ...	131
5611	Office Administrative Services	114
3118	Bakeries and Tortilla Manufa...	106
6113	Colleges, Universities, and ...	96

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
6241	Individual and Family Services	426
5614	Business Support Services	399
7222	Limited-Service Eating Places	365
6211	Offices of Physicians	360
3132	Fabric Mills	295
4841	General Freight Trucking	295
7221	Full-Service Restaurants	253
3312	Steel Product Manufacturing ...	248
3363	Motor Vehicle Parts Manufact...	205
5511	Management of Companies and ...	191
4529	Other General Merchandise St...	179
2382	Building Equipment Contractors	166
5416	Management, Scientific, and ...	144
5613	Employment Services	144
4931	Warehousing and Storage	123

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3371	Household and Institutional ...	54.9
3359	Other Electrical Equipment a...	30.5
3151	Apparel Knitting Mills	22.5
3325	Hardware Manufacturing	20.9
3132	Fabric Mills	19.2
3312	Steel Product Manufacturing ...	16.4
3131	Fiber, Yarn, and Thread Mills	14.5
3133	Textile and Fabric Finishing...	13.4
3372	Office Furniture (including ...	11.2
3112	Grain and Oilseed Milling	10.5
3222	Converted Paper Product Manu...	10.5
4542	Vending Machine Operators	6.6
3322	Cutlery and Handtool Manufac...	6.3
3342	Communications Equipment Man...	6.1
3279	Other Nonmetallic Mineral Pr...	4.7

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
5614	Business Support Services	878%
4931	Warehousing and Storage	719%
4243	Apparel, Piece Goods, and No...	319%
5611	Office Administrative Services	248%
6214	Outpatient Care Centers	201%
4234	Professional and Commercial ...	174%
7223	Special Food Services	168%
3312	Steel Product Manufacturing ...	117%
6116	Other Schools and Instructio...	111%
3339	Other General Purpose Machin...	74%
5415	Computer Systems Design and ...	64%
3118	Bakeries and Tortilla Manufa...	58%
6111	Elementary and Secondary Sch...	54%
5416	Management, Scientific, and ...	52%
5311	Lessors of Real Estate	39%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
4422	Home Furnishings Stores	68%
3132	Fabric Mills	57%
6241	Individual and Family Services	51%
3312	Steel Product Manufacturing ...	48%
5614	Business Support Services	47%
4884	Support Activities for Road ...	46%
2361	Residential Building Constru...	46%
3273	Cement and Concrete Product ...	42%
5416	Management, Scientific, and ...	38%
5611	Office Administrative Services	37%
6214	Outpatient Care Centers	27%
5242	Agencies, Brokerages, and Ot...	27%
3363	Motor Vehicle Parts Manufact...	26%
5415	Computer Systems Design and ...	25%
4243	Apparel, Piece Goods, and No...	21%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 150 jobs.

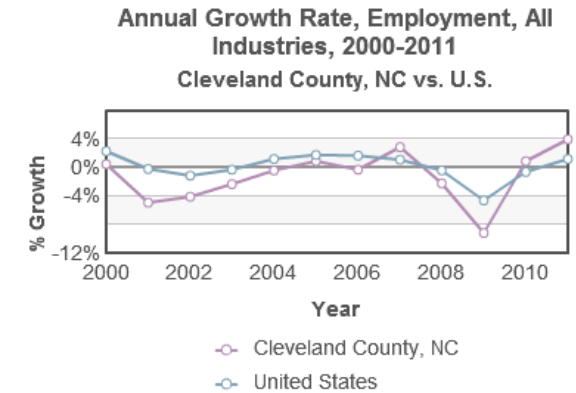
Employment Growth Trend

Key Statistics, 2011: Cleveland County, NC

Employment Base:	31,900
Payroll Base:	\$1.1 B
Job Growth Rate:	4.0%
Payroll Growth Rate:	4.9%
Total Unemployed:	5,900
Unemployment Rate:	11.8%
Average Salary:	\$33,400

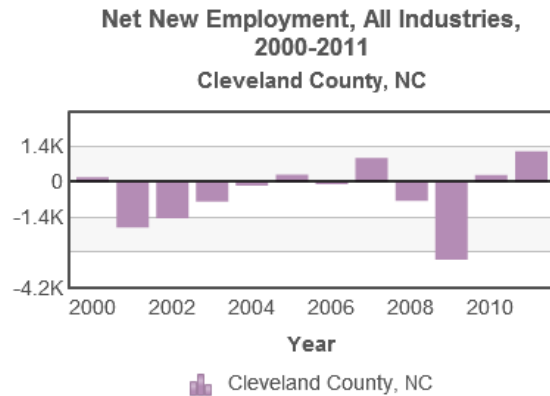
Percentage Growth: Cleveland County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 4.0% growth rate in 2011.

CLEVELAND COUNTY, NC



Net New Employment: During the recession, the county lost 2,800 jobs with all losses occurring in 2009. Job creation turned positive in 2010, and 1,200 were created in 2011.

Net New Payroll: The county's payroll base declined by \$106 million in 2009 but turned positive in 2010. Last year in 2011, the county's payroll grew by \$52.8 million.



Industry Composition

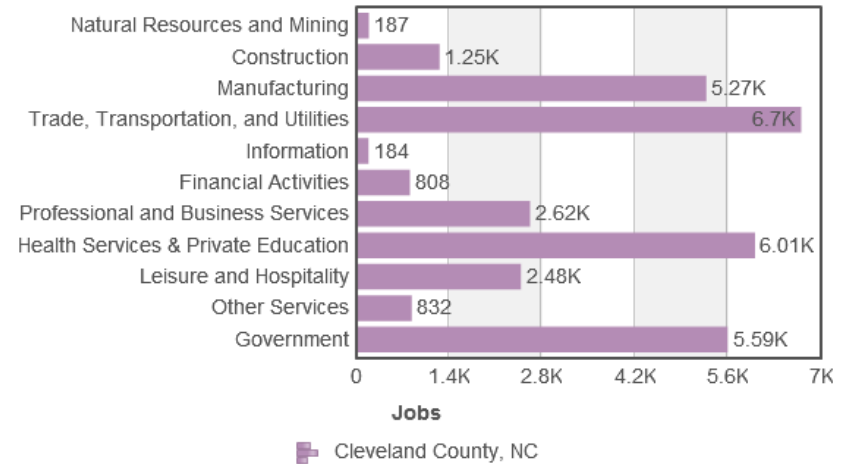
CLEVELAND COUNTY, NC

Top 3 Private Industries: Cleveland County's three largest industries are Trade, Transportation and Utilities (6,700 jobs), Health Services & Private Education (6,000), and Manufacturing (5,300).

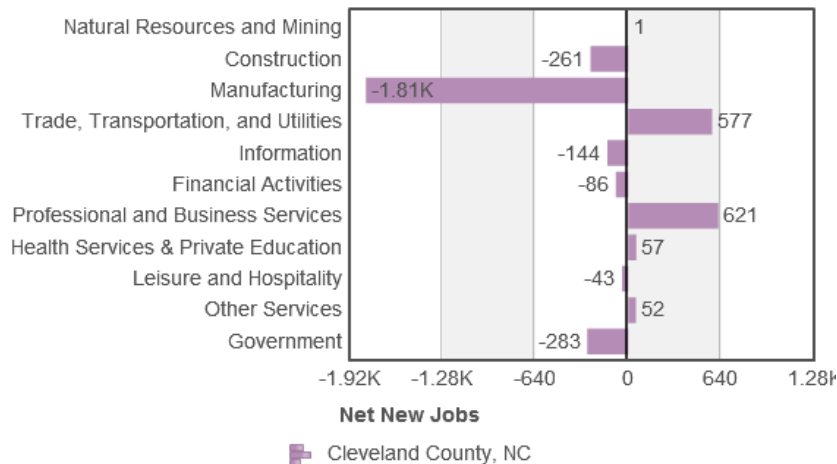
Net New Jobs: Of these industries, only Manufacturing lost jobs (1,800) from 2006-2011. Of the other two industries, Trade gained 600 jobs and Health Services gained 60.

Percentage Growth: Professional Services grew at 31.1% from 2006-2011, while US growth in the industry was -1%. Trade, Transportation and Utilities (9.4%) and Other Services (6.7%) also experienced growth over the period.

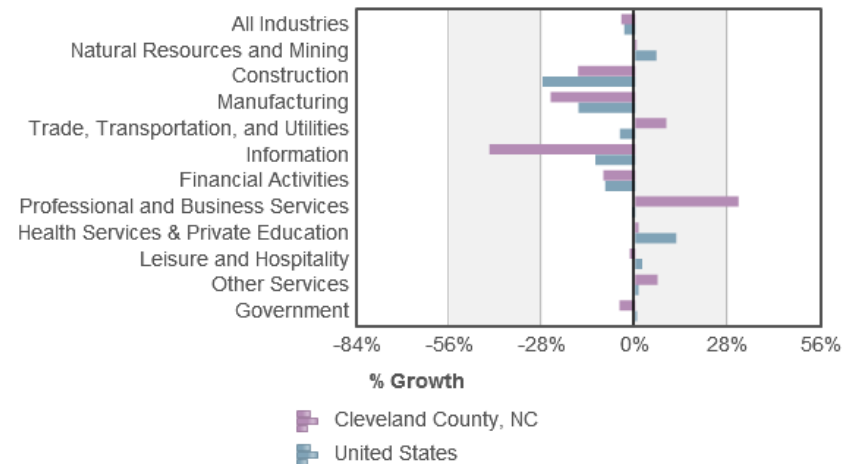
Employment by Industry, 2011
Cleveland County, NC



New Jobs, 2006-2011
Cleveland County, NC

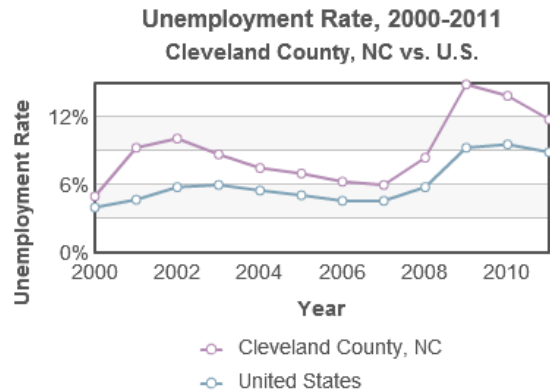


% Growth, Employment, 2006-2011
Cleveland County, NC vs. U.S.

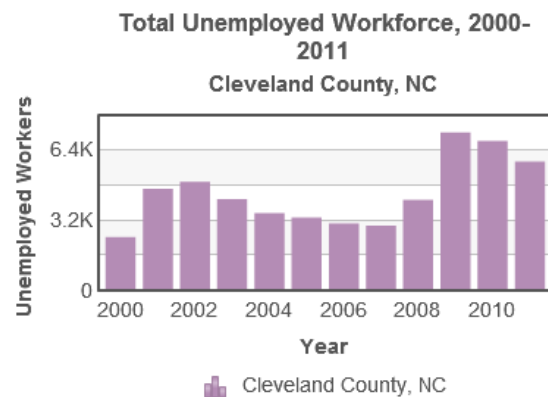


Workforce Conditions

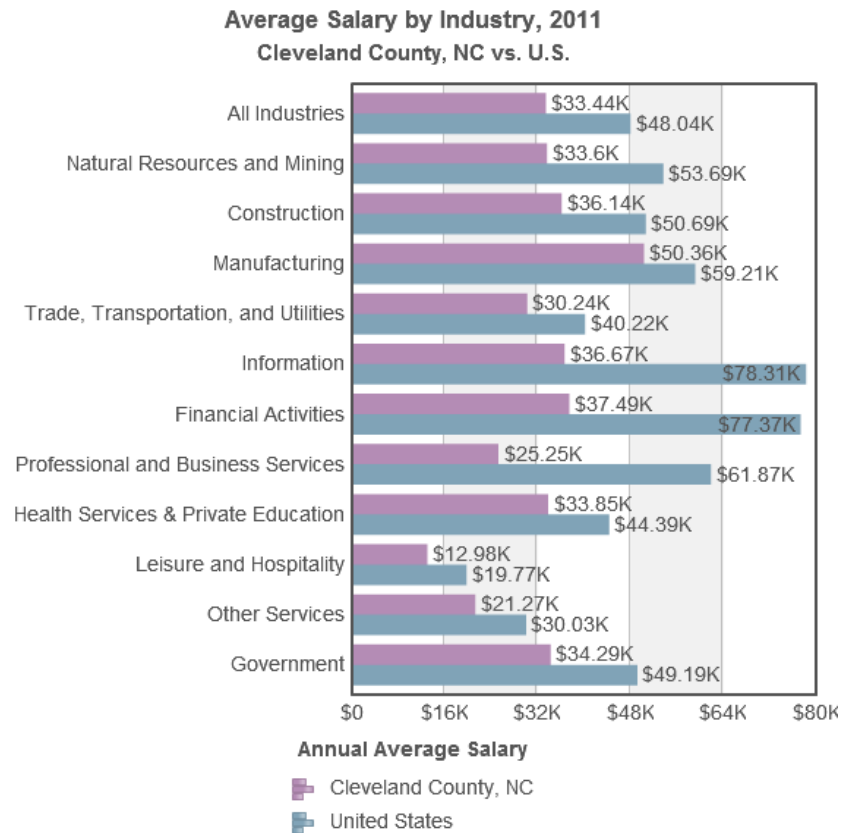
CLEVELAND COUNTY, NC



Unemployment: The unemployment rate in Cleveland County, now 11.8%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 3,000 in 2007 to a peak of 7,200 in 2009 and has since declined.



Average Salary by Industry: Cleveland County's average salary reached \$33,400 in 2011. The county's highest average salary is in Manufacturing, \$50,400. High salaries are also found in Financial Activities (\$37,500) and Information (\$36,700).



From 2010-2011, the three industries with the fastest growing salaries were Construction (9.5%), Other Services (7.1%), and Manufacturing (6.6%).

Top 15 Private Sector Industries by 4-Digit NAICS

CLEVELAND COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
6221	General Medical and Surgical...	1,789
4931	Warehousing and Storage	1,411
7222	Limited-Service Eating Places	1,249
7221	Full-Service Restaurants	934
4529	Other General Merchandise St...	844
6113	Colleges, Universities, and ...	760
4451	Grocery Stores	746
5613	Employment Services	730
6231	Nursing Care Facilities	691
6211	Offices of Physicians	563
3363	Motor Vehicle Parts Manufact...	519
6216	Home Health Care Services	439
4461	Health and Personal Care Sto...	408
5617	Services to Buildings and Dw...	385
5221	Depository Credit Intermedia...	377

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
4931	Warehousing and Storage	754
4451	Grocery Stores	179
6232	Residential Mental Retardati...	171
3344	Semiconductor and Other Elec...	144
6233	Community Care Facilities fo...	140
6113	Colleges, Universities, and ...	110
6221	General Medical and Surgical...	104
4232	Furniture and Home Furnishin...	73
4541	Electronic Shopping and Mail...	58
5511	Management of Companies and ...	55
3323	Architectural and Structural...	49
6219	Other Ambulatory Health Care...	45
4441	Building Material and Suppli...	43
4539	Other Miscellaneous Store Re...	43
3345	Navigational, Measuring, Ele...	42

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
4931	Warehousing and Storage	448
3363	Motor Vehicle Parts Manufact...	235
6221	General Medical and Surgical...	197
6211	Offices of Physicians	126
3371	Household and Institutional ...	117
6231	Nursing Care Facilities	100
4461	Health and Personal Care Sto...	92
2381	Foundation, Structure, and B...	91
4529	Other General Merchandise St...	78
6233	Community Care Facilities fo...	75
4441	Building Material and Suppli...	74
6113	Colleges, Universities, and ...	71
5416	Management, Scientific, and ...	71
3261	Plastics Product Manufacturing	64
4232	Furniture and Home Furnishin...	62

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3131	Fiber, Yarn, and Thread Mills	30.4
3272	Glass and Glass Product Manu...	20.1
3149	Other Textile Product Mills	19.2
3132	Fabric Mills	15.9
3353	Electrical Equipment Manufac...	12.2
3314	Nonferrous Metal (except Alu...	11.0
4931	Warehousing and Storage	9.3
3259	Other Chemical Product and P...	9.2
3339	Other General Purpose Machin...	6.5
6242	Community Food and Housing, ...	6.4
3362	Motor Vehicle Body and Trail...	6.3
4232	Furniture and Home Furnishin...	6.3
3363	Motor Vehicle Parts Manufact...	5.5
3252	Resin, Synthetic Rubber, and...	5.4
3334	Ventilation, Heating, Air-Co...	3.8

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3344	Semiconductor and Other Elec...	2880%
6232	Residential Mental Retardati...	438%
4232	Furniture and Home Furnishin...	116%
4931	Warehousing and Storage	115%
6233	Community Care Facilities fo...	85%
3323	Architectural and Structural...	73%
4539	Other Miscellaneous Store Re...	61%
4451	Grocery Stores	32%
6242	Community Food and Housing, ...	21%
5416	Management, Scientific, and ...	20%
4921	Couriers and Express Deliver...	19%
4441	Building Material and Suppli...	17%
6113	Colleges, Universities, and ...	17%
6212	Offices of Dentists	14%
3259	Other Chemical Product and P...	11%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3371	Household and Institutional ...	111%
3323	Architectural and Structural...	51%
4232	Furniture and Home Furnishin...	46%
3363	Motor Vehicle Parts Manufact...	45%
2381	Foundation, Structure, and B...	39%
5416	Management, Scientific, and ...	38%
4931	Warehousing and Storage	32%
4234	Professional and Commercial ...	28%
6232	Residential Mental Retardati...	28%
4441	Building Material and Suppli...	26%
6233	Community Care Facilities fo...	25%
4921	Couriers and Express Deliver...	24%
6212	Offices of Dentists	23%
2361	Residential Building Constru...	23%
4461	Health and Personal Care Sto...	23%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

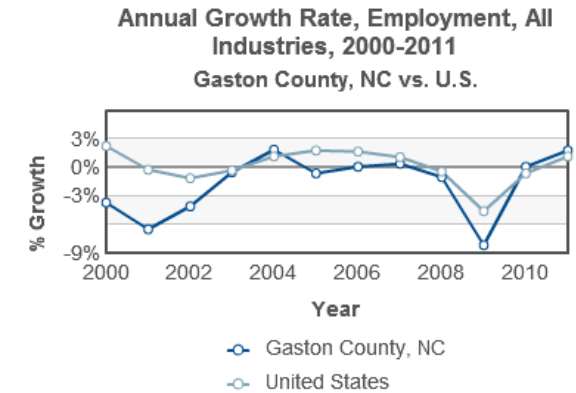
Employment Growth Trend

Key Statistics, 2011: Gaston County, NC

Employment Base:	64,800
Payroll Base:	\$2.3 B
Job Growth Rate:	1.8%
Payroll Growth Rate:	4.0%
Total Unemployed:	11,500
Unemployment Rate:	11.6%
Average Salary:	\$35,300

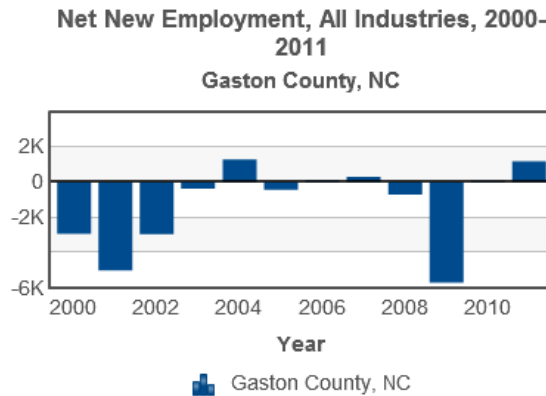
Percentage Growth: Gaston County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 1.8% growth rate in 2011.

GASTON COUNTY, NC



Net New Employment: During the recession, the county lost 5,600 jobs with all losses occurring in 2009. Job creation turned positive in 2010, with 1,200 created in 2011.

Net New Payroll: The county's payroll base declined by \$203 million in 2009 but turned positive in 2010, the same year as job growth turned positive. Last year in 2011, the county's payroll grew by \$89.4 million.



Industry Composition

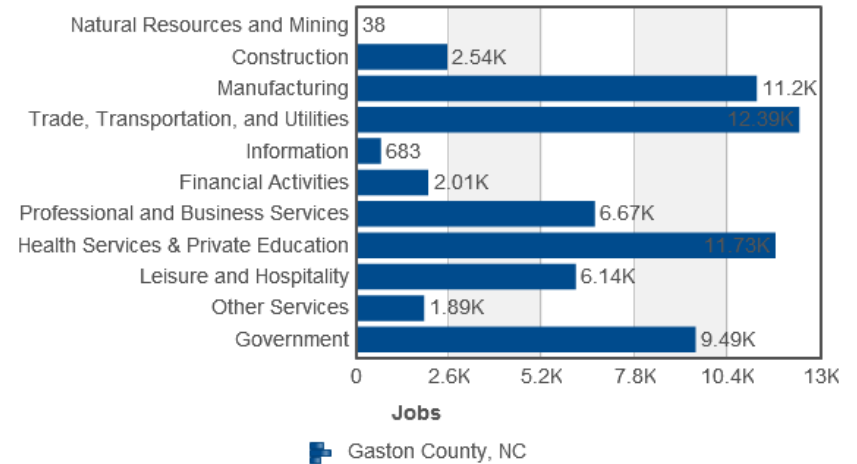
GASTON COUNTY, NC

Top 3 Private Industries: Gaston County's three largest industries are Trade, Transportation and Utilities (12,400 jobs), Health Services (11,800) and Manufacturing (11,200).

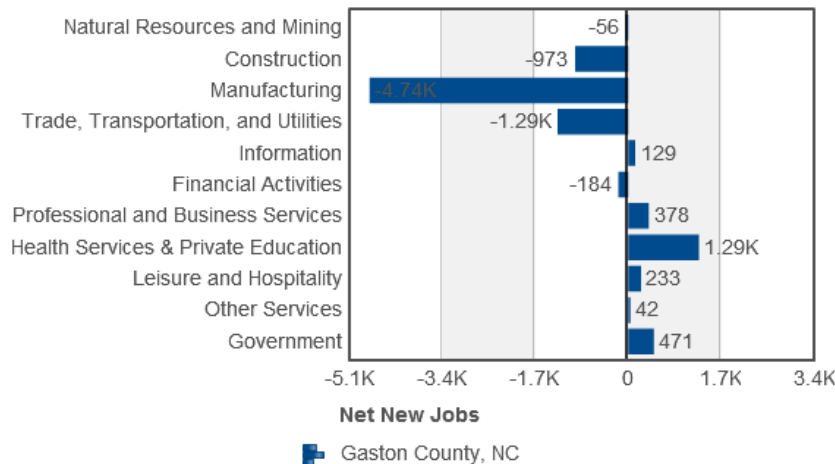
Net New Jobs: Two of these industries lost jobs over the period 2006-2011: Manufacturing (-4,700), and Trade, Transportation and Utilities (-1,300), while Health Services gained 1,300. Only three other industries lost jobs: Construction (-1000), Financial Activities (-180) and Natural Resources and Mining (-60).

Percentage Growth: Over the period 2006-2011, Information grew 23.3% while US growth in the industry was -12%. The second largest growth industry was Health Services, which grew at the same 12.4% rate as the US.

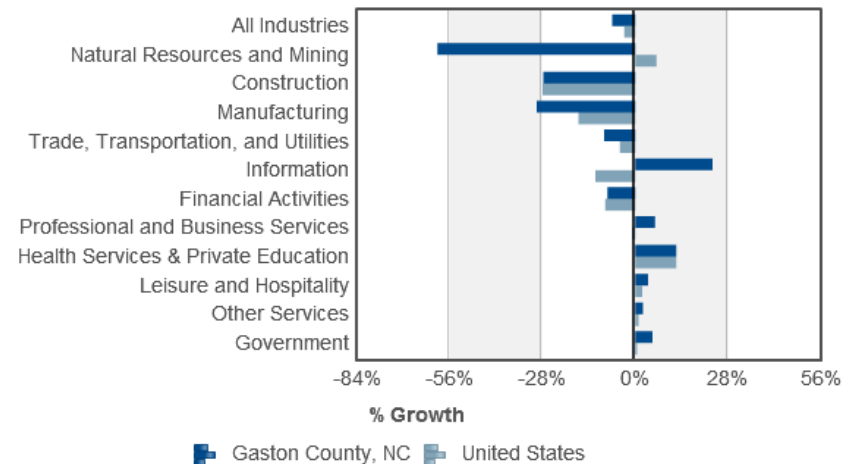
Employment by Industry, 2011
Gaston County, NC



New Jobs, 2006-2011
Gaston County, NC

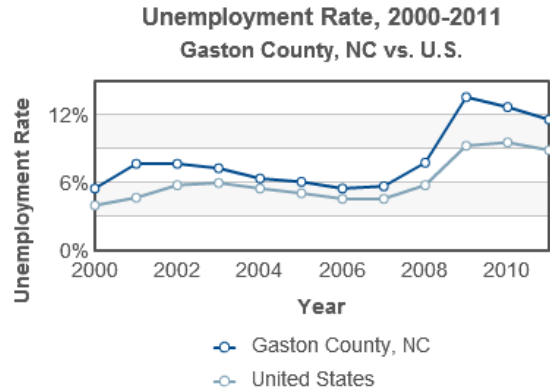


% Growth, Employment, 2006-2011
Gaston County, NC vs. U.S.

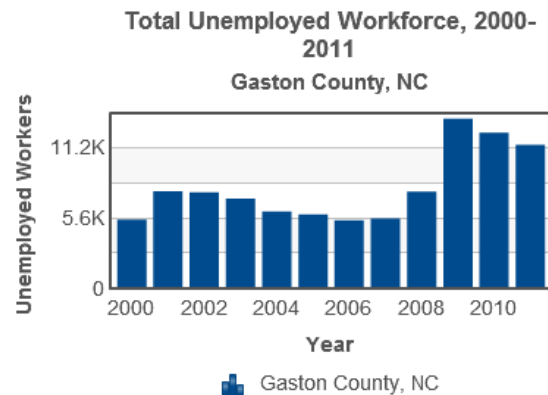


Workforce Conditions

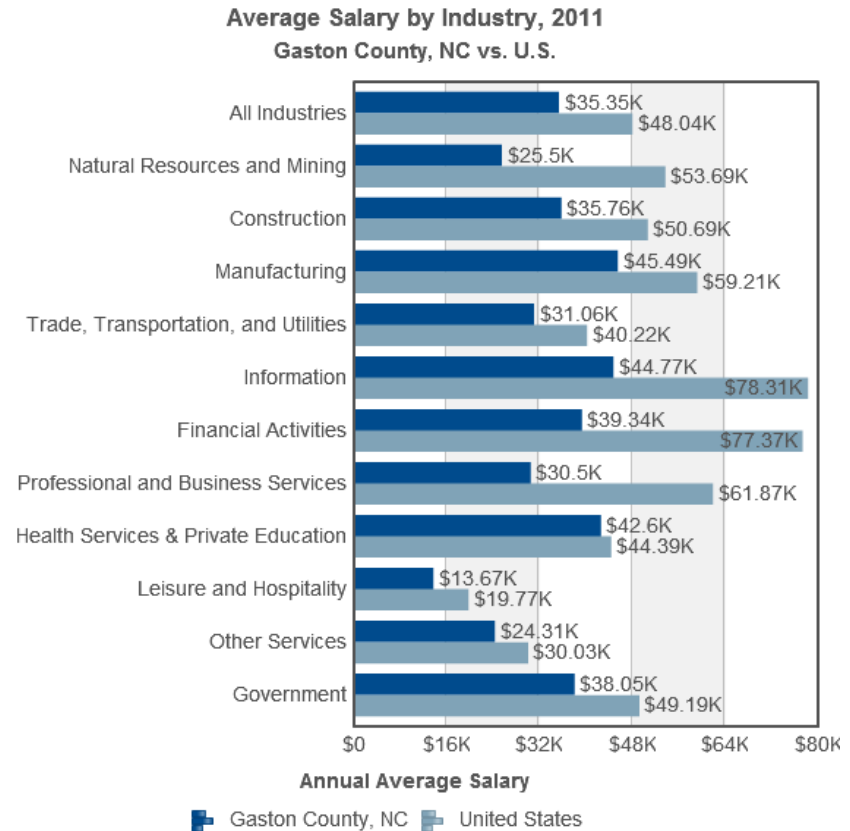
GASTON COUNTY, NC



Unemployment: The unemployment rate in Gaston County, now 11.6%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 5,400 in 2006 to a peak of 13,600 in 2009 and has since declined.



Average Salary by Industry: Gaston County's average salary reached \$35,300 in 2011. The county's highest average salary is in Manufacturing, \$45,500. High salaries are also found in Information (\$44,800) and Health Services (\$42,600).



From 2010-2011, the three industries with the fastest growing salaries were Other Services (10.4%), Manufacturing (5.4%), and Professional and Business Services (2.9%).

Top 15 Private Sector Industries by 4-Digit NAICS

GASTON COUNTY, NC

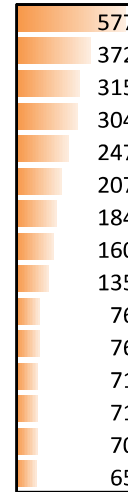
LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7222	Limited-Service Eating Places	3,217
6221	General Medical and Surgical...	2,631
5613	Employment Services	2,556
7221	Full-Service Restaurants	2,316
3363	Motor Vehicle Parts Manufact...	2,306
6211	Offices of Physicians	2,139
4529	Other General Merchandise St...	1,958
5617	Services to Buildings and Dw...	1,365
3131	Fiber, Yarn, and Thread Mills	1,352
4451	Grocery Stores	1,307
6231	Nursing Care Facilities	1,050
6233	Community Care Facilities fo...	916
2382	Building Equipment Contractors	913
3327	Machine Shops; Turned Produc...	806
6241	Individual and Family Services	800

MOST NEW JOBS, Past 5 Years

NAICS	Description
5613	Employment Services
4529	Other General Merchandise St...
6111	Elementary and Secondary Sch...
7222	Limited-Service Eating Places
5617	Services to Buildings and Dw...
7224	Drinking Places (Alcoholic B...
5416	Management, Scientific, and ...
6214	Outpatient Care Centers
6211	Offices of Physicians
4511	Sporting Goods, Hobby, and M...
8131	Religious Organizations
6216	Home Health Care Services
3251	Basic Chemical Manufacturing
6233	Community Care Facilities fo...
6212	Offices of Dentists

Net New Jobs
2007-2012



FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
6211	Offices of Physicians	535
4529	Other General Merchandise St...	523
6221	General Medical and Surgical...	315
3132	Fabric Mills	306
6241	Individual and Family Services	273
7222	Limited-Service Eating Places	256
5416	Management, Scientific, and ...	245
5617	Services to Buildings and Dw...	214
6231	Nursing Care Facilities	197
5613	Employment Services	185
2389	Other Specialty Trade Contra...	182
6213	Offices of Other Health Prac...	159
4413	Automotive Parts, Accessorie...	148
6212	Offices of Dentists	136
6232	Residential Mental Retardati...	125

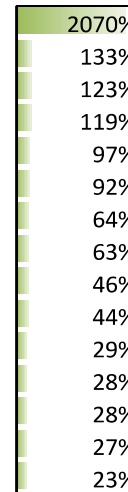
HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3131	Fiber, Yarn, and Thread Mills	114.1
3133	Textile and Fabric Finishing...	24.1
3132	Fabric Mills	17.5
3363	Motor Vehicle Parts Manufact...	11.9
3322	Cutlery and Handtool Manufac...	10.5
3379	Other Furniture Related Prod...	10.4
3327	Machine Shops; Turned Produc...	5.1
3332	Industrial Machinery Manufac...	5.0
3323	Architectural and Structural...	4.3
3252	Resin, Synthetic Rubber, and...	3.9
3149	Other Textile Product Mills	3.9
4884	Support Activities for Road ...	3.9
3371	Household and Institutional ...	3.7
6239	Other Residential Care Facil...	3.7
3251	Basic Chemical Manufacturing	3.4

FASTEST % GROWTH, Past 5 Years

NAICS	Description
7224	Drinking Places (Alcoholic B...
7121	Museums, Historical Sites, a...
8131	Religious Organizations
6111	Elementary and Secondary Sch...
3119	Other Food Manufacturing
3336	Engine, Turbine, and Power T...
5416	Management, Scientific, and ...
6214	Outpatient Care Centers
3251	Basic Chemical Manufacturing
5171	Wired Telecommunications Car...
5613	Employment Services
4539	Other Miscellaneous Store Re...
3149	Other Textile Product Mills
4511	Sporting Goods, Hobby, and M...
4529	Other General Merchandise St...

% Growth
2007-2012



FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3132	Fabric Mills	77%
5416	Management, Scientific, and ...	52%
7224	Drinking Places (Alcoholic B...	37%
5619	Other Support Services	36%
6241	Individual and Family Services	34%
6215	Medical and Diagnostic Labor...	34%
2389	Other Specialty Trade Contra...	32%
7121	Museums, Historical Sites, a...	29%
8131	Religious Organizations	28%
6213	Offices of Other Health Prac...	28%
6214	Outpatient Care Centers	27%
5242	Agencies, Brokerages, and Ot...	27%
4529	Other General Merchandise St...	27%
5111	Newspaper, Periodical, Book,...	26%
6212	Offices of Dentists	26%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

Employment Growth Trend

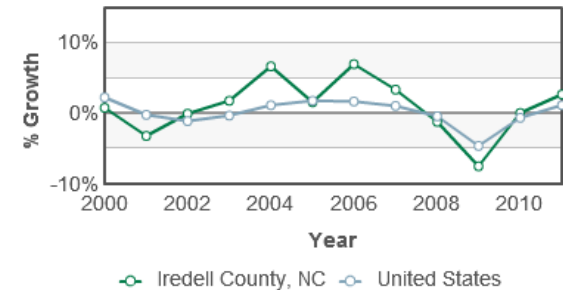
Key Statistics, 2011: Iredell County, NC

Employment Base:	62,600
Payroll Base:	\$2.5 B
Job Growth Rate:	2.7%
Payroll Growth Rate:	7.0%
Total Unemployed:	9,200
Unemployment Rate:	11.3%
Average Salary:	\$40,000

Percentage Growth: Iredell County job growth has outperformed the US over the past decade, but had a larger downturn during the recession. The county has rebounded faster than the US, reaching a 2.7 % growth rate in 2011.

IREDELL COUNTY, NC

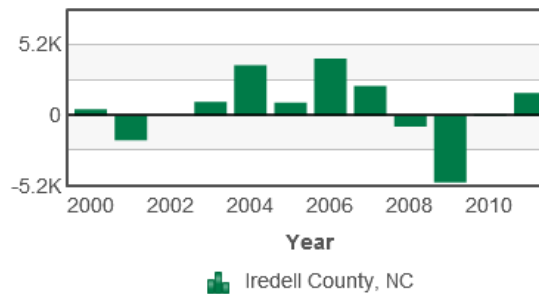
Annual Growth Rate, Employment, All Industries, 2000-2011
Iredell County, NC vs. U.S.



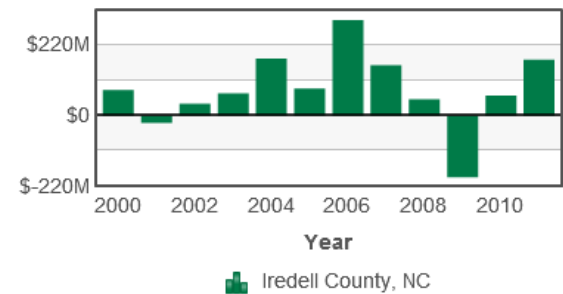
Net New Employment: During the recession, the county lost 4,900 jobs with all losses occurring in 2009. Job creation turned positive in 2010, and reached 1,700 in 2011.

Net New Payroll: The county's payroll base declined by \$193 million in 2009 but turned positive in 2010. Last year in 2011, the county's payroll grew by \$175 million.

Net New Employment, All Industries, 2000-2011
Iredell County, NC



Net New Payroll, All Industries, 2000-2011
Iredell County, NC



Industry Composition

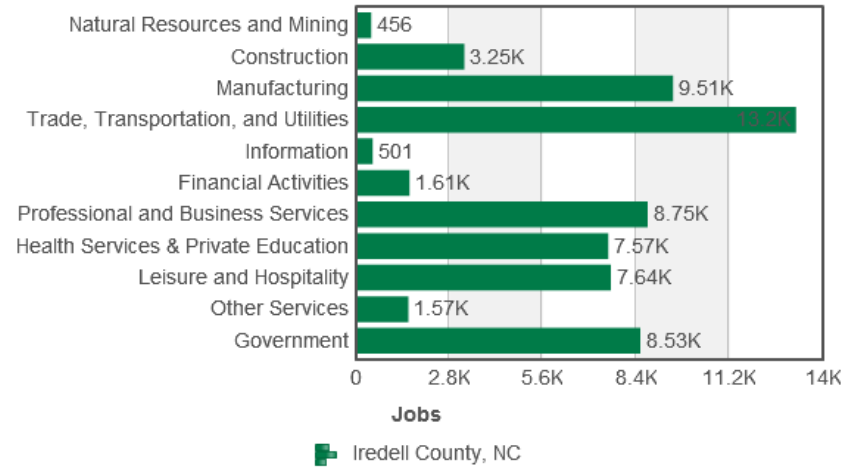
IREDELL COUNTY, NC

Top 3 Private Industries: Iredell County's three largest industries are Trade, Transportation and Utilities (13,200 jobs), Manufacturing (9,500) and Professional and Business Services (8,700).

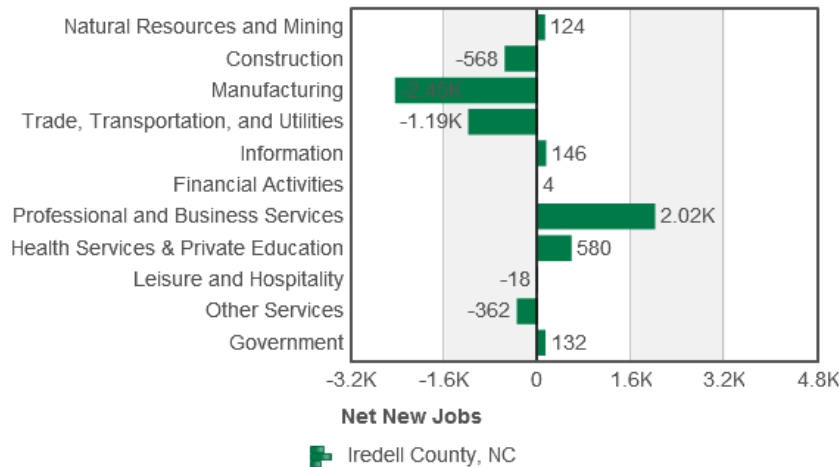
Net New Jobs: Of these industries, only Professional and Business Services created jobs (2,000) from 2006-2011. A majority of industries lost jobs, including Manufacturing (-2,400) and Trade (-1,200).

Percentage Growth: The Information industry grew 41.1% from 2006-2011, while US growth in the industry was -12%. Natural Resources and Mining (37.3%) and Professional and Business Services (29.9%) also experienced significant growth.

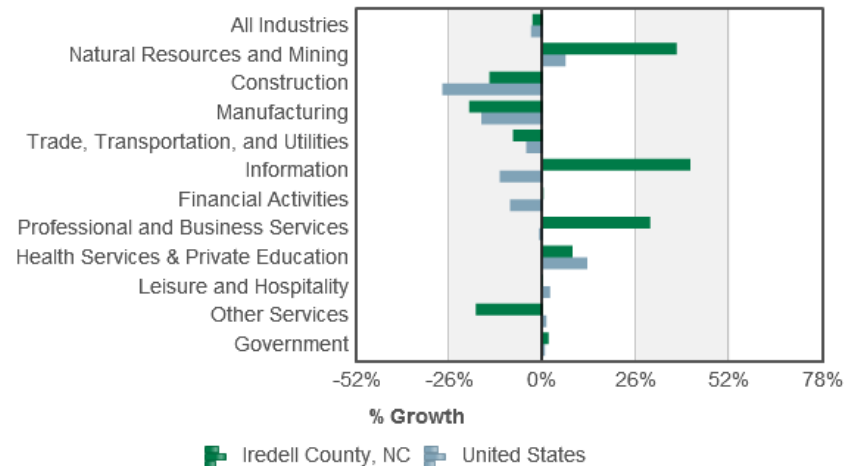
Employment by Industry, 2011
Iredell County, NC



New Jobs, 2006-2011
Iredell County, NC

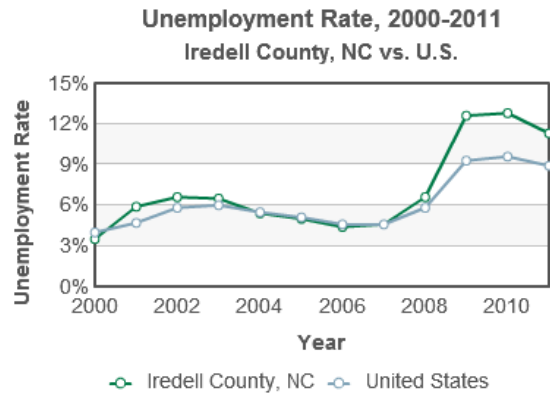


% Growth, Employment, 2006-2011
Iredell County, NC vs. U.S.

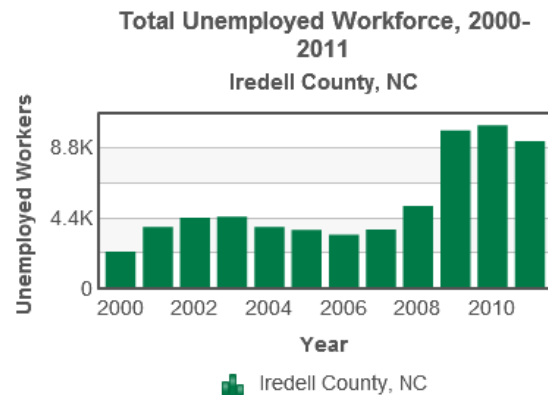


Workforce Conditions

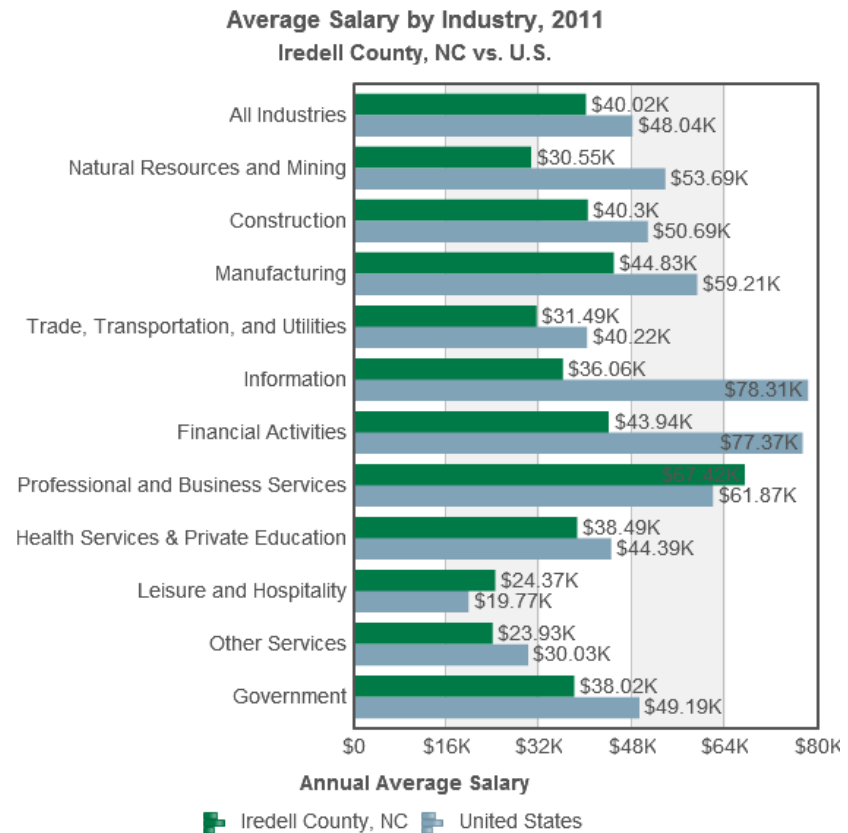
IREDELL COUNTY, NC



Unemployment: The unemployment rate in Iredell County, now 11.3%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 3,400 in 2006 to a peak of 10,200 in 2010 and has since declined.



Average Salary by Industry: Iredell County's average salary reached \$40,000 in 2011. The county's highest average salary is in Professional and Business Services, \$67,400. High salaries are also found in Manufacturing (\$44,800) and Financial Activities (\$43,900).



From 2010-2011, the three industries with the fastest growing salaries were Information (19.5%), Construction (10.4%), and Professional and Business Services (8.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

IREDELL COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
5511	Management of Companies and ...	3,872
7221	Full-Service Restaurants	2,924
7222	Limited-Service Eating Places	2,626
5613	Employment Services	2,010
6211	Offices of Physicians	1,617
4529	Other General Merchandise St...	1,514
4841	General Freight Trucking	1,414
6221	General Medical and Surgical...	1,326
7112	Spectator Sports	1,271
4451	Grocery Stores	1,149
2382	Building Equipment Contractors	945
4441	Building Material and Suppli...	834
4521	Department Stores	794
4231	Motor Vehicle and Motor Vehi...	756
2381	Foundation, Structure, and B...	742

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
5511	Management of Companies and ...	1,746
6211	Offices of Physicians	389
4451	Grocery Stores	280
5613	Employment Services	257
7139	Other Amusement and Recreati...	232
4431	Electronics and Appliance St...	116
3241	Petroleum and Coal Products ...	115
5619	Other Support Services	110
6111	Elementary and Secondary Sch...	104
5121	Motion Picture and Video Ind...	97
6212	Offices of Dentists	92
5611	Office Administrative Services	91
2371	Utility System Construction	86
4529	Other General Merchandise St...	78
3121	Beverage Manufacturing	70

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
5511	Management of Companies and ...	1,269
6211	Offices of Physicians	473
5613	Employment Services	373
6221	General Medical and Surgical...	291
7112	Spectator Sports	275
7222	Limited-Service Eating Places	239
4529	Other General Merchandise St...	235
3132	Fabric Mills	219
4231	Motor Vehicle and Motor Vehi...	218
6241	Individual and Family Services	214
7221	Full-Service Restaurants	171
2361	Residential Building Construc...	165
5619	Other Support Services	164
7139	Other Amusement and Recreati...	158
2382	Building Equipment Contractors	148

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3132	Fabric Mills	24.1
7112	Spectator Sports	21.2
3151	Apparel Knitting Mills	21.0
3332	Industrial Machinery Manufac...	15.5
3369	Other Transportation Equipme...	15.2
3325	Hardware Manufacturing	14.6
3272	Glass and Glass Product Manu...	9.0
3311	Iron and Steel Mills and Fer...	7.9
3221	Pulp, Paper, and Paperboard ...	7.2
3312	Steel Product Manufacturing ...	6.4
3149	Other Textile Product Mills	6.3
3113	Sugar and Confectionery Prod...	5.9
4231	Motor Vehicle and Motor Vehi...	5.0
3353	Electrical Equipment Manufac...	5.0
3111	Animal Food Manufacturing	4.9

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
5611	Office Administrative Services	134%
6242	Community Food and Housing, ...	127%
4921	Couriers and Express Deliver...	123%
5121	Motion Picture and Video Ind...	108%
4431	Electronics and Appliance St...	106%
5511	Management of Companies and ...	82%
3121	Beverage Manufacturing	68%
2212	Natural Gas Distribution	67%
6111	Elementary and Secondary Sch...	61%
7139	Other Amusement and Recreati...	58%
3149	Other Textile Product Mills	51%
5619	Other Support Services	47%
2371	Utility System Construction	44%
4451	Grocery Stores	32%
6211	Offices of Physicians	32%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3149	Other Textile Product Mills	51%
5619	Other Support Services	48%
2361	Residential Building Construc...	45%
3241	Petroleum and Coal Products ...	43%
4244	Grocery and Related Product ...	42%
5171	Wired Telecommunications Car...	42%
3132	Fabric Mills	40%
2373	Highway, Street, and Bridge ...	37%
6241	Individual and Family Services	35%
5511	Management of Companies and ...	33%
6116	Other Schools and Instructio...	32%
4931	Warehousing and Storage	31%
3121	Beverage Manufacturing	31%
6211	Offices of Physicians	29%
6212	Offices of Dentists	29%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

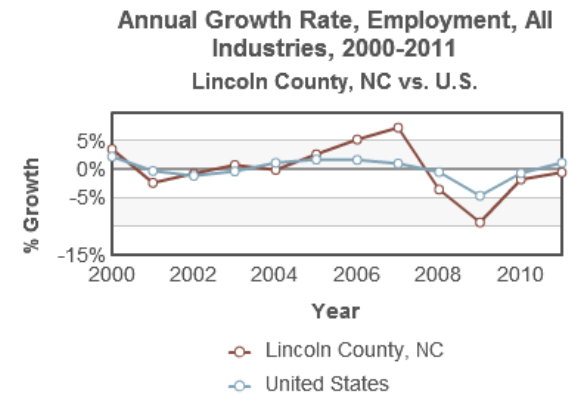
Employment Growth Trend

Key Statistics, 2011: Lincoln County, NC

Employment Base:	19,300
Payroll Base:	\$636 M
Job Growth Rate:	-0.5%
Payroll Growth Rate:	1.0%
Total Unemployed:	4,600
Unemployment Rate:	11.8%
Average Salary:	\$32,900

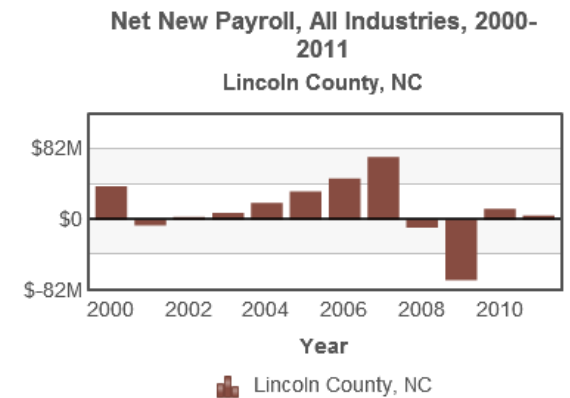
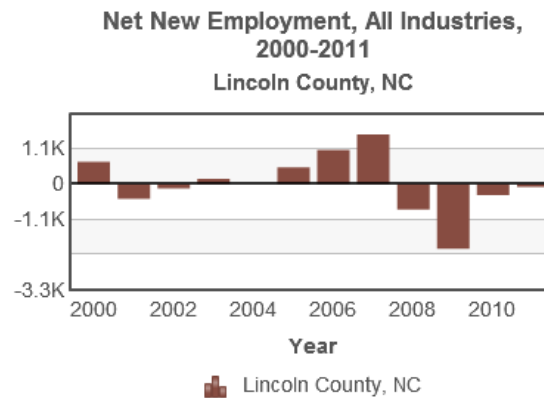
Percentage Growth: Lincoln County job growth has underperformed the US over the past decade, and had a larger downturn during the recession. The county has rebounded slightly slower than the US, reaching a -0.5 % growth rate in 2011.

LINCOLN COUNTY, NC



Net New Employment: During the recession, the county lost 2,400 jobs with most losses occurring in 2009. Job creation was still negative in 2011, with 100 lost.

Net New Payroll: The county's payroll base declined by \$71 million in 2009 but turned positive in 2010. Last year in 2011, the county's payroll grew by \$4.7 million.



Industry Composition

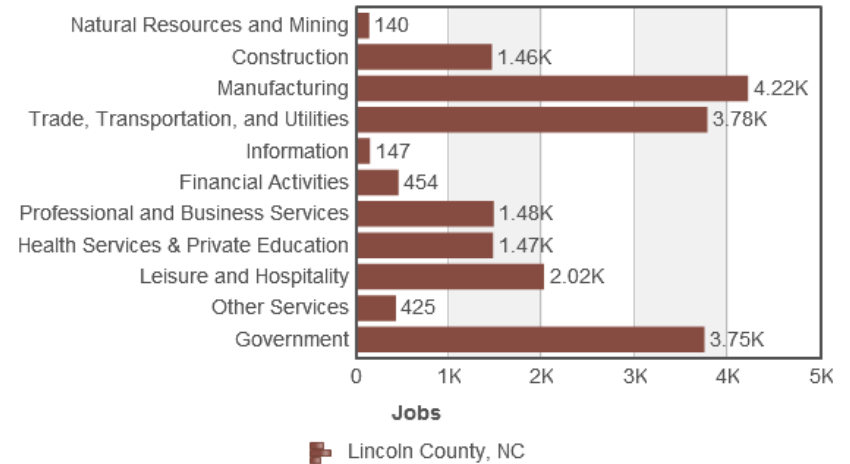
LINCOLN COUNTY, NC

Top 3 Private Industries: Lincoln County's largest industries are Manufacturing (4,200 jobs), Trade, Transportation and Utilities (3,780) and Leisure and Hospitality (2,000).

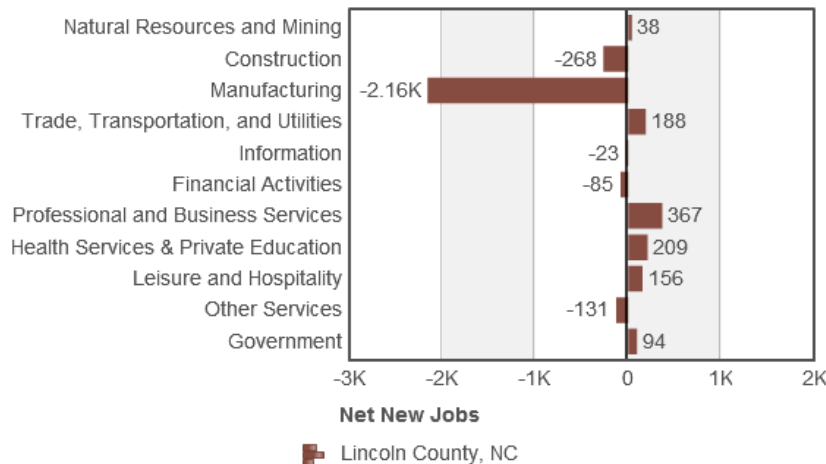
Net New Jobs: Of these industries from 2006-2011, only Manufacturing lost jobs (-2,160). A majority of industries created jobs, including Trade (190) and Leisure (160).

Percentage Growth: Natural Resources and Mining grew 37.3% from 2006-2011, while US growth in the industry was -6.4%. Professional and Business Services (32.9%) and Health Services (16.5%) also experienced significant growth.

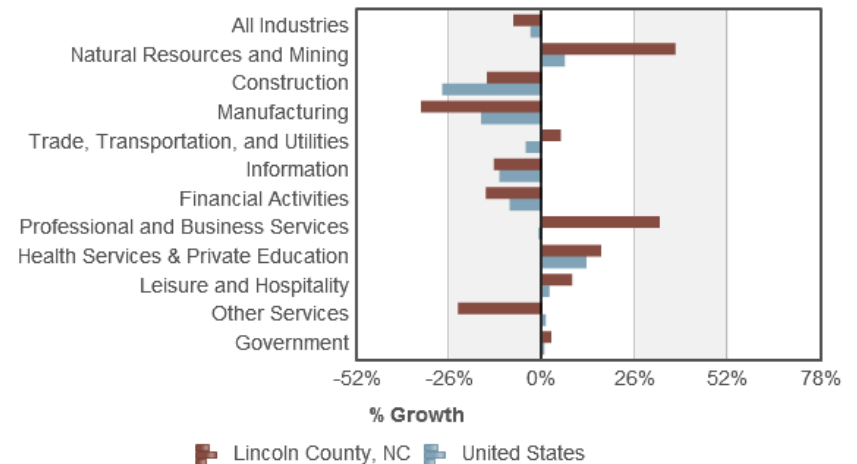
Employment by Industry, 2011
Lincoln County, NC



New Jobs, 2006-2011
Lincoln County, NC

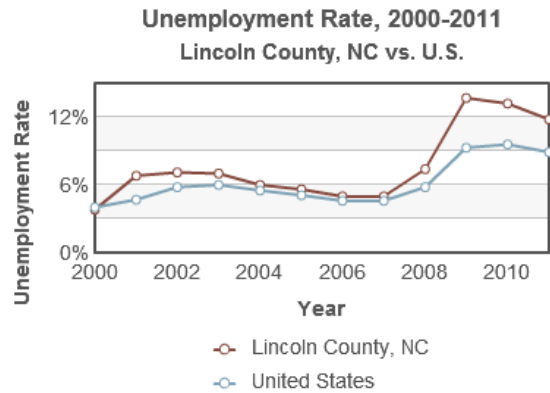


% Growth, Employment, 2006-2011
Lincoln County, NC vs. U.S.

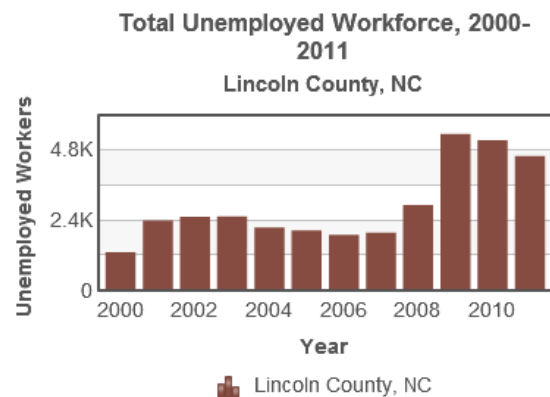


Workforce Conditions

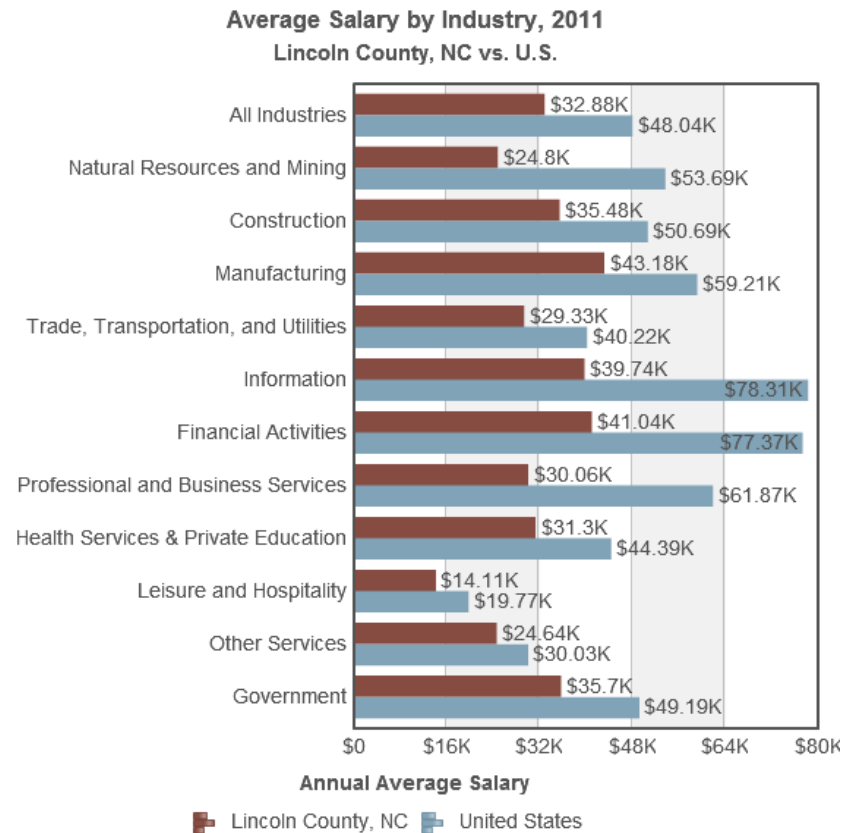
LINCOLN COUNTY, NC



Unemployment: The unemployment rate in Lincoln County, now 11.8%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 1,910 in 2006 to a peak of 5,360 in 2009 and has since declined.



Average Salary by Industry: Lincoln County's average salary reached \$32,900 in 2011. The county's highest average salary is in Manufacturing, \$43,200. High salaries are also found in Financial Activities (\$41,000) and Information (\$39,700).



From 2010-2011, the three industries with the fastest growing salaries were Financial Activities (5.8%), Construction (4.9%), and Professional and Business Services (4.4%).

Top 15 Private Sector Industries by 4-Digit NAICS

LINCOLN COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7222	Limited-Service Eating Places	1,149
3329	Other Fabricated Metal Produ...	904
3371	Household and Institutional ...	662
7221	Full-Service Restaurants	643
4529	Other General Merchandise St...	583
4451	Grocery Stores	537
2382	Building Equipment Contractors	485
5617	Services to Buildings and Dw...	372
6231	Nursing Care Facilities	365
2381	Foundation, Structure, and B...	360
4441	Building Material and Suppli...	340
3132	Fabric Mills	333
7139	Other Amusement and Recreat...	300
2383	Building Finishing Contractors	286
4461	Health and Personal Care Sto...	274

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
4529	Other General Merchandise St...	385
7222	Limited-Service Eating Places	194
3325	Hardware Manufacturing	168
7139	Other Amusement and Recreat...	134
5416	Management, Scientific, and ...	113
2383	Building Finishing Contractors	99
3311	Iron and Steel Mills and Fer...	90
3342	Communications Equipment Man...	83
3252	Resin, Synthetic Rubber, and...	80
5619	Other Support Services	73
5617	Services to Buildings and Dw...	70
3312	Steel Product Manufacturing ...	66
6111	Elementary and Secondary Sch...	57
3255	Paint, Coating, and Adhesive...	55
4231	Motor Vehicle and Motor Vehi...	50

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
2383	Building Finishing Contractors	293
3325	Hardware Manufacturing	212
4529	Other General Merchandise St...	192
7222	Limited-Service Eating Places	178
3363	Motor Vehicle Parts Manufact...	167
2381	Foundation, Structure, and B...	156
2382	Building Equipment Contractors	146
5617	Services to Buildings and Dw...	135
3371	Household and Institutional ...	121
4441	Building Material and Suppli...	80
5416	Management, Scientific, and ...	65
6211	Offices of Physicians	65
7139	Other Amusement and Recreat...	61
6231	Nursing Care Facilities	61
8111	Automotive Repair and Mainte...	59

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3325	Hardware Manufacturing	74.1
3132	Fabric Mills	46.7
4889	Other Support Activities for...	40.9
3329	Other Fabricated Metal Produ...	24.2
3371	Household and Institutional ...	21.3
3133	Textile and Fabric Finishing...	20.1
2213	Water, Sewage and Other Syst...	10.4
3252	Resin, Synthetic Rubber, and...	9.3
3259	Other Chemical Product and P...	8.2
3312	Steel Product Manufacturing ...	7.8
3311	Iron and Steel Mills and Fer...	7.5
3255	Paint, Coating, and Adhesive...	7.2
3328	Coating, Engraving, Heat Tre...	6.3
3331	Agriculture, Construction, a...	5.4
3342	Communications Equipment Man...	5.2

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3311	Iron and Steel Mills and Fer...	1800%
3255	Paint, Coating, and Adhesive...	1100%
5416	Management, Scientific, and ...	297%
4231	Motor Vehicle and Motor Vehi...	294%
5619	Other Support Services	235%
3325	Hardware Manufacturing	215%
7112	Spectator Sports	206%
4529	Other General Merchandise St...	194%
3252	Resin, Synthetic Rubber, and...	190%
4539	Other Miscellaneous Store Re...	168%
7139	Other Amusement and Recreat...	81%
6111	Elementary and Secondary Sch...	62%
2213	Water, Sewage and Other Syst...	60%
6213	Offices of Other Health Prac...	55%
2383	Building Finishing Contractors	53%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
2383	Building Finishing Contractors	102%
3363	Motor Vehicle Parts Manufact...	101%
3325	Hardware Manufacturing	86%
2362	Nonresidential Building Cons...	61%
5619	Other Support Services	55%
3311	Iron and Steel Mills and Fer...	52%
3312	Steel Product Manufacturing ...	48%
7112	Spectator Sports	48%
3328	Coating, Engraving, Heat Tre...	47%
2381	Foundation, Structure, and B...	43%
5416	Management, Scientific, and ...	43%
5222	Nondepository Credit Interme...	40%
3323	Architectural and Structural...	39%
6213	Offices of Other Health Prac...	36%
5617	Services to Buildings and Dw...	36%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

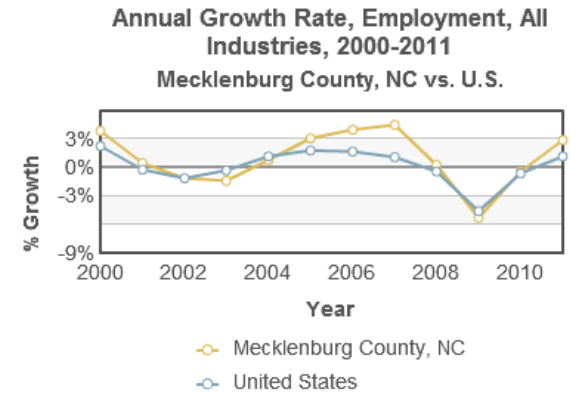
Employment Growth Trend

Key Statistics, 2011: Mecklenburg County, NC

Employment Base:	551,000
Payroll Base:	\$31 M
Job Growth Rate:	2.9%
Payroll Growth Rate:	6.0%
Total Unemployed:	50,500
Unemployment Rate:	10.7%
Average Salary:	\$56,100

% Growth Rate: Mecklenburg County job growth has outperformed the US over the past decade, but had a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 2.9% growth rate in 2011.

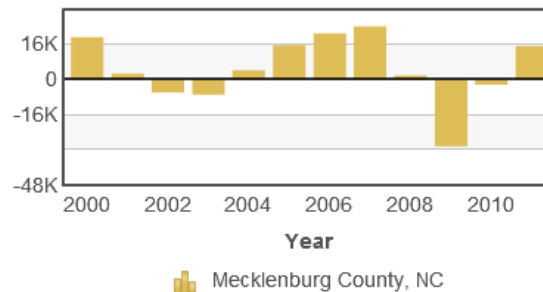
MECKLENBURG COUNTY, NC



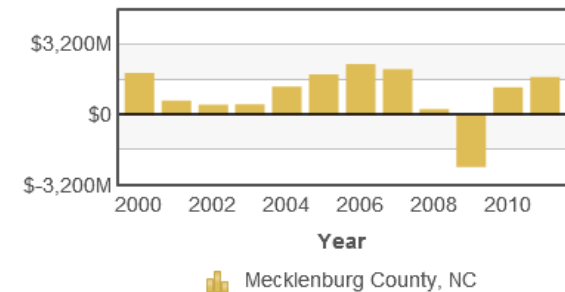
Net New Employment: During the recession, the county lost 33,00 jobs with nearly all job losses occurring in 2009. Job creation turned positive in 2011, with 15,000 jobs created.

Net New Payroll: The county's payroll base declined by \$2.4 billion in 2009 but turned positive in 2010, one year before job growth turned positive. Last year in 2011, the county's payroll grew by \$1.5 billion.

Net New Employment, All Industries, 2000-2011
Mecklenburg County, NC



Net New Payroll, All Industries, 2000-2011
Mecklenburg County, NC



Industry Composition

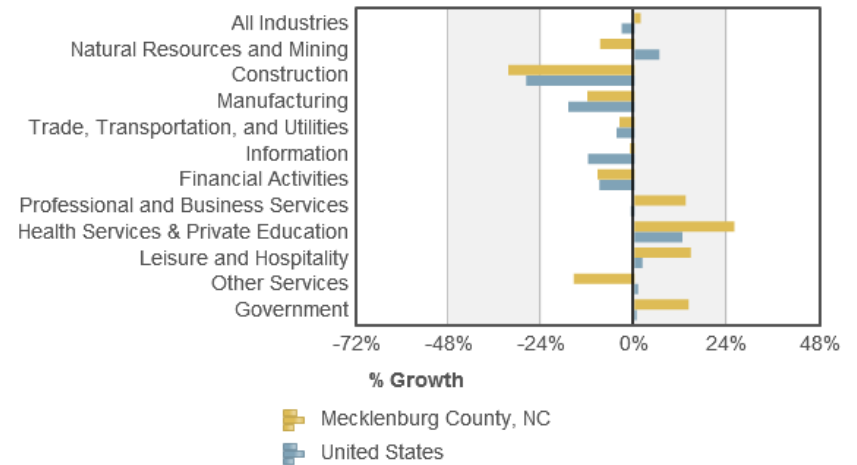
MECKLENBURG COUNTY, NC

Top Industries: Mecklenburg County's largest industries are Professional & Business Services (112,000 jobs), Trade, Transportation & Utilities (113,000) and Financial Activities (59,300).

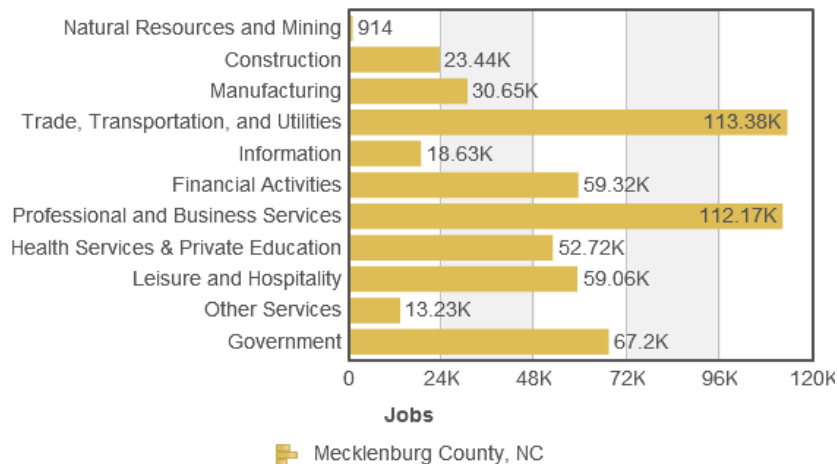
% Growth by Industry: Health Services (which includes Private Education providers) has been the leading growth industry in the county, followed by Leisure & Hospitality and Government. Health Services grew 26% from 2006-2011, more than twice US growth in the industry. The other two leading industries grew about 14%.

New Jobs by Industry: During the period 2006-2011, Professional Service created the most jobs (13,100). Health Services (10,800 jobs) and Government (8,200) were the other two top creators.

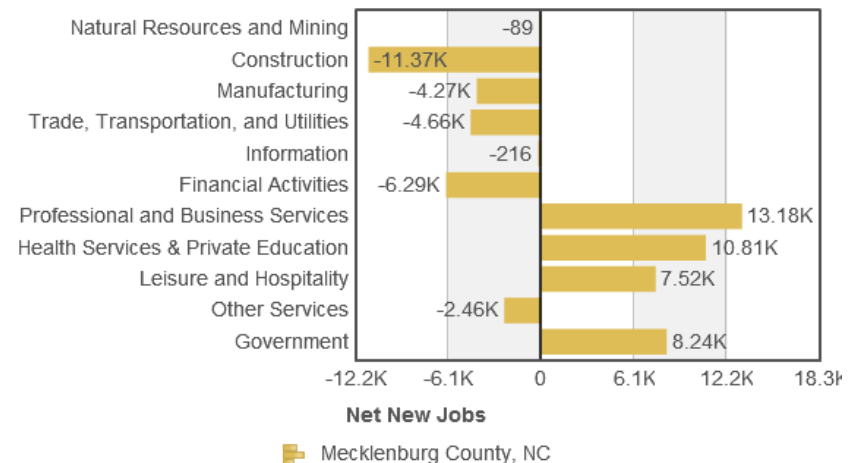
% Growth, Employment, 2006-2011
Mecklenburg County, NC vs. U.S.



Employment by Industry, 2011
Mecklenburg County, NC



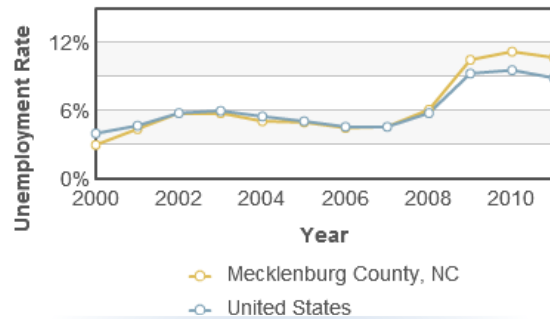
New Jobs, 2006-2011
Mecklenburg County, NC



Workforce Conditions

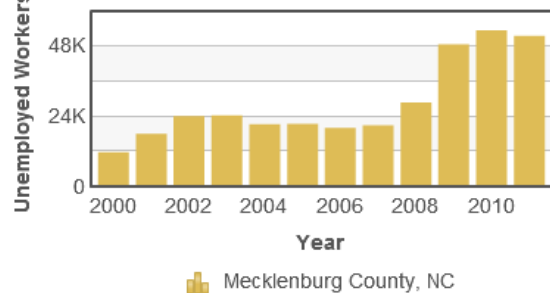
MECKLENBURG COUNTY, NC

Unemployment Rate, 2000-2011
Mecklenburg County, NC vs. U.S.



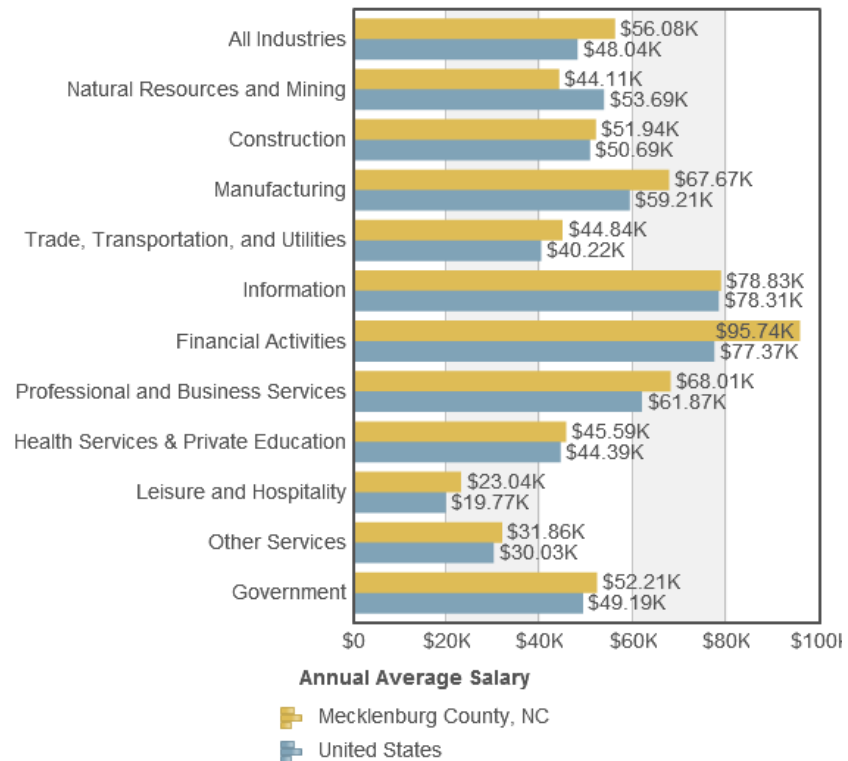
Unemployment: The unemployment rate in Mecklenburg County, now 10.7%, surpassed the US rate in 2009 for the first time in the decade. The number of unemployed workers in the county grew from 21,000 in 2007 to a peak of 53,500 in 2010 and has since declined.

Total Unemployed Workforce, 2000-2011
Mecklenburg County, NC



Average Salary by Industry: Mecklenburg County's average salary reached \$56,100 in 2011. The county's highest average salary is in the Financial Activities industry, \$95,800, which is far higher than the US average for the industry. High salaries are also found in Information (\$78,800) and Professional and Business Services (\$68,000).

Average Salary by Industry, 2011
Mecklenburg County, NC vs. U.S.



In 2011, the three industries with the fastest growing salaries were Natural Resources and Mining (9.6%), Financial Activities (5.3%) and Manufacturing (4.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

MECKLENBURG COUNTY, NC

LARGEST EMPLOYMENT			MOST NEW JOBS, Past 5 Years		Net New Jobs	FORECASTED NEW JOBS, Next 5 Years		Net New Jobs
NAICS	Industry	Jobs	NAICS	Description	2007-2012	NAICS	Description	2012-2017
5511	Management of Companies and ...	24,875	7222	Limited-Service Eating Places	2,716	5221	Depository Credit Intermedia...	4,834
5221	Depository Credit Intermedia...	23,607	7139	Other Amusement and Recreati...	2,461	5416	Management, Scientific, and ...	3,707
7221	Full-Service Restaurants	21,090	6211	Offices of Physicians	2,249	7222	Limited-Service Eating Places	3,050
7222	Limited-Service Eating Places	20,591	7221	Full-Service Restaurants	2,046	6211	Offices of Physicians	2,457
5613	Employment Services	19,950	5416	Management, Scientific, and ...	1,866	7221	Full-Service Restaurants	2,044
5416	Management, Scientific, and ...	10,131	5511	Management of Companies and ...	1,697	5613	Employment Services	1,871
6211	Offices of Physicians	10,123	6223	Specialty (except Psychiatri...	1,309	7139	Other Amusement and Recreati...	1,743
2382	Building Equipment Contractors	8,796	6113	Colleges, Universities, and ...	1,083	6241	Individual and Family Services	1,581
4451	Grocery Stores	8,482	4251	Wholesale Electronic Markets...	1,010	5616	Investigation and Security S...	1,551
5617	Services to Buildings and Dw...	7,881	6216	Home Health Care Services	868	2382	Building Equipment Contractors	1,417
5413	Architectural, Engineering, ...	7,404	5614	Business Support Services	828	5239	Other Financial Investment A...	1,341
5241	Insurance Carriers	6,915	5415	Computer Systems Design and ...	824	5617	Services to Buildings and Dw...	1,286
7139	Other Amusement and Recreati...	6,606	6111	Elementary and Secondary Sch...	755	5614	Business Support Services	1,006
4521	Department Stores	6,577	5239	Other Financial Investment A...	665	4529	Other General Merchandise St...	925
4238	Machinery, Equipment, and Su...	6,481	6212	Offices of Dentists	609	2362	Nonresidential Building Cons...	877

HIGHEST SPECIALIZATION (High LQ)			FASTEST % GROWTH, Past 5 Years		% Growth	FORECASTED % GROWTH, Next 5 Years		% Growth
NAICS	Industry	Location Quotient	NAICS	Description	2007-2012	NAICS	Description	2012-2017
3346	Manufacturing and Reproduc...	12.3	6223	Specialty (except Psychiatri...	2567%	5612	Facilities Support Services	52%
4852	Interurban and Rural Bus Tra...	10.0	5191	Other Information Services	146%	8131	Religious Organizations	48%
5152	Cable and Other Subscription...	6.5	3132	Fabric Mills	104%	6241	Individual and Family Services	45%
5182	Data Processing, Hosting, an...	5.7	5112	Software Publishers	92%	5112	Software Publishers	45%
4811	Scheduled Air Transportation	5.0	5417	Scientific Research and Deve...	78%	5416	Management, Scientific, and ...	37%
5179	Other Telecommunications	3.6	6216	Home Health Care Services	60%	4232	Furniture and Home Furnishin...	33%
7112	Spectator Sports	3.5	7139	Other Amusement and Recreati...	59%	4248	Beer, Wine, and Distilled Al...	32%
3336	Engine, Turbine, and Power T...	3.4	6214	Outpatient Care Centers	58%	8139	Business, Professional, Labo...	32%
5239	Other Financial Investment A...	3.4	3119	Other Food Manufacturing	45%	4242	Drugs and Druggists' Sundrie...	32%
4831	Deep Sea, Coastal, and Great...	3.3	6113	Colleges, Universities, and ...	42%	5611	Office Administrative Services	31%
5221	Depository Credit Intermedia...	3.3	4232	Furniture and Home Furnishin...	41%	5616	Investigation and Security S...	30%
3132	Fabric Mills	3.3	6111	Elementary and Secondary Sch...	35%	5152	Cable and Other Subscription...	29%
5511	Management of Companies and ...	3.2	4831	Deep Sea, Coastal, and Great...	33%	2362	Nonresidential Building Cons...	29%
4238	Machinery, Equipment, and Su...	3.2	6215	Medical and Diagnostic Labor...	33%	5239	Other Financial Investment A...	28%
5151	Radio and Television Broadca...	2.6	5612	Facilities Support Services	30%	7139	Other Amusement and Recreati...	26%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com) Note: % Growth includes only industries with more than 500 jobs.

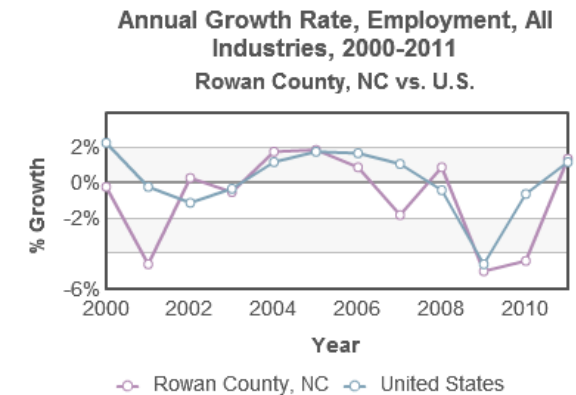
Employment Growth Trend

Key Statistics, 2011: Rowan County, NC

Employment Base:	44,400
Payroll Base:	\$1.7 B
Job Growth Rate:	1.4%
Payroll Growth Rate:	2.4%
Total Unemployed:	8,200
Unemployment Rate:	11.6%
Average Salary:	\$37,700

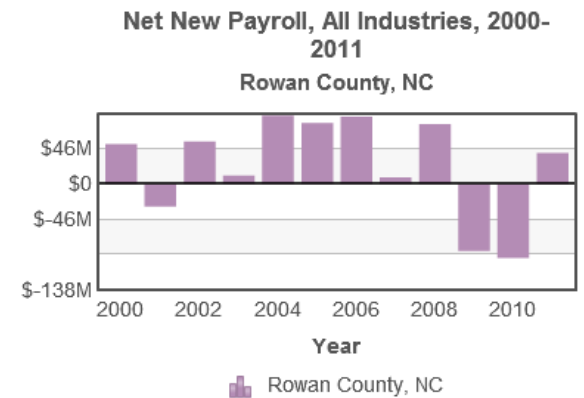
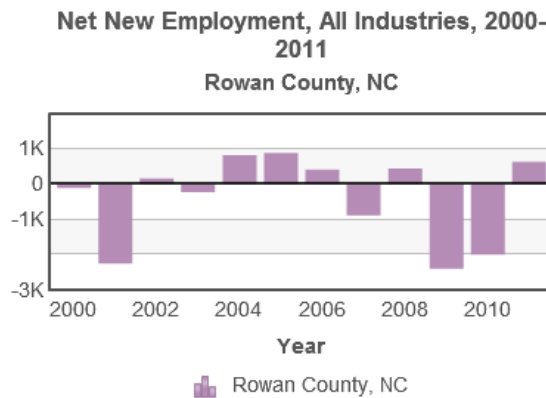
Percentage Growth: Rowan County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 1.4% growth rate in 2011.

ROWAN COUNTY, NC



Net New Employment: During the recession, the county lost 4,400 jobs with half of all losses occurring in 2009. Job creation turned positive in 2011, with 630 created.

Net New Payroll: The county's payroll base declined by \$87 million in 2009 but turned positive in 2010, two years before job growth turned positive. Last year in 2011, the county's payroll grew by \$40.4 million.



Industry Composition

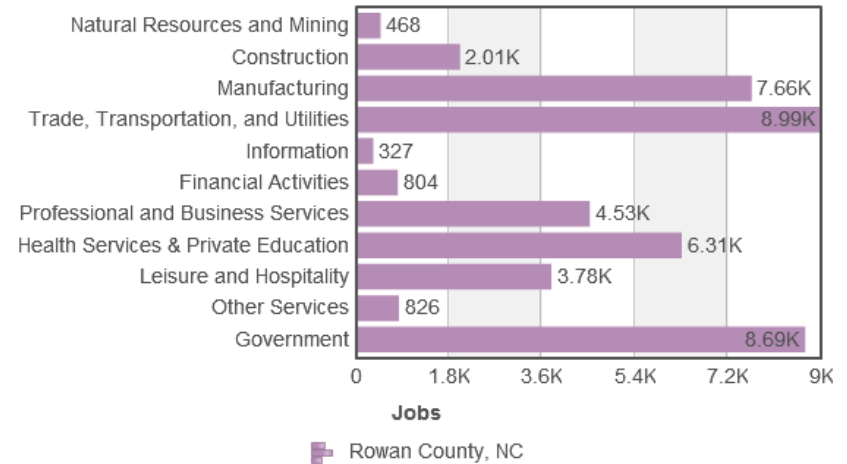
ROWAN COUNTY, NC

Top 3 Private Industries: Rowan County's three largest industries are Trade, Transportation and Utilities (9,000 jobs), Manufacturing (7,700), and Health Services (6,300).

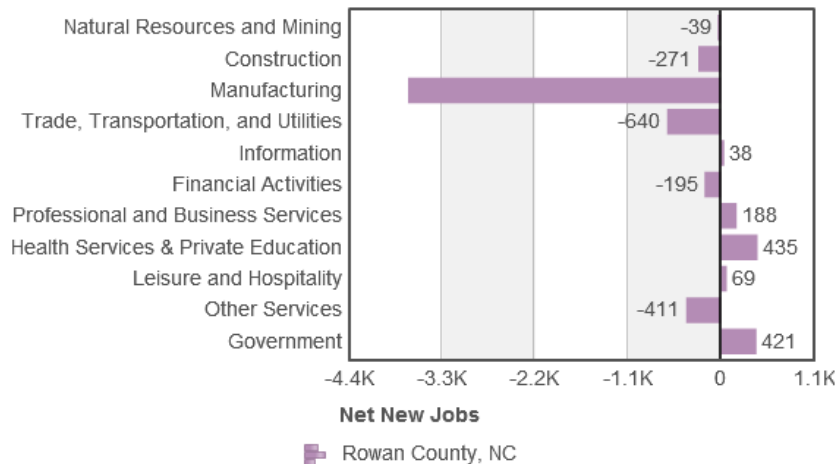
Net New Jobs: Only one of the largest industries created jobs from 2006-2011, Health Services with 435. Of the other two, Manufacturing lost 3,700 jobs and Trade lost 640.

Percentage Growth: A majority of industries had a negative percentage growth over the period 2006-2011, with the largest loss in Other Services (-33.2%). Other industries that had negative growth were Manufacturing (32.6%) and Financial Activities (-19.5%).

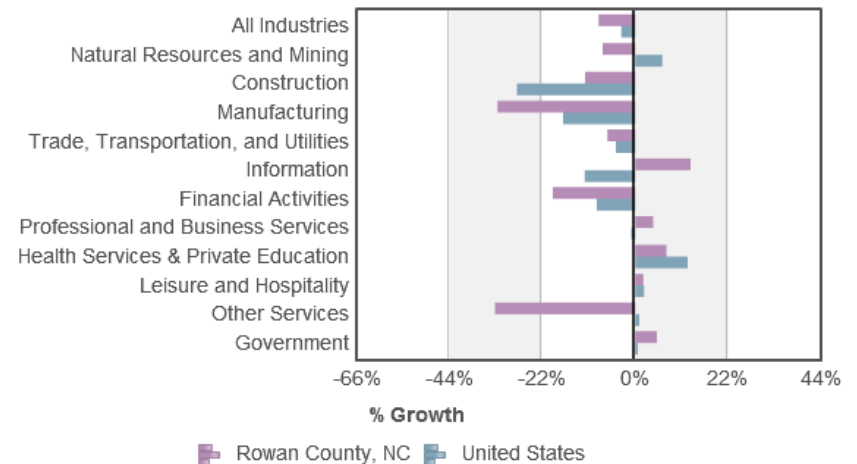
Employment by Industry, 2011
Rowan County, NC



New Jobs, 2006-2011
Rowan County, NC

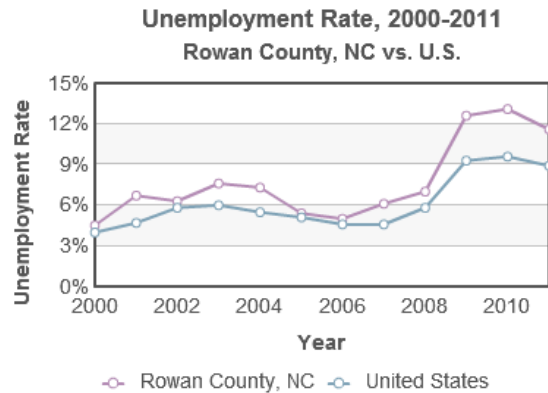


% Growth, Employment, 2006-2011
Rowan County, NC vs. U.S.

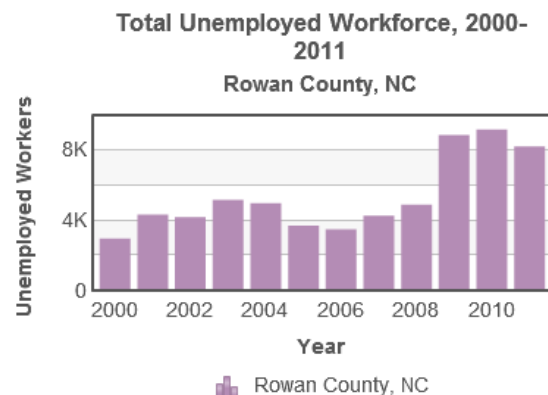


Workforce Conditions

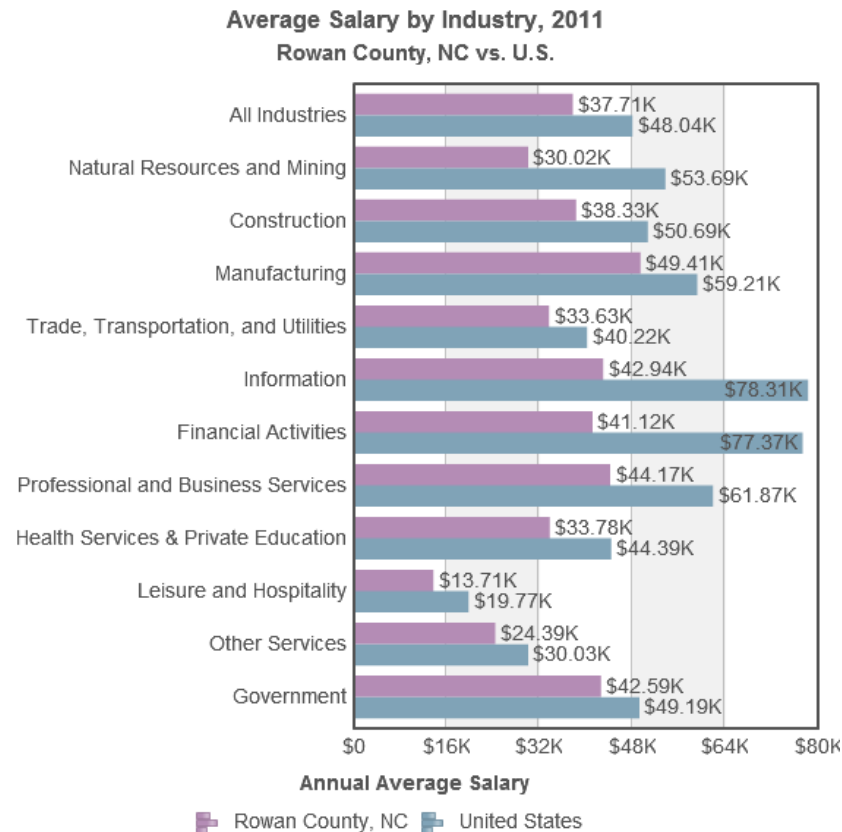
ROWAN COUNTY, NC



Unemployment: The unemployment rate in Rowan County, now 11.6%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 3,500 in 2006 to a peak of 9,200 in 2010 and has since declined.



Average Salary by Industry: Rowan County's average salary reached \$37,700 in 2011. The county's highest average salary is in Manufacturing, \$49,400. High salaries are also found in Professional Services (\$44,200) and Information (\$42,900).



From 2010-2011, the three industries with the fastest growing salaries were Manufacturing (12.5%), Financial Activities (4.1%), and Construction (2.6%).

Top 15 Private Sector Industries by 4-Digit NAICS

ROWAN COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
5511	Management of Companies and ...	2,400
3361	Motor Vehicle Manufacturing	2,180
7222	Limited-Service Eating Places	1,608
7221	Full-Service Restaurants	1,467
6221	General Medical and Surgical...	1,269
4931	Warehousing and Storage	1,236
6231	Nursing Care Facilities	1,008
2382	Building Equipment Contractors	913
4451	Grocery Stores	880
4841	General Freight Trucking	815
4529	Other General Merchandise St...	716
6216	Home Health Care Services	624
6113	Colleges, Universities, and ...	604
3222	Converted Paper Product Manu...	584
7139	Other Amusement and Recepti...	552

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
3323	Architectural and Structural...	425
6216	Home Health Care Services	356
7139	Other Amusement and Recepti...	234
4238	Machinery, Equipment, and Su...	177
3222	Converted Paper Product Manu...	162
2362	Nonresidential Building Cons...	118
3254	Pharmaceutical and Medicine ...	107
4521	Department Stores	104
2381	Foundation, Structure, and B...	101
5413	Architectural, Engineering, ...	89
4841	General Freight Trucking	88
4529	Other General Merchandise St...	84
4931	Warehousing and Storage	79
4231	Motor Vehicle and Motor Vehi...	68
6243	Vocational Rehabilitation Se...	60

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
3363	Motor Vehicle Parts Manufact...	326
2381	Foundation, Structure, and B...	259
4931	Warehousing and Storage	229
5511	Management of Companies and ...	229
6216	Home Health Care Services	216
2382	Building Equipment Contractors	213
6221	General Medical and Surgical...	170
4841	General Freight Trucking	163
4529	Other General Merchandise St...	137
7139	Other Amusement and Recepti...	121
6231	Nursing Care Facilities	119
3132	Fabric Mills	115
4238	Machinery, Equipment, and Su...	96
5617	Services to Buildings and Dw...	91
4244	Grocery and Related Product ...	86

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3361	Motor Vehicle Manufacturing	43.6
3131	Fiber, Yarn, and Thread Mills	20.2
4889	Other Support Activities for...	18.2
3271	Clay Product and Refractory ...	18.2
3252	Resin, Synthetic Rubber, and...	14.9
2123	Nonmetallic Mineral Mining a...	6.4
3222	Converted Paper Product Manu...	6.4
3262	Rubber Product Manufacturing	6.0
4931	Warehousing and Storage	5.7
3219	Other Wood Product Manufactu...	5.2
3323	Architectural and Structural...	4.5
5511	Management of Companies and ...	3.8
3363	Motor Vehicle Parts Manufact...	3.5
3353	Electrical Equipment Manufac...	3.4
4233	Lumber and Other Constructio...	3.1

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3254	Pharmaceutical and Medicine ...	2140%
3323	Architectural and Structural...	675%
2362	Nonresidential Building Cons...	179%
6216	Home Health Care Services	133%
4238	Machinery, Equipment, and Su...	132%
6213	Offices of Other Health Prac...	77%
7139	Other Amusement and Recepti...	74%
5413	Architectural, Engineering, ...	73%
4521	Department Stores	66%
4231	Motor Vehicle and Motor Vehi...	45%
3222	Converted Paper Product Manu...	38%
2381	Foundation, Structure, and B...	35%
5617	Services to Buildings and Dw...	17%
8133	Social Advocacy Organizations	15%
6244	Child Day Care Services	14%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3363	Motor Vehicle Parts Manufact...	69%
2381	Foundation, Structure, and B...	67%
3273	Cement and Concrete Product ...	39%
4244	Grocery and Related Product ...	37%
3254	Pharmaceutical and Medicine ...	35%
6216	Home Health Care Services	35%
4238	Machinery, Equipment, and Su...	31%
6213	Offices of Other Health Prac...	31%
8133	Social Advocacy Organizations	29%
4412	Other Motor Vehicle Dealers	28%
2362	Nonresidential Building Cons...	26%
5413	Architectural, Engineering, ...	25%
6212	Offices of Dentists	24%
5617	Services to Buildings and Dw...	24%
2382	Building Equipment Contractors	23%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

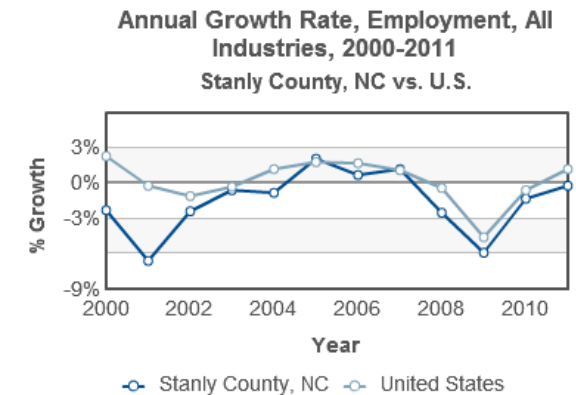
Employment Growth Trend

Key Statistics, 2011: Stanly County, NC

Employment Base:	18,000
Payroll Base:	\$556 M
Job Growth Rate:	-0.2%
Payroll Growth Rate:	1.1%
Total Unemployed:	3,500
Unemployment Rate:	11.5%
Average Salary:	\$30,900

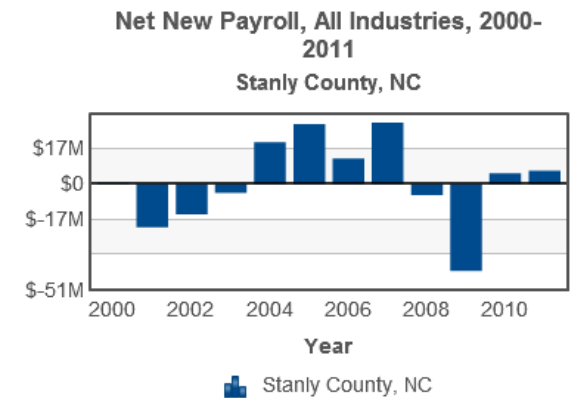
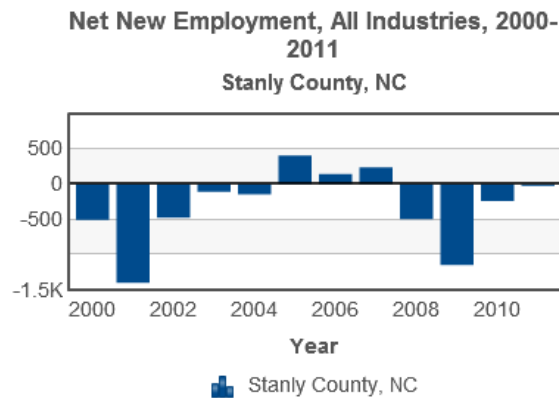
Percentage Growth: Stanly County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slower than the US, reaching a -0.2% growth rate in 2011.

STANLY COUNTY, NC



Net New Employment: During the recession, the county lost 1,400 jobs with nearly all losses occurring in 2009. Job creation stayed negative in 2011, with 30 lost.

Net New Payroll: The county's payroll base declined by \$42 million in 2009 but turned positive in 2010. Last year in 2011, the county's payroll grew by \$6.4 million.



Industry Composition

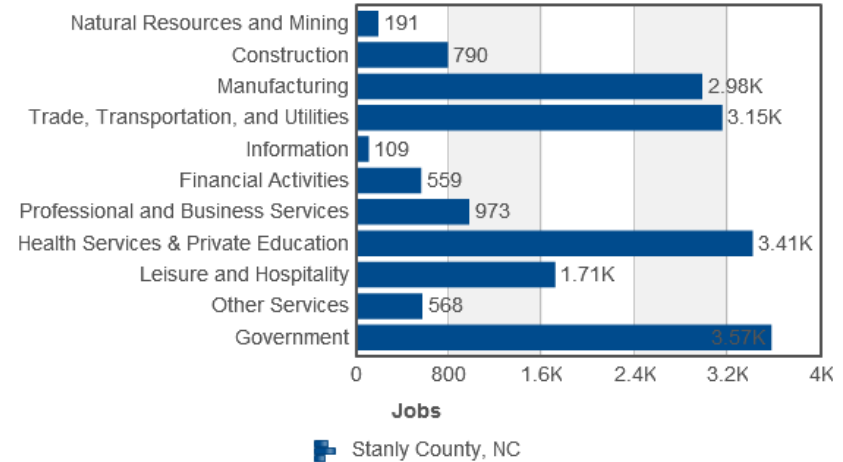
STANLY COUNTY, NC

Top 3 Private Industries: Stanly County's three largest industries are Health Services (3,400 jobs), Trade, Transportation and Utilities (3,200), and Manufacturing (3,000).

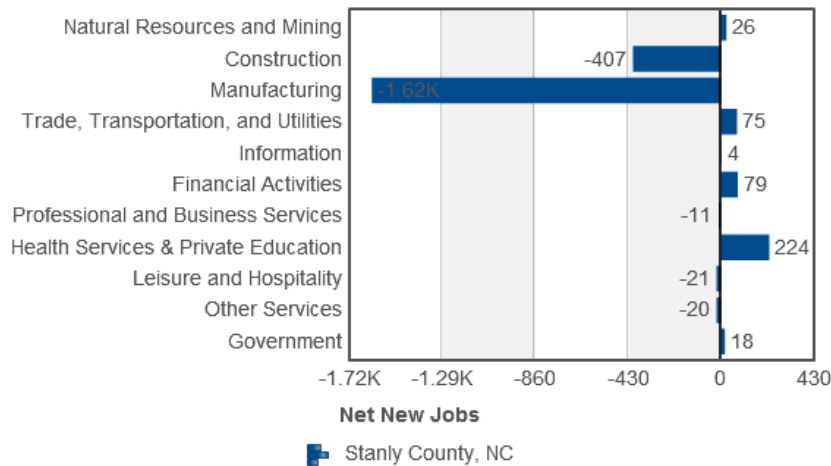
Net New Jobs: Of these industries, only Manufacturing lost jobs (-1600) from 2006-2011. A majority of industries gained jobs, including Health Services (220) and Trade, Transportation and Utilities (75).

Percentage Growth: Manufacturing more than doubled negative US growth from 2006-2011 with -35.2%. Financial Activities (16.5%) and Natural Resources (15.8%) had large growth over the same period.

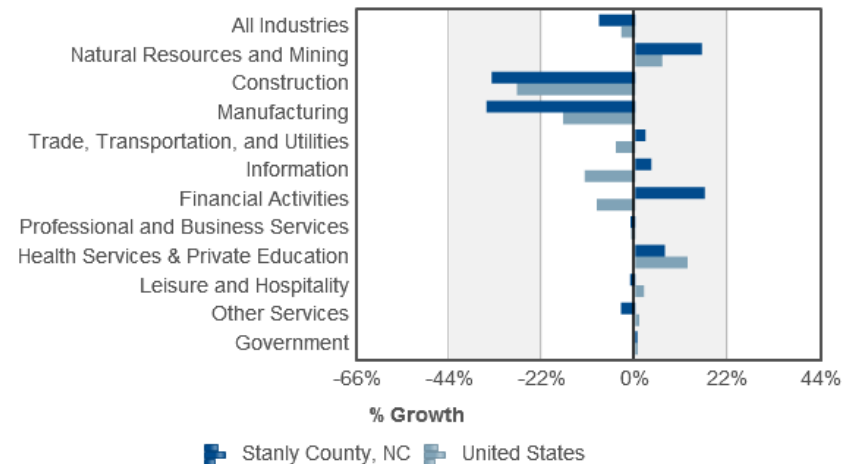
Employment by Industry, 2011
Stanly County, NC



New Jobs, 2006-2011
Stanly County, NC

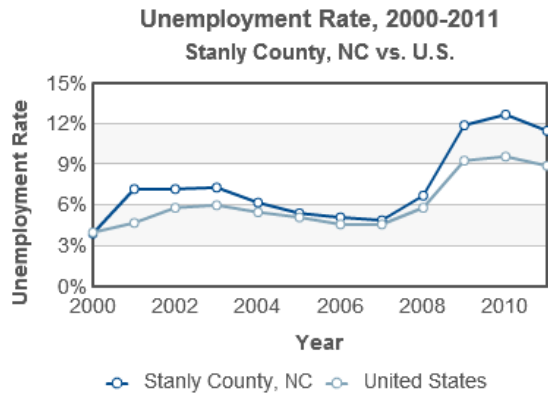


% Growth, Employment, 2006-2011
Stanly County, NC vs. U.S.

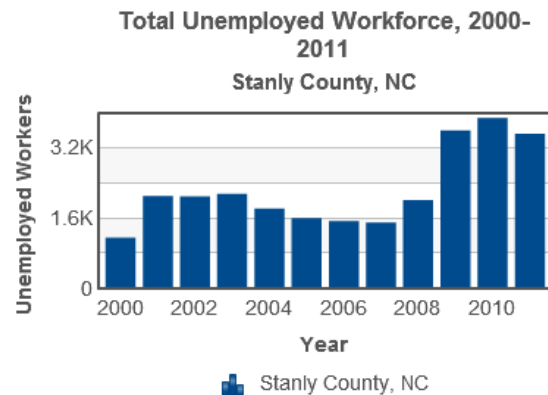


Workforce Conditions

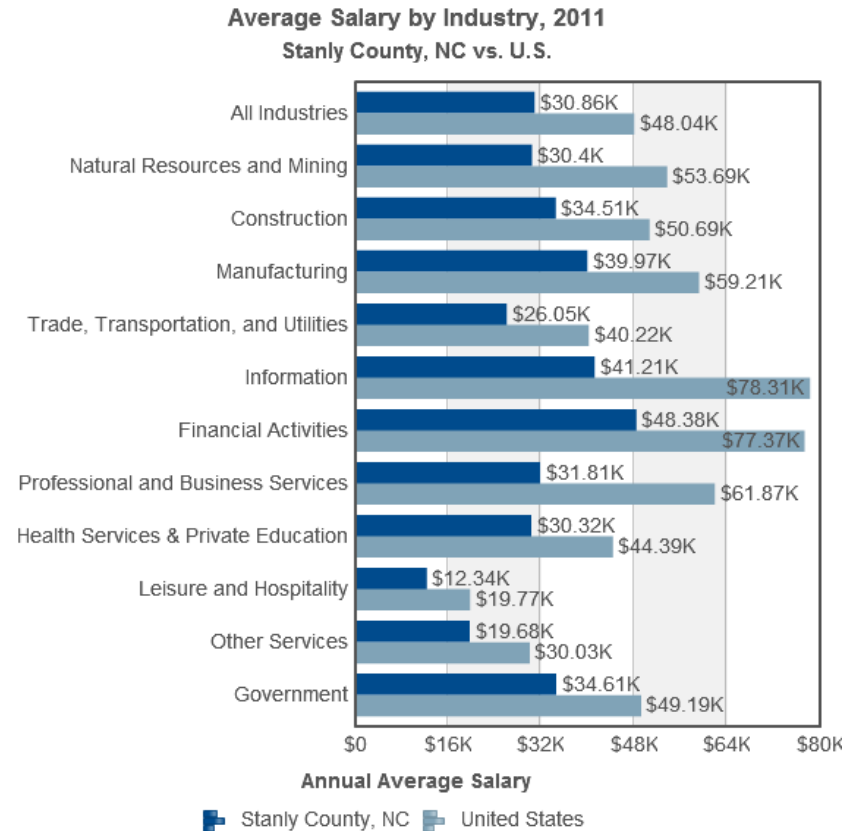
STANLY COUNTY, NC



Unemployment: The unemployment rate in Stanly County, now 11.5%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 1,500 in 2007 to a peak of 3,900 in 2010 and has since declined.



Average Salary by Industry: Stanly County's average salary reached \$30,900 in 2011. The county's highest average salary is in Financial Activities, \$48,400. High salaries are also found in Information (\$41,200) and Manufacturing (\$40,000).



From 2010-2011, the three industries with the fastest growing salaries were Information (14.7%), Financial Activities (6.1%), and Professional Services (3.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

STANLY COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
4529	Other General Merchandise St...	804
7222	Limited-Service Eating Places	763
7221	Full-Service Restaurants	752
6221	General Medical and Surgical...	733
3262	Rubber Product Manufacturing	549
4451	Grocery Stores	437
6231	Nursing Care Facilities	405
6244	Child Day Care Services	325
6233	Community Care Facilities fo...	310
4471	Gasoline Stations	281
6216	Home Health Care Services	277
5221	Depository Credit Intermedia...	266
6211	Offices of Physicians	263
3219	Other Wood Product Manufactu...	246
4441	Building Material and Suppli...	241

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
6221	General Medical and Surgical...	433
4529	Other General Merchandise St...	355
6216	Home Health Care Services	106
7222	Limited-Service Eating Places	92
6241	Individual and Family Services	91
5511	Management of Companies and ...	65
3339	Other General Purpose Machin...	65
5242	Agencies, Brokerages, and Ot...	59
4421	Furniture Stores	57
6116	Other Schools and Instructio...	54
3359	Other Electrical Equipment a...	52
3279	Other Nonmetallic Mineral Pr...	48
5614	Business Support Services	47
6111	Elementary and Secondary Sch...	45
3312	Steel Product Manufacturing ...	44

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
4529	Other General Merchandise St...	273
6221	General Medical and Surgical...	172
2389	Other Specialty Trade Contra...	78
6241	Individual and Family Services	72
6231	Nursing Care Facilities	71
6242	Community Food and Housing, ...	70
6216	Home Health Care Services	69
3359	Other Electrical Equipment a...	53
8111	Automotive Repair and Mainte...	48
4421	Furniture Stores	45
6211	Offices of Physicians	45
8134	Civic and Social Organizations	41
5511	Management of Companies and ...	40
5242	Agencies, Brokerages, and Ot...	39
4441	Building Material and Suppli...	36

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3262	Rubber Product Manufacturing	34.5
3141	Textile Furnishings Mills	29.4
3131	Fiber, Yarn, and Thread Mills	23.8
3133	Textile and Fabric Finishing...	16.5
3219	Other Wood Product Manufactu...	9.9
3212	Veneer, Plywood, and Enginee...	8.2
3312	Steel Product Manufacturing ...	8.0
3359	Other Electrical Equipment a...	7.6
6242	Community Food and Housing, ...	5.0
3372	Office Furniture (including ...	4.4
4233	Lumber and Other Constructio...	3.7
4529	Other General Merchandise St...	3.7
4412	Other Motor Vehicle Dealers	3.7
3371	Household and Institutional ...	3.7
1120	Animal Production	3.5

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
6111	Elementary and Secondary Sch...	900%
3312	Steel Product Manufacturing ...	259%
4421	Furniture Stores	228%
6116	Other Schools and Instructio...	208%
3339	Other General Purpose Machin...	197%
5614	Business Support Services	168%
6221	General Medical and Surgical...	144%
6213	Offices of Other Health Prac...	112%
5619	Other Support Services	93%
4412	Other Motor Vehicle Dealers	81%
4529	Other General Merchandise St...	79%
5242	Agencies, Brokerages, and Ot...	77%
6241	Individual and Family Services	76%
3359	Other Electrical Equipment a...	73%
4511	Sporting Goods, Hobby, and M...	63%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3363	Motor Vehicle Parts Manufact...	70%
6242	Community Food and Housing, ...	69%
4421	Furniture Stores	55%
4412	Other Motor Vehicle Dealers	45%
3359	Other Electrical Equipment a...	43%
6213	Offices of Other Health Prac...	40%
2389	Other Specialty Trade Contra...	39%
5619	Other Support Services	39%
6111	Elementary and Secondary Sch...	38%
6241	Individual and Family Services	34%
4529	Other General Merchandise St...	34%
6116	Other Schools and Instructio...	33%
2362	Nonresidential Building Cons...	32%
8111	Automotive Repair and Mainte...	30%
5242	Agencies, Brokerages, and Ot...	29%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

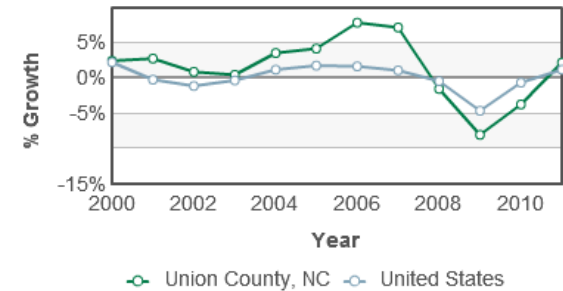
Key Statistics, 2011: Union County, NC

Employment Base:	52,000
Payroll Base:	\$1.9 B
Job Growth Rate:	2.2%
Payroll Growth Rate:	4.1%
Total Unemployed:	9,200
Unemployment Rate:	9.3%
Average Salary:	\$35,900

Percentage Growth: Union County job growth has outperformed the US over the past decade, but had a larger downturn during the recession. The county has rebounded faster than the US, reaching a 2.2% growth rate in 2011.

UNION COUNTY, NC

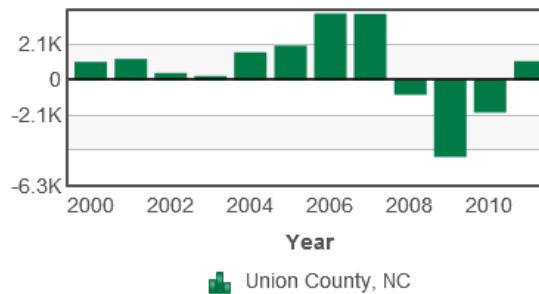
Annual Growth Rate, Employment, All Industries, 2000-2011
Union County, NC vs. U.S.



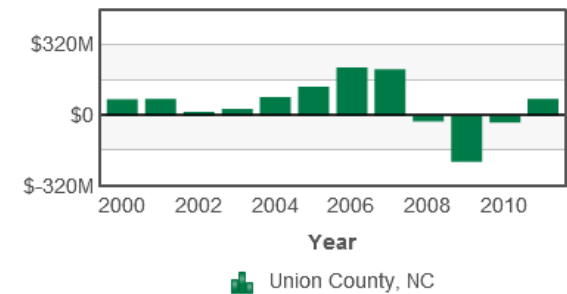
Net New Employment: During the recession, the county lost 6,500 jobs with most losses occurring in 2009. Job creation turned positive in 2011, with 1,100 created.

Net New Payroll: The county's payroll base declined by \$211 million in 2009 and didn't turn positive until 2011. Last year in 2011, the county's payroll grew by \$75.9 million.

Net New Employment, All Industries, 2000-2011
Union County, NC



Net New Payroll, All Industries, 2000-2011
Union County, NC



Industry Composition

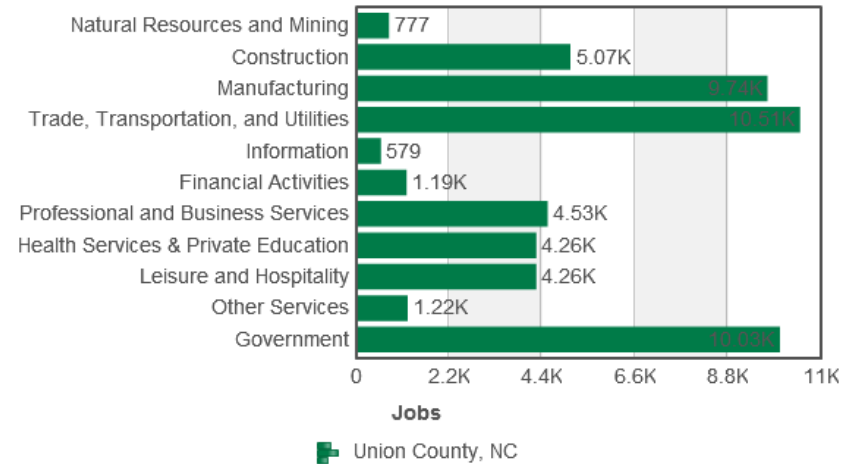
UNION COUNTY, NC

Top 3 Private Industries: Union County's three largest industries are Trade, Transportation and Utilities (10,500 jobs), Manufacturing (9,700), and Construction (5,100).

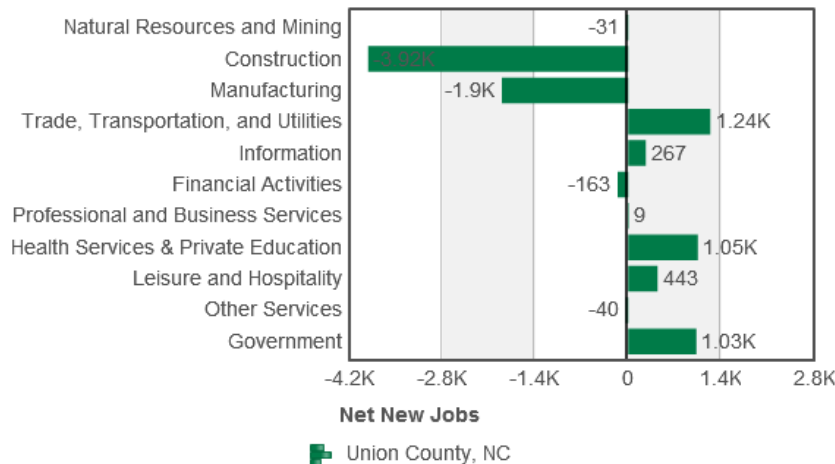
Net New Jobs: The only of these industries to gain jobs from 2006-2011 was Trade, Transportation and Utilities (1,240). While a majority of industries gained jobs, both Construction (-3,900) and Manufacturing (-1,900) lost jobs.

Percentage Growth: Information grew 85.6%, while US growth in the industry was -12%. Other industries with growth were Health Services (32.8%) and Trade (13.4%).

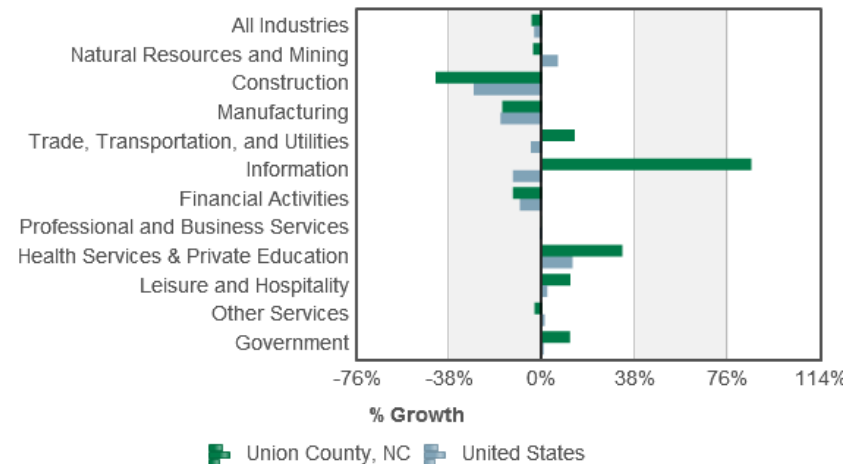
Employment by Industry, 2011
Union County, NC



New Jobs, 2006-2011
Union County, NC

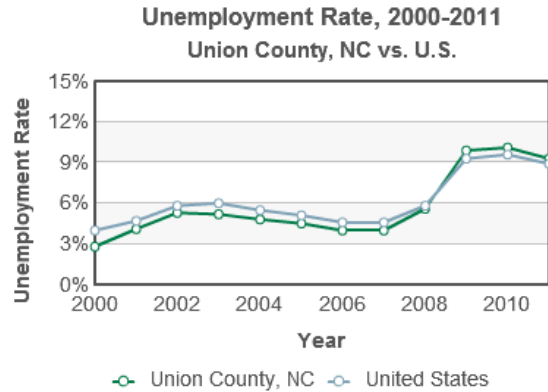


% Growth, Employment, 2006-2011
Union County, NC vs. U.S.

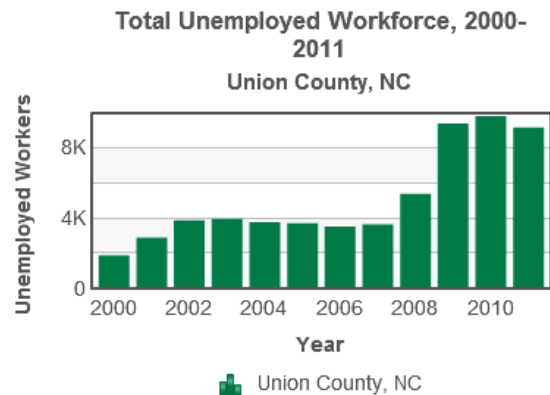


Workforce Conditions

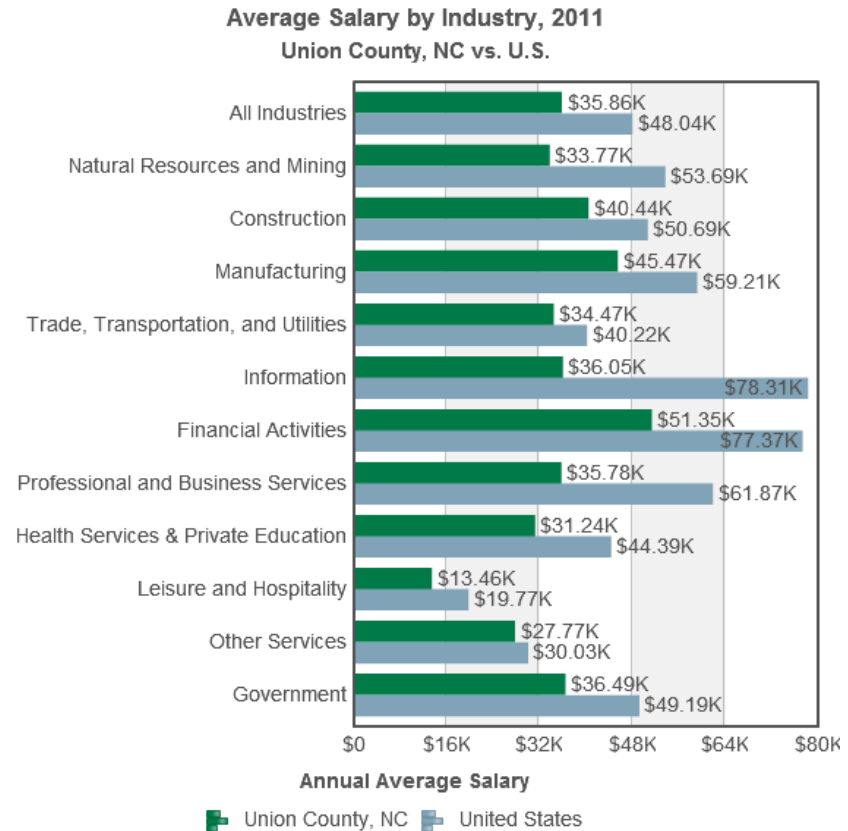
UNION COUNTY, NC



Unemployment: The unemployment rate in Union County, now 9.3%, has been consistently lower than the US throughout the past decade. The number of unemployed workers in the county grew from 3,500 in 2006 to a peak of 9,800 in 2010 and has since declined.



Average Salary by Industry: Union County's average salary reached \$35,900 in 2011. The county's highest average salary is in in Financial Activities, \$51,400. High salaries are also found in Manufacturing (\$45,400) and Construction (\$40,400).



From 2010-2011, the three industries with the fastest growing salaries were Financial Activities (14.3%), Information (6.0%), and Manufacturing (4.5%).

Top 15 Private Sector Industries by 4-Digit NAICS

UNION COUNTY, NC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7222	Limited-Service Eating Places	2,299
5617	Services to Buildings and Dw...	1,750
3116	Animal Slaughtering and Proc...	1,742
2382	Building Equipment Contractors	1,706
7221	Full-Service Restaurants	1,328
3314	Nonferrous Metal (except Alu...	1,226
4451	Grocery Stores	1,113
2381	Foundation, Structure, and B...	1,064
4529	Other General Merchandise St...	1,052
3261	Plastics Product Manufacturing	977
6231	Nursing Care Facilities	697
3391	Medical Equipment and Suppli...	679
2383	Building Finishing Contractors	627
4441	Building Material and Suppli...	618
4521	Department Stores	580

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
7222	Limited-Service Eating Places	385
5171	Wired Telecommunications Car...	261
6111	Elementary and Secondary Sch...	228
6231	Nursing Care Facilities	160
5416	Management, Scientific, and ...	155
4521	Department Stores	146
5617	Services to Buildings and Dw...	116
3314	Nonferrous Metal (except Alu...	113
6233	Community Care Facilities fo...	108
4529	Other General Merchandise St...	104
4461	Health and Personal Care Sto...	96
6216	Home Health Care Services	96
6212	Offices of Dentists	95
6213	Offices of Other Health Prac...	88
3363	Motor Vehicle Parts Manufact...	88

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
5617	Services to Buildings and Dw...	643
4529	Other General Merchandise St...	212
2373	Highway, Street, and Bridge ...	207
7222	Limited-Service Eating Places	200
2382	Building Equipment Contractors	178
5171	Wired Telecommunications Car...	170
6231	Nursing Care Facilities	157
8111	Automotive Repair and Mainte...	145
4244	Grocery and Related Product ...	141
4441	Building Material and Suppli...	124
6244	Child Day Care Services	123
6216	Home Health Care Services	119
3363	Motor Vehicle Parts Manufact...	118
2383	Building Finishing Contractors	117
5416	Management, Scientific, and ...	109

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
4243	Apparel, Piece Goods, and No...	107.8
7223	Special Food Services	95.2
3332	Industrial Machinery Manufac...	65.7
3363	Motor Vehicle Parts Manufact...	58.7
4471	Gasoline Stations	53.7
3371	Household and Institutional ...	39.2
1120	Animal Production	37.4
4461	Health and Personal Care Sto...	30.2
7211	Traveler Accommodation	27.1
4841	General Freight Trucking	21.0
7221	Full-Service Restaurants	18.0
4842	Specialized Freight Trucking	11.9
4921	Couriers and Express Deliver...	10.9
4931	Warehousing and Storage	10.3
4244	Grocery and Related Product ...	8.0

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
5171	Wired Telecommunications Car...	458%
6111	Elementary and Secondary Sch...	422%
3363	Motor Vehicle Parts Manufact...	121%
4247	Petroleum and Petroleum Prod...	120%
5416	Management, Scientific, and ...	115%
1151	Support Activities for Crop ...	104%
6213	Offices of Other Health Prac...	64%
7223	Special Food Services	61%
4921	Couriers and Express Deliver...	58%
6233	Community Care Facilities fo...	53%
6212	Offices of Dentists	51%
8129	Other Personal Services	49%
5611	Office Administrative Services	44%
5419	Other Professional, Scientif...	42%
3339	Other General Purpose Machin...	37%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3363	Motor Vehicle Parts Manufact...	73%
3359	Other Electrical Equipment a...	62%
2373	Highway, Street, and Bridge ...	57%
5171	Wired Telecommunications Car...	53%
5611	Office Administrative Services	49%
4244	Grocery and Related Product ...	47%
4247	Petroleum and Petroleum Prod...	41%
5619	Other Support Services	39%
6212	Offices of Dentists	39%
6241	Individual and Family Services	38%
5416	Management, Scientific, and ...	38%
6213	Offices of Other Health Prac...	37%
5617	Services to Buildings and Dw...	37%
6216	Home Health Care Services	33%
1110	Crop Production	32%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 100 jobs.

Employment Growth Trend

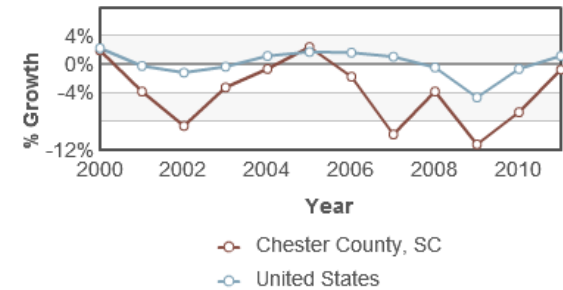
Key Statistics, 2011: Chester County, SC

Employment Base:	7,700
Payroll Base:	\$275 M
Job Growth Rate:	-0.7%
Payroll Growth Rate:	2.5%
Total Unemployed:	2,370
Unemployment Rate:	16%
Average Salary:	\$35,800

Percentage Growth: Chester County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county continued to lose jobs as the US recovery slowly began, with county employment declining -0.7% from 2010 to 2011.

CHESTER COUNTY, SC

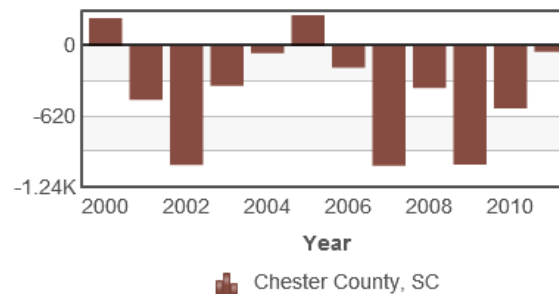
Annual Growth Rate, Employment, All Industries, 2000-2011
Chester County, SC vs. U.S.



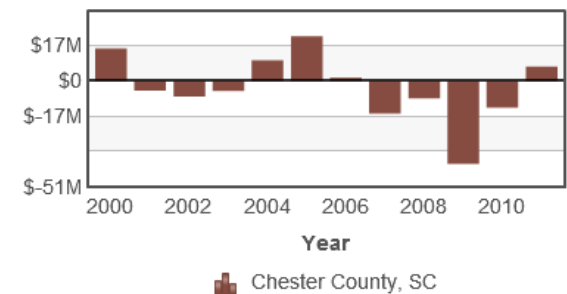
Net New Employment: During the recession, the county lost 1,600 jobs with most losses occurring in 2009. Job creation remained negative in 2011, with 50 lost.

Net New Payroll: The county's payroll base declined by \$40 million in 2009 and didn't turn positive until 2011. Last year in 2011, the county's payroll grew by \$6.9 million.

Net New Employment, All Industries, 2000-2011
Chester County, SC



Net New Payroll, All Industries, 2000-2011
Chester County, SC



Industry Composition

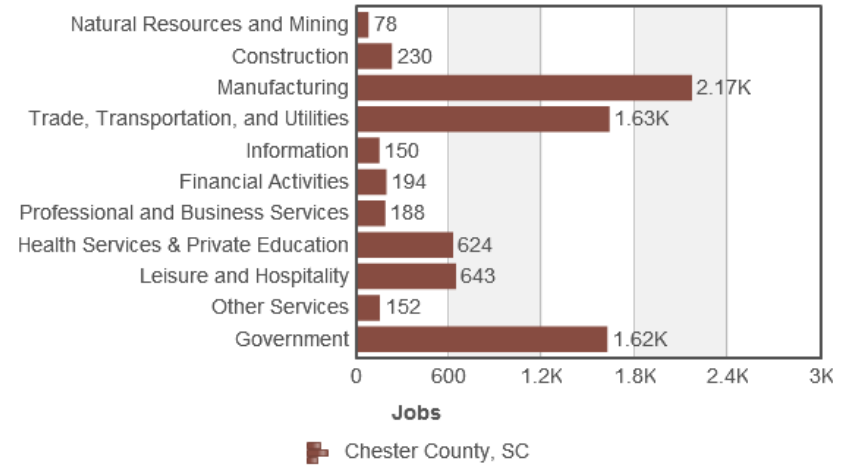
CHESTER COUNTY, SC

Top 3 Private Industries: Chester County's three largest industries are Manufacturing (2,200 jobs); Trade, Transportation and Utilities (1,600); and Leisure and Hospitality (640).

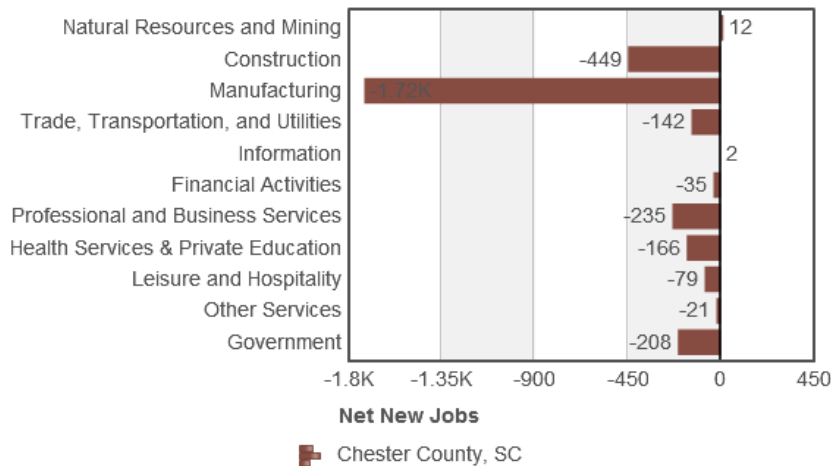
Net New Jobs: The county's largest industries lost jobs from 2006-2011: Manufacturing (-1,700); Trade (-140); and Leisure (-79). Only two industries created new jobs: Natural Resources (12) and Information (2).

Percentage Growth: Natural Resources and Mining grew 18% from 2006-2011, more than three times the US growth rate. Information was the only other industry with positive growth during that period, with 1% growth.

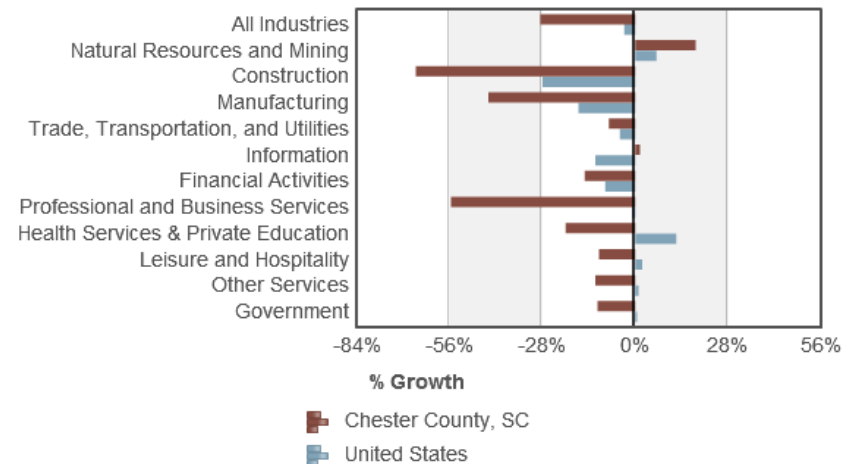
Employment by Industry, 2011
Chester County, SC



New Jobs, 2006-2011
Chester County, SC



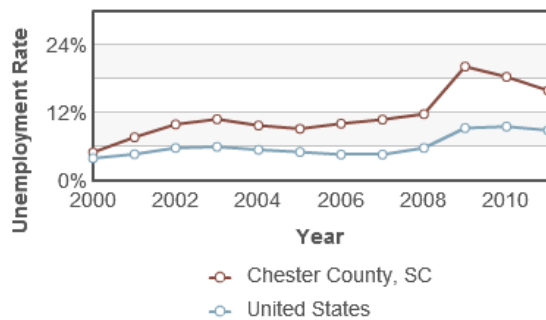
% Growth, Employment, 2006-2011
Chester County, SC vs. U.S.



Workforce Conditions

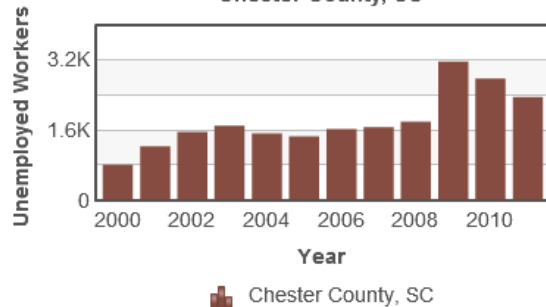
CHESTER COUNTY, SC

Unemployment Rate, 2000-2011
Chester County, SC vs. U.S.



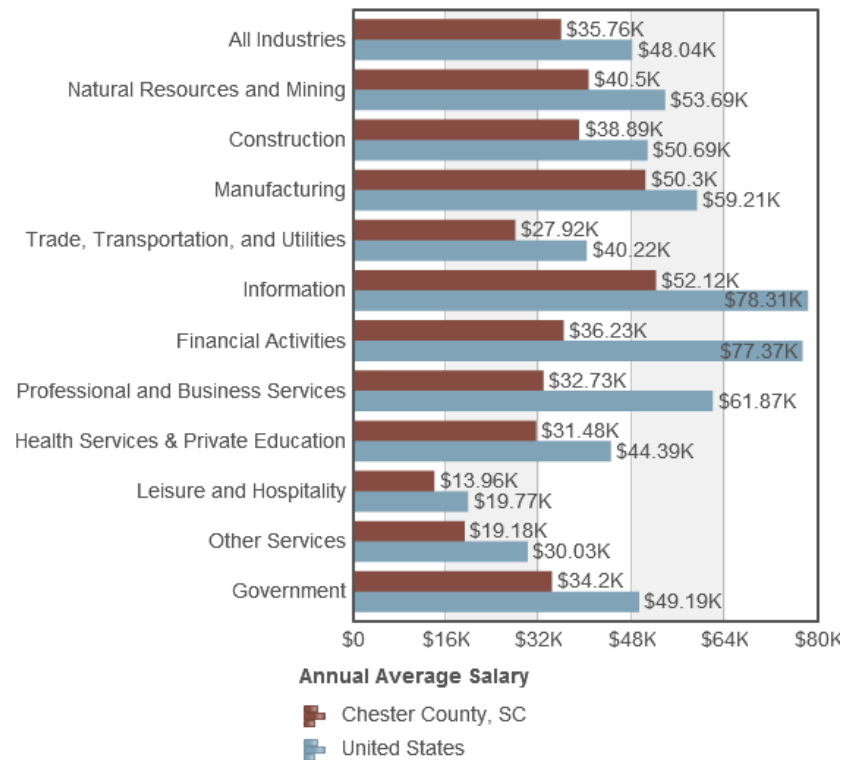
Unemployment: The unemployment rate in Chester County, now 16%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 1,470 in 2005 to a peak of 3,200 in 2009 and has since declined.

Total Unemployed Workforce, 2000-2011
Chester County, SC



Average Salary by Industry: Chester County's average salary reached \$35,800 in 2011. The Information industry had the county's highest average salary, \$52,100. High salaries are also found in Manufacturing (\$50,300) and Natural Resources and Mining (\$40,500).

Average Salary by Industry, 2011
Chester County, SC vs. U.S.



From 2010-2011, the three industries with the fastest growing salaries were Professional Services (11.9%), Other Services (7.9%), and Manufacturing (6.9%).

Top 15 Private Sector Industries by 4-Digit NAICS

CHESTER COUNTY, SC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
3272	Glass and Glass Product Manu...	495
7222	Limited-Service Eating Places	373
3314	Nonferrous Metal (except Alu...	352
6221	General Medical and Surgical...	312
4841	General Freight Trucking	285
4451	Grocery Stores	284
4244	Grocery and Related Product ...	263
3211	Sawmills and Wood Preservation	240
3279	Other Nonmetallic Mineral Pr...	238
7221	Full-Service Restaurants	205
4529	Other General Merchandise St...	189
3222	Converted Paper Product Manu...	146
4471	Gasoline Stations	136
3321	Forging and Stamping	122
5179	Other Telecommunications	113

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
4841	General Freight Trucking	183
3211	Sawmills and Wood Preservation	60
3253	Pesticide, Fertilizer, and O...	60
6223	Specialty (except Psychiatri...	48
3261	Plastics Product Manufacturing	47
6216	Home Health Care Services	43
2379	Other Heavy and Civil Engine...	35
3321	Forging and Stamping	29
4481	Clothing Stores	29
3329	Other Fabricated Metal Produ...	29
8141	Private Households	28
1133	Logging	26
6241	Individual and Family Services	23
4529	Other General Merchandise St...	22
3328	Coating, Engraving, Heat Tre...	18

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
4841	General Freight Trucking	96
6221	General Medical and Surgical...	93
3273	Cement and Concrete Product ...	47
4481	Clothing Stores	44
3328	Coating, Engraving, Heat Tre...	24
3253	Pesticide, Fertilizer, and O...	20
4244	Grocery and Related Product ...	20
7222	Limited-Service Eating Places	20
8141	Private Households	19
3329	Other Fabricated Metal Produ...	17
3279	Other Nonmetallic Mineral Pr...	17
4249	Miscellaneous Nondurable Goo...	14
2379	Other Heavy and Civil Engine...	13
5221	Depository Credit Intermedia...	10
2381	Foundation, Structure, and B...	10

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3272	Glass and Glass Product Manu...	113.8
3314	Nonferrous Metal (except Alu...	100.5
3279	Other Nonmetallic Mineral Pr...	61.9
3211	Sawmills and Wood Preservation	52.1
3253	Pesticide, Fertilizer, and O...	39.5
1133	Logging	28.6
3321	Forging and Stamping	23.1
3252	Resin, Synthetic Rubber, and...	19.0
5179	Other Telecommunications	18.0
3222	Converted Paper Product Manu...	9.1
4244	Grocery and Related Product ...	6.1
4841	General Freight Trucking	5.4
3273	Cement and Concrete Product ...	5.1
3323	Architectural and Structural...	3.7
4249	Miscellaneous Nondurable Goo...	3.6

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3261	Plastics Product Manufacturing	940%
3253	Pesticide, Fertilizer, and O...	250%
4841	General Freight Trucking	179%
8141	Private Households	122%
4481	Clothing Stores	76%
1133	Logging	50%
3211	Sawmills and Wood Preservation	33%
3321	Forging and Stamping	31%
3273	Cement and Concrete Product ...	19%
4529	Other General Merchandise St...	13%
5179	Other Telecommunications	8%
5221	Depository Credit Intermedia...	6%
4244	Grocery and Related Product ...	2%
3279	Other Nonmetallic Mineral Pr...	-2%
4451	Grocery Stores	-2%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3273	Cement and Concrete Product ...	94%
4481	Clothing Stores	66%
8141	Private Households	37%
4841	General Freight Trucking	34%
6221	General Medical and Surgical...	30%
3253	Pesticide, Fertilizer, and O...	24%
4249	Miscellaneous Nondurable Goo...	21%
3261	Plastics Product Manufacturing	12%
5221	Depository Credit Intermedia...	10%
6211	Offices of Physicians	9%
4244	Grocery and Related Product ...	8%
3279	Other Nonmetallic Mineral Pr...	7%
7222	Limited-Service Eating Places	5%
4471	Gasoline Stations	4%
7221	Full-Service Restaurants	3%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

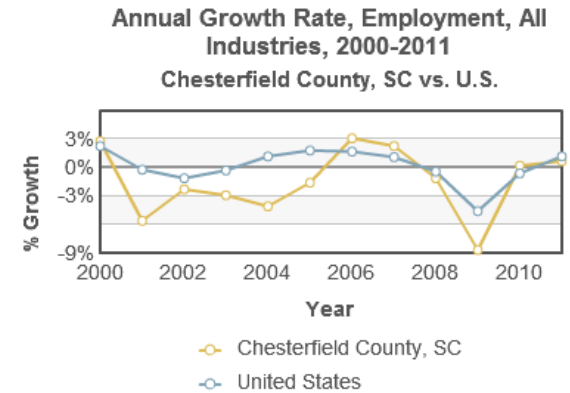
Employment Growth Trend

Key Statistics, 2011: Chesterfield County, SC

Employment Base:	13,100
Payroll Base:	\$422 M
Job Growth Rate:	0.7%
Payroll Growth Rate:	3.5%
Total Unemployed:	2,580
Unemployment Rate:	13.6%
Average Salary:	\$32,300

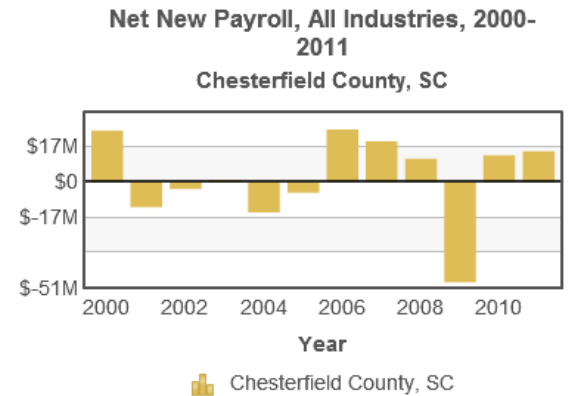
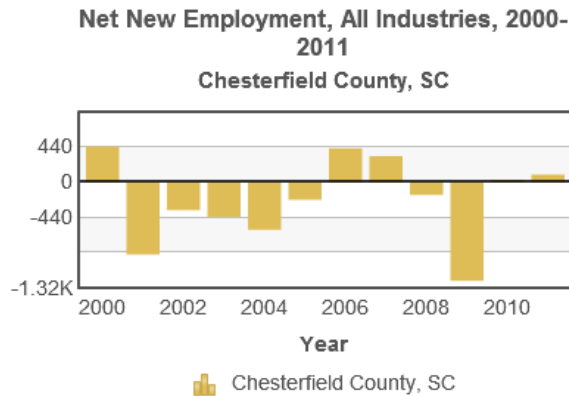
Percentage Growth: Chesterfield County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded slightly slower than the US, reaching a 0.7% growth rate in 2011.

CHESTERFIELD COUNTY, SC



Net New Employment: During the recession, the county lost 1,200 jobs with all losses occurring in 2009. Job creation turned positive in 2010, and 93 were created in 2011.

Net New Payroll: The county's payroll base declined by \$48 million in 2009 but turned positive in 2010, the same year as job growth turned positive. Last year in 2011, the county's payroll grew by \$14.8 million.



Industry Composition

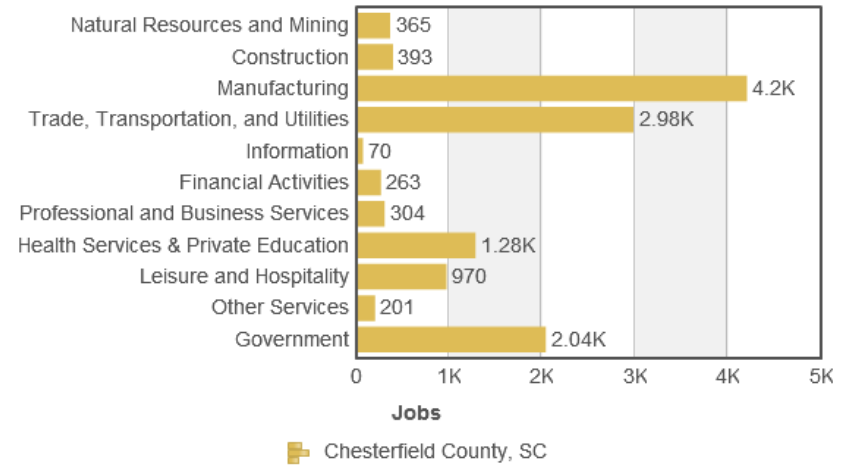
CHESTERFIELD COUNTY, SC

Top 3 Private Industries: Chesterfield County's three largest industries are Manufacturing (4,200 jobs), Trade, Transportation and Utilities (3,000), and Health Services (1,300).

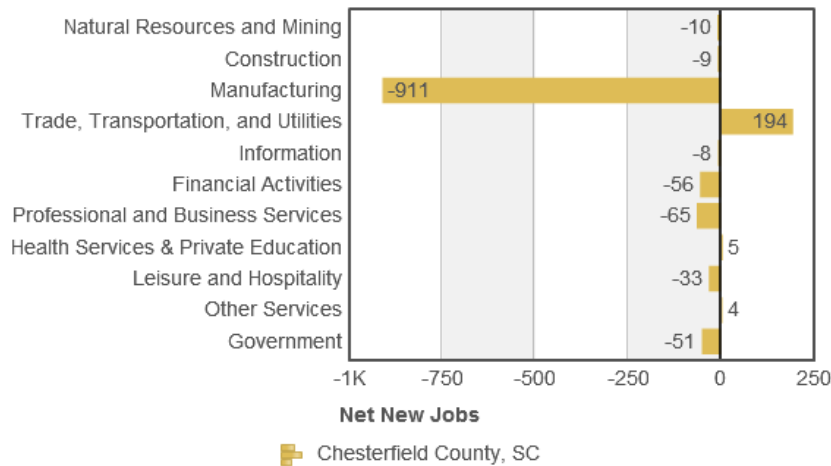
Net New Jobs: Of the county's largest industries, only Manufacturing lost jobs from 2006-2011 (-910). During that period, Trade, Transportation and Utilities gained 910 jobs while Health Services gained 5.

Percentage Growth: Over the period 2006-2011, only three industries had positive percentage growth: Trade (7%), Other Services (2%) and Health Services (0.4%).

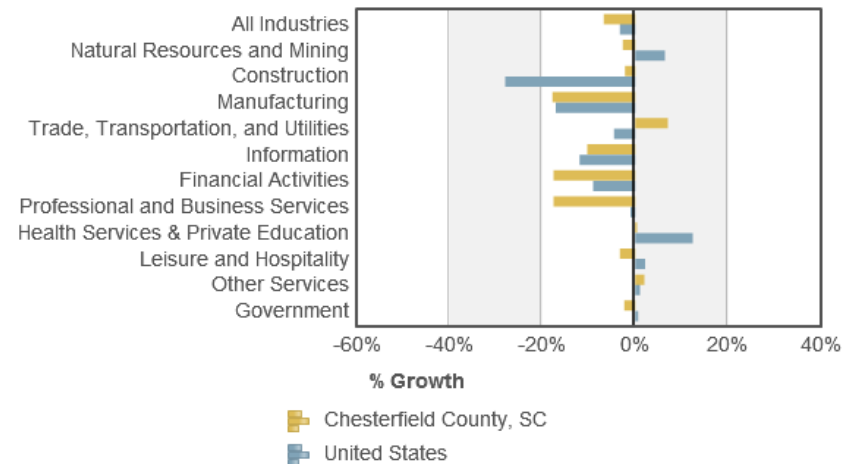
Employment by Industry, 2011
Chesterfield County, SC



New Jobs, 2006-2011
Chesterfield County, SC

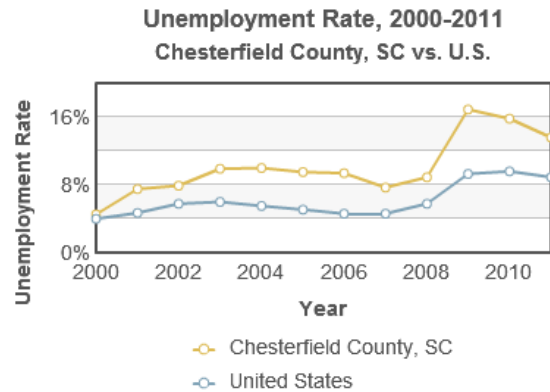


% Growth, Employment, 2006-2011
Chesterfield County, SC vs. U.S.

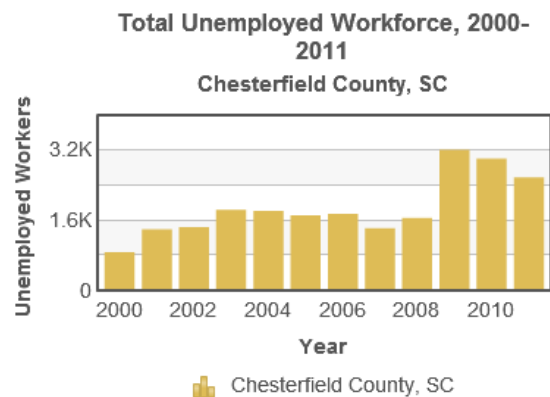


Workforce Conditions

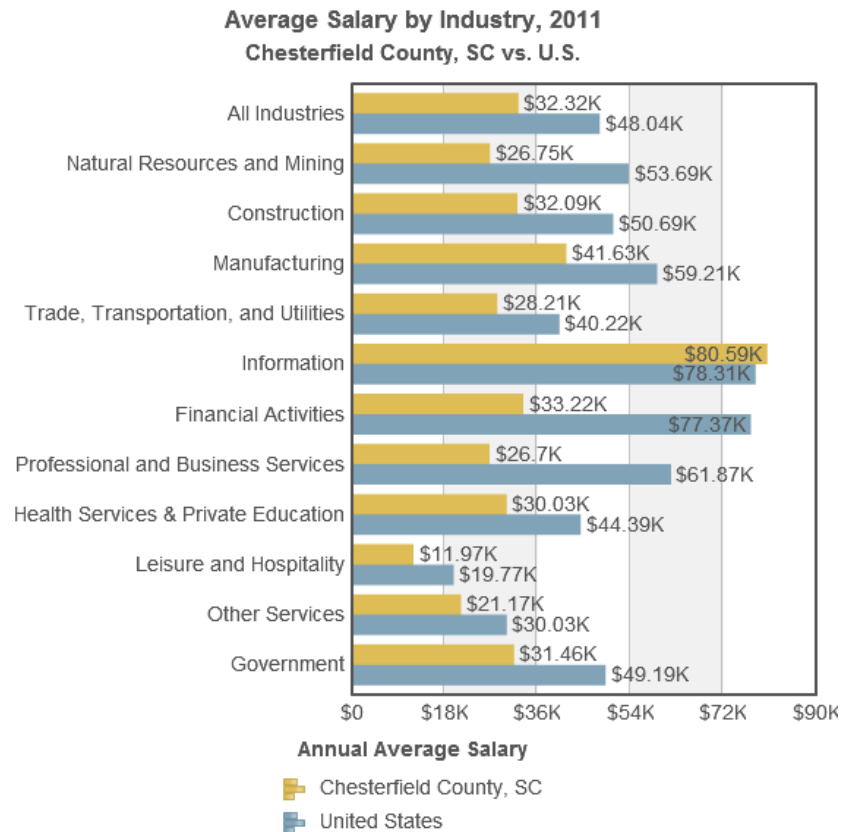
CHESTERFIELD COUNTY, SC



Unemployment: The unemployment rate in Chesterfield County, now 13.6%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 1,400 in 2007 to a peak of 3,200 in 2009 and has since declined.



Average Salary by Industry: Chesterfield County's average salary reached \$32,300 in 2011. The county's highest average salary is in the Information industry, \$80,600. High salaries are also found in Manufacturing (\$41,600) and Financial Activities (\$33,200).



From 2010-2011, the three industries with the fastest growing salaries were Information (36.5%), Natural Resources and Mining (11.4%), and Construction (4.5%).

Top 15 Private Sector Industries by 4-Digit NAICS

CHESTERFIELD COUNTY, SC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
3329	Other Fabricated Metal Produ...	1,688
4931	Warehousing and Storage	932
7222	Limited-Service Eating Places	630
4529	Other General Merchandise St...	391
3132	Fabric Mills	352
4451	Grocery Stores	320
6232	Residential Mental Retardati...	281
7221	Full-Service Restaurants	263
3211	Sawmills and Wood Preservation	255
6221	General Medical and Surgical...	244
3352	Household Appliance Manufact...	221
3121	Beverage Manufacturing	193
2382	Building Equipment Contractors	193
3324	Boiler, Tank, and Shipping C...	191
3391	Medical Equipment and Suppli...	188

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
6241	Individual and Family Services	136
3364	Aerospace Product and Parts ...	132
4931	Warehousing and Storage	98
4529	Other General Merchandise St...	97
4452	Specialty Food Stores	82
1110	Crop Production	54
3371	Household and Institutional ...	53
3391	Medical Equipment and Suppli...	41
4471	Gasoline Stations	41
2382	Building Equipment Contractors	35
4453	Beer, Wine, and Liquor Stores	35
5612	Facilities Support Services	34
4247	Petroleum and Petroleum Prod...	28
4234	Professional and Commercial ...	25
4461	Health and Personal Care Sto...	23

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
4931	Warehousing and Storage	158
2382	Building Equipment Contractors	86
6241	Individual and Family Services	70
3364	Aerospace Product and Parts ...	65
3371	Household and Institutional ...	55
6232	Residential Mental Retardati...	55
5617	Services to Buildings and Dw...	49
3324	Boiler, Tank, and Shipping C...	43
4471	Gasoline Stations	41
3273	Cement and Concrete Product ...	35
4461	Health and Personal Care Sto...	30
7222	Limited-Service Eating Places	25
4452	Specialty Food Stores	23
4543	Direct Selling Establishments	23
5171	Wired Telecommunications Car...	21

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3132	Fabric Mills	74.7
3329	Other Fabricated Metal Produ...	68.5
3352	Household Appliance Manufact...	41.1
3322	Cutlery and Handtool Manufac...	33.6
3211	Sawmills and Wood Preservation	32.8
3131	Fiber, Yarn, and Thread Mills	24.5
3324	Boiler, Tank, and Shipping C...	22.2
3312	Steel Product Manufacturing ...	18.9
4931	Warehousing and Storage	14.4
2123	Nonmetallic Mineral Mining a...	12.1
3121	Beverage Manufacturing	11.2
4442	Lawn and Garden Equipment an...	7.4
3391	Medical Equipment and Suppli...	6.1
3152	Cut and Sew Apparel Manufact...	5.8
4543	Direct Selling Establishments	5.0

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
6241	Individual and Family Services	2720%
4452	Specialty Food Stores	1640%
3371	Household and Institutional ...	1060%
4453	Beer, Wine, and Liquor Stores	175%
8133	Social Advocacy Organizations	56%
5511	Management of Companies and ...	55%
4543	Direct Selling Establishments	54%
1110	Crop Production	52%
6216	Home Health Care Services	37%
4529	Other General Merchandise St...	33%
3273	Cement and Concrete Product ...	31%
4471	Gasoline Stations	30%
3391	Medical Equipment and Suppli...	28%
6233	Community Care Facilities fo...	26%
2382	Building Equipment Contractors	22%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3371	Household and Institutional ...	95%
3273	Cement and Concrete Product ...	56%
6241	Individual and Family Services	50%
3364	Aerospace Product and Parts ...	49%
2382	Building Equipment Contractors	45%
5617	Services to Buildings and Dw...	40%
4543	Direct Selling Establishments	37%
4453	Beer, Wine, and Liquor Stores	35%
5171	Wired Telecommunications Car...	34%
4452	Specialty Food Stores	26%
6233	Community Care Facilities fo...	26%
4461	Health and Personal Care Sto...	23%
4471	Gasoline Stations	23%
3324	Boiler, Tank, and Shipping C...	23%
6232	Residential Mental Retardati...	20%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

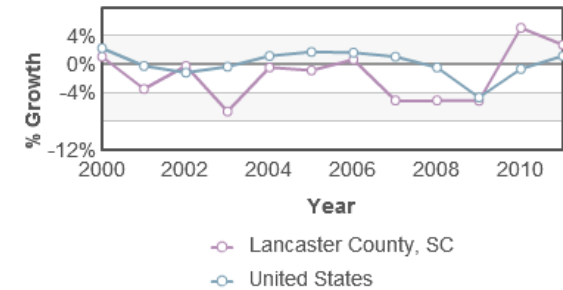
Key Statistics, 2011: Lancaster County, SC

Employment Base:	16,200
Payroll Base:	\$585 M
Job Growth Rate:	2.8%
Payroll Growth Rate:	6.9%
Total Unemployed:	4,300
Unemployment Rate:	13.9%
Average Salary:	\$36,100

Percentage Growth: Lancaster County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded much faster than the US, with employment growing 2.8% from 2010 to 2011.

LANCASTER COUNTY, SC

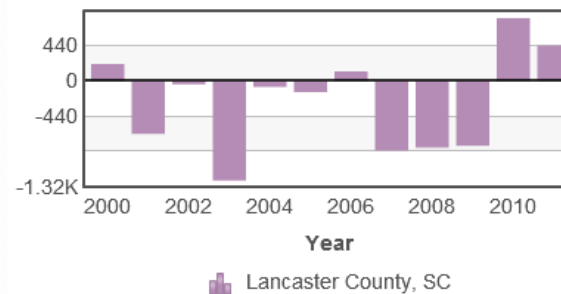
Annual Growth Rate, Employment, All Industries, 2000-2011
Lancaster County, SC vs. U.S.



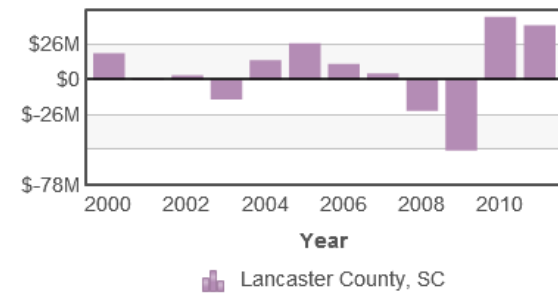
Net New Employment: During the recession, the county lost 22 jobs with all losses occurring in 2009. Job creation turned sharply positive in 2010, and 440 were created in 2011.

Net New Payroll: The county's payroll base declined by \$53 million in 2009 but turned positive in 2010, the same year job growth turned positive. Last year in 2011, the county's payroll grew by \$40 million.

Net New Employment, All Industries, 2000-2011
Lancaster County, SC



Net New Payroll, All Industries, 2000-2011
Lancaster County, SC



Industry Composition

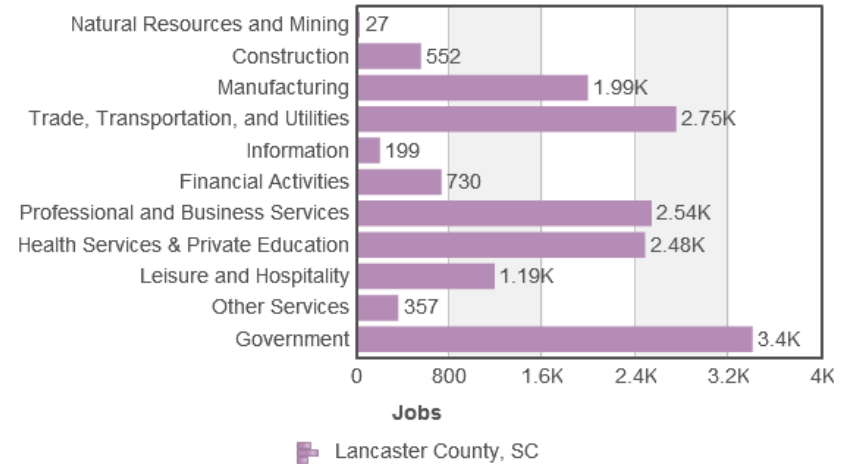
LANCASTER COUNTY, SC

Top 3 Private Industries: Lancaster County's three largest industries are Trade, Transportation and Utilities (2,700 jobs); Professional Services (2,500); and Health Services (2,480).

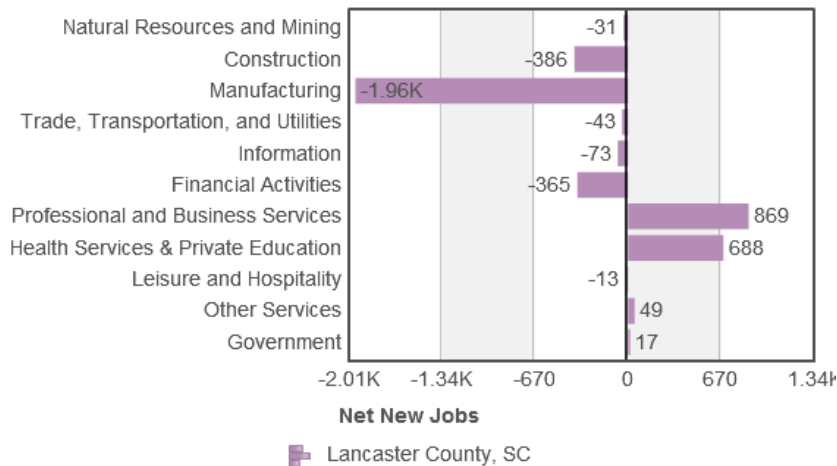
Net New Jobs: From 2006-2011, Trade was the only of these industries to lose jobs (-43). The other two industries had the most new jobs, Professional Services with 870 and Health Services with 690.

Percentage Growth: Professional Services grew 52% from 2006-2011, while the industry shrank -1% in the US. Health Services had the next highest growth rate, 38%.

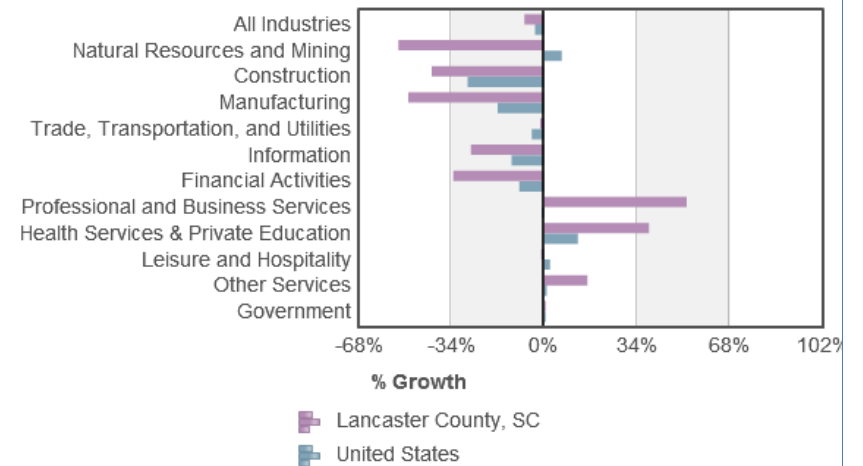
Employment by Industry, 2011
Lancaster County, SC



New Jobs, 2006-2011
Lancaster County, SC

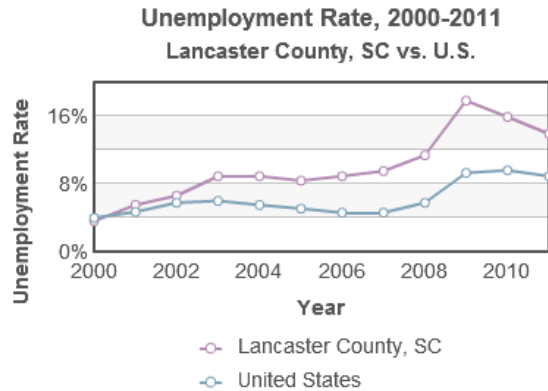


% Growth, Employment, 2006-2011
Lancaster County, SC vs. U.S.

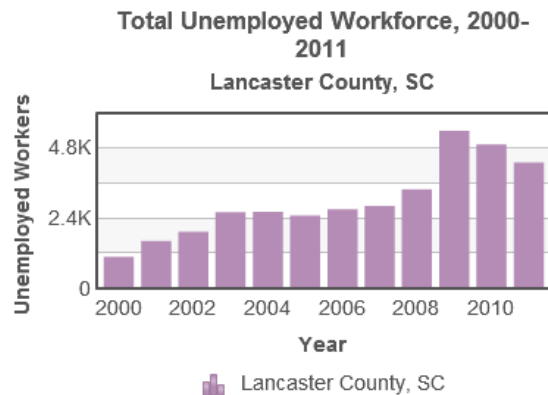


Workforce Conditions

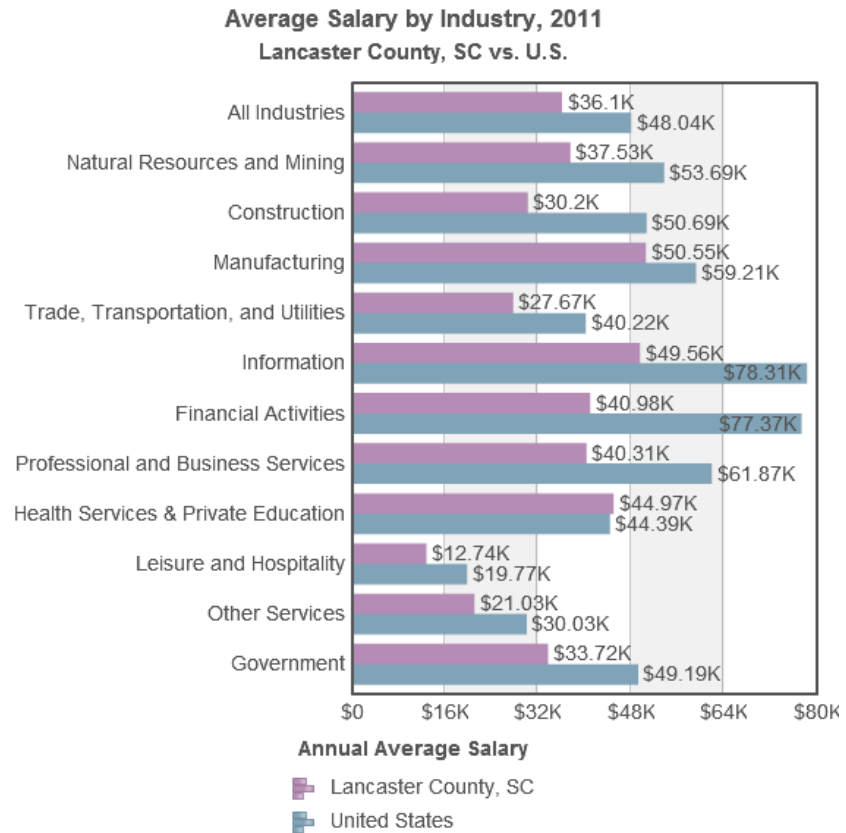
LANCASTER COUNTY, SC



Unemployment: The unemployment rate in Lancaster County, now 13.9%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 2,500 in 2005 to a peak of 5,400 in 2009 and has since declined.



Average Salary by Industry: Lancaster County's average salary reached \$36,100 in 2011. The Manufacturing industry has the county's highest average salary, \$50,500. High salaries are also found in Information (\$49,600) and Health Services (\$45,000).



From 2010-2011, the three industries with the fastest growing salaries were Information (20.8%); Natural Resources and Mining (16.7%); and Health Services (6.8%).

Top 15 Private Sector Industries by 4-Digit NAICS

LANCASTER COUNTY, SC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
6211	Offices of Physicians	776
6221	General Medical and Surgical...	708
5416	Management, Scientific, and ...	692
5617	Services to Buildings and Dw...	639
7222	Limited-Service Eating Places	551
4529	Other General Merchandise St...	527
7221	Full-Service Restaurants	402
3359	Other Electrical Equipment a...	396
6231	Nursing Care Facilities	373
4451	Grocery Stores	364
4441	Building Material and Suppli...	316
5241	Insurance Carriers	263
5221	Depository Credit Intermedia...	215
3132	Fabric Mills	191
6244	Child Day Care Services	185

MOST NEW JOBS, Past 5 Years

NAICS	Description
5416	Management, Scientific, and ...
6211	Offices of Physicians
5617	Services to Buildings and Dw...
3341	Computer and Peripheral Equi...
5221	Depository Credit Intermedia...
3119	Other Food Manufacturing
5418	Advertising, Public Relation...
5223	Activities Related to Credit...
6241	Individual and Family Services
6216	Home Health Care Services
4441	Building Material and Suppli...
6231	Nursing Care Facilities
5419	Other Professional, Scientif...
4451	Grocery Stores
4246	Chemical and Allied Products...

Net New Jobs 2007-2012

667
486
341
115
106
105
103
96
86
83
81
73
73
64
58

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
5416	Management, Scientific, and ...	236
6211	Offices of Physicians	156
6231	Nursing Care Facilities	75
6241	Individual and Family Services	71
3329	Other Fabricated Metal Produ...	60
3341	Computer and Peripheral Equi...	55
4441	Building Material and Suppli...	55
2381	Foundation, Structure, and B...	52
2362	Nonresidential Building Cons...	51
3119	Other Food Manufacturing	44
6216	Home Health Care Services	43
5419	Other Professional, Scientif...	42
5418	Advertising, Public Relation...	40
7221	Full-Service Restaurants	40
5223	Activities Related to Credit...	38

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3159	Apparel Accessories and Othe...	34.2
3132	Fabric Mills	32.5
3359	Other Electrical Equipment a...	27.0
3112	Grain and Oilseed Milling	10.5
3312	Steel Product Manufacturing ...	7.2
3119	Other Food Manufacturing	5.9
3341	Computer and Peripheral Equi...	5.9
3329	Other Fabricated Metal Produ...	5.6
5416	Management, Scientific, and ...	4.8
4246	Chemical and Allied Products...	4.2
3353	Electrical Equipment Manufac...	3.9
3399	Other Miscellaneous Manufac...	3.5
5223	Activities Related to Credit...	3.5
5611	Office Administrative Services	3.4
8122	Death Care Services	3.2

FASTEST % GROWTH, Past 5 Years

NAICS	Description
5416	Management, Scientific, and ...
6216	Home Health Care Services
4246	Chemical and Allied Products...
3312	Steel Product Manufacturing ...
5223	Activities Related to Credit...
3119	Other Food Manufacturing
5415	Computer Systems Design and ...
6211	Offices of Physicians
2211	Electric Power Generation, T...
5419	Other Professional, Scientif...
3112	Grain and Oilseed Milling
5617	Services to Buildings and Dw...
5221	Depository Credit Intermedia...
5313	Activities Related to Real E...
6241	Individual and Family Services

% Growth 2007-2012

2668%
1660%
1160%
900%
686%
618%
187%
168%
145%
143%
138%
114%
97%
97%
91%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
2362	Nonresidential Building Cons...	55%
6216	Home Health Care Services	49%
3341	Computer and Peripheral Equi...	48%
2381	Foundation, Structure, and B...	47%
3312	Steel Product Manufacturing ...	46%
8141	Private Households	42%
6241	Individual and Family Services	39%
5418	Advertising, Public Relation...	39%
3119	Other Food Manufacturing	36%
3329	Other Fabricated Metal Produ...	35%
5223	Activities Related to Credit...	35%
5416	Management, Scientific, and ...	34%
5419	Other Professional, Scientif...	34%
5151	Radio and Television Broadca...	31%
5415	Computer Systems Design and ...	30%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

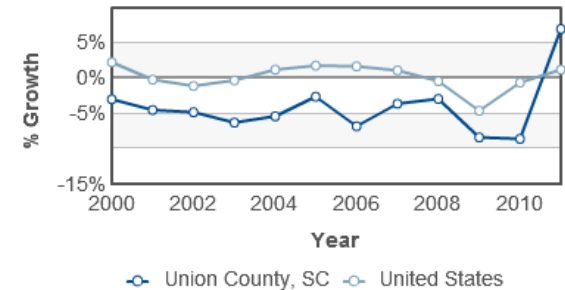
Key Statistics, 2011: Union County, SC

Employment Base:	6,300
Payroll Base:	\$198 M
Job Growth Rate:	7.0%
Payroll Growth Rate:	12.5%
Total Unemployed:	1,880
Unemployment Rate:	16.2%
Average Salary:	\$31,400

Percentage Growth: Union County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded much faster than the US, with employment growing 7% from 2010 to 2011.

UNION COUNTY, SC

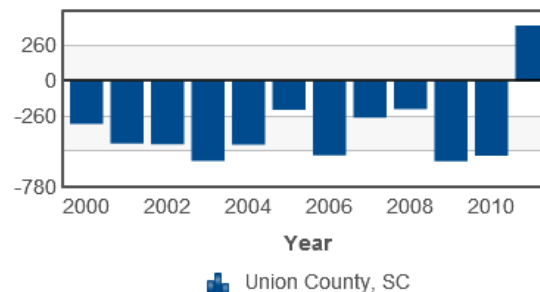
Annual Growth Rate, Employment, All Industries, 2000-2011
Union County, SC vs. U.S.



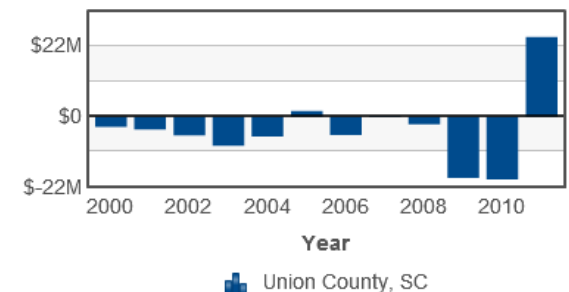
Net New Employment: During the recession, the county lost 1,100 jobs with half of all losses occurring in 2009. Job creation turned sharply positive in 2011, with 400 created.

Net New Payroll: The county's payroll base declined by \$19 million in 2009 and continued to shrink in 2010. In 2011, the county's payroll grew by \$24.9 million.

Net New Employment, All Industries, 2000-2011
Union County, SC



Net New Payroll, All Industries, 2000-2011
Union County, SC



Industry Composition

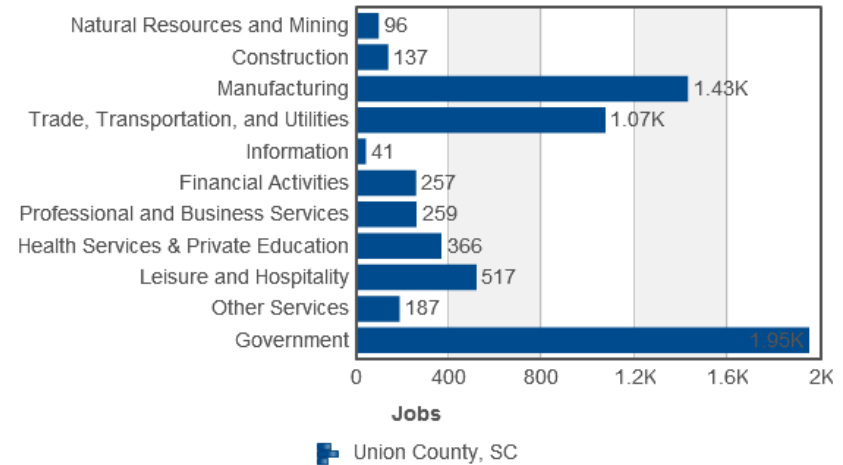
UNION COUNTY, SC

Top 3 Private Industries: Union County's three largest industries are Manufacturing (1,400 jobs); Trade, Transportation and Utilities (1,100); and Leisure and Hospitality (500).

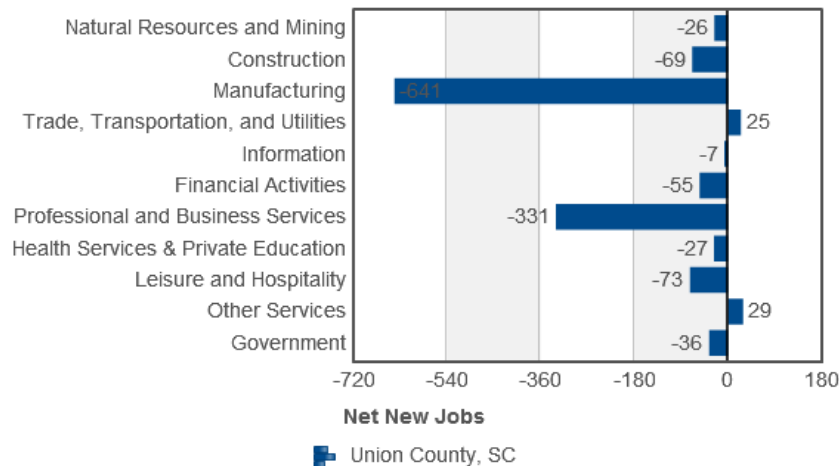
Net New Jobs: Two of these industries lost jobs from 2006-2011: Manufacturing (-640) and Leisure and Hospitality (-73). Only two industries created new jobs: Other Services (30) and Trade (25).

Percentage Growth: Beyond the small but fast-growing Other Services, Trade was the only other industry with positive growth during 2006-2011, with 2% growth.

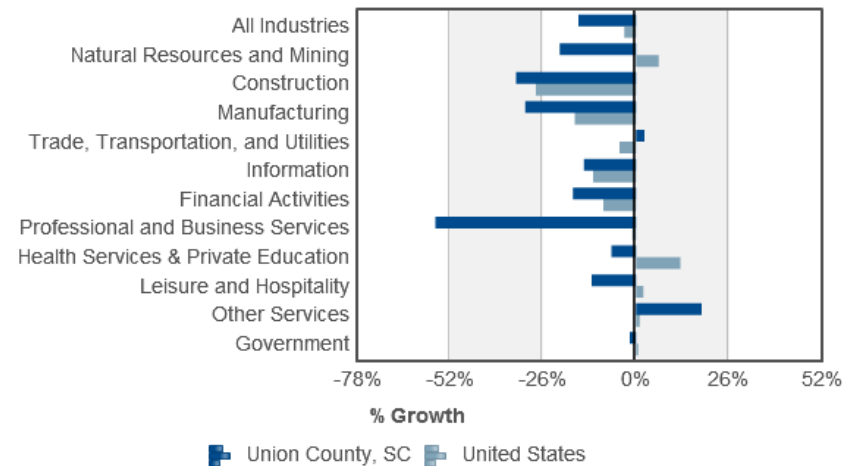
Employment by Industry, 2011
Union County, SC



New Jobs, 2006-2011
Union County, SC

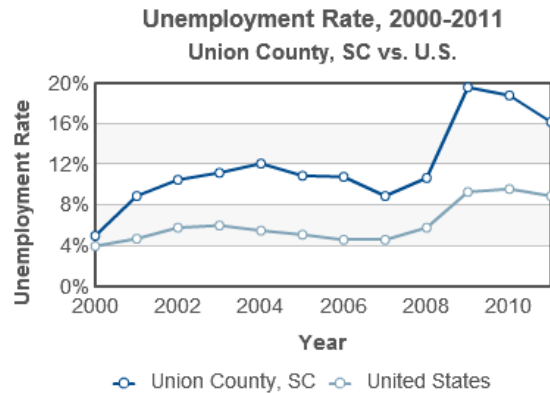


% Growth, Employment, 2006-2011
Union County, SC vs. U.S.

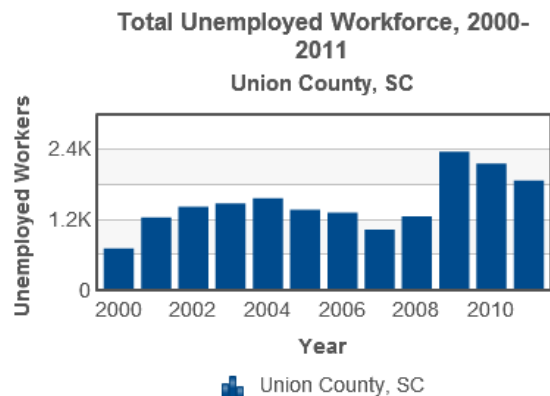


Workforce Conditions

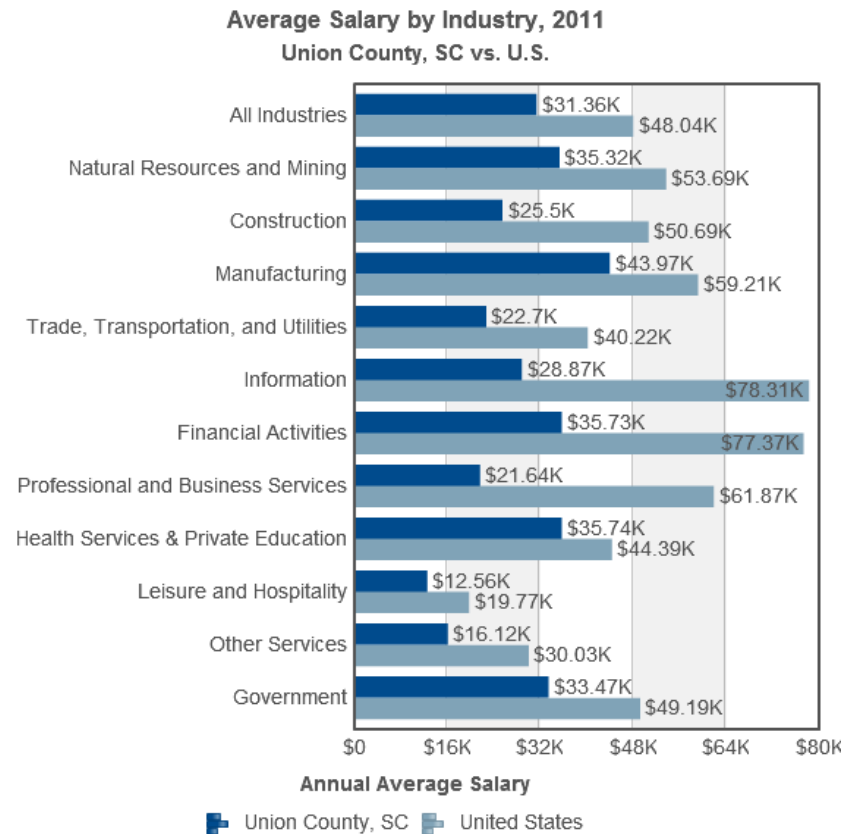
UNION COUNTY, SC



Unemployment: The unemployment rate in Union County, now 16.2%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 1,000 in 2007 to a peak of 2,400 in 2009 and has since declined.



Average Salary by Industry: Union County's average salary reached \$31,400 in 2011. The Manufacturing industry pays the county's highest average salary, \$44,000. High salaries are also found in Health Services (\$35,740) and Financial Activities (\$35,730).



From 2010-2011, the three industries with the fastest growing salaries were Manufacturing (9.3%); Trade, Transportation and Utilities (4.4%); and Health Services (3.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

UNION COUNTY, SC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
7222	Limited-Service Eating Places	292
4529	Other General Merchandise St...	215
3133	Textile and Fabric Finishing...	182
7221	Full-Service Restaurants	165
4471	Gasoline Stations	162
5221	Depository Credit Intermedia...	155
3261	Plastics Product Manufacturing	155
4451	Grocery Stores	151
3132	Fabric Mills	142
6231	Nursing Care Facilities	133
3362	Motor Vehicle Body and Trail...	125
6219	Other Ambulatory Health Care...	120
3131	Fiber, Yarn, and Thread Mills	106
5416	Management, Scientific, and ...	105
4521	Department Stores	102

MOST NEW JOBS, Past 5 Years

NAICS	Description	Net New Jobs 2007-2012
3362	Motor Vehicle Body and Trail...	120
6231	Nursing Care Facilities	116
7221	Full-Service Restaurants	92
3222	Converted Paper Product Manu...	79
4521	Department Stores	78
3261	Plastics Product Manufacturing	52
4471	Gasoline Stations	47
3273	Cement and Concrete Product ...	27
4529	Other General Merchandise St...	24
2389	Other Specialty Trade Contra...	19
8111	Automotive Repair and Mainte...	18
2361	Residential Building Constru...	14
6214	Outpatient Care Centers	14
5171	Wired Telecommunications Car...	13
4243	Apparel, Piece Goods, and No...	12

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Jobs 2012-2017
3362	Motor Vehicle Body and Trail...	66
5416	Management, Scientific, and ...	64
6231	Nursing Care Facilities	52
4471	Gasoline Stations	43
7221	Full-Service Restaurants	29
4521	Department Stores	27
2389	Other Specialty Trade Contra...	22
3273	Cement and Concrete Product ...	21
2361	Residential Building Constru...	18
6214	Outpatient Care Centers	17
8111	Automotive Repair and Mainte...	16
7212	RV (Recreational Vehicle) Pa...	16
4461	Health and Personal Care Sto...	14
6241	Individual and Family Services	12
6219	Other Ambulatory Health Care...	10

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3133	Textile and Fabric Finishing...	129.8
3131	Fiber, Yarn, and Thread Mills	95.4
3132	Fabric Mills	66.5
1133	Logging	39.7
3362	Motor Vehicle Body and Trail...	25.3
3321	Forging and Stamping	12.4
6219	Other Ambulatory Health Care...	10.0
3261	Plastics Product Manufacturing	7.0
3222	Converted Paper Product Manu...	6.8
4471	Gasoline Stations	4.4
4529	Other General Merchandise St...	3.0
5222	Nondepository Credit Interme...	2.3
2389	Other Specialty Trade Contra...	2.2
5416	Management, Scientific, and ...	2.0
5221	Depository Credit Intermedia...	2.0

FASTEST % GROWTH, Past 5 Years

NAICS	Description	% Growth 2007-2012
3362	Motor Vehicle Body and Trail...	2400%
3222	Converted Paper Product Manu...	1580%
6231	Nursing Care Facilities	682%
4521	Department Stores	325%
7221	Full-Service Restaurants	126%
2389	Other Specialty Trade Contra...	56%
3261	Plastics Product Manufacturing	50%
4471	Gasoline Stations	41%
5222	Nondepository Credit Interme...	17%
4529	Other General Merchandise St...	13%
4461	Health and Personal Care Sto...	-1%
6219	Other Ambulatory Health Care...	-4%
1133	Logging	-14%
5221	Depository Credit Intermedia...	-14%
5416	Management, Scientific, and ...	-24%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
5416	Management, Scientific, and ...	61%
3362	Motor Vehicle Body and Trail...	53%
2389	Other Specialty Trade Contra...	42%
6231	Nursing Care Facilities	39%
4471	Gasoline Stations	27%
4521	Department Stores	26%
4461	Health and Personal Care Sto...	20%
7221	Full-Service Restaurants	18%
6219	Other Ambulatory Health Care...	8%
3132	Fabric Mills	6%
5222	Nondepository Credit Interme...	5%
3222	Converted Paper Product Manu...	5%
5613	Employment Services	1%
3261	Plastics Product Manufacturing	1%
3321	Forging and Stamping	-2%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 50 jobs.

Employment Growth Trend

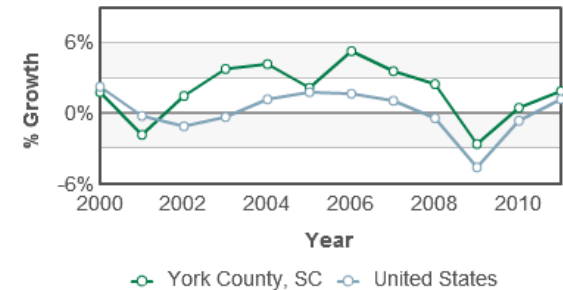
Key Statistics, 2011: York County, SC

Employment Base:	74,600
Payroll Base:	\$2.9 B
Job Growth Rate:	1.9%
Payroll Growth Rate:	4.6%
Total Unemployed:	15,500
Unemployment Rate:	13.6%
Average Salary:	\$38,400

Percentage Growth: York County job growth has underperformed the US over the past decade, including a larger downturn during the recession. The county has rebounded faster than the US, with employment growing 1.9% from 2010 to 2011.

YORK COUNTY, SC

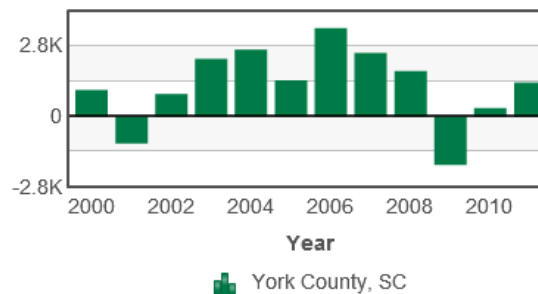
Annual Growth Rate, Employment, All Industries, 2000-2011
York County, SC vs. U.S.



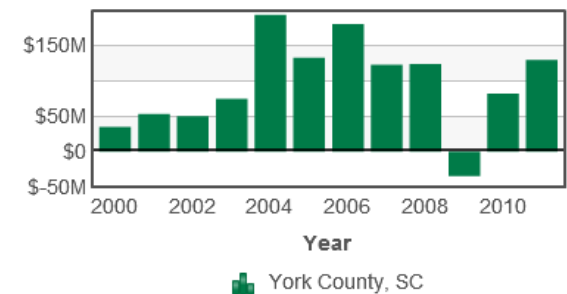
Net New Employment: During the recession, the county lost 1,600 jobs, with all losses occurring in 2009. Job creation turned positive in 2010, with 1,400 created in 2011.

Net New Payroll: The county's payroll base declined by \$35 million in 2009 but turned positive in 2010. Last year in 2011, the county's payroll grew by \$130 million.

Net New Employment, All Industries, 2000-2011
York County, SC



Net New Payroll, All Industries, 2000-2011
York County, SC



Industry Composition

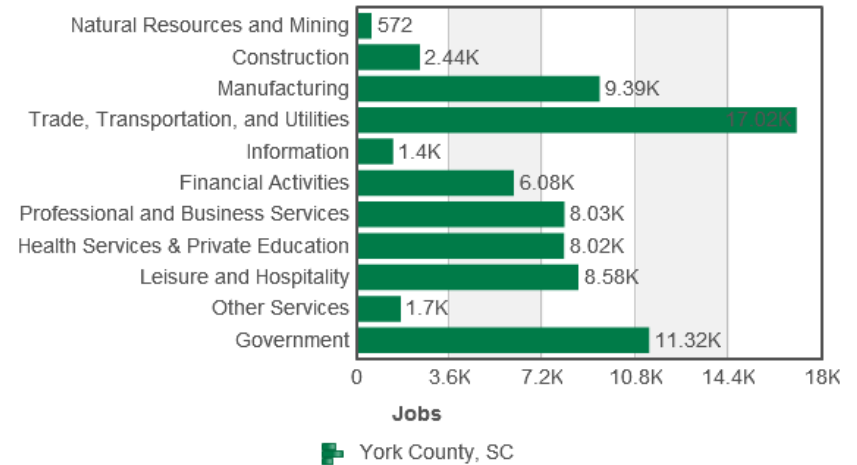
YORK COUNTY, SC

Top 3 Private Industries: York County's three largest industries in 2011 were Trade, Transportation and Utilities (17,000 jobs); Manufacturing (9,400); and Leisure and Hospitality (8,600).

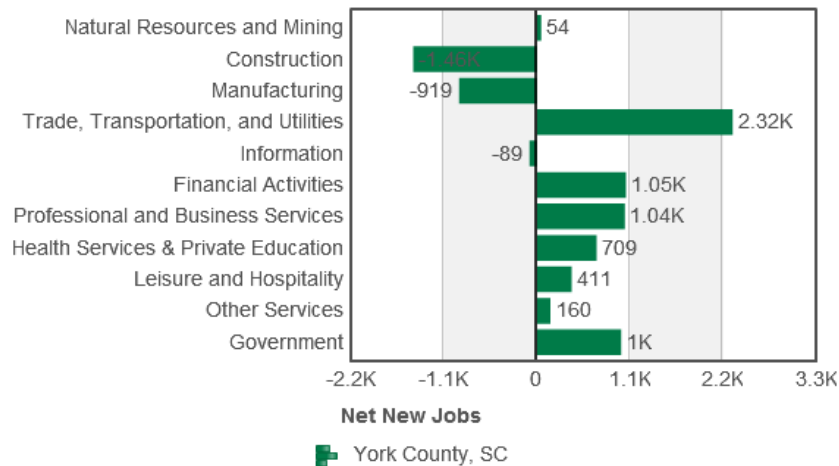
Net New Jobs: The only one of these industries to lose jobs from 2006-2011 was Manufacturing (-920). Of the other two Trade gained 2,300 jobs while Leisure and Hospitality gained 400.

Percentage Growth: Trade, Transportation and Utilities grew 16% from 2006-2011 while US growth in the industry was -4.6%. The industries with the largest percentage job losses were Construction (-38%) and Manufacturing (-9%).

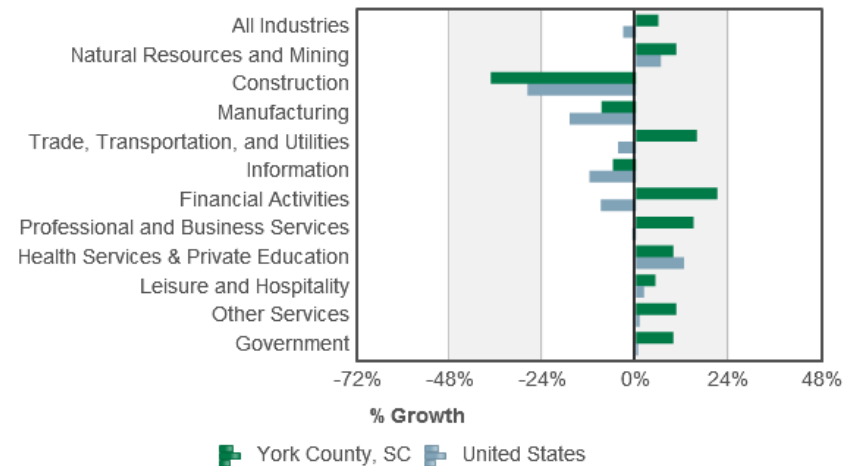
Employment by Industry, 2011
York County, SC



New Jobs, 2006-2011
York County, SC

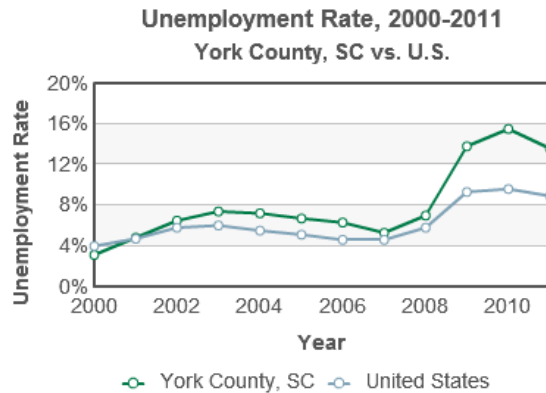


% Growth, Employment, 2006-2011
York County, SC vs. U.S.

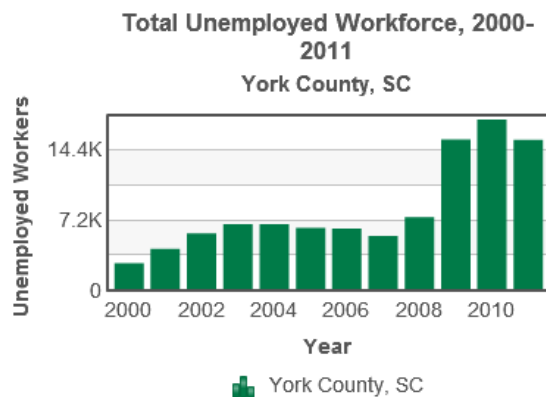


Workforce Conditions

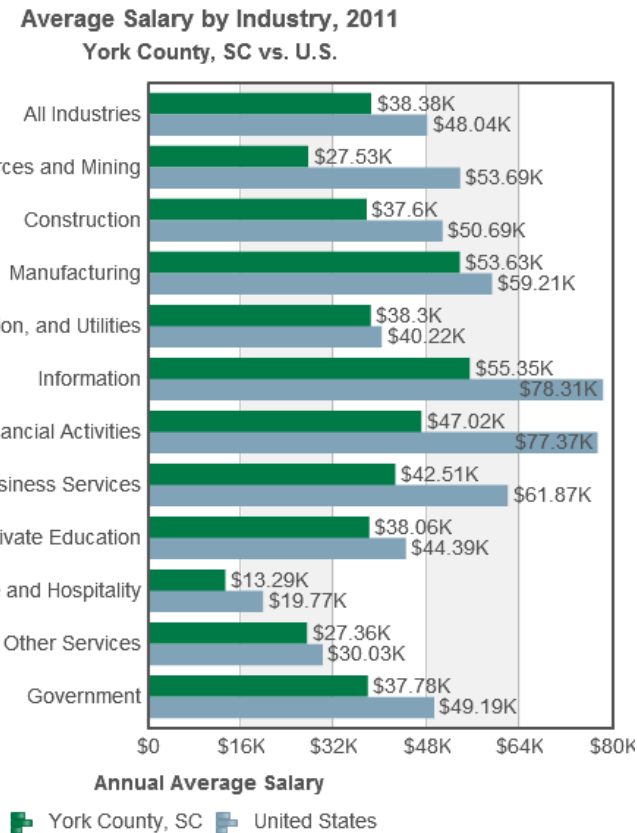
YORK COUNTY, SC



Unemployment: The unemployment rate in York County, now 13.6%, has been consistently higher than the US throughout the past decade. The number of unemployed workers in the county grew from 5,900 in 2007 to a peak of 17,500 in 2010 and has since declined.



Average Salary by Industry: York County's average salary reached \$38,400 in 2011. The Information industry has the county's highest average salary, \$55,400. High salaries are also found in Manufacturing (\$53,600) and Financial Activities (\$47,000).



From 2010-2011, the three industries with the fastest growing salaries were Financial Activities (6.6%), Manufacturing (5%), and Other Services (4.9%).

Top 15 Private Sector Industries by 4-Digit NAICS

YORK COUNTY, SC

LARGEST EMPLOYMENT

NAICS	Industry	Jobs
5222	Nondepository Credit Interme...	4,537
7222	Limited-Service Eating Places	3,694
5613	Employment Services	2,744
7221	Full-Service Restaurants	2,675
4529	Other General Merchandise St...	2,136
6221	General Medical and Surgical...	1,687
4451	Grocery Stores	1,645
4521	Department Stores	1,392
2211	Electric Power Generation, T...	1,311
3363	Motor Vehicle Parts Manufact...	1,140
6211	Offices of Physicians	1,108
5614	Business Support Services	1,076
2382	Building Equipment Contractors	966
4244	Grocery and Related Product ...	888
7139	Other Amusement and Recreati...	845

MOST NEW JOBS, Past 5 Years

NAICS	Description
5222	Nondepository Credit Interme...
4529	Other General Merchandise St...
4521	Department Stores
7222	Limited-Service Eating Places
4413	Automotive Parts, Accessorie...
5614	Business Support Services
6216	Home Health Care Services
4251	Wholesale Electronic Markets...
5324	Commercial and Industrial Ma...
3362	Motor Vehicle Body and Trail...
3334	Ventilation, Heating, Air-Co...
3345	Navigational, Measuring, Ele...
6241	Individual and Family Services
6233	Community Care Facilities fo...
4244	Grocery and Related Product ...

Net New Jobs

2007-2012
1,173
1,107
796
619
422
280
241
221
202
197
196
186
160
156
147

FORECASTED NEW JOBS, Next 5 Years

NAICS	Description	Net New Job: 2012-2017
5222	Nondepository Credit Interme...	1,629
7222	Limited-Service Eating Places	533
5613	Employment Services	414
5614	Business Support Services	333
5171	Wired Telecommunications Car...	291
7221	Full-Service Restaurants	286
4841	General Freight Trucking	218
4931	Warehousing and Storage	201
6221	General Medical and Surgical...	184
6216	Home Health Care Services	177
6211	Offices of Physicians	157
4244	Grocery and Related Product ...	150
3259	Other Chemical Product and P...	148
2382	Building Equipment Contractors	143
3212	Veneer, Plywood, and Enginee...	128

HIGHEST SPECIALIZATION (High LQ)

NAICS	Industry	Location Quotient
3131	Fiber, Yarn, and Thread Mills	16.1
5222	Nondepository Credit Interme...	14.7
3221	Pulp, Paper, and Paperboard ...	13.9
3132	Fabric Mills	12.9
3212	Veneer, Plywood, and Enginee...	12.4
3351	Electric Lighting Equipment ...	8.7
3259	Other Chemical Product and P...	8.1
7212	RV (Recreational Vehicle) Pa...	6.5
2211	Electric Power Generation, T...	5.7
3329	Other Fabricated Metal Produ...	5.4
3363	Motor Vehicle Parts Manufact...	4.9
3334	Ventilation, Heating, Air-Co...	4.3
5324	Commercial and Industrial Ma...	3.8
4243	Apparel, Piece Goods, and No...	3.8
3362	Motor Vehicle Body and Trail...	3.7

FASTEST % GROWTH, Past 5 Years

NAICS	Description
3362	Motor Vehicle Body and Trail...
5324	Commercial and Industrial Ma...
3345	Navigational, Measuring, Ele...
3334	Ventilation, Heating, Air-Co...
4521	Department Stores
7212	RV (Recreational Vehicle) Pa...
4413	Automotive Parts, Accessorie...
4234	Professional and Commercial ...
4529	Other General Merchandise St...
4251	Wholesale Electronic Markets...
3332	Industrial Machinery Manufac...
6241	Individual and Family Services
8141	Private Households
4249	Miscellaneous Nondurable Goo...
5611	Office Administrative Services

% Growth

2007-2012
563%
342%
291%
170%
134%
126%
118%
108%
108%
99%
98%
97%
55%
54%
54%

FORECASTED % GROWTH, Next 5 Years

NAICS	Description	% Growth 2012-2017
3359	Other Electrical Equipment a...	78%
4921	Couriers and Express Deliver...	49%
4841	General Freight Trucking	44%
5171	Wired Telecommunications Car...	40%
3259	Other Chemical Product and P...	39%
6241	Individual and Family Services	36%
5222	Nondepository Credit Interme...	36%
5416	Management, Scientific, and ...	33%
3212	Veneer, Plywood, and Enginee...	31%
6214	Outpatient Care Centers	31%
5614	Business Support Services	31%
4842	Specialized Freight Trucking	27%
6232	Residential Mental Retardati...	27%
3328	Coating, Engraving, Heat Tre...	26%
2389	Other Specialty Trade Contra...	25%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 150 jobs.



PROSPERITY FOR GREATER CHARLOTTE

2012 ~ 2017

Appendix B: Asset Inventory, Centralina SWOT, Target Industries and Competencies



Project Supporters



The work that provided the basis for this publication was supported by funding under an award with the U.S. Department of Housing and Urban Development. The substance and findings of the work are dedicated to the public. The author and publisher are solely responsible for the accuracy of the statements and interpretations contained in this publication. Such interpretations do not necessarily reflect the views of the Government

Project Consulting Team



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Introduction

Introduction to the Project

Creation of the **Prosperity for Greater Charlotte** Comprehensive Economic Development Strategy recognizes today's reality that economic dependencies and competencies require cross sector and jurisdictional collaboration, acknowledging that the Greater Charlotte region is a complex system with various subsystems. Based on this overarching and interconnected existence, this project updates the Centralina Economic Development Commission EDD CEDS with a comprehensive economic development planning approach that also analyzes and incorporates the systems and strategies that support the goal of the Greater Charlotte Region as a globally competitive, vibrant and resilient bi-state region of communities.

The primary three organizations that comprise this regional economic zone of influence are the US EDA Economic Development Districts of the Centralina Economic Development Commission in North Carolina and Catawba Regional Council of Governments in South Carolina, and, in cooperation with both North Carolina and South Carolina Departments of Commerce, the bi-state coverage of the Charlotte Regional Partnership.

This project provides the five year update to the 2007 Centralina Comprehensive Economic Development Strategy (CEDS) No Boundaries report and provides supporting research and data to the Catawba Regional Council of Government for their CEDS update in compliance with the requirements of the U.S. Department of Commerce Economic Development Administration, (EDA). The project is funded in part by the U.S. Department of Commerce, Economic Development Administration and "CONNECT Our Future", a \$4.9 million HUD Sustainable Communities Regional Planning Grant through a federal HUD-DOT-EPA Partnership for Sustainable Communities coalition. The CEDS Update findings, regional strategies and related county community assessments will provide input and deliver crucial economic foundation and data to the "CONNECT Our Future" planning process and ultimate outcomes.

WHY THIS PLAN?

This plan is premised on transcending traditional jurisdictional boundaries and barriers in a collaborative paradigm to assemble the most accurate and place based reality for the economic strategies and future of the entire Greater Charlotte Region.

Successful economic development today requires a plan to be in place. In fact, site selectors and companies now look to a region's plans as an indicator of where a community plans to be, how it plans to get there, and which institutions are accepting responsibility. Regions with cohesive and realistic plans will grow in a more organized fashion and better leverage the assets in each of the component counties or jurisdictions that comprise the area of economic influence.

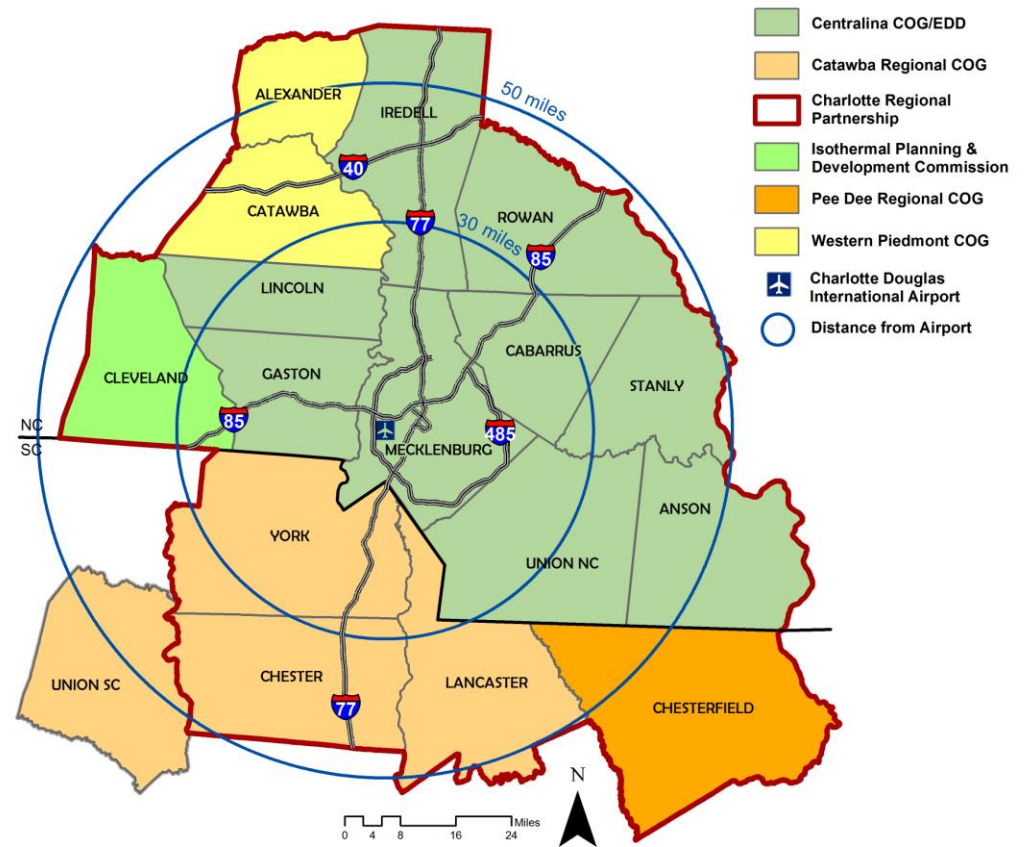


Rutherford Street in Wadesboro, NC
Greater Charlotte Region

The **Prosperity for Greater Charlotte** project and the HUD “CONNECT Our Future” Economic Development Group collaboratively partners the Centralina Council of Governments, Catawba Regional Council of Governments, Centralina Economic Development Commission, and the Charlotte Regional Partnership in an innovative, integrated approach that is essential to support the region’s future growth and prosperity.

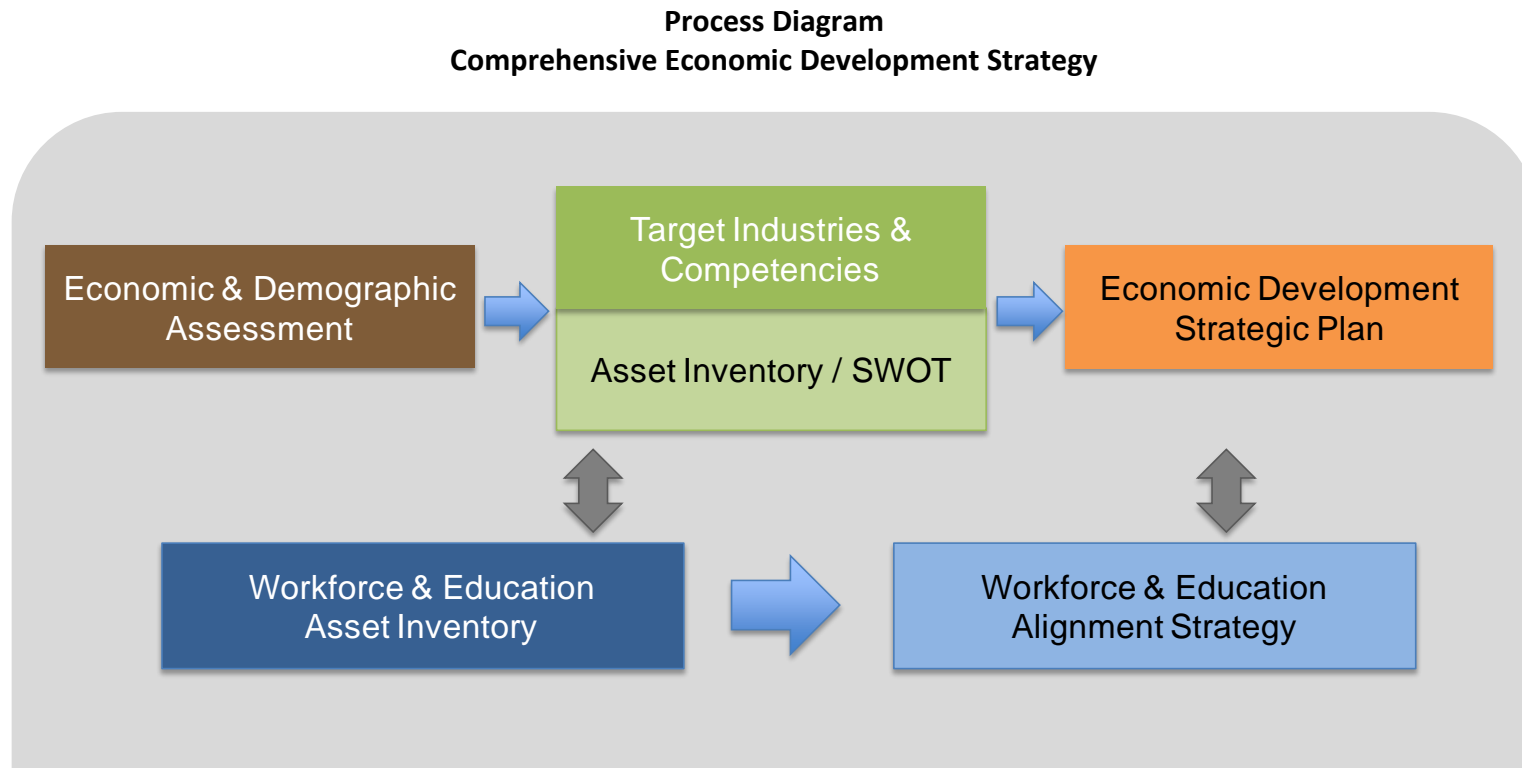
This Centralina EDD Comprehensive Economic Development Strategy outlines an approach to coordinate growth and prosperity that builds on the region’s strengths, prioritizes key regional industry clusters, and emphasizes collaboration. A key component of this strategic planning process is to help the regional economy boost its job growth rate by linking the region's workforce skills and strengths, education assets, and infrastructure to the needs of high-growth and emerging industries. The strategy will support and guide priorities for economic development in the region in order to create jobs, build community, and strengthen the local economy.

The use of “Greater Charlotte Region” in the language of this report is reflective of the larger collaborative analysis by the Centralina EDD and the additional inter-relational and centralized impacts of the 50 mile regional zone. However, all report findings and priorities with goals, objectives, and tactics are specifically endorsed and adopted only for the EDA approved nine county jurisdiction of the Centralina Economic Development Commission (EDD). This report in no way replaces or supplants adjacent EDD CEDS jurisdiction plans that share partial coverage within the economic zone of influence defined and analyzed for this report.



In anticipation of dynamic economics that will drive future global competitiveness; our innovative strategic plan design dictated inclusion of seventeen counties in the global competency analysis, parallel with the Charlotte USA footprint. This collaborative community network shown on the map illustrates the fifty mile radius economic zone that constitutes the Greater Charlotte 21st Century Global Region.

The diagram below shows the components and process of the Centralina Comprehensive Economic Development Strategy (CEDS):



The first phase of the Comprehensive Economic Development Strategy has two primary components: the *Economic & Demographic Assessment* and the *Asset Inventory / SWOT*.

The *Economic & Demographic Assessment* examined historical growth trends in the Greater Charlotte Region and the individual counties. Economic datasets presented and discussed include overall jobs, employment by industry, unemployment, shift-share analysis of regional industries, payroll, average salaries, and gross regional product. Demographic data presented includes overall population trends, age distribution, and incomes.

The second component, *Asset Inventory / SWOT*, inventories and evaluates key economic development assets in the Greater Charlotte Region. The report identifies assets in several categories: Workforce & Education, Entrepreneurship & Innovation, Infrastructure, Business Climate, and Quality of Life. For each of these topics, the report includes a SWOT (Strengths, Weaknesses, Opportunities, & Threats) assessment summarizing the key takeaways for the Centralina Comprehensive Economic Development Strategy.

Alongside these reports, the project team will complete a *Workforce & Education Asset Inventory*. This report inventories all college and K-12 educational programs; identifies existing workforce skills and competencies; and examines national and global workforce skill trends. This inventory provides an essential perspective for understanding regional strengths and industry objectives.

The second phase of the project builds on the previous reports, identifying and validating target industry clusters for the Greater Charlotte Region. The *Target Industries & Competencies* component includes a cluster analysis of regional industries, examining growth trends, location quotients, and employment bubble charts. The project team evaluated potential target industries by filtering candidates through numerous criteria, including the regional asset fit, national industry trends, and match to regional economic development goals. The *Target Industries & Competencies* report culminates in a list of target industry recommendations and profiles for each industry.

The project culminates in three strategic plans: the *Centralina Comprehensive Economic Development Strategy* and the integrally linked Greater Charlotte region *Workforce & Education Alignment Strategy* with the additionally linked, but independently completed, *Catawba Region Comprehensive Economic Development Strategy* of the Catawba Regional Council of Governments.



NC Research Campus, Kannapolis

The economic plan defines priorities and goals, objectives, and tactics to enhance the 9-county Centralina EDD region's overall business environment and maximize target cluster development. The workforce recommendations will be customized to match the 17-county region's target industries and competencies, specifically identifying future workforce skills needs for each target sub-cluster and planning to bridge gaps in the existing regional education and training pipeline to ensure each target is matched with a steady supply of qualified workers.



Charlotte Motor Speedway

CEDS Centralina Economic Development District Committee

The CEDC EDD Committee is comprised of the Centralina Economic Development Commission Board (shown below) who has initiated and facilitated the project with support of an expanded CEDS Advisory Council (shown on next page).

Centralina Economic Development Commission (CEDC)

Chairman
George Dunlap
Mecklenburg County BOC

Vice-Chairman
Bill Thunberg
Alexander Zachary Jewelers

Treasurer/Secretary
Joel Randolph
Randolph & Son Builders

President/Ex-Officio
Mike Manis, CED Director
Centralina Council of Governments

Ex-Officio
Jim Prosser, Executive Director
Centralina Council of Governments

Local Government Representatives

Anson County
Jarvis Woodburn, Commissioner

City of Charlotte
LaWana Mayfield, Council Member

Gaston County
Joe Carpenter, Commissioner

Iredell County
Tracy Jackson, Deputy Manager

Lincoln County
George Arena, Commissioners

Town of Mooresville
Miles Atkins, Mayor

Rowan County
Jeanie Moore, Rowan-Cabarrus Community College
Robert Van Geons, Salisbury-Rowan Economic Development Commission

Stanly County
Tony Dennis, Commissioner
Paul Stratos, Stanly County Economic Development Commission

Business & Industry Representatives

Thomas R. Anderson, Mountain Island Fitness

Chuck Boyle, Boyle Consulting Engineers, PLLC

Chris Carney, NC Legislature

Mark Brady, First Trust Bank, Mooresville

Robby Carney, Mooresville-South Iredell Economic Development Corporation

Astrid Chirinos, Latin American Chamber of Commerce-Charlotte

Tim Gause, Duke Energy

Manuel Rey, Fifth Third Bank

Dan Ramirez, Nova Engineering

Fred Sparger, Retired South Piedmont Community College

CEDS Advisory Council (expanded members to EDD committee)

In addition to the CEDC EDD Committee, an additional group of regional community leaders contributed their added passion and expertise to the formation of a CEDS Advisory Council that led, advised and facilitated project activities throughout the duration of the CEDS update project:

Bill Anderson, Executive Director, Meck Ed

Jimmy Chancey, Director, Career & Technical Education, Charlotte-Mecklenburg Schools

Vanessa Goeschl, VP, Marketing & Research, Charlotte Regional Partnership

Stuart Hair, Existing Industry Coordinator, North Carolina Department of Commerce

Donny Hicks, Executive Director, Gaston County Economic Development Corporation

Brad Howard, Chairman, Mooresville-South Iredell Economic Developer Council

Jack Keiser, Director of Planning, City of Gastonia

Jonathan Marshall, Deputy County Manager, Cabarrus County

Samantha Moose, Existing Industry Services, Cabarrus Economic Development Corporation

Steve Partridge, Executive Director, Charlotte Works

Michael Realon, Career Development Coordinator, Olympic Community of Schools

Mary Vickers-Koch, Dean, Corporate & Continuing Education, Central Piedmont Community College

Paul Wetenhall, President, Ventureprise

Anna Lu Wilson, VP of Business Services, Cabarrus Economic Development Corporation

Richard Zollinger, VP for Learning, Central Piedmont Community College

Geographic Area of Focus

For the purposes of this project, an established economic zone of influence was incorporated that is greater than the Centralina EDD\CEDS that covers nine NC counties centered on Charlotte, North Carolina. The Greater Charlotte Region encompasses 17 counties in North Carolina and South Carolina and multiple regional economic development organizations:

- Centralina Council of Governments (NC),
- Catawba Regional Council of Governments (SC)
- Charlotte Regional Partnership (Charlotte USA)
- Western Piedmont Council of Governments (NC)
- Isothermal Planning & Development Commission (NC)
- Pee Dee Regional Council of Government (SC)

The nationally and globally embraced “Charlotte USA” footprint recognizes the economic and demographic influences of the Combined Metropolitan Statistical Area (CBSA) of “Charlotte-Gastonia-Salisbury, NC” 13 regional counties and the additional 4 counties contiguous to this geographic US Census zone. This project examines the composite Greater Charlotte Region and also provides breakout sub-reports of trends in each individual county.

The Greater Charlotte Region is comprised of the following counties:

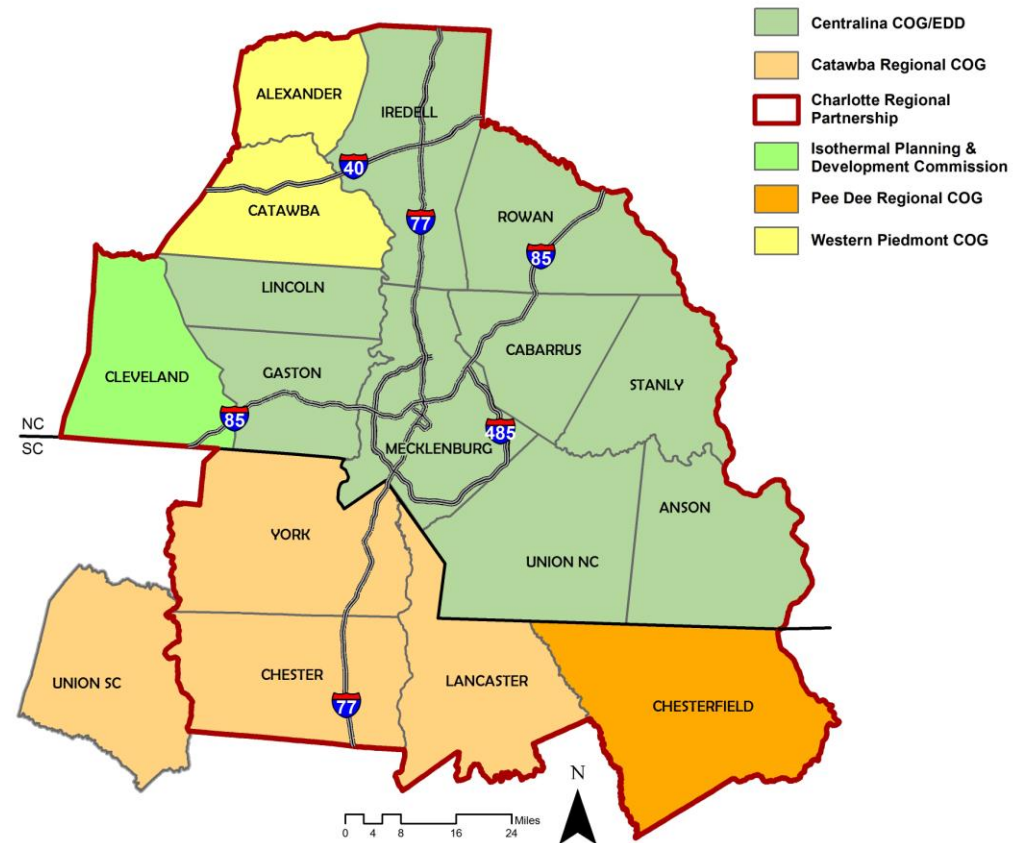
North Carolina

- Alexander County
- Anson County
- Cabarrus County
- Catawba County
- Cleveland County
- Gaston County
- Iredell County
- Lincoln County
- Mecklenburg County
- Rowan County
- Stanly County
- Union County

South Carolina

- Chester County
- Chesterfield County
- Lancaster County
- Union County
- York County

Greater Charlotte Region



Why Target?

Companies in the same industries often benefit from locating in close geographic proximity. Geographic clustering can increase productivity through shared access to clients and suppliers in other industries. Clustering also allows for access to a larger trained workforce and sharing of research and knowledge. These benefits make clustering a smart strategy for businesses, increasing efficiencies, and saving money and time.

Targeting specific industry clusters also allows a community to focus economic and workforce development resources on those that achieve local goals and generate the highest return on investment. Because organizations have limited funding and staff, they must prioritize activities. Targeting focuses a community's activities on those expanding industry clusters in which the community is most competitive. Economic development organizations commonly have up to six target industries, concentrating on supporting and attracting primary employers (see side bar).

To be most effective, target clusters must include detailed target sub-clusters that reflect knowledge of these industry needs and a community's matching assets. When well chosen, a target cluster strategy yields greater job creation results when aligned with local educational curricula, workforce development programs, public policy, and infrastructure investments.

Finally, targeting specific clusters over others does not imply that non-targeted clusters will remain stagnant. Instead, targeting increases overall economic growth and regional wealth, and all local businesses benefit from this increased economic activity and job creation.

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What is a Primary Employer?

Primary employers are businesses that export goods and services outside of the local economy. These exports inject new dollars into the economy, resulting in increased wages and jobs as revenue earned by the business is spent on employee salaries and goods and services that it purchases from local suppliers. As this funding is earned, it is redistributed throughout the rest of the economy, multiplying in impact. Manufacturing and software companies are examples of primary employers.

What is a Secondary Employer?

Secondary employers serve the local community. A majority of the goods and services created by those organizations are consumed within the community. While these goods and services are important staples of a community, the multiplier effect of spending is less than that by primary employers. Retail and construction are examples of secondary employers.

Target Identification Process

Target identification is not a perfect science. Numerous factors inform business location decisions. As a result there is no single mathematical formula for determining the eligibility of potential target industries for a community. Instead, target identification is an iterative process that considers both quantitative and qualitative inputs. The process is further complicated because modern industry definitions are broad and traditional government terminology, including NAICS codes (North American Industry Classification System), do not always ideally describe industries as they exist today, particularly for marketing purposes. To develop a clear understanding of local dynamics, target clusters and sub-clusters must be tailored to a specific community through the identification and definition process.

The selection of the target industries and competencies for the Greater Charlotte Region follows an iterative process used by Avalanche Consulting. Individual target areas (industries and competencies) are examined:

- Does the cluster have a regional presence?
- Does the local asset base match the needs of the industry? Avalanche considers physical infrastructure, current businesses, workforce skills, and cost conditions.
- Is the industry growing at the national level and/or offer opportunities for communities to compete for corporate expansions?
- Does the local community exhibit areas of relative competitiveness, which would compel an industry to relocate or expand locally versus elsewhere in the US?
- Does the industry's "ROI" match the community's vision? We consider the impact on job creation and increasing the average salary.
- Is there adequate State support for the cluster?
- Does the target provide some type of "strategic" value to the community, such as creating synergies with assets or industries already found in the region?
- Do local economic development organizations have sufficient resources to recruit, expand, and support entrepreneurship of companies in the cluster?

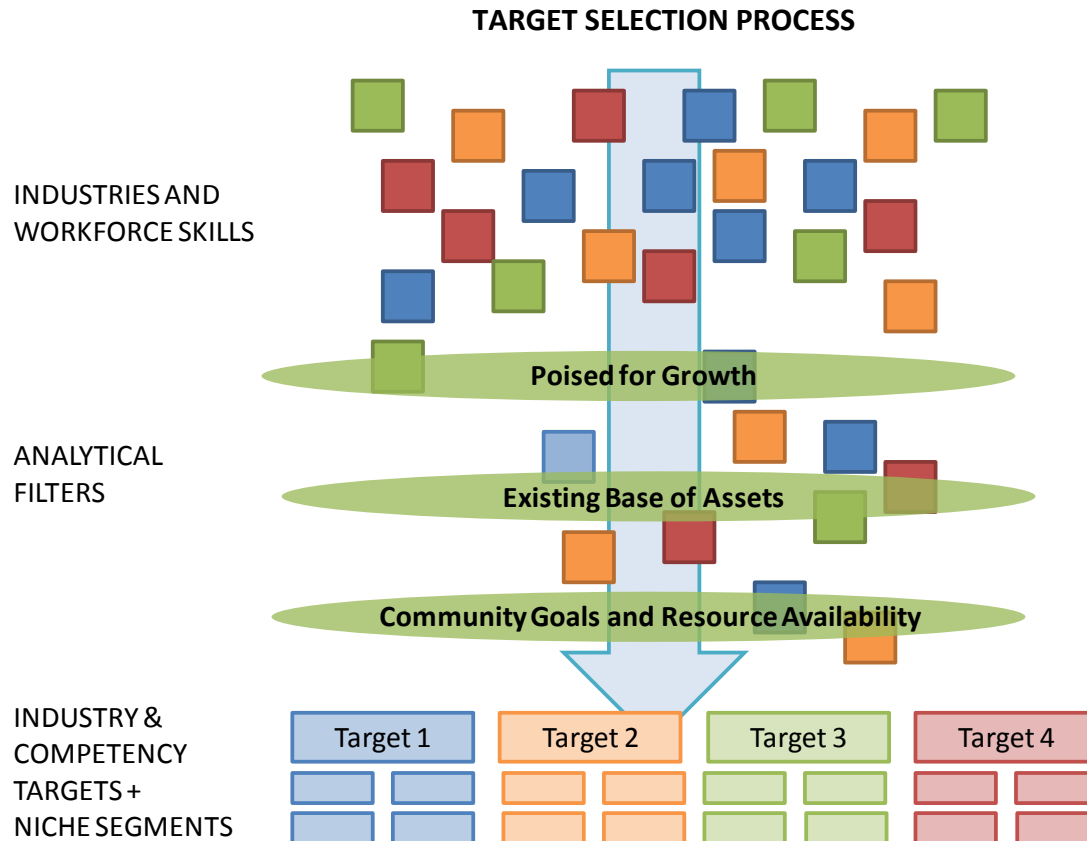
A target list should consider that each audience will require a different mix of organizational efforts. Recruiting manufacturing companies may focus on an external marketing campaign, for example, while entrepreneurial targets require program development focused on the local community. Targets can be any combination of the following:

- Recruitment: These targets are typically the focus of economic developers, who conduct marketing campaigns, attend industry conferences, and respond to state information requests for their prospects.
- Retention: Most communities have a “BEAR” program (Business Expansion And Retention), which puts local ambassadors in front of a community’s employers to hear their needs and identify companies at risk of closure.
- Expansion: We consider an expansion target to be different from retention activities. Providing expansion services includes helping a local company identify new hires for their growth plan, identify and pursue new markets for their goods/services, or innovate new products.
- Startup: Some industry sectors are ideally suited for entrepreneurship. Traditionally, incubators and SBDCs are the service providers that assist small businesses to expand. These companies sometimes need expansion services as described above, but also need structural assistance (corporate formation, partnership development, funding assistance) which requires a different set of services than traditional economic development organizations are prepared to deliver. Quite often, entrepreneurs benefit the most from organized (but informal) interactions with their peers and experienced mentors.

Furthermore, target selection should consider the stage of a target’s development, as some targets will take longer to develop than others. We qualify each target’s potential as being immediate, mid-term, or long-term:

- Immediate Opportunity: The region has adequate assets and industry presence to immediately begin marketing to these clusters. Examples include the expansion of a strong existing cluster or clusters that could likely expand with simple improvements to the region’s assets.
- Mid-Term Opportunity: These clusters are forecasted for future growth and have roots in the region. However, the region currently lacks one or more assets necessary to strongly compete for projects. The project team will suggest ways for the Alliance and its partners to strengthen its competitive position so that the cluster may be marketed to within three to five years.
- Long-Term Opportunity: These emerging clusters are forecasted for strong growth, but currently have limited to no presence in the region. The region is either lacking in one or more major areas necessary to compete, or the cluster is small and emerging at present. The project team will suggest long term investments that position the region for cluster growth on the long-term horizon.

Research and a stakeholder/employer input process were conducted as part of our review and the broader list of potential targets was narrowed down to a final “best list” for the region. “Niche” targets are identified under a smaller set of macro targets. The following diagram demonstrates our target selection process.



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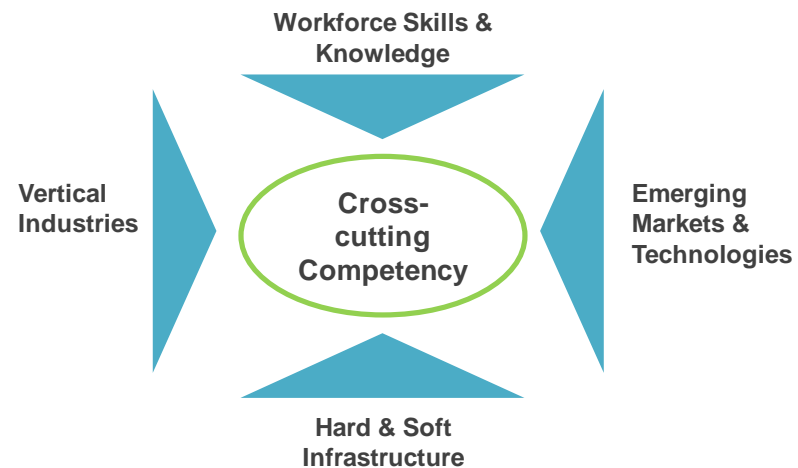
What Are “Competencies” and Why Include Them as Targets?

Avalanche Consulting believes that the concept of “target industries” is no longer sufficient to guide economic development alone. In fact, many “industries” that we discuss are actually end-consumer markets (e.g. the defense industry sells any kind of product to the military; the tourism industry include the hotel and restaurant industries that serve tourists). Sometimes industries are products, as in the case of the Energy industry, which includes any combination of supply chain activities such as extracting inputs to feed into specially designed equipment which make energy products that are ultimately distributed to energy consumers. We can also move in the other direction away from the end-market and toward the worker that creates a product. Is “Information Technology” an industry or a worker skill?

For these reasons, we encourage communities to embrace 21st Century language about the value-add within their community. In fact, communities are the unique combination of their workforce skills, technology and product knowledge, ability to produce and manufacture, and ability to market and deliver products to their consumers. Globally-oriented companies know they must do all of these things well; communities must now do the same under a highly coordinated and collaborative effort across organizations, workers, and industry clusters.

Today’s challenge for communities is to build multiple competencies that spark new industries and products – to not work just to protect what you have, but to focus on the new products and markets that will create new jobs. This is the future of globally competitive communities in the US.

Competencies Form at the Nexus of Industry, Workforce, Technology and Infrastructure

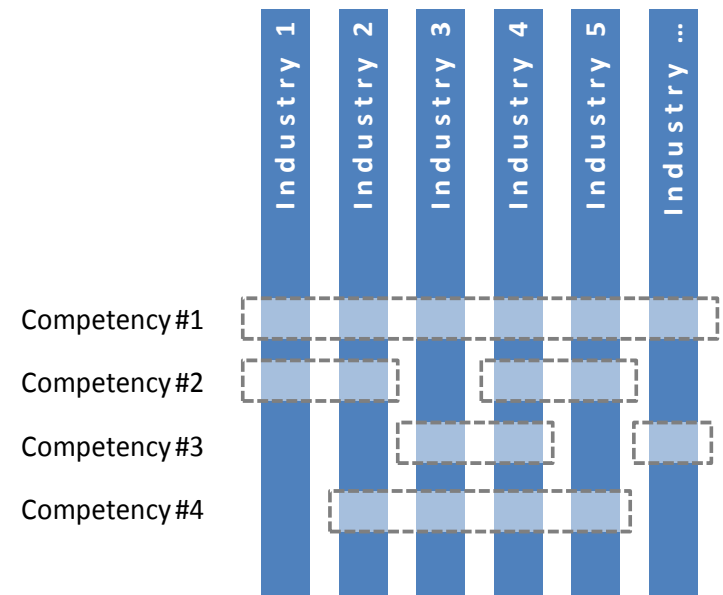


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A **vertical industry** is one that is focused on a specific market or product, such as aerospace, automotive, and biomedical. These are the “industries” that usually comprise a target industry plan, and are usually listed on an economic development website as the region’s focus.

A **horizontal (or platform) competency** can consist of a unique technology, workforce skill, or physical asset that supports numerous vertical industries. A multimodal transportation network (port-rail-highway) is one example, as it can serve any number of industries that might manufacture, test, or distribute their goods locally. Competencies are also workforce-specific, such as skills in machining, IT, advanced materials, or design. Competencies can influence some or all industry targets in a region.

As shown in the diagram to the right, the combination of industries and competencies form a lattice of connections that make a region unique. The Greater Charlotte Region’s future economic development activities should focus both on its vertical target industries and its horizontal competencies that support target and other industry success.



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Outline of This Report

To explain our target selection process in a straightforward, easy-to-read manner, we have organized the various research steps into the following sections.

- Section 1: Industry Cluster Dynamics
- Section 2: Asset Inventory
- Section 3: SWOT Tables
- Section 4: Community Feedback on Targets
- Section 5: Target Recommendations
- Appendix A: County Industry Cluster Snapshots
- Appendix B: County Detailed Industry Clusters Trends

Section 1:

Industry Cluster Dynamics

Location Quotient and Growth Analysis of Industry Clusters

This section illustrates the region's industry cluster dynamics. The bubble chart shows three variables for each industry depicted: total size of employment, 2006-2011 growth rate, and location quotient (concentration of employment in each industry in the region compared to the US average).

- Greater Charlotte's three largest clusters by employment size are Retail (141,720 employees), Culture & Entertainment (121,990 employees), and Healthcare (108,750 employees).
- The region's three fastest growing clusters of the past five years (2007 to 2012) were Research (32%, 3,660 new jobs), Education (23% growth, 2,880 new jobs), and Aerospace (13% growth, 80 new jobs.)
- The three fastest forecasted growth clusters (2012 to 2017) for the region are: Research (36% forecast growth), Healthcare (19%), and Back Office (17%). [Note: Forecasts from EconomicModeling.com]

First, we provide a description of the industry clusters as a reference, followed by the cluster charts and tables.

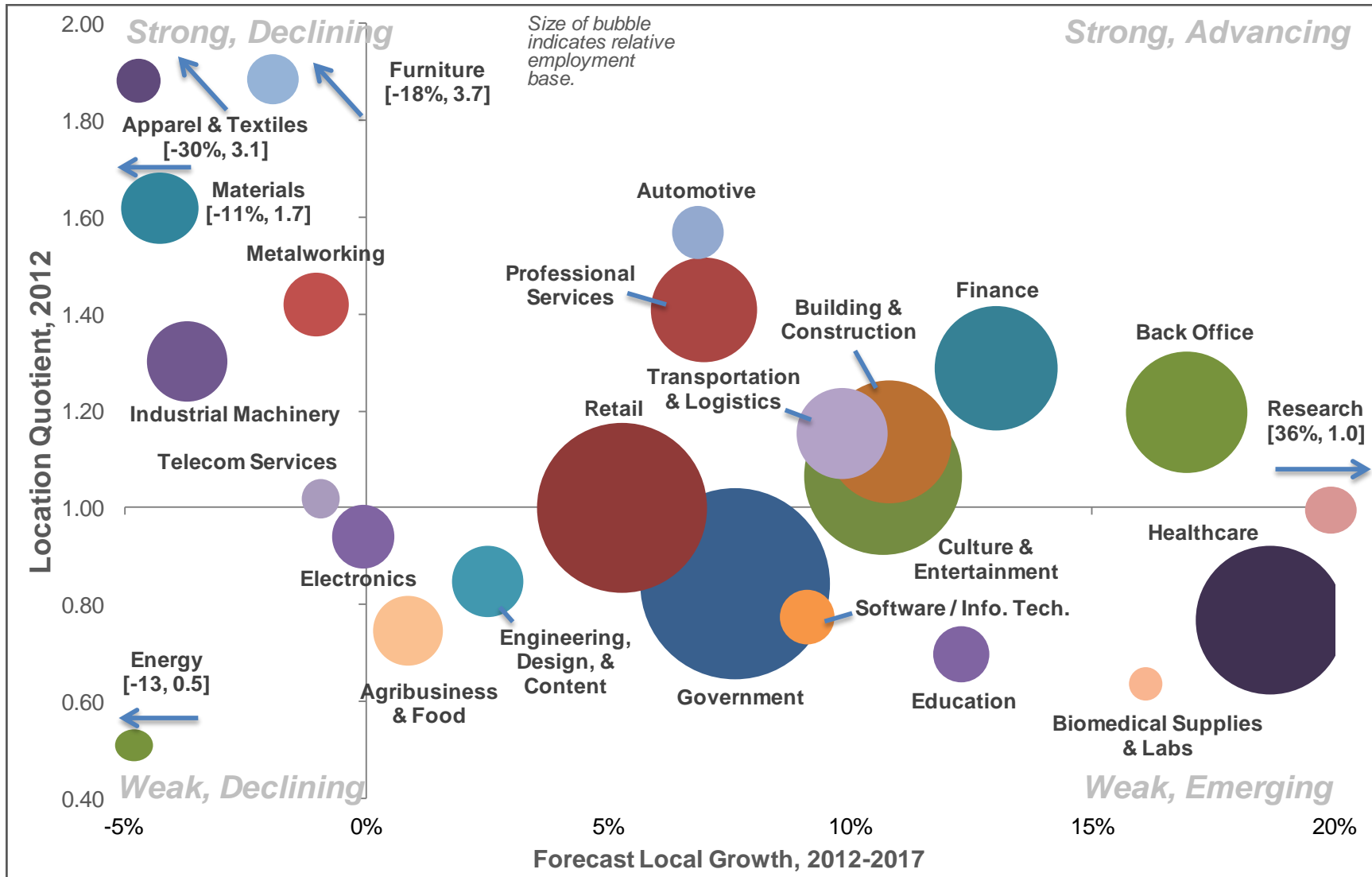
Industry Cluster Definitions

Aerospace	Operations engaged in research, design, and manufacturing aerospace and space technology, products, and parts, including commercial aircraft, military craft, and unmanned aerial vehicles (UAVs).
Agribusiness & Food	Operations engaged in raising, harvesting, processing, and manufacturing crops, food, and beverage products. Operations include farming, dairy, ranching, hunting, fishing, and all support activities, such as pesticide manufacturing. Also includes manufacture of tobacco and processed food products, such as sugar, flour, and canned goods.
Apparel & Textiles	Operations engaged in processing natural products such as cotton and leather into consumer textiles and apparel products. These include fabric mills, textile mills, and cut and sew apparel manufacturing.
Back Office	Operations engaged in support activities for the day-to-day operations of other businesses, including office administration, facilities support, employment services, and business support.

Biomedical Supplies & Labs	Operations engaged in manufacture and wholesale of medicine, pharmaceuticals, and medical equipment. Also includes medical and diagnostics laboratories.
Building & Construction	Operations engaged in construction of buildings and engineering projects, such as highways and utility systems. Also includes operations manufacturing products related to construction, such as lumber, clay, glass, cement, and lime.
Consumer Goods Mfg.	Operations engaged in manufacture of household appliances and other miscellaneous nondurable goods for consumers.
Culture & Entertainment	Operations engaged in leisure and accommodation, including hotels, restaurants, bars, casinos, museums, performing arts, and sporting facilities. Also includes independent performers, artists, and direct tourist activities.
Education	Operations engaged in <i>private</i> education, including elementary and secondary schools, colleges, universities, professional schools, trade schools, and educational support services.
Electronics	Operations engaged in manufacture, wholesale, and repair of electronic equipment, including computers, televisions, semiconductors, and other electronic components.
Energy	Operations engaged in all vertically aligned elements of the energy sector, including oil extraction, coal mining, pipeline transportation of oil and gas, and electric power generation, transmission, and distribution.
Engineering, Design, & Content	Operations engaged in highly specialized technical sectors including architecture, advertising, engineering, and design as well as creative and information sectors such as movie and music production, radio and television programming, newspaper and magazine production, and internet publishing.
Finance	Operations engaged in financial, insurance, and real estate activities, such as banks, insurance carriers, and real estate brokers.
Furniture	Operations engaged in manufacture and wholesale of household, office, and commercial furniture and cabinets.
Government	Operations of federal, state, and local government agencies, waste collection and management, and water treatment.
Healthcare	Operations engaged in direct provision of healthcare and social services, including private hospitals, doctor offices, elderly care, child day care, family services, and home nursing care.
Industrial Machinery	Operations engaged in manufacture and wholesale of industrial application machinery, including agricultural and mining equipment, HVAC systems, metalworking machinery, turbines, lighting, and other equipment.
Logging & Mining	Operations engaged in forestry, logging, and mining: not including oil, gas, and coal extraction.

Materials	Operations engaged in design, wholesale, and manufacture of traditional and complex materials, including paper, chemicals, plastics, rubber, and other advanced materials.
Metalworking	Operations engaged in processing minerals into metal products and manufacture of components and products from metal. This includes steel mills, foundries, fabricated metal and structural metal manufacturing, and hand-tool manufacturing.
Non-Profits	Operations engaged in non-profit activities, including churches, social advocacy, and civic and professional associations.
Professional Services	Operations engaged in technical consulting services for businesses, including legal, accounting, management, and other technical work such as environmental management.
Research	Operations engaged in scientific research and development and scientific consulting services.
Retail	Operations engaged in retail sale of goods and services to consumers, including car dealers, grocery stores, clothing stores, gas stations, auto repair, personal care, and equipment rental.
Shipbuilding	Operations engaged in construction of ships and boats.
Software / Information Technology	Operations engaged in information technology sectors, including software publishing, internet service providers, computer system design, data processing and hosting, and other information services.
Telecom Services	Operations engaged in wired, wireless, and satellite telecommunications, including cell phone and cable providers.
Transportation & Logistics	Operations engaged in transportation of goods and individuals; warehousing and storage of goods; and delivery of post and packages. This includes commercial, personal, and tourism transportation on air, rail, water, and roads.

Industry Clusters: Greater Charlotte Region



Source: Avalanche Consulting using data from EMSI

Greater Charlotte Region Industry Cluster Competitiveness

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	754	0.18	12.5%	84	(26)	-3.4%	0.2%
Agribusiness & Food	23,166	0.74	-12.0%	(3,147)	200	0.9%	1.9%
Apparel & Textiles	13,194	3.09	-46.6%	(11,506)	(3,928)	-29.8%	-20.1%
Automotive	13,289	1.57	-19.2%	(3,159)	913	6.9%	-6.0%
Back Office	71,964	1.20	-2.2%	(1,631)	12,211	17.0%	8.3%
Biomedical Supplies & Labs	5,492	0.64	7.7%	393	886	16.1%	8.0%
Building & Construction	74,433	1.14	-31.5%	(34,178)	8,053	10.8%	5.3%
Consumer Goods Mftg	4,967	0.93	-18.7%	(1,146)	(165)	-3.3%	-0.6%
Culture & Entertainment	121,988	1.07	5.9%	6,752	13,030	10.7%	6.2%
Education	15,372	0.70	23.1%	2,880	1,892	12.3%	13.2%
Electronics	19,311	0.94	-8.6%	(1,810)	(12)	-0.1%	1.3%
Energy	6,675	0.54	-9.6%	(707)	(862)	-12.9%	-1.5%
Engineering, Design, & Content	24,343	0.85	-16.8%	(4,933)	614	2.5%	2.0%
Finance	74,617	1.29	-6.3%	(4,999)	9,725	13.0%	3.2%
Furniture	13,175	3.68	-38.2%	(8,138)	(2,418)	-18.4%	-3.5%
Government	176,400	0.84	4.1%	7,008	13,469	7.6%	4.0%
Healthcare	108,750	0.77	11.1%	10,890	20,332	18.7%	11.8%
Industrial Machinery	31,529	1.30	-8.8%	(3,061)	(1,170)	-3.7%	-1.2%
Logging & Metal/Mineral Mining	1,414	0.88	-23.7%	(440)	(58)	-4.1%	-2.2%
Materials	23,306	1.65	-15.2%	(4,166)	(2,630)	-11.3%	-7.2%
Metalworking	20,054	1.42	-17.9%	(4,381)	(207)	-1.0%	-5.1%
Non-Profits	5,383	0.48	-38.1%	(3,315)	482	9.0%	6.3%
Professional Services	54,245	1.41	5.8%	2,990	3,790	7.0%	5.5%
Research	15,175	0.99	31.8%	3,658	5,421	35.7%	21.5%
Retail	141,718	1.00	-3.2%	(4,755)	7,492	5.3%	3.3%
Shipbuilding	14	0.01	-48.1%	(13)	(9)	-64.3%	-6.0%
Software / Info. Tech.	14,724	0.77	8.3%	1,129	1,345	9.1%	16.5%
Telecom Services	7,167	1.02	-1.9%	(141)	(67)	-0.9%	-2.0%
Transportation & Logistics	40,590	1.15	-8.9%	(3,944)	3,996	9.8%	4.6%
Total	1,123,206	1.00	-5.7%	(68,238)	92,289	8.2%	5.2%

Source: Avalanche Consulting using data from EMSI

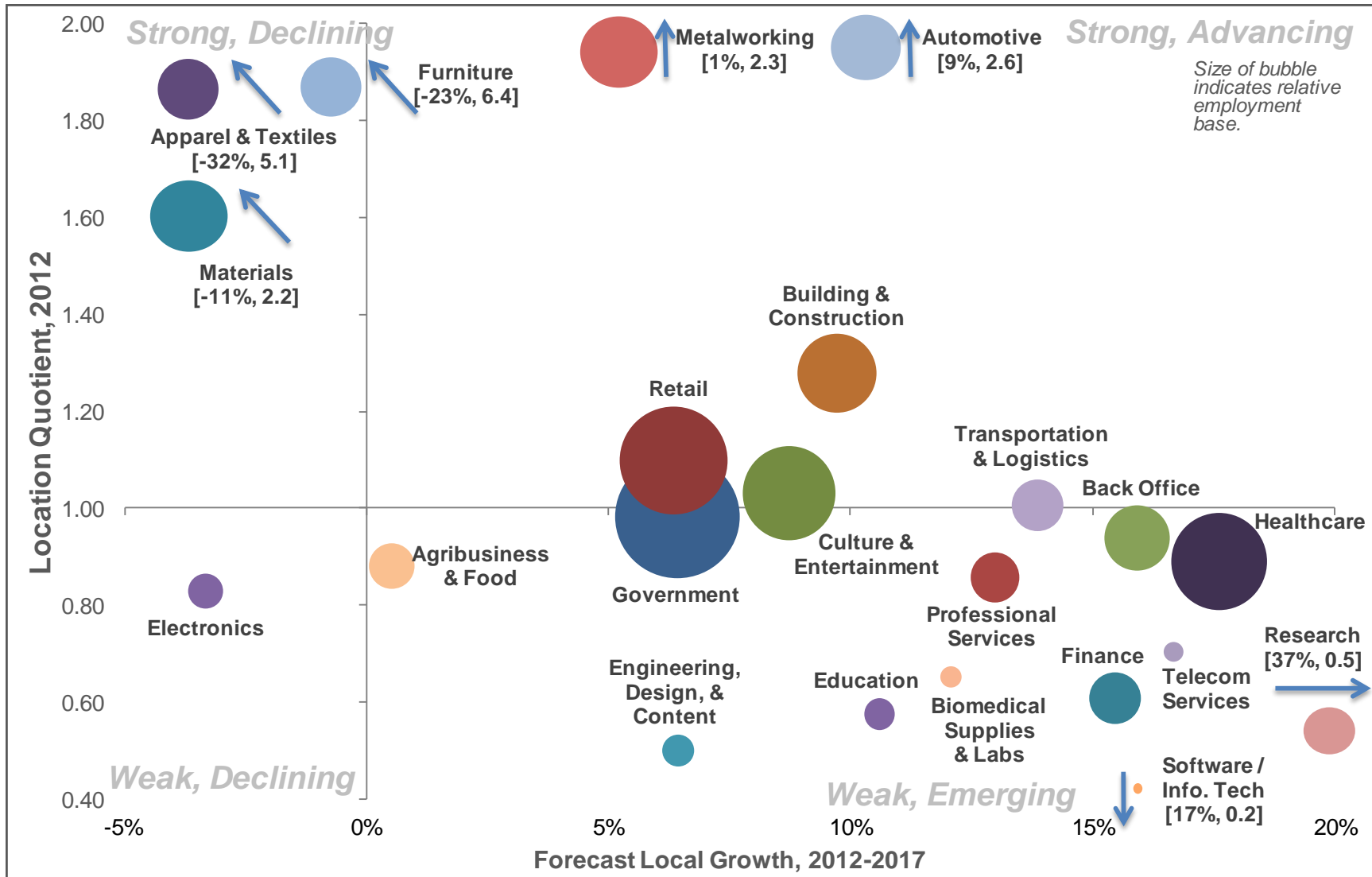
Avalanche Consulting also examined the counties surrounding Mecklenburg County in order to see the dynamics of clusters outside the urban core.

The counties surrounding Mecklenburg County exhibit these three largest clusters by employment size: Retail (79,310 employees), Healthcare (64,060 employees), and Culture and Entertainment (60,030 employees).

- The Non-Mecklenburg region's three fastest growing clusters of the past five years (2007 to 2012) were Healthcare (6%, 3,370 new jobs), Professional Services (12% growth, 1,830 new jobs), and Research (51% growth, 1,430 new jobs.)
- The three fastest forecasted growth clusters (2012 to 2017) for the Non-Mecklenburg region are: Research (37% forecast growth), Healthcare (18%), and Software/Info. Tech (17%). [Note: Forecasts from EconomicModeling.com]
- The Non-Mecklenburg region's clusters with the highest concentration (highest Location Quotient) are Furniture (LQ=6.40), Apparel & Textiles (5.11), and Automotive (2.63). These clusters represent the areas of greatest specialization and competitiveness for the region.

Declining clusters in the Non-Mecklenburg region include Building & Construction, which employs 42,610 workers, has an LQ of 1.8, and lost 31% of its employment base (18,740 jobs) in the last five years. Apparel & Textiles employs 11,100, LQ=5.11, and lost 50% (11,210 jobs). Furniture employs 11,670, LQ=6.40, and lost 41% (8,150 jobs).

Industry Clusters: Regional Counties with Mecklenburg Exclusion



Source: Avalanche Consulting using data from EMSI

Regional Counties with Mecklenberg Exclusion Industry Cluster Competitiveness

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	575	0.28	7.5%	40	(33)	-5.7%	0.2%
Agribusiness & Food	13,920	0.88	-14.1%	(2,288)	74	0.5%	1.9%
Apparel & Textiles	11,093	5.11	-50.3%	(11,209)	(3,542)	-31.9%	-20.1%
Automotive	11,339	2.63	-20.4%	(2,902)	1,044	9.2%	-6.0%
Back Office	28,668	0.94	-0.9%	(247)	4,566	15.9%	8.3%
Biomedical Supplies & Labs	2,865	0.65	2.2%	63	346	12.1%	8.0%
Building & Construction	42,608	1.28	-30.5%	(18,742)	4,135	9.7%	5.3%
Consumer Goods Mftg	3,012	1.11	-22.9%	(896)	(304)	-10.1%	-0.6%
Culture & Entertainment	60,025	1.03	0.3%	199	5,242	8.7%	6.2%
Education	6,440	0.57	15.9%	884	682	10.6%	13.2%
Electronics	8,654	0.83	-14.5%	(1,472)	(287)	-3.3%	1.3%
Energy	4,106	0.65	-4.6%	(198)	(316)	-7.7%	-1.5%
Engineering, Design, & Content	7,306	0.50	-13.1%	(1,105)	471	6.4%	2.0%
Finance	17,886	0.61	-2.3%	(415)	2,765	15.5%	3.2%
Furniture	11,656	6.40	-41.1%	(8,146)	(2,672)	-22.9%	-3.5%
Government	104,723	0.98	1.1%	1,160	6,723	6.4%	4.0%
Healthcare	64,060	0.89	5.6%	3,371	11,281	17.6%	11.8%
Industrial Machinery	13,926	1.13	-14.8%	(2,418)	(797)	-5.7%	-1.2%
Logging & Metal/Mineral Mining	1,199	1.47	-22.7%	(352)	(71)	-5.9%	-2.2%
Materials	15,654	2.18	-13.9%	(2,524)	(1,663)	-10.6%	-7.2%
Metalworking	16,588	2.31	-17.0%	(3,388)	190	1.1%	-5.1%
Non-Profits	2,688	0.47	-24.7%	(884)	328	12.2%	6.3%
Professional Services	16,773	0.86	12.2%	1,830	2,177	13.0%	5.5%
Research	4,212	0.54	51.2%	1,427	1,575	37.4%	21.5%
Retail	79,309	1.10	0.8%	619	5,025	6.3%	3.3%
Shipbuilding	14	0.03	-48.1%	(13)	(9)	-64.3%	-6.0%
Software / Info. Tech.	1,650	0.17	10.7%	160	282	17.1%	16.5%
Telecom Services	2,519	0.70	6.7%	158	420	16.7%	-2.0%
Transportation & Logistics	17,985	1.00	-3.4%	(641)	2,495	13.9%	4.6%
Total	571,499	1.00	-8.0%	(49,922)	40,139	7.0%	5.2%

Source: Avalanche Consulting using data from EMSI

Section 2:

Asset Inventory

Introduction

This section of the report examines the Greater Charlotte Region's economic development assets and evaluates the region's competitiveness through a SWOT (Strengths, Weaknesses, Opportunities, and Threats) assessment of four major categories: Workforce & Education, Infrastructure, Entrepreneurship & Innovation, and Quality of Life. Each of the following categories is particularly important to economic development:

Workforce & Education

Access to talent is the number one need of modern companies. In this section, we provide a high-level view of the region's workforce strengths and demographic components that would support target industry growth. Much of this information is a preview of a more detailed evaluation in the forthcoming Workforce & Education Asset Inventory. This section includes data on education levels, young professional population characteristics, college enrollment, and wages, highlighting the characteristics and size of the labor pool and workforce pipeline in the Greater Charlotte Region.

Infrastructure

A robust system of multimodal infrastructure provides the foundation upon which economic activity can occur in any community. Functioning and affordable roads, rail, airports, and utilities allow workers to reach their employers, goods and materials to be delivered to clients and factories, and machinery to operate. In this section, we examine road and rail access, commute patterns, airport traffic, electrical utility rates, and site availability.

Entrepreneurship & Innovation

Entrepreneurship and innovation are significant components of an economic system, producing new products and startup companies that are essential to a sustainable and growing community and major sources of new wealth generation. Major innovation hubs tend to integrate a range of economic activities, including university research, patenting, venture capital investment, commercialization, and startup formation. This section examines research activities, patents, startup growth, and the technology workforce in the Greater Charlotte Region.

Quality of Life

Maintaining and recruiting a quality workforce are important elements of economic development, as high-skill workers help attract companies to a region. Additionally, existing companies’ ability to retain and recruit workers is strongly influenced by the quality of life and cost of living within a region. This section includes data on cost of living, housing affordability, and crime. These are all important factors used by companies and workers to evaluate the quality of life in a community.

For some data points, we provide benchmark comparisons with other regions in the US: Phoenix, Chicago, Minneapolis - St. Paul, Denver, Atlanta, Dallas – Ft. Worth, and Kansas City. We also provide a US benchmark.

We pulled data for the largest geographic area available in each dataset. In some cases this was the Combined Statistical Area (an aggregation of Core-Based Statistical Areas (CBSA), which include Metropolitan Statistical Areas (MSAs) and Micropolitan Statistical Areas (MicroSAs)); others used the MSA (US Census defined urban regions based on counties); and a few datasets are only available for Principal City (the primary city in a MSA).

A list of geographies examined for every dataset can be found below, followed by definitions of benchmark geographies on the next page.

Geographic Availability of Data

Dataset	Geography Used
Educational Attainment	Combined Statistical Area
Young Professionals	Combined Statistical Area
College Enrollment	Combined Statistical Area
Wage Competitiveness	Greater Charlotte Region
Race & Ethnicity	Combined Statistical Area
Foreign-Born Population	Combined Statistical Area
Traffic Congestion	Metropolitan Statistical Area
Electric Costs	Principal City
Small Business Growth	Combined Statistical Area
Technology Workforce	Metropolitan Statistical Area
Patents	Combined Statistical Area
Quality of Life	Principal City
Cost of Living	Principal City
Crime	Principal City

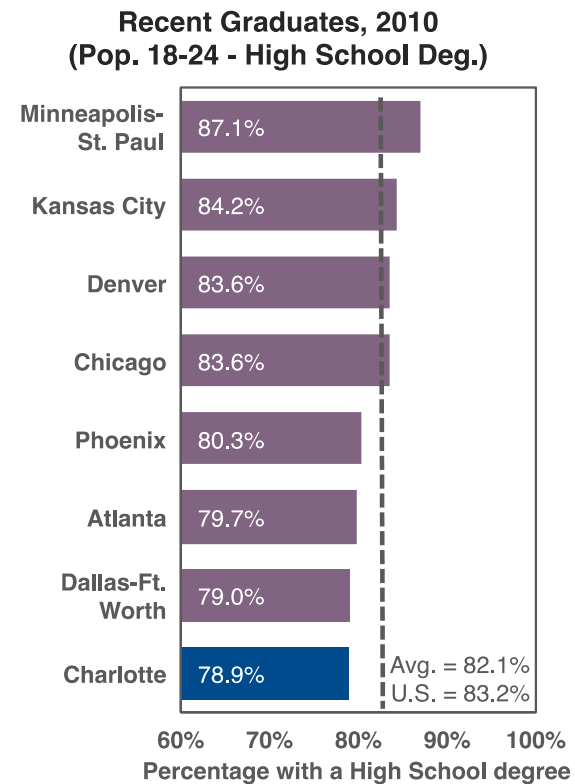
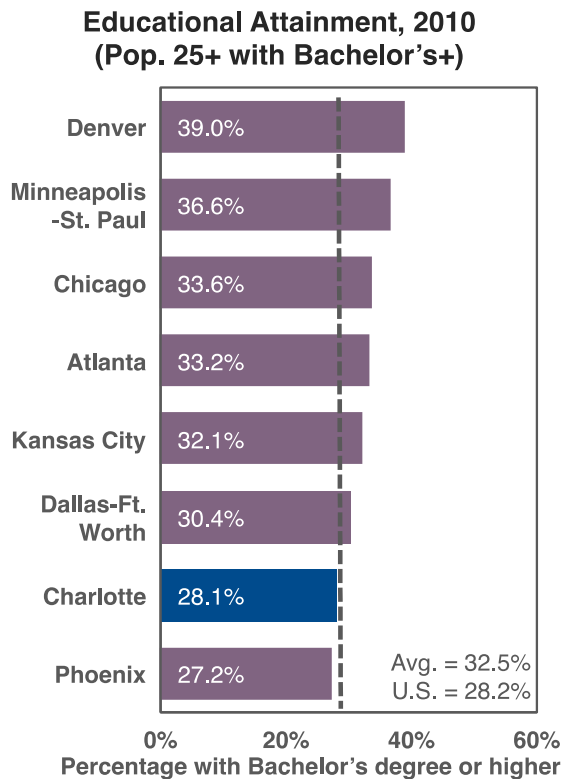
Official Definitions of Benchmark Geographies

CSA Code	CSA Name	CBSA Code	CBSA Name	Principal City
122	Atlanta-Sandy Springs-Gainesville, GA-AL CSA	12060	Atlanta-Sandy Springs-Marietta, GA MSA	Atlanta, GA
		16340	Cedartown, GA MicroSA	
		23580	Gainesville, GA MSA	
		29300	LaGrange, GA MicroSA	
		45580	Thomaston, GA MicroSA	
		46740	Valley, AL MicroSA	
172	Charlotte-Gastonia-Salisbury, NC-SC CSA	16740	Charlotte-Gastonia-Rock Hill, NC-SC MSA	Charlotte, NC
		16900	Chester, SC MicroSA	
		29580	Lancaster, SC MicroSA	
		30740	Lincolnton, NC MicroSA	
		41580	Salisbury, NC MicroSA	
		43140	Shelby, NC MicroSA	
		44380	Statesville-Mooresville, NC MicroSA	
176	Chicago-Naperville-Michigan City, IL-IN-WI CSA	16980	Chicago-Joliet-Naperville, IL-IN-WI MSA	Chicago, IL
		28100	Kanakee-Bradley, IL MSA	
		33140	Michigan City-La Porte, IN MSA	
206	Dallas-Fort Worth, TX CSA	19100	Dallas-Fort Worth-Arlington, TX MSA	Dallas, TX
		11980	Athens, TX MicroSA	
		14300	Bonham, TX MicroSA	
		23620	Gainesville, TX MicroSA	
		24180	Granbury, TX MicroSA	
		33420	Mineral Wells, TX MicroSA	
		43300	Sherman-Denison, TX MicroSA	
216	Denver-Aurora-Boulder, CO CSA	19740	Denver-Aurora-Broomfield, CO MSA	Denver, CO
		14500	Boulder, CO MSA	
		24540	Greeley, CO MSA	
312	Kansas City-Overland Park-Kansas City, MO-KS CSA	28140	Kansas City, MO-KS	Kansas City, MO
		11860	Atchison, KS MicroSA	
		47660	Warrensburg, MO MicroSA	
378	Minneapolis-St. Paul-St. Cloud, MN-WI CSA	33460	Minneapolis-St. Paul-Bloomington, MN-WI MSA	Minneapolis, MN
		22060	Fairbault-Northfield, MN MicroSA	
		26780	Hutchinson, MN MicroSA	
		39860	Red Wing, MN MicroSA	
		41060	St. Cloud, MN MSA	
n/a	n/a	38060	Phoenix-Mesa-Glendale, AZ MSA	Phoenix, AZ

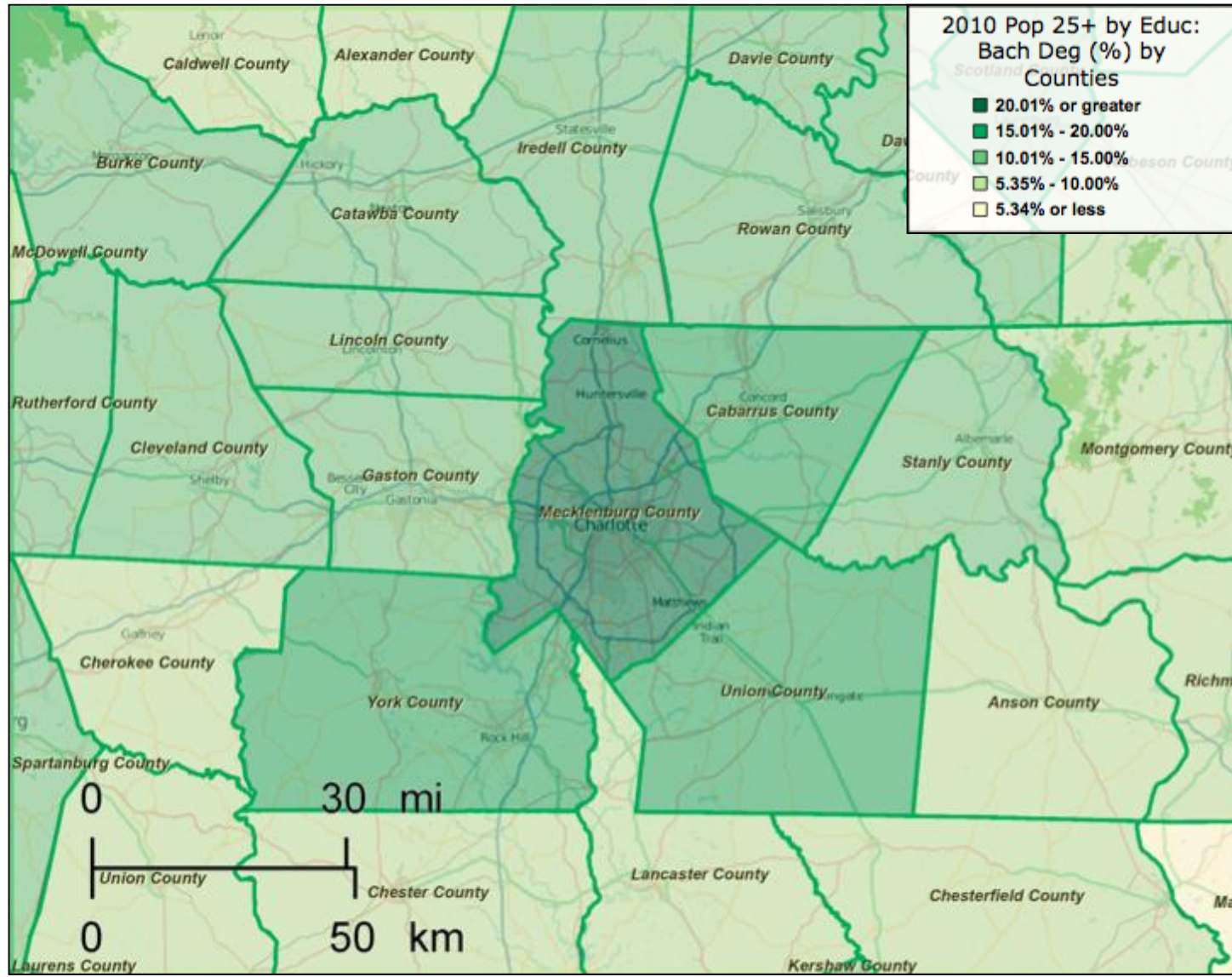
Workforce & Education

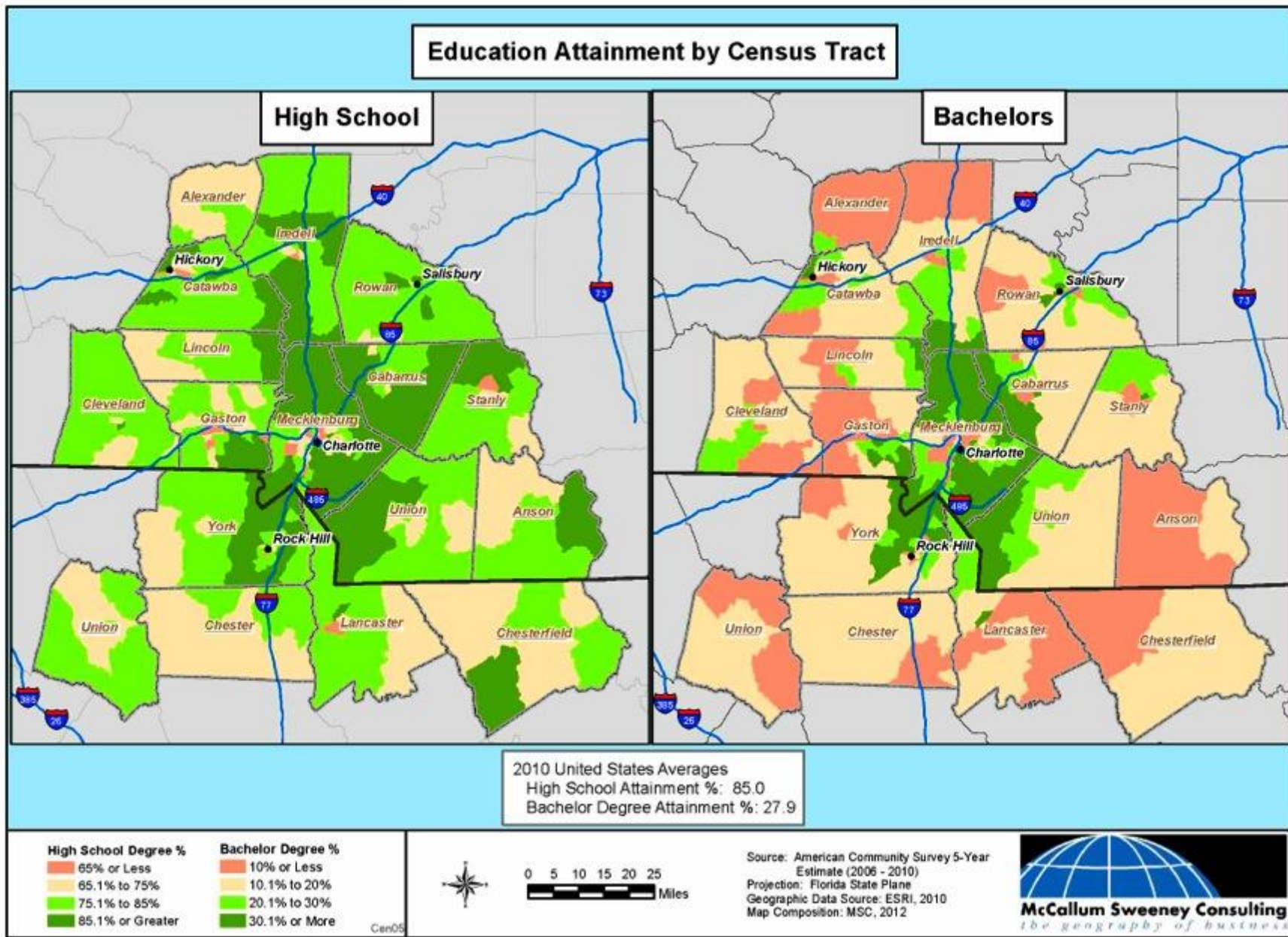
Educational Attainment

The Charlotte CSA has education levels on par with the US average but below the benchmark average. 28% of Charlotte adult residents have a bachelor’s degree or higher compared to 28% in the US and 33% on average among benchmark cities. Only 79% of residents aged 18 to 24 in Charlotte have a high school degree or equivalent, less than the US average of 83% and the benchmark average of 82%.



Greater Charlotte Region - Residents with a Bachelor's Degree

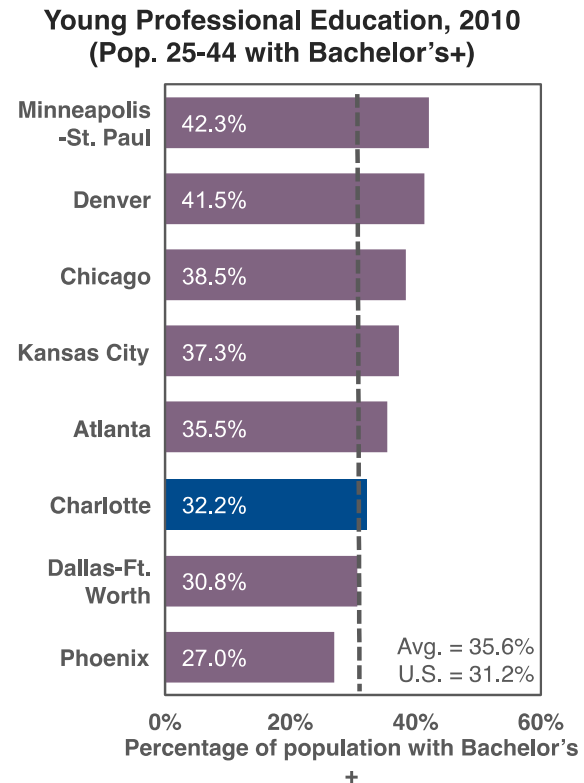
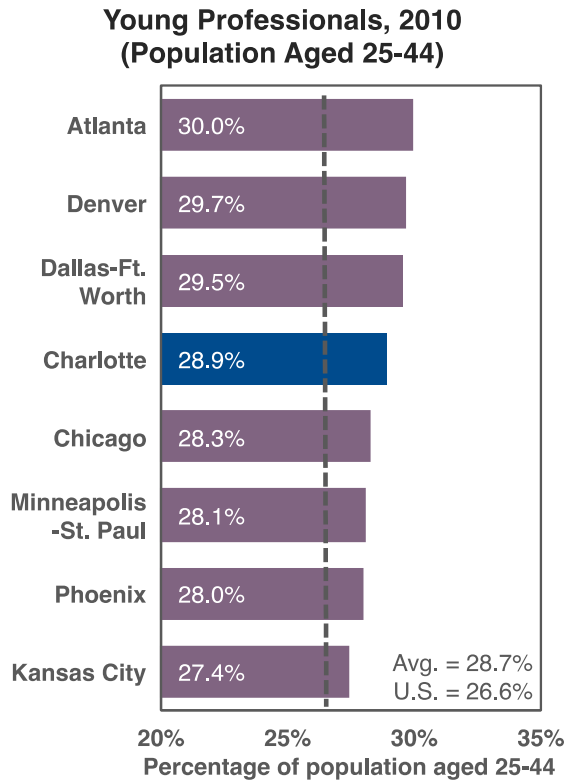




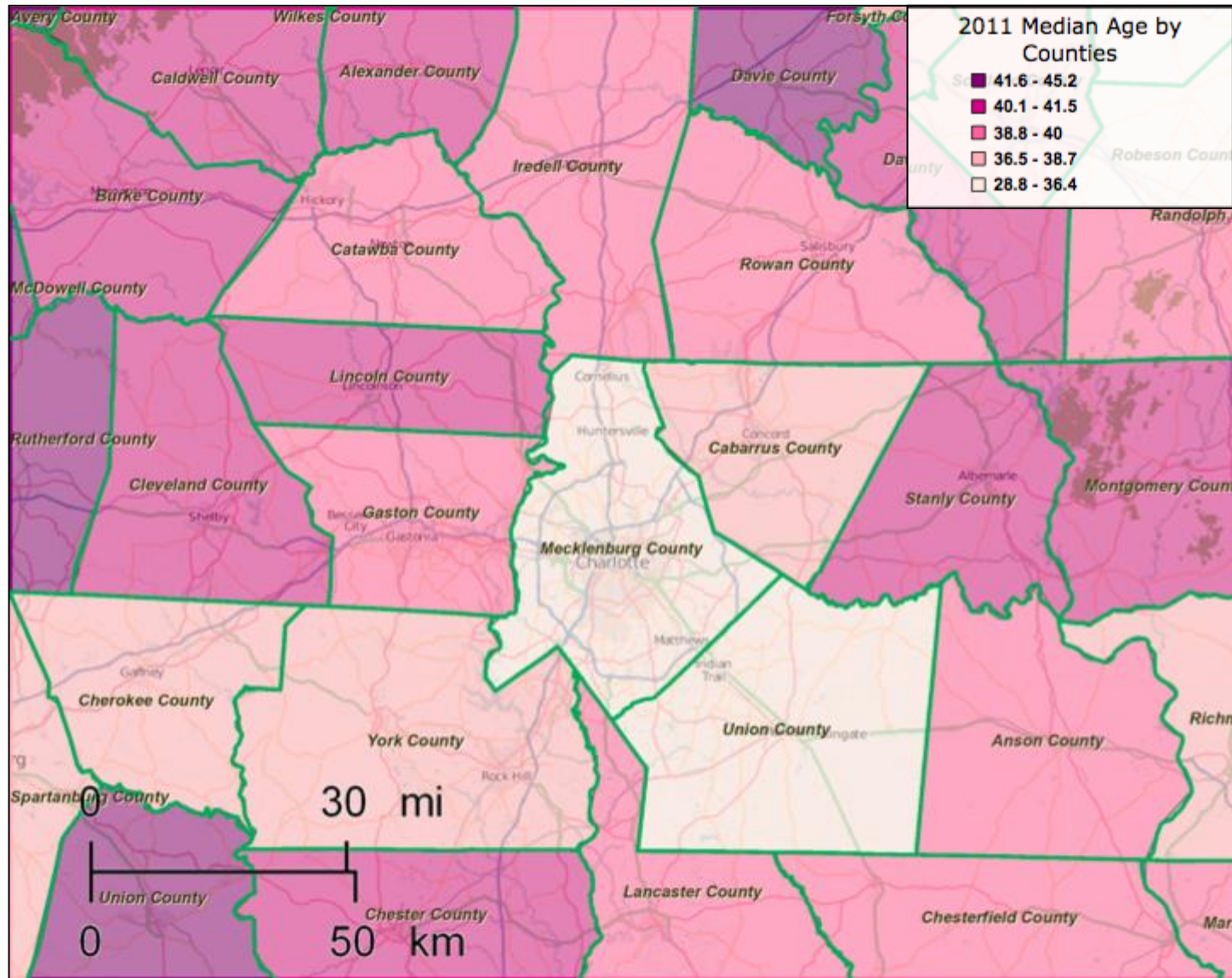
Young Professionals

Young professionals, residents aged 25 to 44, make up a relatively large share of Charlotte’s population (29%). Among the benchmark cities, only Atlanta, Dallas-Ft. Worth, and Denver have a larger share of young professionals than Charlotte. The US and benchmark averages are 27% and 29%, respectively.

The young professional population in Charlotte is better educated than the US average but less than the benchmark average. Among young professionals in Charlotte, 32% have a bachelor’s degree or higher, compared to 31% in the US and 36% among benchmarks.



Greater Charlotte Region – Median Age



College Enrollment

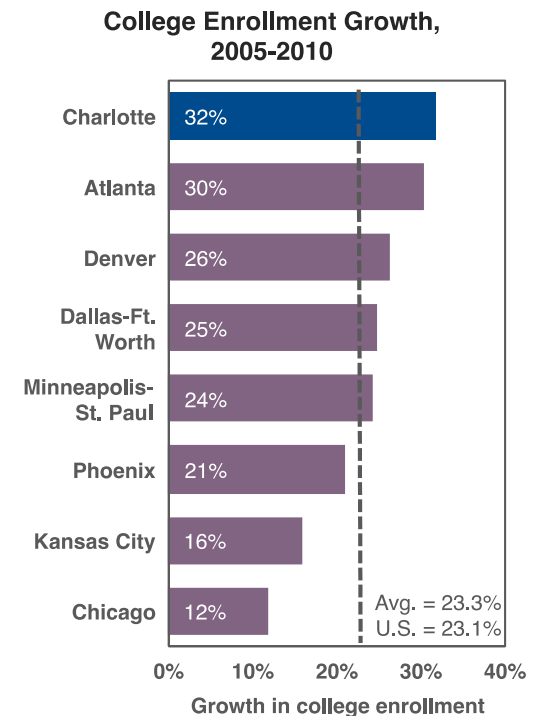
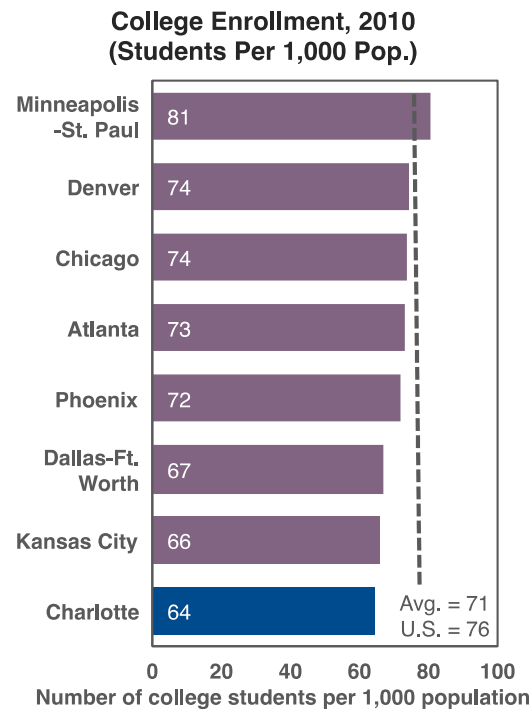
The Charlotte CSA has a smaller college student population than benchmark cities, but the number of college students is growing more rapidly. With 64 out of 1,000 residents enrolled in college, Charlotte has the smallest college student population among benchmarks.

The number of enrolled college students in Charlotte grew 32% between 2005 and 2010, faster than 23% growth in college students nationally.

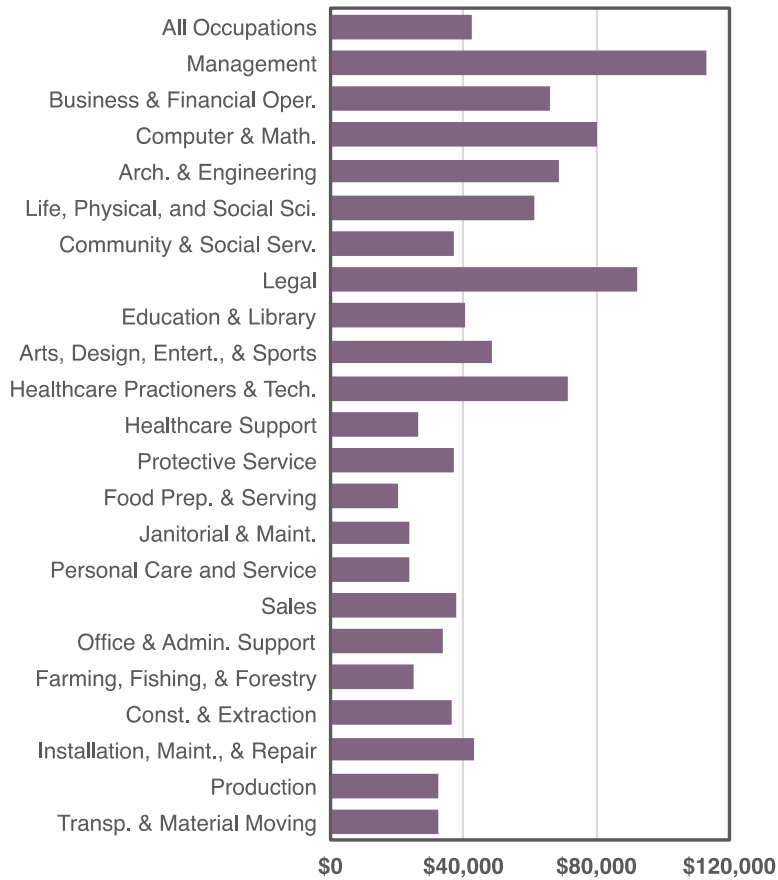
Wage Competitiveness

Overall wage levels in Charlotte are only slightly below US levels, but wage levels are higher in management, computers, sales, and office positions. The average wage of \$42,800 for all occupations is only 1% less than the US. The occupations with wages above US levels are Management (+10%); Computer and Math (+4%); Healthcare Practitioners and Technicians (+2%); Sales (+5%); Office and Administrative Support (+1%); Farming, Fishing, and Forestry (+10%); and Installation, Maintenance, and Repair (+2%).

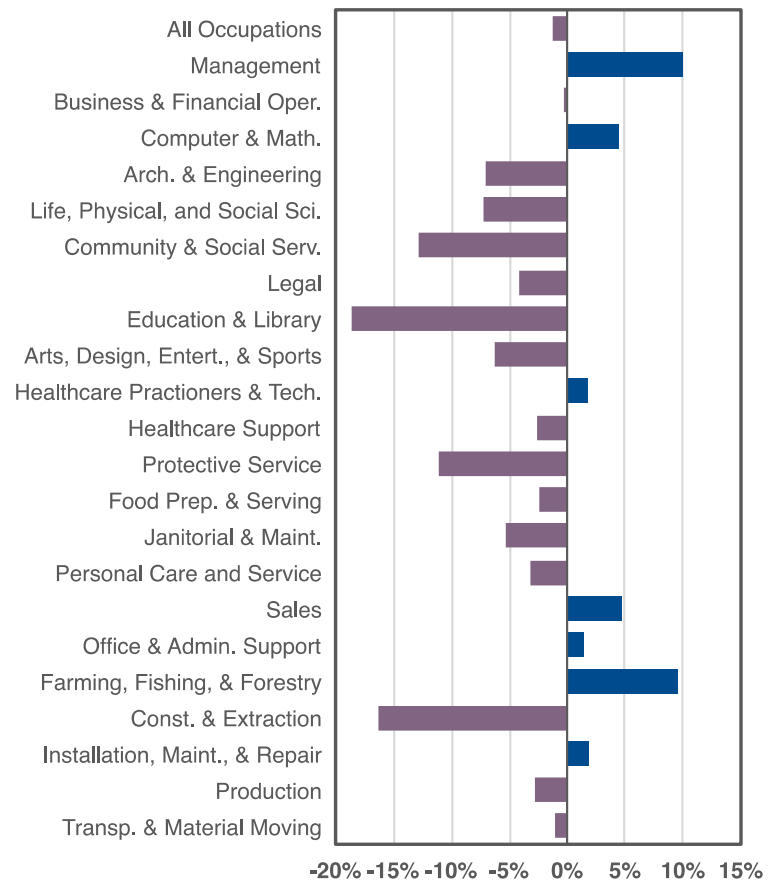
Wages are most significantly below US levels in Education and Library occupations (-19%) and Construction and Extraction occupations (-16%). Business and Financial occupations in Charlotte have the same average wages as the US.



**Wages by Occupation, 2010
Greater Charlotte Region**

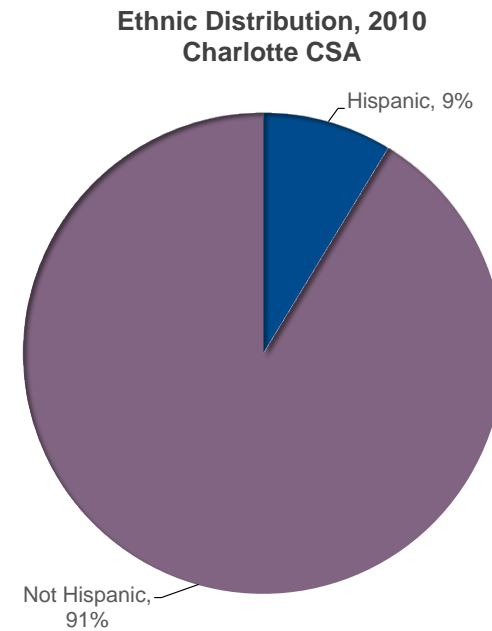
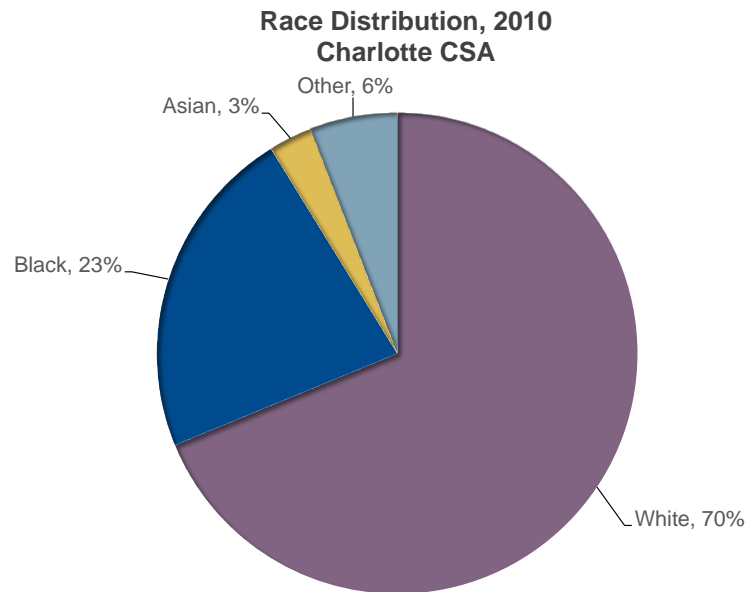


**% of U.S. Wages by Occupation, 2010
Greater Charlotte Region**



Race and Ethnicity

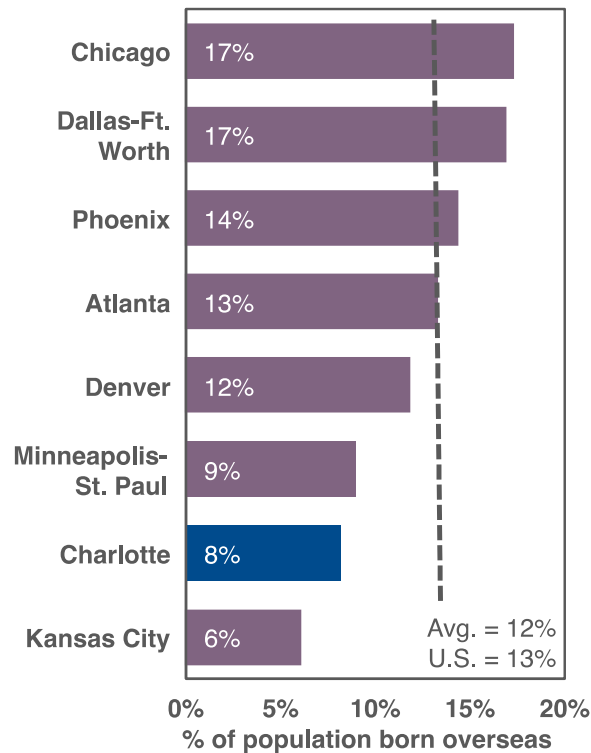
In 2010, the Charlotte CSA’s population was 70% white, 23% black, 3% Asian, and 6% other races. The white population percentage declined slightly from 74% of the population in 2005. During the same time period, the Hispanic population increased from 1% of the total population to 9%.



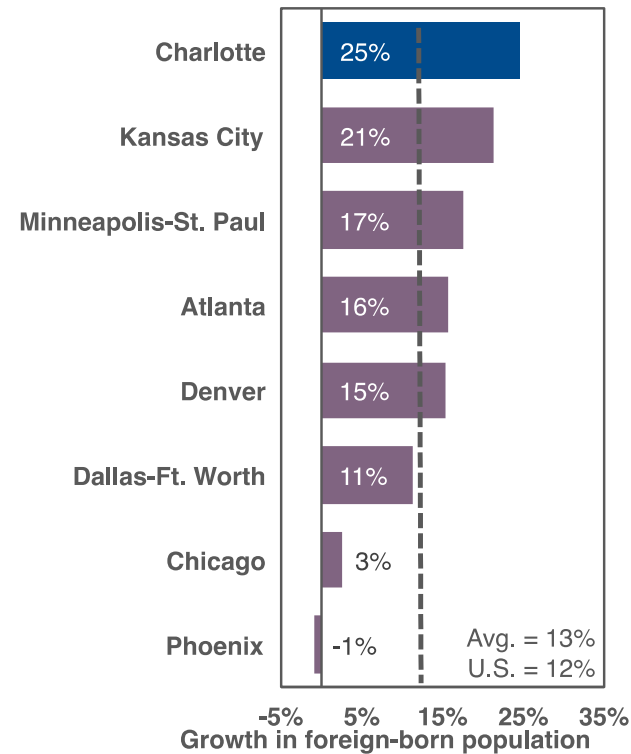
Foreign-Born Population

The Charlotte CSA has a smaller foreign-born population than benchmark cities and the US average, but this population is growing more quickly than other cities. Foreign-born residents comprise 8% of the Charlotte population, compared to 13% of the US. This population grew 25% in Charlotte from 2005 to 2010.

Foreign-Born Population, 2010



Foreign-Born Population Growth, 2005-2010



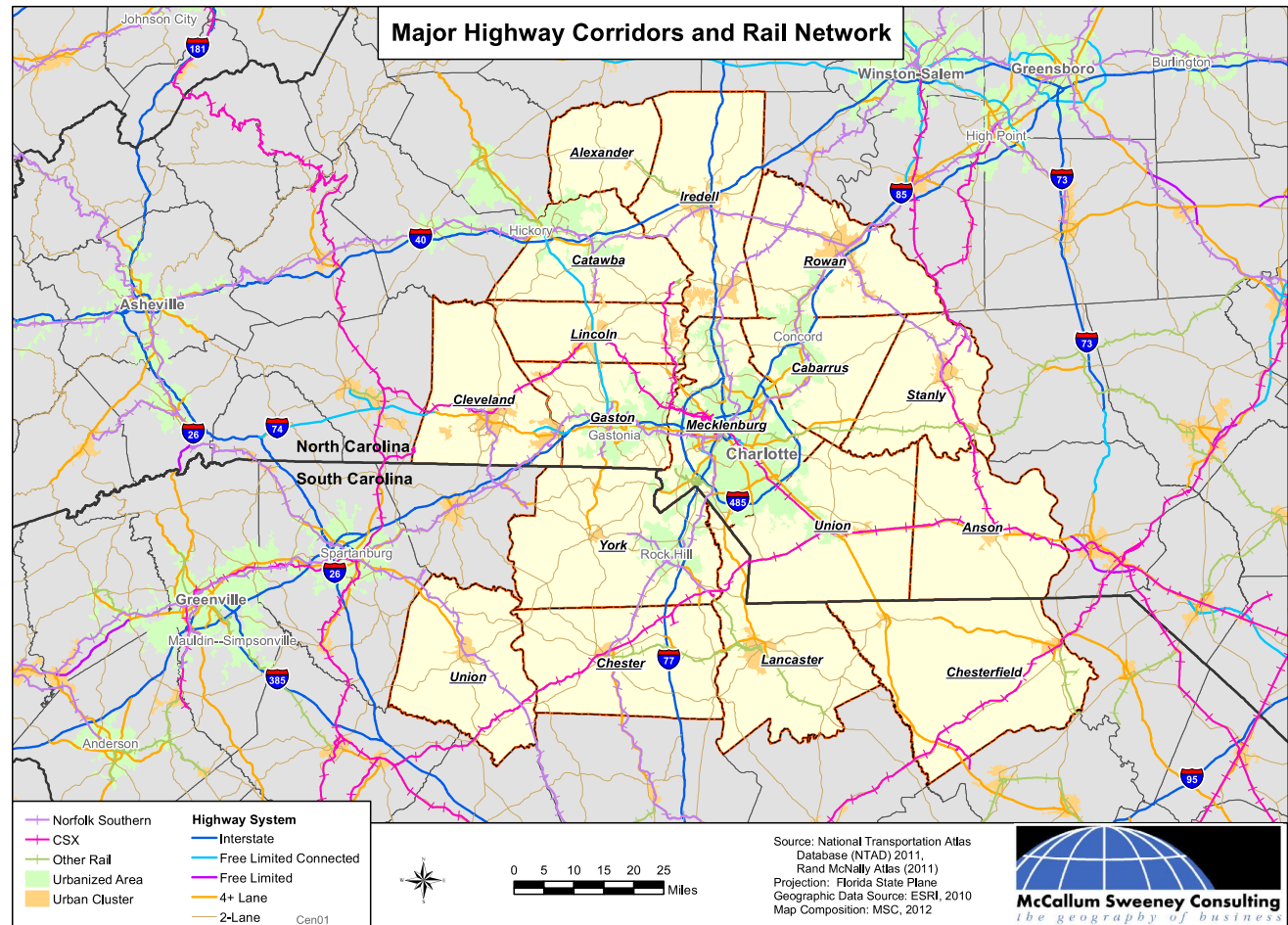
Infrastructure

Highways and Rail

Charlotte sits at the intersection of three interstate highways and six rail lines, providing land distribution access in all directions. Interstates I-77, I-84, and I-40 all move through the region, supporting over 300 trucking firms.

CSX and Norfolk Southern are the primary rail service providers in the region, but lines are also maintained by Alexander, Winston Salem Southbound, Lancaster & Chester, and Aberdeen Carolina & Western railways.

The region's current intermodal facility is being relocated and expanded by Norfolk Southern at Charlotte Douglas International Airport. The \$92 million facility will significantly expand capacity for distribution and the transfer of goods between rail, highways, air, and connected seaports in Charleston, Savannah, and Norfolk.

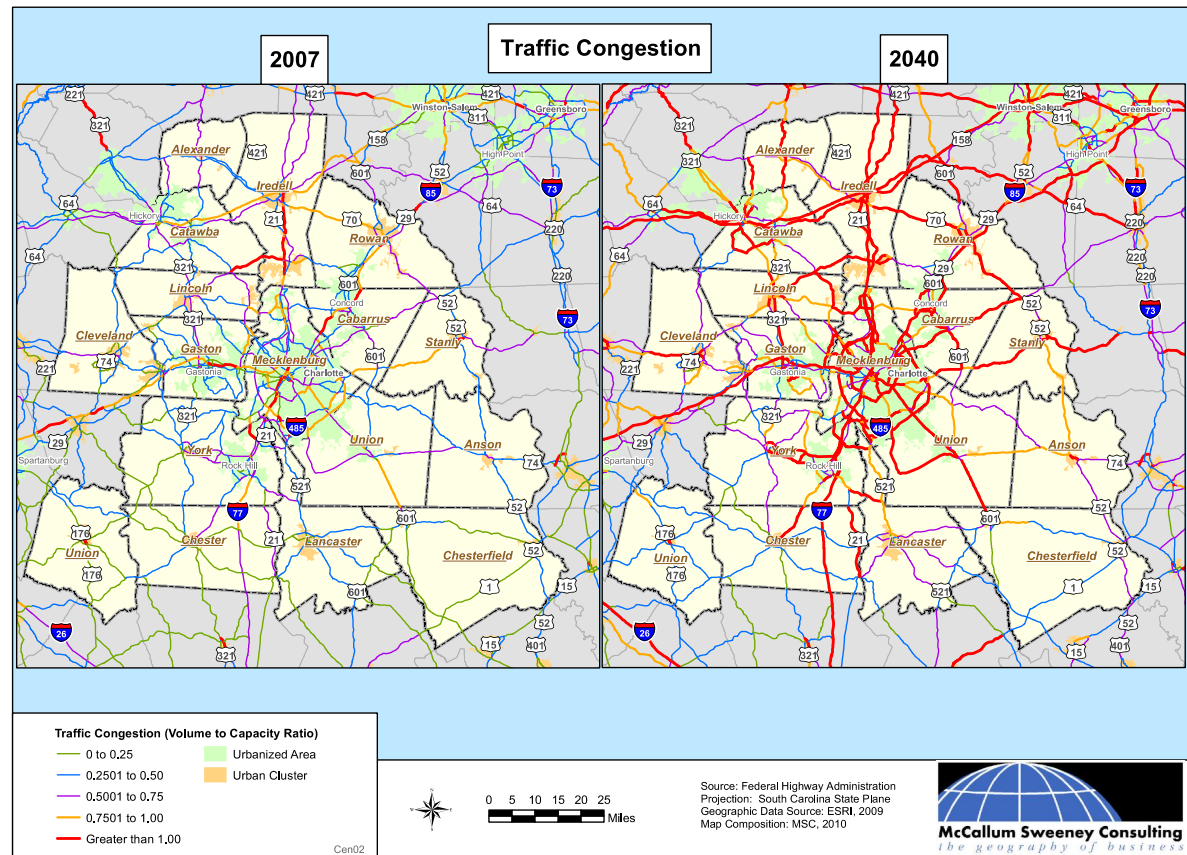
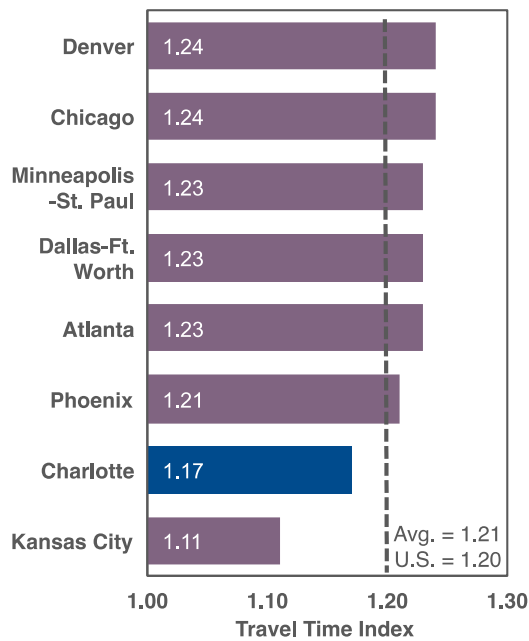


Traffic Congestion

Charlotte has relatively low traffic congestion. The Travel Time Index measures the relative length of commutes during peak traffic hours versus off-peak hours (for example, a Travel Time Index of 1.3 indicates that a drive of 10 minutes during off-peak hours will take 13 minutes during peak traffic). Charlotte received a Travel Time Index rating of 1.17, below the average for all US urban areas of 1.20 and the benchmark average of 1.21.

Traffic congestion in the region is expected to get worse as high population growth forecasts will further boost commuter traffic (see map below).

Traffic Congestion, 2011



Commute Patterns

Over half of all workers in the Greater Charlotte Region commute to a different county for work every day. The overall region has a resident workforce of 1,005,000 workers and a daytime workforce of 1,007,000.

Only two counties in the region have a larger daytime workforce than resident workforce: Mecklenburg County and Cabarrus County, which see a 39% and a 20% change in their worker population daily.

All other counties are net exporters of workers, with Chester County and Lincoln County sending the largest share of their residents to other counties for work at 72% and 75%, respectively.

Commute Patterns

Greater Charlotte Region

County	Resident Workforce	Daytime Workforce	Net Change	Net % Change	Workers Commuting In	% of Daytime Workforce	Residents Commuting Out	% of Resident Workforce
Alexander County, NC	14,437	7,978	-6,459	-45%	3,605	45%	10,064	70%
Anson County, NC	9,032	6,023	-3,009	-33%	3,056	51%	6,065	67%
Cabarrus County, NC	67,927	54,961	-12,966	-19%	33,468	61%	46,434	68%
Catawba County, NC	59,765	71,979	12,214	20%	38,452	53%	26,238	44%
Cleveland County, NC	35,687	30,049	-5,638	-16%	14,060	47%	19,698	55%
Gaston County, NC	85,974	62,150	-23,824	-28%	29,389	47%	53,213	62%
Iredell County, NC	60,224	54,980	-5,244	-9%	27,866	51%	33,110	55%
Lincoln County, NC	29,416	17,878	-11,538	-39%	10,409	58%	21,947	75%
Mecklenburg County, NC	344,015	479,400	135,385	39%	244,676	51%	109,291	32%
Rowan County, NC	51,108	41,621	-9,487	-19%	20,694	50%	30,181	59%
Stanly County, NC	23,909	16,161	-7,748	-32%	6,732	42%	14,480	61%
Union County, NC	70,997	48,873	-22,124	-31%	25,839	53%	47,963	68%
Chester County, SC	12,565	7,455	-5,110	-41%	3,933	53%	9,043	72%
Chesterfield County, SC	16,190	13,332	-2,858	-18%	6,405	48%	9,263	57%
Lancaster County, SC	25,356	15,492	-9,864	-39%	7,841	51%	17,705	70%
Union County, SC	11,215	6,646	-4,569	-41%	2,883	43%	7,452	66%
York County, SC	87,194	72,142	-15,052	-17%	32,708	45%	47,760	55%
Greater Charlotte Region	1,005,011	1,007,120	2,109	0%	512,016	51%	509,907	51%

Source: US Census, LEHD

The table below compares worker’s place of residence to place of employment. Each box indicates the number of workers that live in the county listed on the left (Place of Residence) and work in the county above (Place of Employment).

For example, in the first column and row, we see that 4,373 workers live in Alexander County and also work in Alexander County. The box to the right shows that 9 workers live in Alexander County and work in Anson County.

The Greater Charlotte Region has over 802,000 workers who both live and work in the region. Because we know the region’s resident workforce and daytime workforce are both over 1,000,000, this indicates that approximately 200,000 residents commute to jobs outside the Greater Charlotte Region every day, and another 200,000 workers commute from outside the region to local jobs.

Where Residents Work

Greater Charlotte Region

		↓ Place of Employment ↓																	
		Alexander County	Anson County	Cabarrus County	Catawba County	Cleveland County	Gaston County	Iredell County	Lincoln County	Mecklenburg County	Rowan County	Stanly County	Union County	Chester County	Chesterfield County	Lancaster County	Union County, SC	York County	Greater Charlotte
Place of Residence ↓	Alexander County	4,373	9	59	4,012	77	105	1,518	106	520	88	20	64	-	-	-	-	12	10,963
	Anson County	1	2,967	183	24	20	34	49	18	995	127	252	1,557	1	133	6	-	11	6,378
	Cabarrus County	22	93	21,493	517	261	762	1,378	181	26,453	3,013	847	1,358	13	14	43	3	195	56,646
	Catawba County	1,049	14	506	33,527	316	818	2,598	1,895	4,703	485	77	271	5	5	3	5	65	46,342
	Cleveland County	40	12	222	979	15,989	4,507	228	632	2,482	225	63	273	7	2	7	18	263	25,949
	Gaston County	59	68	1,215	1,750	2,878	32,761	991	2,045	25,757	776	142	748	14	27	86	3	2,077	71,397
	Iredell County	545	28	1,808	2,357	206	588	27,114	494	11,111	1,864	84	374	2	3	15	3	100	46,696
	Lincoln County	17	27	419	3,355	638	2,736	754	7,469	8,455	262	39	218	2	9	12	1	227	24,640
	Mecklenburg County	58	288	9,767	2,024	1,264	6,542	4,887	1,394	234,724	2,142	693	8,011	105	134	1,385	18	7,781	281,217
	Rowan County	32	35	5,662	459	229	574	2,693	209	6,856	20,927	638	358	2	8	11	1	58	38,752
	Stanly County	4	315	1,994	67	45	76	116	51	3,921	871	9,429	1,027	2	43	22	-	35	18,018
	Union County	11	531	1,418	377	252	621	502	130	31,013	364	357	23,034	39	347	516	1	1,011	60,524
	Chester County	-	5	22	20	49	133	13	19	1,230	14	1	53	3,522	29	609	127	2,935	8,781
	Chesterfield County	-	225	42	12	4	48	30	7	741	7	16	1,168	49	6,927	309	14	461	10,060
	Lancaster County	1	55	65	18	14	48	36	7	5,000	19	26	1,146	743	463	7,651	19	3,281	18,592
	Union County, SC	-	5	17	14	49	85	16	17	337	7	4	30	125	26	79	3,763	291	4,865
	York County	6	30	406	258	450	2,497	250	113	24,490	124	17	900	1,222	168	1,911	138	39,434	72,414
	Greater Charlotte	6,218	4,707	45,298	49,770	22,741	52,935	43,173	14,787	388,788	31,315	12,705	40,590	5,853	8,338	12,665	4,114	58,237	802,234

Source: US Census, LEHD

Air Service

Charlotte Douglas International Airport is one of the nation's largest and busiest airports, offering nonstop service to over 130 destinations and over 700 daily flights. The construction of a new intermodal distribution facility adjacent to the airport will serve to further increase the cargo traffic and better integrate the regional distribution network of rail, highway, and air with regional seaports.

CHARLOTTE DOUGLAS INTERNATIONAL AIRPORT (CLT)

Key Statistics, 2011:

Annual Air Traffic:	540,000
Air Traffic Rank:	6th
Passengers:	39 mil.
Passenger Airport Rank:	11th
Landed Cargo:	398 mil. lbs.
Cargo Airport Rank:	54 th
Daily Flights:	700+
Nonstop Destinations:	130+

Key Nonstop Int'l Destinations:

- Frankfurt
- London
- Paris
- Rome
- Munich
- Toronto
- Mexico City
- Rio de Janeiro

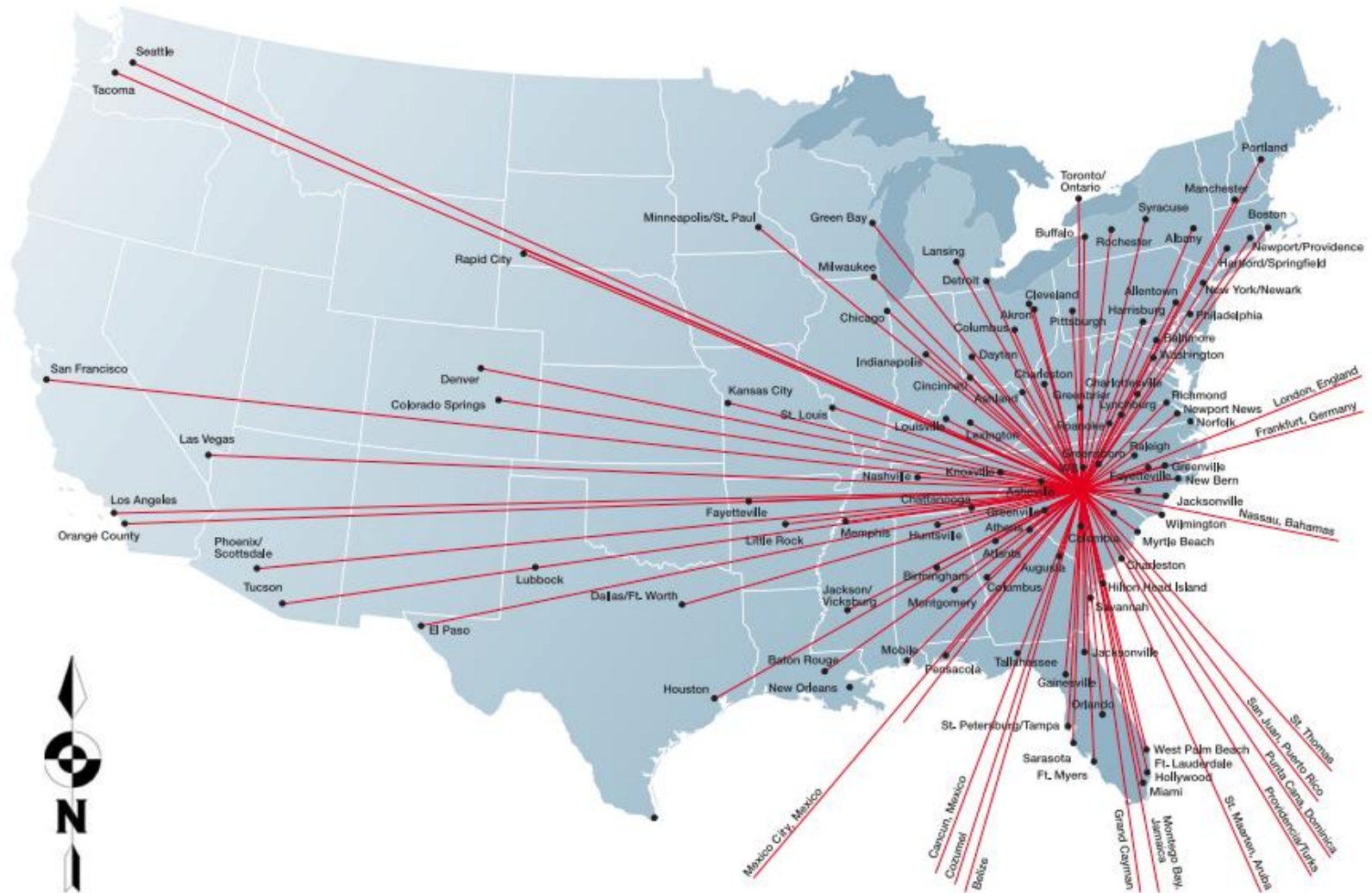
Major Airlines:

- US Airways
- American Airlines
- Air Canada
- AirTran Airways
- Continental Airlines
- Delta Airlines
- Jetblue Airways
- Lufthansa German Airlines
- Northwest Airlines
- United Airlines

Key Airport Features:

- **2010 Eagle Award:** This award from the International Air Transport Association recognizes the Best Airport. Charlotte Douglas International Airport was recognized for quality service and value for customers.
- **CLT 2015 Plan:** This expansion plan includes 7,000 new parking spaces, expansion of the departures and arrivals areas, and a new terminal roadway.
- **US Airways Hub:** Charlotte Douglas International Airport is US Airways' largest hub and is the second largest airport on the east coast.
- **Intermodal Facility:** Norfolk Southern is working to complete a new \$92 million intermodal facility adjacent to the airport that will allow for increased distribution of goods along rail, highway, air, and sea lines.

Charlotte Douglas International Airport – Nonstop Destinations, 2010



Charlotte Regional Partnership Research Department: October 2010

Electric Costs

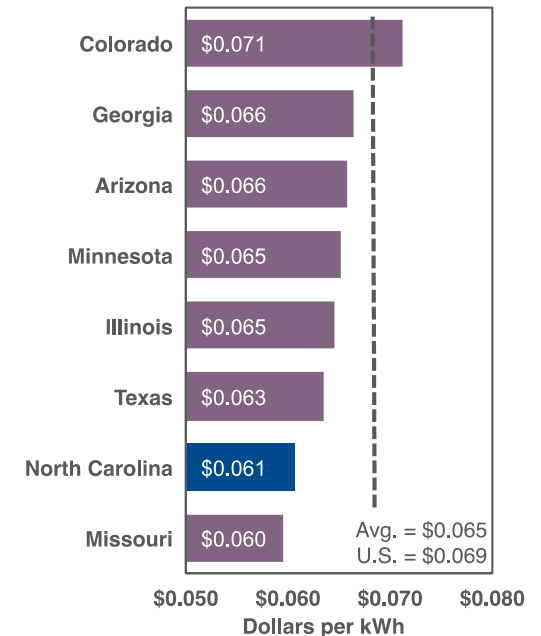
North Carolina has electricity rates significantly below US and benchmark state averages. The average cost of electricity in North Carolina is \$0.061 per kWh, compared to \$0.069 in the US and \$0.065 among benchmark states. Only Missouri had electricity rates below North Carolina among benchmarked states.

Industrial Site Availability

According to McCallum Sweeney Consulting, “One of the fastest growing trends in the site location business is the demand for project-ready industrial sites. The reason for this is simple: The location decision process demands available sites and those sites need to be ready for development. Companies looking to build new facilities want sites that are served with adequate infrastructure, properly zoned, and relatively risk free. Today, industry site decision time frames are shrinking. Many companies have been delaying much-needed expansions, waiting for signs of economic recovery. That moment is beginning to emerge, and demand is increasing for project-ready sites and ready-to-lease buildings. Companies are not willing to wait for a community to find an appropriate site and determine its suitability for development – that due diligence needs to be done before the prospect comes calling.” (McCallum Sweeney Consulting, 2012)

In terms of shovel-ready sites in the region (see box on next page on what a shovel-ready site is), as well as existing buildings, there are notably good examples, but it is relegated to a few regions and offers a limited range of choices for would-be industrial prospects. More to the point, the available shovel-ready sites are very good, but there are simply not enough of them. Building availability, regardless of the region, is never diverse enough. This is not a strategic flaw on the part of the various economic development organizations in the region; instead, it is function of two factors. It is either a lack funding for spec buildings, or the appropriateness of existing real estate stock. So, the community is faced with a decision that is difficult to assess and certainly not simple: to build or not to build a spec building. Today, prospects will consider looking at an existing building due to project scheduling constraints regardless of whether the community is a good fit or not. In short, the community is sometimes included by default; and, but for having an existing building, they would have never been considered. A trend that has been tried by some communities that has been successful is the idea of a “virtual spec building” (VSB). A VSB is one where the design has been completed for a specific use (or multiple uses), with

Cost of Electricity, 2011
(\$ Per kWh for Industrial Users)



cost and scheduling already in place, coupled with a debottlenecking exercise to significantly reduce construction time. If done correctly, the schedule for a VSB should be fairly close to the schedule of a retrofit of an existing building or up-fit of a partially completed spec building.

What is “Shovel Ready”?

© McCallum Sweeney Consulting, Inc.

There is no one single definition of a project-ready site, and there are varying degrees of readiness. In addition, what one industry may require in a site might not be relevant for another industry. Generally speaking, however, a project-ready site must have the following characteristics:

1. The site is available.

This means that the site is truly for sale, preferably with established terms and conditions. This does not necessarily mean that communities should expend their capital buying pieces of property to ensure that they are available for prospects, although that is the most ideal situation. An acceptable alternative would be long-term, renewable, assignable option agreements with landowners on key parcels.

2. The site is fully-served.

Ideally all utilities (water, sewer, electric, natural gas, etc.) are at the site with appropriate sizes and capacities. Short of that, the community should have developed detailed plans with service providers to extend and/or upgrade utilities. These plans should include appropriate rights-of-way studies and detailed cost and schedule estimates.

3. The site is developable.

Sites that are developable have no significant easements or right-of-ways impinging on the development, and they have all necessary due diligence (i.e. environmental assessments) completed; and any necessary mitigation completed. If there are utility easements on site, the community should be prepared to present detailed plans on the ability and willingness to move those utilities, providing details on cost and schedule.

Incentives

In general, the incentives in North Carolina are considered neither aggressive nor ineffective; instead, they are considered about middle of the road – with two notable exceptions. The first is an Achilles heel in the State of North Carolina – the size of the closing fund, currently in the \$54-60 million range. Competitor states are simple better positioned to compete for large projects: Georgia has \$100 million and Texas routinely has upwards of \$200 million.

The second issue is the inability of the Department of Commerce to sign Non-Disclosure agreements for highly confidential projects. This factor alone is a non-starter for virtually every major industry that wants to maintain a competitive advantage in the marketplace. McCallum Sweeney has personally witnessed literally billions of dollars in capital investment and multiple thousands of jobs look elsewhere for this reason alone. These two factors alone create a severe, almost impossible to overcome, disadvantage for rural regions of the state – which most of North Carolina is.

The tax climate in North Carolina is another factor that should be of concern for the Charlotte region. In the Tax Foundation’s “State Business Climate Index” the state does not fare well. North Carolina was ranked 44th in the Nation. Rankings of note are as follows:

State Business Tax Climate Ranking

Corporate Tax		29
Individual Income Tax		43
Sales Tax		47
Unemployment Insurance Tax		7
Property Tax		35

In our opinion this ranking is unfair and overstates the dramatic difference of North Carolina compared to other regions. Nevertheless, the data is in the Public Domain and is widely circulated and accepted. The region can best counter this by making sure that actual pro-forma analyses are run with each and every project and constantly challenge the veracity of this information not only in project execution but also proactive marketing.

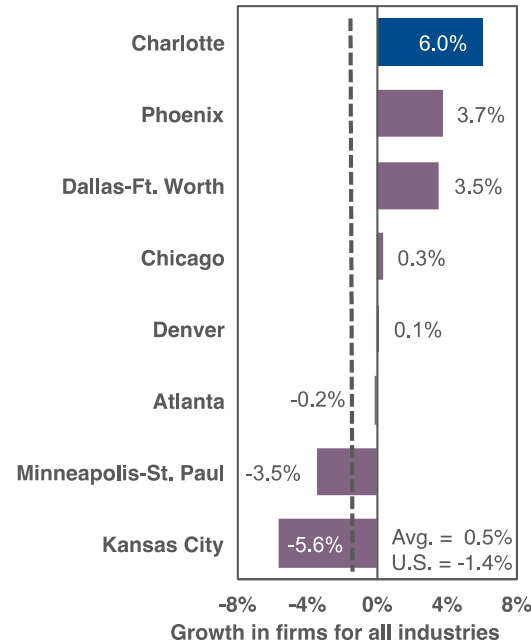
Entrepreneurship & Innovation

Small Business Growth Trends

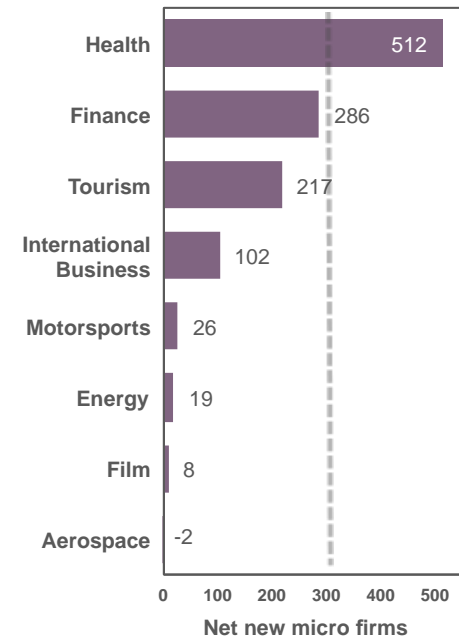
Micro firms (companies that employ less than 10 individuals) grew more quickly in the Charlotte Metro than all benchmark metros from 2005 to 2010. Charlotte created 1,800 net new micro firms during this period, growing 6%, while the number of micro firms in the benchmark cities grew only 0.5% and US micro firms declined -1.4%.

In Charlotte, many new micro firms were in targeted industries. The Health industry saw the net creation of 512 new small businesses in Charlotte. Finance had 286, Tourism had 212, and International Business (management and business firms) had 102. Only Aerospace saw a decrease in micro firms, but as an industry primarily comprised of large companies, this reflects a relatively small share of employment.

**Growth in Micro Firms, 2005-2010
(Fewer than 10 Employees)**



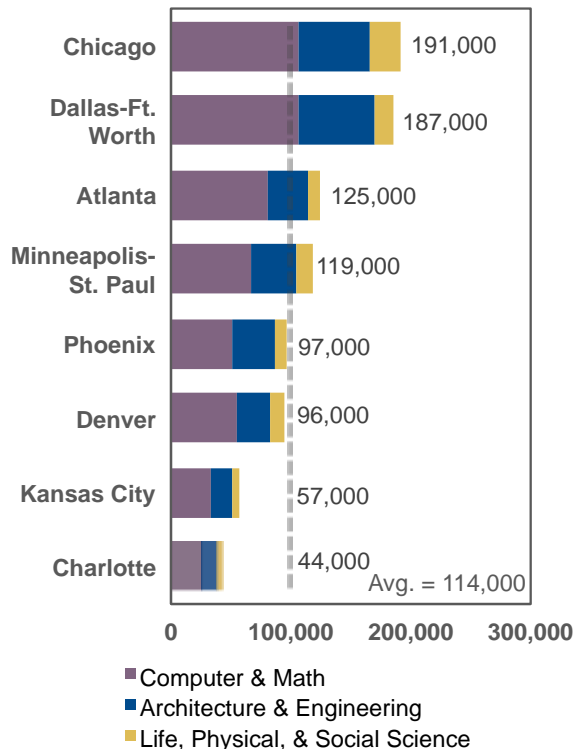
Net New Charlotte Micro Firms by Target Industry, 2005-2010



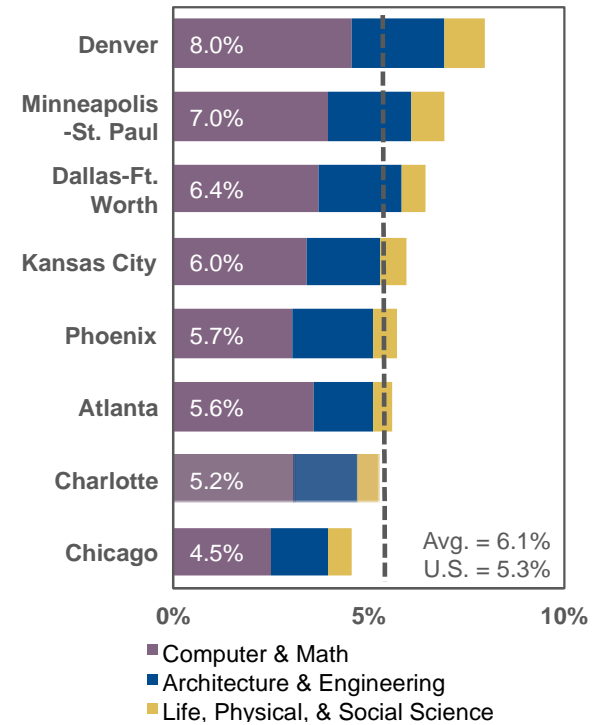
Technology Workforce

Charlotte has a relatively low total number and concentration of Science and Technology Workers. In this context, Science and Technology Workers are defined as those employed in Computer and Math; Architecture and Engineering; and Life, Physical, and Social Science occupations. With only 57,000 Science and Technology Workers, Charlotte has a concentration of 5.2%, just below the US average of 5.3% and the benchmark metro average of 6.1%.

Science & Technology Workers, 2010



Science & Technology Workers, 2010
(Percentage of Total Workforce)

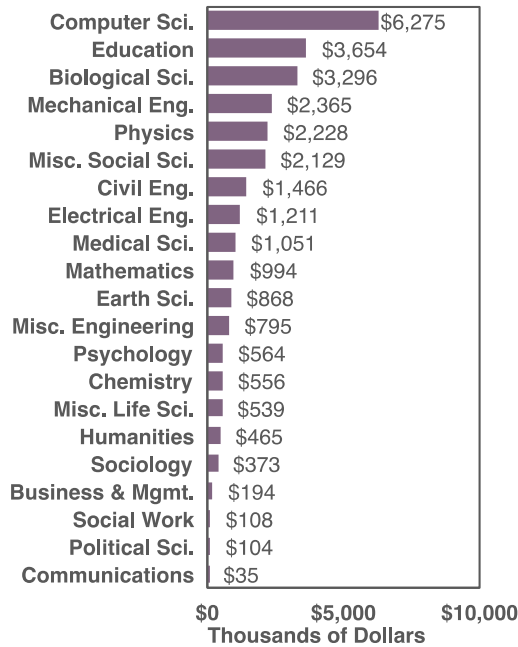


University R&D

Charlotte received a total of \$26,687,000 in university research funding in 2009 through Davidson College and UNC Charlotte, which received 93% of these funds. These overall research expenditures are well below many benchmark metros but have grown very rapidly, with funding rising 51% from 2004 to 2009.

Research funding at UNC Charlotte was distributed across 21 fields, with Computer Science receiving 21% of all funds, followed by Education with 12% and Biological Sciences with 11%.

UNC Charlotte - Research Funding by Field, 2009



RESEARCH STRENGTHS

Key Statistics:

Research Institutes:	14
Non-Faculty Staff:	100
Total Awards:	\$ 31.0 M
NSF Awards:	\$ 4.3 M
NIH Awards:	\$ 1.1 M

UNIVERSITY OF NORTH CAROLINA-CHARLOTTE

Key Strengths:

- Biotechnology
- Manufacturing
- Motorsports Engineering
- Optics
- Healthcare

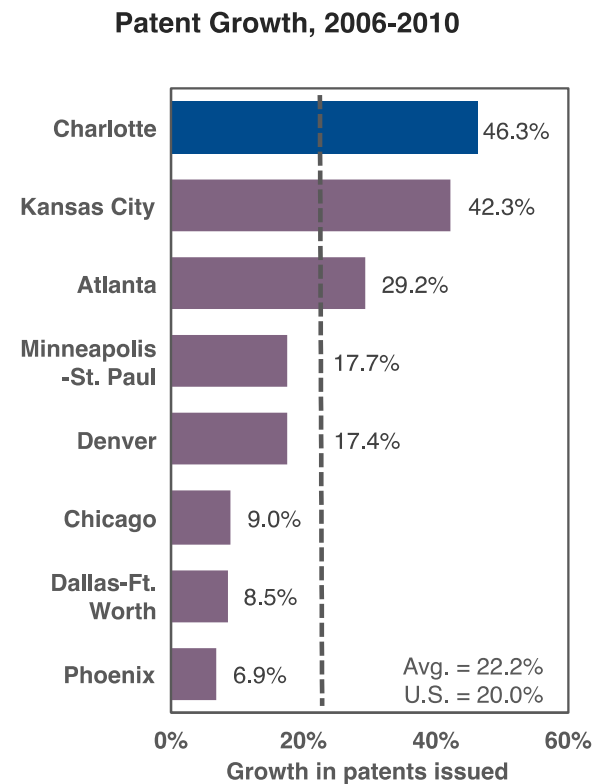
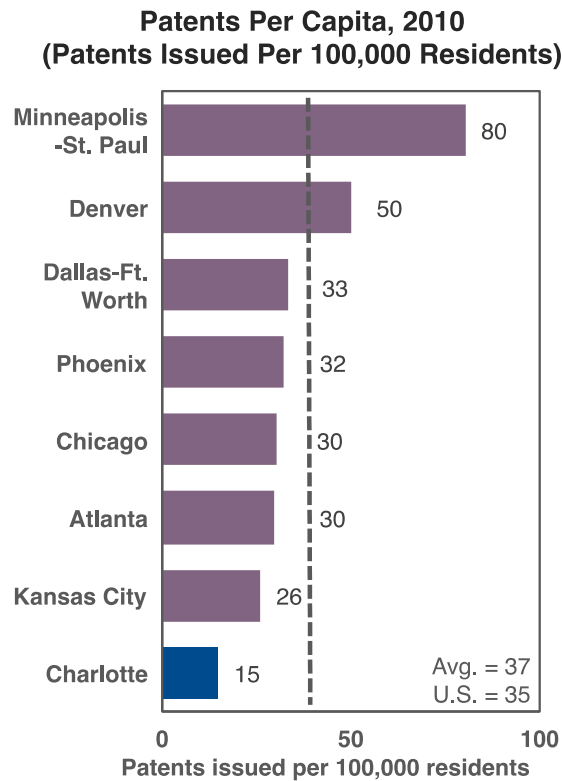
Corporate Partners:

- Bank of America
- US Army
- National Institute of Health
- National Science Foundation
- Cummins
- Caterpillar
- General Electric

Patents

Charlotte had the lowest number of patents issues per capita in 2010, but patents grew more quickly in Charlotte from 2006 to 2010 than the US and all benchmark cities. In 2010, Charlotte was issued only 15 patents per 100,000 residents, below the US and benchmark averages of 35 and 37.

The number of patents issued in Charlotte grew 46% from 2006 to 2010 compared to 20% patent growth across the US and an average of 22% among benchmarked metros.



RESEARCH & BUSINESS ORGANIZATIONS

UNCC AND THE GREATER CHARLOTTE REGION

Key Research Institutes:

- **Charlotte Research Institute (CRI):** The purpose of CRI is to help form partnerships between UNCC and private industry. CRI focuses on research in Precision Metrology, Visualization and Optoelectronics. CRI is building the \$37 Million PORTAL building.
- **Center for Optoelectronics and Optical Communications:** Provides infrastructure for student, faculty and industrial research in the fields of Optoelectronics and Optical Communications.
- **Center for Precision Metrology:** Association of faculty, students and industry that innovate within the field of Precision Metrology. Have received funding from multiple industry sources, as well as being initially funded by the National Science Foundation.
- **Charlotte Visualization Center:** Study is carried out on Interactive Visualization and Visual Analytics to solve a number of complex problems. Funding has been received from a number of government agencies as well as private sector parties.
- **Urban Institute:** Applied research and community outreach center, serving the Charlotte region by providing technical assistance and training related to urban issues.
- **Center for Transportation Policy Studies:** Research and study of transportation issues and transportation related policy.
- **Center for Biomedical Engineering Systems:** Provides infrastructure to enable biomedical faculty, researchers, clinicians, practitioners and students to collaborate on solving biomedical issues.

Key Entrepreneurship Organizations:

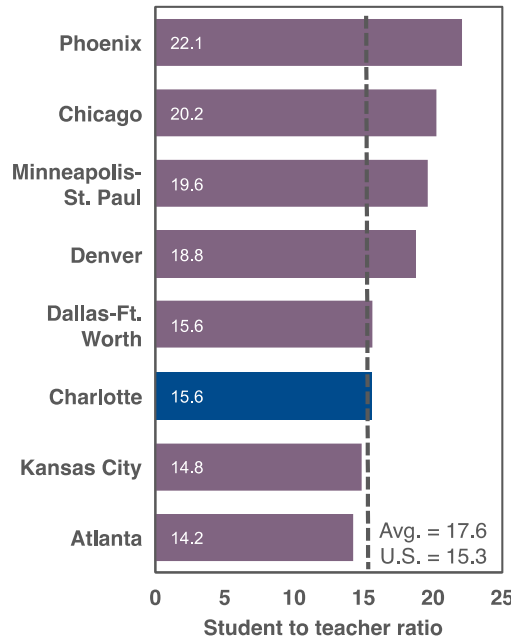
- **Business Link NC:** North Carolina Chamber of Commerce program to support small businesses.
- **Charlotte Business Resources:** Web-portal providing information to help new, existing, and relocating businesses.
- **Institute for Entrepreneurship:** Offers courses, seminars and business counseling through Central Piedmont Community College.
- **Packard Place:** Provides leasing and meeting space for startups and entrepreneurs.
- **Queen City Forward:** Provides resources and support for social ventures and entrepreneurs.
- **Business Innovation & Growth (BIG):** Member organization providing entrepreneurial support.
- **Charlotte Angel Fund:** Angel investment and mentorship opportunities for tech companies.
- **Ben Craig Center:** Business incubator providing space and support for entrepreneurs.
- **Inception Micro Angel Fund:** Angel investment fund that offers advisory services.
- **Project for Incubation, Energy, and Sustainability:** Business incubator focused on green businesses.
- **Area Fifteen:** Small business incubator focused on artistic endeavors.

Quality of Life

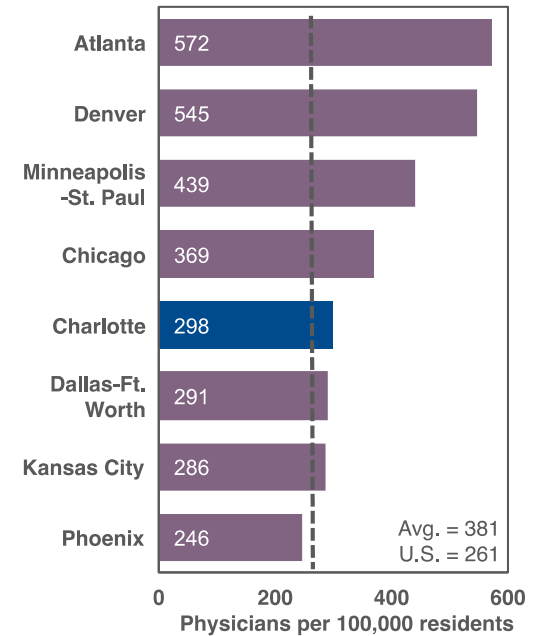
The Greater Charlotte Region boasts numerous recreation opportunities, from professional sports to NASCAR to outdoor recreation. School systems are also strong, with a relatively low student to teacher ratio of 16 to 1, just above the US average of 15 and below the benchmark average of 18.

The number of physicians per capita in Charlotte is slightly above the US average, with 300 physicians per 100,000 residents.

Student to Teacher Ratio, 2011



Physicians Per Capita, 2011



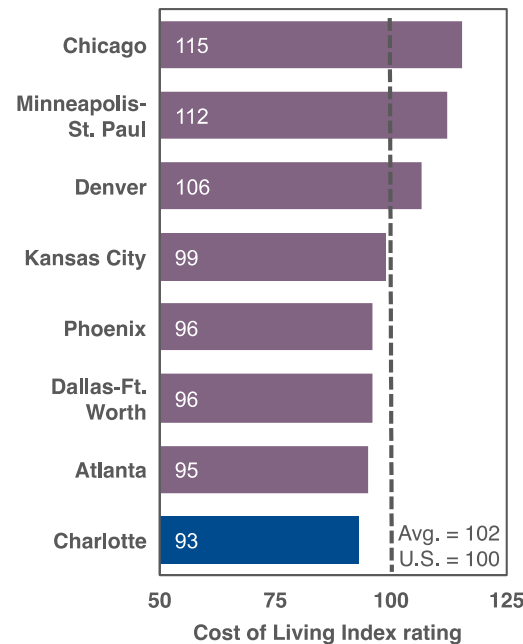
Cost of Living

The Greater Charlotte Region’s cost of living is relatively low. Charlotte received an overall score of 93 in the Cost of Living Index, below the US baseline of 100 and the lowest among benchmark metros, which had an average of 102.

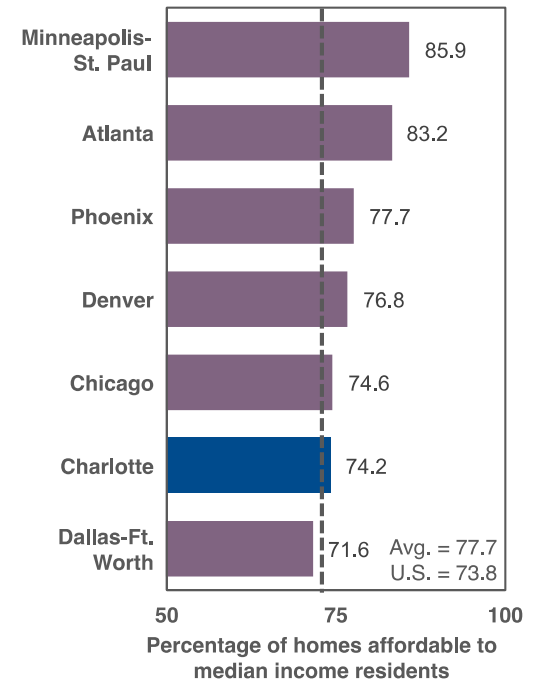
Charlotte received a National Association of Home Builders Housing Opportunity Index score of 74, which means that 74% of homes are affordable to median income residents. This is second lowest rating among benchmarks, but is just above the US average of 73.8.

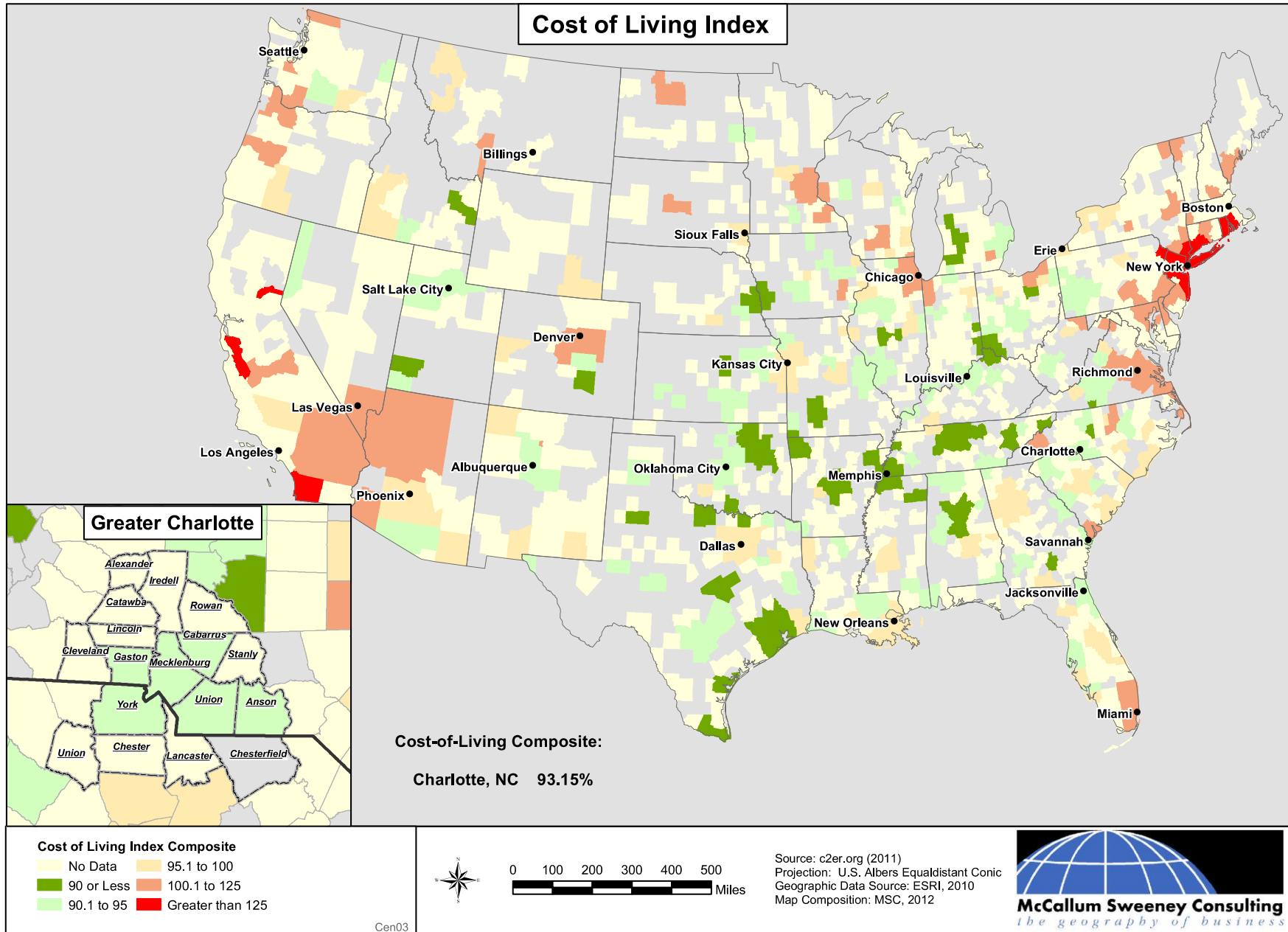
Median home prices reached \$140,000 in Charlotte in 2012, the third lowest among benchmarks. When viewed alongside the Housing Opportunity Index rating, this indicates that although actual home values are relatively low among major metros, median incomes are also relatively low. Nonetheless, housing in Charlotte remains as affordable as US averages and well below many large metropolitan areas.

Cost of Living Index, 2011



NAHB Housing Opportunity Index, 2012

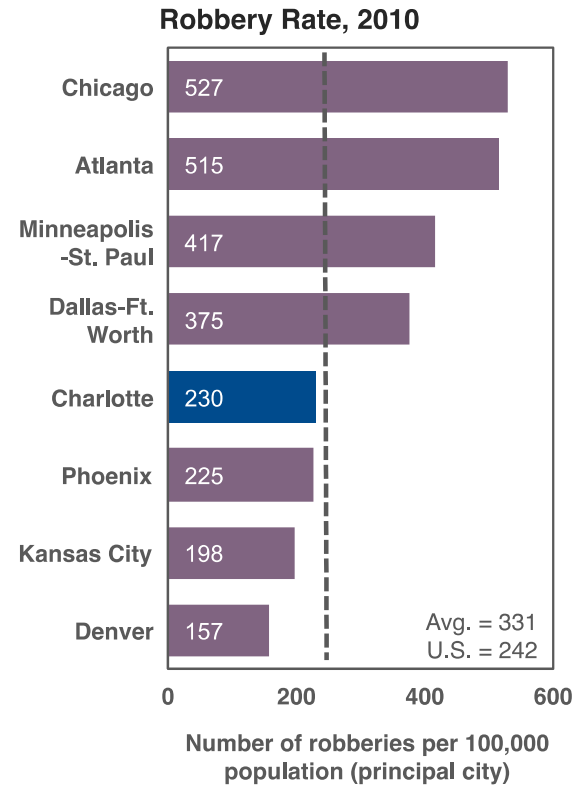
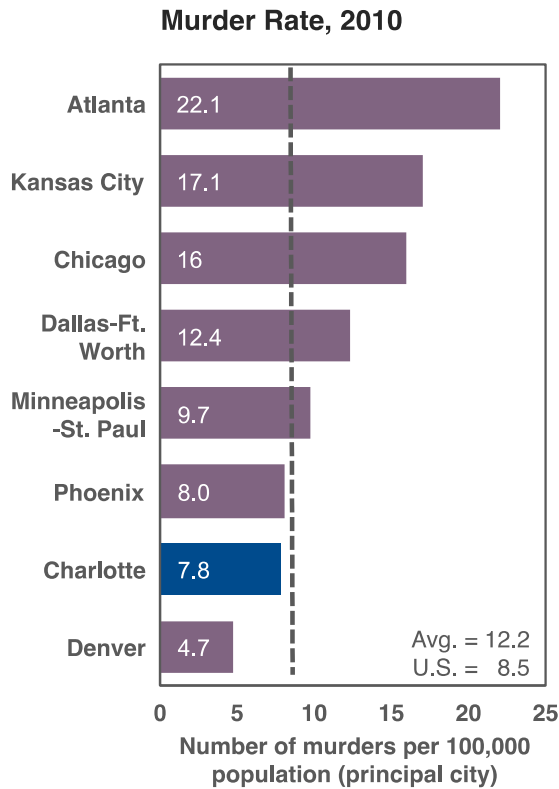




Crime

Crime is very low in Charlotte. With a murder rate of 8 per 100,000 residents in 2010, Charlotte was well below the benchmark average of 12 and the US urban average of 9. Only Denver had a lower murder rate among benchmark metros.

Robberies were also relatively low in 2010, with 230 per 100,000 residents in Charlotte, below the US average of 240 and the benchmark average of 330.



Section 3:

Community Feedback on Targets

Feedback on Targets

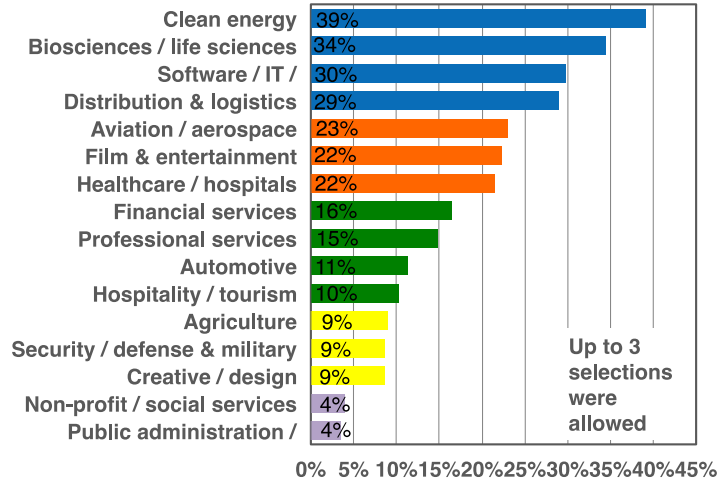
To expand our understanding of citizens' desires for targeted industry growth in the future, we asked several questions as part of our online citizen survey. We also conducted numerous focus groups and interviews with local business and economic development leaders to hear their opinions on which industries and technologies are the best targets for the region. By combining local input via surveys and interviews with our own analytical evaluation, we can better identify target that are both desired and realistic for the region. Combining qualitative analysis (input) with quantitative analysis (data) also alerts us to misalignments that may exist – for example, when the public is more eager to pursue an industry that may be too emerging to have a large numeric impact on job creation. Conversely, the public may be holding on to a declining industry. In these cases, a communications campaign can bring alignment between perceptions, desires, and realities.

Citizen Survey Methodology

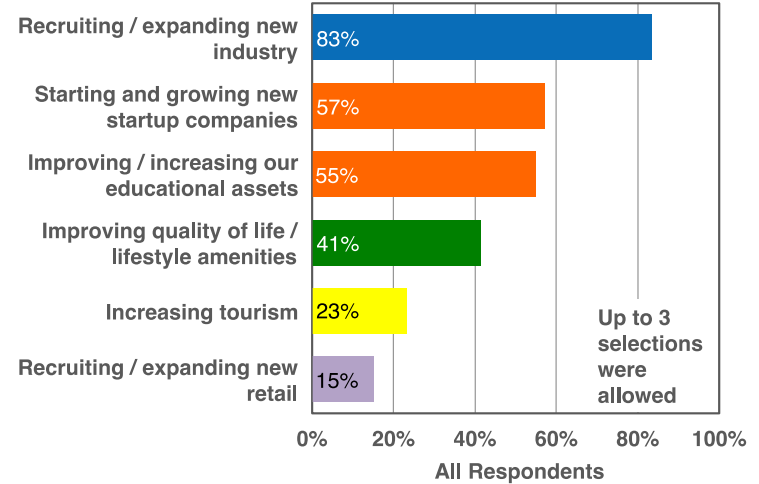
From July through September 2012, the consulting team conducted a survey of citizens across the region. The survey contains questions about the strengths and weaknesses of the region and which industries are the best opportunities for growth. In this section, we show the survey responses.

Following the survey, we provide leadership feedback from the Global Competitiveness Summit at Central Piedmont Community College on August 10, 2012.

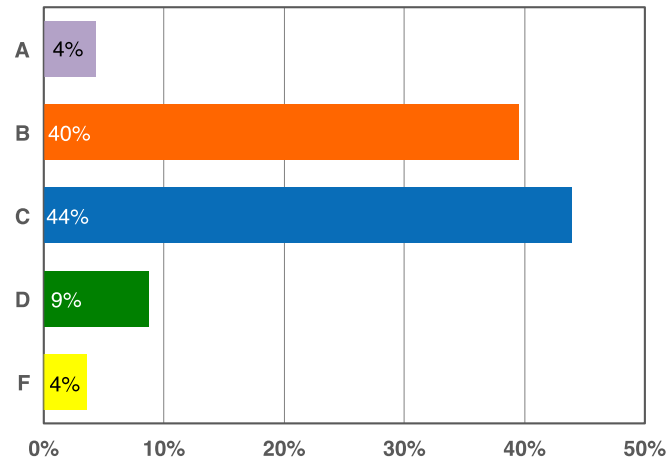
What industry clusters are the most desirable targets for the Greater Charlotte Region?



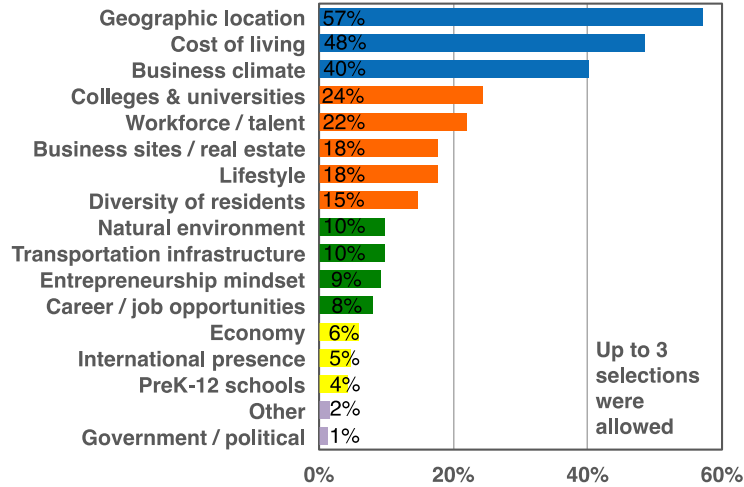
Successful economic development the Greater Charlotte Region means:



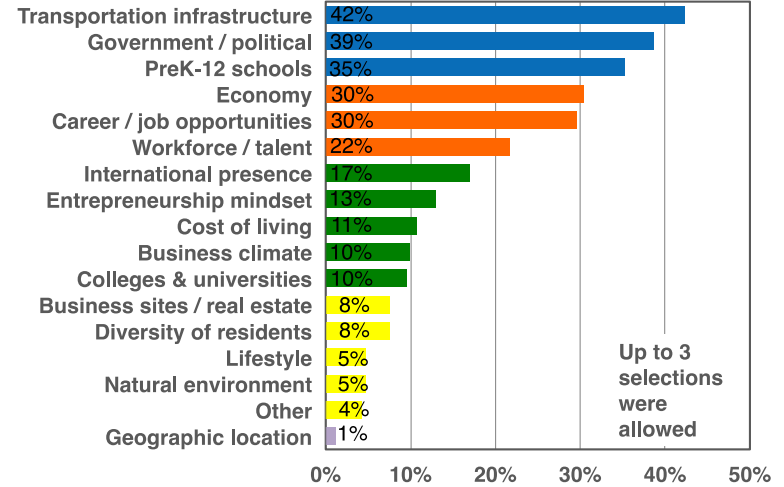
How would you grade the Greater Charlotte Region's economic performance over the past five years?



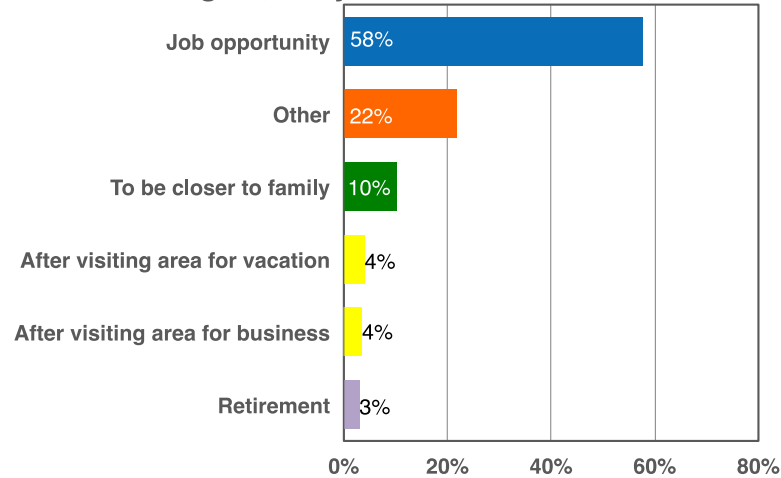
Rate the Greater Charlotte Region's top three competitive strengths



Rate the Greater Charlotte Region's top three competitive weaknesses.

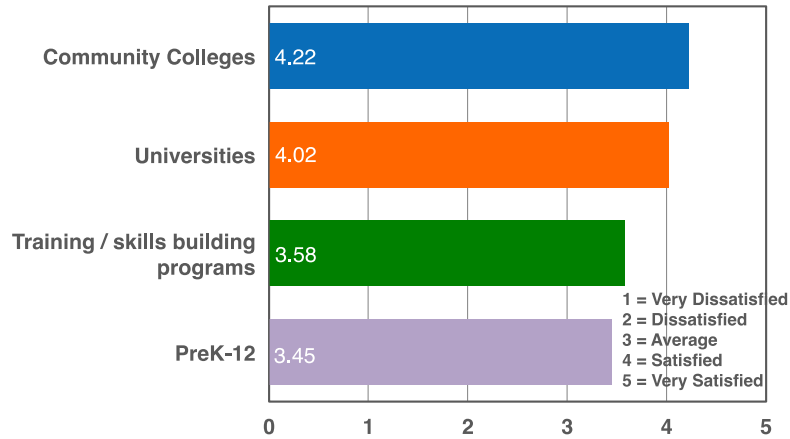


If you were not born in the Greater Charlotte Region, did you relocate here for:



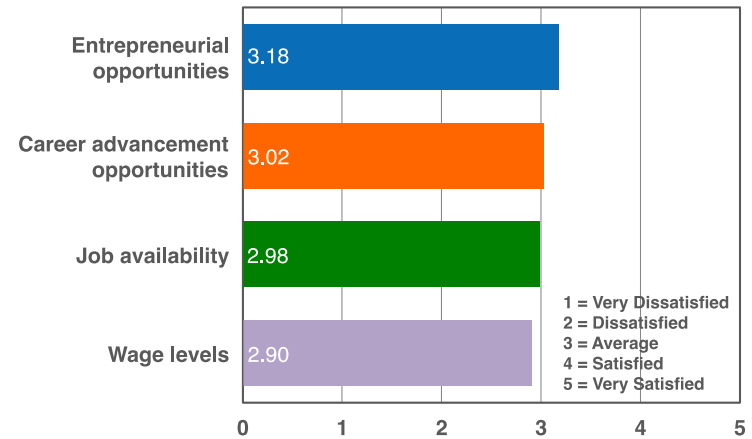
How well does the Greater Charlotte Region meet your expectations in the following areas:

EDUCATION



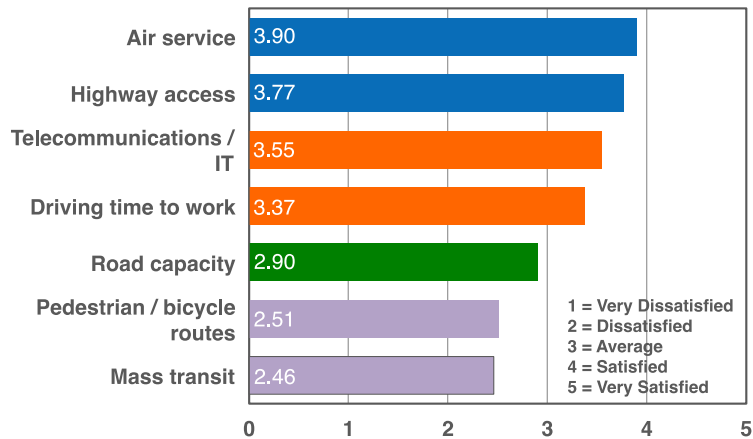
How well does Greater Charlotte Region meet your expectations in the following areas:

CAREER



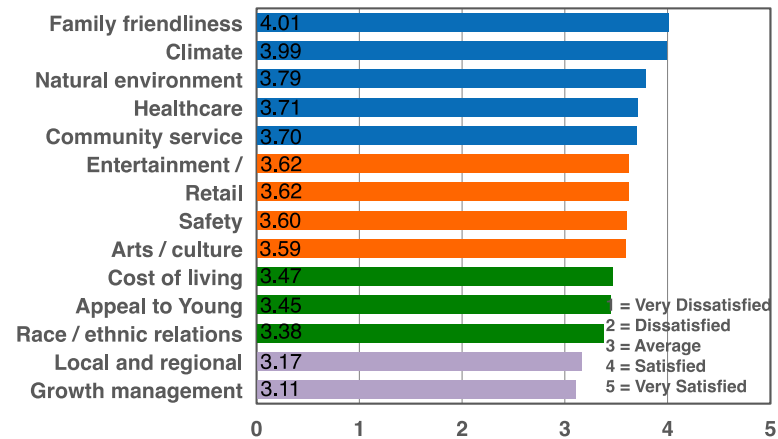
How well does the Greater Charlotte Region meet your expectations in the following areas:

INFRASTRUCTURE

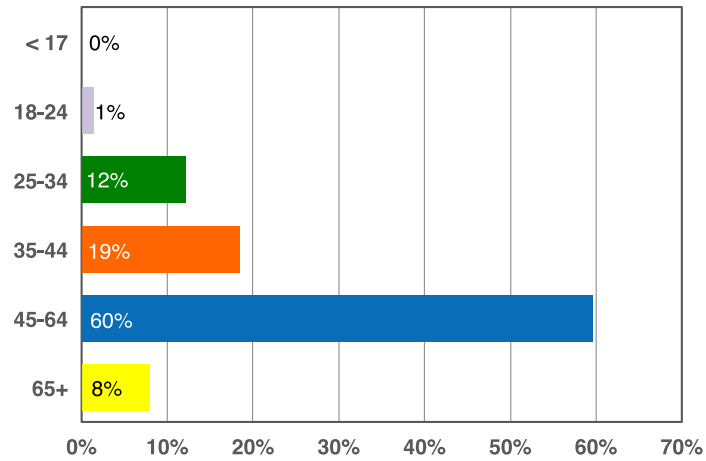


How well does the Greater Charlotte Region meet your expectations in the following areas:

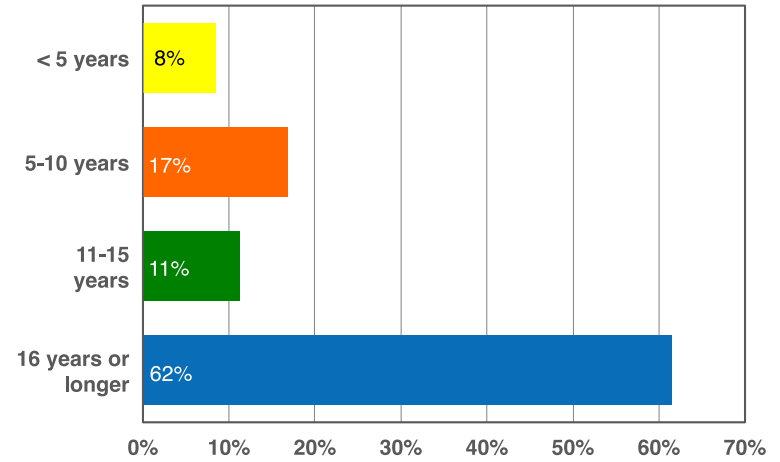
LIVABILITY



Into which age group do you fall?



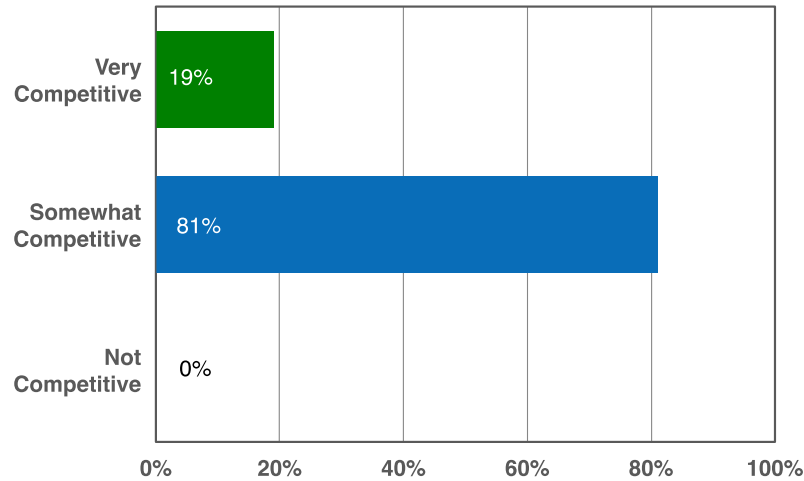
How long have you lived in the Greater Charlotte Region?



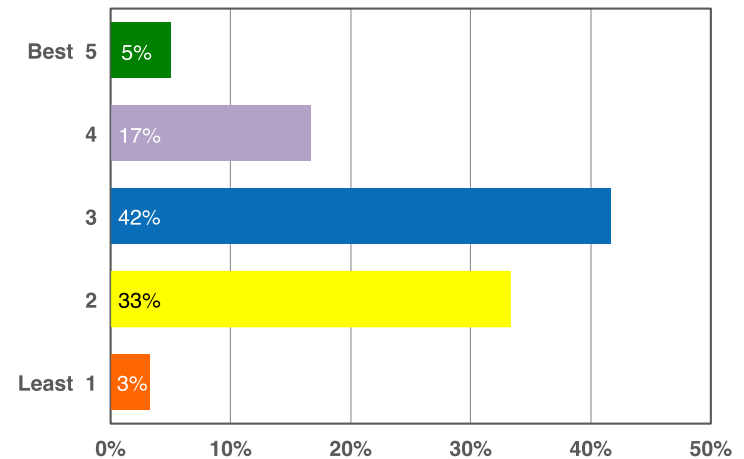
Global Competitiveness Summit

In addition to the online survey, Avalanche Consulting participated in the Global Competitiveness Summit at Central Piedmont Community College on August 10, 2012. During speaker presentations, a poll of the audience was conducted on the community’s readiness to compete, future growth opportunities, and collaboration. We present these poll results as valuable contribution to the identification of industry opportunities and growth strategies for the region.

How globally competitive do you see Charlotte?

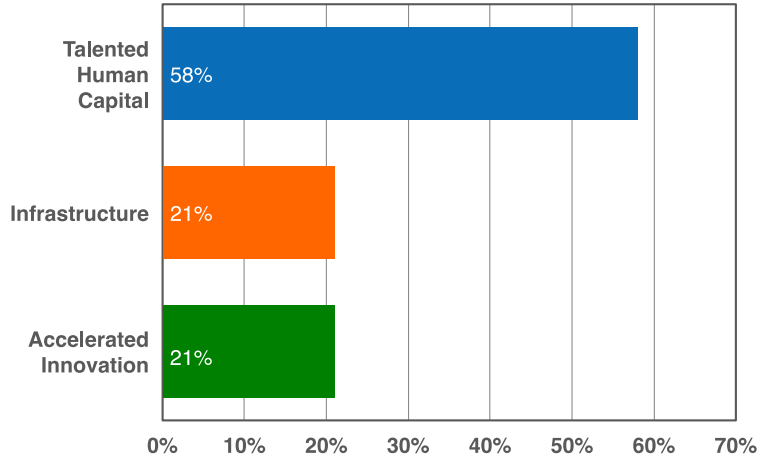


Rank the Charlotte region’s standing as a center for clean energy strategies. (1 = least, 5 = best)

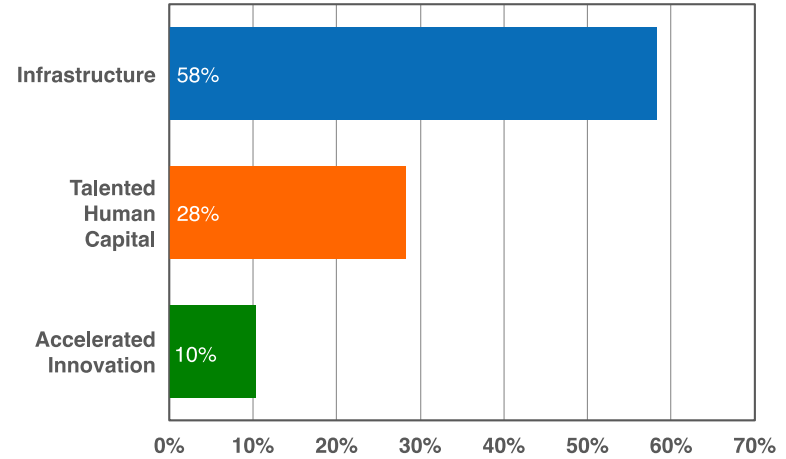


Source: Global Competitiveness Summit at Central Piedmont Community College on August 10, 2012

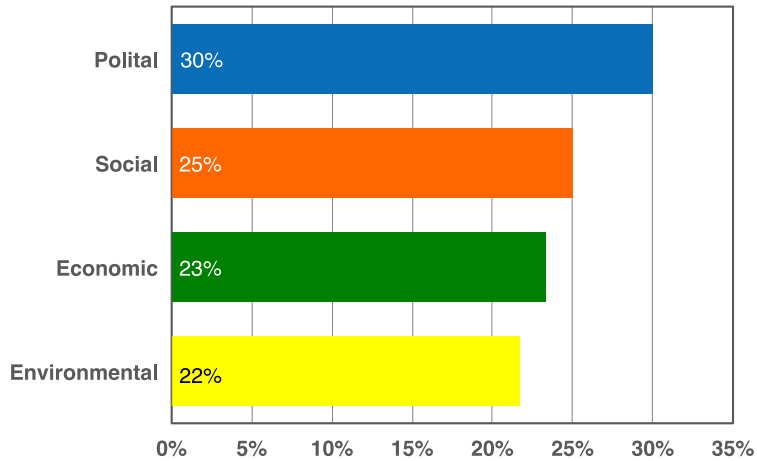
What is most important to the growth of manufacturing in the Charlotte region?



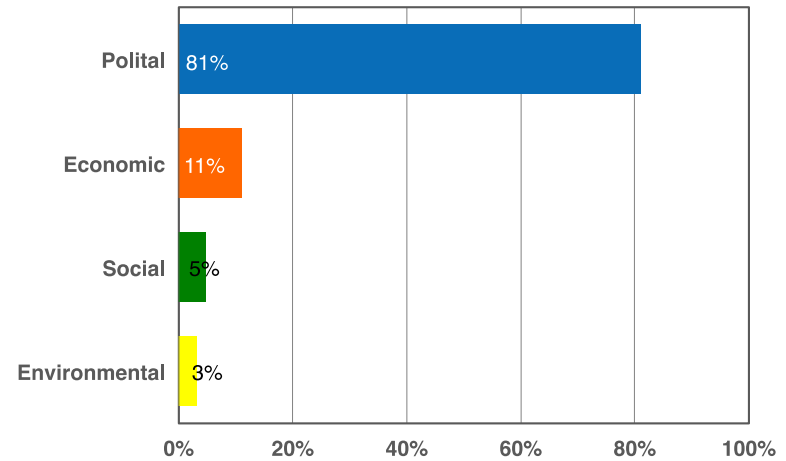
Which of the following is the Charlotte region best at right now?



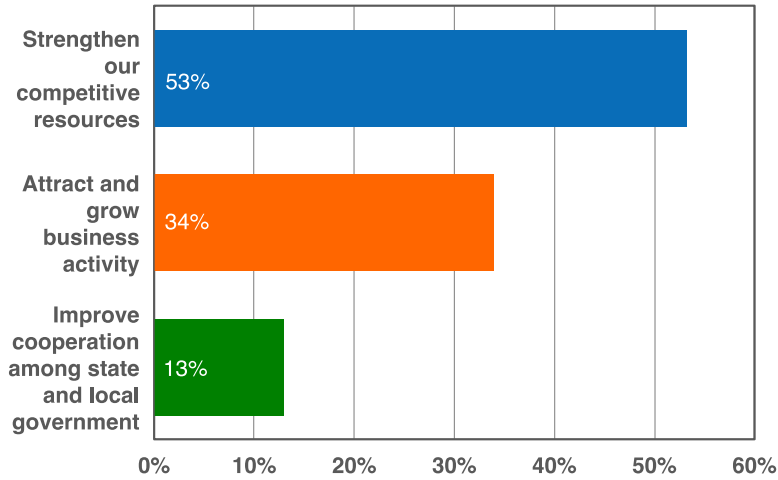
What do you think is the biggest problem we face in the world today?



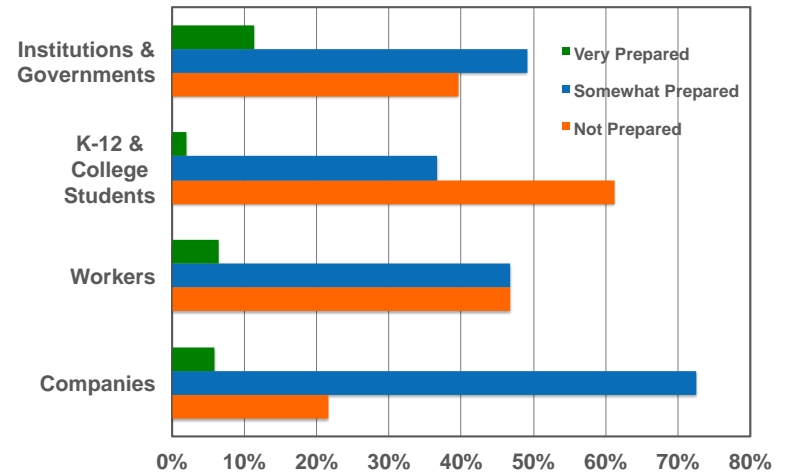
In the US, what do you think is the biggest problem we face today?



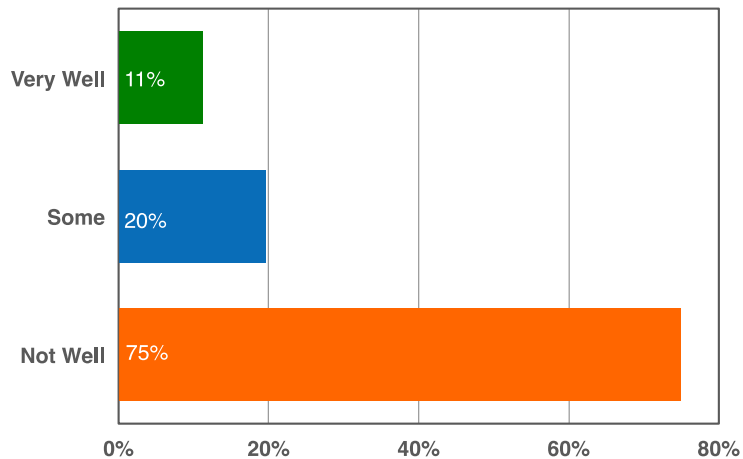
What do you think is our priority as a region?



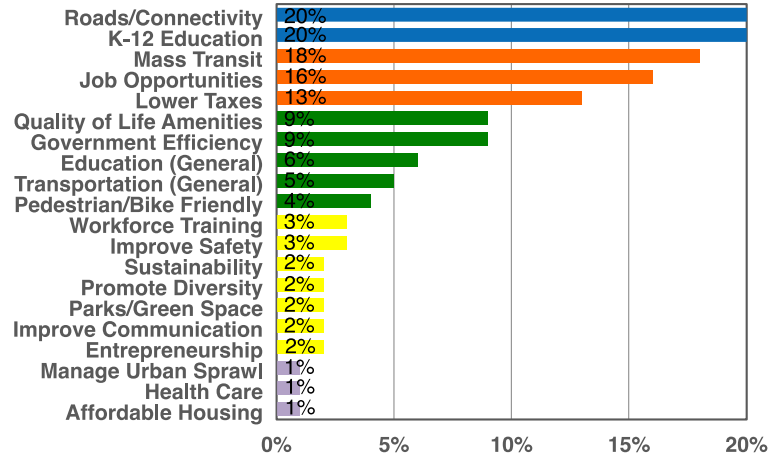
How prepared are the following to meet demands and compete for our region's opportunities?



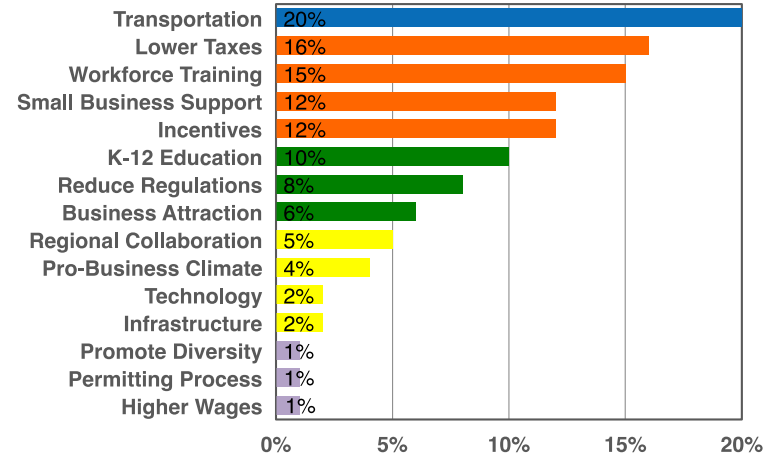
How well is the Charlotte region's globally competitive future communicated to our audiences?



Name two specific things leaders can do to make the region a better place for residents.



Name two specific things leaders can do to make the region a better place for business.



Section 4:

Strengths, Weaknesses, Opportunities, and Threats

Strengths, Weaknesses, Opportunities, and Threats

The use of the SWOT concept is a traditional but highly effective method to facilitate meetings with stakeholders. A SWOT discussion brings structure to a group discussion and helps participants consider where their opinions should be grouped and prioritized. Listing Strengths allows the group to come to consensus about what should be celebrated in the region. Participants voice their concerns as either weaknesses (present, having negative effects on people or businesses) or threats (if we don't fix this soon, things will get much worse). Opportunities usually reflect the hopes and ambitions of the region, either building on strengths or turning weaknesses into strengths.

The SWOT discussions were backed by detailed data produced by the consulting team. The *Economic & Demographic Assessment* provided an update on the conditions for the region's citizens, businesses, and students. The *Asset Inventory, SWOT, & Target Industries and Competencies* report provided highlights of the strongest assets and actors affecting the region's economic development. Finally, the online survey of residents in the Centralina region provided further public input to the consulting team for their analysis.

On the following pages, we present the summary "SWOT Boxes" for five focus areas:

- Workforce & Education
- Entrepreneurship & Innovation
- Infrastructure
- Business Climate
- Quality of Life

While these summary boxes reflect the focus groups, interviews, research, and survey, they are fundamentally formed from the consulting team's own assessment. The SWOT findings are written by the consulting team based on the best available information and our own expertise working with communities across the US. Many of the observations are focused on the region as a whole; some counties may determine that the findings do not apply; some observations may be specific to a single or multiple counties.

SWOTs are intended to be high-level summaries so that the community and its leadership can understand the key priorities for action in the coming years. We encourage SWOTs to be used as big picture guides, with future workgroups and activities to further define the extent of each issue.

WORKFORCE & EDUCATION

<p>Strengths:</p> <ul style="list-style-type: none"> • Large, educated and growing young professional population • UNC Charlotte • Good work ethic and low unionization rate • Focus on up-skilling of workforce has occurred in manufacturing • Strong community colleges in every county • Strong technical institutes and private colleges • Downtown Executive MBA programs (Wake Forest University and Northeastern University) • Apprenticeship programs (Apprenticeship 2000 with Siemens) and industry-education collaboration are world-class • Competitive Workforce Alliance and Charlotte Regional Workforce Development Partnership ensures a workforce and college platform for unified collaboration with industry • Emerging collection of Career Academies 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Some inefficiencies of alignment between education, workforce development, and business community • Disconnect between needed real time workforce skills and immediate industry talent demand • Soft skills lacking for some industries • Low educational attainment levels and adult literacy rates in some counties • K-12 performance varies across counties • Basic skills lacking for high school graduates • Limited medical school presence • No Chemical Engineering program at UNC Charlotte • Difficulty in transferring credits across institutions and across the state line • Limited success in focus on Adult Learners
<p>Opportunities:</p> <ul style="list-style-type: none"> • Improve communication and collaboration across education, workforce development, economic dev., and business • Align education and workforce development with target industry needs • Collaborate on legislative issues related to education funding • Build on K-12 programs that focus on basic skills development and workforce preparedness • Ensure ongoing technology upgrades in the classrooms will occur with industry support (hardware and software) • Continue to strengthen transitioning of military to civilian careers 	<p>Threats:</p> <ul style="list-style-type: none"> • Over focus on 4-year degrees will create further imbalance in workforce and discourage students from 2-year degree options (“middle skills gap” and K-12 Career path barrier) • Lack of interest in students for apprenticeship programs and technical careers • Teachers and students don’t understand which industries and occupations are growing in the region; concerns that technology being taught is already outdated • Retiring manufacturing workers mean that younger workers will need to learn adv. mfg. techniques, automation/robotics • Inadequate/threatened funding for education/workforce dev.

ENTREPRENEURSHIP & INNOVATION

<p>Strengths:</p> <ul style="list-style-type: none"> • Small Business Development Centers at community colleges • Ventureprise and Packard Place resources and incubators • Growing small business sector • Increased R&D university funding with institutes in medicine, bioinformatics, optics, motorsports, visualization, software • North Carolina Research Campus in Kannapolis • UNCC Charlotte Research Institute • UNCC EPIC – Energy Production and Infrastructure Center • Entrepreneurs are attracted to the region’s lifestyle, amenities, and international airport • Historical innovation and industrial entrepreneur heritage 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Fragmented entrepreneurial efforts across counties • New small business formation and growth of small firms has decreased in some surrounding counties • Incentives for entrepreneurs are lacking • Angel investment, venture capital, and micro lending opportunities are significantly lacking • Relatively low concentration of S&T workers for population • R&D assets are not well known or leveraged • Lack of a Tier 1 research university • No clear success stories of modern entrepreneurs that have gone public
<p>Opportunities:</p> <ul style="list-style-type: none"> • Increase collaboration and align entrepreneurial resources across counties for larger impact through the new Charlotte Entrepreneurial Alliance; extend services across counties • Maximize utilization of Charlotte Research Institute and NC Research Campus with entrepreneurship organizations • Collaborate with education and community leaders to build an incubator/accelerator or innovation spaces • Expand entrepreneurship education into all levels of education • Tap mentor expertise; large companies for startup contracts • Widely recognized need to invest in entrepreneurship and innovation across the region 	<p>Threats:</p> <ul style="list-style-type: none"> • ED focus on large industries may eclipse public support for programs for small, high-growth • Banking brand for the region will hamper the region’s entrepreneurship brand development • Nationally, VC-backed startups are gravitating to a handful of regions; successful startups may be moved out of Charlotte when they are funded by VC’s • Charlotte region is historically risk-averse and financially conservative • Concern that state research dollars will not come to the region versus established research locations.

INFRASTRUCTURE

<p>Strengths:</p> <ul style="list-style-type: none"> • Highly connected road and rail network to first tier markets • Relatively low traffic congestion versus peers • Low electric costs • Accessible geographic location • Excellent air service (domestic and international) Charlotte/Douglas International Airport • Commuter rail • Key location on freight rail of NFS and CSX railroads • Successful initial Light Rail project with funded extension to UNCC that will double size of system 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Many industrial sites not currently certified by the State Department of Commerce (though some are) • Dwindling number of land sites and buildings suitable for industry use means the region could decline in prospect opportunities • Traffic congestion beginning to make mobility within the region difficult • Telecommunications outside of Charlotte can be lacking • Adequate funding of cost for water/sewer needs • Alignment of efficient utility services within the counties • Lack of Fiber Cable access in some rural counties
<p>Opportunities:</p> <ul style="list-style-type: none"> • Support new intermodal facility and significantly enhance the capacity and integration of the regional distribution network of rail, highway, air, and seaports • Become a “multimodal” region for passengers: rail, highways, bikes, shared vehicles, streetcars, walkable streets • Increase the availability of shovel-ready sites and business parks • Support the expansion of commuter rail lines in congested corridors (such as Charlotte to Mooresville) • Continue to invest in transportation and basic infrastructure to support population and business growth • Good regional planning will mean more efficient (read: lesser cost) financial investment in roads will occur over time • Complete the Freight Mobility Study 	<p>Threats:</p> <ul style="list-style-type: none"> • Traffic congestion is projected to be a significant problem as the region grows (over 50% of workers cross a county line to get to their job); “preferred growth corridors” in the region are also where most congestion exists • Inter-basin transfer of water will continue to be an issue • Lack of a single regional Metropolitan Planning Organization (MPO) means that prioritizing regional transportation investments will require significant government collaboration and citizen participation • Some concern that counties will duplicate facility / industrial park investments – need a strategic regional product mix • Lack of diversified housing in some counties means workers are forced to commute more and industries rate it a negative • Some counties are hesitant and restrictive of growth due to lack of water

BUSINESS CLIMATE

<p>Strengths:</p> <ul style="list-style-type: none"> • Pro-business environment • Long history of a “Can Do” attitude of region • Relatively low property taxes • Low unionization rate • Local jurisdictions use business investment grant programs • The Charlotte Regional Partnership, Charlotte Chamber of Commerce, and 16 EDC organizations comprise one of the leading and awarded mega-region ED partnerships in the country • Greater Statesville EDC and Mooresville - South Iredell EDC are the national No.1 Micropolitan Site Location Award winner for multiple years including 2012. • Collaboration by all Economic Development Organizations across region 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • High state corporate income tax rates • Some reduced and misaligned state incentives inhibit competing effectively • Inability to offer local property tax abatements • Regulatory environment can still be a burden
<p>Opportunities:</p> <ul style="list-style-type: none"> • Streamline government processes across all counties • Identify and expand the availability of competitive incentives throughout the region • Continue to explore local incentives options; consider the benefits of voter-approved ED sales tax in cities • Affirm and support perception that strong political leadership will be required to carry the region forward • Support collective visioning and align initiatives such as the Advantage Charlotte, “Create It, Make It, Move It” strategy, and CONNECT Consortium 	<p>Threats:</p> <ul style="list-style-type: none"> • The state loses relocation prospects due to the state’s inability to keep project information confidential, e.g. Freedom of Information Act (FOIA) • Local incentives should aim to grow jobs with above-average wages • A bi-state jurisdiction region brings various governmental and collaborative challenges • Potential failure of urban and rural communities to achieve collaborative solutions

QUALITY OF LIFE

<p>Strengths:</p> <ul style="list-style-type: none"> • Relatively low cost of living, affordable home values for average and upper income residents, Low crime rates • Plentiful recreational amenities • Open spaces, greenways, and bike trails are expanding • Positive recognition of Carolina Thread Trail program in counties • NASCAR and professional sports teams • Thriving arts and culture community in Charlotte • Diverse, open, and progressive community • Uptown Charlotte has been strengthened/modernized and growing downtown population has brought new retail • Small town charm remains throughout region • Close driving distance to both mountains and beach • Region remains a great place to raise a family 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • K-12 education is improving but still considered a weakness affecting quality of life and the attractiveness of the region to outsiders; “depends on where you live” is not an acceptable answer when asked about K-12 quality • Limited public access to lake • Lack of connectivity in some towns and counties via sidewalks, bike trails, etc. is lacking • Air quality – nonattainment • Affordable housing issues remain in many jurisdictions • Nightlife for young professionals is improved but still lacking • New edgy districts are emerging but still lacking to meet demands of younger growing demographic (22-44 age range)
<p>Opportunities:</p> <ul style="list-style-type: none"> • Collaborate on regional tourism marketing campaign • Expand convention tourism and junior sports competitions • Embrace growing ethnic diversity from incoming populations to make the region more globally-oriented (incl. tourism) • Generally agreed upon viewpoint (consensus) to avoid the mistakes made by other large metros (transportation planning, extreme commutes, misalignment of work-live-play assets) • Consensus that the next generation of community leaders exists but needs to be better engaged; reenergized leadership plan is needed 	<p>Threats:</p> <ul style="list-style-type: none"> • Tourism marketing is often fragmented and inefficient • External perceptions are that Charlotte doesn’t have cultural amenities or nightlife • Growing non-profit community competes for funding and experienced board leadership • Limited local jurisdiction authority limits local funding control and potential future investment • Lack of local funding mechanism make public-private partnership difficult for medium and small cities

Section 5:

Target Recommendations and Profiles

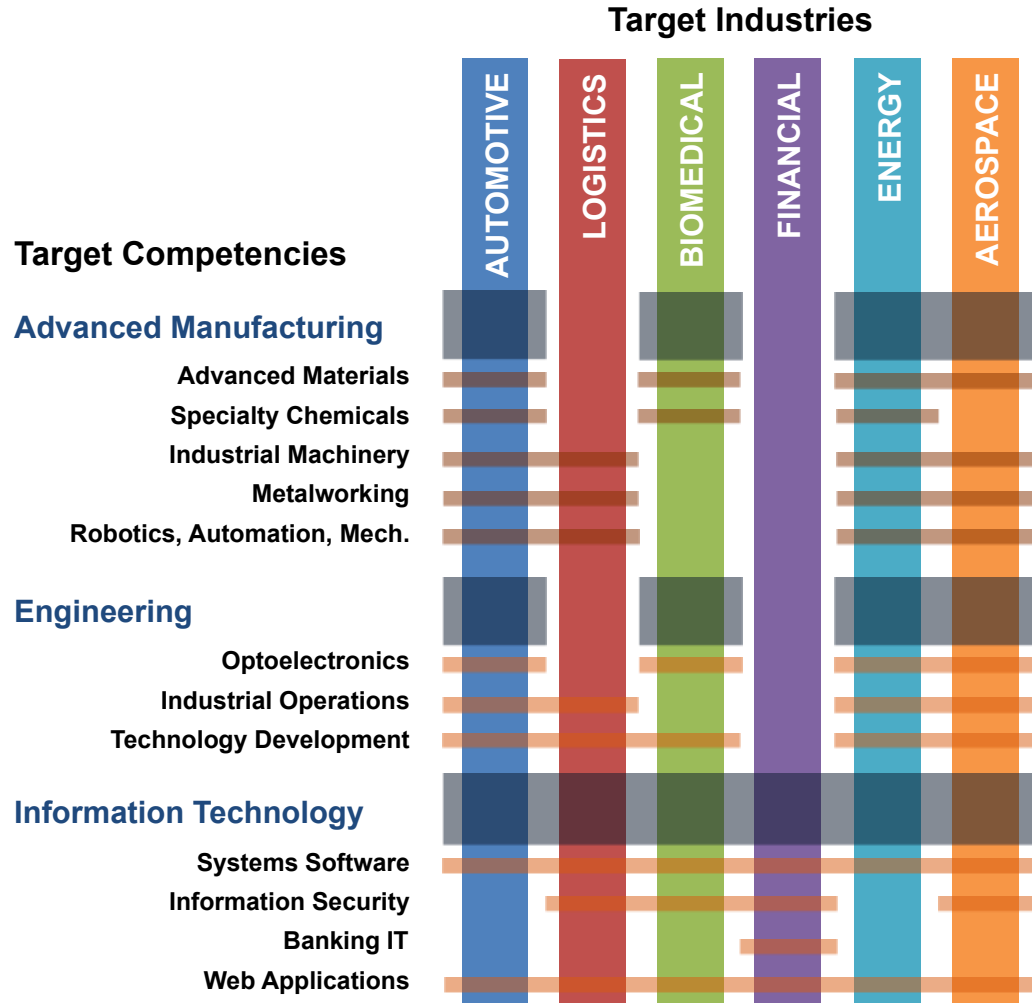
Recommended Targets

The Greater Charlotte Region has numerous Competencies supporting industry growth, from specializations in Advanced Materials and Robotics to Engineering expertise in Optoelectronics and Industrial Operations. The diagram to the right illustrates the identified and recommended Target Industries and Target Competencies for the Greater Charlotte Region and how they intersect.

On the following page, a detailed matrix indicates the specific niche industries within the six major industries to be targeted. Emerging industries are identified in italics.

Target profiles for each industry and competency follow.

Target Competency Matrix – Greater Charlotte Region



Target Industries*Italics = emerging*

Automotive	Logistics & Global Commerce	Biomedical & Health
Motorsports	Intermodal Distribution	Biomedical Supplies & Labs
Battery Technology	Warehousing	Regional Health Care
Automotive OEMs	International Logistics HQs	Medical Device Mfg
Auto Suppliers, incl. Plastics	Food Processing & Distribution	<i>Bioinformatics & Genomics</i>
Electronic Components	Paper & Wood Product Mfg/Dist.	<i>Nutritional Sciences</i>
Financial Services	Energy	Aerospace & Defense
International & Domestic Banking	Nuclear Components	Aircraft parts suppliers
Investment Banking	Energy Equipment & Components	UAVs
Insurance	Energy Generation & Dist.	Defense Contractors
Back Office	<i>Clean Energy</i>	Defense Research
<i>Financial IT</i>		
Corporate Headquarters	Tourism	Film

Target Competencies

Advanced Manufacturing	Engineering	Information Technology
Advanced Materials	Optoelectronics	Data Centers
Specialty Chemicals	Industrial Operations	Systems Software
Industrial Machinery	Technology Development	Information Security
Metalworking		Banking IT
Chemicals		<i>Web applications</i>
Robotics, Automation, Mechatronics		

Aspirational Targets

Software	Health Care	Financial Services
Logistics IT	Clinical Testing	Mobile Banking IT
Data Visualization	Health Care IT	

Automotive

Industry Definition

The Automotive industry includes automobile manufacturers and their part suppliers, complex internal electronic components, advanced material developers, and alternative fuel researchers.



GREATER CHARLOTTE REGION

Niche Subsectors

- Motorsports
- Battery Technology
- Automotive OEMs
- Auto Suppliers, incl. Plastics
- Electronic Components

Strategic Assets

- NASCAR R&D Institute
- NASCAR Technical Institute
- UNCC Charlotte Motorsports Lab and Water Tunnel
- Polymers Center of Excellence
- Manufacturing base
- Numerous motor speedways
- Motorsports educational programs

Key Statistics

- 2,800 motor vehicle manufacturing employees
- 6,700 motor vehicle parts manufacturing employees
- Over \$2.25 million in vehicle technology research at UNCC
- 300 engineering graduates a year at UNCC

Why Greater Charlotte?

The Greater Charlotte Region has a long history in motorsports, with numerous racing locales, technical institutions, and motor vehicle and motor vehicle part manufacturers. These assets combined with local materials and electronic components specialties present numerous opportunities in the region.

Logistics & Global Commerce

Industry Definition

Logistics & Global Commerce includes services related to the storage and transportation of goods, including the local production of goods with regional and global distribution networks such as food and paper products.



GREATER CHARLOTTE REGION

Niche Subsectors

- Intermodal Distribution
- Warehousing
- International Logistics HQs
- Food Processing & Distribution
- Paper & Wood Product Mfg./Dis.

Strategic Assets

- Charlotte Douglas International Airport
- Diverse, international industry presence
- Foreign Trade Zone
- New intermodal facility at airport
- Multi-directional rail network
- Seaport access

Key Statistics

- Nearly 700 nonstop flights, including international destinations
- Over 100 distribution centers
- Over 850 foreign-owned firms
- Over 40 languages spoken
- 226,000 employees at foreign US affiliates

Why Greater Charlotte?

The Greater Charlotte Region is a truly international community, with one of the nation's busiest airports, a cutting-edge intermodal distribution facility, rail and seaport access, a Foreign Trade Zone, and a large international business presence. These assets and the high-skill workforce and pro-business environment support continued growth of Logistics & Global Commerce operations.

Biomedical & Health

Industry Definition

The Biomedical & Health industry includes a range of services and goods related to human health, including production of biomedical supplies, manufacturing of medical devices, research of genetics, provision of health care, and all related support services.



GREATER CHARLOTTE REGION

Niche Subsectors

- Biomedical Supplies & Labs
- Regional Health Care
- Medical Device Manufacturing
- Bioinformatics & Genomics
- Nutritional Sciences

Aspirational Targets

- Clinical Testing
- Health Care IT

Strategic Assets

- Carolinas HealthCare System: 3rd largest public healthcare
- US Dept. of Agriculture Human Nutrition Center
- NC Research Campus
- UNCC Bioinformatics Research Center and new medical center
- Diverse training options
- Large patient base

Key Statistics

- 114,000 biomedical and health workers
- Over 14 schools with biotechnology and related programs
- \$35 million investment in the Bioinformatics Research Center at UNCC

Why Greater Charlotte?

The Biomedical and Health industry is a rapidly rising star of the Greater Charlotte Region's economy, with the Carolinas Medical Center opening at UNCC, the new Bioinformatics Research Center, nutritional and other research at the NC Research Campus, and a large medical device manufacturing sector. Strong workforce training help support and grow these assets.

Financial Services

Industry Definition

The Financial Services industry includes operations engaged in financial and insurance activities and support services, including banks, insurance carriers, and back office.



GREATER CHARLOTTE REGION

Niche Subsectors

- International & Domestic Banking
- Investment Banking
- Insurance
- Back Office
- Financial IT

Aspirational Targets

- Mobile Banking IT

Strategic Assets

- Large banking sector, including headquarters of Bank of America
- Below-average operating costs
- Large and experienced financial services workforce
- High quality of life and urban amenities at costs lower than other financial centers

Key Statistics

- 14 Fortune 1000 companies HQed
- 2nd largest banking center in US
- \$2.13 trillion in assets held
- Over 67,000 financial services employees

Why Greater Charlotte?

Financial Services have played a significant role in the Greater Charlotte Region as the home to Bank of America, and this industry continues to grow as one of the nation's largest banking and insurance centers. The region offers a well-trained workforce, international connectivity, and diverse quality of life amenities, while remaining well below the cost of other large US financial centers.

Energy

Industry Definition

The Energy sector includes operations vertically engaged in the production of power, including energy equipment and parts manufacturing, electricity generation and distribution, clean energy technology research, and the deployment of energy technologies.



GREATER CHARLOTTE REGION

Niche Subsectors

- Nuclear Components
- Energy Equipment & Components
- Energy Generation & Distribution
- Clean Energy

Strategic Assets

- Duke Energy headquarters
- Duke Energy solar initiative
- Nuclear engineering specialties
- Electric Power Research Institute R&D facility
- Proximity to numerous Clean Energy research centers throughout North Carolina

Key Statistics

- Over 4,000 energy related businesses
- Nearly 38,000 energy workers
- Over 4,500 utility workers, primarily in electric power generation, transmission, and distribution
- 39 power plants in the region

Why Greater Charlotte?

The Greater Charlotte Region is committed to becoming the New Energy Capital, supporting the significant regional Energy industry through public support for clean energy, numerous research institutions, strong workforce training programs, and a commitment to developing and manufacturing the new technologies essential to this industry.

Aerospace & Defense

Industry Definition

Aerospace & Defense includes a broad range of technology manufacturing and research related to aircraft, aircraft parts, propulsion technologies, and other military technologies and equipment.



GREATER CHARLOTTE REGION

Niche Subsectors

- Aircraft Parts Suppliers
- UAVs
- Defense Contractors
- Defense Research

Strategic Assets

- Proximity to numerous major aerospace OEM's in Carolinas
- Charlotte Research Institute (CRI) at UNCC
- Center for Optoelectronics
- Advanced materials specialties; Polymers Center of Excellence
- Diverse defense contractor presence

Key Statistics

- Over 1,000 Dept. of Defense contractor firms
- Over 7,200 military employees
- Over 100 aerospace firms
- Nearly 800 aerospace manufacturing employees
- Over 8,000 engineers in the region
- Defense & Security sector employs over 21,000

Why Greater Charlotte?

Aerospace and Defense activities have long played a major role in the Carolinas, with over 15 military installations throughout North and South Carolina and numerous aerospace OEMs and parts manufacturers. The Greater Charlotte Region has a significant presence in this industry, including a large manufacturing workforce and over 1,000 existing contractors.

Corporate Headquarters

Industry Definition

Corporate Headquarters are the highest level office for a company, hosting executive and executive support staff, responsible for the operations of all branches of the company throughout the country and world.



GREATER CHARLOTTE REGION

Major Headquarters

- Bank of America
- Lowe's
- Nucor
- Duke Energy
- Family Dollar
- Sonic Automotive
- Domtar
- SPX

Strategic Assets

- Home to numerous international firms
- Diverse cultural, urban, entertainment, and recreational assets
- Strong school and healthcare systems
- Professional sports and NASCAR
- Relatively low-cost of living

Key Statistics

- 14 Fortune 1000 companies HQed
- 9 Fortune 500 firms HQed
- 2nd largest banking center in US
- 2 professional sports teams
- 93.9 Composite Cost of Living Index (Relative to 100 for US and 226 for Manhattan)

Why Greater Charlotte?

The Greater Charlotte Region is one of the nations largest homes of Fortune 500 firms. The Greater Charlotte Region continues to attract Corporate Headquarters operations from throughout the world due to the region's robust business community, numerous lifestyle assets, including professional sports and outdoor recreation, relatively low-cost of living, and overall quality of life.

Target Competencies

Advanced Manufacturing

Advanced Manufacturing involves operations engaged in the production of complex equipment, chemicals, and other materials, including industrial machinery manufacturing, fabricated metalworking, and robotic systems.

Niche Subsectors

- Advanced Materials
- Specialty Chemicals
- Industrial Machinery
- Metalworking
- Chemicals
- Robotics, Automation, Mechatronics

Engineering

The Engineering field includes a number of highly specialized technical sectors related to the design and operation of engineering systems, including manufacturing machinery, civil infrastructure, electronic components, and aircraft.

Niche Subsectors

- Optoelectronics
- Industrial Operations
- Technology Development

GREATER CHARLOTTE REGION

Information Technology

The Information Technology industry includes a wide range of operations related to the usage and development of technology, including software publishing, computer system design, internet site development, data hosting and processing, and other information services.

Niche Subsectors

- Data Centers
- Systems Software
- Information Security
- Banking IT
- Web Applications

Aspirational Targets

- Logistics IT
- Data Visualization

Appendix B.1:

County Industry Cluster Snapshots

Industry Cluster Bubble Charts

In the sections below, we examine trends by Industry Cluster for each county in the Greater Charlotte Region.

We show the data using “bubble charts”, which provides an interesting perspective of both local and national dynamics. The bubble chart provides three metrics per industry cluster: forecast growth rate (2012-2017), “Location Quotient” (which is the per capita concentration in the region relative to the US), and number of jobs (the relative size of the bubble).

The location quotient (or LQ – see side bar for detailed explanation) for each industry cluster is presented on the vertical axis, which shows the relative concentration of employment in the industry versus the US concentration. For example, a LQ of 0.9 for Healthcare indicates that there are 10% fewer employees in this industry *per capita* in the region than the US average.

LQ is a relative measure, and a high concentration in one industry means that other industries will have lower LQs. Having an LQ below 1 indicates a lower concentration relative to the denser clusters.

The graphic on the following page illustrates how the bubble charts operate and the implications of cluster locations in each quadrant.

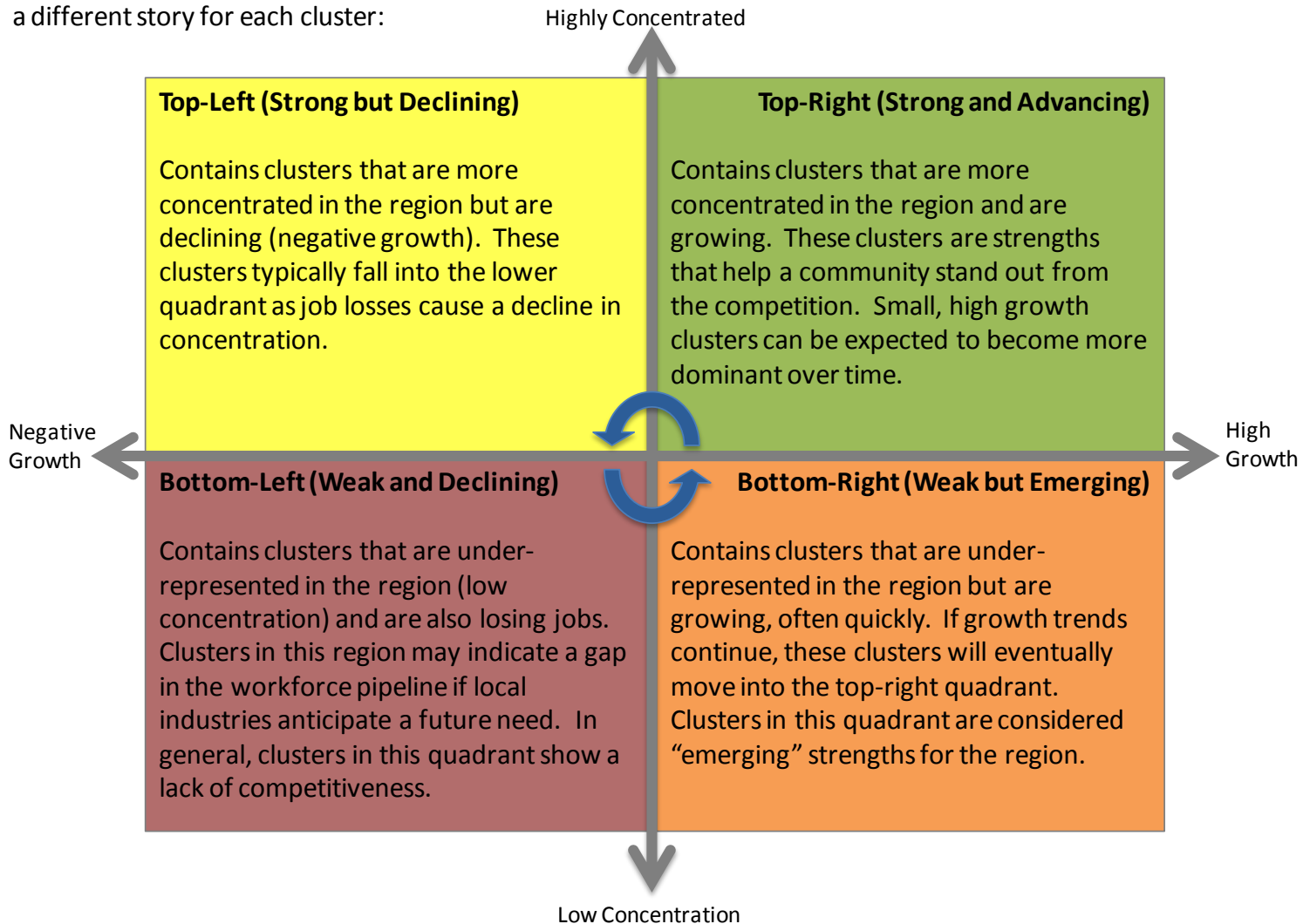
By showing the data for each individual county as well as the overall region, we can see which industry clusters are growing the fastest and where they are located. The charts were designed to be as comparable as possible (scales on the x-axis and y-axis are consistent across charts) for each county.

What is a “Location Quotient?”

This calculation, which is also called a “LQ”, is the relative concentration or density of a specific industry in the Greater Charlotte Region versus the US average for that industry. Specifically, the LQ is calculated by taking the per capita concentration of that industry in the region, divided by the same per capita concentration for the US. A 1.5 LQ indicates that the region has 50% more industry employment, on a per capita basis, than the US, which is a sign of relative local strength in that industry cluster.

Explanation of Cluster Bubble Charts

The graph's four quadrants each tell a different story for each cluster:



Private Sector Industry Clusters

ALEXANDER COUNTY, NC

Alexander County's three **largest clusters** by employment size are Furniture Manufacturing (1,800 employees), Retail (800), and Culture & Entertainment (500).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Private Education (380% growth, 60 new jobs), Logging & Metal/Mineral Mining (304% growth, 70 new jobs), and Software/Info. Tech (110% growth, 10 new jobs).

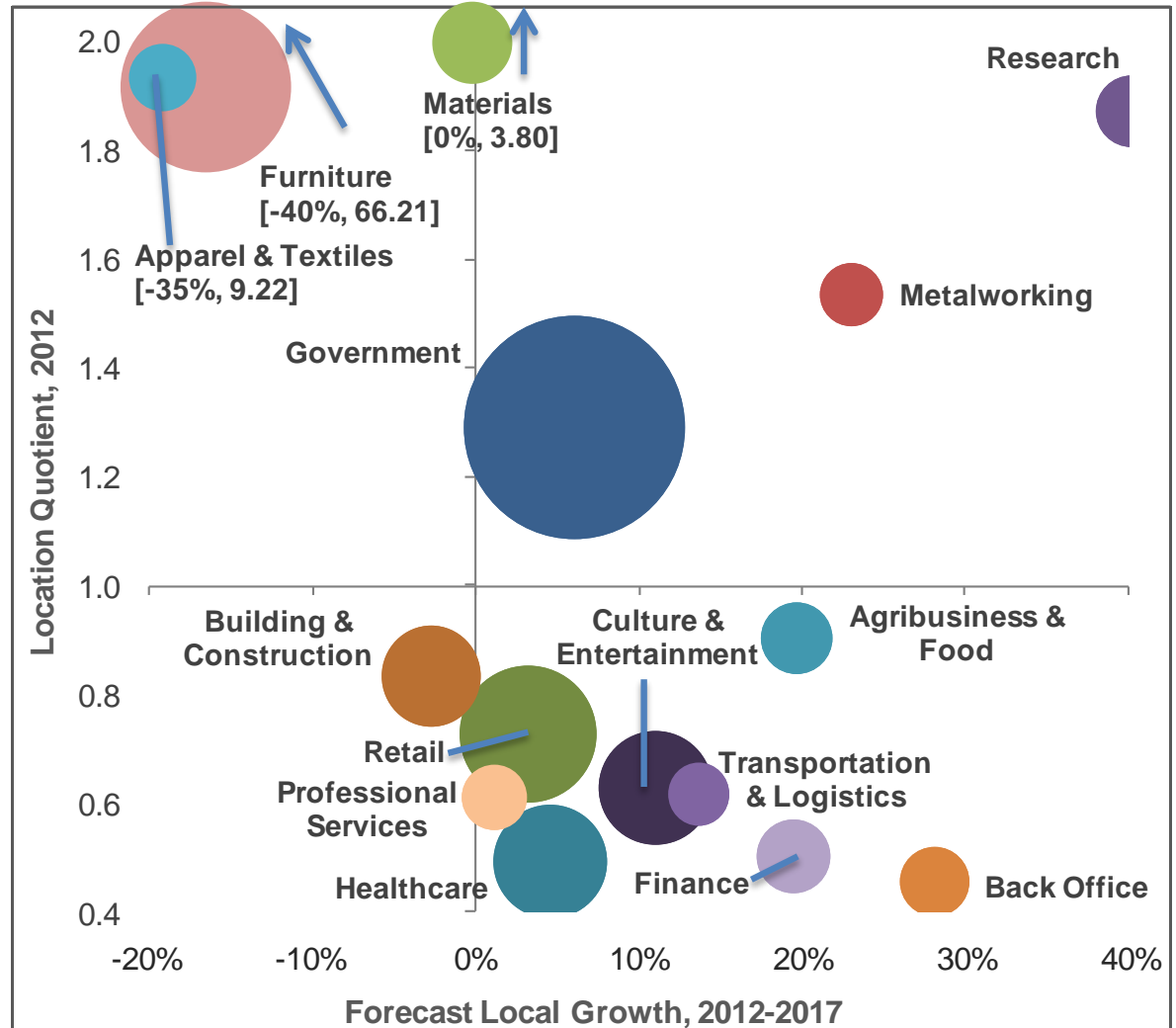
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Automotive (80% forecast growth), Research (40%), and Energy (32%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Furniture (LQ=66.21), Apparel & Textiles (9.22), and Logging & Metal/Mineral Mining (8.16). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Back Office, Finance, and Transportation & Logistics.

Declining clusters include Furniture, which employs 1,800 workers, has an LQ of 66, and lost 47% of its employment base (1,500 jobs) in the last five years. Apparel & Textiles employs 300, LQ=9, and lost 17% (60 jobs). Logging & Metal/Mineral Mining employs 97, LQ=8, and lost 304% (70 jobs).

Industry Clusters: Alexander County, NC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

ALEXANDER COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	0	○	0.00	0	0		0.2%
Agribusiness & Food	209	◐	0.91	(6)	41	19.6%	1.9%
Apparel & Textiles	292	●	9.22	(59)	(102)	-34.9%	-20.1%
Automotive	15	○	0.24	(24)	12	80.0%	-6.0%
Back Office	203	○	0.45	(76)	57	28.1%	8.3%
Biomedical Supplies & Labs	10	○	0.16	0	0	0.0%	8.0%
Building & Construction	406	◑	0.83	(180)	(11)	-2.7%	5.3%
Consumer Goods Mftg	10	○	0.25	(14)	(5)	-50.0%	-0.6%
Culture & Entertainment	535	◑	0.63	(173)	59	11.0%	6.2%
Education (Private)	72	○	0.44	57	23	31.9%	13.2%
Electronics	76	○	0.50	38	(6)	-7.9%	1.3%
Energy	28	○	0.30	6	9	32.1%	-1.5%
Engineering, Design, & Content	39	○	0.18	(29)	0	0.0%	2.0%
Finance	216	◑	0.50	25	42	19.4%	3.2%
Furniture	1,758	●	66.21	(1,532)	(704)	-40.0%	-3.5%
Government	2,006	◑	1.29	28	121	6.0%	4.0%
Healthcare	519	○	0.49	(127)	24	4.6%	11.8%
Industrial Machinery	30	○	0.17	0	8	26.7%	-1.2%
Logging & Metal/Mineral Mining	97	●	8.16	73	(3)	-3.1%	-2.2%
Materials	398	●	3.80	31	1	0.3%	-7.2%
Metalworking	161	◑	1.54	(30)	37	23.0%	-5.1%
Non-Profits	10	○	0.12	0	0	0.0%	6.3%
Professional Services	175	◑	0.61	(8)	2	1.1%	5.5%
Research	212	◑	1.87	58	85	40.1%	21.5%
Retail	767	◑	0.73	(53)	25	3.3%	3.3%
Shipbuilding	0	○	0.00	0	0		-6.0%
Software / Info. Tech.	21	○	0.15	11	4	19.0%	16.5%
Telecom Services	0	○	0.00	0	0		-2.0%
Transportation & Logistics	161	◑	0.62	7	22	13.7%	4.6%
Total	8,338		1.00	(2,014)	(307)	-3.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

ANSON COUNTY, NC

Anson County's three **largest clusters** by employment size are Retail (800 employees), Healthcare (600), and Building and Construction (500).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Furniture (44% growth, 50 new jobs), Metalworking (36% growth, 120 new jobs), and Agribusiness & Food (14% growth, 40 new jobs).

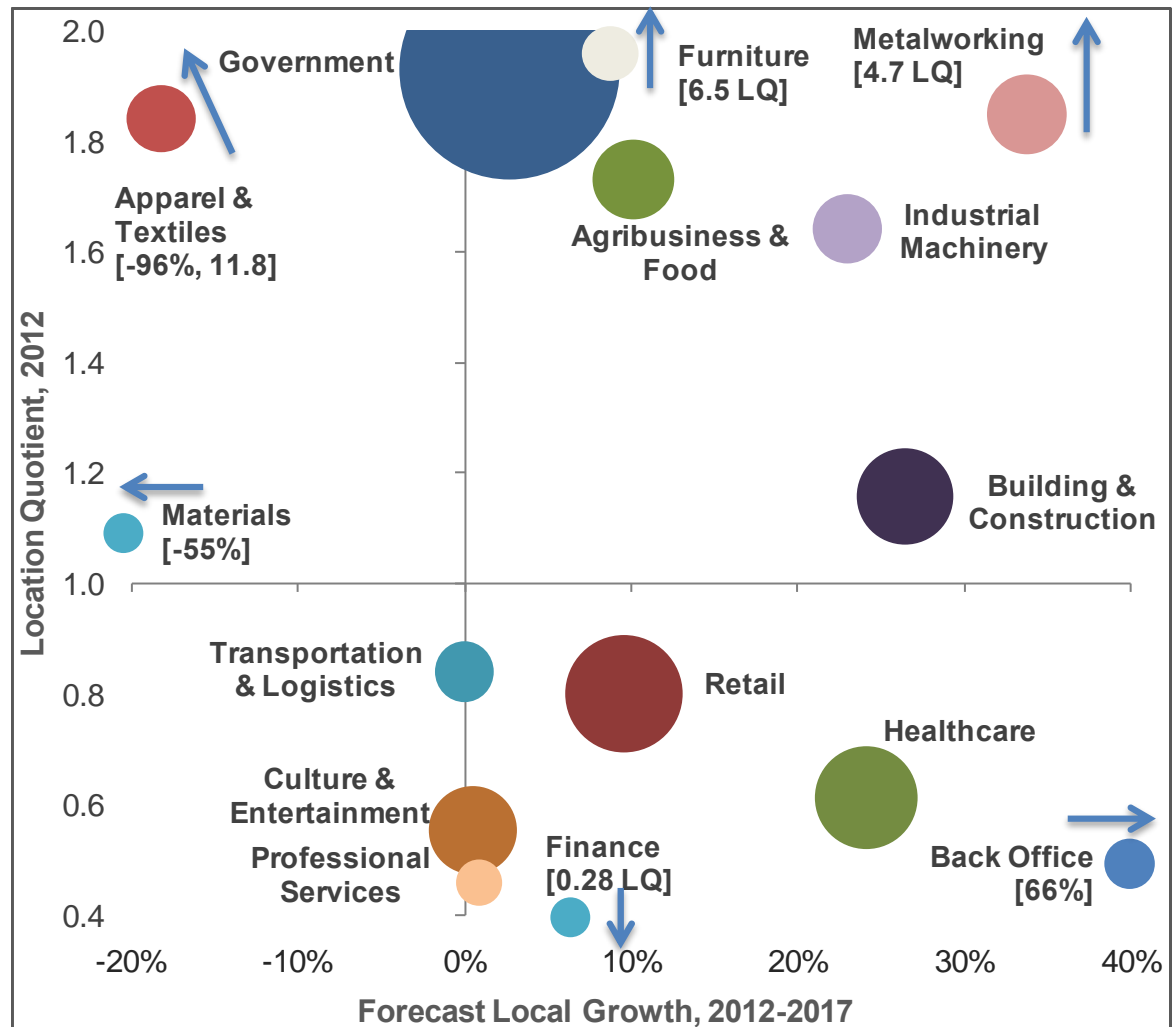
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Back Office (66% forecast growth), Education (60%), and Electronics (38%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=11.82), Logging & Metal/Mineral Mining (7.74), and Furniture (6.52). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Back Office, Healthcare, and Finance.

Declining clusters include Apparel & Textiles, which employs 340 workers, has an LQ of 11.8, and lost 37% of its employment base (200 jobs) in the last five years. Industrial Machinery employs 270 workers, LQ=1.6, and lost 42% (200 jobs). Logging & Metal/Mineral Mining employs 80 workers, LQ=7.7, and lost 46% (70 jobs).

Industry Clusters: Anson County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

ANSON COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	0	○	0.00	0	0		0.2%
Agribusiness & Food	365	●	1.73	44	37	10.1%	1.9%
Apparel & Textiles	342	●	11.82	(197)	(327)	-95.6%	-20.1%
Automotive	5	○	0.09	0	0	0.0%	-6.0%
Back Office	231	◐	0.57	8	152	65.8%	8.3%
Biomedical Supplies & Labs	5	○	0.09	5	0	0.0%	8.0%
Building & Construction	514	●	1.16	(58)	136	26.5%	5.3%
Consumer Goods Mftg	0	○	0.00	(5)	0		-0.6%
Culture & Entertainment	429	◐	0.55	20	2	0.5%	6.2%
Education	10	○	0.07	5	6	60.0%	13.2%
Electronics	40	○	0.29	13	15	37.5%	1.3%
Energy	63	◐	0.75	(14)	(25)	-39.7%	-1.5%
Engineering, Design, & Content	36	○	0.18	(18)	1	2.8%	2.0%
Finance	110	○	0.28	(22)	7	6.4%	3.2%
Furniture	158	●	6.52	48	11	7.0%	-3.5%
Government	2,738	●	1.93	(168)	74	2.7%	4.0%
Healthcare	588	◐	0.61	(36)	142	24.1%	11.8%
Industrial Machinery	269	●	1.64	(198)	62	23.0%	-1.2%
Logging & Metal/Mineral Mining	84	●	7.74	(71)	(3)	-3.6%	-2.2%
Materials	112	●	1.17	15	(62)	-55.4%	-7.2%
Metalworking	454	●	4.74	121	149	32.8%	-5.1%
Non-Profits	10	○	0.13	0	0	0.0%	6.3%
Professional Services	119	○	0.46	24	1	0.8%	5.5%
Research	10	○	0.10	0	0	0.0%	21.5%
Retail	770	◐	0.80	(118)	74	9.6%	3.3%
Shipbuilding	0	○	0.00	0	0		-6.0%
Software / Info. Tech.	0	○	0.00	(5)	0		16.5%
Telecom Services	15	○	0.31	(9)	0	0.0%	-2.0%
Transportation & Logistics	200	◐	0.84	(52)	0	0.0%	4.6%
Total	7,612		1.00	(648)	425	5.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

CABARRUS COUNTY, NC

Cabarrus County's three **largest clusters** by employment size are Retail (11,300 employees), Culture & Entertainment (10,200), and Healthcare (4,990).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Research (16% growth, 128 new jobs), Culture & Entertainment (7.3% growth, 692 new jobs), and Education (6.6% growth, 43 new jobs).

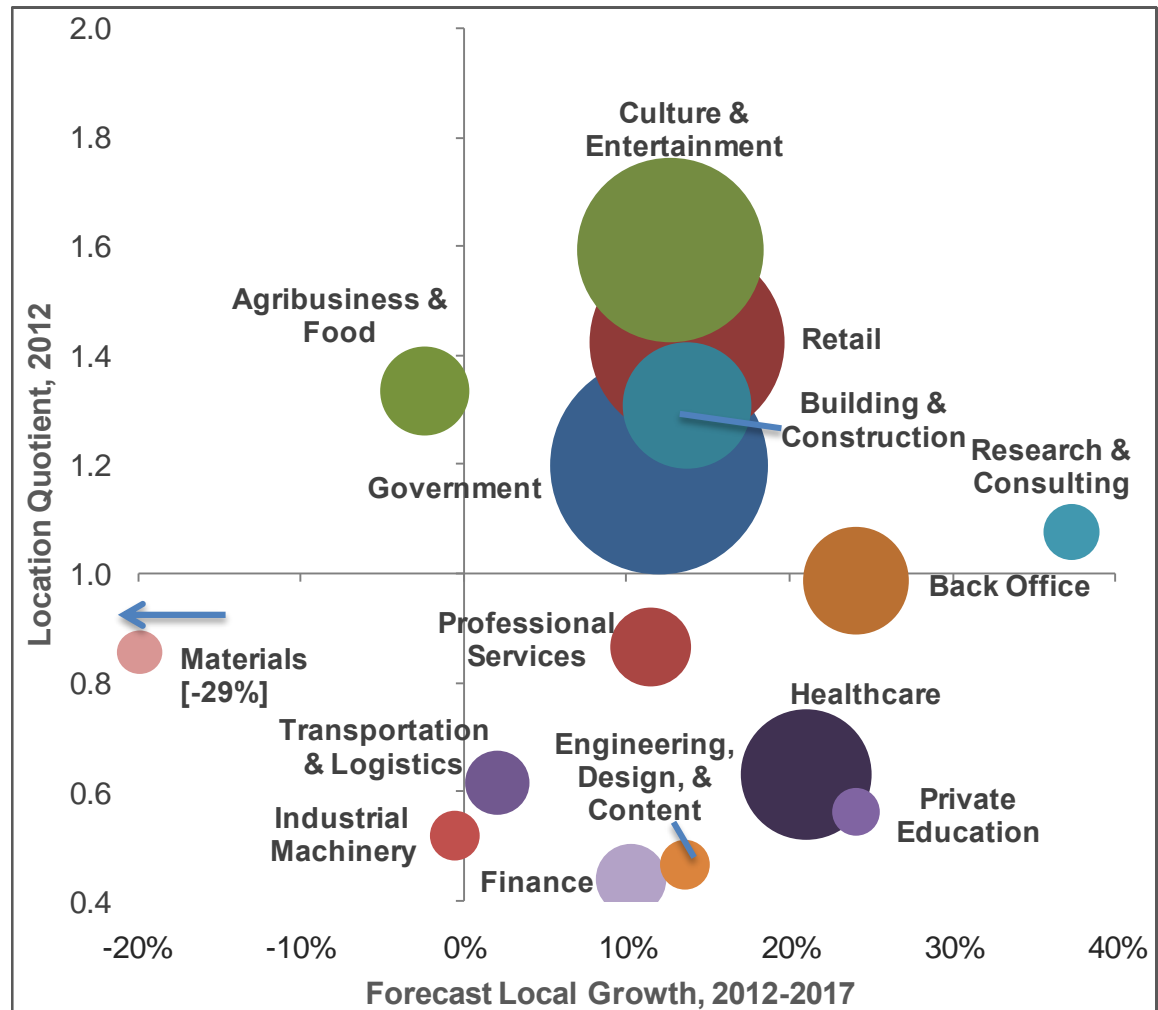
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (37% forecast growth), Automotive (36%), and Non-Profits (32%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=1.72), Culture & Entertainment (1.59), and Retail (1.42). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Private Education, Engineering, Design, & Content, and Finance.

Declining clusters include Building & Construction, which employs 4,800 workers, has an LQ of 1.31, and lost 30% of its employment base (2,000 jobs) in the last five years. Agribusiness & Food employs 2,300, LQ=1.34, and lost 48% (2,400 jobs). Apparel & Textiles employs 400, LQ=1.72, and lost 53% (460 jobs).

Industry Clusters: Cabarrus County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CABARRUS COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	0	○	0.00	0	0		0.2%	
Agribusiness & Food	2,324	●	1.34	-48.0%	(2,149)	(57)	-2.5%	1.9%
Apparel & Textiles	412	●	1.72	-52.9%	(463)	(252)	-61.2%	-20.1%
Automotive	536	●	1.13	-19.8%	(132)	193	36.0%	-6.0%
Back Office	3,318	●	0.99	-4.4%	(153)	796	24.0%	8.3%
Biomedical Supplies & Labs	105	○	0.22	-16.7%	(21)	32	30.5%	8.0%
Building & Construction	4,799	●	1.31	-29.9%	(2,044)	655	13.6%	5.3%
Consumer Goods Mfg	401	●	1.34	-41.1%	(280)	(121)	-30.2%	-0.6%
Culture & Entertainment	10,207	●	1.59	7.3%	692	1,290	12.6%	6.2%
Education	694	●	0.56	6.6%	43	167	24.1%	13.2%
Electronics	608	●	0.53	-26.0%	(214)	(4)	-0.7%	1.3%
Energy	104	○	0.15	-21.2%	(28)	(16)	-15.4%	-1.5%
Engineering, Design, & Content	747	○	0.46	-20.7%	(195)	101	13.5%	2.0%
Finance	1,422	○	0.44	-2.7%	(39)	145	10.2%	3.2%
Furniture	85	○	0.42	-46.9%	(75)	(5)	-5.9%	-3.5%
Government	14,036	●	1.20	9.8%	1,249	1,673	11.9%	4.0%
Healthcare	4,993	●	0.63	-1.7%	(84)	1,046	20.9%	11.8%
Industrial Machinery	703	●	0.52	5.1%	34	(4)	-0.6%	-1.2%
Logging & Metal/Mineral Mining	57	●	0.64	-52.5%	(63)	(4)	-7.0%	-2.2%
Materials	705	●	0.89	-23.9%	(222)	(206)	-29.2%	-7.2%
Metalworking	443	●	0.56	-36.2%	(251)	48	10.8%	-5.1%
Non-Profits	506	●	0.80	2.0%	10	161	31.8%	6.3%
Professional Services	1,861	●	0.86	-0.5%	(9)	213	11.4%	5.5%
Research	919	●	1.08	16.2%	128	342	37.2%	21.5%
Retail	11,314	●	1.42	3.1%	339	1,549	13.7%	3.3%
Shipbuilding	0	○	0.00		0	0		-6.0%
Software / Info. Tech.	245	○	0.23	-22.0%	(69)	59	24.1%	16.5%
Telecom Services	164	○	0.42	-52.0%	(178)	(76)	-46.3%	-2.0%
Transportation & Logistics	1,211	●	0.62	-16.3%	(236)	25	2.1%	4.6%
Total	62,863		1.00	-7.0%	(4,724)	7,743	12.3%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

CATAWBA COUNTY, NC

Catawba County's three **largest clusters** by employment size are Retail (10,000 employees), Healthcare (8,200), and Culture & Entertainment (7,100).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Education (37% growth, 200 new jobs), Research (57% growth, 150 new jobs), and Software/Info. Tech (55% growth, 80 new jobs).

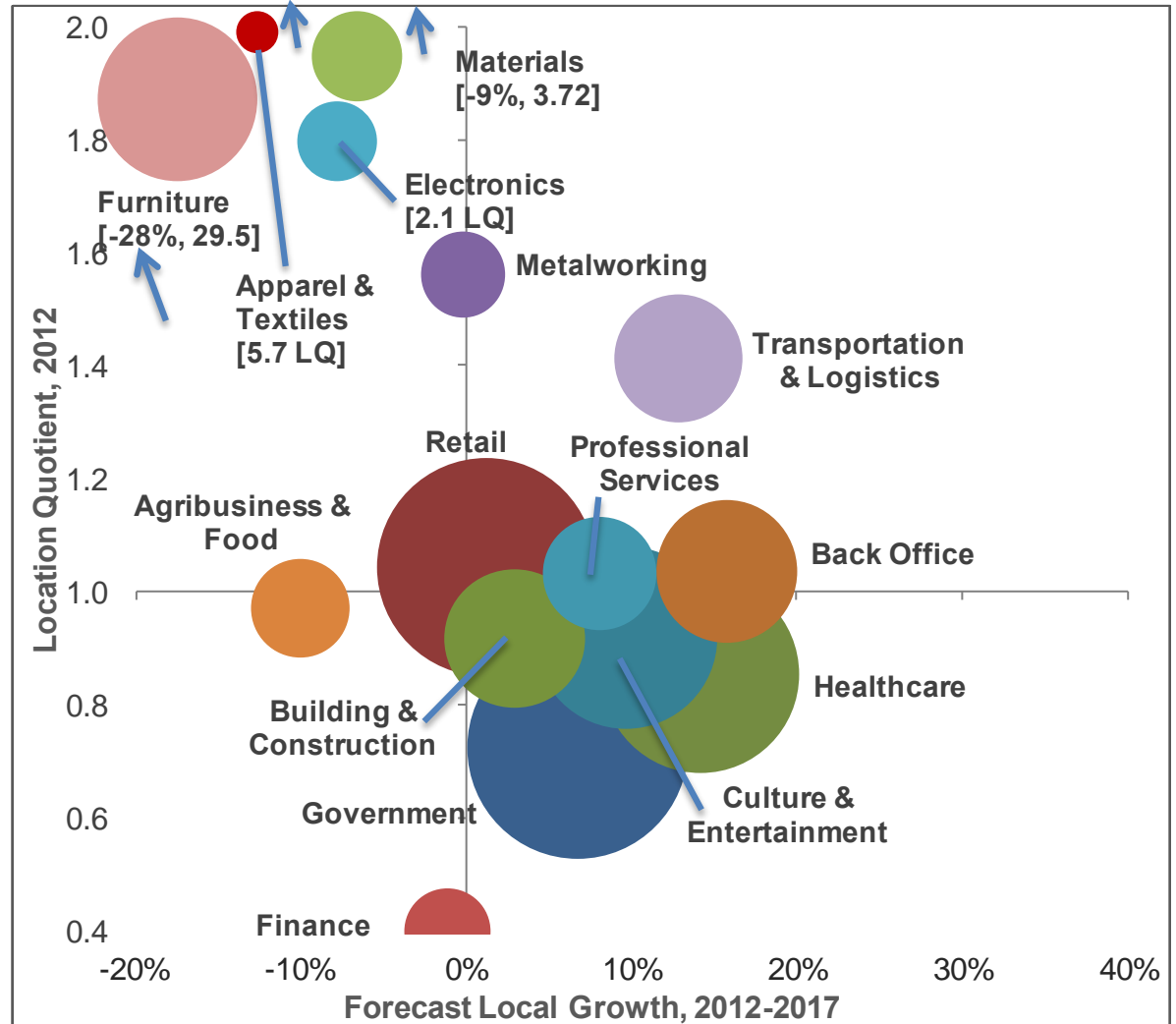
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (40% forecast growth), Automotive (21%), and Software/Info. Tech (17%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Furniture (LQ=29.52), Apparel & Textiles (5.66), and Materials (3.72). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Private Education, Research, and Software/Info. Tech.

Declining clusters include Furniture, which employs 7,100 workers, has an LQ of 29.52, and lost 37% of its employment base (4,200 jobs) in the last five years. Apparel & Textiles employs 2,000, LQ=5.66, and lost 55% (2,000 jobs). Retail employs 10,000, LQ=1.04, and lost 11% (1,200 jobs).

Industry Clusters: Catawba County, NC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CATAWBA COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	5	0.02		5	0	0.0%	0.2%
Agribusiness & Food	2,037	0.97	-17.6%	(436)	(205)	-10.1%	1.9%
Apparel & Textiles	1,629	5.66	-55.0%	(1,991)	(190)	-11.7%	-20.1%
Automotive	915	1.60	5.5%	48	188	20.5%	-6.0%
Back Office	4,199	1.04	-7.6%	(344)	662	15.8%	8.3%
Biomedical Supplies & Labs	330	0.57	-10.6%	(39)	0	0.0%	8.0%
Building & Construction	4,049	0.92	-21.7%	(1,119)	119	2.9%	5.3%
Consumer Goods Mftg	262	0.73	-28.0%	(102)	(62)	-23.7%	-0.6%
Culture & Entertainment	7,088	0.92	-9.1%	(709)	685	9.7%	6.2%
Education	727	0.49	36.9%	196	28	3.9%	13.2%
Electronics	2,966	2.14	-24.5%	(965)	(232)	-7.8%	1.3%
Energy	400	0.48	-7.8%	(34)	(125)	-31.3%	-1.5%
Engineering, Design, & Content	899	0.46	-27.0%	(333)	53	5.9%	2.0%
Finance	1,549	0.40	-26.3%	(553)	(17)	-1.1%	3.2%
Furniture	7,124	29.52	-37.3%	(4,243)	(1,970)	-27.7%	-3.5%
Government	10,211	0.72	-3.1%	(327)	692	6.8%	4.0%
Healthcare	8,154	0.85	4.0%	316	1,160	14.2%	11.8%
Industrial Machinery	1,120	0.69	-13.6%	(176)	(69)	-6.2%	-1.2%
Logging & Metal/Mineral Mining	46	0.43	0.0%	0	(4)	-8.7%	-2.2%
Materials	3,541	3.72	-16.2%	(687)	(310)	-8.8%	-7.2%
Metalworking	1,488	1.56	-16.0%	(283)	(2)	-0.1%	-5.1%
Non-Profits	201	0.26	-53.3%	(229)	(17)	-8.5%	6.3%
Professional Services	2,679	1.03	6.0%	151	217	8.1%	5.5%
Research	401	0.39	56.6%	145	160	39.9%	21.5%
Retail	10,001	1.04	-10.6%	(1,187)	117	1.2%	3.3%
Shipbuilding	0	0.00		0	0		-6.0%
Software / Info. Tech.	211	0.16	55.1%	75	36	17.1%	16.5%
Telecom Services	247	0.52	0.8%	2	(32)	-13.0%	-2.0%
Transportation & Logistics	3,353	1.41	-9.1%	(336)	430	12.8%	4.6%
Total	75,769	1.00	-15.0%	(13,371)	1,291	1.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

CLEVELAND COUNTY, NC

Cleveland County's three **largest clusters** by employment size are Healthcare (5,400 employees), Retail (4,000), and Culture & Entertainment (2,500).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Transportation & Logistics (49% growth, 700 new jobs), Private Education (16% growth, 100 new jobs), and Research (31% growth, 50 new jobs).

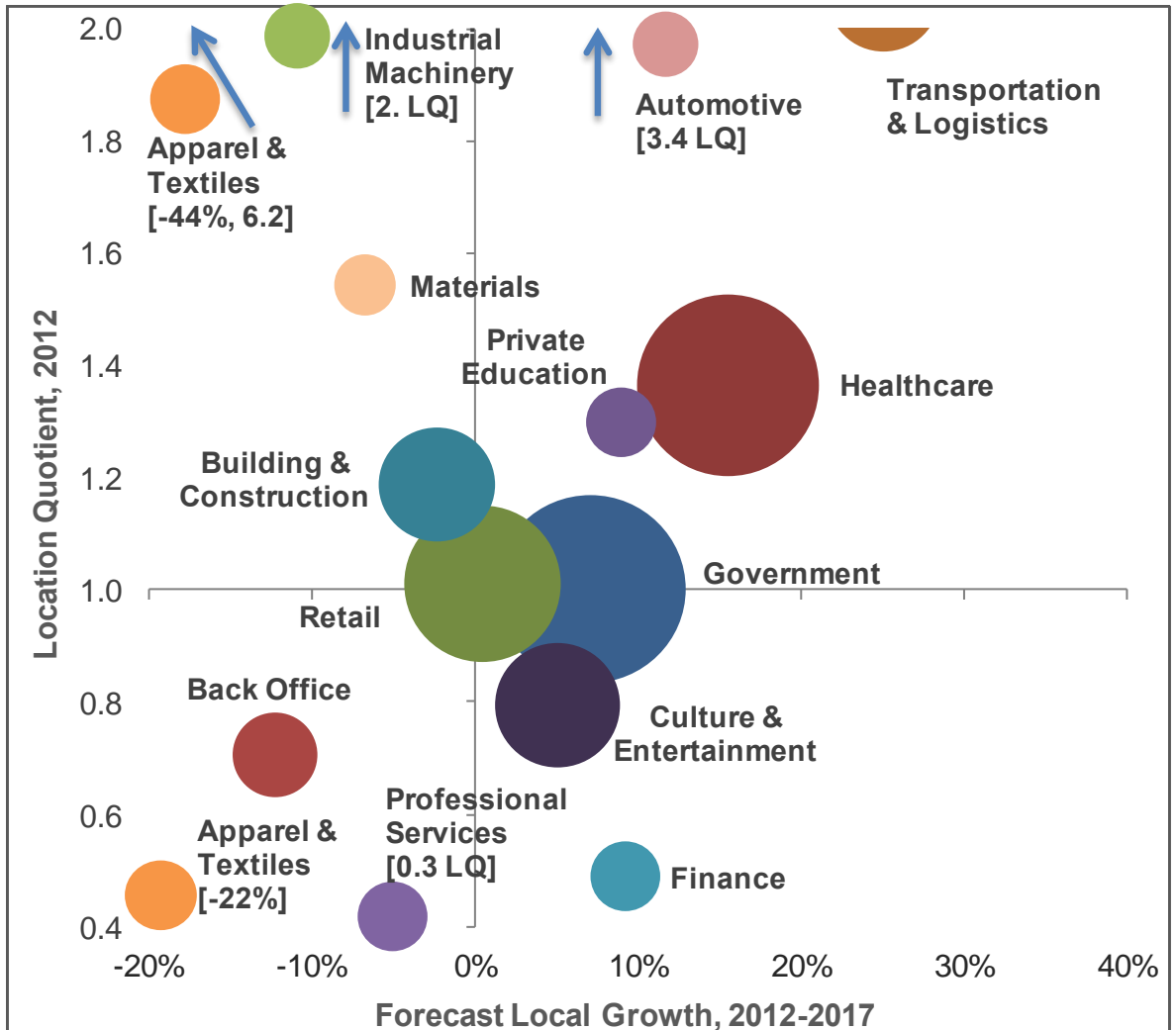
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Furniture (73% forecast growth), Research (38%), and Software/Info. Tech (30%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=6.17), Automotive (3.42), and Aerospace (2.47). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Software/Info. Tech, Biomedical Supplies & Labs, and Research.

Declining clusters include Building & Construction, which employs 2,200 workers, has an LQ of 1.19, and lost 22% of its employment base (600 jobs) in the last five years. Industrial Machinery employs 1,400, LQ=2.09, and lost 27% (500 jobs). Back Office employs 1,200, LQ=0.71, and lost 25% (400 jobs).

Industry Clusters: Cleveland County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CLEVELAND COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	281	●	2.47	-30.6%	(124)	(93)	-33.1%	0.2%
Agribusiness & Food	337	○	0.39	-2.0%	(7)	(18)	-5.3%	1.9%
Apparel & Textiles	734	●	6.17	-34.6%	(388)	(322)	-43.9%	-20.1%
Automotive	808	●	3.42	-30.3%	(352)	102	12.6%	-6.0%
Back Office	1,182	◐	0.71	-25.0%	(393)	(146)	-12.4%	8.3%
Biomedical Supplies & Labs	93	○	0.39	32.9%	23	13	14.0%	8.0%
Building & Construction	2,169	◐	1.19	-21.9%	(607)	(51)	-2.4%	5.3%
Consumer Goods Mfg	29	○	0.20	-75.2%	(88)	(10)	-34.5%	-0.6%
Culture & Entertainment	2,537	◐	0.80	-5.0%	(133)	127	5.0%	6.2%
Education	797	◐	1.30	15.5%	107	71	8.9%	13.2%
Electronics	243	○	0.42	-56.8%	(319)	(58)	-23.9%	1.3%
Energy	93	○	0.27	-44.6%	(75)	(50)	-53.8%	-1.5%
Engineering, Design, & Content	386	○	0.48	-30.8%	(172)	(86)	-22.3%	2.0%
Finance	791	○	0.49	0.3%	2	73	9.2%	3.2%
Furniture	246	●	2.47	-19.9%	(61)	179	72.8%	-3.5%
Government	5,833	◐	1.00	-5.7%	(354)	413	7.1%	4.0%
Healthcare	5,386	◐	1.36	-2.2%	(122)	837	15.5%	11.8%
Industrial Machinery	1,408	●	2.09	-27.0%	(520)	(138)	-9.8%	-1.2%
Logging & Metal/Mineral Mining	84	◐	1.88	-19.2%	(20)	13	15.5%	-2.2%
Materials	606	◐	1.54	-26.8%	(222)	(41)	-6.8%	-7.2%
Metalworking	331	◐	0.84	3.4%	11	66	19.9%	-5.1%
Non-Profits	288	◐	0.92	12.5%	32	31	10.8%	6.3%
Professional Services	363	○	0.34	12.7%	41	(20)	-5.5%	5.5%
Research	201	○	0.47	30.5%	47	76	37.8%	21.5%
Retail	3,999	◐	1.01	-4.8%	(202)	18	0.5%	3.3%
Shipbuilding	5	○	0.17	-76.2%	(16)	0	0.0%	-6.0%
Software / Info. Tech.	71	○	0.13	173.1%	45	21	29.6%	16.5%
Telecom Services	22	○	0.11	-45.0%	(18)	(12)	-54.5%	-2.0%
Transportation & Logistics	2,017	●	2.06	48.6%	660	506	25.1%	4.6%
Total	31,290		1.00	-9.6%	(3,332)	1,445	4.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

GASTON COUNTY, NC

Gaston County's three **largest clusters** by employment size are Healthcare (11,000 employees), Retail (10,000), and Culture & Entertainment (6,400).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Back Office (19% growth, 700 new jobs), Research (54% growth, 170 new jobs), and Biomedical Supplies & Labs (69% growth, 100 new jobs).

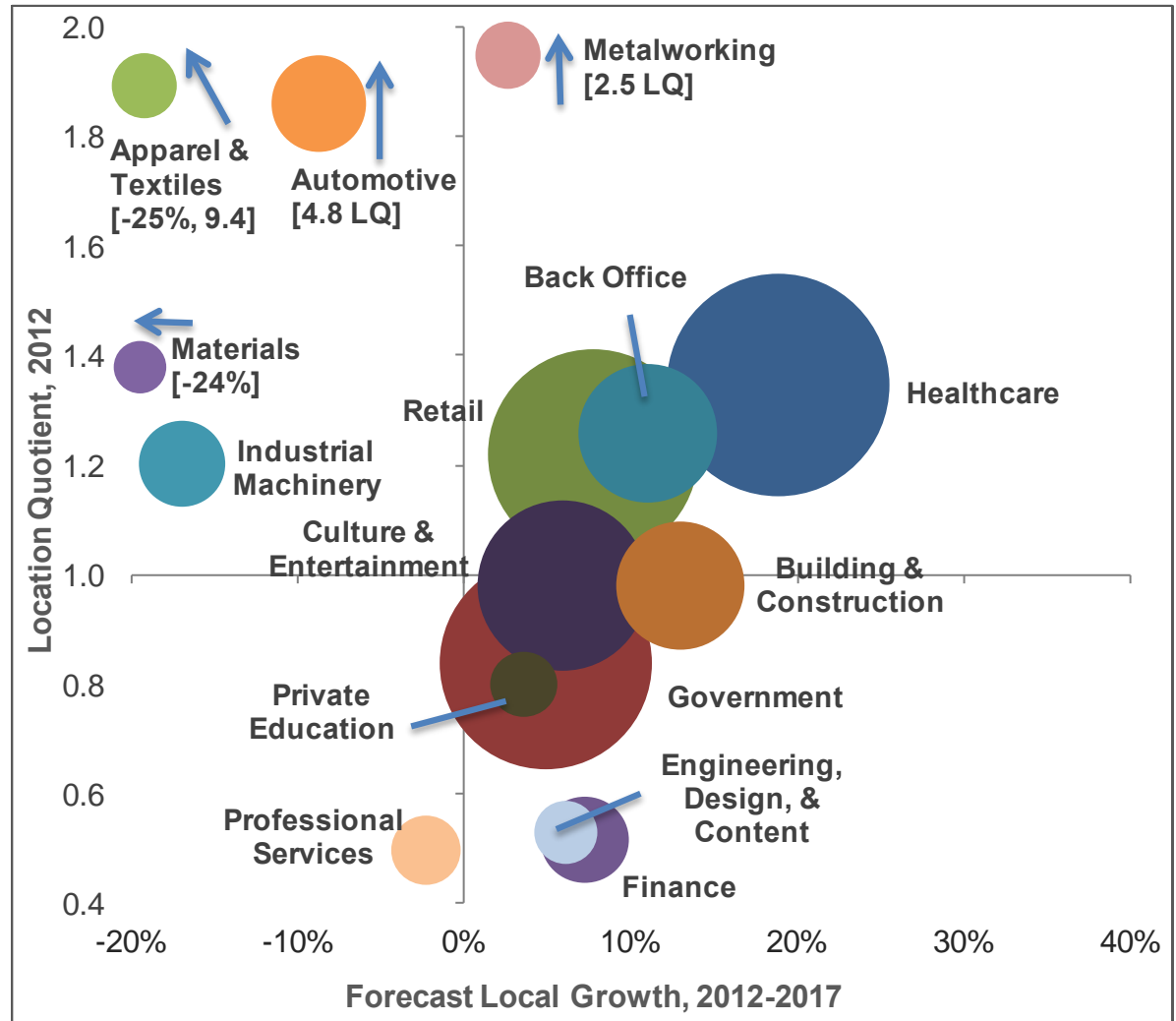
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (51% forecast growth), Biomedical Supplies & Labs (41%), and Healthcare (19%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=9.42), Automotive (4.82), and Metalworking (2.45). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Research, Biomedical Supplies & Labs, and Telecom Services.

Declining clusters include Automotive, which employs 2,350 workers, has an LQ of 1.19, and lost 45% of its employment base (1,950 jobs) in the last five years. Apparel & Textiles employs 2,310, LQ=9.42, and lost 45% (1,910 jobs). Building & Construction employs 3,680, LQ=0.98, and lost 24% (1,160 jobs).

Industry Clusters: Gaston County, NC



Source: Avalanche Consulting using data from EMSI

Industry Cluster Competitiveness

GASTON COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	17	○ 0.07	-54.1%	(20)	(12)	-70.6%	0.2%
Agribusiness & Food	636	○ 0.36	-4.6%	(31)	(59)	-9.3%	1.9%
Apparel & Textiles	2,309	● 9.42	-45.2%	(1,907)	(571)	-24.7%	-20.1%
Automotive	2,346	● 4.82	-45.3%	(1,945)	(256)	-10.9%	-6.0%
Back Office	4,340	● 1.26	19.4%	705	478	11.0%	8.3%
Biomedical Supplies & Labs	233	○ 0.47	68.8%	95	96	41.2%	8.0%
Building & Construction	3,681	● 0.98	-23.9%	(1,158)	477	13.0%	5.3%
Consumer Goods Mftg	490	● 1.60	-6.8%	(36)	(21)	-4.3%	-0.6%
Culture & Entertainment	6,436	● 0.98	2.3%	145	381	5.9%	6.2%
Education	1,011	● 0.80	40.0%	289	36	3.6%	13.2%
Electronics	355	○ 0.30	-28.9%	(144)	(14)	-3.9%	1.3%
Energy	606	● 0.85	-16.2%	(117)	(112)	-18.5%	-1.5%
Engineering, Design, & Content	870	● 0.53	-8.3%	(79)	53	6.1%	2.0%
Finance	1,713	● 0.51	-6.4%	(118)	124	7.2%	3.2%
Furniture	573	● 2.79	-41.3%	(403)	(47)	-8.2%	-3.5%
Government	10,088	● 0.84	0.2%	21	500	5.0%	4.0%
Healthcare	10,950	● 1.35	3.9%	406	2,065	18.9%	11.8%
Industrial Machinery	1,668	● 1.20	-24.0%	(528)	(282)	-16.9%	-1.2%
Logging & Metal/Mineral Mining	10	○ 0.11	-79.6%	(39)	0	0.0%	-2.2%
Materials	1,125	● 1.39	-7.7%	(94)	(267)	-23.7%	-7.2%
Metalworking	1,990	● 2.45	-11.8%	(266)	13	0.7%	-5.1%
Non-Profits	561	● 0.87	-4.3%	(25)	44	7.8%	6.3%
Professional Services	1,097	○ 0.50	-1.0%	(11)	(25)	-2.3%	5.5%
Research	478	● 0.55	54.2%	168	245	51.3%	21.5%
Retail	9,948	● 1.22	-3.4%	(355)	774	7.8%	3.3%
Shipbuilding	0	○ 0.00		0	0		-6.0%
Software / Info. Tech.	102	○ 0.09	-22.1%	(29)	10	9.8%	16.5%
Telecom Services	238	● 0.59	30.8%	56	(17)	-7.1%	-2.0%
Transportation & Logistics	723	○ 0.36	-41.0%	(503)	73	10.1%	4.6%
Total	64,501	1.00	-8.8%	(6,217)	3,668	5.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

IREDELL COUNTY, NC

Iredell County's three **largest clusters** by employment size are Retail (8,700 employees), Culture & Entertainment (8,300), and Healthcare (7,300).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Professional Services (55% growth, 1,700 new jobs), Back Office (13% growth, 400 new jobs), and Energy (53% growth, 120 new jobs).

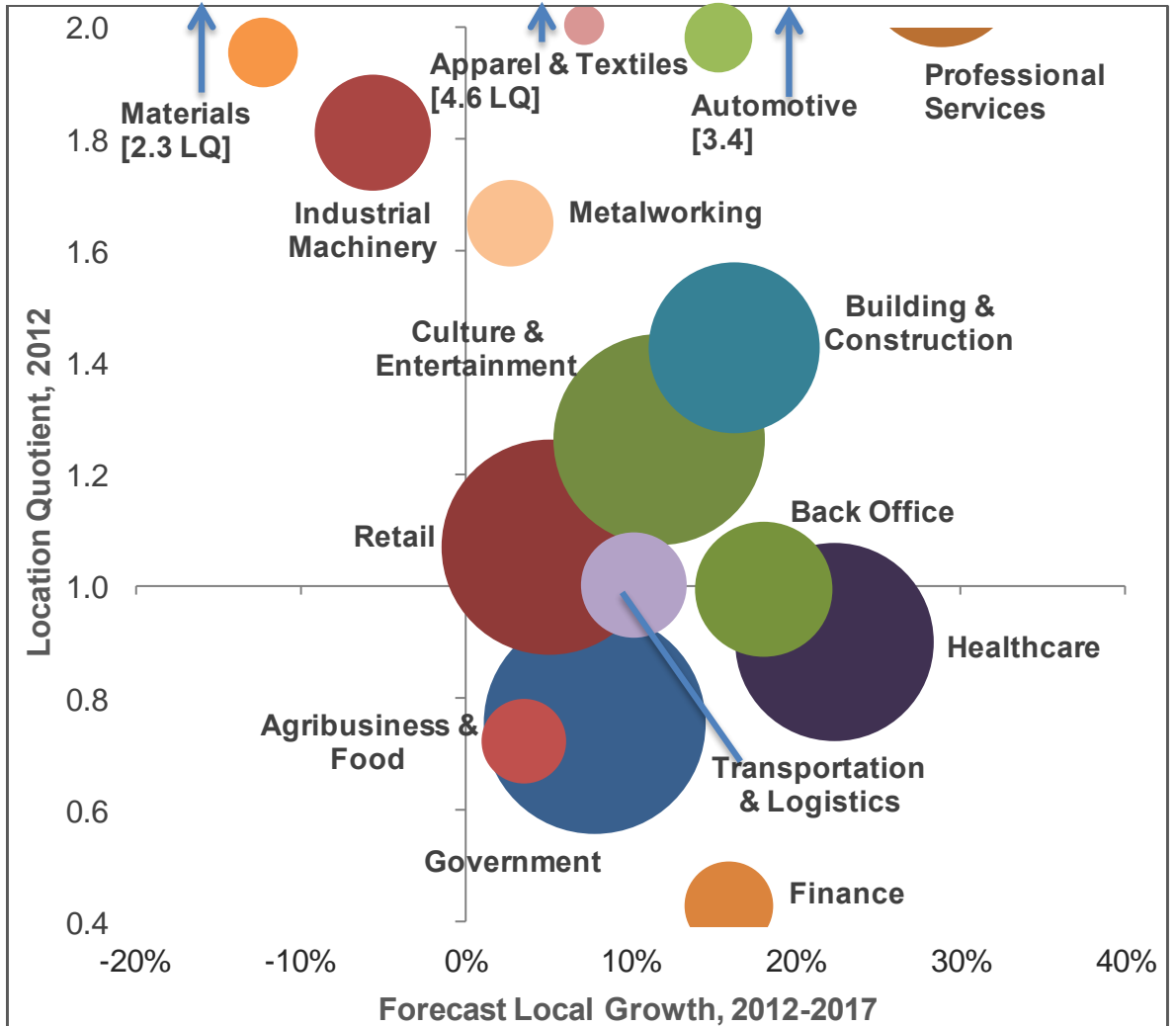
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Telecom Services (38% forecast growth), Logging & Metal/Mineral Mining (33%), and Professional Services (29%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=4.57), Automotive (3.38), and Materials (2.32). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Software/ Info. Tech, Energy, and Private Education.

Declining clusters include Building & Construction, which employs 5,400 workers, has an LQ of 1.43, and lost 23% of its employment base (1,600 jobs) in the last five years. Furniture employs 200, LQ=0.87, and lost 62% (300 jobs). Non-Profits employ 200, LQ=0.37, and lost 52% (260 jobs).

Industry Clusters: Iredell County, NC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

IREDELL COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	5	○	0.02	-82.8%	(24)	0	0.0%	0.2%
Agribusiness & Food	1,285	◐	0.72	6.8%	82	46	3.6%	1.9%
Apparel & Textiles	1,115	●	4.57	-41.3%	(784)	141	12.6%	-20.1%
Automotive	1,639	●	3.38	-4.0%	(68)	232	14.2%	-6.0%
Back Office	3,420	◐	1.00	13.2%	400	620	18.1%	8.3%
Biomedical Supplies & Labs	302	◐	0.61	-0.7%	(2)	(25)	-8.3%	8.0%
Building & Construction	5,348	◐	1.43	-22.6%	(1,563)	874	16.3%	5.3%
Consumer Goods Mfg	403	◐	1.32	-20.4%	(103)	43	10.7%	-0.6%
Culture & Entertainment	8,262	◐	1.26	-1.9%	(162)	969	11.7%	6.2%
Education	628	○	0.50	31.9%	152	105	16.7%	13.2%
Electronics	718	◐	0.61	-5.5%	(42)	62	8.6%	1.3%
Energy	343	○	0.48	53.1%	119	75	21.9%	-1.5%
Engineering, Design, & Content	756	○	0.46	9.4%	65	97	12.8%	2.0%
Finance	1,414	○	0.43	-2.2%	(32)	226	16.0%	3.2%
Furniture	178	◐	0.87	-62.2%	(293)	(108)	-60.7%	-3.5%
Government	9,017	◐	0.75	-2.2%	(206)	705	7.8%	4.0%
Healthcare	7,288	◐	0.90	7.3%	497	1,636	22.4%	11.8%
Industrial Machinery	2,508	◐	1.81	-19.3%	(598)	(142)	-5.7%	-1.2%
Logging & Metal/Mineral Mining	70	◐	0.76	-7.9%	(6)	23	32.9%	-2.2%
Materials	1,872	●	2.32	-24.4%	(603)	(187)	-10.0%	-7.2%
Metalworking	1,332	◐	1.65	-27.6%	(509)	36	2.7%	-5.1%
Non-Profits	238	○	0.37	-52.3%	(261)	(17)	-7.1%	6.3%
Professional Services	4,641	●	2.11	55.4%	1,654	1,340	28.9%	5.5%
Research	353	○	0.40	-25.8%	(123)	71	20.1%	21.5%
Retail	8,686	◐	1.07	-3.1%	(281)	441	5.1%	3.3%
Shipbuilding	5	○	0.08	0.0%	0	(5)	-100.0%	-6.0%
Software / Info. Tech.	218	○	0.20	34.6%	56	50	22.9%	16.5%
Telecom Services	191	○	0.47	6.1%	11	72	37.7%	-2.0%
Transportation & Logistics	2,016	◐	1.00	2.5%	49	206	10.2%	4.6%
Total	64,209		1.00	-4.3%	(2,914)	7,534	11.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

LINCOLN COUNTY, NC

Lincoln County's three **largest clusters** by employment size are Retail (2,900 employees), Building & Construction (2,200), and Culture & Entertainment (2,200).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Research (263% growth, 100 new jobs), Agribusiness & Food (74% growth, 90 new jobs), and Software/Info. Tech (19% growth, 30 new jobs).

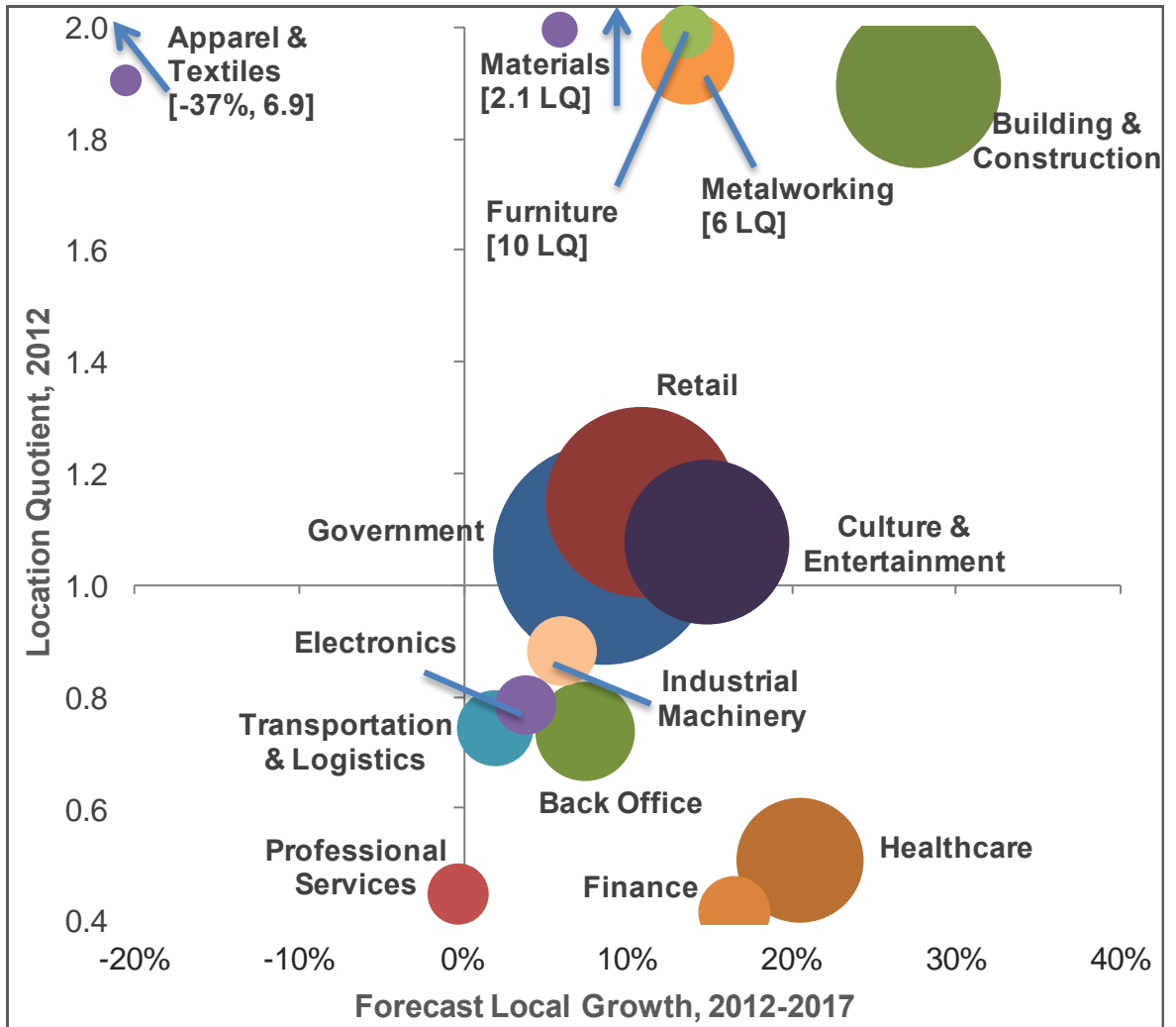
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Automotive (74% forecast growth), Research (42%), and Non-Profits (35%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Furniture (LQ=10.74), Apparel & Textiles (6.90), and Metalworking (6.08). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Research, Software/Info. Tech, and Agribusiness/Food.

Declining clusters include Building & Construction, which employs 2,200 workers, has an LQ of 1.89, and lost 33% of its employment base (1,100 jobs) in the last five years. Furniture employs 700, LQ=10.74, and lost 50% (700 jobs). Apparel & Textiles employs 500, LQ=6.90, and lost 53% (600 jobs).

Industry Clusters: Lincoln County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

LINCOLN COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	0	○	0.00	0	0		0.2%
Agribusiness & Food	204	○	0.37	87	45	22.1%	1.9%
Apparel & Textiles	529	●	6.90	(594)	(198)	-37.4%	-20.1%
Automotive	237	●	1.56	77	176	74.3%	-6.0%
Back Office	798	◐	0.74	(300)	59	7.4%	8.3%
Biomedical Supplies & Labs	244	●	1.57	26	76	31.1%	8.0%
Building & Construction	2,232	●	1.89	(1,087)	618	27.7%	5.3%
Consumer Goods Mftg	39	○	0.41	1	7	17.9%	-0.6%
Culture & Entertainment	2,214	◐	1.08	248	329	14.9%	6.2%
Education	228	◐	0.58	79	53	23.2%	13.2%
Electronics	290	◐	0.79	69	11	3.8%	1.3%
Energy	75	○	0.34	(80)	(12)	-16.0%	-1.5%
Engineering, Design, & Content	197	○	0.38	(73)	39	19.8%	2.0%
Finance	431	○	0.41	(91)	71	16.5%	3.2%
Furniture	690	●	10.74	(693)	103	14.9%	-3.5%
Government	3,970	◐	1.06	(5)	340	8.6%	4.0%
Healthcare	1,290	◐	0.51	135	264	20.5%	11.8%
Industrial Machinery	383	◐	0.88	(120)	23	6.0%	-1.2%
Logging & Metal/Mineral Mining	71	●	2.47	10	7	9.9%	-2.2%
Materials	542	●	2.14	127	30	5.5%	-7.2%
Metalworking	1,543	●	6.08	(538)	238	15.4%	-5.1%
Non-Profits	37	○	0.18	(98)	13	35.1%	6.3%
Professional Services	309	○	0.45	15	(1)	-0.3%	5.5%
Research	156	◐	0.57	113	65	41.7%	21.5%
Retail	2,929	●	1.15	277	317	10.8%	3.3%
Shipbuilding	5	○	0.26	5	0	0.0%	-6.0%
Software / Info. Tech.	57	○	0.17	31	10	17.5%	16.5%
Telecom Services	67	◐	0.53	2	20	29.9%	-2.0%
Transportation & Logistics	469	◐	0.74	(121)	9	1.9%	4.6%
Total	20,182		1.00	(2,634)	2,683	13.3%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

MECKLENBURG COUNTY, NC

Mecklenburg County's three **largest clusters** by employment size are Retail (62,400 employees), Culture & Entertainment (62,000), and Finance (56,700).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Healthcare (20% growth, 7,500 new jobs), Culture & Entertainment (12% growth, 6,600 new jobs), and Research (26% growth, 2,200 new jobs).

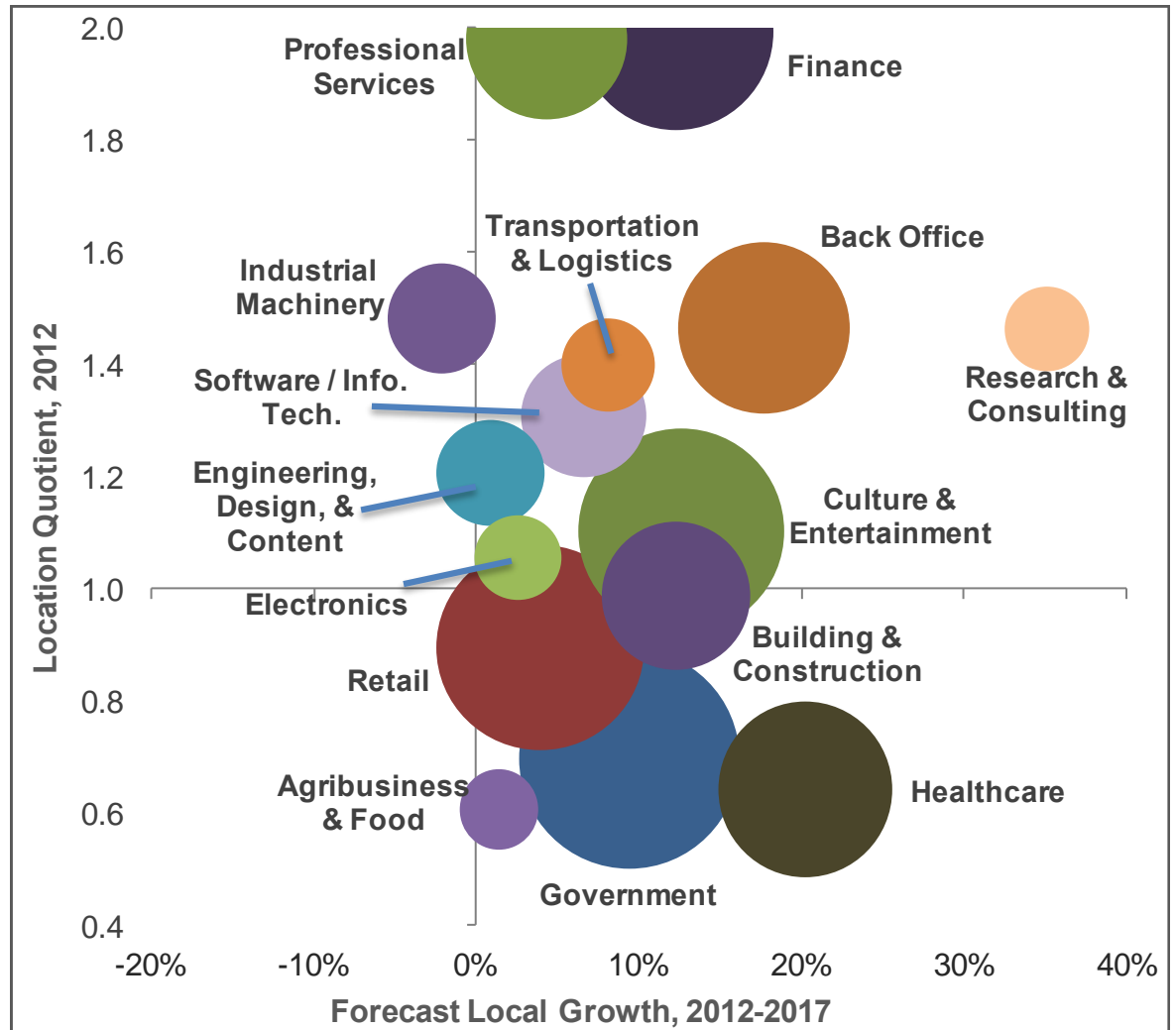
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (35% forecast growth), Biomedical Supplies & Labs (21%), and Healthcare (20%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Finance (LQ=1.99), Professional Services (1.98), and Industrial Machinery (1.48). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Aerospace, Biomedical Supplies & Labs, and Private Education.

Declining clusters include Building & Construction, which employs 31,800 workers, has an LQ of 0.99, and lost 33% of its employment base (15,400 jobs) in the last five years. Retail employs 62,400, LQ=0.89, and lost 8% (5,400 jobs). Finance employs 56,700, LQ=1.99, and lost 8% (4,600 jobs).

Industry Clusters: Mecklenburg County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

MECKLENBURG COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	179	○	0.09	32.6%	44	7	3.9%	0.2%
Agribusiness & Food	9,246	◐	0.61	-8.5%	(859)	126	1.4%	1.9%
Apparel & Textiles	2,101	◑	1.00	-12.4%	(297)	(386)	-18.4%	-20.1%
Automotive	1,950	○	0.47	-11.6%	(257)	(131)	-6.7%	-6.0%
Back Office	43,296	◑	1.47	-3.1%	(1,384)	7,645	17.7%	8.3%
Biomedical Supplies & Labs	2,627	◐	0.62	14.4%	330	540	20.6%	8.0%
Building & Construction	31,825	◑	0.99	-32.7%	(15,436)	3,918	12.3%	5.3%
Consumer Goods Mftg	1,955	◐	0.75	-11.3%	(250)	139	7.1%	-0.6%
Culture & Entertainment	61,963	◑	1.10	11.8%	6,553	7,788	12.6%	6.2%
Education	8,932	◐	0.83	28.8%	1,996	1,210	13.5%	13.2%
Electronics	10,657	◑	1.06	-3.1%	(338)	275	2.6%	1.3%
Energy	2,569	○	0.42	-16.5%	(509)	(546)	-21.3%	-1.5%
Engineering, Design, & Content	17,037	◑	1.21	-18.3%	(3,828)	143	0.8%	2.0%
Finance	56,731	◑	1.99	-7.5%	(4,584)	6,960	12.3%	3.2%
Furniture	1,519	◐	0.86	0.5%	8	254	16.7%	-3.5%
Government	71,677	◐	0.70	8.9%	5,848	6,746	9.4%	4.0%
Healthcare	44,690	◐	0.64	20.2%	7,519	9,051	20.3%	11.8%
Industrial Machinery	17,603	◑	1.48	-3.5%	(643)	(373)	-2.1%	-1.2%
Logging & Metal/Mineral Mining	215	○	0.27	-29.0%	(88)	13	6.0%	-2.2%
Materials	7,652	◑	1.10	-17.7%	(1,642)	(967)	-12.6%	-7.2%
Metalworking	3,466	○	0.50	-22.3%	(993)	(397)	-11.5%	-5.1%
Non-Profits	2,695	○	0.49	-47.4%	(2,431)	154	5.7%	6.3%
Professional Services	37,472	◑	1.98	3.2%	1,160	1,613	4.3%	5.5%
Research	10,963	◑	1.46	25.5%	2,231	3,846	35.1%	21.5%
Retail	62,409	◐	0.89	-7.9%	(5,374)	2,467	4.0%	3.3%
Shipbuilding	0	○	0.00		0	0		-6.0%
Software / Info. Tech.	13,074	◑	1.40	8.0%	969	1,063	8.1%	16.5%
Telecom Services	4,648	◑	1.34	-6.0%	(299)	(487)	-10.5%	-2.0%
Transportation & Logistics	22,605	◑	1.31	-12.7%	(3,303)	1,501	6.6%	4.6%
Total	551,707		1.00	-3.2%	(18,316)	52,150	9.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

ROWAN COUNTY, NC

Rowan County's three **largest clusters** by employment size are Healthcare (5,400 employees), Retail (4,600), and Culture & Entertainment (4,000).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Biomedical Supplies & Labs (265% growth, 100 new jobs), Engineering, Design, & Content (12% growth, 60 new jobs), and Telecom Services (17% growth, 10 new jobs).

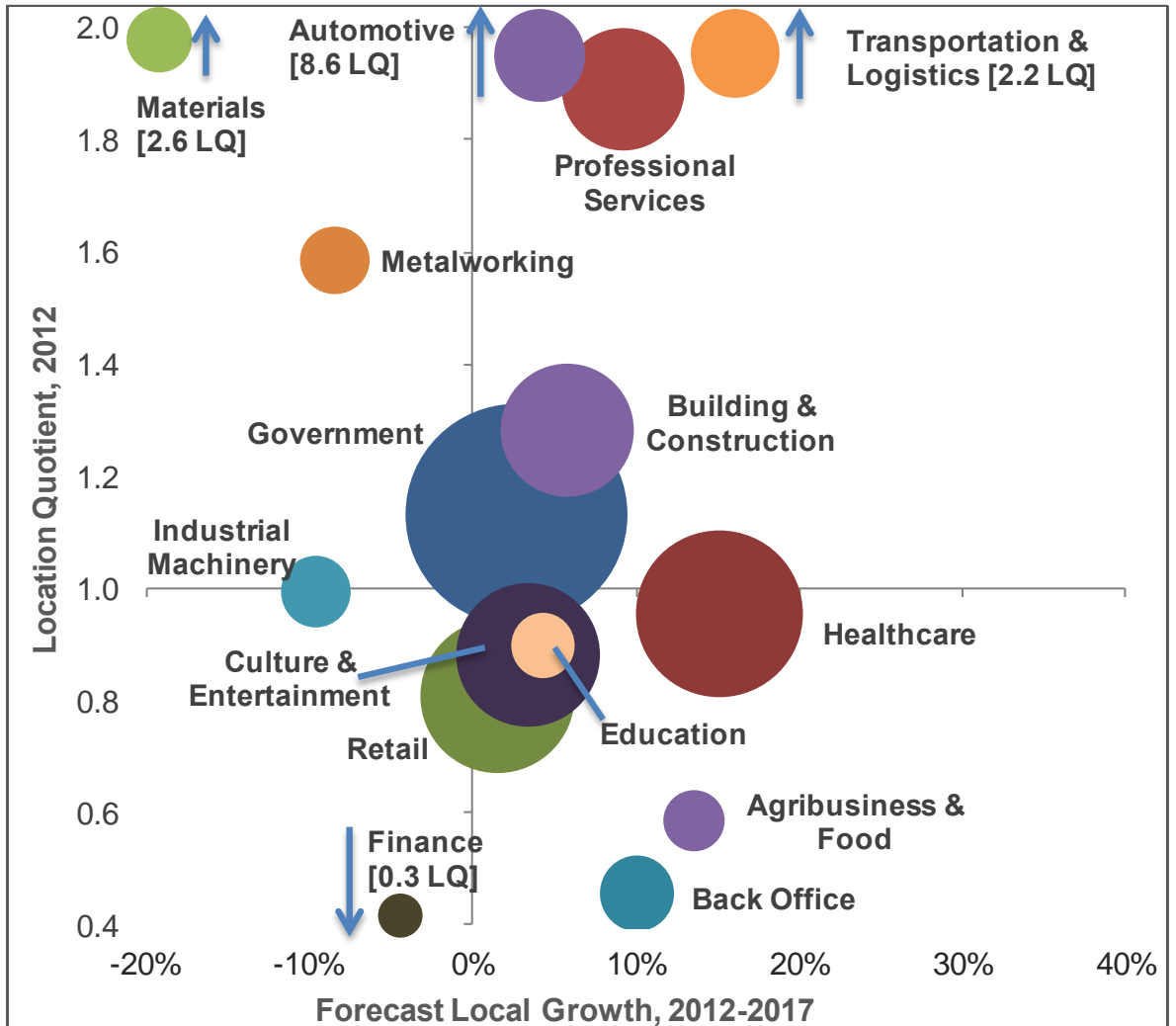
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Telecom Services (38% forecast growth), Biomedical Supplies & Labs (30%), and Non-Profits (22%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Automotive (LQ=8.64), Logging & Metal/Mineral Mining (3.12), and Materials (2.59). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Biomedical Supplies, Telecom Services, and Engineering.

Declining clusters include Building & Construction, which employs 3,400 workers, has an LQ of 1.28, and lost 30% of its employment base (1,400 jobs) in the last five years. Retail employs 4,600, LQ=0.81, and lost 8% (400 jobs). Materials employs 1,500, LQ=2.59, and lost 19% (400 jobs).

Industry Clusters: Rowan County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

ROWAN COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	5	○	0.03	5	0	0.0%	0.2%
Agribusiness & Food	728	◐	0.59	(203)	99	13.6%	1.9%
Apparel & Textiles	355	●	2.08	(314)	(123)	-34.6%	-20.1%
Automotive	2,927	●	8.64	(288)	132	4.5%	-6.0%
Back Office	1,095	○	0.46	(107)	110	10.0%	8.3%
Biomedical Supplies & Labs	135	○	0.39	98	40	29.6%	8.0%
Building & Construction	3,362	◐	1.28	(1,405)	193	5.7%	5.3%
Consumer Goods Mftg	152	◐	0.71	(200)	(10)	-6.6%	-0.6%
Culture & Entertainment	4,029	◐	0.88	163	136	3.4%	6.2%
Education	791	◐	0.90	61	34	4.3%	13.2%
Electronics	325	○	0.40	(82)	(44)	-13.5%	1.3%
Energy	277	◐	0.56	(33)	18	6.5%	-1.5%
Engineering, Design, & Content	567	○	0.49	60	62	10.9%	2.0%
Finance	757	○	0.33	(158)	(23)	-3.0%	3.2%
Furniture	121	◐	0.85	(290)	(31)	-25.6%	-3.5%
Government	9,468	●	1.13	251	248	2.6%	4.0%
Healthcare	5,409	◐	0.95	200	816	15.1%	11.8%
Industrial Machinery	961	◐	0.99	(5)	(93)	-9.7%	-1.2%
Logging & Metal/Mineral Mining	200	●	3.12	(80)	(51)	-25.5%	-2.2%
Materials	1,461	●	2.59	(349)	(247)	-16.9%	-7.2%
Metalworking	895	◐	1.58	82	(76)	-8.5%	-5.1%
Non-Profits	205	○	0.46	(312)	44	21.5%	6.3%
Professional Services	2,911	◐	1.89	(24)	268	9.2%	5.5%
Research	79	○	0.13	3	10	12.7%	21.5%
Retail	4,584	◐	0.81	(391)	66	1.4%	3.3%
Shipbuilding	0	○	0.00	0	0		-6.0%
Software / Info. Tech.	46	○	0.06	(6)	(15)	-32.6%	16.5%
Telecom Services	95	○	0.34	14	36	37.9%	-2.0%
Transportation & Logistics	3,062	●	2.18	(28)	433	14.1%	4.6%
Total	44,922		1.00	(3,518)	2,023	4.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

STANLY COUNTY, NC

Stanly County's three **largest clusters** by employment size are Healthcare (3,100 employees), Retail (2,900), and Culture & Entertainment (1,800).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Retail (10% growth, 300 new jobs), Research (460% growth, 20 new jobs), and Telecom Services (66% growth, 20 new jobs).

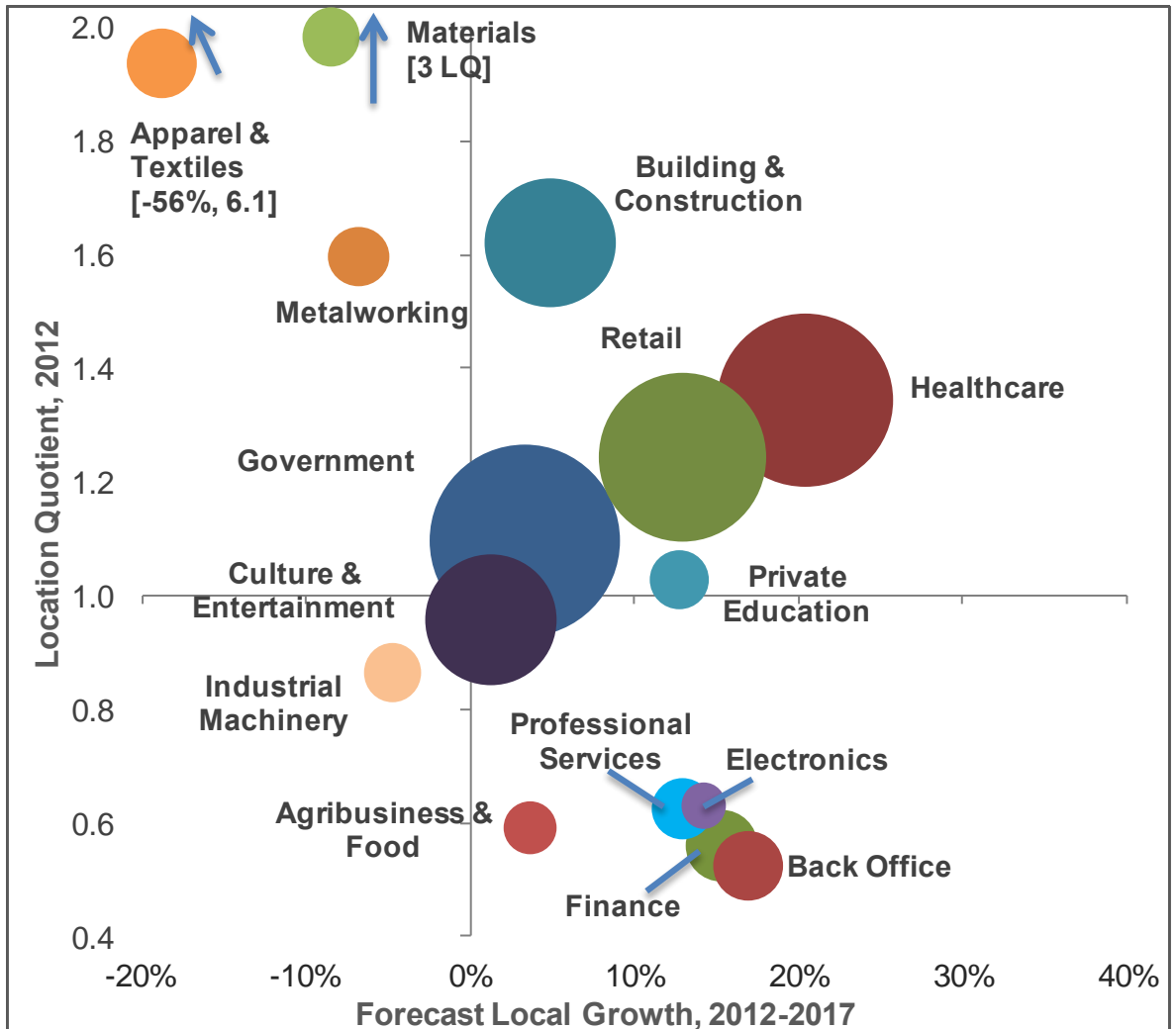
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Automotive (56% forecast growth), Research (40%), and Telecom Services (26%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=6.13), Materials (2.97), and Furniture (2.83). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Research, Consumer Goods Manufacturing, and Telecom Services.

Declining clusters include Apparel & Textiles, which employs 500 workers, has an LQ of 19.68, and lost 65% of its employment base (800 jobs) in the last five years. Metalworking employs 70, LQ=0.96, and lost 81% (300 jobs). Professional Services employs 50, LQ=0.25, and lost 57% (70 jobs).

Industry Clusters: Stanly County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

STANLY COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	38	0.57	8.6%	3	(11)	-28.9%	0.2%
Agribusiness & Food	300	0.59	-5.7%	(18)	11	3.7%	1.9%
Apparel & Textiles	427	6.13	-58.2%	(595)	(240)	-56.2%	-20.1%
Automotive	72	0.52	-59.3%	(105)	40	55.6%	-6.0%
Back Office	514	0.52	-12.4%	(73)	87	16.9%	8.3%
Biomedical Supplies & Labs	45	0.32	7.1%	3	3	6.7%	8.0%
Building & Construction	1,733	1.62	-37.3%	(1,032)	84	4.8%	5.3%
Consumer Goods Mfg	20	0.23	100.0%	10	4	20.0%	-0.6%
Culture & Entertainment	1,790	0.96	-1.3%	(24)	23	1.3%	6.2%
Education	370	1.03	14.9%	48	47	12.7%	13.2%
Electronics	211	0.63	31.9%	51	30	14.2%	1.3%
Energy	97	0.48	-3.0%	(3)	2	2.1%	-1.5%
Engineering, Design, & Content	153	0.33	-22.3%	(44)	19	12.4%	2.0%
Finance	529	0.56	33.6%	133	81	15.3%	3.2%
Furniture	165	2.83	-61.2%	(260)	(112)	-67.9%	-3.5%
Government	3,747	1.10	-2.9%	(112)	123	3.3%	4.0%
Healthcare	3,110	1.35	11.2%	313	635	20.4%	11.8%
Industrial Machinery	341	0.86	-24.4%	(110)	(16)	-4.7%	-1.2%
Logging & Metal/Mineral Mining	44	1.68	-15.4%	(8)	0	0.0%	-2.2%
Materials	684	2.97	-12.5%	(98)	(49)	-7.2%	-7.2%
Metalworking	368	1.60	-20.0%	(92)	(25)	-6.8%	-5.1%
Non-Profits	200	1.09	-1.0%	(2)	41	20.5%	6.3%
Professional Services	393	0.63	15.9%	54	51	13.0%	5.5%
Research	28	0.11	460.0%	23	11	39.3%	21.5%
Retail	2,880	1.24	9.9%	259	371	12.9%	3.3%
Shipbuilding	0	0.00		0	0		-6.0%
Software / Info. Tech.	26	0.08	13.0%	3	6	23.1%	16.5%
Telecom Services	58	0.51	65.7%	23	15	25.9%	-2.0%
Transportation & Logistics	95	0.17	-50.8%	(98)	(7)	-7.4%	4.6%
Total	18,327	1.00	-9.3%	(1,890)	1,201	6.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

UNION COUNTY, NC

Union County's three **largest clusters** by employment size are Retail (6,900 employees), Building & Construction (6,700), and Culture & Entertainment (4,500).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Telecom Services (326% growth, 300 new jobs), Research (111% growth, 200 new jobs), and Aerospace (189% growth, 50 new jobs).

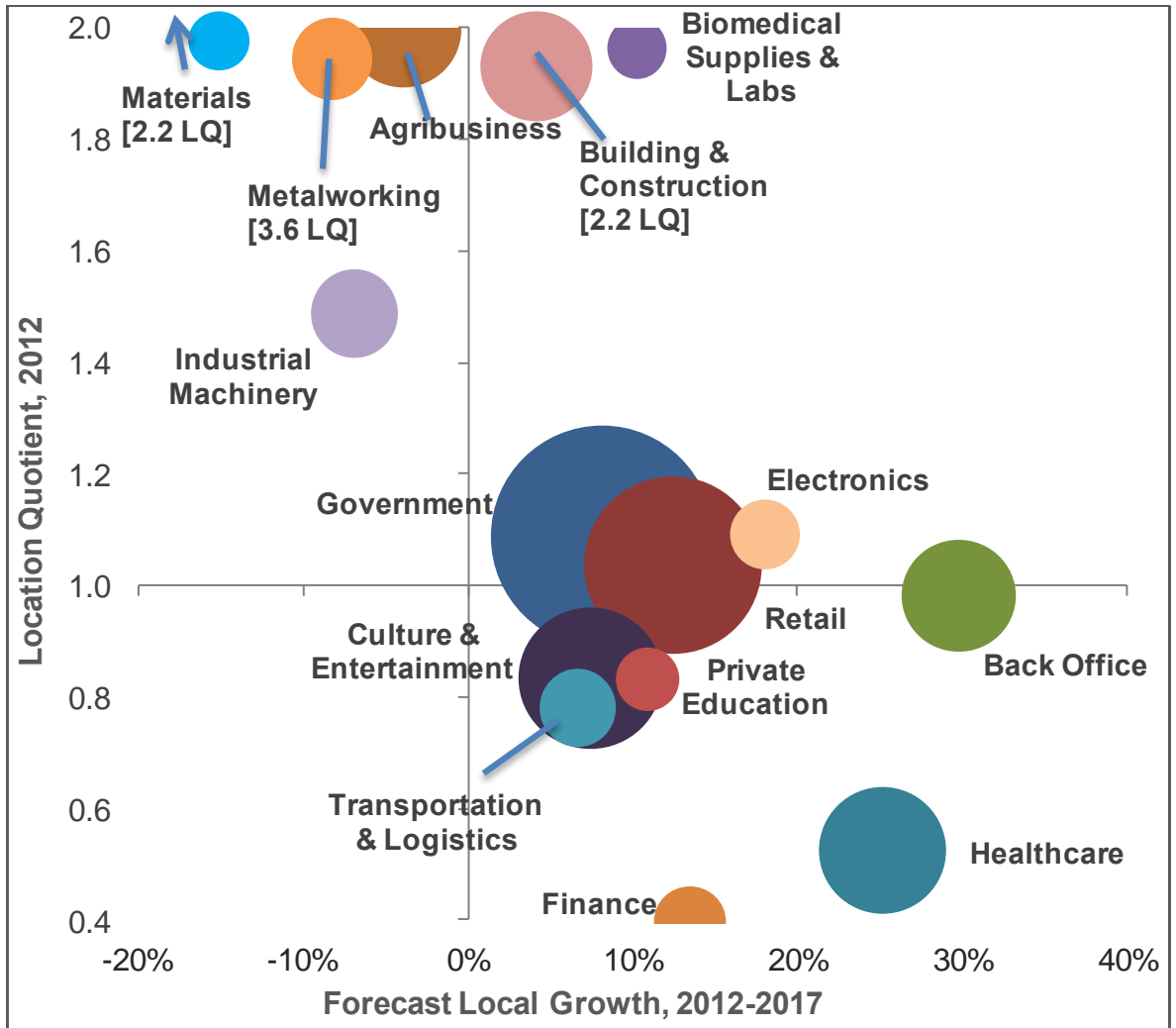
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Automotive (55% forecast growth), Telecom Services (53%), and Non-Profits (45%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Metalworking (LQ=3.59), Apparel & Textiles (2.71), and Building & Construction (2.17). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Research, Aerospace, and Professional Services.

Declining clusters include Building & Construction, which employs 6,700 workers, has an LQ of 2.17, and lost 44% of its employment base (5,300 jobs) in the last five years. Metalworking employs 2,400, LQ=3.59, and lost 21% (600 jobs). Apparel & Textiles employs 500, LQ=2.71, and lost 49% (500 jobs).

Industry Clusters: Union County, NC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

UNION COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	81	○	0.43	189.3%	53	24	29.6%	0.2%
Agribusiness & Food	2,897	●	2.00	-5.5%	(167)	(114)	-3.9%	1.9%
Apparel & Textiles	540	●	2.71	-49.2%	(523)	(333)	-61.7%	-20.1%
Automotive	222	◐	0.56	13.3%	26	123	55.4%	-6.0%
Back Office	2,750	◐	0.98	-2.3%	(64)	820	29.8%	8.3%
Biomedical Supplies & Labs	791	●	1.96	18.1%	121	81	10.2%	8.0%
Building & Construction	6,646	●	2.17	-44.3%	(5,282)	365	5.5%	5.3%
Consumer Goods Mfg	249	◐	1.00	-16.2%	(48)	(2)	-0.8%	-0.6%
Culture & Entertainment	4,451	◐	0.83	7.3%	303	331	7.4%	6.2%
Education	854	◐	0.83	-14.9%	(149)	93	10.9%	13.2%
Electronics	1,045	◐	1.09	16.2%	146	188	18.0%	1.3%
Energy	400	◐	0.69	-10.3%	(46)	(24)	-6.0%	-1.5%
Engineering, Design, & Content	704	◐	0.53	-29.7%	(298)	44	6.3%	2.0%
Finance	1,077	○	0.40	-17.2%	(224)	145	13.5%	3.2%
Furniture	321	●	1.92	-43.2%	(244)	(81)	-25.2%	-3.5%
Government	10,612	◐	1.09	2.4%	251	869	8.2%	4.0%
Healthcare	3,463	◐	0.52	9.2%	293	871	25.2%	11.8%
Industrial Machinery	1,678	●	1.49	-19.5%	(407)	(116)	-6.9%	-1.2%
Logging & Metal/Mineral Mining	61	◐	0.82	-6.2%	(4)	2	3.3%	-2.2%
Materials	1,417	●	2.15	-14.3%	(236)	(139)	-9.8%	-7.2%
Metalworking	2,363	●	3.59	-21.2%	(636)	(43)	-1.8%	-5.1%
Non-Profits	76	○	0.14	8.6%	6	34	44.7%	6.3%
Professional Services	597	○	0.33	9.5%	52	38	6.4%	5.5%
Research	295	○	0.41	110.7%	155	116	39.3%	21.5%
Retail	6,866	◐	1.04	5.4%	349	852	12.4%	3.3%
Shipbuilding	0	○	0.00		0	0		-6.0%
Software / Info. Tech.	333	○	0.38	11.0%	33	46	13.8%	16.5%
Telecom Services	375	●	1.14	326.1%	287	197	52.5%	-2.0%
Transportation & Logistics	1,281	◐	0.78	1.9%	24	85	6.6%	4.6%
Total	52,376		1.00	-11.2%	(6,602)	4,456	8.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

CHESTER COUNTY, SC

Chester County's three **largest clusters** by employment size are Building & Construction (1,330 employees), Retail (990), and Culture & Entertainment (670).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Transportation & Logistics (62% growth, 140 new jobs), Agribusiness & Food (11% growth, 40 new jobs), and Engineering, Design, and Content (39% growth, 20 new jobs).

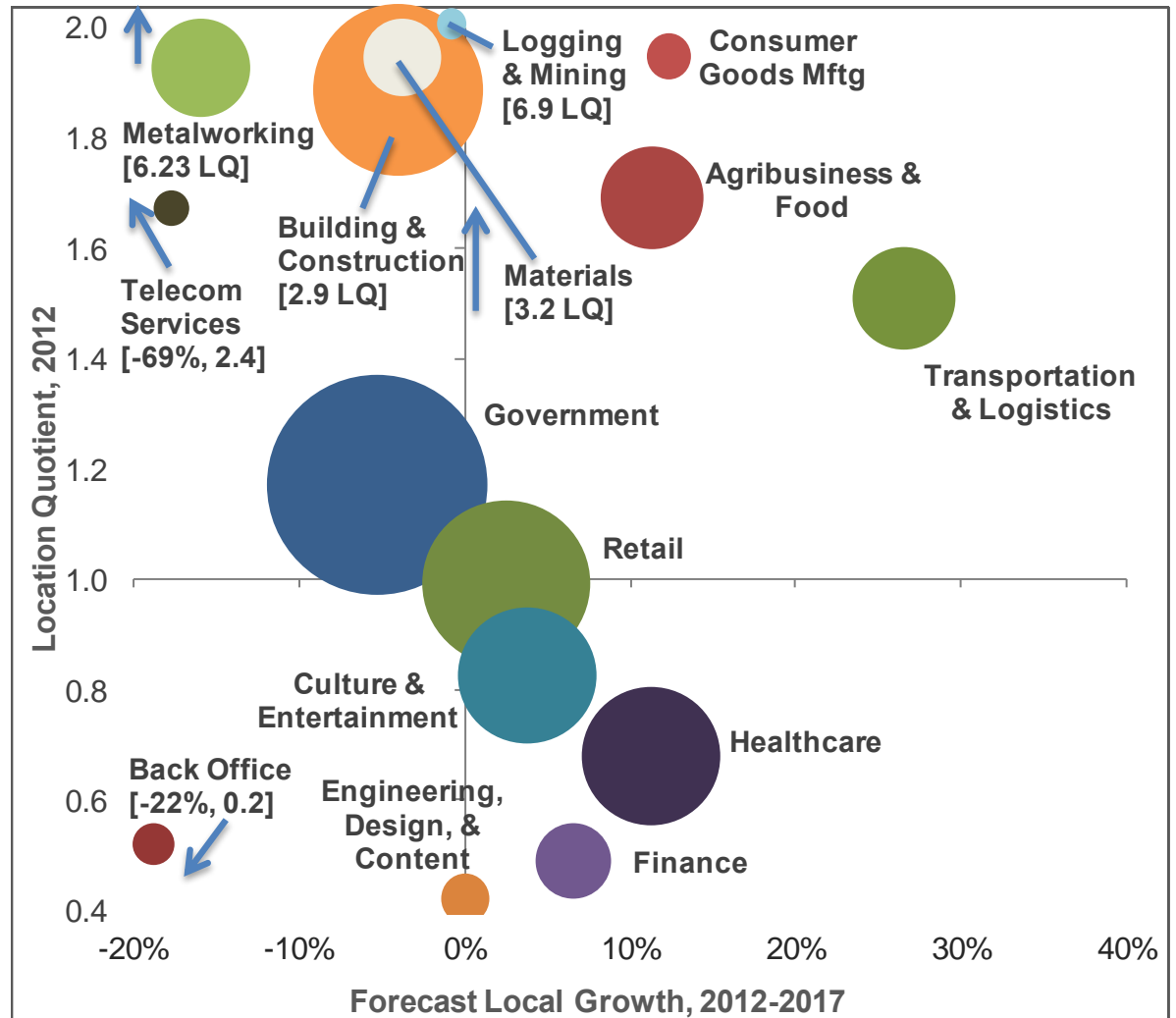
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (47% forecast growth), Transportation & Logistics (27%), and Non-Profits (25%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Logging & Metal/Mineral Mining (LQ=6.93), Metalworking (6.23), and Materials (3.17). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Energy, Non-Profits, and Shipbuilding.

Declining clusters include Building & Construction, which employs 1,300 workers, has an LQ of 2.89, and lost 30% of its employment base (570 jobs) in the last five years. Apparel & Textiles employs 50, LQ=1.50, and lost 91% (460 jobs). Metalworking employs 600, LQ=6.23, and lost 33% (300 jobs).

Industry Clusters: Chester County, SC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CHESTER COUNTY, SC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	0	○	0.00		0	0	0.2%
Agribusiness & Food	370	●	1.69	10.8%	36	42	11.4%
Apparel & Textiles	45	●	1.50	-91.0%	(455)	(40)	-88.9%
Automotive	0	○	0.00		0	0	-6.0%
Back Office	72	○	0.17	-74.4%	(209)	(16)	-22.2%
Biomedical Supplies & Labs	0	○	0.00	-100.0%	(5)	0	8.0%
Building & Construction	1,331	●	2.89	-30.1%	(572)	(52)	-3.9%
Consumer Goods Mftg	73	●	1.95	-2.7%	(2)	9	12.3%
Culture & Entertainment	665	●	0.83	-7.5%	(54)	25	3.8%
Education	5	○	0.03	0.0%	0	0	0.0%
Electronics	44	○	0.30	-78.6%	(162)	(6)	-13.6%
Energy	27	○	0.31	170.0%	17	(22)	-81.5%
Engineering, Design, & Content	85	○	0.42	39.3%	24	0	0.0%
Finance	199	○	0.49	-2.0%	(4)	13	6.5%
Furniture	0	○	0.00		0	0	-3.5%
Government	1,722	●	1.17	-12.6%	(249)	(92)	-5.3%
Healthcare	675	●	0.68	-2.9%	(20)	76	11.3%
Industrial Machinery	65	○	0.38	-54.9%	(79)	(6)	-9.2%
Logging & Metal/Mineral Mining	78	●	6.93	36.8%	21	0	0.0%
Materials	315	●	3.17	2.9%	9	(10)	-3.2%
Metalworking	619	●	6.23	-33.4%	(310)	(76)	-12.3%
Non-Profits	24	○	0.30	140.0%	14	6	25.0%
Professional Services	59	○	0.22	-25.3%	(20)	8	13.6%
Research	15	○	0.14	25.0%	3	7	46.7%
Retail	991	●	0.99	-4.8%	(50)	25	2.5%
Shipbuilding	11	●	1.48	120.0%	6	(6)	-54.5%
Software / Info. Tech.	10	○	0.07	-65.5%	(19)	0	0.0%
Telecom Services	118	●	2.38	7.3%	8	(81)	-68.6%
Transportation & Logistics	373	●	1.51	62.2%	143	99	26.5%
Total	7,900	1.00		-19.8%	(1,948)	(102)	-1.3%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

Chesterfield County's three **largest clusters** by employment size are Metalworking (2,300 employees), Retail (1,600 employees), and Healthcare (1,300 employees).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Retail (13% growth, 180 new jobs), Furniture (1060% growth, 50 new jobs), and Aerospace (growth from zero jobs, 130 new jobs).

The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Furniture (95% forecast growth), Aerospace (49%), and Telecom Services (32%). *[Note: Forecasts from EconomicModeling.com]*

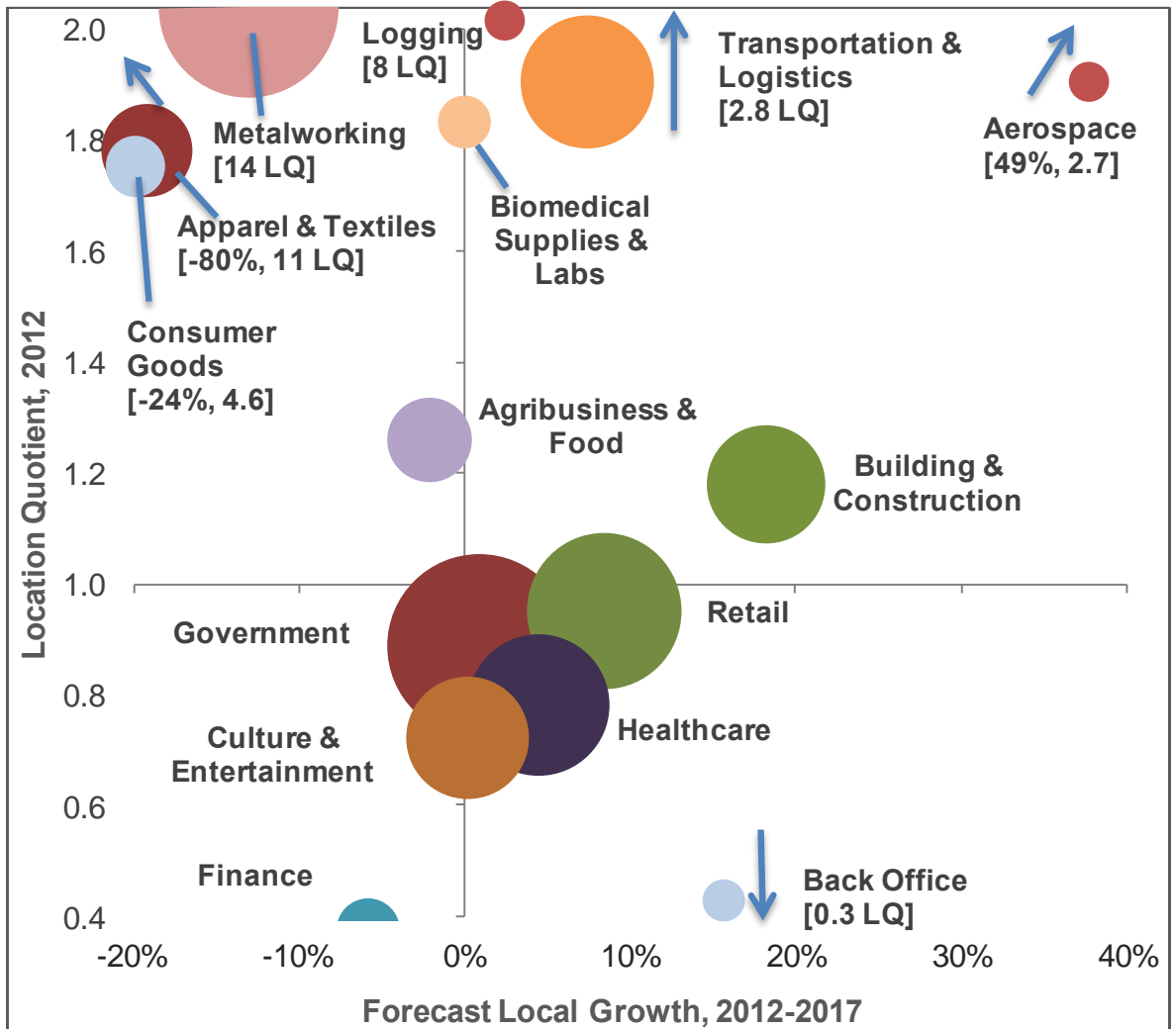
The county's **clusters with the highest concentration** (highest Location Quotient) are Metalworking (LQ=13.59), Apparel & Textiles (10.96), and Logging and Metal/Mineral Mining (7.95). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Furniture, Non-Profits, and Software/Info. Tech.

Declining clusters include Apparel & Textiles, which employs 600 workers, has an LQ of 10.96, and lost 53% of its employment base (600 jobs) in the last five years. Metalworking employs 2,300, LQ=13.59, and lost 14% (400 jobs). Consumer Goods Manufacturing employs 300, LQ=4.59, and lost 39% (200 jobs).

CHESTERFIELD COUNTY, SC

Industry Clusters: Chesterfield County, SC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CHESTERFIELD COUNTY, SC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	132	●	2.73		132	65	49.2%	0.2%
Agribusiness & Food	465	●	1.26	9.7%	41	(10)	-2.2%	1.9%
Apparel & Textiles	555	●	10.96	-53.4%	(637)	(445)	-80.2%	-20.1%
Automotive	33	○	0.33	13.8%	4	10	30.3%	-6.0%
Back Office	198	○	0.28	0.5%	1	36	18.2%	8.3%
Biomedical Supplies & Labs	188	●	1.83	27.9%	41	0	0.0%	8.0%
Building & Construction	917	●	1.18	-11.7%	(121)	167	18.2%	5.3%
Consumer Goods Mftg	290	●	4.59	-38.6%	(182)	(69)	-23.8%	-0.6%
Culture & Entertainment	979	●	0.72	-7.7%	(82)	2	0.2%	6.2%
Education	0	○	0.00	-100.0%	(5)	0		13.2%
Electronics	70	○	0.29	-32.0%	(33)	6	8.6%	1.3%
Energy	82	●	0.56	-1.2%	(1)	(1)	-1.2%	-1.5%
Engineering, Design, & Content	46	○	0.13	35.3%	12	(8)	-17.4%	2.0%
Finance	257	○	0.37	-17.1%	(53)	(15)	-5.8%	3.2%
Furniture	58	●	1.37	1060.0%	53	55	94.8%	-3.5%
Government	2,208	●	0.89	-4.8%	(111)	19	0.9%	4.0%
Healthcare	1,314	●	0.78	-0.3%	(4)	59	4.5%	11.8%
Industrial Machinery	110	○	0.38	-14.7%	(19)	(3)	-2.7%	-1.2%
Logging & Metal/Mineral Mining	151	●	7.95	-10.1%	(17)	2	1.3%	-2.2%
Materials	73	○	0.44	-53.8%	(85)	(12)	-16.4%	-7.2%
Metalworking	2,277	●	13.59	-14.2%	(376)	(223)	-9.8%	-5.1%
Non-Profits	69	●	0.52	35.3%	18	(1)	-1.4%	6.3%
Professional Services	117	○	0.26	15.8%	16	(7)	-6.0%	5.5%
Research	5	○	0.03	0.0%	0	0	0.0%	21.5%
Retail	1,601	●	0.95	12.6%	179	135	8.4%	3.3%
Shipbuilding	0	○	0.00		0	0		-6.0%
Software / Info. Tech.	10	○	0.04	100.0%	5	0	0.0%	16.5%
Telecom Services	66	●	0.79	17.9%	10	21	31.8%	-2.0%
Transportation & Logistics	1,148	●	2.75	0.1%	1	112	9.8%	4.6%
Total	13,323		1.00	-8.5%	(1,244)	(128)	-1.0%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

LANCASTER COUNTY, SC

Lancaster County's three **largest clusters** by employment size are Healthcare (2,600 employees), Retail (2,000), and Culture & Entertainment (1,100).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Research (2668% growth, 700 new jobs), Agribusiness & Food (201% growth, 150 new jobs), and Automotive (760% growth, 40 new jobs).

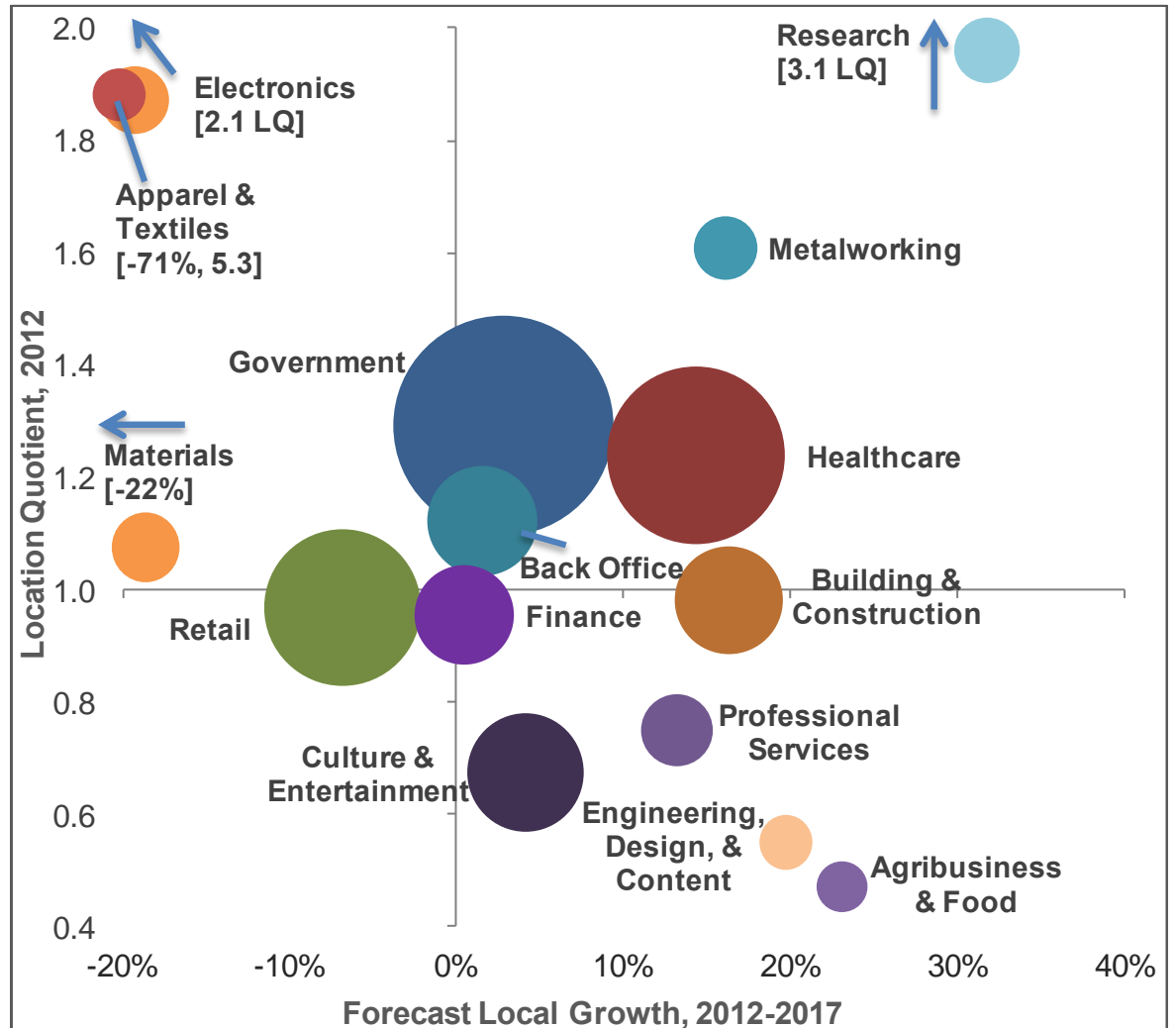
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Education (47% forecast growth), Furniture (45%), and Research (34%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=5.30), Research (3.07), and Electronics (2.10). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Biomedical Supplies & Labs, Agribusiness & Food, and Automotive.

Declining clusters include Apparel & Textiles, which employs 340 workers, has an LQ of 5.3, and lost 81% of its employment base (1,400 jobs) in the last five years. Building & Construction employs 1,000, LQ=0.98, and lost 33% (500 jobs). Finance employs 800, LQ=0.96, and lost 27% (300 jobs).

Industry Clusters: Lancaster County, SC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

LANCASTER COUNTY, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	0	○	0.00	0	0		0.2%	
Agribusiness & Food	217	○	0.47	201.4%	145	50	23.0%	1.9%
Apparel & Textiles	335	●	5.30	-80.5%	(1,381)	(239)	-71.3%	-20.1%
Automotive	43	○	0.34	760.0%	38	12	27.9%	-6.0%
Back Office	997	◐	1.12	32.8%	246	15	1.5%	8.3%
Biomedical Supplies & Labs	31	○	0.24	210.0%	21	9	29.0%	8.0%
Building & Construction	952	◑	0.98	-33.0%	(468)	155	16.3%	5.3%
Consumer Goods Mftg	131	◑	1.66	-15.5%	(24)	11	8.4%	-0.6%
Culture & Entertainment	1,142	◑	0.67	-8.3%	(103)	47	4.1%	6.2%
Education	15	○	0.05	-48.3%	(14)	7	46.7%	13.2%
Electronics	638	●	2.10	-11.4%	(82)	(118)	-18.5%	1.3%
Energy	126	◑	0.69	14.5%	16	(64)	-50.8%	-1.5%
Engineering, Design, & Content	234	◑	0.55	15.3%	31	46	19.7%	2.0%
Finance	819	◑	0.96	-27.0%	(303)	4	0.5%	3.2%
Furniture	40	◑	0.76	-38.5%	(25)	18	45.0%	-3.5%
Government	4,006	◑	1.29	3.3%	128	112	2.8%	4.0%
Healthcare	2,595	◑	1.24	39.5%	735	371	14.3%	11.8%
Industrial Machinery	185	◑	0.52	21.7%	33	(32)	-17.3%	-1.2%
Logging & Metal/Mineral Mining	28	◑	1.18	-41.7%	(20)	(13)	-46.4%	-2.2%
Materials	219	◑	1.05	102.8%	111	(48)	-21.9%	-7.2%
Metalworking	336	◑	1.61	2.4%	8	54	16.1%	-5.1%
Non-Profits	40	○	0.24	21.2%	7	12	30.0%	6.3%
Professional Services	426	◑	0.75	1.9%	8	56	13.1%	5.5%
Research	692	●	3.07	2668.0%	667	236	34.1%	21.5%
Retail	2,032	◑	0.97	-8.3%	(184)	(139)	-6.8%	3.3%
Shipbuilding	0	○	0.00		0	0		-6.0%
Software / Info. Tech.	96	○	0.34	174.3%	61	26	27.1%	16.5%
Telecom Services	88	◑	0.84	-40.5%	(60)	10	11.4%	-2.0%
Transportation & Logistics	216	○	0.41	-0.9%	(2)	(33)	-15.3%	4.6%
Total	16,621		1.00	-2.3%	(388)	524	3.2%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

UNION COUNTY, SC

Union County's three **largest clusters** by employment size are Retail (1,000 employees), Culture & Entertainment (600), and Apparel & Textiles (500).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Automotive (1200% growth, 100 new jobs), Retail (8% growth, 70 new jobs), and Healthcare (12% growth, 40 new jobs).

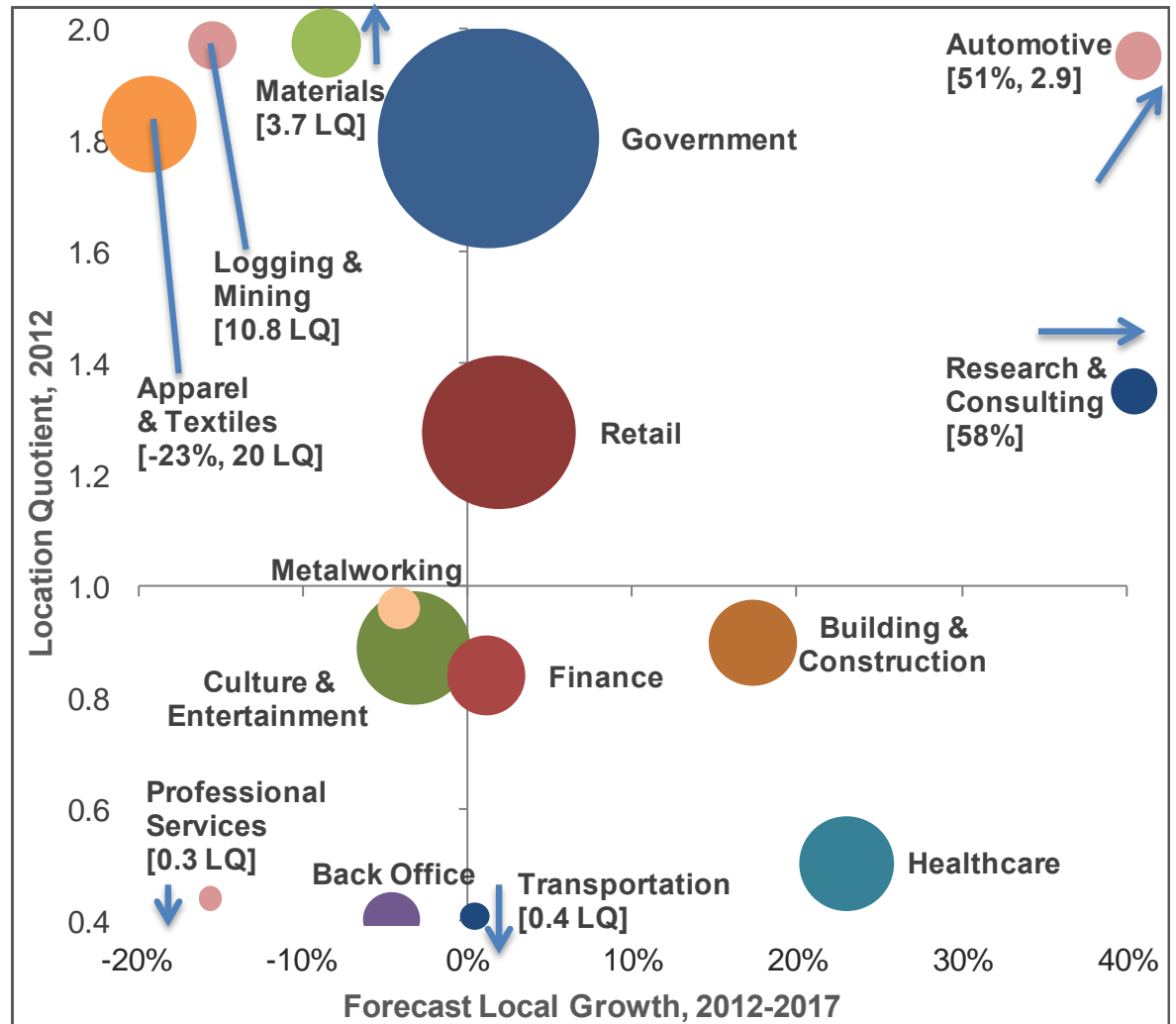
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (58% forecast growth), Automotive (51%), and Industrial Machinery (33%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=19.68), Logging & Metal/Mineral Mining (10.80), and Materials (3.73). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Industrial Machinery, Healthcare, and Non-Profits.

Declining clusters include Apparel & Textiles, which employs 500 workers, has an LQ of 19.68, and lost 65% of its employment base (800 jobs) in the last five years. Metalworking employs 70, LQ=0.96, and lost 81% (300 jobs). Professional Services employs 50, LQ=0.25, and lost 57% (70 jobs).

Industry Clusters: Union County, SC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

UNION COUNTY, SC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	0	○	0.00	0	0		0.2%
Agribusiness & Food	15	○	0.09	0	0	0.0%	1.9%
Apparel & Textiles	452	●	19.68	(824)	(103)	-22.8%	-20.1%
Automotive	130	●	2.85	120	66	50.8%	-6.0%
Back Office	130	○	0.40	(53)	(6)	-4.6%	8.3%
Biomedical Supplies & Labs	0	○	0.00	0	0		8.0%
Building & Construction	317	◐	0.90	(42)	55	17.4%	5.3%
Consumer Goods Mftg	5	○	0.17	5	0	0.0%	-0.6%
Culture & Entertainment	548	◐	0.89	(53)	(18)	-3.3%	6.2%
Education	15	○	0.13	(19)	0	0.0%	13.2%
Electronics	5	○	0.05	0	0	0.0%	1.3%
Energy	19	○	0.29	0	(14)	-73.7%	-1.5%
Engineering, Design, & Content	39	○	0.25	(20)	4	10.3%	2.0%
Finance	262	◐	0.84	(22)	3	1.1%	3.2%
Furniture	39	●	2.03	(14)	1	2.6%	-3.5%
Government	2,033	●	1.80	(110)	26	1.3%	4.0%
Healthcare	382	◐	0.50	42	88	23.0%	11.8%
Industrial Machinery	24	○	0.18	4	8	33.3%	-1.2%
Logging & Metal/Mineral Mining	93	●	10.80	(20)	(13)	-14.0%	-2.2%
Materials	283	●	3.73	1	(20)	-7.1%	-7.2%
Metalworking	73	◐	0.96	(303)	(3)	-4.1%	-5.1%
Non-Profits	49	◐	0.81	11	(4)	-8.2%	6.3%
Professional Services	51	○	0.25	(67)	(7)	-13.7%	5.5%
Research	110	●	1.34	(33)	64	58.2%	21.5%
Retail	975	●	1.28	71	19	1.9%	3.3%
Shipbuilding	0	○	0.00	0	0		-6.0%
Software / Info. Tech.	5	○	0.05	0	0	0.0%	16.5%
Telecom Services	13	○	0.34	(3)	3	23.1%	-2.0%
Transportation & Logistics	68	○	0.36	(7)	1	1.5%	4.6%
Total	6,043		1.00	(1,357)	132	2.2%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

YORK COUNTY, SC

York County's three **largest clusters** by employment size are Retail (11,100 employees), Culture & Entertainment (8,800), and Healthcare (8,000).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Retail (22%, 2,000 new jobs), Finance (20% growth, 1,100 new jobs), and Healthcare (12% growth, 800 new jobs).

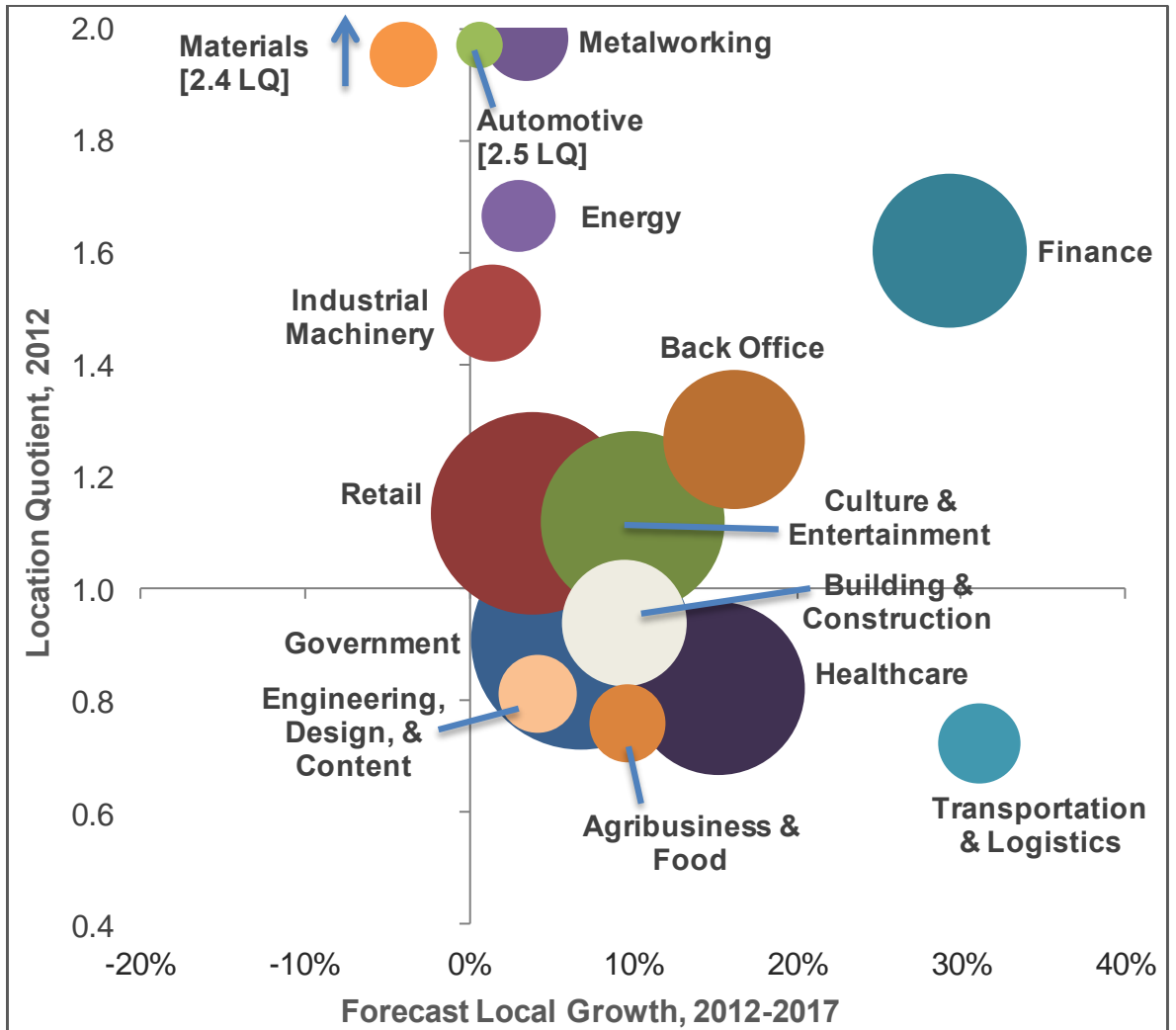
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Telecom Services (35% forecast growth), Research (34%), and Transportation and Logistics (31%).
[Note: Forecasts from EconomicModeling.com]

The county's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=3.59), Automotive (2.45), and Materials (2.43). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Research, Private Education, and Electronics.

Declining clusters include Building & Construction, which employs 4,200 workers, has an LQ of 0.94, and lost 32% of its employment base (2,000 jobs) in the last five years. Automotive employs 1,400, LQ=2.45, and lost 19% (300 jobs). Biomedical Supplies & Labs employs 400, LQ=0.66, and lost 41% (300 jobs).

Industry Clusters: York County, SC



Source: Avalanche Consulting using data from EMSI Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

YORK COUNTY, SC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	5	0.02		5	0	0.0%	0.2%
Agribusiness & Food	1,623	0.76	26.1%	336	157	9.7%	1.9%
Apparel & Textiles	1,054	3.59	-9.8%	(115)	(150)	-14.2%	-20.1%
Automotive	1,425	2.45	-18.8%	(330)	33	2.3%	-6.0%
Back Office	5,234	1.27	3.1%	157	848	16.2%	8.3%
Biomedical Supplies & Labs	390	0.66	-40.7%	(268)	16	4.1%	8.0%
Building & Construction	4,231	0.94	-31.7%	(1,960)	401	9.5%	5.3%
Consumer Goods Mftg	451	1.23	55.5%	161	(55)	-12.2%	-0.6%
Culture & Entertainment	8,820	1.12	1.3%	117	881	10.0%	6.2%
Education	268	0.18	22.4%	49	27	10.1%	13.2%
Electronics	1,053	0.75	36.6%	282	(107)	-10.2%	1.3%
Energy	1,417	1.66	6.7%	89	43	3.0%	-1.5%
Engineering, Design, & Content	1,608	0.81	-0.9%	(15)	67	4.2%	2.0%
Finance	6,384	1.60	19.7%	1,051	1,875	29.4%	3.2%
Furniture	115	0.47	-48.0%	(106)	14	12.2%	-3.5%
Government	13,067	0.91	7.4%	898	893	6.8%	4.0%
Healthcare	8,000	0.82	11.6%	832	1,218	15.2%	11.8%
Industrial Machinery	2,480	1.49	11.3%	251	35	1.4%	-1.2%
Logging & Metal/Mineral Mining	64	0.58	-56.2%	(82)	(10)	-15.6%	-2.2%
Materials	2,360	2.43	-8.1%	(209)	(79)	-3.3%	-7.2%
Metalworking	1,923	1.98	-1.0%	(19)	67	3.5%	-5.1%
Non-Profits	207	0.27	-9.6%	(22)	9	4.3%	6.3%
Professional Services	963	0.36	-5.5%	(56)	44	4.6%	5.5%
Research	266	0.25	31.0%	63	91	34.2%	21.5%
Retail	11,077	1.13	21.7%	1,978	426	3.8%	3.3%
Shipbuilding	0	0.00		0	0		-6.0%
Software / Info. Tech.	270	0.21	-0.4%	(1)	18	6.7%	16.5%
Telecom Services	770	1.59	-0.1%	(1)	270	35.1%	-2.0%
Transportation & Logistics	1,749	0.72	-4.8%	(88)	545	31.2%	4.6%
Total	77,222	1.00	3.9%	2,878	7,549	9.8%	5.2%

Source: Avalanche Consulting using data from EMSI

Private Sector Industry Clusters

CENTRALINA REGION

The Centralina Region's three **largest clusters** by employment size are Retail (110,400 employees), Culture & Entertainment (100,000), and Healthcare (81,800).

The region's three **fastest growing clusters of the past five years** (2007 to 2012) were Healthcare (13% growth, 9,300 new jobs), Culture & Entertainment (9%, 8,000 new jobs), and Research (26% growth, 2,700 new jobs).

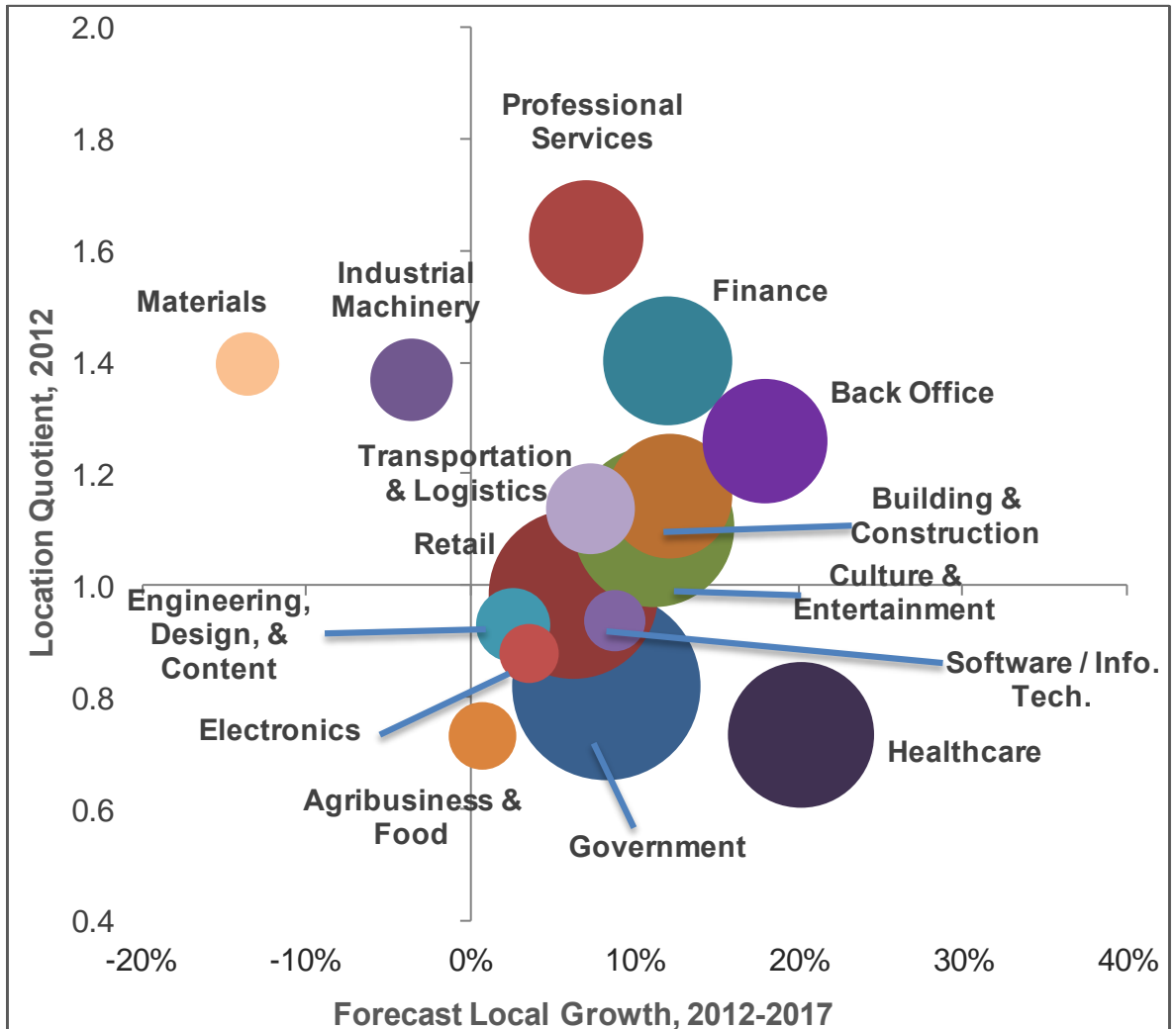
The three **fastest forecasted growth clusters** (2012 to 2017) for the region are: Research (36% forecast growth), Healthcare (20%), and Biomedical Supplies and Labs (19%). *[Note: Forecasts from EconomicModeling.com]*

The region's **clusters with the highest concentration** (highest Location Quotient) are Apparel & Textiles (LQ=2.41), Professional Services (1.63), and Automotive (1.48). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Aerospace, Private Education, and Software/Info. Tech.

Declining clusters include Building & Construction, which employs 60,100 workers, has an LQ of 1.16, and lost 33% of its employment base (29,100 jobs) in the last five years. Apparel & Textiles employs 8,100, LQ=2.41, and lost 41% (5,700 jobs). Retail employs 110,400, LQ=0.986, and lost 5% (5,300 jobs).

Industry Clusters: Centralina Region



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

CENTRALINA REGION

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth			
			Growth	New Jobs	New Jobs	Local %	US %	
Aerospace	325	○	0.10	22.6%	60	5	1.5%	0.2%
Agribusiness & Food	17,927	◐	0.73	-15.3%	(3,236)	128	0.7%	1.9%
Apparel & Textiles	8,106	●	2.41	-41.2%	(5,689)	(2,317)	-28.6%	-20.1%
Automotive	9,923	◐	1.48	-21.3%	(2,681)	509	5.1%	-6.0%
Back Office	59,751	◐	1.26	-1.6%	(976)	10,772	18.0%	8.3%
Biomedical Supplies & Labs	4,474	◐	0.66	16.6%	638	842	18.8%	8.0%
Building & Construction	60,082	◐	1.16	-32.6%	(29,084)	7,319	12.2%	5.3%
Consumer Goods Mftg	3,715	◐	0.88	-19.6%	(907)	27	0.7%	-0.6%
Culture & Entertainment	99,746	◐	1.10	8.7%	7,953	11,217	11.2%	6.2%
Education	13,485	◐	0.78	22.8%	2,508	1,740	12.9%	13.2%
Electronics	14,233	◐	0.88	-3.8%	(569)	512	3.6%	1.3%
Energy	4,499	○	0.46	-13.8%	(722)	(631)	-14.0%	-1.5%
Engineering, Design, & Content	21,044	◐	0.93	-17.3%	(4,417)	550	2.6%	2.0%
Finance	64,172	◐	1.40	-7.4%	(5,146)	7,738	12.1%	3.2%
Furniture	3,803	◐	1.35	-36.7%	(2,205)	(17)	-0.4%	-3.5%
Government	135,344	◐	0.82	5.6%	7,127	11,277	8.3%	4.0%
Healthcare	81,770	◐	0.73	12.8%	9,264	16,506	20.2%	11.8%
Industrial Machinery	26,110	◐	1.37	-8.9%	(2,562)	(946)	-3.6%	-1.2%
Logging & Metal/Mineral Mining	784	◐	0.62	-32.0%	(369)	(24)	-3.1%	-2.2%
Materials	15,544	◐	1.40	-16.7%	(3,108)	(2,107)	-13.6%	-7.2%
Metalworking	12,837	◐	1.15	-19.4%	(3,094)	(85)	-0.7%	-5.1%
Non-Profits	4,496	◐	0.51	-41.2%	(3,144)	455	10.1%	6.3%
Professional Services	49,394	◐	1.63	6.3%	2,913	3,501	7.1%	5.5%
Research	13,274	◐	1.10	25.6%	2,703	4,706	35.5%	21.5%
Retail	110,354	◐	0.98	-4.6%	(5,303)	6,912	6.3%	3.3%
Shipbuilding	5	○	0.01	0.0%	0	0	0.0%	-6.0%
Software / Info. Tech.	14,075	◐	0.94	7.5%	984	1,237	8.8%	16.5%
Telecom Services	5,857	◐	1.05	-1.3%	(78)	(248)	-4.2%	-2.0%
Transportation & Logistics	31,585	◐	1.14	-11.9%	(4,286)	2,318	7.3%	4.6%
Total	886,699		1.00	-5.1%	(47,463)	81,885	9.2%	5.2%

Source: Avalanche Consulting using data from EMSI

Appendix B.2:

County Detailed Industry Cluster Trends

Alexander County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	39	1.2	95.0%	19	5	12.8%	14.4%
Agribusiness & Food	1120	Animal Production	38	2.7	-41.5%	(27)	(6)	-15.8%	1.9%
Agribusiness & Food	3116	Animal Slaughtering and Processing	76	2.5	11.8%	8	36	47.4%	-6.4%
Agribusiness & Food	4244	Grocery and Related Product Merchant Wholesalers	51	1.1	-17.7%	(11)	6	11.8%	0.7%
Apparel & Textiles	3132	Fabric Mills	166	56.3	-29.4%	(69)	(161)	-97.0%	4.3%
Apparel & Textiles	3141	Textile Furnishings Mills	10	3.3	100.0%	5	(5)	-50.0%	15.1%
Apparel & Textiles	3149	Other Textile Product Mills	70	19.4	1300.0%	65	26	37.1%	8.5%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	22	3.2	-29.0%	(9)	57	259.1%	2.3%
Apparel & Textiles	4243	Apparel, Piece, & Notions Merchant Wholesalers	14	1.6	180.0%	9	(9)	-64.3%	-2.0%
Back Office	5613	Employment Services	118	0.7	-45.4%	(98)	10	8.5%	-4.3%
Back Office	5617	Services to Buildings and Dwellings	53	0.5	10.4%	5	20	37.7%	4.7%
Back Office	5619	Other Support Services	22	1.3	46.7%	7	11	50.0%	-1.5%
Building & Construction	2361	Residential Building Construction	36	1.0	-37.9%	(22)	(3)	-8.3%	8.7%
Building & Construction	2371	Utility System Construction	12	0.5	-7.7%	(1)	(1)	-8.3%	14.0%
Building & Construction	2381	Foundation, Structure, & Bldg. Exterior Contractors	43	1.0	-8.5%	(4)	15	34.9%	4.6%
Building & Construction	2382	Building Equipment Contractors	81	0.8	-14.7%	(14)	9	11.1%	-2.5%
Building & Construction	2383	Building Finishing Contractors	14	0.4	-36.4%	(8)	0	0.0%	3.8%
Building & Construction	2389	Other Specialty Trade Contractors	18	0.5	-45.5%	(15)	(8)	-44.4%	1.2%
Building & Construction	3211	Sawmills and Wood Preservation	31	6.4	34.8%	8	(6)	-19.4%	3.1%
Building & Construction	3219	Other Wood Product Manufacturing	73	6.5	-28.4%	(29)	(17)	-23.3%	8.5%
Building & Construction	4441	Building Material and Supplies Dealers	58	0.9	-29.3%	(24)	(6)	-10.3%	-4.9%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	10	0.5	-58.3%	(14)	(5)	-50.0%	1.0%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	21	1.8	0.0%	0	9	42.9%	-3.0%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	32	0.5	-36.0%	(18)	13	40.6%	4.7%
Culture & Entertainment	7221	Full-Service Restaurants	162	0.6	-50.6%	(166)	(38)	-23.5%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	295	1.1	2.8%	8	63	21.4%	-0.4%
Education	6111	Elementary and Secondary Schools (Private)	47	1.1	840.0%	42	12	25.5%	-6.4%
Education	6117	Educational Support Services (Private)	25	3.3	400.0%	20	11	44.0%	-26.4%
Electronics	3345	Nav., Measuring, Electromedical, & Control Inst. Mfg.	52	2.1	205.9%	35	(8)	-15.4%	-5.3%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	14	0.3	-12.5%	(2)	2	14.3%	23.6%
Energy	2212	Natural Gas Distribution	18	2.7	50.0%	6	9	50.0%	-33.6%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	14	0.2	-30.0%	(6)	0	0.0%	1.4%

Alexander County, NC

















Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5221	Depository Credit Intermediation	87	0.8	-1.1%	(1)	5	5.7%	4.8%
Finance	5222	Nondepository Credit Intermediation	50	1.5	138.1%	29	21	42.0%	-34.2%
Finance	5242	Agencies, Brokerages, & Other Ins. Related Activities	44	0.8	18.9%	7	16	36.4%	6.0%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	1,602	124.6	-47.5%	(1,449)	(640)	-40.0%	-2.2%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	128	22.3	-46.4%	(111)	(88)	-68.8%	15.6%
Furniture	3379	Other Furniture Related Product Manufacturing	23	10.6		23	24	104.3%	-1.2%
Government	9011	Federal Government, Civilian	60	0.3	13.2%	7	(1)	-1.7%	12.4%
Government	9012	Federal Government, Military	90	0.7	-3.2%	(3)	0	0.0%	19.5%
Government	9029	State Government, Excluding Education & Hospitals	569	3.9	9.2%	48	0	0.0%	17.6%
Government	9036	Education and Hospitals (Local Government)	868	1.6	-6.2%	(57)	82	9.4%	3.4%
Government	9039	Local Government, Excluding Education & Hospitals	409	1.2	6.0%	23	40	9.8%	7.6%
Healthcare	6211	Offices of Physicians	32	0.2	-45.8%	(27)	(6)	-18.8%	7.2%
Healthcare	6212	Offices of Dentists	34	0.6	6.3%	2	4	11.8%	8.0%
Healthcare	6213	Offices of Other Health Practitioners	14	0.3	-33.3%	(7)	4	28.6%	4.9%
Healthcare	6216	Home Health Care Services	62	0.8	-18.4%	(14)	(4)	-6.5%	19.8%
Healthcare	6231	Nursing Care Facilities	163	1.5	-15.1%	(29)	5	3.1%	0.8%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	62	1.7	-21.5%	(17)	16	25.8%	-10.3%
Healthcare	6233	Community Care Facilities for the Elderly	81	1.6	2.5%	2	3	3.7%	4.8%
Healthcare	6241	Individual and Family Services	11	0.1	-31.3%	(5)	7	63.6%	6.4%
Healthcare	6244	Child Day Care Services	45	0.9	-51.1%	(47)	(5)	-11.1%	-10.3%
Logging & Metal/Mineral Mi	2122	Metal Ore Mining	92	40.2	1740.0%	87	(3)	-3.3%	10.7%
Materials	3222	Converted Paper Product Manufacturing	143	8.4	-31.9%	(67)	(53)	-37.1%	6.6%
Materials	3261	Plastics Product Manufacturing	250	8.2	64.5%	98	54	21.6%	7.7%
Metalworking	3323	Architectural and Structural Metals Manufacturing	10	0.5	-77.3%	(34)	(5)	-50.0%	4.0%
Metalworking	3324	Boiler, Tank, and Shipping Container Manufacturing	28	5.2	100.0%	14	(7)	-25.0%	28.1%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	123	8.0	5.1%	6	49	39.8%	6.0%
Professional Services	5411	Legal Services	14	0.2	-22.2%	(4)	(9)	-64.3%	2.3%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	69	1.2	38.0%	19	13	18.8%	9.3%
Professional Services	5419	Other Professional, Scientific, and Technical Services	49	1.3	-32.9%	(24)	(6)	-12.2%	-5.4%
Professional Services	5511	Management of Companies and Enterprises	43	0.4	2.4%	1	4	9.3%	-6.3%
Research	5416	Management, Scientific, & Technical Consulting Svcs.	212	2.9	37.7%	58	85	40.1%	9.8%
Retail	4411	Automobile Dealers	11	0.2	-74.4%	(32)	(1)	-9.1%	0.1%

Alexander County, NC Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4413	Automotive Parts, Accessories, and Tire Stores	 44	 1.4	2.3%	1	3	6.8%	-5.8%
Retail	4451	Grocery Stores	 65	 0.4	-28.6%	(26)	(38)	-58.5%	-2.3%
Retail	4461	Health and Personal Care Stores	 79	 1.3	9.7%	7	16	20.3%	1.3%
Retail	4471	Gasoline Stations	 63	 1.2	6.8%	4	(1)	-1.6%	11.6%
Retail	4529	Other General Merchandise Stores	 286	 2.9	1.4%	4	34	11.9%	-0.4%
Retail	8111	Automotive Repair and Maintenance	 73	 1.4	7.4%	5	0	0.0%	9.0%
Retail	8114	Personal & Household Goods Repair & Maintenance	 19	 4.7	280.0%	14	3	15.8%	6.5%
Retail	8122	Death Care Services	 27	 3.3	28.6%	6	4	14.8%	6.5%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	 11	 0.7	120.0%	6	4	36.4%	6.4%
Transportation & Logistics	4841	General Freight Trucking	 126	 2.3	0.8%	1	17	13.5%	13.4%
Total	10	Total	8,338		-19.5%	(2,014)	(307)	-3.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Anson County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	52	● 1.7	300.0%	39	18	34.6%	-1.2%
Agribusiness & Food	1120	Animal Production	35	● 2.7	-70.3%	(83)	(30)	-85.7%	-1.5%
Agribusiness & Food	1152	Support Activities for Animal Production	14	● 8.9	180.0%	9	0	0.0%	10.0%
Agribusiness & Food	3116	Animal Slaughtering and Processing	170	● 6.2	61.9%	65	2	1.2%	2.3%
Agribusiness & Food	4244	Grocery and Related Product Merchant Wholesalers	84	● 2.0	52.7%	29	47	56.0%	6.4%
Apparel & Textiles	3132	Fabric Mills	312	● 115.9	-32.8%	(152)	(307)	-98.4%	-34.2%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	25	● 4.0	-39.0%	(16)	(20)	-80.0%	-33.6%
Back Office	5611	Office Administrative Services	22	◐ 0.9	-26.7%	(8)	18	81.8%	12.4%
Back Office	5613	Employment Services	128	◐ 0.8	85.5%	59	112	87.5%	6.0%
Back Office	5616	Investigation and Security Services	36	◐ 0.8	-54.4%	(43)	18	50.0%	9.9%
Back Office	5617	Services to Buildings and Dwellings	45	○ 0.4	0.0%	0	4	8.9%	9.8%
Building & Construction	2362	Nonresidential Building Construction	12	○ 0.3	140.0%	7	(7)	-58.3%	6.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Exterior Contractors	45	◐ 1.2	4.7%	2	25	55.6%	4.7%
Building & Construction	2382	Building Equipment Contractors	84	◐ 0.9	5.0%	4	9	10.7%	8.5%
Building & Construction	2383	Building Finishing Contractors	33	◐ 0.9	3.1%	1	1	3.0%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	54	● 1.8	25.6%	11	25	46.3%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	13	● 2.9	-65.8%	(25)	(8)	-61.5%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	86	● 8.4	50.9%	29	96	111.6%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	81	● 37.7	-14.7%	(14)	(11)	-13.6%	-7.3%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	33	● 8.9	-58.8%	(47)	(12)	-36.4%	1.0%
Building & Construction	4441	Building Material and Supplies Dealers	23	○ 0.4	27.8%	5	13	56.5%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	30	● 4.1	-9.1%	(3)	5	16.7%	0.6%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	12	○ 0.2	-40.0%	(8)	1	8.3%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	10	○ 0.1	100.0%	5	0	0.0%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	114	○ 0.4	23.9%	22	(1)	-0.9%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	293	◐ 1.2	0.3%	1	(3)	-1.0%	6.5%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	40	◐ 0.8	48.1%	13	15	37.5%	14.4%
Energy	2211	Electric Power Gen., Transmission & Distribution	34	◐ 1.5	-34.6%	(18)	(29)	-85.3%	-3.7%
Energy	4235	Metal & Mineral Merchant Wholesalers	24	● 3.6	-4.0%	(1)	4	16.7%	-0.5%
Engineering, Design, & Cont	5413	Architectural, Engineering, and Related Services	21	○ 0.3	-41.7%	(15)	(4)	-19.0%	8.0%
Finance	5221	Depository Credit Intermediation	48	○ 0.5	-36.0%	(27)	(6)	-12.5%	3.4%
Finance	5242	Agencies, Brokerages, & Other Ins. Related Activities	21	○ 0.4	-22.2%	(6)	2	9.5%	7.6%

Anson County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5312	Offices of Real Estate Agents and Brokers	11	0.7	120.0%	6	5	45.5%	5.2%
Furniture	4232	Furniture & Home Furnishing Merchant Wholesalers	153	29.0	45.7%	48	5	3.3%	1.6%
Government	5621	Waste Collection	72	8.6	80.0%	32	23	31.9%	8.7%
Government	9011	Federal Government, Civilian	59	0.3	7.3%	4	0	0.0%	1.4%
Government	9012	Federal Government, Military	60	0.5	-7.7%	(5)	0	0.0%	0.8%
Government	9026	Education and Hospitals (State Government)	588	3.6	109.3%	307	(2)	-0.3%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	547	4.1	-38.1%	(337)	(12)	-2.2%	3.8%
Government	9036	Education and Hospitals (Local Government)	858	1.7	-19.8%	(212)	34	4.0%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	549	1.7	12.3%	60	31	5.6%	4.8%
Healthcare	6211	Offices of Physicians	88	0.6	12.8%	10	12	13.6%	14.0%
Healthcare	6212	Offices of Dentists	17	0.3	240.0%	12	(1)	-5.9%	11.6%
Healthcare	6214	Outpatient Care Centers	25	0.7	-45.7%	(21)	1	4.0%	15.1%
Healthcare	6216	Home Health Care Services	65	1.0	-48.4%	(61)	(38)	-58.5%	19.8%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	136	4.0	2620.0%	131	93	68.4%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	73	1.6		73	41	56.2%	12.4%
Healthcare	6241	Individual and Family Services	51	0.7	-66.9%	(103)	5	9.8%	19.5%
Healthcare	6243	Vocational Rehabilitation Services	10	0.5	-86.8%	(66)	(5)	-50.0%	10.1%
Healthcare	6244	Child Day Care Services	98	2.2	1860.0%	93	34	34.7%	8.7%
Industrial Machinery	3353	Electrical Equipment Manufacturing	135	18.1	75.3%	58	36	26.7%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	36	1.0	-81.5%	(159)	(1)	-2.8%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Merchant Wholesalers	18	0.5	260.0%	13	5	27.8%	2.1%
Industrial Machinery	4239	Miscellaneous Durable Goods Merchant Wholesalers	26	1.6	116.7%	14	7	26.9%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	54	5.3	-11.5%	(7)	15	27.8%	3.3%
Logging & Metal/Mineral Mi	1133	Logging	50	19.0	-39.8%	(33)	(6)	-12.0%	-4.2%
Logging & Metal/Mineral Mi	1153	Support Activities for Forestry	19	24.3	26.7%	4	(3)	-15.8%	-0.1%
Materials	3252	Resin, Synth. Rubber, & Synth. Fiber & Filaments Mfg.	99	20.1	7.6%	7	(74)	-74.7%	-6.9%
Materials	3261	Plastics Product Manufacturing	13	0.5	160.0%	8	12	92.3%	-4.9%
Metalworking	3322	Cutlery and Handtool Manufacturing	210	98.0	4100.0%	205	122	58.1%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	177	9.6	-34.2%	(92)	26	14.7%	1.9%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	62	4.4	26.5%	13	1	1.6%	-5.4%
Professional Services	5411	Legal Services	41	0.6	41.4%	12	11	26.8%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	17	0.3	0.0%	0	0	0.0%	7.2%

Anson County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Professional Services	5511	Management of Companies and Enterprises	56	☐ 0.5	93.1%	27	(10)	-17.9%	3.1%
Retail	4411	Automobile Dealers	26	○ 0.4	-16.1%	(5)	3	11.5%	-2.0%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	36	◐ 1.3	50.0%	12	2	5.6%	1.0%
Retail	4421	Furniture Stores	14	◑ 1.2	-6.7%	(1)	0	0.0%	1.6%
Retail	4451	Grocery Stores	153	◒ 1.1	-42.5%	(113)	(4)	-2.6%	2.3%
Retail	4461	Health and Personal Care Stores	31	◓ 0.5	0.0%	0	(1)	-3.2%	6.6%
Retail	4471	Gasoline Stations	97	● 2.1	-6.7%	(7)	6	6.2%	-2.3%
Retail	4529	Other General Merchandise Stores	269	● 3.0	3.1%	8	57	21.2%	15.1%
Retail	4543	Direct Selling Establishments	25	● 3.4	-16.7%	(5)	0	0.0%	-6.7%
Retail	5322	Consumer Goods Rental	11	◐ 1.1	-31.3%	(5)	(6)	-54.5%	-1.0%
Retail	8111	Automotive Repair and Maintenance	28	◑ 0.6	3.7%	1	6	21.4%	4.0%
Retail	8122	Death Care Services	20	● 2.7	53.8%	7	6	30.0%	1.2%
Transportation & Logistics	4821	Rail Transportation	14	◐ 1.1	-6.7%	(1)	(1)	-7.1%	0.3%
Transportation & Logistics	4841	General Freight Trucking	126	● 2.5	-19.7%	(31)	(7)	-5.6%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	50	● 2.2	-23.1%	(15)	8	16.0%	4.9%
Total	10	Total	7,612	◐ 1.0	-7.8%	(648)	425	5.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	63	○ 0.3	-12.5%	(9)	7	11.1%	-1.2%
Agribusiness & Food	1142	Hunting and Trapping	17	● 22.5	240.0%	12	(6)	-35.3%	-8.6%
Agribusiness & Food	3111	Animal Food Manufacturing	33	● 1.4	153.8%	20	5	15.2%	-1.6%
Agribusiness & Food	3113	Sugar & Confectionery Product Mfg.	50	● 1.6		50	8	16.0%	-4.3%
Agribusiness & Food	3116	Animal Slaughtering and Processing	349	● 1.5	-32.5%	(168)	19	5.4%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	105	◐ 0.8	28.0%	23	5	4.8%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	543	● 7.0	5.0%	26	29	5.3%	3.8%
Agribusiness & Food	3122	Tobacco Manufacturing	437	● 65.0	-82.5%	(2,062)	(298)	-68.2%	-13.4%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	664	● 1.9	-8.2%	(59)	146	22.0%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	33	○ 0.4	175.0%	21	23	69.7%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	54	● 4.7	145.5%	32	(43)	-79.6%	-26.5%
Apparel & Textiles	3132	Fabric Mills	52	● 2.3	-44.7%	(42)	(47)	-90.4%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	12	◐ 0.8	-69.2%	(27)	(7)	-58.3%	-33.5%
Apparel & Textiles	3149	Other Textile Product Mills	53	● 2.0	-70.1%	(124)	8	15.1%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	129	● 20.6	-63.9%	(228)	(119)	-92.2%	-52.1%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	102	● 1.6	-5.6%	(6)	(34)	-33.3%	-3.0%
Automotive	3363	Motor Vehicle Parts Manufacturing	334	● 1.8	8.4%	26	184	55.1%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	79	● 4.9	-60.9%	(123)	28	35.4%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	123	◐ 0.8	-16.9%	(25)	(19)	-15.4%	0.3%
Back Office	5611	Office Administrative Services	118	◐ 0.6	-49.1%	(114)	52	44.1%	12.4%
Back Office	5613	Employment Services	789	◐ 0.6	-46.5%	(687)	36	4.6%	6.0%
Back Office	5614	Business Support Services	1,242	● 3.2	76.7%	539	546	44.0%	9.4%
Back Office	5616	Investigation and Security Services	128	○ 0.3	9.4%	11	41	32.0%	9.9%
Back Office	5617	Services to Buildings and Dwellings	894	● 1.1	17.9%	136	179	20.0%	9.8%
Back Office	5619	Other Support Services	142	● 1.1	11.8%	15	(58)	-40.8%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	11	○ 0.1	-56.0%	(14)	4	36.4%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	56	○ 0.4	-3.4%	(2)	11	19.6%	3.8%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	33	○ 0.3	-13.2%	(5)	17	51.5%	16.3%
Building & Construction	2361	Residential Building Construction	282	● 1.1	-39.1%	(181)	7	2.5%	6.4%
Building & Construction	2362	Nonresidential Building Construction	57	○ 0.2	-50.9%	(59)	(41)	-71.9%	6.1%
Building & Construction	2371	Utility System Construction	71	○ 0.4	-76.2%	(227)	(38)	-53.5%	4.6%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2372	Land Subdivision	14	0.6	-76.3%	(45)	(3)	-21.4%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	29	0.2	-85.6%	(173)	(24)	-82.8%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	18	0.4	-62.5%	(30)	(8)	-44.4%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	704	2.2	-45.7%	(592)	199	28.3%	4.7%
Building & Construction	2382	Building Equipment Contractors	917	1.2	-23.3%	(279)	105	11.5%	8.5%
Building & Construction	2383	Building Finishing Contractors	544	1.9	-18.3%	(122)	188	34.6%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	448	1.8	-38.7%	(283)	(49)	-10.9%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	27	0.7	3.8%	1	8	29.6%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	51	0.6	37.8%	14	32	62.7%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	35	2.0	600.0%	30	(22)	-62.9%	-7.3%
Building & Construction	3272	Glass and Glass Product Manufacturing	185	5.3	873.7%	166	11	5.9%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	110	1.4	-56.9%	(145)	26	23.6%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	34	1.1	-22.7%	(10)	1	2.9%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	326	3.7	-17.9%	(71)	41	12.6%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	336	3.2	13.1%	39	133	39.6%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	536	1.1	-19.3%	(128)	54	10.1%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	75	1.2	212.5%	51	35	46.7%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	182	1.5	-30.5%	(80)	(89)	-48.9%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	219	1.4	-47.7%	(200)	(32)	-14.6%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	17	0.2	-59.5%	(25)	1	5.9%	1.3%
Culture & Entertainment	7112	Spectator Sports	1,508	25.6	-18.0%	(332)	273	18.1%	7.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	106	2.3	360.9%	83	71	67.0%	9.5%
Culture & Entertainment	7131	Amusement Parks and Arcades	508	6.2	446.2%	415	159	31.3%	3.5%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	224	0.4	-31.5%	(103)	(22)	-9.8%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	538	0.7	-7.7%	(45)	82	15.2%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	3,415	1.6	0.9%	32	221	6.5%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	3,356	1.7	24.4%	658	406	12.1%	6.5%
Culture & Entertainment	7223	Special Food Services	402	1.5	1.0%	4	57	14.2%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	113	0.7	46.8%	36	31	27.4%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	310	0.9	12.7%	35	79	25.5%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	17	0.0	240.0%	12	(12)	-70.6%	11.7%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Education	6114	Bus. Schools & Comp. & Mgmt. Training (Private)	16	○ 0.4	220.0%	11	9	56.3%	3.0%
Education	6116	Other Schools and Instruction (Private)	330	● 2.1	3.1%	10	85	25.8%	16.8%
Education	6117	Educational Support Services (Private)	16	○ 0.3	-23.8%	(5)	6	37.5%	23.6%
Electronics	3359	Other Electrical Equipment & Component Mfg.	235	● 4.2	-49.7%	(232)	(30)	-12.8%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	159	● 1.1	29.3%	36	35	22.0%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	185	○ 0.5	-12.3%	(26)	(11)	-5.9%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	14	○ 0.3	180.0%	9	2	14.3%	2.8%
Energy	2212	Natural Gas Distribution	12	○ 0.2	140.0%	7	(7)	-58.3%	0.7%
Energy	3241	Petroleum and Coal Products Manufacturing	22	○ 0.4	-66.2%	(43)	(17)	-77.3%	-4.5%
Energy	4235	Metal and Mineral Wholesalers	42	◐ 0.8	7.7%	3	5	11.9%	-0.5%
Energy	4247	Petroleum & Petroleum Products Wholesalers	23	◑ 0.5	27.8%	5	3	13.0%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	101	○ 0.5	-27.3%	(38)	38	37.6%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	41	○ 0.2	-84.1%	(217)	(19)	-46.3%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	147	● 0.9	79.3%	65	34	23.1%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	72	◑ 0.7	1340.0%	67	10	13.9%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	44	● 1.2	76.0%	19	9	20.5%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	241	○ 0.4	-19.1%	(57)	14	5.8%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	36	◑ 0.6	-21.7%	(10)	7	19.4%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	60	○ 0.3	-28.6%	(24)	8	13.3%	3.0%
Finance	5221	Depository Credit Intermediation	439	◑ 0.5	-1.8%	(8)	32	7.3%	3.4%
Finance	5222	Nondepository Credit Intermediation	80	○ 0.3	-31.6%	(37)	(2)	-2.5%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	17	○ 0.1	-34.6%	(9)	(2)	-11.8%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	30	○ 0.1	0.0%	0	10	33.3%	3.1%
Finance	5239	Other Financial Investment Activities	17	○ 0.1	-26.1%	(6)	2	11.8%	6.8%
Finance	5241	Insurance Carriers	54	○ 0.1	-3.6%	(2)	6	11.1%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	244	◑ 0.6	8.9%	20	27	11.1%	7.6%
Finance	5311	Lessors of Real Estate	349	● 1.3	44.8%	108	63	18.1%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	91	◑ 0.7	-52.8%	(102)	11	12.1%	5.2%
Finance	5313	Activities Related to Real Estate	96	○ 0.4	-3.0%	(3)	(2)	-2.1%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	68	◑ 0.7	-39.8%	(45)	0	0.0%	-4.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	17	○ 0.4	54.5%	6	(5)	-29.4%	1.6%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Government	5621	Waste Collection	248	● 3.6	73.4%	105	40	16.1%	8.7%
Government	5622	Waste Treatment and Disposal	24	◐ 0.5		24	30	125.0%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	10	○ 0.2	-67.7%	(21)	(5)	-50.0%	8.6%
Government	9011	Federal Government, Civilian	316	○ 0.2	9.7%	28	19	6.0%	1.4%
Government	9012	Federal Government, Military	402	○ 0.4	-4.1%	(17)	2	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	247	○ 0.2	3.8%	9	11	4.5%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	644	◐ 0.6	34.4%	165	37	5.7%	3.8%
Government	9036	Education and Hospitals (Local Government)	8,240	● 2.0	2.1%	170	990	12.0%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	3,905	● 1.5	25.2%	786	549	14.1%	4.8%
Healthcare	6211	Offices of Physicians	652	◐ 0.6	-40.3%	(441)	(11)	-1.7%	14.0%
Healthcare	6212	Offices of Dentists	347	● 0.9	25.7%	71	106	30.5%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	201	◐ 0.6	13.6%	24	51	25.4%	17.6%
Healthcare	6214	Outpatient Care Centers	710	● 2.3	47.0%	227	258	36.3%	15.1%
Healthcare	6216	Home Health Care Services	287	◐ 0.5	41.4%	84	29	10.1%	19.8%
Healthcare	6231	Nursing Care Facilities	817	● 1.0	-13.2%	(124)	119	14.6%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	240	● 0.9	-5.5%	(14)	13	5.4%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	625	● 1.7	5.6%	33	160	25.6%	12.4%
Healthcare	6239	Other Residential Care Facilities	63	◐ 0.8	-63.8%	(111)	(17)	-27.0%	8.8%
Healthcare	6241	Individual and Family Services	534	● 0.9	65.3%	211	234	43.8%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	30	○ 0.4	-60.5%	(46)	(1)	-3.3%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	11	○ 0.1	120.0%	6	(6)	-54.5%	10.1%
Healthcare	6244	Child Day Care Services	476	● 1.3	0.2%	1	111	23.3%	8.7%
Industrial Machinery	3332	Industrial Machinery Manufacturing	27	◐ 0.6	440.0%	22	(22)	-81.5%	-13.2%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	172	● 3.9	45.8%	54	18	10.5%	-2.9%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	107	○ 0.4	33.8%	27	7	6.5%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	256	● 0.9	12.8%	29	17	6.6%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	86	◐ 0.6	-20.4%	(22)	3	3.5%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	50	◐ 0.6	-18.0%	(11)	(33)	-66.0%	3.3%
Logging & Metal/Mineral Mi	1133	Logging	17	◐ 0.8	-32.0%	(8)	0	0.0%	-4.2%
Logging & Metal/Mineral Mi	2123	Nonmetallic Mineral Mining and Quarrying	35	● 0.9	-63.2%	(60)	(4)	-11.4%	-2.9%
Materials	3222	Converted Paper Product Manufacturing	20	○ 0.2	-74.7%	(59)	(15)	-75.0%	-10.3%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Materials	3251	Basic Chemical Manufacturing	86	● 1.3	-26.5%	(31)	(32)	-37.2%	-11.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	69	● 1.5	0.0%	0	15	21.7%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	171	● 4.5	52.7%	59	(39)	-22.8%	-7.6%
Materials	3261	Plastics Product Manufacturing	304	● 1.3	-33.8%	(155)	(123)	-40.5%	-4.9%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	40	◐ 0.7	-37.5%	(24)	(7)	-17.5%	-2.6%
Metalworking	3322	Cutlery and Handtool Manufacturing	61	● 3.4	1120.0%	56	39	63.9%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	12	○ 0.1	-90.2%	(110)	(7)	-58.3%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	59	● 1.5	-65.7%	(113)	10	16.9%	-5.3%
Metalworking	3325	Hardware Manufacturing	25	● 2.4	25.0%	5	20	80.0%	-12.1%
Metalworking	3326	Spring and Wire Product Manufacturing	69	● 3.7	16.9%	10	(10)	-14.5%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	105	◐ 0.7	-34.0%	(54)	(17)	-16.2%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	45	◐ 0.8	181.3%	29	0	0.0%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	52	○ 0.4	10.6%	5	13	25.0%	-5.4%
Non-Profits	8131	Religious Organizations	28	○ 0.3	0.0%	0	15	53.6%	5.6%
Non-Profits	8132	Grantmaking and Giving Services	28	○ 0.5	64.7%	11	15	53.6%	6.9%
Non-Profits	8133	Social Advocacy Organizations	22	○ 0.2	69.2%	9	10	45.5%	7.4%
Non-Profits	8134	Civic and Social Organizations	381	● 2.0	2.4%	9	107	28.1%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	47	○ 0.2	-28.8%	(19)	14	29.8%	6.6%
Professional Services	5411	Legal Services	207	○ 0.4	-0.5%	(1)	27	13.0%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	202	○ 0.5	18.8%	32	18	8.9%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	324	● 1.1	11.3%	33	36	11.1%	8.5%
Professional Services	5511	Management of Companies and Enterprises	1,128	● 1.3	-6.1%	(73)	132	11.7%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	866	● 1.6	10.2%	80	329	38.0%	28.1%
Research	5417	Scientific Research and Development Services	53	○ 0.2	960.0%	48	13	24.5%	9.8%
Retail	4411	Automobile Dealers	746	● 1.5	-13.8%	(119)	116	15.5%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	220	● 3.6	-19.1%	(52)	50	22.7%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	480	● 2.0	18.8%	76	112	23.3%	1.0%
Retail	4421	Furniture Stores	45	○ 0.5	-60.2%	(68)	(29)	-64.4%	1.6%
Retail	4422	Home Furnishings Stores	114	● 1.1	-48.4%	(107)	(10)	-8.8%	2.6%
Retail	4431	Electronics and Appliance Stores	309	● 1.4	20.7%	53	60	19.4%	2.9%
Retail	4451	Grocery Stores	1,097	● 0.9	7.9%	80	33	3.0%	2.3%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4452	Specialty Food Stores	51	0.5	-54.5%	(61)	(8)	-15.7%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	19	0.3	-69.8%	(44)	(14)	-73.7%	1.7%
Retail	4461	Health and Personal Care Stores	609	1.3	-3.2%	(20)	36	5.9%	6.6%
Retail	4471	Gasoline Stations	490	1.3	0.8%	4	(13)	-2.7%	-2.3%
Retail	4481	Clothing Stores	1,620	3.1	11.4%	166	399	24.6%	3.6%
Retail	4482	Shoe Stores	280	3.0	-11.4%	(36)	25	8.9%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	149	2.3	-15.8%	(28)	12	8.1%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	634	2.9	14.0%	78	119	18.8%	4.9%
Retail	4512	Book, Periodical, and Music Stores	105	1.8	8.2%	8	(24)	-22.9%	-10.2%
Retail	4521	Department Stores	383	0.5	-8.4%	(35)	(184)	-48.0%	-3.3%
Retail	4529	Other General Merchandise Stores	2,135	2.9	21.9%	384	639	29.9%	15.1%
Retail	4531	Florists	25	0.8	-30.6%	(11)	(10)	-40.0%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	163	1.2	14.0%	20	1	0.6%	-7.1%
Retail	4533	Used Merchandise Stores	111	1.8	68.2%	45	9	8.1%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	128	1.0	5.8%	7	11	8.6%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	22	0.2	340.0%	17	(1)	-4.5%	6.3%
Retail	4542	Vending Machine Operators	27	1.6	50.0%	9	3	11.1%	-0.7%
Retail	4543	Direct Selling Establishments	18	0.3	-40.0%	(12)	(5)	-27.8%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	49	0.6	19.5%	8	8	16.3%	2.5%
Retail	5322	Consumer Goods Rental	59	0.7	-39.8%	(39)	3	5.1%	-1.0%
Retail	8111	Automotive Repair and Maintenance	553	1.5	12.2%	60	104	18.8%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	24	0.8	-20.0%	(6)	3	12.5%	-2.2%
Retail	8121	Personal Care Services	301	1.0	13.6%	36	82	27.2%	11.4%
Retail	8122	Death Care Services	102	1.7	2.0%	2	8	7.8%	1.2%
Retail	8123	Drycleaning and Laundry Services	76	0.5	-16.5%	(15)	(5)	-6.6%	-0.8%
Retail	8129	Other Personal Services	61	0.5	-47.9%	(56)	10	16.4%	6.0%
Retail	8141	Private Households	94	0.3	40.3%	27	9	9.6%	13.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	230	0.3	27.1%	49	59	25.7%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	99	0.4	-64.9%	(183)	(83)	-83.8%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	55	0.7	-8.3%	(5)	12	21.8%	5.1%
Telecom Services	5179	Other Telecommunications	10	0.2		10	(5)	-50.0%	-4.3%

Cabarrus County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4812	Nonscheduled Air Transportation	36	● 1.8	-49.3%	(35)	(9)	-25.0%	7.0%
Transportation & Logistics	4821	Rail Transportation	57	◐ 0.5	-17.4%	(12)	(2)	-3.5%	0.3%
Transportation & Logistics	4841	General Freight Trucking	417	● 1.0	-42.3%	(306)	(145)	-34.8%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	49	○ 0.3	-48.4%	(46)	(20)	-40.8%	4.9%
Transportation & Logistics	4853	Taxi and Limousine Service	13	○ 0.4	160.0%	8	5	38.5%	1.7%
Transportation & Logistics	4855	Charter Bus Industry	32	● 2.3	540.0%	27	11	34.4%	0.1%
Transportation & Logistics	4884	Support Activities for Road Transportation	44	● 1.1	-54.2%	(52)	2	4.5%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	30	○ 0.4	500.0%	25	(1)	-3.3%	4.4%
Transportation & Logistics	4889	Other Support Activities for Transportation	120	● 9.7	-33.3%	(60)	10	8.3%	-4.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	103	○ 0.5	-17.6%	(22)	(18)	-17.5%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	44	● 2.1	780.0%	39	17	38.6%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	266	● 0.9	421.6%	215	175	65.8%	7.6%
Total	10	Total	62,863	● 1.0	-7.0%	(4,724)	7,743	12.3%	5.2%

Source: Avalanche Consulting using data from EMSI

Catawba County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	66	○ 0.2	-23.3%	(20)	0	0.0%	-1.2%
Agribusiness & Food	1120	Animal Production	11	○ 0.1	-26.7%	(4)	(6)	-54.5%	-1.5%
Agribusiness & Food	3112	Grain and Oilseed Milling	347	● 10.5	-20.8%	(91)	(22)	-6.3%	-1.9%
Agribusiness & Food	3115	Dairy Product Manufacturing	65	● 0.9	-59.1%	(94)	(34)	-52.3%	1.1%
Agribusiness & Food	3116	Animal Slaughtering and Processing	47	○ 0.2	-58.8%	(67)	10	21.3%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	290	● 1.9	57.6%	106	56	19.3%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	238	● 2.5	4.4%	10	12	5.0%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	31	○ 0.3	-47.5%	(28)	(14)	-45.2%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	746	● 1.8	-23.7%	(232)	(207)	-27.7%	6.4%
Agribusiness & Food	4245	Farm Product Raw Material Wholesalers	10	○ 0.2	100.0%	5	(5)	-50.0%	-4.1%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	181	● 1.9	-10.4%	(21)	5	2.8%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	202	● 14.5	-42.3%	(148)	(125)	-61.9%	-26.5%
Apparel & Textiles	3132	Fabric Mills	515	● 19.2	-16.4%	(101)	295	57.3%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	236	● 13.4	-76.9%	(784)	(231)	-97.9%	-33.5%
Apparel & Textiles	3149	Other Textile Product Mills	36	● 1.1	-73.5%	(100)	(31)	-86.1%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	170	● 22.5	-84.8%	(948)	(151)	-88.8%	-52.1%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	13	○ 0.2	-61.8%	(21)	(8)	-61.5%	-33.6%
Apparel & Textiles	3159	Apparel Accessories & Other Apparel Mfg.	63	● 9.4	-72.1%	(163)	(58)	-92.1%	-7.4%
Apparel & Textiles	3169	Other Leather and Allied Product Manufacturing	54	● 9.0	980.0%	49	54	100.0%	-8.4%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	335	● 4.3	318.8%	255	70	20.9%	-3.0%
Automotive	3363	Motor Vehicle Parts Manufacturing	780	● 3.4	9.6%	68	205	26.3%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	130	◐ 0.7	0.8%	1	(17)	-13.1%	0.3%
Back Office	5611	Office Administrative Services	160	◐ 0.6	247.8%	114	59	36.9%	12.4%
Back Office	5612	Facilities Support Services	34	○ 0.4	126.7%	19	18	52.9%	14.8%
Back Office	5613	Employment Services	2,267	● 1.4	-28.2%	(890)	144	6.4%	6.0%
Back Office	5614	Business Support Services	841	● 1.8	877.9%	755	399	47.4%	9.4%
Back Office	5616	Investigation and Security Services	296	◐ 0.6	-15.2%	(53)	15	5.1%	9.9%
Back Office	5617	Services to Buildings and Dwellings	525	◐ 0.5	-32.9%	(257)	42	8.0%	9.8%
Back Office	5619	Other Support Services	76	○ 0.5	-29.6%	(32)	(15)	-19.7%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	38	○ 0.2	52.0%	13	(2)	-5.3%	3.8%
Biomedical Supplies & Labs	4242	Drugs and Druggists' Sundries Wholesalers	188	● 1.7	-9.6%	(20)	(8)	-4.3%	9.6%

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Detailed Clusters, 4-Digit NAICS

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	104	● 0.8	-23.5%	(32)	10	9.6%	16.3%
Building & Construction	2361	Residential Building Construction	254	● 0.8	-30.8%	(113)	117	46.1%	6.4%
Building & Construction	2362	Nonresidential Building Construction	236	◐ 0.6	-51.8%	(254)	(94)	-39.8%	6.1%
Building & Construction	2371	Utility System Construction	267	● 1.2	0.8%	2	33	12.4%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	141	● 0.9	-13.5%	(22)	(9)	-6.4%	6.3%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	294	● 0.8	-23.6%	(91)	17	5.8%	4.7%
Building & Construction	2382	Building Equipment Contractors	825	● 0.9	-4.3%	(37)	166	20.1%	8.5%
Building & Construction	2383	Building Finishing Contractors	157	○ 0.4	-42.3%	(115)	(6)	-3.8%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	186	◐ 0.6	-24.7%	(61)	15	8.1%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	107	● 2.4	-25.2%	(36)	(4)	-3.7%	-10.3%
Building & Construction	3212	Veneer, Plywood, & Engineered Wood Prod. Mfg.	10	○ 0.3	-50.0%	(10)	(5)	-50.0%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	172	● 1.7	-34.6%	(91)	(100)	-58.1%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	33	● 1.5	560.0%	28	(22)	-66.7%	-7.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	218	● 2.3	-14.5%	(37)	91	41.7%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	175	● 4.7	-39.0%	(112)	(62)	-35.4%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	94	● 0.9	-17.5%	(20)	(6)	-6.4%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	206	● 1.6	2.0%	4	25	12.1%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	600	● 1.0	-16.3%	(117)	(40)	-6.7%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	54	● 0.7	-14.3%	(9)	3	5.6%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	116	● 0.8	-29.7%	(49)	(9)	-7.8%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	146	● 0.8	-26.6%	(53)	(53)	-36.3%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	66	◐ 0.6	-38.9%	(42)	(10)	-15.2%	1.3%
Culture & Entertainment	7111	Performing Arts Companies	38	◐ 0.6	-9.5%	(4)	0	0.0%	1.6%
Culture & Entertainment	7112	Spectator Sports	59	● 0.8	-75.1%	(178)	(5)	-8.5%	7.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	18	○ 0.3	260.0%	13	3	16.7%	9.5%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	97	● 1.3	31.1%	23	22	22.7%	8.8%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	615	● 1.0	-10.2%	(70)	102	16.6%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	381	○ 0.4	-16.1%	(73)	(5)	-1.3%	3.2%
Culture & Entertainment	7212	RV Parks and Recreational Camps	23	● 0.8	-4.2%	(1)	6	26.1%	10.3%
Culture & Entertainment	7221	Full-Service Restaurants	2,739	● 1.0	-2.5%	(69)	253	9.2%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	2,616	● 1.1	-11.9%	(354)	365	14.0%	6.5%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7223	Special Food Services	255	● 0.8	168.4%	160	(65)	-25.5%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	166	● 0.8	-34.9%	(89)	24	14.5%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	106	○ 0.3	53.6%	37	20	18.9%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	381	◐ 0.6	33.7%	96	(9)	-2.4%	11.7%
Education	6114	Business Schools and Computer and Management T	21	○ 0.5	320.0%	16	(4)	-19.0%	3.0%
Education	6115	Technical and Trade Schools (Private)	34	○ 0.4	-30.6%	(15)	(3)	-8.8%	14.1%
Education	6116	Other Schools and Instruction (Private)	152	● 0.8	111.1%	80	12	7.9%	16.8%
Education	6117	Educational Support Services (Private)	28	○ 0.4	460.0%	23	12	42.9%	23.6%
Electronics	3342	Communications Equipment Manufacturing	364	● 6.1	-16.1%	(70)	47	12.9%	-8.5%
Electronics	3344	Semiconductor & Other Electronic Comp. Mfg.	79	○ 0.4	-37.3%	(47)	(74)	-93.7%	-14.0%
Electronics	3346	Mfg. & Reproducing Magnetic & Optical Media	12	● 0.9	-72.7%	(32)	(7)	-58.3%	-13.1%
Electronics	3359	Other Electrical Equipment & Comp. Mfg.	2,043	● 30.5	-25.7%	(708)	(231)	-11.3%	-3.0%
Electronics	4236	Electrical and Electronic Goods Wholesalers	199	● 1.2	13.7%	24	34	17.1%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	244	◐ 0.5	-1.2%	(3)	0	0.0%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	25	○ 0.5	-7.4%	(2)	(1)	-4.0%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	229	● 1.0	13.9%	28	(105)	-45.9%	-3.7%
Energy	2212	Natural Gas Distribution	76	● 1.2	-38.7%	(48)	(10)	-13.2%	0.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	62	● 0.9	-18.4%	(14)	(1)	-1.6%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	23	○ 0.4	-17.9%	(5)	(9)	-39.1%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	299	● 1.2	-35.0%	(161)	17	5.7%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	157	◐ 0.6	-25.2%	(53)	28	17.8%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	67	○ 0.3	9.8%	6	6	9.0%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	37	○ 0.3	15.6%	5	0	0.0%	-0.2%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	231	○ 0.3	-24.8%	(76)	16	6.9%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	38	◐ 0.5	-34.5%	(20)	(1)	-2.6%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	60	○ 0.3	-36.2%	(34)	(13)	-21.7%	3.0%
Finance	5221	Depository Credit Intermediation	511	◐ 0.5	-40.2%	(343)	(63)	-12.3%	3.4%
Finance	5222	Nondepository Credit Intermediation	93	○ 0.3	-69.4%	(211)	(33)	-35.5%	-2.5%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	69	○ 0.3	16.9%	10	(6)	-8.7%	3.1%
Finance	5239	Other Financial Investment Activities	90	○ 0.5	143.2%	53	3	3.3%	6.8%
Finance	5241	Insurance Carriers	93	○ 0.1	-38.4%	(58)	(2)	-2.2%	-0.7%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	409	● 0.8	-2.9%	(12)	111	27.1%	7.6%
Finance	5311	Lessors of Real Estate	111	○ 0.3	38.8%	31	(2)	-1.8%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	72	○ 0.5	-14.3%	(12)	(23)	-31.9%	5.2%
Finance	5313	Activities Related to Real Estate	91	○ 0.3	11.0%	9	(2)	-2.2%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	6,420	● 54.9	-37.0%	(3,773)	(1,587)	-24.7%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Mfg.	582	● 11.2	-41.6%	(415)	(356)	-61.2%	-5.8%
Furniture	3379	Other Furniture Related Product Manufacturing	14	◐ 0.7	-50.0%	(14)	(9)	-64.3%	-6.3%
Furniture	4232	Furniture and Home Furnishing Wholesalers	108	● 2.1	-27.5%	(41)	(18)	-16.7%	1.6%
Government	5621	Waste Collection	140	● 1.7	-4.1%	(6)	7	5.0%	8.7%
Government	5629	Remediation and Other Waste Management Svcs.	10	○ 0.1	-16.7%	(2)	0	0.0%	8.6%
Government	9011	Federal Government, Civilian	635	○ 0.4	22.1%	115	(20)	-3.1%	1.4%
Government	9012	Federal Government, Military	394	○ 0.3	-1.7%	(7)	2	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	1,024	◐ 0.6	10.7%	99	10	1.0%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	493	○ 0.4	-1.2%	(6)	2	0.4%	3.8%
Government	9036	Education and Hospitals (Local Government)	4,813	● 1.0	-9.4%	(498)	416	8.6%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	2,702	● 0.9	-0.6%	(17)	275	10.2%	4.8%
Healthcare	6211	Offices of Physicians	1,951	● 1.4	8.2%	148	360	18.5%	14.0%
Healthcare	6212	Offices of Dentists	465	● 0.9	4.3%	19	64	13.8%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	220	◐ 0.5	4.3%	9	32	14.5%	17.6%
Healthcare	6214	Outpatient Care Centers	313	● 0.9	201.0%	209	86	27.5%	15.1%
Healthcare	6216	Home Health Care Services	569	● 0.8	1.4%	8	37	6.5%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	32	○ 0.2	-20.0%	(8)	3	9.4%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	1,509	◐ 0.6	-21.5%	(414)	19	1.3%	6.6%
Healthcare	6231	Nursing Care Facilities	841	● 0.9	2.8%	23	77	9.2%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	174	◐ 0.5	-14.7%	(30)	8	4.6%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	778	● 1.7	23.5%	148	36	4.6%	12.4%
Healthcare	6239	Other Residential Care Facilities	85	● 0.9	14.9%	11	(11)	-12.9%	8.8%
Healthcare	6241	Individual and Family Services	835	● 1.1	27.3%	179	426	51.0%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	36	○ 0.4	89.5%	17	15	41.7%	9.9%
Healthcare	6244	Child Day Care Services	336	● 0.7	10.2%	31	8	2.4%	8.7%
Industrial Machinery	3331	Agriculture, Construction, & Mining Machinery Mfg.	22	○ 0.2	46.7%	7	5	22.7%	-0.9%

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Detailed Clusters, 4-Digit NAICS

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	3332	Industrial Machinery Manufacturing	75	● 1.4	158.6%	46	(23)	-30.7%	-13.2%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	30	○ 0.4	-67.4%	(62)	14	46.7%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	38	○ 0.4	-84.4%	(206)	(33)	-86.8%	-4.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	115	● 0.9	74.2%	49	(20)	-17.4%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	11	○ 0.5	-90.6%	(106)	(6)	-54.5%	-11.6%
Industrial Machinery	4234	Prof. & Commercial Equip. & Supplies Wholesalers	331	● 1.0	173.6%	210	62	18.7%	0.2%
Industrial Machinery	4238	Machinery, Equip., & Supplies Wholesalers	377	● 1.1	-10.7%	(45)	(45)	-11.9%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	77	○ 0.5	75.0%	33	(6)	-7.8%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	39	○ 0.4	-62.1%	(64)	(17)	-43.6%	3.3%
Logging & Metal/Mineral Mii	1133	Logging	26	● 1.0	420.0%	21	(1)	-3.8%	-4.2%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	15	○ 0.3	-58.3%	(21)	(3)	-20.0%	-2.9%
Materials	3222	Converted Paper Product Manufacturing	1,618	● 10.5	-0.7%	(12)	(52)	-3.2%	-10.3%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	217	● 4.4	-34.8%	(116)	(123)	-56.7%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	70	● 2.2	14.8%	9	7	10.0%	-1.0%
Materials	3259	Other Chemical Product & Prep. Manufacturing	55	● 1.2	243.8%	39	41	74.5%	-7.6%
Materials	3261	Plastics Product Manufacturing	1,262	● 4.6	-10.7%	(151)	7	0.6%	-4.9%
Materials	3262	Rubber Product Manufacturing	234	● 3.6	-64.2%	(420)	(184)	-78.6%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	70	● 1.0	-21.3%	(19)	(1)	-1.4%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	10	○ 0.1	-63.0%	(17)	(5)	-50.0%	-2.6%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	517	● 16.4	117.2%	279	248	48.0%	-4.0%
Metalworking	3314	Nonferrous Metal Production and Processing	129	● 3.8	-47.3%	(116)	(17)	-13.2%	-7.7%
Metalworking	3321	Forging and Stamping	27	◐ 0.5	-80.0%	(108)	(22)	-81.5%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	134	● 6.3	16.5%	19	5	3.7%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	130	◐ 0.7	-37.5%	(78)	(10)	-7.7%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	50	● 1.0	108.3%	26	(5)	-10.0%	-5.3%
Metalworking	3325	Hardware Manufacturing	260	● 20.9	-30.5%	(114)	(134)	-51.5%	-12.1%
Metalworking	3326	Spring and Wire Product Manufacturing	44	● 1.9	-20.0%	(11)	(29)	-65.9%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	69	○ 0.4	-33.0%	(34)	(17)	-24.6%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	36	◐ 0.5	5.9%	2	6	16.7%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	82	◐ 0.6	-25.5%	(28)	(27)	-32.9%	-5.4%
Non-Profits	8133	Social Advocacy Organizations	30	○ 0.3	30.4%	7	18	60.0%	7.4%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Non-Profits	8134	Civic and Social Organizations	137	0.6	-62.6%	(229)	(53)	-38.7%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	24	0.1	-22.6%	(7)	9	37.5%	6.6%
Professional Services	5411	Legal Services	228	0.4	-13.6%	(36)	(2)	-0.9%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	239	0.4	-15.8%	(45)	7	2.9%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	242	0.7	21.0%	42	21	8.7%	8.5%
Professional Services	5511	Management of Companies and Enterprises	1,970	1.8	10.7%	190	191	9.7%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	382	0.6	52.2%	131	144	37.7%	28.1%
Research	5417	Scientific Research and Development Services	19	0.1	280.0%	14	16	84.2%	9.8%
Retail	4411	Automobile Dealers	998	1.7	-11.1%	(124)	41	4.1%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	157	2.1	-17.4%	(33)	7	4.5%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	419	1.5	-6.3%	(28)	9	2.1%	1.0%
Retail	4421	Furniture Stores	162	1.3	-57.6%	(220)	(71)	-43.8%	1.6%
Retail	4422	Home Furnishings Stores	152	1.2	26.7%	32	104	68.4%	2.6%
Retail	4431	Electronics and Appliance Stores	251	0.9	-38.5%	(157)	20	8.0%	2.9%
Retail	4451	Grocery Stores	1,098	0.8	-5.0%	(58)	(144)	-13.1%	2.3%
Retail	4452	Specialty Food Stores	18	0.2	-48.6%	(17)	(4)	-22.2%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	17	0.2	-15.0%	(3)	(3)	-17.6%	1.7%
Retail	4461	Health and Personal Care Stores	581	1.0	7.6%	41	74	12.7%	6.6%
Retail	4471	Gasoline Stations	541	1.2	16.3%	76	102	18.9%	-2.3%
Retail	4481	Clothing Stores	810	1.3	-8.1%	(71)	115	14.2%	3.6%
Retail	4482	Shoe Stores	64	0.6	-36.6%	(37)	(31)	-48.4%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	79	1.0	-31.3%	(36)	(28)	-35.4%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	343	1.3	-5.0%	(18)	(6)	-1.7%	4.9%
Retail	4512	Book, Periodical, and Music Stores	66	0.9	-14.3%	(11)	9	13.6%	-10.2%
Retail	4521	Department Stores	663	0.8	-25.9%	(232)	(259)	-39.1%	-3.3%
Retail	4529	Other General Merchandise Stores	1,390	1.6	0.4%	6	179	12.9%	15.1%
Retail	4531	Florists	60	1.6	-17.8%	(13)	10	16.7%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	183	1.1	-24.7%	(60)	(30)	-16.4%	-7.1%
Retail	4533	Used Merchandise Stores	48	0.6	-5.9%	(3)	(1)	-2.1%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	218	1.4	9.0%	18	16	7.3%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	29	0.2	-23.7%	(9)	5	17.2%	6.3%

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With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4542	Vending Machine Operators	136	● 6.6	-1.4%	(2)	(18)	-13.2%	-0.7%
Retail	4543	Direct Selling Establishments	79	● 1.1	12.9%	9	(7)	-8.9%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	34	○ 0.4	-77.5%	(117)	(11)	-32.4%	2.5%
Retail	5322	Consumer Goods Rental	192	● 1.9	3.8%	7	29	15.1%	-1.0%
Retail	5323	General Rental Centers	20	● 0.9	-45.9%	(17)	2	10.0%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental and Leasing	15	○ 0.2	-16.7%	(3)	0	0.0%	0.9%
Retail	8111	Automotive Repair and Maintenance	489	● 1.1	-1.6%	(8)	26	5.3%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	65	● 1.8	30.0%	15	(8)	-12.3%	-2.2%
Retail	8121	Personal Care Services	169	○ 0.5	3.7%	6	24	14.2%	11.4%
Retail	8122	Death Care Services	91	● 1.2	1.1%	1	5	5.5%	1.2%
Retail	8123	Drycleaning and Laundry Services	286	● 1.7	-24.3%	(92)	(32)	-11.2%	-0.8%
Retail	8129	Other Personal Services	24	○ 0.2	-41.5%	(17)	4	16.7%	6.0%
Retail	8141	Private Households	54	○ 0.1	-18.2%	(12)	(11)	-20.4%	13.6%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	55	○ 0.4	31.0%	13	0	0.0%	15.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	146	○ 0.2	64.0%	57	36	24.7%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	142	○ 0.5	-17.4%	(30)	(25)	-17.6%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	100	● 1.1	37.0%	27	(7)	-7.0%	5.1%
Transportation & Logistics	4811	Scheduled Air Transportation	29	○ 0.1		29	(24)	-82.8%	1.1%
Transportation & Logistics	4821	Rail Transportation	13	○ 0.1	-27.8%	(5)	(2)	-15.4%	0.3%
Transportation & Logistics	4841	General Freight Trucking	1,998	● 4.0	-25.9%	(698)	295	14.8%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	54	○ 0.2	-19.4%	(13)	(9)	-16.7%	4.9%
Transportation & Logistics	4884	Support Activities for Road Transportation	140	● 2.8	-34.3%	(73)	65	46.4%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	68	◐ 0.7	-18.1%	(15)	(3)	-4.4%	4.4%
Transportation & Logistics	4921	Couriers and Express Delivery Services	320	● 1.2	-21.0%	(85)	(17)	-5.3%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	23	● 0.9	0.0%	0	2	8.7%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	688	● 1.9	719.0%	604	123	17.9%	7.6%
Total	10	Total	75,769	● 1.0	-15.0%	(13,371)	1,291	1.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Cleveland County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product & Parts Mfg.	281	● 2.5	-30.6%	(124)	(93)	-33.1%	0.2%
Agribusiness & Food	1110	Crop Production	75	● 0.6	29.3%	17	(10)	-13.3%	-1.2%
Agribusiness & Food	1120	Animal Production	30	● 0.6	-6.3%	(2)	1	3.3%	-1.5%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	16	○ 0.2	60.0%	6	(4)	-25.0%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	39	● 1.0	-31.6%	(18)	(10)	-25.6%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	11	○ 0.3		11	6	54.5%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	123	● 0.7	-15.2%	(22)	(4)	-3.3%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	18	● 0.5	50.0%	6	3	16.7%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	175	● 30.4	-26.8%	(64)	(155)	-88.6%	-26.5%
Apparel & Textiles	3132	Fabric Mills	176	● 15.9	-27.9%	(68)	(171)	-97.2%	-34.2%
Apparel & Textiles	3141	Textile Furnishings Mills	13	● 1.1	-35.0%	(7)	(8)	-61.5%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	260	● 19.2	-16.4%	(51)	21	8.1%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	10	● 3.2	0.0%	0	(10)	-100.0%	-52.1%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	90	● 2.8	12.5%	10	11	12.2%	-3.0%
Automotive	3361	Motor Vehicle Manufacturing	26	● 0.7	420.0%	21	(1)	-3.8%	-6.4%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	162	● 6.3	-65.5%	(308)	(125)	-77.2%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	519	● 5.5	-8.3%	(47)	235	45.3%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	96	● 1.3	-15.8%	(18)	(14)	-14.6%	0.3%
Back Office	5613	Employment Services	730	● 1.1	-31.1%	(330)	(217)	-29.7%	6.0%
Back Office	5614	Business Support Services	10	○ 0.1	-75.0%	(30)	1	10.0%	9.4%
Back Office	5617	Services to Buildings and Dwellings	385	● 0.9	-9.6%	(41)	59	15.3%	9.8%
Back Office	5619	Other Support Services	47	● 0.7	176.5%	30	11	23.4%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	11	○ 0.2		11	12	109.1%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	59	● 0.8	7.3%	4	(10)	-16.9%	3.8%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	18	○ 0.3	260.0%	13	11	61.1%	16.3%
Building & Construction	2361	Residential Building Construction	184	● 1.4	-29.2%	(76)	42	22.8%	6.4%
Building & Construction	2362	Nonresidential Building Construction	49	○ 0.3	-49.5%	(48)	(21)	-42.9%	6.1%
Building & Construction	2371	Utility System Construction	201	● 2.2	2.0%	4	44	21.9%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	50	● 0.8	-40.5%	(34)	9	18.0%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	55	● 2.4	71.9%	23	(41)	-74.5%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	236	● 1.5	8.8%	19	91	38.6%	4.7%

Cleveland County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2382	Building Equipment Contractors	218	● 0.6	-25.6%	(75)	3	1.4%	8.5%
Building & Construction	2383	Building Finishing Contractors	62	○ 0.4	-41.0%	(43)	(10)	-16.1%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	159	● 1.3	-34.0%	(82)	4	2.5%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	39	● 2.1	680.0%	34	7	17.9%	-10.3%
Building & Construction	3212	Veneer, Plywood, & Eng. Wood Product Mfg.	34	● 2.5	-66.3%	(67)	(12)	-35.3%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	14	○ 0.3	-77.8%	(49)	(9)	-64.3%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	55	● 6.2	-50.9%	(57)	2	3.6%	-7.3%
Building & Construction	3272	Glass and Glass Product Manufacturing	347	● 20.1	-27.6%	(132)	(265)	-76.4%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	26	● 0.7	-58.1%	(36)	(1)	-3.8%	3.7%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	17	○ 0.4	-69.1%	(38)	(3)	-17.6%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	59	● 1.1	5.4%	3	9	15.3%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	289	● 1.2	17.5%	43	74	25.6%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	65	● 2.2	16.1%	9	16	24.6%	0.6%
Consumer Goods Mfg	4249	Misc. Nondurable Goods Merchant Wholesalers	24	○ 0.3	-66.2%	(47)	(10)	-41.7%	-0.4%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	118	● 0.5	-31.4%	(54)	(16)	-13.6%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	128	○ 0.3	-24.7%	(42)	10	7.8%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	934	● 0.9	-2.6%	(25)	62	6.6%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	1,249	● 1.3	-1.6%	(20)	62	5.0%	6.5%
Culture & Entertainment	7223	Special Food Services	73	● 0.6	15.9%	10	9	12.3%	4.3%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	760	● 2.7	16.9%	110	71	9.3%	11.7%
Education	6116	Other Schools and Instruction (Private)	27	○ 0.3	8.0%	2	0	0.0%	16.8%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	149	● 1.8	2880.0%	144	(57)	-38.3%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	42	● 0.4		42	7	16.7%	-0.4%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	42	○ 0.2	-58.4%	(59)	(8)	-19.0%	14.4%
Energy	2211	Electric Power Gen., Transmission & Distribution	17	○ 0.2	-10.5%	(2)	(12)	-70.6%	-3.7%
Energy	4247	Petroleum and Petroleum Products Wholesalers	66	● 3.1	-50.7%	(68)	(38)	-57.6%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	93	● 0.9	14.8%	12	(40)	-43.0%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	62	● 0.6	-57.5%	(84)	(33)	-53.2%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	37	● 0.5	-41.3%	(26)	(3)	-8.1%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	36	● 0.7	-37.9%	(22)	(5)	-13.9%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	21	● 1.1	40.0%	6	14	66.7%	9.8%

Cleveland County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	53	○ 0.2	-56.9%	(70)	(20)	-37.7%	8.0%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	79	● 0.8	17.9%	12	1	1.3%	3.0%
Finance	5221	Depository Credit Intermediation	377	● 0.9	-11.1%	(47)	29	7.7%	3.4%
Finance	5222	Nondepository Credit Intermediation	81	● 0.6	15.7%	11	10	12.3%	-2.5%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	34	○ 0.3	41.7%	10	5	14.7%	3.1%
Finance	5239	Other Financial Investment Activities	26	○ 0.3	420.0%	21	4	15.4%	6.8%
Finance	5241	Insurance Carriers	63	○ 0.2	125.0%	35	17	27.0%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	98	● 0.5	-10.9%	(12)	3	3.1%	7.6%
Finance	5311	Lessors of Real Estate	36	○ 0.3	-16.3%	(7)	1	2.8%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	21	○ 0.3	-50.0%	(21)	(7)	-33.3%	5.2%
Finance	5313	Activities Related to Real Estate	45	○ 0.3	60.7%	17	11	24.4%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	105	● 2.2	-49.3%	(102)	117	111.4%	-4.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	136	● 6.3	115.9%	73	62	45.6%	1.6%
Government	5621	Waste Collection	48	● 1.4	0.0%	0	7	14.6%	8.7%
Government	9011	Federal Government, Civilian	216	○ 0.3	10.8%	21	(1)	-0.5%	1.4%
Government	9012	Federal Government, Military	254	● 0.5	0.8%	2	1	0.4%	0.8%
Government	9026	Education and Hospitals (State Government)	567	● 0.9	7.0%	37	2	0.4%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	446	● 0.8	-7.7%	(37)	0	0.0%	3.8%
Government	9036	Education and Hospitals (Local Government)	2,314	● 1.1	-18.5%	(524)	213	9.2%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	1,983	● 1.5	8.0%	147	191	9.6%	4.8%
Healthcare	6211	Offices of Physicians	563	● 1.0	-5.9%	(35)	126	22.4%	14.0%
Healthcare	6212	Offices of Dentists	236	● 1.2	14.0%	29	55	23.3%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	98	● 0.6	-3.9%	(4)	22	22.4%	17.6%
Healthcare	6214	Outpatient Care Centers	157	● 1.0	8.3%	12	32	20.4%	15.1%
Healthcare	6216	Home Health Care Services	439	● 1.6	-2.9%	(13)	58	13.2%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	71	● 1.1	173.1%	45	19	26.8%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	1,789	● 1.7	6.2%	104	197	11.0%	6.6%
Healthcare	6231	Nursing Care Facilities	691	● 1.7	2.1%	14	100	14.5%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	210	● 1.5	438.5%	171	58	27.6%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	304	● 1.6	85.4%	140	75	24.7%	12.4%
Healthcare	6239	Other Residential Care Facilities	60	● 1.6	-63.6%	(105)	(22)	-36.7%	8.8%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Healthcare	6241	Individual and Family Services	295	● 1.0	-62.0%	(481)	45	15.3%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	224	● 6.4	21.1%	39	50	22.3%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	14	○ 0.2	-57.6%	(19)	(4)	-28.6%	10.1%
Healthcare	6244	Child Day Care Services	235	● 1.3	-5.6%	(14)	26	11.1%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	10	○ 0.2	-75.0%	(30)	(5)	-50.0%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	86	● 3.8	-37.7%	(52)	(57)	-66.3%	-13.2%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	112	● 3.8	-0.9%	(1)	(90)	-80.4%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	18	● 0.5	260.0%	13	2	11.1%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	39	● 1.8	-70.0%	(91)	28	71.8%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	347	● 6.5	-4.7%	(17)	32	9.2%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	18	● 1.8	-77.8%	(63)	(13)	-72.2%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	373	● 12.2	-29.8%	(158)	(38)	-10.2%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	137	● 1.0	-4.9%	(7)	38	27.7%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	53	○ 0.4	-56.9%	(70)	(30)	-56.6%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	152	● 2.2	-25.5%	(52)	(1)	-0.7%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	63	● 1.5	14.5%	8	(4)	-6.3%	3.3%
Logging & Metal/Mineral Mi	2123	Nonmetallic Mineral Mining and Quarrying	74	● 3.6	-21.3%	(20)	13	17.6%	-2.9%
Materials	3222	Converted Paper Product Manufacturing	153	● 2.4	-11.0%	(19)	(36)	-23.5%	-10.3%
Materials	3251	Basic Chemical Manufacturing	31	● 1.0	19.2%	5	(8)	-25.8%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Artificial Synth. Fibers Mfg.	109	● 5.4	-63.3%	(188)	(70)	-64.2%	-6.9%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	26	● 1.1	420.0%	21	5	19.2%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	173	● 9.2	10.9%	17	7	4.0%	-7.6%
Materials	3261	Plastics Product Manufacturing	77	● 0.7	-29.4%	(32)	64	83.1%	-4.9%
Materials	3262	Rubber Product Manufacturing	12	● 0.4	-70.0%	(28)	(7)	-58.3%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	15	● 0.5	36.4%	4	4	26.7%	-5.2%
Metalworking	3314	Nonferrous Metal Production and Processing	153	● 11.0	-25.7%	(53)	13	8.5%	-7.7%
Metalworking	3323	Architectural and Structural Metals Manufacturing	116	● 1.5	73.1%	49	59	50.9%	1.9%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	16	○ 0.2	-40.7%	(11)	(11)	-68.8%	-4.3%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	31	● 0.5	106.7%	16	(2)	-6.5%	-5.4%
Non-Profits	8132	Grantmaking and Giving Services	11	○ 0.4	0.0%	0	1	9.1%	6.9%
Non-Profits	8134	Civic and Social Organizations	246	● 2.6	4.7%	11	16	6.5%	5.6%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	21	○ 0.2	320.0%	16	14	66.7%	6.6%
Professional Services	5411	Legal Services	90	○ 0.3	9.8%	8	0	0.0%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	118	● 0.5	-6.3%	(8)	10	8.5%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	59	○ 0.4	-19.2%	(14)	(4)	-6.8%	8.5%
Professional Services	5511	Management of Companies and Enterprises	96	○ 0.2	134.1%	55	(26)	-27.1%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	185	● 0.7	20.1%	31	71	38.4%	28.1%
Research	5417	Scientific Research and Development Services	16	○ 0.1		16	5	31.3%	9.8%
Retail	4411	Automobile Dealers	216	● 0.9	-26.0%	(76)	(24)	-11.1%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	32	● 1.0	-40.7%	(22)	1	3.1%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	215	● 1.8	-3.6%	(8)	42	19.5%	1.0%
Retail	4421	Furniture Stores	45	● 0.9	-31.8%	(21)	5	11.1%	1.6%
Retail	4422	Home Furnishings Stores	41	● 0.8	-18.0%	(9)	25	61.0%	2.6%
Retail	4431	Electronics and Appliance Stores	59	● 0.5	-11.9%	(8)	(19)	-32.2%	2.9%
Retail	4451	Grocery Stores	746	● 1.3	31.6%	179	(59)	-7.9%	2.3%
Retail	4452	Specialty Food Stores	20	○ 0.4	33.3%	5	0	0.0%	-4.9%
Retail	4461	Health and Personal Care Stores	408	● 1.7	7.4%	28	92	22.5%	6.6%
Retail	4471	Gasoline Stations	188	● 1.0	-34.3%	(98)	(32)	-17.0%	-2.3%
Retail	4481	Clothing Stores	65	○ 0.2	-39.8%	(43)	(9)	-13.8%	3.6%
Retail	4482	Shoe Stores	27	● 0.6	-18.2%	(6)	(9)	-33.3%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	29	● 0.9	-34.1%	(15)	(16)	-55.2%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	60	● 0.5	46.3%	19	0	0.0%	4.9%
Retail	4521	Department Stores	192	● 0.6	-11.5%	(25)	(51)	-26.6%	-3.3%
Retail	4529	Other General Merchandise Stores	844	● 2.3	0.0%	0	78	9.2%	15.1%
Retail	4531	Florists	12	● 0.8	-47.8%	(11)	(7)	-58.3%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	48	● 0.7	-49.5%	(47)	(16)	-33.3%	-7.1%
Retail	4533	Used Merchandise Stores	27	● 0.9	12.5%	3	(2)	-7.4%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	114	● 1.8	60.6%	43	4	3.5%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	63	● 1.1	1160.0%	58	8	12.7%	6.3%
Retail	4542	Vending Machine Operators	12	● 1.4	-82.9%	(58)	(7)	-58.3%	-0.7%
Retail	5321	Automotive Equipment Rental and Leasing	35	● 0.9	-5.4%	(2)	6	17.1%	2.5%
Retail	5322	Consumer Goods Rental	24	● 0.6	-41.5%	(17)	(9)	-37.5%	-1.0%

Cleveland County, NC Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	8111	Automotive Repair and Maintenance	267	● 1.4	1.1%	3	31	11.6%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	18	● 1.2	-56.1%	(23)	(1)	-5.6%	-2.2%
Retail	8121	Personal Care Services	48	○ 0.3	-5.9%	(3)	3	6.3%	11.4%
Retail	8122	Death Care Services	45	● 1.5	-2.2%	(1)	(2)	-4.4%	1.2%
Retail	8123	Drycleaning and Laundry Services	40	● 0.6	-16.7%	(8)	(9)	-22.5%	-0.8%
Retail	8129	Other Personal Services	17	○ 0.3	54.5%	6	3	17.6%	6.0%
Retail	8141	Private Households	22	○ 0.1	-4.3%	(1)	(8)	-36.4%	13.6%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	20	○ 0.4	300.0%	15	12	60.0%	15.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	41	○ 0.1	156.3%	25	9	22.0%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	11	○ 0.1	-45.0%	(9)	(6)	-54.5%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	11	○ 0.3	-26.7%	(4)	(6)	-54.5%	5.1%
Transportation & Logistics	4821	Rail Transportation	12	○ 0.2	-14.3%	(2)	(1)	-8.3%	0.3%
Transportation & Logistics	4841	General Freight Trucking	361	● 1.7	-24.9%	(120)	16	4.4%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	34	○ 0.4	41.7%	10	7	20.6%	4.9%
Transportation & Logistics	4854	School and Employee Bus Transportation	13	○ 0.3	160.0%	8	0	0.0%	7.4%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	25	● 1.3	-26.5%	(9)	(3)	-12.0%	10.6%
Transportation & Logistics	4921	Couriers and Express Delivery Services	131	● 1.2	19.1%	21	31	23.7%	1.9%
Transportation & Logistics	4931	Warehousing and Storage	1,411	● 9.3	114.8%	754	448	31.8%	7.6%
Total	10	Total	31,290	● 1.0	-9.6%	(3,332)	1,445	4.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	17	○ 0.1	-54.1%	(20)	(12)	-70.6%	0.2%
Agribusiness & Food	1110	Crop Production	15	○ 0.1	200.0%	10	0	0.0%	-1.2%
Agribusiness & Food	3116	Animal Slaughtering and Processing	67	○ 0.3	-11.8%	(9)	0	0.0%	2.3%
Agribusiness & Food	3119	Other Food Manufacturing	118	◐ 1.5	96.7%	58	(10)	-8.5%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	21	○ 0.3	-52.3%	(23)	(3)	-14.3%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	310	◑ 0.9	12.3%	34	(35)	-11.3%	6.4%
Agribusiness & Food	4245	Farm Product Raw Material Merchant Wholesalers	24	◑ 0.7	84.6%	11	(13)	-54.2%	-4.1%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	61	◑ 0.7	-32.2%	(29)	(10)	-16.4%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	1,352	● 114.1	-54.2%	(1,599)	(488)	-36.1%	-26.5%
Apparel & Textiles	3132	Fabric Mills	399	● 17.5	-1.5%	(6)	306	76.7%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	360	● 24.1	-40.3%	(243)	(360)	-100.0%	-33.5%
Apparel & Textiles	3149	Other Textile Product Mills	110	● 3.9	27.9%	24	(13)	-11.8%	-6.4%
Apparel & Textiles	3169	Other Leather and Allied Product Manufacturing	21	● 4.1	320.0%	16	4	19.0%	-8.4%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	57	◑ 0.9	58.3%	21	(15)	-26.3%	-3.0%
Automotive	3363	Motor Vehicle Parts Manufacturing	2,306	● 11.9	-20.6%	(600)	(226)	-9.8%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	35	○ 0.2	-22.2%	(10)	(30)	-85.7%	0.3%
Back Office	5611	Office Administrative Services	48	○ 0.2	-9.4%	(5)	1	2.1%	12.4%
Back Office	5613	Employment Services	2,556	● 1.9	29.2%	577	185	7.2%	6.0%
Back Office	5614	Business Support Services	50	○ 0.1	-42.5%	(37)	4	8.0%	9.4%
Back Office	5616	Investigation and Security Services	76	○ 0.2	-46.9%	(67)	(14)	-18.4%	9.9%
Back Office	5617	Services to Buildings and Dwellings	1,365	● 1.6	22.1%	247	214	15.7%	9.8%
Back Office	5619	Other Support Services	245	● 1.8	21.3%	43	88	35.9%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	64	○ 0.4	73.0%	27	35	54.7%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	60	◑ 0.6	1100.0%	55	24	40.0%	9.6%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	109	◑ 0.9	13.5%	13	37	33.9%	16.3%
Building & Construction	2213	Water, Sewage and Other Systems	14	◑ 0.6	180.0%	9	(1)	-7.1%	9.4%
Building & Construction	2361	Residential Building Construction	104	○ 0.4	-51.9%	(112)	(50)	-48.1%	6.4%
Building & Construction	2362	Nonresidential Building Construction	190	◑ 0.6	-21.5%	(52)	(8)	-4.2%	6.1%
Building & Construction	2371	Utility System Construction	47	○ 0.2	-73.3%	(129)	33	70.2%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	57	○ 0.4	-50.0%	(57)	0	0.0%	6.3%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	423	◑ 1.3	-34.7%	(225)	89	21.0%	4.7%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2382	Building Equipment Contractors	913	1.1	-23.0%	(272)	99	10.8%	8.5%
Building & Construction	2383	Building Finishing Contractors	431	1.4	-19.9%	(107)	67	15.5%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	563	2.2	-1.1%	(6)	182	32.3%	7.7%
Building & Construction	3219	Other Wood Product Manufacturing	24	0.3	-41.5%	(17)	(3)	-12.5%	-6.4%
Building & Construction	3272	Glass and Glass Product Manufacturing	64	1.8	-30.4%	(28)	(12)	-18.8%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	31	0.4	-59.2%	(45)	(4)	-12.9%	3.7%
Building & Construction	3274	Lime and Gypsum Product Manufacturing	21	3.4	320.0%	16	(16)	-76.2%	-15.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	81	0.9	58.8%	30	24	29.6%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	115	1.1	-5.0%	(6)	8	7.0%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	492	1.0	-12.5%	(70)	57	11.6%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	96	1.5	9.1%	8	12	12.5%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	401	3.2	-11.1%	(50)	2	0.5%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	89	0.6	18.7%	14	(23)	-25.8%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	11	0.1	-50.0%	(11)	(6)	-54.5%	1.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	14	0.3	180.0%	9	6	42.9%	9.5%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	107	1.6	132.6%	61	31	29.0%	8.8%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	307	0.6	-40.6%	(210)	(5)	-1.6%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	208	0.2	-11.9%	(28)	26	12.5%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	2,316	1.0	-7.2%	(180)	(9)	-0.4%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	3,217	1.6	10.4%	304	256	8.0%	6.5%
Culture & Entertainment	7223	Special Food Services	24	0.1	-33.3%	(12)	2	8.3%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	217	1.3	2070.0%	207	80	36.9%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	580	1.7	118.9%	315	62	10.7%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	264	0.5	-8.3%	(24)	(20)	-7.6%	11.7%
Education	6115	Technical and Trade Schools (Private)	24	0.4	100.0%	12	(2)	-8.3%	14.1%
Education	6116	Other Schools and Instruction (Private)	112	0.7	4.7%	5	(3)	-2.7%	16.8%
Education	6117	Educational Support Services (Private)	21	0.4	-53.3%	(24)	(1)	-4.8%	23.6%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	42	0.2	-16.0%	(8)	(11)	-26.2%	-14.0%
Electronics	3346	Mfg. and Reproducing Magnetic and Optical Media	26	2.3		26	0	0.0%	-13.1%
Electronics	3359	Other Electrical Equipment & Component Mfg.	21	0.4	-70.8%	(51)	2	9.5%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	38	0.3	-61.2%	(60)	(33)	-86.8%	-0.2%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	190	○ 0.5	-18.1%	(42)	11	5.8%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	33	◐ 0.7	26.9%	7	17	51.5%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	397	● 2.1	-8.3%	(36)	(9)	-2.3%	-3.7%
Energy	2212	Natural Gas Distribution	87	● 1.7	-23.0%	(26)	(62)	-71.3%	0.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	39	◐ 0.7	-29.1%	(16)	(4)	-10.3%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	73	● 1.6	-40.2%	(49)	(37)	-50.7%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	150	◐ 0.7	-15.7%	(28)	(46)	-30.7%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	314	◐ 1.4	19.8%	52	83	26.4%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	34	○ 0.2	-33.3%	(17)	(1)	-2.9%	5.9%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	51	◐ 1.3	-26.1%	(18)	(25)	-49.0%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	241	○ 0.4	-20.2%	(61)	45	18.7%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	11	○ 0.2	-47.6%	(10)	1	9.1%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	59	○ 0.3	5.4%	3	1	1.7%	3.0%
Finance	5221	Depository Credit Intermediation	541	◐ 0.6	-5.7%	(33)	(19)	-3.5%	3.4%
Finance	5222	Nondepository Credit Intermediation	126	○ 0.5	-10.0%	(14)	9	7.1%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	23	○ 0.2	-28.1%	(9)	(2)	-8.7%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	39	○ 0.2	11.4%	4	12	30.8%	3.1%
Finance	5239	Other Financial Investment Activities	71	○ 0.4	6.0%	4	13	18.3%	6.8%
Finance	5241	Insurance Carriers	113	○ 0.2	-0.9%	(1)	(67)	-59.3%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	250	◐ 0.6	-11.0%	(31)	67	26.8%	7.6%
Finance	5311	Lessors of Real Estate	368	◐ 1.3	-10.7%	(44)	90	24.5%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	108	◐ 0.8	-3.6%	(4)	9	8.3%	5.2%
Finance	5313	Activities Related to Real Estate	74	○ 0.3	15.6%	10	12	16.2%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	373	● 3.7	-31.4%	(171)	37	9.9%	-4.3%
Furniture	3379	Other Furniture Related Product Manufacturing	174	● 10.4	-42.8%	(130)	(75)	-43.1%	-6.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	26	◐ 0.6	-29.7%	(11)	(9)	-34.6%	1.6%
Government	5621	Waste Collection	53	◐ 0.7	26.2%	11	8	15.1%	8.7%
Government	5622	Waste Treatment and Disposal	71	● 1.5	-32.4%	(34)	(7)	-9.9%	10.4%
Government	9011	Federal Government, Civilian	439	○ 0.3	8.1%	33	12	2.7%	1.4%
Government	9012	Federal Government, Military	497	○ 0.5	-4.4%	(23)	3	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	889	◐ 0.6	-6.1%	(58)	(9)	-1.0%	4.3%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Government	9029	State Government, Excluding Education & Hospitals	500	○ 0.4	13.1%	58	(6)	-1.2%	3.8%
Government	9036	Education and Hospitals (Local Government)	4,257	◐ 1.0	-0.5%	(23)	272	6.4%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	3,377	◑ 1.3	4.2%	136	227	6.7%	4.8%
Healthcare	6211	Offices of Physicians	2,139	● 1.8	6.7%	135	535	25.0%	14.0%
Healthcare	6212	Offices of Dentists	526	◐ 1.3	14.1%	65	136	25.9%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	570	● 1.6	-7.5%	(46)	159	27.9%	17.6%
Healthcare	6214	Outpatient Care Centers	413	◐ 1.3	63.2%	160	111	26.9%	15.1%
Healthcare	6216	Home Health Care Services	439	◑ 0.8	19.3%	71	42	9.6%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	40	○ 0.3	185.7%	26	12	30.0%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	2,631	◐ 1.2	1.1%	29	315	12.0%	6.6%
Healthcare	6231	Nursing Care Facilities	1,050	◐ 1.3	1.5%	16	197	18.8%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	572	● 2.0	-1.5%	(9)	125	21.9%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	916	● 2.4	8.3%	70	113	12.3%	12.4%
Healthcare	6239	Other Residential Care Facilities	293	● 3.7	-24.3%	(94)	23	7.8%	8.8%
Healthcare	6241	Individual and Family Services	800	◐ 1.3	6.4%	48	273	34.1%	19.5%
Healthcare	6243	Vocational Rehabilitation Services	73	○ 0.4	-30.5%	(32)	(68)	-93.2%	10.1%
Healthcare	6244	Child Day Care Services	483	◐ 1.3	-0.8%	(4)	87	18.0%	8.7%
Industrial Machinery	3332	Industrial Machinery Manufacturing	238	● 5.0	-51.4%	(252)	(206)	-86.6%	-13.2%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	13	○ 0.2	-82.4%	(61)	2	15.4%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	230	● 3.0	-10.5%	(27)	32	13.9%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	102	● 2.2	92.5%	49	5	4.9%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	46	○ 0.4	-49.5%	(45)	(25)	-54.3%	-4.5%
Industrial Machinery	3353	Electrical Equipment Manufacturing	60	◐ 0.9	130.8%	34	1	1.7%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	52	○ 0.2	2.0%	1	(6)	-11.5%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	477	● 1.6	-27.9%	(185)	(85)	-17.8%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	330	● 2.3	16.6%	47	35	10.6%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	115	◐ 1.3	-42.2%	(84)	(35)	-30.4%	3.3%
Materials	3222	Converted Paper Product Manufacturing	165	◐ 1.3	10.7%	16	(74)	-44.8%	-10.3%
Materials	3251	Basic Chemical Manufacturing	224	● 3.4	46.4%	71	(44)	-19.6%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	165	● 3.9	-25.0%	(55)	(85)	-51.5%	-6.9%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	39	◐ 0.8	-13.3%	(6)	(4)	-10.3%	-3.2%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Materials	3259	Other Chemical Product & Prep. Mfg.	97	● 2.5	36.6%	26	15	15.5%	-7.6%
Materials	3261	Plastics Product Manufacturing	313	● 1.3	-31.5%	(144)	(60)	-19.2%	-4.9%
Materials	3262	Rubber Product Manufacturing	77	● 1.4	-32.5%	(37)	(22)	-28.6%	-8.6%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	35	○ 0.6	600.0%	30	7	20.0%	-2.6%
Metalworking	3321	Forging and Stamping	39	● 0.9	254.5%	28	11	28.2%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	191	● 10.5	-29.3%	(79)	(72)	-37.7%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	665	● 4.3	0.5%	3	76	11.4%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Mfg.	29	○ 0.7	480.0%	24	13	44.8%	-5.3%
Metalworking	3325	Hardware Manufacturing	17	● 1.6	-68.5%	(37)	(12)	-70.6%	-12.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	806	● 5.1	-4.8%	(41)	43	5.3%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	138	● 2.3	-25.0%	(46)	(34)	-24.6%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	90	○ 0.8	-26.2%	(32)	(12)	-13.3%	-5.4%
Non-Profits	8131	Religious Organizations	138	● 1.5	122.6%	76	39	28.3%	5.6%
Non-Profits	8134	Civic and Social Organizations	365	● 1.9	-18.3%	(82)	(1)	-0.3%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	48	○ 0.2	-28.4%	(19)	6	12.5%	6.6%
Professional Services	5411	Legal Services	215	○ 0.4	-17.3%	(45)	(10)	-4.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	241	○ 0.5	6.6%	15	23	9.5%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	260	○ 0.9	-3.3%	(9)	24	9.2%	8.5%
Professional Services	5511	Management of Companies and Enterprises	381	○ 0.4	7.9%	28	(62)	-16.3%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	473	○ 0.8	63.7%	184	245	51.8%	28.1%
Retail	4411	Automobile Dealers	782	● 1.6	-14.3%	(130)	85	10.9%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	41	○ 0.6	-61.0%	(64)	6	14.6%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	752	● 3.1	-1.7%	(13)	148	19.7%	1.0%
Retail	4421	Furniture Stores	57	○ 0.6	-40.6%	(39)	(22)	-38.6%	1.6%
Retail	4422	Home Furnishings Stores	77	○ 0.7	26.2%	16	29	37.7%	2.6%
Retail	4431	Electronics and Appliance Stores	228	○ 1.0	-12.0%	(31)	(4)	-1.8%	2.9%
Retail	4451	Grocery Stores	1,307	○ 1.1	1.3%	17	(29)	-2.2%	2.3%
Retail	4453	Beer, Wine, and Liquor Stores	10	○ 0.1	-56.5%	(13)	(5)	-50.0%	1.7%
Retail	4461	Health and Personal Care Stores	782	● 1.6	-3.1%	(25)	80	10.2%	6.6%
Retail	4471	Gasoline Stations	576	○ 1.5	-2.0%	(12)	10	1.7%	-2.3%
Retail	4481	Clothing Stores	342	○ 0.6	-25.7%	(118)	37	10.8%	3.6%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4482	Shoe Stores	92	1.0	-10.7%	(11)	(2)	-2.2%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	49	0.7	-32.9%	(24)	(10)	-20.4%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	357	1.6	27.0%	76	18	5.0%	4.9%
Retail	4512	Book, Periodical, and Music Stores	27	0.4	-81.0%	(115)	(11)	-40.7%	-10.2%
Retail	4521	Department Stores	680	0.9	-21.1%	(182)	(179)	-26.3%	-3.3%
Retail	4529	Other General Merchandise Stores	1,958	2.6	23.5%	372	523	26.7%	15.1%
Retail	4531	Florists	29	0.9	-23.7%	(9)	(6)	-20.7%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	121	0.8	-13.6%	(19)	8	6.6%	-7.1%
Retail	4533	Used Merchandise Stores	91	1.4	-17.3%	(19)	(27)	-29.7%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	109	0.8	28.2%	24	9	8.3%	2.2%
Retail	4543	Direct Selling Establishments	53	0.9	-5.4%	(3)	(10)	-18.9%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	33	0.4	-2.9%	(1)	20	60.6%	2.5%
Retail	5322	Consumer Goods Rental	172	2.0	-5.5%	(10)	26	15.1%	-1.0%
Retail	5323	General Rental Centers	25	1.3	-50.0%	(25)	(2)	-8.0%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	15	0.3	36.4%	4	5	33.3%	0.9%
Retail	8111	Automotive Repair and Maintenance	452	1.2	2.5%	11	19	4.2%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	52	1.6	33.3%	13	8	15.4%	-2.2%
Retail	8121	Personal Care Services	262	0.9	1.6%	4	67	25.6%	11.4%
Retail	8122	Death Care Services	164	2.6	-4.1%	(7)	7	4.3%	1.2%
Retail	8123	Drycleaning and Laundry Services	121	0.8	-25.3%	(41)	(34)	-28.1%	-0.8%
Retail	8129	Other Personal Services	31	0.3	138.5%	18	8	25.8%	6.0%
Retail	8141	Private Households	81	0.3	9.5%	7	2	2.5%	13.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	87	0.1	-28.1%	(34)	10	11.5%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	169	0.6	44.4%	52	(38)	-22.5%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	64	0.8	36.2%	17	8	12.5%	5.1%
Transportation & Logistics	4821	Rail Transportation	30	0.3	-25.0%	(10)	(1)	-3.3%	0.3%
Transportation & Logistics	4841	General Freight Trucking	111	0.3	-51.1%	(116)	1	0.9%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	30	0.2	-57.1%	(40)	4	13.3%	4.9%
Transportation & Logistics	4854	School and Employee Bus Transportation	10	0.1		10	5	50.0%	7.4%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	26	0.6	420.0%	21	11	42.3%	10.6%
Transportation & Logistics	4884	Support Activities for Road Transportation	165	3.9	11.5%	17	32	19.4%	11.1%

Gaston County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4885	Freight Transportation Arrangement	30	○ 0.3	-43.4%	(23)	0	0.0%	4.4%
Transportation & Logistics	4921	Couriers and Express Delivery Services	148	◐ 0.7	-30.2%	(64)	14	9.5%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	13	◐ 0.6	160.0%	8	11	84.6%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	135	○ 0.4	-69.5%	(308)	(4)	-3.0%	7.6%
Total	10	Total	64,501	● 1.0	-8.8%	(6,217)	3,668	5.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	28	○ 0.1	16.7%	4	4	14.3%	-1.2%
Agribusiness & Food	1120	Animal Production	307	● 2.8	13.3%	36	(16)	-5.2%	-1.5%
Agribusiness & Food	1152	Support Activities for Animal Production	13	● 1.0	-18.8%	(3)	0	0.0%	10.0%
Agribusiness & Food	3111	Animal Food Manufacturing	122	● 4.9	-15.3%	(22)	(29)	-23.8%	-1.6%
Agribusiness & Food	3112	Grain and Oilseed Milling	103	● 3.7	0.0%	0	(18)	-17.5%	-1.9%
Agribusiness & Food	3113	Sugar and Confectionery Product Manufacturing	182	● 5.9	-20.5%	(47)	(20)	-11.0%	-4.3%
Agribusiness & Food	3116	Animal Slaughtering and Processing	127	● 0.5	25.7%	26	15	11.8%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	52	● 0.4	246.7%	37	1	1.9%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	12	○ 0.2	140.0%	7	2	16.7%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	173	● 2.1	68.0%	70	54	31.2%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	132	● 0.4	-0.8%	(1)	56	42.4%	6.4%
Agribusiness & Food	4245	Farm Product Raw Material Merchant Wholesalers	24	● 0.7	-51.0%	(25)	(3)	-12.5%	-4.1%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	69	● 5.8	-66.5%	(137)	(64)	-92.8%	-26.5%
Apparel & Textiles	3132	Fabric Mills	546	● 24.1	-27.4%	(206)	219	40.1%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	79	● 5.3	-73.3%	(217)	(74)	-93.7%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	29	● 1.2	-76.2%	(93)	(24)	-82.8%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	174	● 6.3	51.3%	59	89	51.1%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	134	● 21.0	-30.9%	(60)	(32)	-23.9%	-52.1%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	63	● 1.2	-61.1%	(99)	24	38.1%	-33.6%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	16	○ 0.2	-51.5%	(17)	3	18.8%	-3.0%
Automotive	3363	Motor Vehicle Parts Manufacturing	626	● 3.2	-9.5%	(66)	(58)	-9.3%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	252	● 15.2	5.4%	13	72	28.6%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	756	● 5.0	-1.9%	(15)	218	28.8%	0.3%
Back Office	5611	Office Administrative Services	159	● 0.8	133.8%	91	28	17.6%	12.4%
Back Office	5613	Employment Services	2,010	● 1.5	14.7%	257	373	18.6%	6.0%
Back Office	5614	Business Support Services	64	○ 0.2	45.5%	20	17	26.6%	9.4%
Back Office	5616	Investigation and Security Services	341	● 0.9	-4.7%	(17)	(11)	-3.2%	9.9%
Back Office	5617	Services to Buildings and Dwellings	504	● 0.6	-6.5%	(35)	49	9.7%	9.8%
Back Office	5619	Other Support Services	342	● 2.5	47.4%	110	164	48.0%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	184	● 1.2	-14.8%	(32)	(86)	-46.7%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	85	● 0.9	18.1%	13	48	56.5%	9.6%

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	33	○ 0.3	106.3%	17	13	39.4%	16.3%
Building & Construction	2361	Residential Building Construction	363	● 1.3	-15.6%	(67)	165	45.5%	6.4%
Building & Construction	2362	Nonresidential Building Construction	231	● 0.7	-31.9%	(108)	26	11.3%	6.1%
Building & Construction	2371	Utility System Construction	281	● 1.5	44.1%	86	24	8.5%	4.6%
Building & Construction	2372	Land Subdivision	12	● 0.5	-71.4%	(30)	(7)	-58.3%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	134	● 1.0	-5.0%	(7)	50	37.3%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	43	● 0.9	-72.1%	(111)	(22)	-51.2%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	742	● 2.3	-11.6%	(97)	144	19.4%	4.7%
Building & Construction	2382	Building Equipment Contractors	945	● 1.2	-30.5%	(414)	148	15.7%	8.5%
Building & Construction	2383	Building Finishing Contractors	193	● 0.7	-47.6%	(175)	26	13.5%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	344	● 1.3	-21.5%	(94)	61	17.7%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	20	● 0.5	-72.6%	(53)	(15)	-75.0%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	227	● 2.6	-48.9%	(217)	34	15.0%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	57	● 3.1	-49.1%	(55)	(26)	-45.6%	-7.3%
Building & Construction	3272	Glass and Glass Product Manufacturing	319	● 9.0	-0.9%	(3)	50	15.7%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	163	● 2.1	0.6%	1	39	23.9%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	83	● 2.7	69.4%	34	22	26.5%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	164	● 1.8	-44.0%	(129)	(23)	-14.0%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	90	● 0.8	-11.8%	(12)	21	23.3%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	834	● 1.7	-8.5%	(77)	141	16.9%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	98	● 1.6	3.2%	3	16	16.3%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	72	● 0.6	-60.0%	(108)	(38)	-52.8%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	331	● 2.1	1.5%	5	81	24.5%	-0.4%
Culture & Entertainment	4871	Scenic and Sightseeing Transportation, Land	16	● 3.1	-59.0%	(23)	4	25.0%	11.3%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	18	○ 0.2	20.0%	3	(3)	-16.7%	1.3%
Culture & Entertainment	7112	Spectator Sports	1,271	● 21.2	-28.0%	(494)	275	21.6%	7.3%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	631	● 1.2	58.1%	232	158	25.0%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	627	● 0.8	-2.2%	(14)	80	12.8%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	2,924	● 1.3	1.5%	43	171	5.8%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	2,626	● 1.3	2.2%	56	239	9.1%	6.5%
Culture & Entertainment	7223	Special Food Services	35	○ 0.1	6.1%	2	4	11.4%	4.3%

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	74	● 0.4	252.4%	53	36	48.6%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	275	● 0.8	60.8%	104	32	11.6%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	11	○ 0.0	120.0%	6	8	72.7%	11.7%
Education	6115	Technical and Trade Schools (Private)	175	● 2.7	19.9%	29	17	9.7%	14.1%
Education	6116	Other Schools and Instruction (Private)	151	● 0.9	17.1%	22	48	31.8%	16.8%
Education	6117	Educational Support Services (Private)	11	○ 0.2	10.0%	1	0	0.0%	23.6%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	65	● 0.4	16.1%	9	(60)	-92.3%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	81	● 0.4	-31.4%	(37)	15	18.5%	-0.4%
Electronics	3359	Other Electrical Equipment & Component Mfg.	44	● 0.8	-10.2%	(5)	19	43.2%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	53	● 0.4	-34.6%	(28)	4	7.5%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	394	● 1.0	-4.4%	(18)	35	8.9%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	81	● 1.8	107.7%	42	49	60.5%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	44	○ 0.2	120.0%	24	2	4.5%	-3.7%
Energy	2212	Natural Gas Distribution	105	● 2.0	66.7%	42	28	26.7%	0.7%
Energy	3241	Petroleum and Coal Products Manufacturing	115	● 2.2		115	50	43.5%	-4.5%
Energy	4235	Metal and Mineral Merchant Wholesalers	21	● 0.4	-67.7%	(44)	(8)	-38.1%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	48	● 1.1	-26.2%	(17)	3	6.3%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	94	● 0.4	17.5%	14	31	33.0%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	52	○ 0.2	-34.2%	(27)	10	19.2%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	187	● 1.1	107.8%	97	(16)	-8.6%	5.9%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	17	● 0.4	240.0%	12	5	29.4%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	306	● 0.5	-16.8%	(62)	41	13.4%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	18	○ 0.3	-18.2%	(4)	1	5.6%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	77	● 0.4	196.2%	51	25	32.5%	3.0%
Finance	5221	Depository Credit Intermediation	566	● 0.7	9.5%	49	98	17.3%	3.4%
Finance	5222	Nondepository Credit Intermediation	99	● 0.4	-28.8%	(40)	9	9.1%	-2.5%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	45	○ 0.2	25.0%	9	12	26.7%	3.1%
Finance	5239	Other Financial Investment Activities	48	○ 0.3	50.0%	16	12	25.0%	6.8%
Finance	5241	Insurance Carriers	49	○ 0.1	28.9%	11	3	6.1%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	278	● 0.7	1.1%	3	43	15.5%	7.6%
Finance	5259	Other Investment Pools and Funds	12	● 0.6		12	3	25.0%	5.1%

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5311	Lessors of Real Estate	132	● 0.5	-11.4%	(17)	22	16.7%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	103	● 0.8	-42.8%	(77)	8	7.8%	5.2%
Finance	5313	Activities Related to Real Estate	72	○ 0.3	24.1%	14	16	22.2%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	150	● 1.5	-55.1%	(184)	(96)	-64.0%	-4.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	23	● 0.5	-80.8%	(97)	(12)	-52.2%	1.6%
Government	5621	Waste Collection	61	● 0.9	-37.8%	(37)	(5)	-8.2%	8.7%
Government	5622	Waste Treatment and Disposal	22	● 0.5	-8.3%	(2)	0	0.0%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	93	● 1.5	1760.0%	88	22	23.7%	8.6%
Government	9011	Federal Government, Civilian	300	○ 0.2	3.8%	11	11	3.7%	1.4%
Government	9012	Federal Government, Military	406	● 0.4	4.4%	17	3	0.7%	0.8%
Government	9026	Education and Hospitals (State Government)	606	● 0.4	5.2%	30	10	1.7%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	447	● 0.4	-3.0%	(14)	10	2.2%	3.8%
Government	9036	Education and Hospitals (Local Government)	4,937	● 1.2	-9.8%	(535)	433	8.8%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	2,145	● 0.8	12.4%	236	221	10.3%	4.8%
Healthcare	6211	Offices of Physicians	1,617	● 1.4	31.7%	389	473	29.3%	14.0%
Healthcare	6212	Offices of Dentists	436	● 1.0	26.7%	92	126	28.9%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	277	● 0.8	-11.2%	(35)	52	18.8%	17.6%
Healthcare	6214	Outpatient Care Centers	331	● 1.1	11.8%	35	90	27.2%	15.1%
Healthcare	6216	Home Health Care Services	521	● 0.9	-6.0%	(33)	83	15.9%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	65	● 0.5	124.1%	36	1	1.5%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	1,326	● 0.6	-8.9%	(130)	291	21.9%	6.6%
Healthcare	6231	Nursing Care Facilities	670	● 0.8	4.9%	31	89	13.3%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	341	● 1.2	-6.1%	(22)	76	22.3%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	527	● 1.4	8.2%	40	57	10.8%	12.4%
Healthcare	6241	Individual and Family Services	617	● 1.0	12.0%	66	214	34.7%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	102	● 1.4	126.7%	57	21	20.6%	9.9%
Healthcare	6244	Child Day Care Services	443	● 1.2	-0.7%	(3)	63	14.2%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	75	● 0.7	1400.0%	70	(15)	-20.0%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	730	● 15.5	1.8%	13	98	13.4%	-13.2%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	56	● 1.3	55.6%	20	1	1.8%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	104	● 1.7	-48.8%	(99)	(57)	-54.8%	-9.8%

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	3335	Metalworking Machinery Manufacturing	144	● 1.9	22.0%	26	23	16.0%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	65	● 1.4	-47.6%	(59)	2	3.1%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	182	● 1.7	-19.8%	(45)	(10)	-5.5%	-4.5%
Industrial Machinery	3353	Electrical Equipment Manufacturing	316	● 5.0	-43.7%	(245)	(194)	-61.4%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	45	○ 0.2	-60.9%	(70)	(14)	-31.1%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	476	● 1.6	-15.9%	(90)	41	8.6%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	182	● 1.3	-33.6%	(92)	(19)	-10.4%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	133	● 1.5	-16.9%	(27)	2	1.5%	3.3%
Logging & Metal/Mineral Mii	1133	Logging	40	● 1.8	-11.1%	(5)	8	20.0%	-4.2%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	25	● 0.6	-3.8%	(1)	15	60.0%	-2.9%
Materials	3221	Pulp, Paper, and Paperboard Mills	356	● 7.2	-17.2%	(74)	(114)	-32.0%	-18.9%
Materials	3222	Converted Paper Product Manufacturing	470	● 3.6	-12.0%	(64)	(31)	-6.6%	-10.3%
Materials	3251	Basic Chemical Manufacturing	52	● 0.8	44.4%	16	11	21.2%	-11.0%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	108	● 4.1	-47.1%	(96)	(2)	-1.9%	-1.0%
Materials	3261	Plastics Product Manufacturing	721	● 3.1	-28.6%	(289)	(76)	-10.5%	-4.9%
Materials	3262	Rubber Product Manufacturing	13	○ 0.2	-45.8%	(11)	7	53.8%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	16	○ 0.3	-20.0%	(4)	17	106.3%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	131	● 2.3	-35.5%	(72)	1	0.8%	-2.6%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	321	● 7.9	-22.3%	(92)	50	15.6%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	171	● 6.4	-10.0%	(19)	(17)	-9.9%	-4.0%
Metalworking	3321	Forging and Stamping	162	● 3.8	1.3%	2	(17)	-10.5%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	11	● 0.6	120.0%	6	7	63.6%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	224	● 1.4	2.8%	6	58	25.9%	1.9%
Metalworking	3325	Hardware Manufacturing	154	● 14.6	-56.7%	(202)	(58)	-37.7%	-12.1%
Metalworking	3326	Spring and Wire Product Manufacturing	11	● 0.6	-88.4%	(84)	(6)	-54.5%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	242	● 1.5	-20.4%	(62)	40	16.5%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	13	○ 0.2	-81.7%	(58)	(8)	-61.5%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	18	○ 0.2	-25.0%	(6)	(13)	-72.2%	-5.4%
Non-Profits	8131	Religious Organizations	19	○ 0.2	280.0%	14	7	36.8%	5.6%
Non-Profits	8134	Civic and Social Organizations	176	● 0.9	-55.3%	(218)	(39)	-22.2%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	33	○ 0.2	-5.7%	(2)	15	45.5%	6.6%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Professional Services	5411	Legal Services	277	● 0.5	13.5%	33	33	11.9%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	255	● 0.6	-31.5%	(117)	(3)	-1.2%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	237	● 0.8	-3.3%	(8)	41	17.3%	8.5%
Professional Services	5511	Management of Companies and Enterprises	3,872	● 4.2	82.1%	1,746	1,269	32.8%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	343	● 0.6	-25.4%	(117)	71	20.7%	28.1%
Research	5417	Scientific Research and Development Services	10	○ 0.0	-37.5%	(6)	0	0.0%	9.8%
Retail	4411	Automobile Dealers	596	● 1.2	-20.6%	(155)	25	4.2%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	153	● 2.4	-40.2%	(103)	39	25.5%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	398	● 1.7	-12.3%	(56)	22	5.5%	1.0%
Retail	4421	Furniture Stores	33	● 0.3	-62.9%	(56)	(28)	-84.8%	1.6%
Retail	4422	Home Furnishings Stores	36	● 0.3	-41.0%	(25)	(7)	-19.4%	2.6%
Retail	4431	Electronics and Appliance Stores	225	● 1.0	106.4%	116	57	25.3%	2.9%
Retail	4451	Grocery Stores	1,149	● 1.0	32.2%	280	1	0.1%	2.3%
Retail	4452	Specialty Food Stores	48	● 0.5	-39.2%	(31)	(15)	-31.3%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	14	○ 0.2	180.0%	9	(2)	-14.3%	1.7%
Retail	4461	Health and Personal Care Stores	619	● 1.3	7.5%	43	63	10.2%	6.6%
Retail	4471	Gasoline Stations	570	● 1.5	-3.1%	(18)	42	7.4%	-2.3%
Retail	4481	Clothing Stores	195	● 0.4	-25.6%	(67)	13	6.7%	3.6%
Retail	4482	Shoe Stores	55	● 0.6	-12.7%	(8)	(2)	-3.6%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	36	● 0.5	-14.3%	(6)	(11)	-30.6%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	220	● 1.0	4.3%	9	27	12.3%	4.9%
Retail	4512	Book, Periodical, and Music Stores	10	○ 0.2	-33.3%	(5)	(5)	-50.0%	-10.2%
Retail	4521	Department Stores	794	● 1.1	-15.3%	(143)	(132)	-16.6%	-3.3%
Retail	4529	Other General Merchandise Stores	1,514	● 2.0	5.4%	78	235	15.5%	15.1%
Retail	4531	Florists	31	● 1.0	-36.7%	(18)	(5)	-16.1%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	153	● 1.1	-8.9%	(15)	(7)	-4.6%	-7.1%
Retail	4533	Used Merchandise Stores	121	● 1.9	1.7%	2	6	5.0%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	260	● 2.0	-2.6%	(7)	(48)	-18.5%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	23	○ 0.2	91.7%	11	4	17.4%	6.3%
Retail	4543	Direct Selling Establishments	37	● 0.6	-9.8%	(4)	(9)	-24.3%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	59	● 0.7	40.5%	17	19	32.2%	2.5%

Iredell County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	5322	Consumer Goods Rental	111	● 1.3	-17.2%	(23)	(5)	-4.5%	-1.0%
Retail	5323	General Rental Centers	36	● 1.9	-37.9%	(22)	15	41.7%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental and Leasing	79	● 1.4	1.3%	1	(3)	-3.8%	0.9%
Retail	8111	Automotive Repair and Maintenance	495	● 1.3	16.2%	69	119	24.0%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	20	● 0.6	25.0%	4	5	25.0%	-2.2%
Retail	8121	Personal Care Services	254	● 0.8	-19.6%	(62)	54	21.3%	11.4%
Retail	8122	Death Care Services	67	● 1.1	-10.7%	(8)	3	4.5%	1.2%
Retail	8123	Drycleaning and Laundry Services	180	● 1.3	-16.3%	(35)	(11)	-6.1%	-0.8%
Retail	8129	Other Personal Services	34	○ 0.3	-20.9%	(9)	(2)	-5.9%	6.0%
Retail	8141	Private Households	56	○ 0.2	-27.3%	(21)	(16)	-28.6%	13.6%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	23	○ 0.2	360.0%	18	15	65.2%	15.6%
Software / Info. Tech.	5191	Other Information Services	23	○ 0.3	360.0%	18	8	34.8%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	167	○ 0.2	13.6%	20	27	16.2%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	139	● 0.5	13.9%	17	58	41.7%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	47	● 0.6	23.7%	9	14	29.8%	5.1%
Transportation & Logistics	4812	Nonscheduled Air Transportation	20	● 1.0	42.9%	6	(4)	-20.0%	7.0%
Transportation & Logistics	4821	Rail Transportation	24	○ 0.2	-36.8%	(14)	(5)	-20.8%	0.3%
Transportation & Logistics	4841	General Freight Trucking	1,414	● 3.3	-1.9%	(27)	121	8.6%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	83	● 0.4	-34.1%	(43)	(12)	-14.5%	4.9%
Transportation & Logistics	4853	Taxi and Limousine Service	21	● 0.6	31.3%	5	0	0.0%	1.7%
Transportation & Logistics	4881	Support Activities for Air Transportation	16	○ 0.2	-33.3%	(8)	6	37.5%	10.7%
Transportation & Logistics	4884	Support Activities for Road Transportation	19	● 0.5	5.6%	1	5	26.3%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	26	○ 0.3	18.2%	4	7	26.9%	4.4%
Transportation & Logistics	4921	Couriers and Express Delivery Services	116	● 0.5	123.1%	64	6	5.2%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	13	● 0.6	160.0%	8	2	15.4%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	254	● 0.8	29.6%	58	80	31.5%	7.6%
Total	10	Total	64,209	● 1.0	-4.3%	(2,914)	7,534	11.7%	5.2%

Source: Avalanche Consulting using data from EMSI

Lincoln County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	26	○ 0.3	420.0%	21	5	19.2%	-1.2%
Agribusiness & Food	1120	Animal Production	23	◐ 0.7	130.0%	13	(4)	-17.4%	-1.5%
Agribusiness & Food	1151	Support Activities for Crop Production	15	○ 0.3	-11.8%	(2)	2	13.3%	4.2%
Agribusiness & Food	3116	Animal Slaughtering and Processing	18	○ 0.2	-51.4%	(19)	3	16.7%	2.3%
Agribusiness & Food	3119	Other Food Manufacturing	46	● 1.8	820.0%	41	15	32.6%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	27	● 1.0	440.0%	22	13	48.1%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	29	○ 0.3	480.0%	24	16	55.2%	6.4%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	46	● 12.4	-74.7%	(136)	(41)	-89.1%	-26.5%
Apparel & Textiles	3132	Fabric Mills	333	● 46.7	-32.2%	(158)	(22)	-6.6%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	94	● 20.1	-67.7%	(197)	(94)	-100.0%	-33.5%
Apparel & Textiles	3149	Other Textile Product Mills	19	● 2.2	-17.4%	(4)	(14)	-73.7%	-6.4%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	32	● 1.9	540.0%	27	(27)	-84.4%	-33.6%
Automotive	3363	Motor Vehicle Parts Manufacturing	165	● 2.7	19.6%	27	167	101.2%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	67	● 1.4	294.1%	50	9	13.4%	0.3%
Back Office	5611	Office Administrative Services	16	○ 0.2	220.0%	11	5	31.3%	12.4%
Back Office	5613	Employment Services	255	◐ 0.6	-64.3%	(460)	(127)	-49.8%	6.0%
Back Office	5614	Business Support Services	16	○ 0.1	33.3%	4	2	12.5%	9.4%
Back Office	5616	Investigation and Security Services	35	○ 0.3	6.1%	2	(13)	-37.1%	9.9%
Back Office	5617	Services to Buildings and Dwellings	372	● 1.4	23.2%	70	135	36.3%	9.8%
Back Office	5619	Other Support Services	104	● 2.5	235.5%	73	57	54.8%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	205	● 4.8	7.9%	15	59	28.8%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	18	○ 0.4	0.0%	0	7	38.9%	3.8%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	16	○ 0.4	220.0%	11	10	62.5%	16.3%
Building & Construction	2213	Water, Sewage and Other Systems	77	● 10.4	60.4%	29	19	24.7%	9.4%
Building & Construction	2361	Residential Building Construction	90	● 1.0	-60.2%	(136)	(40)	-44.4%	6.4%
Building & Construction	2362	Nonresidential Building Construction	79	◐ 0.8	31.7%	19	48	60.8%	6.1%
Building & Construction	2371	Utility System Construction	164	● 2.8	-46.2%	(141)	(29)	-17.7%	4.6%
Building & Construction	2372	Land Subdivision	21	● 3.0	320.0%	16	9	42.9%	-4.2%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	360	● 3.6	-23.2%	(109)	156	43.3%	4.7%
Building & Construction	2382	Building Equipment Contractors	485	● 1.9	-33.0%	(239)	146	30.1%	8.5%
Building & Construction	2383	Building Finishing Contractors	286	● 3.1	52.9%	99	293	102.4%	6.0%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2389	Other Specialty Trade Contractors	110	● 1.4	-25.7%	(38)	28	25.5%	7.7%
Building & Construction	3219	Other Wood Product Manufacturing	85	● 3.1	-78.1%	(303)	(80)	-94.1%	-6.4%
Building & Construction	3273	Cement and Concrete Product Manufacturing	63	● 2.5	-74.3%	(182)	(14)	-22.2%	3.7%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	37	● 1.3	640.0%	32	12	32.4%	4.0%
Building & Construction	4441	Building Material and Supplies Dealers	340	● 2.2	2.4%	8	80	23.5%	4.9%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	34	◐ 0.9	3.0%	1	(1)	-2.9%	1.1%
Culture & Entertainment	7112	Spectator Sports	52	● 2.8	205.9%	35	25	48.1%	7.3%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	300	● 1.8	80.7%	134	61	20.3%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	20	○ 0.1	-47.4%	(18)	0	0.0%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	643	◐ 0.9	-8.3%	(58)	40	6.2%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	1,149	● 1.8	20.3%	194	178	15.5%	6.5%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	20	○ 0.4	300.0%	15	4	20.0%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	149	● 1.4	62.0%	57	34	22.8%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	17	○ 0.1		17	11	64.7%	11.7%
Education	6116	Other Schools and Instruction (Private)	34	◐ 0.7	142.9%	20	9	26.5%	16.8%
Education	6117	Educational Support Services (Private)	18	◐ 1.0		18	(1)	-5.6%	23.6%
Electronics	3342	Communications Equipment Manufacturing	83	● 5.2		83	(22)	-26.5%	-8.5%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	180	● 1.4	25.0%	36	33	18.3%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	12	◐ 0.8	-36.8%	(7)	5	41.7%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	49	◐ 0.8	-40.2%	(33)	(22)	-44.9%	-3.7%
Energy	4247	Petroleum and Petroleum Products Wholesalers	21	● 1.5	-69.1%	(47)	10	47.6%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	16	○ 0.2	-11.1%	(2)	4	25.0%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	37	◐ 0.5	-36.2%	(21)	(2)	-5.4%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	17	○ 0.3	-45.2%	(14)	0	0.0%	5.9%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	31	● 2.5		31	30	96.8%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	71	○ 0.4	-36.6%	(41)	9	12.7%	8.0%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	15	○ 0.2	-42.3%	(11)	(2)	-13.3%	3.0%
Finance	5221	Depository Credit Intermediation	246	◐ 0.9	-5.4%	(14)	31	12.6%	3.4%
Finance	5222	Nondepository Credit Intermediation	68	◐ 0.8	-20.9%	(18)	27	39.7%	-2.5%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	47	○ 0.4	14.6%	6	4	8.5%	7.6%
Finance	5311	Lessors of Real Estate	21	○ 0.2	40.0%	6	7	33.3%	1.6%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5313	Activities Related to Real Estate	19	○ 0.2	-13.6%	(3)	2	10.5%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	662	● 21.3	-48.9%	(634)	121	18.3%	-4.3%
Furniture	3372	Office Furniture Manufacturing	23	● 1.7	-66.7%	(46)	(18)	-78.3%	-5.8%
Government	5621	Waste Collection	19	◐ 0.9	35.7%	5	0	0.0%	8.7%
Government	5629	Remediation & Other Waste Management Svcs.	25	● 1.3	-34.2%	(13)	(7)	-28.0%	8.6%
Government	9011	Federal Government, Civilian	120	○ 0.3	7.1%	8	5	4.2%	1.4%
Government	9012	Federal Government, Military	192	◐ 0.6	2.7%	5	1	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	99	○ 0.2	86.8%	46	3	3.0%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	178	◐ 0.5	6.0%	10	5	2.8%	3.8%
Government	9036	Education and Hospitals (Local Government)	2,266	● 1.7	-5.6%	(135)	215	9.5%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	1,071	● 1.3	6.9%	69	118	11.0%	4.8%
Healthcare	6211	Offices of Physicians	232	◐ 0.6	20.2%	39	65	28.0%	14.0%
Healthcare	6212	Offices of Dentists	163	● 1.2	22.6%	30	49	30.1%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	85	◐ 0.8	54.5%	30	31	36.5%	17.6%
Healthcare	6214	Outpatient Care Centers	30	○ 0.3	20.0%	5	11	36.7%	15.1%
Healthcare	6216	Home Health Care Services	21	○ 0.1	-8.7%	(2)	2	9.5%	19.8%
Healthcare	6231	Nursing Care Facilities	365	● 1.4	-1.6%	(6)	61	16.7%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	38	○ 0.4	-29.6%	(16)	6	15.8%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	131	● 1.1	23.6%	25	(3)	-2.3%	12.4%
Healthcare	6239	Other Residential Care Facilities	14	◐ 0.6	180.0%	9	5	35.7%	8.8%
Healthcare	6241	Individual and Family Services	45	○ 0.2	-6.3%	(3)	4	8.9%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	38	● 1.7	216.7%	26	22	57.9%	9.9%
Healthcare	6244	Child Day Care Services	123	● 1.0	-1.6%	(2)	2	1.6%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	177	● 5.4	-41.4%	(125)	1	0.6%	-0.9%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	19	● 1.4	280.0%	14	12	63.2%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	15	◐ 0.8	200.0%	10	1	6.7%	-9.8%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	29	● 2.0		29	5	17.2%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	37	● 1.1	19.4%	6	(12)	-32.4%	-4.5%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	52	◐ 0.6	-32.5%	(25)	(2)	-3.8%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	31	◐ 0.7	-13.9%	(5)	14	45.2%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	13	○ 0.5	160.0%	8	4	30.8%	3.3%

Lincoln County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Logging & Metal/Mineral Mii	1133	Logging	11	● 1.6	-15.4%	(2)	(6)	-54.5%	-4.2%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	60	● 4.6	25.0%	12	13	21.7%	-2.9%
Materials	3222	Converted Paper Product Manufacturing	59	● 1.4	3.5%	2	(19)	-32.2%	-10.3%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	122	● 9.3	190.5%	80	4	3.3%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	60	● 7.2	1100.0%	55	15	25.0%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	37	● 2.5	640.0%	32	21	56.8%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	100	● 8.2	-19.4%	(24)	(32)	-32.0%	-7.6%
Materials	3261	Plastics Product Manufacturing	136	● 1.8	-1.4%	(2)	39	28.7%	-4.9%
Materials	4241	Paper and Paper Product Merchant Wholesalers	13	◐ 0.7	-66.7%	(26)	2	15.4%	-5.2%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	95	● 7.5	1800.0%	90	49	51.6%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	66	● 7.8		66	32	48.5%	-4.0%
Metalworking	3323	Architectural and Structural Metals Manufacturing	57	● 1.2	23.9%	11	22	38.6%	1.9%
Metalworking	3325	Hardware Manufacturing	246	● 74.1	215.4%	168	212	86.2%	-12.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	52	● 1.1	18.2%	8	2	3.8%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	118	● 6.3	51.3%	40	56	47.5%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	904	● 24.2	-44.1%	(713)	(135)	-14.9%	-5.4%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	22	○ 0.3	15.8%	3	13	59.1%	6.6%
Professional Services	5411	Legal Services	72	○ 0.4	12.5%	8	7	9.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	59	○ 0.4	-24.4%	(19)	4	6.8%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	141	● 1.5	33.0%	35	20	14.2%	8.5%
Professional Services	5511	Management of Companies and Enterprises	37	○ 0.1	-19.6%	(9)	(32)	-86.5%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	151	◐ 0.9	297.4%	113	65	43.0%	28.1%
Retail	4411	Automobile Dealers	84	◐ 0.5	-50.6%	(86)	(40)	-47.6%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	22	● 1.1	-48.8%	(21)	(3)	-13.6%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	182	● 2.4	-9.0%	(18)	22	12.1%	1.0%
Retail	4421	Furniture Stores	43	● 1.3	16.2%	6	17	39.5%	1.6%
Retail	4422	Home Furnishings Stores	40	● 1.2	207.7%	27	18	45.0%	2.6%
Retail	4431	Electronics and Appliance Stores	11	○ 0.2	-45.0%	(9)	(6)	-54.5%	2.9%
Retail	4451	Grocery Stores	537	● 1.4	-1.3%	(7)	(14)	-2.6%	2.3%
Retail	4461	Health and Personal Care Stores	274	● 1.8	6.2%	16	40	14.6%	6.6%
Retail	4471	Gasoline Stations	220	● 1.8	-7.6%	(18)	13	5.9%	-2.3%

Lincoln County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4481	Clothing Stores	42	○ 0.2	75.0%	18	10	23.8%	3.6%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	16	◐ 0.8	220.0%	11	2	12.5%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	17	○ 0.2	-37.0%	(10)	(3)	-17.6%	4.9%
Retail	4521	Department Stores	254	● 1.1	14.9%	33	33	13.0%	-3.3%
Retail	4529	Other General Merchandise Stores	583	● 2.5	194.4%	385	192	32.9%	15.1%
Retail	4531	Florists	15	● 1.5	-6.3%	(1)	2	13.3%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	39	◐ 0.9	-2.5%	(1)	(7)	-17.9%	-7.1%
Retail	4533	Used Merchandise Stores	28	● 1.4	180.0%	18	0	0.0%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	51	● 1.2	168.4%	32	8	15.7%	2.2%
Retail	4543	Direct Selling Establishments	14	◐ 0.7	-44.0%	(11)	(2)	-14.3%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	11	○ 0.4	-47.6%	(10)	2	18.2%	2.5%
Retail	5322	Consumer Goods Rental	18	◐ 0.7	-60.0%	(27)	(7)	-38.9%	-1.0%
Retail	5323	General Rental Centers	11	● 1.9	120.0%	6	7	63.6%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	10	◐ 0.6	100.0%	5	(5)	-50.0%	0.9%
Retail	8111	Automotive Repair and Maintenance	194	● 1.6	10.2%	18	59	30.4%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	24	● 2.4	-36.8%	(14)	(7)	-29.2%	-2.2%
Retail	8121	Personal Care Services	55	◐ 0.6	-35.3%	(30)	(2)	-3.6%	11.4%
Retail	8122	Death Care Services	26	● 1.3	-13.3%	(4)	(4)	-15.4%	1.2%
Retail	8123	Drycleaning and Laundry Services	45	● 1.0	7.1%	3	(1)	-2.2%	-0.8%
Retail	8129	Other Personal Services	28	◐ 0.7	-48.1%	(26)	(4)	-14.3%	6.0%
Retail	8141	Private Households	15	○ 0.1	-34.8%	(8)	(3)	-20.0%	13.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	42	○ 0.2	281.8%	31	10	23.8%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	51	◐ 0.6	-7.3%	(4)	2	3.9%	-4.0%
Telecom Services	5179	Other Telecommunications	11	◐ 0.7	120.0%	6	10	90.9%	-4.3%
Transportation & Logistics	4821	Rail Transportation	15	○ 0.4	-6.3%	(1)	1	6.7%	0.3%
Transportation & Logistics	4841	General Freight Trucking	185	● 1.4	-21.9%	(52)	16	8.6%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	13	○ 0.2	-59.4%	(19)	(8)	-61.5%	4.9%
Transportation & Logistics	4881	Support Activities for Air Transportation	13	◐ 0.5	160.0%	8	2	15.4%	10.7%
Transportation & Logistics	4884	Support Activities for Road Transportation	11	◐ 0.8	-15.4%	(2)	1	9.1%	11.1%
Transportation & Logistics	4889	Other Support Activities for Transportation	163	● 40.9	-30.0%	(70)	3	1.8%	-4.1%
Transportation & Logistics	4931	Warehousing and Storage	59	◐ 0.6	34.1%	15	(6)	-10.2%	7.6%

Lincoln County, NC
Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Total	10	Total	20,182	1.0	-11.5%	(2,634)	2,683	13.3%	5.2%

Source: Avalanche Consulting using data from EMSI

Mecklenburg County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	179	○ 0.1	32.6%	44	7	3.9%	0.2%
Agribusiness & Food	1110	Crop Production	682	● 0.3	-9.9%	(75)	24	3.5%	-1.2%
Agribusiness & Food	3112	Grain and Oilseed Milling	133	● 0.6	-28.9%	(54)	(84)	-63.2%	-1.9%
Agribusiness & Food	3113	Sugar and Confectionery Product Manufacturing	22	○ 0.1	69.2%	9	4	18.2%	-4.3%
Agribusiness & Food	3114	Fruit & Vegetable Preserving & Specialty Food Mfg.	202	● 0.3	69.7%	83	22	10.9%	-3.8%
Agribusiness & Food	3115	Dairy Product Manufacturing	85	○ 0.2	553.8%	72	13	15.3%	1.1%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	1,768	● 1.6	-6.6%	(125)	(509)	-28.8%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	1,486	● 2.2	45.4%	464	43	2.9%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	564	● 0.8	-9.5%	(59)	(163)	-28.9%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	3,637	● 1.2	-19.6%	(886)	582	16.0%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	627	● 0.9	-21.2%	(169)	199	31.7%	10.0%
Apparel & Textiles	3132	Fabric Mills	627	● 3.2	104.2%	320	(158)	-25.2%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	49	● 0.4	-63.4%	(85)	(44)	-89.8%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	117	● 0.6	-68.1%	(250)	(48)	-41.0%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	88	● 0.4	-72.5%	(232)	7	8.0%	-6.4%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	11	○ 0.0	120.0%	6	(6)	-54.5%	-33.6%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	1,199	● 2.1	5.4%	61	(137)	-11.4%	-3.0%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	63	○ 0.1	-54.0%	(74)	(41)	-65.1%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	168	○ 0.1	-18.0%	(37)	(39)	-23.2%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	26	● 0.2	160.0%	16	6	23.1%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	1,688	● 1.3	-9.0%	(167)	(57)	-3.4%	0.3%
Back Office	5611	Office Administrative Services	2,390	● 1.3	20.6%	409	745	31.2%	12.4%
Back Office	5612	Facilities Support Services	1,448	● 2.3	30.2%	336	750	51.8%	14.8%
Back Office	5613	Employment Services	19,950	● 1.7	-10.6%	(2,354)	1,871	9.4%	6.0%
Back Office	5614	Business Support Services	4,103	● 1.2	25.3%	828	1,006	24.5%	9.4%
Back Office	5616	Investigation and Security Services	5,189	● 1.6	-1.8%	(96)	1,551	29.9%	9.9%
Back Office	5617	Services to Buildings and Dwellings	7,881	● 1.1	-9.2%	(795)	1,286	16.3%	9.8%
Back Office	5619	Other Support Services	2,335	● 2.0	14.1%	288	436	18.7%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	349	● 0.3	82.7%	158	70	20.1%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	550	● 0.4	-16.5%	(109)	(7)	-1.3%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	804	● 1.0	7.2%	54	254	31.6%	9.6%

Mecklenburg County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	924	● 0.9	32.6%	227	223	24.1%	16.3%
Building & Construction	2361	Residential Building Construction	2,609	● 1.1	-58.0%	(3,603)	74	2.8%	6.4%
Building & Construction	2362	Nonresidential Building Construction	3,057	● 1.1	-4.4%	(142)	877	28.7%	6.1%
Building & Construction	2371	Utility System Construction	588	● 0.4	-61.2%	(928)	(46)	-7.8%	4.6%
Building & Construction	2372	Land Subdivision	161	● 0.8	-70.9%	(392)	14	8.7%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	878	● 0.8	-67.4%	(1,819)	158	18.0%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	154	● 0.4	-37.1%	(91)	76	49.4%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	2,609	● 0.9	-33.2%	(1,297)	141	5.4%	4.7%
Building & Construction	2382	Building Equipment Contractors	8,796	● 1.3	-18.3%	(1,967)	1,417	16.1%	8.5%
Building & Construction	2383	Building Finishing Contractors	2,993	● 1.2	-34.6%	(1,586)	308	10.3%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	1,765	● 0.8	-26.6%	(641)	252	14.3%	7.7%
Building & Construction	3219	Other Wood Product Manufacturing	476	● 0.6	-33.6%	(241)	(9)	-1.9%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	52	● 0.3	-44.7%	(42)	(21)	-40.4%	-7.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	517	● 0.8	-39.0%	(331)	0	0.0%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	68	● 0.3	-35.2%	(37)	13	19.1%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	1,174	● 1.5	-29.1%	(483)	50	4.3%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	1,780	● 1.9	-26.9%	(656)	(25)	-1.4%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	3,931	● 0.9	-20.2%	(994)	699	17.8%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	192	● 0.4	-45.5%	(160)	(50)	-26.0%	0.6%
Consumer Goods Mftg	3352	Household Appliance Manufacturing	212	● 1.0	685.2%	185	91	42.9%	-10.3%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	753	● 0.7	-20.7%	(196)	140	18.6%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	990	● 0.7	-19.4%	(239)	(92)	-9.3%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	407	● 0.5	-15.6%	(75)	(78)	-19.2%	1.3%
Culture & Entertainment	7111	Performing Arts Companies	242	● 0.5	-9.0%	(24)	(128)	-52.9%	1.6%
Culture & Entertainment	7112	Spectator Sports	1,775	● 3.4	8.4%	137	300	16.9%	7.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	445	● 1.1	-24.7%	(146)	(38)	-8.5%	9.5%
Culture & Entertainment	7114	Agents & Managers for Artists, Athletes, & Others	117	● 1.4	-27.8%	(45)	5	4.3%	6.8%
Culture & Entertainment	7115	Independent Artists, Writers, and Performers	125	● 0.7	11.6%	13	20	16.0%	13.1%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	464	● 0.8	-17.4%	(98)	141	30.4%	8.8%
Culture & Entertainment	7131	Amusement Parks and Arcades	745	● 1.0	-8.9%	(73)	(67)	-9.0%	3.5%
Culture & Entertainment	7132	Gambling Industries	40	○ 0.1		40	40	100.0%	19.8%

Mecklenburg County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7139	Other Amusement and Recreation Industries	6,606	● 1.5	59.4%	2,461	1,743	26.4%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	5,403	● 0.8	-12.3%	(760)	436	8.1%	3.2%
Culture & Entertainment	7213	Rooming and Boarding Houses	45	● 1.0	-4.3%	(2)	1	2.2%	-1.9%
Culture & Entertainment	7221	Full-Service Restaurants	21,090	● 1.1	10.7%	2,046	2,044	9.7%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	20,591	● 1.2	15.2%	2,716	3,050	14.8%	6.5%
Culture & Entertainment	7223	Special Food Services	2,133	● 0.9	-0.1%	(2)	136	6.4%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	1,725	● 1.2	26.4%	360	183	10.6%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	2,902	● 1.0	35.2%	755	379	13.1%	13.4%
Education	6112	Junior Colleges (Private)	119	● 0.5	-27.0%	(44)	(5)	-4.2%	14.3%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	3,674	● 0.7	41.8%	1,083	663	18.0%	11.7%
Education	6114	Bus. Schools & Comp. & Mgmt. Training (Private)	383	● 1.2	-20.0%	(96)	6	1.6%	3.0%
Education	6115	Technical and Trade Schools (Private)	235	● 0.4	-21.9%	(66)	(18)	-7.7%	14.1%
Education	6116	Other Schools and Instruction (Private)	1,311	● 1.0	24.6%	259	108	8.2%	16.8%
Education	6117	Educational Support Services (Private)	308	● 0.6	51.7%	105	77	25.0%	23.6%
Electronics	3341	Computer & Peripheral Equipment Manufacturing	719	● 1.1	-39.0%	(460)	(204)	-28.4%	-12.6%
Electronics	3342	Communications Equipment Manufacturing	56	○ 0.1	154.5%	34	47	83.9%	-8.5%
Electronics	3343	Audio and Video Equipment Manufacturing	149	● 1.8	-20.3%	(38)	(60)	-40.3%	-22.3%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	402	● 0.3	-61.3%	(638)	(322)	-80.1%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	62	○ 0.0	-17.3%	(13)	(7)	-11.3%	-0.4%
Electronics	3346	Mfg. and Reproducing Magnetic and Optical Media	1,213	● 12.3	-7.6%	(100)	173	14.3%	-13.1%
Electronics	3359	Other Electrical Equipment & Component Mfg.	119	● 0.2	72.5%	50	(26)	-21.8%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	1,441	● 1.1	-10.3%	(165)	(135)	-9.4%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	6,305	● 1.8	19.1%	1,010	856	13.6%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	191	● 0.5	-8.6%	(18)	(47)	-24.6%	2.8%
Energy	2131	Support Activities for Mining	18	○ 0.0	260.0%	13	3	16.7%	-1.1%
Energy	2211	Electric Power Gen., Transmission & Distribution	1,385	● 0.8	-23.9%	(434)	(526)	-38.0%	-3.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	834	● 1.7	-14.5%	(141)	(60)	-7.2%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	299	● 0.8	13.3%	35	17	5.7%	-6.0%
Energy	4862	Pipeline Transportation of Natural Gas	18	○ 0.2		18	20	111.1%	-1.7%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	1,658	● 0.9	-41.5%	(1,177)	(300)	-18.1%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	1,382	● 0.7	-46.4%	(1,197)	(400)	-28.9%	-10.1%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	698	0.5	-17.1%	(144)	(66)	-9.5%	5.9%
Engineering, Design, & Conte	5122	Sound Recording Industries	30	0.5	-63.0%	(51)	(5)	-16.7%	-16.8%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	2,101	2.4	16.7%	301	(147)	-7.0%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	2,185	6.5	19.6%	358	629	28.8%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	7,404	1.3	-14.9%	(1,294)	613	8.3%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	383	0.8	-17.8%	(83)	11	2.9%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	1,196	0.7	-31.1%	(541)	(192)	-16.1%	3.0%
Finance	5211	Monetary Authorities-Central Bank	449	5.0	-44.8%	(364)	74	16.5%	3.3%
Finance	5221	Depository Credit Intermediation	23,607	3.3	1.3%	306	4,834	20.5%	3.4%
Finance	5222	Nondepository Credit Intermediation	4,788	2.2	-27.6%	(1,822)	(1,150)	-24.0%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	1,168	1.1	-38.8%	(741)	51	4.4%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	4,203	2.2	-19.5%	(1,019)	503	12.0%	3.1%
Finance	5232	Securities and Commodity Exchanges	11	0.4	120.0%	6	3	27.3%	3.7%
Finance	5239	Other Financial Investment Activities	4,756	3.3	16.3%	665	1,341	28.2%	6.8%
Finance	5241	Insurance Carriers	6,915	1.5	-9.6%	(733)	25	0.4%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	4,102	1.1	-0.7%	(27)	478	11.7%	7.6%
Finance	5251	Insurance and Employee Benefit Funds	194	1.0	65.8%	77	3	1.5%	5.0%
Finance	5259	Other Investment Pools and Funds	50	0.3	-27.5%	(19)	(9)	-18.0%	5.1%
Finance	5311	Lessors of Real Estate	1,706	0.7	-5.2%	(94)	111	6.5%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	1,610	1.4	-37.9%	(983)	48	3.0%	5.2%
Finance	5313	Activities Related to Real Estate	3,172	1.4	5.5%	164	648	20.4%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	382	0.4	-41.1%	(267)	(45)	-11.8%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	101	0.3	-17.9%	(22)	(25)	-24.8%	-5.8%
Furniture	3379	Other Furniture Related Product Manufacturing	150	1.0	33.9%	38	30	20.0%	-6.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	886	2.3	41.3%	259	294	33.2%	1.6%
Government	5621	Waste Collection	426	0.7	43.4%	129	81	19.0%	8.7%
Government	5622	Waste Treatment and Disposal	183	0.5	-46.6%	(160)	(21)	-11.5%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	267	0.5	49.2%	88	67	25.1%	8.6%
Government	9011	Federal Government, Civilian	6,294	0.5	17.2%	925	317	5.0%	1.4%
Government	9012	Federal Government, Military	2,245	0.3	-4.3%	(100)	13	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	7,233	0.6	7.3%	493	150	2.1%	4.3%

Mecklenburg County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Government	9029	State Government, Excluding Education & Hospitals	1,626	● 0.2	-7.5%	(132)	37	2.3%	3.8%
Government	9036	Education and Hospitals (Local Government)	33,470	● 0.9	11.1%	3,350	3,554	10.6%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	19,933	● 0.9	6.7%	1,255	2,548	12.8%	4.8%
Healthcare	6211	Offices of Physicians	10,123	● 1.0	28.6%	2,249	2,457	24.3%	14.0%
Healthcare	6212	Offices of Dentists	3,552	● 1.0	20.7%	609	766	21.6%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	2,138	● 0.7	25.9%	440	299	14.0%	17.6%
Healthcare	6214	Outpatient Care Centers	1,611	● 0.6	58.4%	594	362	22.5%	15.1%
Healthcare	6216	Home Health Care Services	2,317	● 0.5	59.9%	868	601	25.9%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	1,110	● 1.0	25.9%	228	12	1.1%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	5,177	● 0.3	-5.9%	(326)	541	10.5%	6.6%
Healthcare	6223	Specialty Hospitals (Private)	1,360	● 1.5	2566.7%	1,309	302	22.2%	14.7%
Healthcare	6231	Nursing Care Facilities	2,988	● 0.4	7.4%	205	417	14.0%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	1,690	● 0.7	28.8%	378	370	21.9%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	3,418	● 1.0	16.8%	492	580	17.0%	12.4%
Healthcare	6239	Other Residential Care Facilities	1,072	● 1.6	-0.1%	(1)	156	14.6%	8.8%
Healthcare	6241	Individual and Family Services	3,476	● 0.6	17.8%	524	1,581	45.5%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	505	● 0.8	4.8%	23	74	14.7%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	865	● 0.6	22.5%	159	200	23.1%	10.1%
Healthcare	6244	Child Day Care Services	3,283	● 1.0	-6.7%	(237)	333	10.1%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	252	● 0.3	-49.4%	(246)	(116)	-46.0%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	464	● 1.1	-40.4%	(315)	(246)	-53.0%	-13.2%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	466	● 1.2	19.8%	77	72	15.5%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	549	● 1.1	14.9%	71	(130)	-23.7%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	427	● 0.7	-27.3%	(160)	(77)	-18.0%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	1,322	● 3.4	15.6%	178	(79)	-6.0%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	1,704	● 1.8	10.4%	161	(19)	-1.1%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	319	● 1.8	6280.0%	314	(98)	-30.7%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	120	● 0.2	-53.8%	(140)	(90)	-75.0%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	4,261	● 1.7	15.5%	572	438	10.3%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	6,481	● 2.6	-11.5%	(839)	183	2.8%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	653	● 0.5	-19.8%	(161)	(261)	-40.0%	4.7%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	585	● 0.8	-20.9%	(155)	50	8.5%	3.3%
Logging & Metal/Mineral Mi	1153	Support Activities for Forestry	99	● 1.7	50.0%	33	6	6.1%	-0.1%
Logging & Metal/Mineral Mi	2123	Nonmetallic Mineral Mining and Quarrying	106	● 0.3	-53.3%	(121)	7	6.6%	-2.9%
Materials	3221	Pulp, Paper, and Paperboard Mills	257	● 0.6	-39.8%	(170)	(11)	-4.3%	-18.9%
Materials	3222	Converted Paper Product Manufacturing	1,747	● 1.6	11.8%	184	(200)	-11.4%	-10.3%
Materials	3251	Basic Chemical Manufacturing	285	● 0.5	-55.6%	(357)	(190)	-66.7%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	186	● 0.5	-19.8%	(46)	(51)	-27.4%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	207	● 0.9	-4.6%	(10)	54	26.1%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	343	● 0.8	-36.9%	(201)	(44)	-12.8%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	431	● 1.3	-20.9%	(114)	51	11.8%	-7.6%
Materials	3261	Plastics Product Manufacturing	2,092	● 1.0	-6.1%	(137)	(432)	-20.7%	-4.9%
Materials	3262	Rubber Product Manufacturing	387	● 0.8	-59.5%	(569)	(76)	-19.6%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	769	● 1.6	-13.9%	(124)	68	8.8%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	948	● 1.9	-9.4%	(98)	(136)	-14.3%	-2.6%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	384	● 1.1	44.9%	119	40	10.4%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	19	○ 0.1	-80.6%	(79)	(14)	-73.7%	-4.0%
Metalworking	3313	Alumina and Aluminum Production and Processing	50	● 0.2	85.2%	23	(19)	-38.0%	-8.5%
Metalworking	3314	Nonferrous Metal Production and Processing	15	○ 0.1	-11.8%	(2)	(10)	-66.7%	-7.7%
Metalworking	3315	Foundries	392	● 0.8	-18.2%	(87)	(20)	-5.1%	-11.8%
Metalworking	3321	Forging and Stamping	170	● 0.5	-17.1%	(35)	(45)	-26.5%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	214	● 1.4	20.9%	37	47	22.0%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	554	● 0.4	-56.0%	(705)	(84)	-15.2%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	234	● 0.7	-39.2%	(151)	(105)	-44.9%	-5.3%
Metalworking	3326	Spring and Wire Product Manufacturing	144	● 0.9	-45.9%	(122)	(105)	-72.9%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	430	● 0.3	-4.0%	(18)	(38)	-8.8%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	251	● 0.5	-23.0%	(75)	(27)	-10.8%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	572	● 0.6	19.7%	94	(20)	-3.5%	-5.4%
Metalworking	3365	Railroad Rolling Stock Manufacturing	32	● 0.4		32	3	9.4%	-10.7%
Non-Profits	8131	Religious Organizations	642	● 0.8	-4.6%	(31)	305	47.5%	5.6%
Non-Profits	8132	Grantmaking and Giving Services	438	● 0.8	-9.5%	(46)	48	11.0%	6.9%
Non-Profits	8133	Social Advocacy Organizations	165	● 0.2	-24.7%	(54)	28	17.0%	7.4%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Non-Profits	8134	Civic and Social Organizations	719	● 0.4	-76.2%	(2,302)	(459)	-63.8%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	731	● 0.4	0.3%	2	232	31.7%	6.6%
Professional Services	5411	Legal Services	5,161	● 1.1	-1.8%	(94)	450	8.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	5,446	● 1.4	-4.9%	(282)	422	7.7%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	1,990	● 0.8	-7.5%	(161)	105	5.3%	8.5%
Professional Services	5511	Management of Companies and Enterprises	24,875	● 3.2	7.3%	1,697	636	2.6%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	10,131	● 2.1	22.6%	1,866	3,707	36.6%	28.1%
Research	5417	Scientific Research and Development Services	832	● 0.3	78.2%	365	139	16.7%	9.8%
Retail	4411	Automobile Dealers	4,217	● 1.0	-17.0%	(866)	191	4.5%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	302	● 0.6	-22.0%	(85)	25	8.3%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	1,936	● 0.9	7.2%	130	180	9.3%	1.0%
Retail	4421	Furniture Stores	1,114	● 1.3	-30.1%	(480)	96	8.6%	1.6%
Retail	4422	Home Furnishings Stores	1,608	● 1.8	-17.7%	(346)	356	22.1%	2.6%
Retail	4431	Electronics and Appliance Stores	3,185	● 1.6	-16.9%	(647)	(215)	-6.8%	2.9%
Retail	4451	Grocery Stores	8,482	● 0.8	2.9%	237	(230)	-2.7%	2.3%
Retail	4452	Specialty Food Stores	248	● 0.3	-49.5%	(243)	(96)	-38.7%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	245	● 0.4	6.5%	15	(70)	-28.6%	1.7%
Retail	4461	Health and Personal Care Stores	4,401	● 1.1	-0.8%	(34)	332	7.5%	6.6%
Retail	4471	Gasoline Stations	1,795	● 0.5	-13.3%	(276)	(2)	-0.1%	-2.3%
Retail	4481	Clothing Stores	4,899	● 1.1	-11.0%	(606)	647	13.2%	3.6%
Retail	4482	Shoe Stores	725	● 0.9	-20.5%	(187)	(15)	-2.1%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	478	● 0.8	-25.3%	(162)	(16)	-3.3%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	1,708	● 0.9	-10.2%	(195)	17	1.0%	4.9%
Retail	4512	Book, Periodical, and Music Stores	531	● 1.0	-13.0%	(79)	84	15.8%	-10.2%
Retail	4521	Department Stores	6,577	● 1.1	-2.7%	(180)	228	3.5%	-3.3%
Retail	4529	Other General Merchandise Stores	4,013	● 0.6	11.6%	416	925	23.1%	15.1%
Retail	4531	Florists	179	● 0.7	-28.7%	(72)	(19)	-10.6%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	1,708	● 1.4	-4.2%	(75)	(139)	-8.1%	-7.1%
Retail	4533	Used Merchandise Stores	761	● 1.4	5.1%	37	(32)	-4.2%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	955	● 0.9	0.3%	3	(127)	-13.3%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	121	○ 0.1	42.4%	36	28	23.1%	6.3%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4542	Vending Machine Operators	127	● 0.8	17.6%	19	(79)	-62.2%	-0.7%
Retail	4543	Direct Selling Establishments	204	● 0.4	-29.2%	(84)	(37)	-18.1%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	1,241	● 1.8	-26.3%	(442)	(14)	-1.1%	2.5%
Retail	5322	Consumer Goods Rental	491	● 0.7	-39.2%	(317)	(41)	-8.4%	-1.0%
Retail	5323	General Rental Centers	336	● 2.1	5.3%	17	190	56.5%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	500	● 1.0	-11.8%	(67)	34	6.8%	0.9%
Retail	5331	Lessors of Nonfinancial Intangible Assets	15	○ 0.1	-86.5%	(96)	(10)	-66.7%	9.6%
Retail	8111	Automotive Repair and Maintenance	2,640	● 0.8	-11.9%	(356)	188	7.1%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	258	● 1.0	-21.8%	(72)	(18)	-7.0%	-2.2%
Retail	8121	Personal Care Services	2,542	● 1.0	8.1%	190	399	15.7%	11.4%
Retail	8122	Death Care Services	205	● 0.4	2.5%	5	(33)	-16.1%	1.2%
Retail	8123	Drycleaning and Laundry Services	1,286	● 1.0	-26.0%	(451)	(228)	-17.7%	-0.8%
Retail	8129	Other Personal Services	1,354	● 1.3	-11.8%	(182)	15	1.1%	6.0%
Retail	8141	Private Households	1,022	● 0.4	13.4%	121	(47)	-4.6%	13.6%
Software / Info. Tech.	5112	Software Publishers	517	● 0.5	92.2%	248	232	44.9%	13.1%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	5,693	● 5.7	-7.8%	(482)	57	1.0%	15.6%
Software / Info. Tech.	5191	Other Information Services	638	● 0.9	146.3%	379	73	11.4%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	6,226	● 1.0	15.3%	824	701	11.3%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	2,369	● 1.0	-8.8%	(228)	(578)	-24.4%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	734	● 1.1	5.2%	36	(63)	-8.6%	5.1%
Telecom Services	5174	Satellite Telecommunications	10	● 0.2	-56.5%	(13)	2	20.0%	13.7%
Telecom Services	5179	Other Telecommunications	1,535	● 3.5	-5.8%	(94)	152	9.9%	-4.3%
Transportation & Logistics	4811	Scheduled Air Transportation	6,048	● 3.6	7.0%	398	182	3.0%	1.1%
Transportation & Logistics	4812	Nonscheduled Air Transportation	30	● 0.2	-60.0%	(45)	(3)	-10.0%	7.0%
Transportation & Logistics	4821	Rail Transportation	156	● 0.2	-17.0%	(32)	(8)	-5.1%	0.3%
Transportation & Logistics	4831	Deep Sea, Coastal, & Great Lakes Water Transp.	521	● 3.3	32.9%	129	132	25.3%	2.6%
Transportation & Logistics	4841	General Freight Trucking	6,367	● 1.7	-25.9%	(2,226)	136	2.1%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	862	● 0.5	-26.3%	(307)	(32)	-3.7%	4.9%
Transportation & Logistics	4851	Urban Transit Systems	154	● 0.9	-35.6%	(85)	62	40.3%	11.4%
Transportation & Logistics	4852	Interurban and Rural Bus Transportation	733	● 10.0	-1.9%	(14)	35	4.8%	-3.0%
Transportation & Logistics	4853	Taxi and Limousine Service	167	● 0.6	3.7%	6	24	14.4%	1.7%

Mecklenburg County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4855	Charter Bus Industry	79	● 0.7	-30.1%	(34)	11	13.9%	0.1%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	23	○ 0.1	-36.1%	(13)	(7)	-30.4%	10.6%
Transportation & Logistics	4881	Support Activities for Air Transportation	429	● 0.6	-13.3%	(66)	38	8.9%	10.7%
Transportation & Logistics	4882	Support Activities for Rail Transportation	119	● 1.2	24.0%	23	44	37.0%	2.8%
Transportation & Logistics	4884	Support Activities for Road Transportation	423	● 1.2	-13.1%	(64)	88	20.8%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	1,489	● 2.0	-10.9%	(182)	124	8.3%	4.4%
Transportation & Logistics	4889	Other Support Activities for Transportation	35	● 0.3	-61.5%	(56)	(6)	-17.1%	-4.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	2,845	● 1.5	-18.4%	(643)	206	7.2%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	211	● 1.2	34.4%	54	67	31.8%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	1,899	● 0.7	-3.6%	(70)	408	21.5%	7.6%
Total	10	Total	551,707	● 1.0	-3.2%	(18,316)	52,150	9.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	248	● 1.4	1.6%	4	43	17.3%	-1.2%
Agribusiness & Food	3111	Animal Food Manufacturing	26	● 1.5	420.0%	21	(1)	-3.8%	-1.6%
Agribusiness & Food	3116	Animal Slaughtering and Processing	73	○ 0.4	-59.9%	(109)	(12)	-16.4%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	40	○ 0.4	21.2%	7	(1)	-2.5%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	10	○ 0.2	-80.0%	(40)	0	0.0%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	12	○ 0.2	-76.0%	(38)	(7)	-58.3%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	230	● 0.9	-17.6%	(49)	86	37.4%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	79	● 1.4	21.5%	14	(9)	-11.4%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	167	● 20.2	-62.1%	(274)	(162)	-97.0%	-26.5%
Apparel & Textiles	3132	Fabric Mills	78	● 4.9	34.5%	20	115	147.4%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	18	● 1.7	-21.7%	(5)	(18)	-100.0%	-33.5%
Apparel & Textiles	3149	Other Textile Product Mills	24	● 1.2		24	(19)	-79.2%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	37	● 8.3	-49.3%	(36)	(32)	-86.5%	-52.1%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	21	○ 0.5	61.5%	8	3	14.3%	-3.0%
Automotive	3361	Motor Vehicle Manufacturing	2,180	● 43.6	-10.9%	(267)	(177)	-8.1%	-6.4%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	42	● 1.1	-66.1%	(82)	(37)	-88.1%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	471	● 3.5	0.0%	0	326	69.2%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	16	● 1.4	-30.4%	(7)	(11)	-68.8%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	218	● 2.1	45.3%	68	31	14.2%	0.3%
Back Office	5611	Office Administrative Services	77	◐ 0.5	60.4%	29	11	14.3%	12.4%
Back Office	5613	Employment Services	368	○ 0.4	-30.3%	(160)	14	3.8%	6.0%
Back Office	5614	Business Support Services	49	○ 0.2	88.5%	23	(5)	-10.2%	9.4%
Back Office	5616	Investigation and Security Services	136	◐ 0.5	-15.0%	(24)	(9)	-6.6%	9.9%
Back Office	5617	Services to Buildings and Dwellings	386	● 0.6	17.0%	56	91	23.6%	9.8%
Back Office	5619	Other Support Services	79	● 0.8	-2.5%	(2)	8	10.1%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	112	● 1.2	2140.0%	107	39	34.8%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	13	○ 0.1	-51.9%	(14)	1	7.7%	3.8%
Building & Construction	2361	Residential Building Construction	118	● 0.6	-55.5%	(147)	(40)	-33.9%	6.4%
Building & Construction	2362	Nonresidential Building Construction	184	● 0.8	178.8%	118	48	26.1%	6.1%
Building & Construction	2371	Utility System Construction	83	● 0.6	107.5%	43	39	47.0%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	48	◐ 0.5	-52.5%	(53)	(37)	-77.1%	6.3%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	389	● 1.7	35.1%	101	259	66.6%	4.7%
Building & Construction	2382	Building Equipment Contractors	913	● 1.6	-25.4%	(311)	213	23.3%	8.5%
Building & Construction	2383	Building Finishing Contractors	97	○ 0.5	-63.9%	(172)	(10)	-10.3%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	110	● 0.6	-64.9%	(203)	(35)	-31.8%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	42	● 1.6	-47.5%	(38)	(12)	-28.6%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	314	● 5.2	-43.2%	(239)	(74)	-23.6%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	231	● 18.2	-44.3%	(184)	(170)	-73.6%	-7.3%
Building & Construction	3272	Glass and Glass Product Manufacturing	40	● 1.6	2.6%	1	(2)	-5.0%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	128	● 2.3	-20.0%	(32)	50	39.1%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	63	● 2.9	-47.5%	(57)	0	0.0%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	198	● 3.1	-38.5%	(124)	(25)	-12.6%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	69	● 0.9	-18.8%	(16)	7	10.1%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	259	● 0.8	-20.8%	(68)	(16)	-6.2%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	56	● 1.3	0.0%	0	(2)	-3.6%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	86	● 1.0	-66.8%	(173)	(53)	-61.6%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	66	● 0.6	-29.0%	(27)	43	65.2%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	18	○ 0.3	50.0%	6	4	22.2%	1.3%
Culture & Entertainment	7112	Spectator Sports	35	● 0.8	-32.7%	(17)	10	28.6%	7.3%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	20	○ 0.4	53.8%	7	3	15.0%	8.8%
Culture & Entertainment	7131	Amusement Parks and Arcades	19	○ 0.3	-5.0%	(1)	(3)	-15.8%	3.5%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	552	● 1.5	73.6%	234	121	21.9%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	147	○ 0.3	-23.8%	(46)	(28)	-19.0%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	1,467	● 0.9	2.0%	29	(25)	-1.7%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	1,608	● 1.1	-2.8%	(47)	33	2.1%	6.5%
Culture & Entertainment	7223	Special Food Services	108	◐ 0.6	3.8%	4	9	8.3%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	30	○ 0.3	-16.7%	(6)	7	23.3%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	90	○ 0.4	25.0%	18	14	15.6%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	604	● 1.5	8.1%	45	19	3.1%	11.7%
Education	6116	Other Schools and Instruction (Private)	87	● 0.8	-2.2%	(2)	1	1.1%	16.8%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	74	◐ 0.6	-27.5%	(28)	(69)	-93.2%	-0.4%
Electronics	4236	Electrical & Electronic Goods Wholesalers	22	○ 0.2	-72.8%	(59)	(5)	-22.7%	-0.2%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	214	● 0.7	7.0%	14	35	16.4%	14.4%
Energy	2131	Support Activities for Mining	11	○ 0.1	-8.3%	(1)	5	45.5%	-1.1%
Energy	2211	Electric Power Gen., Transmission & Distribution	76	◐ 0.6	-7.3%	(6)	6	7.9%	-3.7%
Energy	2212	Natural Gas Distribution	90	● 2.5	-22.4%	(26)	9	10.0%	0.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	70	● 1.8	-12.5%	(10)	3	4.3%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	30	● 1.0	50.0%	10	(5)	-16.7%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	47	○ 0.3	-36.5%	(27)	(14)	-29.8%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	140	● 0.9	-1.4%	(2)	(2)	-1.4%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	57	○ 0.5	256.3%	41	16	28.1%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	11	○ 0.2	120.0%	6	(6)	-54.5%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	36	● 1.3	-42.9%	(27)	7	19.4%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	211	○ 0.5	73.0%	89	53	25.1%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	21	◐ 0.5	16.7%	3	11	52.4%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	39	○ 0.3	-37.1%	(23)	2	5.1%	3.0%
Finance	5221	Depository Credit Intermediation	372	● 0.6	-4.9%	(19)	(2)	-0.5%	3.4%
Finance	5222	Nondepository Credit Intermediation	40	○ 0.2	-45.2%	(33)	1	2.5%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	13	○ 0.2	-31.6%	(6)	(8)	-61.5%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	30	○ 0.2	0.0%	0	7	23.3%	3.1%
Finance	5239	Other Financial Investment Activities	19	○ 0.2	0.0%	0	1	5.3%	6.8%
Finance	5241	Insurance Carriers	55	○ 0.1	-12.7%	(8)	7	12.7%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	82	○ 0.3	-38.3%	(51)	(25)	-30.5%	7.6%
Finance	5311	Lessors of Real Estate	61	○ 0.3	-19.7%	(15)	1	1.6%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	35	○ 0.4	-36.4%	(20)	(2)	-5.7%	5.2%
Finance	5313	Activities Related to Real Estate	45	○ 0.2	-11.8%	(6)	(3)	-6.7%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	14	○ 0.2	-87.4%	(97)	(9)	-64.3%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	74	● 2.4	-70.3%	(175)	(25)	-33.8%	-5.8%
Furniture	4232	Furniture & Home Furnishing Wholesalers	33	● 1.1	-35.3%	(18)	3	9.1%	1.6%
Government	5621	Waste Collection	47	● 0.9	62.1%	18	3	6.4%	8.7%
Government	5622	Waste Treatment and Disposal	63	● 1.9	-14.9%	(11)	12	19.0%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	86	● 2.0	1620.0%	81	9	10.5%	8.6%
Government	9011	Federal Government, Civilian	2,450	● 2.3	19.3%	396	94	3.8%	1.4%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Government	9012	Federal Government, Military	359	0.5	0.8%	3	2	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	909	1.0	5.9%	51	(29)	-3.2%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	865	1.1	-1.0%	(9)	(29)	-3.4%	3.8%
Government	9036	Education and Hospitals (Local Government)	2,744	0.9	-9.4%	(284)	105	3.8%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	1,945	1.0	0.3%	6	81	4.2%	4.8%
Healthcare	6211	Offices of Physicians	459	0.6	-26.6%	(166)	(10)	-2.2%	14.0%
Healthcare	6212	Offices of Dentists	296	1.0	8.8%	24	70	23.6%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	124	0.5	77.1%	54	38	30.6%	17.6%
Healthcare	6214	Outpatient Care Centers	41	0.2	32.3%	10	8	19.5%	15.1%
Healthcare	6216	Home Health Care Services	624	1.6	132.8%	356	216	34.6%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	26	0.3	85.7%	12	4	15.4%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	1,269	0.8	-12.8%	(186)	170	13.4%	6.6%
Healthcare	6231	Nursing Care Facilities	1,008	1.8	5.3%	51	119	11.8%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	333	1.7	-8.8%	(32)	31	9.3%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	489	1.8	6.1%	28	46	9.4%	12.4%
Healthcare	6239	Other Residential Care Facilities	142	2.6	-22.4%	(41)	33	23.2%	8.8%
Healthcare	6241	Individual and Family Services	222	0.5	9.9%	20	47	21.2%	19.5%
Healthcare	6243	Vocational Rehabilitation Services	80	0.7	300.0%	60	31	38.8%	10.1%
Healthcare	6244	Child Day Care Services	291	1.1	14.1%	36	13	4.5%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	38	0.5	-74.0%	(108)	(22)	-57.9%	-0.9%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	81	1.9	-35.2%	(44)	(63)	-77.8%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	29	0.5	107.1%	15	13	44.8%	-4.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	26	0.3	-23.5%	(8)	(9)	-34.6%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	42	2.9	740.0%	37	(3)	-7.1%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	149	3.4	-34.1%	(77)	(116)	-77.9%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	132	0.6	9.1%	11	1	0.8%	0.2%
Industrial Machinery	4238	Machinery, Equipment, and Supplies Merchant Who	311	1.5	132.1%	177	96	30.9%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	102	1.0	-2.9%	(3)	11	10.8%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	46	0.8	-9.8%	(5)	(1)	-2.2%	3.3%
Logging & Metal/Mineral Mi	1133	Logging	11	0.7	120.0%	6	0	0.0%	-4.2%
Logging & Metal/Mineral Mi	2123	Nonmetallic Mineral Mining and Quarrying	189	6.4	-31.3%	(86)	(51)	-27.0%	-2.9%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Materials	3222	Converted Paper Product Manufacturing	584	● 6.4	38.4%	162	50	8.6%	-10.3%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	433	● 14.9	-36.1%	(245)	(245)	-56.6%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	11	◐ 0.6	120.0%	6	1	9.1%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	27	● 0.8	92.9%	13	(13)	-48.1%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	55	● 2.0	-52.6%	(61)	(17)	-30.9%	-7.6%
Materials	3261	Plastics Product Manufacturing	33	○ 0.2	-21.4%	(9)	10	30.3%	-4.9%
Materials	3262	Rubber Product Manufacturing	234	● 6.0	-43.5%	(180)	(50)	-21.4%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	17	○ 0.4	-45.2%	(14)	1	5.9%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	62	● 1.5	-25.3%	(21)	16	25.8%	-2.6%
Metalworking	3313	Alumina and Aluminum Production and Processing	95	● 5.2	-64.3%	(171)	(78)	-82.1%	-8.5%
Metalworking	3323	Architectural and Structural Metals Manufacturing	488	● 4.5	674.6%	425	30	6.1%	1.9%
Metalworking	3326	Spring and Wire Product Manufacturing	38	● 2.8	15.2%	5	(4)	-10.5%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	172	● 1.6	-3.9%	(7)	2	1.2%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	41	● 1.0	-24.1%	(13)	(14)	-34.1%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	41	○ 0.5	-62.0%	(67)	(19)	-46.3%	-5.4%
Non-Profits	8133	Social Advocacy Organizations	126	● 1.9	14.5%	16	36	28.6%	7.4%
Non-Profits	8134	Civic and Social Organizations	16	○ 0.1	-94.8%	(294)	(11)	-68.8%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	53	○ 0.4	-31.2%	(24)	19	35.8%	6.6%
Professional Services	5411	Legal Services	213	◐ 0.6	8.7%	17	10	4.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	165	◐ 0.5	-7.3%	(13)	18	10.9%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	133	● 0.7	-13.1%	(20)	11	8.3%	8.5%
Professional Services	5511	Management of Companies and Enterprises	2,400	● 3.8	-0.3%	(8)	229	9.5%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	74	○ 0.2	4.2%	3	10	13.5%	28.1%
Retail	4411	Automobile Dealers	337	● 1.0	-3.2%	(11)	29	8.6%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	133	● 3.0	-17.4%	(28)	37	27.8%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	293	● 1.7	-8.4%	(27)	17	5.8%	1.0%
Retail	4421	Furniture Stores	44	● 0.6	-4.3%	(2)	2	4.5%	1.6%
Retail	4422	Home Furnishings Stores	32	○ 0.4	-20.0%	(8)	(6)	-18.8%	2.6%
Retail	4431	Electronics and Appliance Stores	26	○ 0.2	-72.0%	(67)	(21)	-80.8%	2.9%
Retail	4451	Grocery Stores	880	● 1.0	-12.0%	(120)	(74)	-8.4%	2.3%
Retail	4461	Health and Personal Care Stores	352	● 1.0	-13.1%	(53)	20	5.7%	6.6%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4471	Gasoline Stations	397	● 1.5	-5.9%	(25)	(19)	-4.8%	-2.3%
Retail	4481	Clothing Stores	108	○ 0.3	-15.0%	(19)	0	0.0%	3.6%
Retail	4482	Shoe Stores	39	◐ 0.6	-27.8%	(15)	(7)	-17.9%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	21	○ 0.5	-53.3%	(24)	(11)	-52.4%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	37	○ 0.2	-7.5%	(3)	(12)	-32.4%	4.9%
Retail	4512	Book, Periodical, and Music Stores	18	○ 0.4	-50.0%	(18)	(13)	-72.2%	-10.2%
Retail	4521	Department Stores	262	◐ 0.5	65.8%	104	13	5.0%	-3.3%
Retail	4529	Other General Merchandise Stores	716	● 1.4	13.3%	84	137	19.1%	15.1%
Retail	4531	Florists	66	● 3.0	61.0%	25	25	37.9%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	67	● 0.7	-32.3%	(32)	(17)	-25.4%	-7.1%
Retail	4533	Used Merchandise Stores	44	● 1.0	-31.3%	(20)	0	0.0%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	37	○ 0.4	5.7%	2	(9)	-24.3%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	15	○ 0.2	200.0%	10	3	20.0%	6.3%
Retail	4543	Direct Selling Establishments	41	● 1.0	2.5%	1	(17)	-41.5%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	27	○ 0.5	68.8%	11	10	37.0%	2.5%
Retail	5322	Consumer Goods Rental	16	○ 0.3	-48.4%	(15)	(1)	-6.3%	-1.0%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	17	○ 0.4	240.0%	12	1	5.9%	0.9%
Retail	8111	Automotive Repair and Maintenance	261	● 1.0	-27.3%	(98)	4	1.5%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	13	◐ 0.6	-50.0%	(13)	(8)	-61.5%	-2.2%
Retail	8121	Personal Care Services	82	○ 0.4	-17.2%	(17)	8	9.8%	11.4%
Retail	8122	Death Care Services	57	● 1.3	-9.5%	(6)	(4)	-7.0%	1.2%
Retail	8123	Drycleaning and Laundry Services	35	○ 0.4	-44.4%	(28)	(17)	-48.6%	-0.8%
Retail	8129	Other Personal Services	39	○ 0.5	680.0%	34	3	7.7%	6.0%
Retail	8141	Private Households	52	○ 0.2	-32.5%	(25)	(7)	-13.5%	13.6%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	14	○ 0.2	180.0%	9	(9)	-64.3%	15.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	32	○ 0.1	-23.8%	(10)	(6)	-18.8%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	79	○ 0.4	36.2%	21	32	40.5%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	16	○ 0.3	-11.1%	(2)	4	25.0%	5.1%
Transportation & Logistics	4821	Rail Transportation	164	● 2.2	-11.4%	(21)	3	1.8%	0.3%
Transportation & Logistics	4841	General Freight Trucking	815	● 2.7	12.1%	88	163	20.0%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	288	● 2.2	-34.7%	(153)	(22)	-7.6%	4.9%

Rowan County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4853	Taxi and Limousine Service	12	☐ 0.5	140.0%	7	1	8.3%	1.7%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	41	● 1.5	-54.4%	(49)	6	14.6%	10.6%
Transportation & Logistics	4884	Support Activities for Road Transportation	65	● 2.2	35.4%	17	31	47.7%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	20	○ 0.3	-25.9%	(7)	(15)	-75.0%	4.4%
Transportation & Logistics	4889	Other Support Activities for Transportation	162	● 18.2	14.1%	20	20	12.3%	-4.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	234	● 1.5	-6.8%	(17)	17	7.3%	1.9%
Transportation & Logistics	4931	Warehousing and Storage	1,236	● 5.7	6.8%	79	229	18.5%	7.6%
Total	10	Total	44,922	● 1.0	-7.3%	(3,518)	2,023	4.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Stanly County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	38	● 0.6	8.6%	3	(11)	-28.9%	0.2%
Agribusiness & Food	1110	Crop Production	28	○ 0.4	-30.0%	(12)	2	7.1%	-1.2%
Agribusiness & Food	1120	Animal Production	110	● 3.5	32.5%	27	7	6.4%	-1.5%
Agribusiness & Food	1152	Support Activities for Animal Production	10	● 2.7	100.0%	5	2	20.0%	10.0%
Agribusiness & Food	3111	Animal Food Manufacturing	14	● 2.0	-6.7%	(1)	(2)	-14.3%	-1.6%
Agribusiness & Food	3116	Animal Slaughtering and Processing	52	● 0.8	26.8%	11	(2)	-3.8%	2.3%
Agribusiness & Food	3121	Beverage Manufacturing	39	● 1.6	-17.0%	(8)	2	5.1%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	27	○ 0.3	8.0%	2	2	7.4%	6.4%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	80	● 23.8	-72.4%	(210)	(75)	-93.8%	-26.5%
Apparel & Textiles	3132	Fabric Mills	29	● 4.5	-53.2%	(33)	(29)	-100.0%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	70	● 16.5	20.7%	12	(70)	-100.0%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	195	● 29.4	-60.9%	(304)	(33)	-16.9%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	17	● 2.1	30.8%	4	(12)	-70.6%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	18	● 9.9	-48.6%	(17)	(13)	-72.2%	-52.1%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	13	● 0.9	-76.4%	(42)	(8)	-61.5%	-33.6%
Automotive	3363	Motor Vehicle Parts Manufacturing	50	● 0.9	-58.0%	(69)	35	70.0%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	22	● 0.5	-58.5%	(31)	5	22.7%	0.3%
Back Office	5611	Office Administrative Services	26	○ 0.4	136.4%	15	25	96.2%	12.4%
Back Office	5613	Employment Services	207	● 0.5	-18.8%	(48)	20	9.7%	6.0%
Back Office	5614	Business Support Services	75	● 0.7	167.9%	47	15	20.0%	9.4%
Back Office	5616	Investigation and Security Services	29	○ 0.3	20.8%	5	2	6.9%	9.9%
Back Office	5617	Services to Buildings and Dwellings	121	○ 0.5	-49.6%	(119)	3	2.5%	9.8%
Back Office	5619	Other Support Services	56	● 1.5	93.1%	27	22	39.3%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	35	● 0.8	-5.4%	(2)	3	8.6%	3.8%
Building & Construction	2213	Water, Sewage and Other Systems	37	● 5.5	12.1%	4	8	21.6%	9.4%
Building & Construction	2361	Residential Building Construction	148	● 1.9	5.7%	8	28	18.9%	6.4%
Building & Construction	2362	Nonresidential Building Construction	60	● 0.7	-34.8%	(32)	19	31.7%	6.1%
Building & Construction	2371	Utility System Construction	115	● 2.2	-34.3%	(60)	21	18.3%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	12	○ 0.3	-7.7%	(1)	(1)	-8.3%	6.3%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	115	● 1.3	-50.4%	(117)	3	2.6%	4.7%
Building & Construction	2382	Building Equipment Contractors	156	● 0.7	-42.9%	(117)	(30)	-19.2%	8.5%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2383	Building Finishing Contractors	66	● 0.8	-50.0%	(66)	4	6.1%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	198	● 2.7	-17.5%	(42)	78	39.4%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	29	● 2.7	-77.2%	(98)	(24)	-82.8%	-10.3%
Building & Construction	3212	Veneer, Plywood, & Eng. Wood Product Mfg.	64	● 8.2	-55.9%	(81)	15	23.4%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	246	● 9.9	-64.6%	(448)	(125)	-50.8%	-6.4%
Building & Construction	3273	Cement and Concrete Product Manufacturing	55	● 2.4	-11.3%	(7)	9	16.4%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	48	● 5.4		48	33	68.8%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	96	● 3.7	28.0%	21	(1)	-1.0%	4.0%
Building & Construction	4441	Building Material and Supplies Dealers	241	● 1.7	-18.3%	(54)	36	14.9%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	37	● 2.1	37.0%	10	11	29.7%	0.6%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	15	○ 0.3	200.0%	10	4	26.7%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	14	● 0.6	-12.5%	(2)	8	57.1%	1.3%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	99	● 0.7	-16.8%	(20)	8	8.1%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	34	○ 0.1	-48.5%	(32)	(5)	-14.7%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	752	● 1.2	-13.7%	(119)	(27)	-3.6%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	763	● 1.3	13.7%	92	20	2.6%	6.5%
Culture & Entertainment	7223	Special Food Services	89	● 1.2	45.9%	28	9	10.1%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	24	◐ 0.5	380.0%	19	10	41.7%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	50	● 0.5	900.0%	45	19	38.0%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	235	● 1.4	-13.9%	(38)	2	0.9%	11.7%
Education	6116	Other Schools and Instruction (Private)	80	● 1.7	207.7%	54	26	32.5%	16.8%
Electronics	3359	Other Electrical Equipment & Component Mfg.	123	● 7.6	73.2%	52	53	43.1%	-3.0%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	64	● 0.5	-13.5%	(10)	(24)	-37.5%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	14	● 1.1	40.0%	4	6	42.9%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	27	○ 0.5	-18.2%	(6)	(9)	-33.3%	-3.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	22	● 1.4	-4.3%	(1)	2	9.1%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	43	● 3.4	-2.3%	(1)	9	20.9%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	28	○ 0.5	-20.0%	(7)	6	21.4%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	35	● 0.6	-16.7%	(7)	7	20.0%	-10.1%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	11	● 1.0	-71.1%	(27)	(1)	-9.1%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	59	○ 0.3	-11.9%	(8)	7	11.9%	8.0%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5221	Depository Credit Intermediation	266	● 1.1	12.2%	29	16	6.0%	3.4%
Finance	5222	Nondepository Credit Intermediation	29	○ 0.4	11.5%	3	7	24.1%	-2.5%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	17	○ 0.3	240.0%	12	14	82.4%	3.1%
Finance	5241	Insurance Carriers	35	○ 0.2	600.0%	30	9	25.7%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	136	● 1.1	76.6%	59	39	28.7%	7.6%
Finance	5311	Lessors of Real Estate	13	○ 0.2	0.0%	0	3	23.1%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	12	○ 0.3	-47.8%	(11)	(7)	-58.3%	5.2%
Finance	5313	Activities Related to Real Estate	11	○ 0.1	120.0%	6	0	0.0%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	105	● 3.7	-50.2%	(106)	(67)	-63.8%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	55	● 4.4	-73.7%	(154)	(45)	-81.8%	-5.8%
Government	9011	Federal Government, Civilian	167	○ 0.4	2.5%	4	3	1.8%	1.4%
Government	9012	Federal Government, Military	155	● 0.5	0.6%	1	1	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	532	● 1.4	19.3%	86	(13)	-2.4%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	636	● 2.0	-3.5%	(23)	(8)	-1.3%	3.8%
Government	9036	Education and Hospitals (Local Government)	1,320	● 1.1	-11.3%	(168)	80	6.1%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	932	● 1.2	-0.7%	(7)	60	6.4%	4.8%
Healthcare	6211	Offices of Physicians	263	● 0.8	-1.5%	(4)	45	17.1%	14.0%
Healthcare	6212	Offices of Dentists	90	● 0.8	11.1%	9	12	13.3%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	55	● 0.6	111.5%	29	22	40.0%	17.6%
Healthcare	6214	Outpatient Care Centers	38	○ 0.4	58.3%	14	12	31.6%	15.1%
Healthcare	6216	Home Health Care Services	277	● 1.7	62.0%	106	69	24.9%	19.8%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	733	● 1.2	144.3%	433	172	23.5%	6.6%
Healthcare	6223	Specialty Hospitals (Private)	17	● 0.6	-95.7%	(378)	25	147.1%	14.7%
Healthcare	6231	Nursing Care Facilities	405	● 1.7	4.4%	17	71	17.5%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	215	● 2.6	0.9%	2	18	8.4%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	310	● 2.8	-3.4%	(11)	11	3.5%	12.4%
Healthcare	6241	Individual and Family Services	211	● 1.2	75.8%	91	72	34.1%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	102	● 5.0	36.0%	27	70	68.6%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	64	● 1.4	-14.7%	(11)	13	20.3%	10.1%
Healthcare	6244	Child Day Care Services	325	● 3.0	-0.6%	(2)	23	7.1%	8.7%
Industrial Machinery	3332	Industrial Machinery Manufacturing	11	● 0.8		11	(6)	-54.5%	-13.2%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	3335	Metalworking Machinery Manufacturing	23	● 1.1	76.9%	10	10	43.5%	-4.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	98	● 3.1	197.0%	65	(2)	-2.0%	-4.5%
Industrial Machinery	3353	Electrical Equipment Manufacturing	20	● 1.1	-39.4%	(13)	(6)	-30.0%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	26	○ 0.3	-55.2%	(32)	(6)	-23.1%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	84	● 1.0	-19.2%	(20)	5	6.0%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	31	● 0.8	-44.6%	(25)	(3)	-9.7%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	43	● 1.7	-46.3%	(37)	(8)	-18.6%	3.3%
Logging & Metal/Mineral Mining	1133	Logging	24	● 3.8	0.0%	0	0	0.0%	-4.2%
Logging & Metal/Mineral Mining	2123	Nonmetallic Mineral Mining and Quarrying	15	● 1.3	-34.8%	(8)	0	0.0%	-2.9%
Materials	3261	Plastics Product Manufacturing	120	● 1.8	-4.8%	(6)	3	2.5%	-4.9%
Materials	3262	Rubber Product Manufacturing	549	● 34.5	-9.6%	(58)	(52)	-9.5%	-8.6%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	61	● 8.0	258.8%	44	10	16.4%	-4.0%
Metalworking	3313	Alumina and Aluminum Production and Processing	24	● 3.2	-83.1%	(118)	(19)	-79.2%	-8.5%
Metalworking	3323	Architectural and Structural Metals Manufacturing	50	● 1.1	-41.9%	(36)	11	22.0%	1.9%
Metalworking	3324	Boiler, Tank, and Shipping Container Manufacturing	42	● 3.5	740.0%	37	(3)	-7.1%	-5.3%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	131	● 2.9	-25.1%	(44)	(21)	-16.0%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	35	● 2.1	250.0%	25	(7)	-20.0%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	20	● 0.6	81.8%	9	4	20.0%	-5.4%
Non-Profits	8134	Civic and Social Organizations	185	● 3.4	0.5%	1	41	22.2%	5.6%
Professional Services	5411	Legal Services	56	○ 0.4	12.0%	6	0	0.0%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	70	● 0.5	-31.4%	(32)	(5)	-7.1%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	65	● 0.8	30.0%	15	16	24.6%	8.5%
Professional Services	5511	Management of Companies and Enterprises	202	● 0.8	47.4%	65	40	19.8%	3.1%
Research	5417	Scientific Research and Development Services	23	○ 0.3		23	11	47.8%	9.8%
Retail	4411	Automobile Dealers	115	● 0.8	-64.4%	(208)	1	0.9%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	67	● 3.7	81.1%	30	30	44.8%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	112	● 1.6	21.7%	20	19	17.0%	1.0%
Retail	4421	Furniture Stores	82	● 2.8	228.0%	57	45	54.9%	1.6%
Retail	4431	Electronics and Appliance Stores	38	● 0.6	8.6%	3	(8)	-21.1%	2.9%
Retail	4451	Grocery Stores	437	● 1.3	-2.0%	(9)	(33)	-7.6%	2.3%
Retail	4452	Specialty Food Stores	22	● 0.8	-8.3%	(2)	(2)	-9.1%	-4.9%

Stanly County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4461	Health and Personal Care Stores	176	● 1.3	5.4%	9	18	10.2%	6.6%
Retail	4471	Gasoline Stations	281	● 2.5	10.2%	26	(12)	-4.3%	-2.3%
Retail	4481	Clothing Stores	39	○ 0.3	-7.1%	(3)	2	5.1%	3.6%
Retail	4482	Shoe Stores	12	○ 0.4	-36.8%	(7)	(7)	-58.3%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	15	● 0.8	-34.8%	(8)	(10)	-66.7%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	67	● 1.0	63.4%	26	15	22.4%	4.9%
Retail	4512	Book, Periodical, and Music Stores	15	● 0.9	-28.6%	(6)	(1)	-6.7%	-10.2%
Retail	4521	Department Stores	84	○ 0.4	-8.7%	(8)	(12)	-14.3%	-3.3%
Retail	4529	Other General Merchandise Stores	804	● 3.7	79.1%	355	273	34.0%	15.1%
Retail	4531	Florists	11	● 1.2	-8.3%	(1)	0	0.0%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	15	○ 0.4	-50.0%	(15)	(2)	-13.3%	-7.1%
Retail	4539	Other Miscellaneous Store Retailers	34	● 0.9	47.8%	11	(6)	-17.6%	2.2%
Retail	4543	Direct Selling Establishments	31	● 1.8	82.4%	14	(5)	-16.1%	-6.7%
Retail	5322	Consumer Goods Rental	47	● 1.9	-37.3%	(28)	(5)	-10.6%	-1.0%
Retail	5323	General Rental Centers	20	● 3.7	300.0%	15	10	50.0%	-0.9%
Retail	8111	Automotive Repair and Maintenance	158	● 1.4	10.5%	15	48	30.4%	4.0%
Retail	8121	Personal Care Services	35	○ 0.4	-22.2%	(10)	6	17.1%	11.4%
Retail	8122	Death Care Services	62	● 3.4	6.9%	4	7	11.3%	1.2%
Retail	8123	Drycleaning and Laundry Services	13	○ 0.3	-48.0%	(12)	(2)	-15.4%	-0.8%
Retail	8129	Other Personal Services	18	● 0.5	-14.3%	(3)	(6)	-33.3%	6.0%
Retail	8141	Private Households	35	○ 0.4	52.2%	12	8	22.9%	13.6%
Software / Info. Tech.	5191	Other Information Services	10	○ 0.4	100.0%	5	4	40.0%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	16	○ 0.1	-11.1%	(2)	2	12.5%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	38	○ 0.5	26.7%	8	9	23.7%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	15	● 0.7		15	6	40.0%	5.1%
Transportation & Logistics	4821	Rail Transportation	29	● 0.9	-12.1%	(4)	2	6.9%	0.3%
Transportation & Logistics	4841	General Freight Trucking	14	○ 0.1	-84.4%	(76)	(9)	-64.3%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	11	○ 0.2	120.0%	6	0	0.0%	4.9%
Transportation & Logistics	4881	Support Activities for Air Transportation	11	○ 0.5	-65.6%	(21)	0	0.0%	10.7%
Total	10	Total	18,327	● 1.0	-9.3%	(1,890)	1,201	6.6%	5.2%

Source: Avalanche Consulting using data from EMSI

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	81	6.3	189.3%	53	24	29.6%	0.2%
Agribusiness & Food	1110	Crop Production	263	1.6	16.9%	38	85	32.3%	-1.2%
Agribusiness & Food	1120	Animal Production	221	37.4	-41.7%	(158)	(74)	-33.5%	-1.5%
Agribusiness & Food	1151	Support Activities for Crop Production	169	5.8	103.6%	86	0	0.0%	4.2%
Agribusiness & Food	1152	Support Activities for Animal Production	26	13.2	44.4%	8	6	23.1%	10.0%
Agribusiness & Food	3111	Animal Food Manufacturing	80	1.6	25.0%	16	(13)	-16.3%	-1.6%
Agribusiness & Food	3115	Dairy Product Manufacturing	39	0.3		39	6	15.4%	1.1%
Agribusiness & Food	3116	Animal Slaughtering and Processing	1,742	0.4	-10.9%	(214)	(256)	-14.7%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	20	0.5	300.0%	15	4	20.0%	-1.0%
Agribusiness & Food	3121	Beverage Manufacturing	13	4.5	-43.5%	(10)	(8)	-61.5%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	299	8.0	27.2%	64	141	47.2%	6.4%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	44	0.9	-34.3%	(23)	(39)	-88.6%	-26.5%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	62	0.7	-76.0%	(196)	(62)	-100.0%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	119	1.0	-66.9%	(240)	(114)	-95.8%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	28	49.4	-3.4%	(1)	(23)	-82.1%	-6.4%
Apparel & Textiles	3159	Apparel Accessories & Other Apparel Mfg.	130	1.9	-26.6%	(47)	(92)	-70.8%	-7.4%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	142	107.8	3.6%	5	2	1.4%	-3.0%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	36	4.9	-54.4%	(43)	6	16.7%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	161	58.7	120.5%	88	118	73.3%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	25	0.9	-35.9%	(14)	(1)	-4.0%	0.3%
Back Office	5611	Office Administrative Services	194	0.5	43.7%	59	96	49.5%	12.4%
Back Office	5613	Employment Services	463	3.4	-28.9%	(188)	(23)	-5.0%	6.0%
Back Office	5614	Business Support Services	66	0.5	53.5%	23	15	22.7%	9.4%
Back Office	5616	Investigation and Security Services	51	0.4	-61.1%	(80)	2	3.9%	9.9%
Back Office	5617	Services to Buildings and Dwellings	1,750	0.7	7.1%	116	643	36.7%	9.8%
Back Office	5619	Other Support Services	221	1.4	12.8%	25	87	39.4%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	679	0.8	2.9%	19	57	8.4%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	30	1.1	500.0%	25	10	33.3%	9.6%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	82	0.5	1540.0%	77	14	17.1%	16.3%
Building & Construction	2361	Residential Building Construction	399	0.7	-44.7%	(323)	50	12.5%	6.4%
Building & Construction	2362	Nonresidential Building Construction	361	0.3	-35.1%	(195)	35	9.7%	6.1%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2371	Utility System Construction	214	1.6	-67.0%	(435)	(27)	-12.6%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	362	0.9	-23.3%	(110)	207	57.2%	6.3%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	1,064	0.6	-59.4%	(1,556)	(265)	-24.9%	4.7%
Building & Construction	2382	Building Equipment Contractors	1,706	0.5	-34.6%	(901)	178	10.4%	8.5%
Building & Construction	2383	Building Finishing Contractors	627	0.7	-38.8%	(398)	117	18.7%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	257	0.4	-62.2%	(423)	(95)	-37.0%	7.7%
Building & Construction	3212	Veneer, Plywood, & Eng. Wood Product Mfg.	74	1.1	-63.2%	(127)	7	9.5%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	391	2.1	-52.1%	(426)	81	20.7%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	44	1.1	-76.1%	(140)	(39)	-88.6%	-7.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	56	1.8	-21.1%	(15)	10	17.9%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	30	0.6	-67.4%	(62)	7	23.3%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	81	0.4	-37.2%	(48)	6	7.4%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	267	0.4	-8.2%	(24)	(19)	-7.1%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	618	0.6	-3.1%	(20)	124	20.1%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	75	1.1	-44.4%	(60)	(12)	-16.0%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	70	3.5	-39.7%	(46)	(20)	-28.6%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	179	0.6	-1.1%	(2)	18	10.1%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	21	1.5	90.9%	10	9	42.9%	1.3%
Culture & Entertainment	7112	Spectator Sports	24	0.8	380.0%	19	17	70.8%	7.3%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	17	0.8	0.0%	0	5	29.4%	8.8%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	405	1.1	-26.4%	(145)	54	13.3%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	126	27.1	-14.3%	(21)	1	0.8%	3.2%
Culture & Entertainment	7212	RV Parks and Recreational Camps	11	8.6		11	8	72.7%	10.3%
Culture & Entertainment	7221	Full-Service Restaurants	1,328	18.0	-6.1%	(87)	(34)	-2.6%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	2,299	1.7	20.1%	385	200	8.7%	6.5%
Culture & Entertainment	7223	Special Food Services	111	95.2	60.9%	42	25	22.5%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	89	21.9	1680.0%	84	30	33.7%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	282	3.5	422.2%	228	85	30.1%	13.4%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	440	3.9	-10.6%	(52)	32	7.3%	11.7%
Education	6116	Other Schools and Instruction (Private)	74	2.2	-80.1%	(298)	(17)	-23.0%	16.8%
Education	6117	Educational Support Services (Private)	43	0.5	-32.8%	(21)	(7)	-16.3%	23.6%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Electronics	3342	Communications Equipment Manufacturing	45	○ 0.4		45	14	31.1%	-8.5%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	185	○ 0.4	13.5%	22	32	17.3%	-0.4%
Electronics	3359	Other Electrical Equipment & Component Mfg.	111	○ 0.2	30.6%	26	69	62.2%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	113	◐ 1.0	21.5%	20	22	19.5%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	553	◑ 1.6	5.1%	27	42	7.6%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	23	◒ 0.9	4.5%	1	9	39.1%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	74	◓ 1.8	-17.8%	(16)	(12)	-16.2%	-3.7%
Energy	2212	Natural Gas Distribution	96	◔ 0.6	-9.4%	(10)	14	14.6%	0.7%
Energy	3241	Petroleum and Coal Products Manufacturing	76	◕ 2.7	-52.2%	(83)	(59)	-77.6%	-4.5%
Energy	4235	Metal and Mineral Merchant Wholesalers	53	◖ 1.0	17.8%	8	(8)	-15.1%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	101	◗ 1.9	119.6%	55	41	40.6%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	208	◘ 1.6	-31.4%	(95)	21	10.1%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	101	○ 0.4	-14.4%	(17)	25	24.8%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	29	◙ 2.9	3.6%	1	2	6.9%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	28	◚ 1.5	-6.7%	(2)	0	0.0%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	26	◛ 0.6	-51.9%	(28)	(3)	-11.5%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	225	◜ 1.2	-43.2%	(171)	(9)	-4.0%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	35	◝ 1.4	66.7%	14	9	25.7%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	47	◞ 17.1	0.0%	0	(1)	-2.1%	3.0%
Finance	5221	Depository Credit Intermediation	404	◟ 0.7	6.0%	23	60	14.9%	3.4%
Finance	5222	Nondepository Credit Intermediation	102	◠ 5.1	-71.0%	(250)	(30)	-29.4%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	33	◡ 1.8	3.1%	1	9	27.3%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	29	◢ 2.4	70.6%	12	12	41.4%	3.1%
Finance	5239	Other Financial Investment Activities	57	○ 0.2	-6.6%	(4)	14	24.6%	6.8%
Finance	5241	Insurance Carriers	14	◣ 0.9	-71.4%	(35)	(9)	-64.3%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	182	◤ 4.4	25.5%	37	32	17.6%	7.6%
Finance	5251	Insurance and Employee Benefit Funds	17	◥ 4.8		17	0	0.0%	5.0%
Finance	5311	Lessors of Real Estate	63	◦ 5.4	-3.1%	(2)	8	12.7%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	86	◐ 0.9	-32.3%	(41)	26	30.2%	5.2%
Finance	5313	Activities Related to Real Estate	85	◑ 17.9	26.9%	18	23	27.1%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	222	◒ 39.2	-53.7%	(257)	(52)	-23.4%	-4.3%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	56	● 119.4	-1.8%	(1)	(26)	-46.4%	-5.8%
Furniture	3379	Other Furniture Related Product Manufacturing	13	● 3.6		13	(8)	-61.5%	-6.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	30	● 9.2	3.4%	1	5	16.7%	1.6%
Government	5621	Waste Collection	161	● 6.6	-5.8%	(10)	16	9.9%	8.7%
Government	9011	Federal Government, Civilian	283	● 1.7	11.0%	28	9	3.2%	1.4%
Government	9012	Federal Government, Military	472	● 3.6	-0.4%	(2)	2	0.4%	0.8%
Government	9026	Education and Hospitals (State Government)	307	○ 0.2	28.5%	68	3	1.0%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	341	◐ 1.1	-19.2%	(81)	7	2.1%	3.8%
Government	9036	Education and Hospitals (Local Government)	6,637	● 9.8	1.4%	92	591	8.9%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	2,401	● 7.9	6.9%	156	241	10.0%	4.8%
Healthcare	6211	Offices of Physicians	469	◐ 0.8	4.5%	20	104	22.2%	14.0%
Healthcare	6212	Offices of Dentists	281	○ 0.5	51.1%	95	109	38.8%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	225	◐ 0.6	64.2%	88	83	36.9%	17.6%
Healthcare	6214	Outpatient Care Centers	120	● 1.9	-62.3%	(198)	12	10.0%	15.1%
Healthcare	6216	Home Health Care Services	359	○ 0.5	36.5%	96	119	33.1%	19.8%
Healthcare	6231	Nursing Care Facilities	697	● 2.3	29.8%	160	157	22.5%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	63	● 52.5	-39.4%	(41)	10	15.9%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	310	● 2.3	53.5%	108	52	16.8%	12.4%
Healthcare	6239	Other Residential Care Facilities	32	● 6.1	-70.9%	(78)	(5)	-15.6%	8.8%
Healthcare	6241	Individual and Family Services	217	◐ 1.4	27.6%	47	83	38.2%	19.5%
Healthcare	6243	Vocational Rehabilitation Services	117	● 1.8	-12.7%	(17)	24	20.5%	10.1%
Healthcare	6244	Child Day Care Services	563	◐ 0.7	2.4%	13	123	21.8%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	74	● 11.8	-28.2%	(29)	0	0.0%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	162	● 65.7	-54.0%	(190)	(127)	-78.4%	-13.2%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	16	● 3.4	33.3%	4	6	37.5%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	77	○ 0.3	83.3%	35	28	36.4%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	104	○ 0.4	0.0%	0	20	19.2%	-4.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	232	◐ 0.9	37.3%	63	9	3.9%	-4.5%
Industrial Machinery	3353	Electrical Equipment Manufacturing	74	● 2.4	7.2%	5	(61)	-82.4%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	147	● 1.7	-16.0%	(28)	10	6.8%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	441	◐ 0.6	-29.3%	(183)	(18)	-4.1%	2.1%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	229	1.6	-13.3%	(35)	14	6.1%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	117	5.8	-26.4%	(42)	3	2.6%	3.3%
Logging & Metal/Mineral Mi	1131	Timber Tract Operations	46	1.1	43.8%	14	2	4.3%	-0.1%
Materials	3222	Converted Paper Product Manufacturing	48	1.0	-59.3%	(70)	(21)	-43.8%	-10.3%
Materials	3251	Basic Chemical Manufacturing	55	2.6	1000.0%	50	10	18.2%	-11.0%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	72	0.7	-2.7%	(2)	(19)	-26.4%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	144	4.5	-19.6%	(35)	(53)	-36.8%	-3.2%
Materials	3261	Plastics Product Manufacturing	977	0.5	-10.8%	(118)	(61)	-6.2%	-4.9%
Materials	3262	Rubber Product Manufacturing	18	1.4	-71.9%	(46)	(13)	-72.2%	-8.6%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	88	0.8	10.0%	8	16	18.2%	-2.6%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	20	1.9	-78.5%	(73)	(9)	-45.0%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	11	1.9	120.0%	6	(6)	-54.5%	-4.0%
Metalworking	3314	Nonferrous Metal Production and Processing	1,226	1.4	10.2%	113	64	5.2%	-7.7%
Metalworking	3315	Foundries	116	0.7	-73.6%	(324)	(55)	-47.4%	-11.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	74	0.8	23.3%	14	15	20.3%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	234	0.7	-33.5%	(118)	(26)	-11.1%	1.9%
Metalworking	3325	Hardware Manufacturing	187	0.4	-47.3%	(168)	(68)	-36.4%	-12.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	185	1.1	-40.5%	(126)	(16)	-8.6%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	24	2.3	-29.4%	(10)	(12)	-50.0%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	281	0.9	21.6%	50	70	24.9%	-5.4%
Non-Profits	8132	Grantmaking and Giving Services	19	2.2	280.0%	14	10	52.6%	6.9%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	42	1.0	7.7%	3	24	57.1%	6.6%
Professional Services	5411	Legal Services	135	7.6	-0.7%	(1)	11	8.1%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	154	1.1	-11.0%	(19)	(4)	-2.6%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	231	1.7	41.7%	68	23	10.0%	8.5%
Professional Services	5511	Management of Companies and Enterprises	77	6.5	5.5%	4	8	10.4%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	290	0.8	114.8%	155	109	37.6%	28.1%
Retail	4411	Automobile Dealers	548	0.6	9.6%	48	77	14.1%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	67	1.3	-40.2%	(45)	(2)	-3.0%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	330	2.1	11.5%	34	59	17.9%	1.0%
Retail	4421	Furniture Stores	46	14.2	-27.0%	(17)	(3)	-6.5%	1.6%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4422	Home Furnishings Stores	41	● 19.3	-24.1%	(13)	(4)	-9.8%	2.6%
Retail	4431	Electronics and Appliance Stores	195	● 4.2	7.7%	14	23	11.8%	2.9%
Retail	4451	Grocery Stores	1,113	◐ 0.9	1.5%	16	59	5.3%	2.3%
Retail	4452	Specialty Food Stores	49	◐ 1.4	-12.5%	(7)	(6)	-12.2%	-4.9%
Retail	4461	Health and Personal Care Stores	463	● 30.2	26.2%	96	100	21.6%	6.6%
Retail	4471	Gasoline Stations	361	● 53.7	5.9%	20	8	2.2%	-2.3%
Retail	4481	Clothing Stores	151	◐ 0.6	-34.3%	(79)	26	17.2%	3.6%
Retail	4482	Shoe Stores	72	● 35.5	30.9%	17	15	20.8%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	24	● 7.6	-11.1%	(3)	(7)	-29.2%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	81	● 109.4	19.1%	13	0	0.0%	4.9%
Retail	4512	Book, Periodical, and Music Stores	51	● 5.1	24.4%	10	(26)	-51.0%	-10.2%
Retail	4521	Department Stores	580	○ 0.3	33.6%	146	96	16.6%	-3.3%
Retail	4529	Other General Merchandise Stores	1,052	○ 0.4	11.0%	104	212	20.2%	15.1%
Retail	4531	Florists	22	◐ 0.5	-47.6%	(20)	(2)	-9.1%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	96	○ 0.5	6.7%	6	(8)	-8.3%	-7.1%
Retail	4533	Used Merchandise Stores	31	● 2.1	10.7%	3	(4)	-12.9%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	65	● 3.1	-25.3%	(22)	(7)	-10.8%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	93	● 1.7	745.5%	82	13	14.0%	6.3%
Retail	4542	Vending Machine Operators	73	○ 0.4	30.4%	17	5	6.8%	-0.7%
Retail	4543	Direct Selling Establishments	38	● 2.1	65.2%	15	(14)	-36.8%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	16	● 6.7	-36.0%	(9)	0	0.0%	2.5%
Retail	5322	Consumer Goods Rental	61	● 6.2	-21.8%	(17)	0	0.0%	-1.0%
Retail	5323	General Rental Centers	15	● 2.1	-54.5%	(18)	8	53.3%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	23	● 3.5	-46.5%	(20)	1	4.3%	0.9%
Retail	8111	Automotive Repair and Maintenance	504	○ 0.4	14.5%	64	145	28.8%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	34	● 4.0	-2.9%	(1)	11	32.4%	-2.2%
Retail	8121	Personal Care Services	150	● 7.9	-25.7%	(52)	14	9.3%	11.4%
Retail	8122	Death Care Services	64	◐ 1.1	-8.6%	(6)	3	4.7%	1.2%
Retail	8123	Drycleaning and Laundry Services	177	◐ 0.7	-25.6%	(61)	28	15.8%	-0.8%
Retail	8129	Other Personal Services	107	○ 0.3	48.6%	35	25	23.4%	6.0%
Retail	8141	Private Households	63	● 3.1	-8.7%	(6)	(1)	-1.6%	13.6%

Union County, NC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	41	0.8	-12.8%	(6)	1	2.4%	15.6%
Software / Info. Tech.	5191	Other Information Services	25	1.8	92.3%	12	8	32.0%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	262	1.0	20.7%	45	37	14.1%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	318	2.8	457.9%	261	170	53.5%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	30	0.9	15.4%	4	0	0.0%	5.1%
Telecom Services	5179	Other Telecommunications	27	10.3	440.0%	22	27	100.0%	-4.3%
Transportation & Logistics	4812	Nonscheduled Air Transportation	13	23.0	160.0%	8	(8)	-61.5%	7.0%
Transportation & Logistics	4821	Rail Transportation	37	1.6	-9.8%	(4)	1	2.7%	0.3%
Transportation & Logistics	4841	General Freight Trucking	366	21.0	8.0%	27	17	4.6%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	188	11.9	-16.4%	(37)	15	8.0%	4.9%
Transportation & Logistics	4881	Support Activities for Air Transportation	25	0.3	66.7%	10	(2)	-8.0%	10.7%
Transportation & Logistics	4884	Support Activities for Road Transportation	71	20.9	47.9%	23	43	60.6%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	37	64.8	60.9%	14	10	27.0%	4.4%
Transportation & Logistics	4921	Couriers and Express Delivery Services	155	10.9	58.2%	57	24	15.5%	1.9%
Transportation & Logistics	4931	Warehousing and Storage	359	10.3	-18.0%	(79)	(15)	-4.2%	7.6%
Total	10	Total	52,376	68.1	-11.2%	(6,602)	4,456	8.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Chester County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	3115	Dairy Product Manufacturing	13	● 1.7	-55.2%	(16)	2	15.4%	1.1%
Agribusiness & Food	3253	Pesticide, Fertilizer, & Other Ag. Chemical Mfg.	84	● 39.5	250.0%	60	20	23.8%	1.6%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	263	● 6.1	1.9%	5	20	7.6%	6.4%
Apparel & Textiles	3141	Textile Furnishings Mills	40	● 14.0	-88.3%	(303)	(40)	-100.0%	-26.4%
Back Office	5612	Facilities Support Services	15	● 1.7		15	1	6.7%	14.8%
Back Office	5617	Services to Buildings and Dwellings	37	○ 0.3	-68.1%	(79)	(17)	-45.9%	9.8%
Building & Construction	2362	Nonresidential Building Construction	15	○ 0.4	-28.6%	(6)	1	6.7%	6.1%
Building & Construction	2371	Utility System Construction	11	○ 0.5	-89.8%	(97)	(6)	-54.5%	4.6%
Building & Construction	2372	Land Subdivision	13	● 4.8	-45.8%	(11)	8	61.5%	-4.2%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	48	● 8.4	269.2%	35	13	27.1%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	37	◐ 0.9	-24.5%	(12)	10	27.0%	4.7%
Building & Construction	2382	Building Equipment Contractors	75	◑ 0.8	-72.9%	(202)	(7)	-9.3%	8.5%
Building & Construction	2389	Other Specialty Trade Contractors	32	◒ 1.0	3.2%	1	(5)	-15.6%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	240	● 52.1	33.3%	60	(8)	-3.3%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	21	● 2.0	-32.3%	(10)	(16)	-76.2%	-6.4%
Building & Construction	3272	Glass and Glass Product Manufacturing	495	● 113.8	-27.0%	(183)	(104)	-21.0%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	50	● 5.1	19.0%	8	47	94.0%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	238	● 61.9	-1.7%	(4)	17	7.1%	1.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	12	◑ 0.9		12	3	25.0%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	29	○ 0.5	3.6%	1	(5)	-17.2%	4.9%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	68	● 3.6	-2.9%	(2)	14	20.6%	-0.4%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	34	◑ 0.5	-19.0%	(8)	8	23.5%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	38	○ 0.4	-19.1%	(9)	(9)	-23.7%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	205	◑ 0.8	-4.2%	(9)	6	2.9%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	373	◒ 1.5	-5.8%	(23)	20	5.4%	6.5%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	44	◑ 0.9	-15.4%	(8)	(6)	-13.6%	14.4%
Energy	2211	Electric Power Gen., Transmission & Distribution	27	◑ 1.2	170.0%	17	(22)	-81.5%	-3.7%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	14	◑ 0.5	180.0%	9	(9)	-64.3%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	21	◑ 0.8	-4.5%	(1)	2	9.5%	-10.1%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	28	○ 0.4	47.4%	9	3	10.7%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	12	● 1.7	140.0%	7	4	33.3%	13.8%

Chester County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5221	Depository Credit Intermediation	103	1.0	6.2%	6	10	9.7%	3.4%
Finance	5222	Nondepository Credit Intermediation	21	0.7	-16.0%	(4)	3	14.3%	-2.5%
Finance	5239	Other Financial Investment Activities	11	0.5	-21.4%	(3)	(6)	-54.5%	6.8%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	39	0.7	5.4%	2	6	15.4%	7.6%
Government	9011	Federal Government, Civilian	72	0.4	10.8%	7	(5)	-6.9%	1.4%
Government	9012	Federal Government, Military	138	1.1	1.5%	2	1	0.7%	0.8%
Government	9029	State Government, Excluding Education & Hospitals	299	2.2	-4.5%	(14)	(18)	-6.0%	3.8%
Government	9036	Education and Hospitals (Local Government)	586	1.2	-31.1%	(264)	(35)	-6.0%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	622	1.9	3.3%	20	(35)	-5.6%	4.8%
Healthcare	6211	Offices of Physicians	100	0.7	-16.7%	(20)	9	9.0%	14.0%
Healthcare	6212	Offices of Dentists	24	0.5	-35.1%	(13)	(5)	-20.8%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	16	0.4	220.0%	11	4	25.0%	17.6%
Healthcare	6216	Home Health Care Services	43	0.6		43	(1)	-2.3%	19.8%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	312	1.2	-3.4%	(11)	93	29.8%	6.6%
Healthcare	6223	Specialty Hospitals (Private)	48	3.7		48	(28)	-58.3%	14.7%
Healthcare	6241	Individual and Family Services	46	0.6	100.0%	23	6	13.0%	19.5%
Healthcare	6244	Child Day Care Services	76	1.6	-32.1%	(36)	(2)	-2.6%	8.7%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	29	0.8	-34.1%	(15)	7	24.1%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	14	0.8	-62.2%	(23)	(9)	-64.3%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	12	1.1	140.0%	7	1	8.3%	3.3%
Logging & Metal/Mineral Mi	1133	Logging	78	28.6	50.0%	26	0	0.0%	-4.2%
Materials	3222	Converted Paper Product Manufacturing	146	9.1	-3.3%	(5)	3	2.1%	-10.3%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	97	19.0	-30.7%	(43)	(19)	-19.6%	-6.9%
Materials	3261	Plastics Product Manufacturing	52	1.8	940.0%	47	6	11.5%	-4.9%
Metalworking	3314	Nonferrous Metal Production and Processing	352	100.5	-40.3%	(238)	(15)	-4.3%	-7.7%
Metalworking	3321	Forging and Stamping	122	23.1	31.2%	29	(51)	-41.8%	-8.8%
Metalworking	3323	Architectural and Structural Metals Manufacturing	71	3.7	-59.9%	(106)	(51)	-71.8%	1.9%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	30	4.1	150.0%	18	24	80.0%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	34	2.3	580.0%	29	17	50.0%	-5.4%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	14	0.6	180.0%	9	6	42.9%	6.6%
Professional Services	5411	Legal Services	26	0.4	-16.1%	(5)	1	3.8%	6.5%

Chester County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	23	○ 0.4	15.0%	3	0	0.0%	7.2%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	15	○ 0.2	25.0%	3	7	46.7%	28.1%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	32	◐ 1.1	-51.5%	(34)	(4)	-12.5%	1.0%
Retail	4421	Furniture Stores	21	● 1.7	5.0%	1	2	9.5%	1.6%
Retail	4422	Home Furnishings Stores	12	◐ 0.9	140.0%	7	4	33.3%	2.6%
Retail	4451	Grocery Stores	284	● 1.9	-1.7%	(5)	(37)	-13.0%	2.3%
Retail	4461	Health and Personal Care Stores	39	◐ 0.7	8.3%	3	5	12.8%	6.6%
Retail	4471	Gasoline Stations	136	● 2.8	-9.9%	(15)	5	3.7%	-2.3%
Retail	4481	Clothing Stores	67	◐ 1.0	76.3%	29	44	65.7%	3.6%
Retail	4529	Other General Merchandise Stores	189	● 2.0	13.2%	22	(14)	-7.4%	15.1%
Retail	4543	Direct Selling Establishments	13	● 1.7	160.0%	8	7	53.8%	-6.7%
Retail	8111	Automotive Repair and Maintenance	20	○ 0.4	-45.9%	(17)	(3)	-15.0%	4.0%
Retail	8122	Death Care Services	24	● 3.1	-20.0%	(6)	2	8.3%	1.2%
Retail	8123	Drycleaning and Laundry Services	28	◐ 1.6	-24.3%	(9)	(7)	-25.0%	-0.8%
Retail	8129	Other Personal Services	10	◐ 0.7	100.0%	5	2	20.0%	6.0%
Retail	8141	Private Households	51	◐ 1.3	121.7%	28	19	37.3%	13.6%
Shipbuilding	3366	Ship and Boat Building	11	◐ 1.5	120.0%	6	(6)	-54.5%	-6.0%
Telecom Services	5179	Other Telecommunications	113	● 18.0	7.6%	8	(81)	-71.7%	-4.3%
Transportation & Logistics	4821	Rail Transportation	10	◐ 0.7	-9.1%	(1)	1	10.0%	0.3%
Transportation & Logistics	4841	General Freight Trucking	285	● 5.4	179.4%	183	96	33.7%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	45	● 1.9	-39.2%	(29)	(3)	-6.7%	4.9%
Transportation & Logistics	4884	Support Activities for Road Transportation	13	● 2.5	160.0%	8	3	23.1%	11.1%
Transportation & Logistics	4931	Warehousing and Storage	10	○ 0.3	-64.3%	(18)	2	20.0%	7.6%
Total	10	Total	7,900	● 1.0	-19.8%	(1,948)	(102)	-1.3%	5.2%

Source: Avalanche Consulting using data from EMSI

Chesterfield County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	132	● 2.7		132	65	49.2%	0.2%
Agribusiness & Food	1110	Crop Production	157	● 3.0	52.4%	54	0	0.0%	-1.2%
Agribusiness & Food	1120	Animal Production	77	● 3.4	0.0%	0	(19)	-24.7%	-1.5%
Agribusiness & Food	3116	Animal Slaughtering and Processing	28	◐ 0.6	64.7%	11	(1)	-3.6%	2.3%
Agribusiness & Food	3121	Beverage Manufacturing	193	● 11.2	0.0%	0	10	5.2%	0.9%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	60	● 24.5	-79.5%	(233)	(55)	-91.7%	-26.5%
Apparel & Textiles	3132	Fabric Mills	352	● 74.7	-18.3%	(79)	(327)	-92.9%	-34.2%
Apparel & Textiles	3149	Other Textile Product Mills	13	● 2.3	-31.6%	(6)	(8)	-61.5%	-6.4%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	63	● 5.8	-80.1%	(254)	(42)	-66.7%	-33.6%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	57	● 4.2	-8.1%	(5)	(8)	-14.0%	-3.0%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	33	● 1.1	13.8%	4	10	30.3%	0.3%
Back Office	5612	Facilities Support Services	34	● 2.3		34	12	35.3%	14.8%
Back Office	5613	Employment Services	30	○ 0.1	-31.8%	(14)	(25)	-83.3%	6.0%
Back Office	5617	Services to Buildings and Dwellings	124	◐ 0.7	-1.6%	(2)	49	39.5%	9.8%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	188	● 6.1	27.9%	41	0	0.0%	3.8%
Building & Construction	2213	Water, Sewage and Other Systems	24	● 4.9	380.0%	19	7	29.2%	9.4%
Building & Construction	2361	Residential Building Construction	28	○ 0.5	-49.1%	(27)	(7)	-25.0%	6.4%
Building & Construction	2362	Nonresidential Building Construction	20	○ 0.3	300.0%	15	10	50.0%	6.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	26	○ 0.4	-23.5%	(8)	(2)	-7.7%	4.7%
Building & Construction	2382	Building Equipment Contractors	193	● 1.2	22.2%	35	86	44.6%	8.5%
Building & Construction	2383	Building Finishing Contractors	18	○ 0.3	0.0%	0	3	16.7%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	76	● 1.4	-40.2%	(51)	0	0.0%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	255	● 32.8	-25.9%	(89)	0	0.0%	-10.3%
Building & Construction	3219	Other Wood Product Manufacturing	26	● 1.4	420.0%	21	5	19.2%	-6.4%
Building & Construction	3273	Cement and Concrete Product Manufacturing	63	● 3.8	31.3%	15	35	55.6%	3.7%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	16	◐ 0.9	-44.8%	(13)	9	56.3%	4.0%
Building & Construction	4237	Hardware, and Plumbing and Heating Equipment an	25	● 1.1	-21.9%	(7)	17	68.0%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	42	○ 0.4	-26.3%	(15)	(6)	-14.3%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	95	● 7.4	-2.1%	(2)	10	10.5%	0.6%
Consumer Goods Mftg	3352	Household Appliance Manufacturing	221	● 41.1	-34.2%	(115)	(66)	-29.9%	-10.3%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	69	● 2.1	-49.3%	(67)	(3)	-4.3%	-0.4%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7139	Other Amusement and Recreation Industries	20	○ 0.2	-37.5%	(12)	(3)	-15.0%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	41	○ 0.2	-14.6%	(7)	0	0.0%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	263	◐ 0.6	-24.2%	(84)	(26)	-9.9%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	630	● 1.5	1.8%	11	25	4.0%	6.5%
Electronics	4236	Electrical & Electronic Goods Wholesalers	33	● 1.1	-52.2%	(36)	(3)	-9.1%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	32	○ 0.4	10.3%	3	9	28.1%	14.4%
Energy	2211	Electric Power Gen., Transmission & Distribution	39	◐ 1.0	-46.6%	(34)	(9)	-23.1%	-3.7%
Energy	4247	Petroleum and Petroleum Products Wholesalers	33	● 3.6	560.0%	28	8	24.2%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	31	◐ 0.7	121.4%	17	(8)	-25.8%	-10.4%
Finance	5221	Depository Credit Intermediation	104	◐ 0.6	-23.0%	(31)	(5)	-4.8%	3.4%
Finance	5222	Nondepository Credit Intermediation	88	● 1.7	6.0%	5	7	8.0%	-2.5%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	40	○ 0.5	-20.0%	(10)	(17)	-42.5%	7.6%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	58	● 2.8	1060.0%	53	55	94.8%	-4.3%
Government	9011	Federal Government, Civilian	101	○ 0.3	5.2%	5	(4)	-4.0%	1.4%
Government	9012	Federal Government, Military	184	◐ 0.9	2.8%	5	1	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	135	○ 0.5	11.6%	14	1	0.7%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	279	● 1.2	-5.7%	(17)	3	1.1%	3.8%
Government	9036	Education and Hospitals (Local Government)	1,025	● 1.2	-8.2%	(91)	11	1.1%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	474	◐ 0.9	-6.3%	(32)	7	1.5%	4.8%
Healthcare	6211	Offices of Physicians	112	○ 0.5	-29.6%	(47)	(54)	-48.2%	14.0%
Healthcare	6212	Offices of Dentists	42	○ 0.5	5.0%	2	(1)	-2.4%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	33	○ 0.5	-2.9%	(1)	5	15.2%	17.6%
Healthcare	6214	Outpatient Care Centers	16	○ 0.2	6.7%	1	4	25.0%	15.1%
Healthcare	6216	Home Health Care Services	81	◐ 0.7	37.3%	22	5	6.2%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	39	● 1.5	-22.0%	(11)	(5)	-12.8%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	244	◐ 0.5	0.4%	1	(13)	-5.3%	6.6%
Healthcare	6222	Psychiatric and Substance Abuse Hospitals (Private)	14	● 1.3		14	(9)	-64.3%	6.9%
Healthcare	6231	Nursing Care Facilities	110	◐ 0.6	-46.1%	(94)	(21)	-19.1%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	281	● 4.7	4.1%	11	55	19.6%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	53	◐ 0.7	26.2%	11	14	26.4%	12.4%
Healthcare	6241	Individual and Family Services	141	● 1.1	2720.0%	136	70	49.6%	19.5%

Chesterfield County, SC

Detailed Clusters, 4-Digit NAICS















With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Healthcare	6243	Vocational Rehabilitation Services	138	● 4.1	-15.3%	(25)	9	6.5%	10.1%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	30	○ 0.5	500.0%	25	4	13.3%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	22	○ 0.4	29.4%	5	(2)	-9.1%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	24	◐ 0.8	33.3%	6	2	8.3%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	24	● 1.3	-47.8%	(22)	(7)	-29.2%	3.3%
Logging & Metal/Mineral Mii	1133	Logging	41	● 8.9	46.4%	13	2	4.9%	-4.2%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	105	● 12.1	-1.9%	(2)	5	4.8%	-2.9%
Materials	3259	Other Chemical Product & Prep. Mfg.	21	● 2.6	-4.5%	(1)	4	19.0%	-7.6%
Materials	3261	Plastics Product Manufacturing	27	◐ 0.6	-37.2%	(16)	(11)	-40.7%	-4.9%
Materials	3262	Rubber Product Manufacturing	10	◐ 0.9	-88.0%	(73)	(5)	-50.0%	-8.6%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	105	● 18.9	-36.0%	(59)	(15)	-14.3%	-4.0%
Metalworking	3322	Cutlery and Handtool Manufacturing	126	● 33.6	-47.1%	(112)	(99)	-78.6%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	13	○ 0.4	-45.8%	(11)	3	23.1%	1.9%
Metalworking	3324	Boiler, Tank, and Shipping Container Manufacturing	191	● 22.2	-39.7%	(126)	43	22.5%	-5.3%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	154	● 4.7	6.9%	10	16	10.4%	-4.3%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	1,688	● 68.5	-4.4%	(78)	(171)	-10.1%	-5.4%
Non-Profits	8133	Social Advocacy Organizations	64	● 3.2	56.1%	23	(1)	-1.6%	7.4%
Professional Services	5411	Legal Services	22	○ 0.2	-24.1%	(7)	(3)	-13.6%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	25	○ 0.3	0.0%	0	(3)	-12.0%	7.2%
Professional Services	5511	Management of Companies and Enterprises	65	○ 0.3	54.8%	23	(1)	-1.5%	3.1%
Retail	4411	Automobile Dealers	30	○ 0.3	-45.5%	(25)	(15)	-50.0%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	17	● 1.3	-32.0%	(8)	(2)	-11.8%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	98	● 2.0	16.7%	14	5	5.1%	1.0%
Retail	4421	Furniture Stores	23	● 1.1	43.8%	7	1	4.3%	1.6%
Retail	4431	Electronics and Appliance Stores	13	○ 0.3	8.3%	1	6	46.2%	2.9%
Retail	4451	Grocery Stores	320	● 1.3	-11.8%	(43)	(1)	-0.3%	2.3%
Retail	4452	Specialty Food Stores	87	● 4.2	1640.0%	82	23	26.4%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	55	● 3.9	175.0%	35	19	34.5%	1.7%
Retail	4461	Health and Personal Care Stores	128	● 1.3	21.9%	23	30	23.4%	6.6%
Retail	4471	Gasoline Stations	179	● 2.2	29.7%	41	41	22.9%	-2.3%
Retail	4481	Clothing Stores	27	○ 0.2	107.7%	14	5	18.5%	3.6%

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Detailed Clusters, 4-Digit NAICS

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4529	Other General Merchandise Stores	 391	● 2.5	33.0%	97	11	2.8%	15.1%
Retail	4543	Direct Selling Establishments	 63	● 5.0	53.7%	22	23	36.5%	-6.7%
Retail	5322	Consumer Goods Rental	 13	◐ 0.7	-48.0%	(12)	(8)	-61.5%	-1.0%
Retail	8111	Automotive Repair and Maintenance	 35	○ 0.4	-14.6%	(6)	(2)	-5.7%	4.0%
Retail	8121	Personal Care Services	 12	○ 0.2	-7.7%	(1)	3	25.0%	11.4%
Retail	8122	Death Care Services	 25	● 1.9	0.0%	0	0	0.0%	1.2%
Retail	8123	Drycleaning and Laundry Services	 15	◐ 0.5	-21.1%	(4)	(10)	-66.7%	-0.8%
Telecom Services	5171	Wired Telecommunications Carriers	 61	● 1.1	19.6%	10	21	34.4%	-4.0%
Transportation & Logistics	4821	Rail Transportation	 14	◐ 0.6	7.7%	1	1	7.1%	0.3%
Transportation & Logistics	4841	General Freight Trucking	 153	● 1.7	-8.9%	(15)	(18)	-11.8%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	 22	◐ 0.6	-42.1%	(16)	(17)	-77.3%	4.9%
Transportation & Logistics	4889	Other Support Activities for Transportation	 17	● 6.5	-80.9%	(72)	(12)	-70.6%	-4.1%
Transportation & Logistics	4931	Warehousing and Storage	 932	● 14.4	11.8%	98	158	17.0%	7.6%
Total	10	Total	 13,323	● 1.0	-8.5%	(1,244)	(128)	-1.0%	5.2%

Source: Avalanche Consulting using data from EMSI

Lancaster County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	3112	Grain and Oilseed Milling	76	● 10.5	137.5%	44	4	5.3%	-1.9%
Agribusiness & Food	3119	Other Food Manufacturing	122	● 5.9	617.6%	105	44	36.1%	3.8%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	14	○ 0.2	7.7%	1	2	14.3%	6.4%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	32	● 10.5	-22.0%	(9)	(27)	-84.4%	-26.5%
Apparel & Textiles	3132	Fabric Mills	191	● 32.5	-72.5%	(504)	(186)	-97.4%	-34.2%
Apparel & Textiles	3133	Textile and Fabric Finishing and Fabric Coating Mills	21	● 5.4	-95.1%	(410)	11	52.4%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	31	● 5.1	-92.7%	(392)	(31)	-100.0%	-26.4%
Apparel & Textiles	3159	Apparel Accessories & Other Apparel Mfg.	50	● 34.2	-24.2%	(16)	(1)	-2.0%	-7.4%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	38	● 1.0	660.0%	33	12	31.6%	0.3%
Back Office	5611	Office Administrative Services	184	● 3.4	-4.2%	(8)	(6)	-3.3%	12.4%
Back Office	5613	Employment Services	107	○ 0.3	-53.9%	(125)	(16)	-15.0%	6.0%
Back Office	5614	Business Support Services	17	○ 0.2	240.0%	12	8	47.1%	9.4%
Back Office	5616	Investigation and Security Services	45	○ 0.4	246.2%	32	4	8.9%	9.9%
Back Office	5617	Services to Buildings and Dwellings	639	● 2.9	114.4%	341	25	3.9%	9.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	16	● 0.7	220.0%	11	9	56.3%	9.6%
Building & Construction	2361	Residential Building Construction	68	● 1.0	-40.9%	(47)	(20)	-29.4%	6.4%
Building & Construction	2362	Nonresidential Building Construction	93	● 1.1	-35.4%	(51)	51	54.8%	6.1%
Building & Construction	2371	Utility System Construction	12	○ 0.2	-76.9%	(40)	5	41.7%	4.6%
Building & Construction	2373	Highway, Street, and Bridge Construction	11	○ 0.3	-69.4%	(25)	(6)	-54.5%	6.3%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	111	● 1.3	-48.1%	(103)	52	46.8%	4.7%
Building & Construction	2382	Building Equipment Contractors	184	● 0.9	-40.5%	(125)	14	7.6%	8.5%
Building & Construction	2383	Building Finishing Contractors	25	○ 0.3	78.6%	11	10	40.0%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	22	○ 0.3	-69.4%	(50)	5	22.7%	7.7%
Building & Construction	3271	Clay Product and Refractory Manufacturing	13	● 2.8	-85.7%	(78)	(8)	-61.5%	-7.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	32	● 1.6	-20.0%	(8)	(6)	-18.8%	3.7%
Building & Construction	4441	Building Material and Supplies Dealers	316	● 2.5	34.5%	81	55	17.4%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	45	● 2.8	-10.0%	(5)	(4)	-8.9%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	113	● 3.5	-16.3%	(22)	6	5.3%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	18	○ 0.4	-10.0%	(2)	5	27.8%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	13	● 0.6	-75.0%	(39)	1	7.7%	1.3%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	120	● 0.9	31.9%	29	18	15.0%	9.3%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7211	Traveler Accommodation	26	○ 0.1	0.0%	0	(4)	-15.4%	3.2%
Culture & Entertainment	7221	Full-Service Restaurants	402	● 0.7	3.3%	13	40	10.0%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	551	● 1.1	-9.7%	(59)	2	0.4%	6.5%
Culture & Entertainment	7223	Special Food Services	15	○ 0.2	-60.5%	(23)	(10)	-66.7%	4.3%
Electronics	3341	Computer & Peripheral Equipment Manufacturing	115	● 5.9		115	55	47.8%	-12.6%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	24	○ 0.5	380.0%	19	8	33.3%	-0.4%
Electronics	3359	Other Electrical Equipment & Component Mfg.	396	● 27.0	-35.8%	(221)	(189)	-47.7%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	48	● 1.3	-22.6%	(14)	13	27.1%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	50	○ 0.5	61.3%	19	(5)	-10.0%	14.4%
Energy	2211	Electric Power Gen., Transmission & Distribution	76	● 1.5	145.2%	45	(51)	-67.1%	-3.7%
Energy	3241	Petroleum and Coal Products Manufacturing	29	● 2.2	0.0%	0	(9)	-31.0%	-4.5%
Energy	4235	Metal and Mineral Merchant Wholesalers	21	● 1.5	-30.0%	(9)	(4)	-19.0%	-0.5%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	23	○ 0.4	-67.1%	(47)	(18)	-78.3%	-10.1%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	72	● 2.8	63.6%	28	22	30.6%	-0.2%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	26	○ 0.2	-49.0%	(25)	2	7.7%	8.0%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	103	● 2.0		103	40	38.8%	3.0%
Finance	5221	Depository Credit Intermediation	215	● 1.0	97.2%	106	(9)	-4.2%	3.4%
Finance	5222	Nondepository Credit Intermediation	95	● 1.4	-80.4%	(390)	(10)	-10.5%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	110	● 3.5	685.7%	96	38	34.5%	5.6%
Finance	5241	Insurance Carriers	263	● 1.8	-24.2%	(84)	(8)	-3.0%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	43	○ 0.4	-52.7%	(48)	(17)	-39.5%	7.6%
Finance	5312	Offices of Real Estate Agents and Brokers	12	○ 0.4	-42.9%	(9)	(7)	-58.3%	5.2%
Finance	5313	Activities Related to Real Estate	61	● 0.9	96.8%	30	12	19.7%	6.1%
Furniture	4232	Furniture & Home Furnishing Wholesalers	30	● 2.6	-23.1%	(9)	14	46.7%	1.6%
Government	5621	Waste Collection	109	● 5.9	303.7%	82	6	5.5%	8.7%
Government	9011	Federal Government, Civilian	119	○ 0.3	15.5%	16	(2)	-1.7%	1.4%
Government	9012	Federal Government, Military	341	● 1.3	10.7%	33	2	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	319	● 0.9	-0.3%	(1)	8	2.5%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	419	● 1.4	1.7%	7	13	3.1%	3.8%
Government	9036	Education and Hospitals (Local Government)	1,581	● 1.5	-9.0%	(157)	46	2.9%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	1,113	● 1.6	14.7%	143	39	3.5%	4.8%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Healthcare	6211	Offices of Physicians	776	● 2.5	167.6%	486	156	20.1%	14.0%
Healthcare	6212	Offices of Dentists	97	● 0.9	-9.3%	(10)	(3)	-3.1%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	38	○ 0.4	-9.5%	(4)	(1)	-2.6%	17.6%
Healthcare	6214	Outpatient Care Centers	19	○ 0.2	46.2%	6	7	36.8%	15.1%
Healthcare	6216	Home Health Care Services	88	● 0.6	1660.0%	83	43	48.9%	19.8%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	708	● 1.3	3.2%	22	13	1.8%	6.6%
Healthcare	6231	Nursing Care Facilities	373	● 1.8	24.3%	73	75	20.1%	10.7%
Healthcare	6233	Community Care Facilities for the Elderly	78	● 0.8	14.7%	10	0	0.0%	12.4%
Healthcare	6239	Other Residential Care Facilities	38	● 1.9	-7.3%	(3)	0	0.0%	8.8%
Healthcare	6241	Individual and Family Services	180	● 1.1	91.5%	86	71	39.4%	19.5%
Healthcare	6244	Child Day Care Services	185	● 1.9	3.9%	7	10	5.4%	8.7%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	47	● 2.4	62.1%	18	3	6.4%	-4.9%
Industrial Machinery	3353	Electrical Equipment Manufacturing	63	● 3.9	-20.3%	(16)	(49)	-77.8%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	13	○ 0.2		13	7	53.8%	0.2%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	42	● 1.2	740.0%	37	7	16.7%	4.7%
Logging & Metal/Mineral Mi	1133	Logging	11	● 1.9	-66.7%	(22)	(6)	-54.5%	-4.2%
Logging & Metal/Mineral Mi	1153	Support Activities for Forestry	12	● 7.0	140.0%	7	(7)	-58.3%	-0.1%
Materials	3261	Plastics Product Manufacturing	137	● 2.3	65.1%	54	(61)	-44.5%	-4.9%
Materials	3262	Rubber Product Manufacturing	14	● 1.0		14	(3)	-21.4%	-8.6%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	63	● 4.2	1160.0%	58	16	25.4%	-2.6%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	50	● 7.2	900.0%	45	23	46.0%	-4.0%
Metalworking	3314	Nonferrous Metal Production and Processing	23	● 3.1	360.0%	18	(8)	-34.8%	-7.7%
Metalworking	3323	Architectural and Structural Metals Manufacturing	43	● 1.1	-20.4%	(11)	(20)	-46.5%	1.9%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	33	● 0.8	-23.3%	(10)	(1)	-3.0%	-4.3%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	172	● 5.6	0.0%	0	60	34.9%	-5.4%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	30	● 0.6	150.0%	18	12	40.0%	6.6%
Professional Services	5411	Legal Services	44	○ 0.3	-13.7%	(7)	1	2.3%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	83	● 0.7	40.7%	24	11	13.3%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	124	● 1.6	143.1%	73	42	33.9%	8.5%
Professional Services	5511	Management of Companies and Enterprises	175	● 0.7	-31.9%	(82)	2	1.1%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	692	● 4.8	2668.0%	667	236	34.1%	28.1%

Lancaster County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4411	Automobile Dealers	95	● 0.7	-36.7%	(55)	(31)	-32.6%	-2.0%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	87	● 1.4	7.4%	6	3	3.4%	1.0%
Retail	4421	Furniture Stores	29	● 1.1	7.4%	2	3	10.3%	1.6%
Retail	4431	Electronics and Appliance Stores	33	● 0.5	-46.8%	(29)	(16)	-48.5%	2.9%
Retail	4451	Grocery Stores	364	● 1.2	21.3%	64	(52)	-14.3%	2.3%
Retail	4452	Specialty Food Stores	22	● 0.8	0.0%	0	(4)	-18.2%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	24	● 1.4	4.3%	1	3	12.5%	1.7%
Retail	4461	Health and Personal Care Stores	167	● 1.3	12.8%	19	31	18.6%	6.6%
Retail	4471	Gasoline Stations	149	● 1.5	-29.4%	(62)	(18)	-12.1%	-2.3%
Retail	4481	Clothing Stores	22	○ 0.2	-48.8%	(21)	(2)	-9.1%	3.6%
Retail	4482	Shoe Stores	33	● 1.3	-60.7%	(51)	(28)	-84.8%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	11	● 0.6	-71.1%	(27)	(6)	-54.5%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	17	○ 0.3	30.8%	4	1	5.9%	4.9%
Retail	4529	Other General Merchandise Stores	527	● 2.7	-12.2%	(73)	(43)	-8.2%	15.1%
Retail	4532	Office Supplies, Stationery, and Gift Stores	11	○ 0.3	-35.3%	(6)	(6)	-54.5%	-7.1%
Retail	4533	Used Merchandise Stores	11	● 0.7	120.0%	6	0	0.0%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	27	● 0.8	17.4%	4	(12)	-44.4%	2.2%
Retail	4543	Direct Selling Establishments	22	● 1.4	100.0%	11	13	59.1%	-6.7%
Retail	5322	Consumer Goods Rental	15	● 0.7	0.0%	0	2	13.3%	-1.0%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	20	● 1.4	100.0%	10	0	0.0%	0.9%
Retail	8111	Automotive Repair and Maintenance	133	● 1.3	11.8%	14	7	5.3%	4.0%
Retail	8121	Personal Care Services	16	○ 0.2	-11.1%	(2)	(2)	-12.5%	11.4%
Retail	8122	Death Care Services	53	● 3.2	10.4%	5	(9)	-17.0%	1.2%
Retail	8123	Drycleaning and Laundry Services	28	● 0.8	16.7%	4	(6)	-21.4%	-0.8%
Retail	8141	Private Households	66	● 0.8	73.7%	28	28	42.4%	13.6%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	86	○ 0.4	186.7%	56	26	30.2%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	83	● 1.2	-36.2%	(47)	10	12.0%	-4.0%
Transportation & Logistics	4821	Rail Transportation	13	○ 0.5	-31.6%	(6)	(1)	-7.7%	0.3%
Transportation & Logistics	4841	General Freight Trucking	26	○ 0.2	-16.1%	(5)	3	11.5%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	28	● 0.6	75.0%	12	8	28.6%	4.9%
Transportation & Logistics	4853	Taxi and Limousine Service	11	● 1.3		11	2	18.2%	1.7%

Lancaster County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4921	Couriers and Express Delivery Services	29	○ 0.5	480.0%	24	16	55.2%	1.9%
Transportation & Logistics	4931	Warehousing and Storage	104	● 1.3	-21.2%	(28)	(61)	-58.7%	7.6%
Total	10	Total	16,621	● 1.0	-2.3%	(388)	524	3.2%	5.2%

Source: Avalanche Consulting using data from EMSI

Union County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	10	0.8	100.0%	5	0	0.0%	-1.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	106	95.4	-59.1%	(153)	(58)	-54.7%	-26.5%
Apparel & Textiles	3132	Fabric Mills	142	66.5	-70.0%	(331)	8	5.6%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	182	129.8	-62.5%	(303)	(54)	-29.7%	-33.5%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	17	2.7	240.0%	12	6	35.3%	-3.0%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	125	25.3	2400.0%	120	66	52.8%	-3.9%
Back Office	5613	Employment Services	70	0.5	-38.6%	(44)	1	1.4%	6.0%
Back Office	5616	Investigation and Security Services	11	0.3	120.0%	6	(6)	-54.5%	9.9%
Back Office	5617	Services to Buildings and Dwellings	44	0.5	-25.4%	(15)	(1)	-2.3%	9.8%
Building & Construction	2213	Water, Sewage and Other Systems	41	18.6	7.9%	3	2	4.9%	9.4%
Building & Construction	2361	Residential Building Construction	36	1.4	63.6%	14	18	50.0%	6.4%
Building & Construction	2362	Nonresidential Building Construction	11	0.4	-63.3%	(19)	1	9.1%	6.1%
Building & Construction	2382	Building Equipment Contractors	16	0.2	-76.8%	(53)	(11)	-68.8%	8.5%
Building & Construction	2383	Building Finishing Contractors	15	0.5	-21.1%	(4)	2	13.3%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	53	2.2	55.9%	19	22	41.5%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	44	12.5	12.8%	5	3	6.8%	-10.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	32	4.3	540.0%	27	21	65.6%	3.7%
Building & Construction	4441	Building Material and Supplies Dealers	36	0.8	-23.4%	(11)	(8)	-22.2%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	13	2.2	-18.8%	(3)	(2)	-15.4%	0.6%
Culture & Entertainment	7211	Traveler Accommodation	16	0.2	0.0%	0	(11)	-68.8%	3.2%
Culture & Entertainment	7212	RV Parks and Recreational Camps	45	18.9	-26.2%	(16)	16	35.6%	10.3%
Culture & Entertainment	7221	Full-Service Restaurants	165	0.8	126.0%	92	29	17.6%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	292	1.5	-28.3%	(115)	(47)	-16.1%	6.5%
Education	6116	Other Schools and Instruction (Private)	15	1.0	-55.9%	(19)	0	0.0%	16.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	19	1.1	0.0%	0	(14)	-73.7%	-3.7%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	19	0.9	-17.4%	(4)	(3)	-15.8%	-10.1%
Finance	5221	Depository Credit Intermediation	155	2.0	-13.9%	(25)	(4)	-2.6%	3.4%
Finance	5222	Nondepository Credit Intermediation	56	2.3	16.7%	8	3	5.4%	-2.5%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	26	0.7	0.0%	0	(2)	-7.7%	7.6%
Furniture	4232	Furniture & Home Furnishing Wholesalers	39	9.3	-26.4%	(14)	1	2.6%	1.6%
Government	9011	Federal Government, Civilian	85	0.6	4.9%	4	(2)	-2.4%	1.4%

Union County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Government	9012	Federal Government, Military	118	1.3	1.7%	2	1	0.8%	0.8%
Government	9026	Education and Hospitals (State Government)	47	0.4	-6.0%	(3)	2	4.3%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	186	1.8	-2.1%	(4)	4	2.2%	3.8%
Government	9036	Education and Hospitals (Local Government)	1,071	2.8	-9.2%	(109)	8	0.7%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	521	2.1	-1.0%	(5)	13	2.5%	4.8%
Healthcare	6212	Offices of Dentists	25	0.6	0.0%	0	1	4.0%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	28	0.9	0.0%	0	(4)	-14.3%	17.6%
Healthcare	6214	Outpatient Care Centers	34	1.2	70.0%	14	17	50.0%	15.1%
Healthcare	6219	Other Ambulatory Health Care Services	120	10.0	-4.0%	(5)	10	8.3%	8.1%
Healthcare	6231	Nursing Care Facilities	133	1.7	682.4%	116	52	39.1%	10.7%
Healthcare	6241	Individual and Family Services	27	0.5	68.8%	11	12	44.4%	19.5%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	14	0.5	180.0%	9	3	21.4%	0.2%
Logging & Metal/Mineral Mi	1133	Logging	83	39.7	-13.5%	(13)	(13)	-15.7%	-4.2%
Materials	3222	Converted Paper Product Manufacturing	84	6.8	1580.0%	79	4	4.8%	-10.3%
Materials	3251	Basic Chemical Manufacturing	39	6.3	-70.0%	(91)	(25)	-64.1%	-11.0%
Materials	3261	Plastics Product Manufacturing	155	7.0	50.5%	52	1	0.6%	-4.9%
Metalworking	3321	Forging and Stamping	50	12.4	-35.9%	(28)	(1)	-2.0%	-8.8%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	18	1.2	63.6%	7	(2)	-11.1%	-4.3%
Non-Profits	8134	Civic and Social Organizations	44	2.5	33.3%	11	(4)	-9.1%	5.6%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	36	0.8	-47.1%	(32)	(7)	-19.4%	7.2%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	105	2.0	-23.9%	(33)	64	61.0%	28.1%
Retail	4411	Automobile Dealers	13	0.3	-58.1%	(18)	2	15.4%	-2.0%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	40	1.8	-23.1%	(12)	(4)	-10.0%	1.0%
Retail	4421	Furniture Stores	15	1.6	-16.7%	(3)	(10)	-66.7%	1.6%
Retail	4451	Grocery Stores	151	1.3	-24.5%	(49)	(36)	-23.8%	2.3%
Retail	4461	Health and Personal Care Stores	69	1.5	-1.4%	(1)	14	20.3%	6.6%
Retail	4471	Gasoline Stations	162	4.4	40.9%	47	43	26.5%	-2.3%
Retail	4481	Clothing Stores	14	0.3	180.0%	9	0	0.0%	3.6%
Retail	4521	Department Stores	102	1.5	325.0%	78	27	26.5%	-3.3%
Retail	4529	Other General Merchandise Stores	215	3.0	12.6%	24	(21)	-9.8%	15.1%
Retail	4543	Direct Selling Establishments	10	1.7	-41.2%	(7)	(5)	-50.0%	-6.7%

Union County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	8111	Automotive Repair and Maintenance	43	1.2	72.0%	18	16	37.2%	4.0%
Retail	8121	Personal Care Services	11	0.4	120.0%	6	3	27.3%	11.4%
Retail	8122	Death Care Services	27	4.5	0.0%	0	(4)	-14.8%	1.2%
Retail	8123	Drycleaning and Laundry Services	11	0.8	-26.7%	(4)	(6)	-54.5%	-0.8%
Retail	8141	Private Households	32	1.1	18.5%	5	0	0.0%	13.6%
Telecom Services	5171	Wired Telecommunications Carriers	13	0.5		13	3	23.1%	-4.0%
Transportation & Logistics	4821	Rail Transportation	21	2.1	-12.5%	(3)	1	4.8%	0.3%
Transportation & Logistics	4841	General Freight Trucking	22	0.5	-38.9%	(14)	0	0.0%	4.3%
Total	10	Total	6,043	1.0	-18.3%	(1,357)	132	2.2%	5.2%

Source: Avalanche Consulting using data from EMSI

York County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Agribusiness & Food	1110	Crop Production	436	● 1.4	22.8%	81	(10)	-2.3%	-1.2%
Agribusiness & Food	1120	Animal Production	11	○ 0.1	-31.3%	(5)	(6)	-54.5%	-1.5%
Agribusiness & Food	1151	Support Activities for Crop Production	17	○ 0.1		17	(1)	-5.9%	4.2%
Agribusiness & Food	3116	Animal Slaughtering and Processing	47	○ 0.2	135.0%	27	12	25.5%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	42	○ 0.3	740.0%	37	7	16.7%	-1.0%
Agribusiness & Food	3121	Beverage Manufacturing	28	○ 0.3	3.7%	1	(8)	-28.6%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	888	● 2.1	19.8%	147	150	16.9%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	139	● 1.4	17.8%	21	18	12.9%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	228	● 16.1	-32.5%	(110)	(136)	-59.6%	-26.5%
Apparel & Textiles	3132	Fabric Mills	351	● 12.9	-17.8%	(76)	28	8.0%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	51	● 2.8	-17.7%	(11)	(51)	-100.0%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	27	● 1.0	68.8%	11	(22)	-81.5%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	82	● 2.5	24.2%	16	(2)	-2.4%	-6.4%
Apparel & Textiles	3159	Apparel Accessories & Other Apparel Mfg.	16	● 2.4	220.0%	11	(1)	-6.3%	-7.4%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	299	● 3.8	30.0%	69	34	11.4%	-3.0%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	232	● 3.7	562.9%	197	50	21.6%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	1,140	● 4.9	-32.9%	(560)	(31)	-2.7%	-12.1%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	43	○ 0.2	186.7%	28	14	32.6%	0.3%
Back Office	5611	Office Administrative Services	327	● 1.3	53.5%	114	58	17.7%	12.4%
Back Office	5612	Facilities Support Services	37	● 0.4	640.0%	32	13	35.1%	14.8%
Back Office	5613	Employment Services	2,744	● 1.7	2.2%	59	414	15.1%	6.0%
Back Office	5614	Business Support Services	1,076	● 2.3	35.2%	280	333	30.9%	9.4%
Back Office	5616	Investigation and Security Services	194	● 0.4	39.6%	55	34	17.5%	9.9%
Back Office	5617	Services to Buildings and Dwellings	806	● 0.8	-33.8%	(411)	(10)	-1.2%	9.8%
Back Office	5619	Other Support Services	50	● 0.3	127.3%	28	6	12.0%	4.7%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	243	● 1.4	35.0%	63	(37)	-15.2%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	98	● 0.9	716.7%	86	42	42.9%	9.6%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	44	● 0.3	214.3%	30	16	36.4%	16.3%
Building & Construction	2213	Water, Sewage and Other Systems	57	● 2.0	-8.1%	(5)	33	57.9%	9.4%
Building & Construction	2361	Residential Building Construction	135	● 0.4	-61.3%	(214)	(27)	-20.0%	6.4%
Building & Construction	2362	Nonresidential Building Construction	116	● 0.3	-56.4%	(150)	29	25.0%	6.1%

York County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	2371	Utility System Construction	81	● 0.4	-64.8%	(149)	4	4.9%	4.6%
Building & Construction	2372	Land Subdivision	45	● 1.7	-53.6%	(52)	(7)	-15.6%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	17	○ 0.1	-50.0%	(17)	(7)	-41.2%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	26	● 0.5	116.7%	14	8	30.8%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	349	● 0.9	-43.7%	(271)	39	11.2%	4.7%
Building & Construction	2382	Building Equipment Contractors	966	● 1.0	-27.0%	(357)	143	14.8%	8.5%
Building & Construction	2383	Building Finishing Contractors	225	● 0.6	-54.2%	(266)	(64)	-28.4%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	450	● 1.4	-39.5%	(294)	114	25.3%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	21	● 0.5	-43.2%	(16)	(6)	-28.6%	-10.3%
Building & Construction	3212	Veneer, Plywood, & Eng. Wood Product Mfg.	408	● 12.4	2.3%	9	128	31.4%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	81	● 0.8	42.1%	24	15	18.5%	-6.4%
Building & Construction	3272	Glass and Glass Product Manufacturing	105	● 2.5	-22.8%	(31)	18	17.1%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	48	● 0.5	-65.7%	(92)	(15)	-31.3%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	19	● 0.5	280.0%	14	9	47.4%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	33	● 0.3	-57.7%	(45)	(5)	-15.2%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	202	● 1.6	16.1%	28	11	5.4%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	788	● 1.3	-6.9%	(58)	35	4.4%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	59	● 0.8	-31.4%	(27)	(54)	-91.5%	0.6%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	93	● 0.6	66.1%	37	14	15.1%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	353	● 1.9	54.1%	124	(69)	-19.5%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	30	○ 0.3	-38.8%	(19)	(2)	-6.7%	1.3%
Culture & Entertainment	7112	Spectator Sports	74	● 1.0	-22.1%	(21)	0	0.0%	7.3%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	74	● 0.9	516.7%	62	10	13.5%	8.8%
Culture & Entertainment	7131	Amusement Parks and Arcades	254	● 2.5	-41.6%	(181)	(54)	-21.3%	3.5%
Culture & Entertainment	7132	Gambling Industries	112	● 1.4	700.0%	98	45	40.2%	19.8%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	845	● 1.3	-32.9%	(415)	66	7.8%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	440	● 0.4	-28.7%	(177)	(97)	-22.0%	3.2%
Culture & Entertainment	7212	RV Parks and Recreational Camps	199	● 6.5	126.1%	111	38	19.1%	10.3%
Culture & Entertainment	7221	Full-Service Restaurants	2,675	● 1.0	-2.0%	(54)	286	10.7%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	3,694	● 1.5	20.1%	619	533	14.4%	6.5%
Culture & Entertainment	7223	Special Food Services	319	● 1.0	25.1%	64	63	19.7%	4.3%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	84	● 0.4	55.6%	30	(7)	-8.3%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	45	○ 0.1	-39.2%	(29)	(6)	-13.3%	13.4%
Education	6112	Junior Colleges (Private)	16	● 0.5	220.0%	11	2	12.5%	14.3%
Education	6115	Technical and Trade Schools (Private)	73	● 0.9	563.6%	62	14	19.2%	14.1%
Education	6116	Other Schools and Instruction (Private)	124	● 0.6	11.7%	13	17	13.7%	16.8%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	18	○ 0.1	-60.0%	(27)	1	5.6%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	250	● 1.1	290.6%	186	35	14.0%	-0.4%
Electronics	3359	Other Electrical Equipment & Component Mfg.	155	● 2.3	27.0%	33	121	78.1%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	164	● 0.9	-45.5%	(137)	(82)	-50.0%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	445	● 0.9	98.7%	221	(181)	-40.7%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	11	○ 0.2	120.0%	6	(1)	-9.1%	2.8%
Energy	2211	Electric Power Gen., Transmission & Distribution	1,311	● 5.7	5.6%	69	29	2.2%	-3.7%
Energy	3241	Petroleum and Coal Products Manufacturing	10	○ 0.2	-44.4%	(8)	(5)	-50.0%	-4.5%
Energy	4235	Metal and Mineral Merchant Wholesalers	58	● 0.9	26.1%	12	5	8.6%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	33	● 0.6	94.1%	16	14	42.4%	-6.0%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	119	● 0.5	-26.5%	(43)	(40)	-33.6%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	493	● 1.9	17.7%	74	4	0.8%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	46	○ 0.2	-41.8%	(33)	(5)	-10.9%	5.9%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	25	○ 0.2	-66.2%	(49)	11	44.0%	-0.2%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	766	● 1.0	15.2%	101	73	9.5%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	30	● 0.4	66.7%	12	11	36.7%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	129	● 0.5	-37.4%	(77)	13	10.1%	3.0%
Finance	5221	Depository Credit Intermediation	687	● 0.7	-3.8%	(27)	81	11.8%	3.4%
Finance	5222	Nondepository Credit Intermediation	4,537	● 14.7	34.9%	1,173	1,629	35.9%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	68	● 0.5	-37.6%	(41)	6	8.8%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	45	○ 0.2	55.2%	16	9	20.0%	3.1%
Finance	5239	Other Financial Investment Activities	39	○ 0.2	30.0%	9	3	7.7%	6.8%
Finance	5241	Insurance Carriers	93	○ 0.1	12.0%	10	1	1.1%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	324	● 0.6	3.5%	11	48	14.8%	7.6%
Finance	5251	Insurance and Employee Benefit Funds	120	● 4.5	-31.8%	(56)	20	16.7%	5.0%
Finance	5311	Lessors of Real Estate	178	● 0.5	-4.8%	(9)	38	21.3%	1.6%

York County, SC

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5312	Offices of Real Estate Agents and Brokers	178	● 1.1	-11.9%	(24)	36	20.2%	5.2%
Finance	5313	Activities Related to Real Estate	105	● 0.3	-7.9%	(9)	4	3.8%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	20	○ 0.2	-64.9%	(37)	(15)	-75.0%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	31	● 0.6	158.3%	19	11	35.5%	-5.8%
Furniture	4232	Furniture & Home Furnishing Wholesalers	59	● 1.1	-52.4%	(65)	8	13.6%	1.6%
Government	5621	Waste Collection	40	● 0.5	122.2%	22	(11)	-27.5%	8.7%
Government	5622	Waste Treatment and Disposal	14	○ 0.3	180.0%	9	2	14.3%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	36	● 0.5	-32.1%	(17)	1	2.8%	8.6%
Government	9011	Federal Government, Civilian	495	○ 0.3	23.8%	95	5	1.0%	1.4%
Government	9012	Federal Government, Military	914	● 0.8	4.0%	35	5	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	2,412	● 1.5	14.9%	312	163	6.8%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	666	● 0.5	-2.1%	(14)	53	8.0%	3.8%
Government	9036	Education and Hospitals (Local Government)	5,268	● 1.1	3.8%	194	412	7.8%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	3,222	● 1.0	8.9%	262	263	8.2%	4.8%
Healthcare	6211	Offices of Physicians	1,108	● 0.8	13.4%	131	157	14.2%	14.0%
Healthcare	6212	Offices of Dentists	600	● 1.2	19.8%	99	83	13.8%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	266	● 0.6	43.8%	81	63	23.7%	17.6%
Healthcare	6214	Outpatient Care Centers	163	● 0.4	41.7%	48	51	31.3%	15.1%
Healthcare	6216	Home Health Care Services	749	● 1.1	47.4%	241	177	23.6%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	133	● 0.9	60.2%	50	12	9.0%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	1,687	● 0.6	1.1%	18	184	10.9%	6.6%
Healthcare	6231	Nursing Care Facilities	764	● 0.8	7.9%	56	61	8.0%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	438	● 1.3	32.7%	108	118	26.9%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	843	● 1.8	22.7%	156	117	13.9%	12.4%
Healthcare	6239	Other Residential Care Facilities	163	● 1.7	5.8%	9	(10)	-6.1%	8.8%
Healthcare	6241	Individual and Family Services	325	● 0.4	97.0%	160	117	36.0%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	51	● 0.6	-10.5%	(6)	5	9.8%	9.9%
Healthcare	6244	Child Day Care Services	700	● 1.5	-6.4%	(48)	83	11.9%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	36	● 0.3	-10.0%	(4)	20	55.6%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	176	● 3.1	97.8%	87	(16)	-9.1%	-13.2%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	311	● 4.3	170.4%	196	(31)	-10.0%	-9.8%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	3335	Metalworking Machinery Manufacturing	122	● 1.3	-7.6%	(10)	(30)	-24.6%	-4.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	267	● 2.0	11.3%	27	(14)	-5.2%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	215	● 8.7	-8.9%	(21)	27	12.6%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	132	● 1.7	-45.9%	(112)	8	6.1%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	160	● 0.5	107.8%	83	38	23.8%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	712	● 2.0	23.0%	133	93	13.1%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	153	● 0.9	-6.1%	(10)	4	2.6%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	186	● 1.8	-21.8%	(52)	(64)	-34.4%	3.3%
Logging & Metal/Mineral Mii	1133	Logging	29	● 1.1	-69.8%	(67)	(10)	-34.5%	-4.2%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	25	● 0.5	-44.4%	(20)	0	0.0%	-2.9%
Materials	3221	Pulp, Paper, and Paperboard Mills	829	● 13.9	-7.7%	(69)	17	2.1%	-18.9%
Materials	3222	Converted Paper Product Manufacturing	337	● 2.1	-30.9%	(151)	(88)	-26.1%	-10.3%
Materials	3251	Basic Chemical Manufacturing	171	● 2.2	-16.6%	(34)	(45)	-26.3%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	145	● 2.9	-13.2%	(22)	(127)	-87.6%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	34	● 1.1	580.0%	29	22	64.7%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	61	● 1.1	5.2%	3	19	31.1%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	377	● 8.1	-8.5%	(35)	148	39.3%	-7.6%
Materials	3261	Plastics Product Manufacturing	54	○ 0.2	-5.3%	(3)	6	11.1%	-4.9%
Materials	3262	Rubber Product Manufacturing	181	● 2.7	4.6%	8	(19)	-10.5%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	33	● 0.5	560.0%	28	(7)	-21.2%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	138	● 2.0	36.6%	37	(5)	-3.6%	-2.6%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	86	● 2.7	43.3%	26	40	46.5%	-4.0%
Metalworking	3321	Forging and Stamping	51	● 1.0	-72.1%	(132)	(33)	-64.7%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	121	● 5.6	86.2%	56	(11)	-9.1%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	290	● 1.6	50.3%	97	63	21.7%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	36	● 0.7	28.6%	8	(10)	-27.8%	-5.3%
Metalworking	3326	Spring and Wire Product Manufacturing	26	● 1.1	-52.7%	(29)	(1)	-3.8%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	307	● 1.6	46.2%	97	21	6.8%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	223	● 3.1	18.6%	35	59	26.5%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	773	● 5.4	-10.6%	(92)	(61)	-7.9%	-5.4%
Non-Profits	8132	Grantmaking and Giving Services	22	● 0.3	340.0%	17	5	22.7%	6.9%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Non-Profits	8133	Social Advocacy Organizations	19	○ 0.2	-36.7%	(11)	2	10.5%	7.4%
Non-Profits	8134	Civic and Social Organizations	40	○ 0.2	-58.3%	(56)	(20)	-50.0%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	121	● 0.5	55.1%	43	22	18.2%	6.6%
Professional Services	5411	Legal Services	298	● 0.5	-17.2%	(62)	(2)	-0.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	291	● 0.5	-4.0%	(12)	(6)	-2.1%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	224	● 0.6	-4.7%	(11)	16	7.1%	8.5%
Professional Services	5511	Management of Companies and Enterprises	150	○ 0.1	24.0%	29	36	24.0%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	261	● 0.4	31.8%	63	85	32.6%	28.1%
Retail	4411	Automobile Dealers	682	● 1.1	-12.7%	(99)	(48)	-7.0%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	144	● 1.9	-21.7%	(40)	16	11.1%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	779	● 2.7	118.2%	422	118	15.1%	1.0%
Retail	4421	Furniture Stores	138	● 1.1	-26.2%	(49)	34	24.6%	1.6%
Retail	4422	Home Furnishings Stores	62	● 0.5	-19.5%	(15)	(32)	-51.6%	2.6%
Retail	4431	Electronics and Appliance Stores	170	● 0.6	-52.6%	(189)	29	17.1%	2.9%
Retail	4451	Grocery Stores	1,645	● 1.1	8.4%	127	(2)	-0.1%	2.3%
Retail	4452	Specialty Food Stores	58	● 0.5	1.8%	1	(9)	-15.5%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	68	● 0.8	13.3%	8	(1)	-1.5%	1.7%
Retail	4461	Health and Personal Care Stores	720	● 1.2	24.4%	141	127	17.6%	6.6%
Retail	4471	Gasoline Stations	507	● 1.1	-8.6%	(48)	26	5.1%	-2.3%
Retail	4481	Clothing Stores	221	● 0.3	-60.7%	(341)	(35)	-15.8%	3.6%
Retail	4482	Shoe Stores	66	● 0.6	8.2%	5	23	34.8%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	32	● 0.4	-47.5%	(29)	(17)	-53.1%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	205	● 0.8	28.9%	46	8	3.9%	4.9%
Retail	4512	Book, Periodical, and Music Stores	42	● 0.6	-17.6%	(9)	2	4.8%	-10.2%
Retail	4521	Department Stores	1,392	● 1.6	133.6%	796	76	5.5%	-3.3%
Retail	4529	Other General Merchandise Stores	2,136	● 2.4	107.6%	1,107	59	2.8%	15.1%
Retail	4531	Florists	16	● 0.4	-65.2%	(30)	(11)	-68.8%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	72	● 0.4	-23.4%	(22)	0	0.0%	-7.1%
Retail	4533	Used Merchandise Stores	83	● 1.1	53.7%	29	13	15.7%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	163	● 1.0	-3.6%	(6)	(14)	-8.6%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	42	● 0.3	35.5%	11	(9)	-21.4%	6.3%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	4542	Vending Machine Operators	33	● 1.6	-38.9%	(21)	(1)	-3.0%	-0.7%
Retail	4543	Direct Selling Establishments	47	● 0.6	-60.5%	(72)	(6)	-12.8%	-6.7%
Retail	5322	Consumer Goods Rental	61	● 0.6	-33.0%	(30)	(28)	-45.9%	-1.0%
Retail	5323	General Rental Centers	20	● 0.9	25.0%	4	4	20.0%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	261	● 3.8	342.4%	202	4	1.5%	0.9%
Retail	8111	Automotive Repair and Maintenance	449	● 1.0	0.4%	2	62	13.8%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	20	● 0.5	-35.5%	(11)	(7)	-35.0%	-2.2%
Retail	8121	Personal Care Services	305	● 0.8	35.0%	79	38	12.5%	11.4%
Retail	8122	Death Care Services	73	● 1.0	5.8%	4	(7)	-9.6%	1.2%
Retail	8123	Drycleaning and Laundry Services	129	● 0.8	-15.1%	(23)	(20)	-15.5%	-0.8%
Retail	8129	Other Personal Services	45	● 0.3	-36.6%	(26)	(7)	-15.6%	6.0%
Retail	8141	Private Households	186	● 0.5	55.0%	66	41	22.0%	13.6%
Software / Info. Tech.	5112	Software Publishers	68	● 0.4	257.9%	49	12	17.6%	13.1%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	60	● 0.4	-13.0%	(9)	11	18.3%	15.6%
Software / Info. Tech.	5191	Other Information Services	10	○ 0.1	-83.6%	(51)	4	40.0%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	132	○ 0.1	8.2%	10	(9)	-6.8%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	722	● 2.2	8.6%	57	291	40.3%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	24	○ 0.3	-7.7%	(2)	(2)	-8.3%	5.1%
Telecom Services	5179	Other Telecommunications	24	● 0.4	-70.0%	(56)	(19)	-79.2%	-4.3%
Transportation & Logistics	4821	Rail Transportation	62	● 0.5	-7.5%	(5)	4	6.5%	0.3%
Transportation & Logistics	4841	General Freight Trucking	501	● 1.0	1.4%	7	218	43.5%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	153	● 0.7	14.2%	19	42	27.5%	4.9%
Transportation & Logistics	4884	Support Activities for Road Transportation	14	○ 0.3	-30.0%	(6)	2	14.3%	11.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	170	● 0.6	23.2%	32	83	48.8%	1.9%
Transportation & Logistics	4931	Warehousing and Storage	809	● 2.2	-7.4%	(65)	201	24.8%	7.6%
Total	10	Total	77,222	● 1.0	3.9%	2,878	7,549	9.8%	5.2%

Source: Avalanche Consulting using data from EMSI

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	325	○ 0.1	22.6%	60	5	1.5%	0.2%
Agribusiness & Food	1110	Crop Production	1,404	● 0.4	1.7%	23	190	13.5%	-1.2%
Agribusiness & Food	1120	Animal Production	713	● 0.5	-22.4%	(206)	(128)	-18.0%	-1.5%
Agribusiness & Food	1142	Hunting and Trapping	19	● 1.8	-9.5%	(2)	(7)	-36.8%	-8.6%
Agribusiness & Food	1151	Support Activities for Crop Production	201	○ 0.1	21.8%	36	(2)	-1.0%	4.2%
Agribusiness & Food	1152	Support Activities for Animal Production	87	● 0.5	97.7%	43	4	4.6%	10.0%
Agribusiness & Food	3111	Animal Food Manufacturing	287	● 0.8	14.8%	37	(40)	-13.9%	-1.6%
Agribusiness & Food	3112	Grain and Oilseed Milling	237	● 0.6	-18.3%	(53)	(103)	-43.5%	-1.9%
Agribusiness & Food	3113	Sugar and Confectionery Product Manufacturing	257	● 0.6	-6.9%	(19)	(8)	-3.1%	-4.3%
Agribusiness & Food	3114	Fruit & Vegetable Preserving & Specialty Food Mfg.	202	● 0.2	69.7%	83	22	10.9%	-3.8%
Agribusiness & Food	3115	Dairy Product Manufacturing	130	● 0.2	333.3%	100	19	14.6%	1.1%
Agribusiness & Food	3116	Animal Slaughtering and Processing	2,602	● 0.8	-13.7%	(414)	(231)	-8.9%	2.3%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	1,991	● 1.1	-5.6%	(119)	(492)	-24.7%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	2,220	● 2.0	32.9%	549	75	3.4%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	852	● 0.7	-6.1%	(55)	(103)	-12.1%	0.9%
Agribusiness & Food	3122	Tobacco Manufacturing	439	● 4.6	-82.5%	(2,063)	(297)	-67.7%	-13.4%
Agribusiness & Food	3253	Pesticide, Fertilizer, & Other Ag. Chemical Mfg.	15	○ 0.1	-34.8%	(8)	7	46.7%	1.6%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	5,410	● 1.1	-13.5%	(846)	1,043	19.3%	6.4%
Agribusiness & Food	4245	Farm Product Raw Material Merchant Wholesalers	60	○ 0.1	-56.5%	(78)	(24)	-40.0%	-4.1%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	801	● 0.7	-19.4%	(193)	203	25.3%	10.0%
Apparel & Textiles	3131	Fiber, Yarn, and Thread Mills	1,818	● 11.2	-56.4%	(2,356)	(920)	-50.6%	-26.5%
Apparel & Textiles	3132	Fabric Mills	2,376	● 7.6	-9.7%	(256)	79	3.3%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	745	● 3.6	-56.2%	(957)	(732)	-98.3%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	463	● 1.4	-69.2%	(1,038)	(224)	-48.4%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	516	● 1.3	-32.7%	(251)	8	1.6%	-6.4%
Apparel & Textiles	3151	Apparel Knitting Mills	319	● 3.6	-61.8%	(516)	(196)	-61.4%	-52.1%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	161	● 0.2	-50.3%	(163)	(56)	-34.8%	-33.6%
Apparel & Textiles	3159	Apparel Accessories & Other Apparel Mfg.	131	● 1.7	-42.0%	(95)	(93)	-71.0%	-7.4%
Apparel & Textiles	3161	Leather and Hide Tanning and Finishing	10	● 0.4	-64.3%	(18)	(5)	-50.0%	-27.7%
Apparel & Textiles	3169	Other Leather and Allied Product Manufacturing	28	● 0.4	-63.6%	(49)	1	3.6%	-8.4%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	1,539	● 1.7	0.7%	10	(179)	-11.6%	-3.0%

Centralina Region

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Automotive	3361	Motor Vehicle Manufacturing	2,185	2.2	-42.5%	(1,612)	(181)	-8.3%	-6.4%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	142	0.2	-58.5%	(200)	(77)	-54.2%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	4,280	1.6	-12.8%	(631)	508	11.9%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	375	1.6	-20.9%	(99)	98	26.1%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	2,941	1.4	-4.5%	(139)	161	5.5%	0.3%
Back Office	5611	Office Administrative Services	3,050	1.0	19.1%	489	982	32.2%	12.4%
Back Office	5612	Facilities Support Services	1,450	1.4	11.4%	148	749	51.7%	14.8%
Back Office	5613	Employment Services	26,726	1.4	-10.1%	(3,003)	2,461	9.2%	6.0%
Back Office	5614	Business Support Services	5,664	1.0	34.3%	1,446	1,601	28.3%	9.4%
Back Office	5616	Investigation and Security Services	6,019	1.1	-4.9%	(310)	1,570	26.1%	9.9%
Back Office	5617	Services to Buildings and Dwellings	13,318	1.1	-2.4%	(325)	2,605	19.6%	9.8%
Back Office	5619	Other Support Services	3,524	1.9	19.7%	579	804	22.8%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	676	0.4	64.1%	264	173	25.6%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	1,600	0.8	-6.5%	(112)	19	1.2%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	991	0.8	16.6%	141	335	33.8%	9.6%
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	1,207	0.7	40.0%	345	315	26.1%	16.3%
Building & Construction	2213	Water, Sewage and Other Systems	134	0.4	-0.7%	(1)	26	19.4%	9.4%
Building & Construction	2361	Residential Building Construction	4,115	1.1	-52.6%	(4,570)	200	4.9%	6.4%
Building & Construction	2362	Nonresidential Building Construction	4,232	1.0	-9.4%	(439)	1,002	23.7%	6.1%
Building & Construction	2371	Utility System Construction	1,562	0.6	-53.4%	(1,790)	(22)	-1.4%	4.6%
Building & Construction	2372	Land Subdivision	220	0.7	-68.3%	(475)	7	3.2%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	1,528	0.8	-59.4%	(2,240)	350	22.9%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	232	0.4	-52.2%	(253)	34	14.7%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	6,451	1.5	-37.6%	(3,890)	751	11.6%	4.7%
Building & Construction	2382	Building Equipment Contractors	14,915	1.4	-23.2%	(4,498)	2,285	15.3%	8.5%
Building & Construction	2383	Building Finishing Contractors	5,272	1.3	-32.4%	(2,523)	991	18.8%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	3,849	1.1	-30.9%	(1,719)	447	11.6%	7.7%
Building & Construction	3211	Sawmills and Wood Preservation	133	0.3	-66.6%	(265)	(53)	-39.8%	-10.3%
Building & Construction	3212	Veneer, Plywood, & Eng. Wood Product Mfg.	139	0.4	-70.0%	(325)	22	15.8%	-2.7%
Building & Construction	3219	Other Wood Product Manufacturing	1,900	1.6	-49.3%	(1,848)	(49)	-2.6%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	501	2.0	-45.1%	(411)	(289)	-57.7%	-7.3%

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Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Building & Construction	3272	Glass and Glass Product Manufacturing	610	● 1.2	28.2%	134	45	7.4%	-10.7%
Building & Construction	3273	Cement and Concrete Product Manufacturing	1,126	● 1.0	-40.0%	(752)	115	10.2%	3.7%
Building & Construction	3274	Lime and Gypsum Product Manufacturing	25	● 0.3	400.0%	20	(13)	-52.0%	-15.0%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	370	● 0.9	-31.1%	(167)	61	16.5%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	2,164	● 1.7	-26.3%	(771)	86	4.0%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	2,662	● 1.8	-21.8%	(743)	124	4.7%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	7,276	● 1.1	-16.1%	(1,396)	1,186	16.3%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	666	● 0.8	-19.6%	(162)	13	2.0%	0.6%
Consumer Goods Mftg	3352	Household Appliance Manufacturing	212	● 0.6	685.2%	185	91	42.9%	-10.3%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	1,604	● 0.9	-29.0%	(654)	(65)	-4.1%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	1,899	● 0.9	-18.7%	(438)	1	0.1%	-0.4%
Culture & Entertainment	4871	Scenic and Sightseeing Transportation, Land	28	● 0.4	-57.6%	(38)	6	21.4%	11.3%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	507	● 0.4	-16.5%	(100)	(66)	-13.0%	1.3%
Culture & Entertainment	7111	Performing Arts Companies	266	● 0.4	-8.9%	(26)	(124)	-46.6%	1.6%
Culture & Entertainment	7112	Spectator Sports	4,669	● 5.6	-12.4%	(658)	897	19.2%	7.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	583	● 0.9	-8.0%	(51)	45	7.7%	9.5%
Culture & Entertainment	7114	Agents & Managers for Artists, Athletes, & Others	120	● 0.9	-26.8%	(44)	4	3.3%	6.8%
Culture & Entertainment	7115	Independent Artists, Writers, and Performers	154	● 0.5	25.2%	31	43	27.9%	13.1%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	622	● 0.7	-5.0%	(33)	186	29.9%	8.8%
Culture & Entertainment	7131	Amusement Parks and Arcades	1,275	● 1.1	30.1%	295	90	7.1%	3.5%
Culture & Entertainment	7132	Gambling Industries	44	○ 0.0	214.3%	30	42	95.5%	19.8%
Culture & Entertainment	7139	Other Amusement and Recreation Industries	9,135	● 1.3	39.3%	2,575	2,120	23.2%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	7,115	● 0.6	-11.8%	(954)	590	8.3%	3.2%
Culture & Entertainment	7212	RV Parks and Recreational Camps	25	○ 0.1	400.0%	20	8	32.0%	10.3%
Culture & Entertainment	7213	Rooming and Boarding Houses	45	● 0.6	-4.3%	(2)	1	2.2%	-1.9%
Culture & Entertainment	7221	Full-Service Restaurants	34,050	● 1.1	5.4%	1,730	2,381	7.0%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	35,902	● 1.3	13.8%	4,359	4,380	12.2%	6.5%
Culture & Entertainment	7223	Special Food Services	2,908	● 0.8	1.9%	55	238	8.2%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	2,293	● 1.0	50.0%	764	381	16.6%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	4,638	● 1.0	50.5%	1,556	704	15.2%	13.4%
Education	6112	Junior Colleges (Private)	130	● 0.4	-20.2%	(33)	(7)	-5.4%	14.3%

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With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Education	6113	Colleges, Universities, & Prof. Schools (Private)	5,262	● 0.7	25.1%	1,056	700	13.3%	11.7%
Education	6114	Bus. Schools & Comp. & Mgmt. Training (Private)	406	● 0.8	-20.2%	(103)	12	3.0%	3.0%
Education	6115	Technical and Trade Schools (Private)	446	● 0.5	-18.3%	(100)	(5)	-1.1%	14.1%
Education	6116	Other Schools and Instruction (Private)	2,179	● 1.0	3.3%	69	257	11.8%	16.8%
Education	6117	Educational Support Services (Private)	424	● 0.5	17.5%	63	79	18.6%	23.6%
Electronics	3341	Computer & Peripheral Equipment Manufacturing	728	● 0.7	-38.7%	(460)	(206)	-28.3%	-12.6%
Electronics	3342	Communications Equipment Manufacturing	183	● 0.3	731.8%	161	41	22.4%	-8.5%
Electronics	3343	Audio and Video Equipment Manufacturing	150	● 1.1	-19.8%	(37)	(61)	-40.7%	-22.3%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	515	● 0.2	-55.4%	(640)	(398)	-77.3%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	419	● 0.2	-18.3%	(94)	(39)	-9.3%	-0.4%
Electronics	3346	Mfg. and Reproducing Magnetic and Optical Media	1,241	● 7.8	-6.8%	(90)	171	13.8%	-13.1%
Electronics	3359	Other Electrical Equipment & Component Mfg.	660	● 0.8	-20.5%	(170)	85	12.9%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	1,837	● 0.9	-13.0%	(275)	(115)	-6.3%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	8,125	● 1.4	14.1%	1,004	993	12.2%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	375	● 0.6	9.3%	32	41	10.9%	2.8%
Energy	2131	Support Activities for Mining	35	○ 0.0	40.0%	10	10	28.6%	-1.1%
Energy	2211	Electric Power Gen., Transmission & Distribution	2,088	● 0.8	-20.1%	(524)	(596)	-28.5%	-3.7%
Energy	2212	Natural Gas Distribution	391	● 0.5	-2.7%	(11)	(18)	-4.6%	0.7%
Energy	3241	Petroleum and Coal Products Manufacturing	215	● 0.3	-4.0%	(9)	(22)	-10.2%	-4.5%
Energy	4235	Metal and Mineral Merchant Wholesalers	1,105	● 1.4	-15.5%	(202)	(66)	-6.0%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	638	● 1.0	-1.2%	(8)	42	6.6%	-6.0%
Energy	4862	Pipeline Transportation of Natural Gas	22	○ 0.1		22	19	86.4%	-1.7%
Engineering, Design, & Conte	3231	Printing and Related Support Activities	2,301	● 0.8	-37.1%	(1,360)	(259)	-11.3%	-10.4%
Engineering, Design, & Conte	5111	Newspaper, Period., Book, & Directory Publishers	2,111	● 0.7	-40.6%	(1,440)	(297)	-14.1%	-10.1%
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	1,173	● 0.5	2.9%	33	(33)	-2.8%	5.9%
Engineering, Design, & Conte	5122	Sound Recording Industries	36	● 0.4	-59.1%	(52)	(7)	-19.4%	-16.8%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	2,230	● 1.6	17.9%	339	(153)	-6.9%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	2,406	● 4.5	15.9%	330	649	27.0%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	8,779	● 1.0	-15.6%	(1,618)	769	8.8%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	509	● 0.6	-17.2%	(106)	41	8.1%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	1,499	● 0.5	-26.6%	(543)	(160)	-10.7%	3.0%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Finance	5211	Monetary Authorities-Central Bank	457	● 3.2	-43.8%	(356)	75	16.4%	3.3%
Finance	5221	Depository Credit Intermediation	26,489	● 2.3	1.2%	308	5,044	19.0%	3.4%
Finance	5222	Nondepository Credit Intermediation	5,339	● 1.5	-29.3%	(2,208)	(1,126)	-21.1%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	1,271	● 0.8	-38.4%	(792)	46	3.6%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	4,400	● 1.5	-18.3%	(986)	571	13.0%	3.1%
Finance	5232	Securities and Commodity Exchanges	11	● 0.2	10.0%	1	3	27.3%	3.7%
Finance	5239	Other Financial Investment Activities	4,978	● 2.2	15.7%	677	1,387	27.9%	6.8%
Finance	5241	Insurance Carriers	7,242	● 1.0	-9.4%	(748)	(24)	-0.3%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	5,341	● 0.9	0.2%	10	668	12.5%	7.6%
Finance	5251	Insurance and Employee Benefit Funds	219	● 0.7	87.2%	102	2	0.9%	5.0%
Finance	5259	Other Investment Pools and Funds	71	● 0.3	-5.3%	(4)	(7)	-9.9%	5.1%
Finance	5311	Lessors of Real Estate	2,714	● 0.7	-2.1%	(59)	304	11.2%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	2,063	● 1.1	-38.4%	(1,286)	97	4.7%	5.2%
Finance	5313	Activities Related to Real Estate	3,577	● 1.0	5.8%	195	698	19.5%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	1,984	● 1.5	-46.9%	(1,753)	(108)	-5.4%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	312	● 0.5	-63.4%	(540)	(140)	-44.9%	-5.8%
Furniture	3379	Other Furniture Related Product Manufacturing	337	● 1.5	-19.0%	(79)	(49)	-14.5%	-6.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	1,170	● 1.9	16.7%	167	280	23.9%	1.6%
Government	5621	Waste Collection	1,094	● 1.1	31.0%	259	165	15.1%	8.7%
Government	5622	Waste Treatment and Disposal	367	● 0.6	-35.0%	(198)	13	3.5%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	489	● 0.6	37.7%	134	84	17.2%	8.6%
Government	9011	Federal Government, Civilian	10,427	● 0.5	16.0%	1,436	472	4.5%	1.4%
Government	9012	Federal Government, Military	4,788	● 0.3	-2.5%	(121)	26	0.5%	0.8%
Government	9026	Education and Hospitals (State Government)	11,409	● 0.6	9.9%	1,031	126	1.1%	4.3%
Government	9029	State Government, Excluding Education & Hospitals	5,784	● 0.4	-5.9%	(364)	40	0.7%	3.8%
Government	9036	Education and Hospitals (Local Government)	64,729	● 1.1	3.6%	2,255	6,274	9.7%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	36,257	● 1.0	8.0%	2,695	4,077	11.2%	4.8%
Healthcare	6211	Offices of Physicians	16,043	● 1.0	16.2%	2,233	3,668	22.9%	14.0%
Healthcare	6212	Offices of Dentists	5,709	● 1.0	21.5%	1,009	1,372	24.0%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	3,681	● 0.8	18.5%	574	733	19.9%	17.6%
Healthcare	6214	Outpatient Care Centers	3,320	● 0.8	33.2%	827	864	26.0%	15.1%

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Healthcare	6216	Home Health Care Services	4,910	0.6	43.4%	1,485	1,125	22.9%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	1,251	0.7	32.7%	308	31	2.5%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	11,135	0.4	-1.6%	(182)	1,490	13.4%	6.6%
Healthcare	6223	Specialty Hospitals (Private)	1,381	1.0	154.3%	838	324	23.5%	14.7%
Healthcare	6231	Nursing Care Facilities	8,003	0.7	4.6%	352	1,227	15.3%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	3,627	0.9	11.7%	381	743	20.5%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	6,799	1.3	14.4%	858	1,058	15.6%	12.4%
Healthcare	6239	Other Residential Care Facilities	1,627	1.5	-17.4%	(342)	189	11.6%	8.8%
Healthcare	6241	Individual and Family Services	6,172	0.7	17.1%	900	2,514	40.7%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	790	0.8	3.9%	30	191	24.2%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	1,232	0.5	8.1%	92	189	15.3%	10.1%
Healthcare	6244	Child Day Care Services	6,085	1.2	-1.7%	(104)	788	12.9%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	616	0.4	-48.7%	(584)	(152)	-24.7%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	1,635	2.5	-30.6%	(721)	(504)	-30.8%	-13.2%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	559	0.9	27.3%	120	90	16.1%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	838	1.0	-10.1%	(94)	(218)	-26.0%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	966	0.9	-12.2%	(134)	24	2.5%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	1,699	2.7	12.3%	186	(53)	-3.1%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	2,324	1.5	8.1%	174	(67)	-2.9%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	363	1.3	2035.3%	346	(101)	-27.8%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	874	1.0	-30.1%	(377)	(430)	-49.2%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	4,814	1.2	6.5%	294	425	8.8%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	8,596	2.1	-11.6%	(1,126)	242	2.8%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	1,670	0.9	-14.4%	(282)	(198)	-11.9%	4.7%
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	1,156	1.0	-23.9%	(364)	(4)	-0.3%	3.3%
Logging & Metal/Mineral Mii	1131	Timber Tract Operations	49	2.1	16.7%	7	2	4.1%	-0.1%
Logging & Metal/Mineral Mii	1133	Logging	160	0.5	-31.0%	(72)	(5)	-3.1%	-4.2%
Logging & Metal/Mineral Mii	1153	Support Activities for Forestry	124	1.4	47.6%	40	3	2.4%	-0.1%
Logging & Metal/Mineral Mii	2123	Nonmetallic Mineral Mining and Quarrying	446	0.8	-43.5%	(344)	(30)	-6.7%	-2.9%
Materials	3221	Pulp, Paper, and Paperboard Mills	613	0.9	-28.5%	(244)	(125)	-20.4%	-18.9%
Materials	3222	Converted Paper Product Manufacturing	3,093	1.7	5.0%	148	(315)	-10.2%	-10.3%

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Materials	3251	Basic Chemical Manufacturing	714	● 0.8	-25.0%	(238)	(248)	-34.7%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	1,007	● 1.8	-20.3%	(257)	(452)	-44.9%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	460	● 1.3	-9.6%	(49)	49	10.7%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	663	● 1.0	-24.0%	(209)	(80)	-12.1%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	862	● 1.6	-13.0%	(129)	(19)	-2.2%	-7.6%
Materials	3261	Plastics Product Manufacturing	4,709	● 1.5	-15.2%	(847)	(691)	-14.7%	-4.9%
Materials	3262	Rubber Product Manufacturing	1,285	● 1.7	-41.3%	(905)	(208)	-16.2%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	830	● 1.0	-19.4%	(200)	84	10.1%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	1,308	● 1.6	-12.0%	(178)	(102)	-7.8%	-2.6%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	828	● 1.5	5.9%	46	134	16.2%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	330	● 0.9	5.4%	17	10	3.0%	-4.0%
Metalworking	3313	Alumina and Aluminum Production and Processing	170	● 0.5	-61.0%	(266)	(121)	-71.2%	-8.5%
Metalworking	3314	Nonferrous Metal Production and Processing	1,243	● 3.2	9.0%	103	56	4.5%	-7.7%
Metalworking	3315	Foundries	518	● 0.7	-49.4%	(506)	(83)	-16.0%	-11.8%
Metalworking	3321	Forging and Stamping	378	● 0.6	-12.9%	(56)	(58)	-15.3%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	760	● 3.0	3.8%	28	159	20.9%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	2,460	● 1.1	-20.1%	(617)	108	4.4%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	378	● 0.7	-37.6%	(228)	(90)	-23.8%	-5.3%
Metalworking	3325	Hardware Manufacturing	639	● 4.4	-30.8%	(284)	86	13.5%	-12.1%
Metalworking	3326	Spring and Wire Product Manufacturing	268	● 1.0	-48.8%	(255)	(128)	-47.8%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	2,124	● 1.0	-14.3%	(354)	(6)	-0.3%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	664	● 0.8	-14.2%	(110)	(45)	-6.8%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	2,040	● 1.2	-24.1%	(649)	(110)	-5.4%	-5.4%
Metalworking	3365	Railroad Rolling Stock Manufacturing	37	● 0.3		37	3	8.1%	-10.7%
Non-Profits	8131	Religious Organizations	833	● 0.7	6.0%	47	365	43.8%	5.6%
Non-Profits	8132	Grantmaking and Giving Services	496	● 0.6	-8.3%	(45)	69	13.9%	6.9%
Non-Profits	8133	Social Advocacy Organizations	332	● 0.3	-18.4%	(75)	67	20.2%	7.4%
Non-Profits	8134	Civic and Social Organizations	1,848	● 0.7	-61.9%	(3,007)	(369)	-20.0%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	987	● 0.3	-6.1%	(64)	323	32.7%	6.6%
Professional Services	5411	Legal Services	6,376	● 0.9	-1.0%	(65)	539	8.5%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	6,610	● 1.0	-6.1%	(433)	473	7.2%	7.2%

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	3,381	0.8	-1.9%	(65)	276	8.2%	8.5%
Professional Services	5511	Management of Companies and Enterprises	33,027	2.6	11.8%	3,476	2,213	6.7%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	12,335	1.6	22.7%	2,281	4,536	36.8%	28.1%
Research	5417	Scientific Research and Development Services	939	0.2	81.6%	422	170	18.1%	9.8%
Retail	4411	Automobile Dealers	7,452	1.1	-17.0%	(1,530)	486	6.5%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	1,005	1.2	-26.8%	(368)	181	18.0%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	4,519	1.4	3.6%	158	582	12.9%	1.0%
Retail	4421	Furniture Stores	1,478	1.1	-28.9%	(601)	77	5.2%	1.6%
Retail	4422	Home Furnishings Stores	1,953	1.3	-19.3%	(466)	373	19.1%	2.6%
Retail	4431	Electronics and Appliance Stores	4,222	1.3	-11.9%	(573)	(104)	-2.5%	2.9%
Retail	4451	Grocery Stores	15,156	0.9	2.6%	383	(291)	-1.9%	2.3%
Retail	4452	Specialty Food Stores	440	0.3	-44.0%	(346)	(130)	-29.5%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	296	0.3	-11.9%	(40)	(94)	-31.8%	1.7%
Retail	4461	Health and Personal Care Stores	7,707	1.2	0.4%	32	686	8.9%	6.6%
Retail	4471	Gasoline Stations	4,786	0.9	-6.0%	(306)	34	0.7%	-2.3%
Retail	4481	Clothing Stores	7,403	1.0	-8.8%	(710)	1,133	15.3%	3.6%
Retail	4482	Shoe Stores	1,281	1.0	-16.3%	(249)	8	0.6%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	788	0.9	-23.9%	(247)	(46)	-5.8%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	3,122	1.0	-0.3%	(8)	184	5.9%	4.9%
Retail	4512	Book, Periodical, and Music Stores	763	0.9	-21.3%	(207)	10	1.3%	-10.2%
Retail	4521	Department Stores	9,614	1.0	-2.7%	(265)	(138)	-1.4%	-3.3%
Retail	4529	Other General Merchandise Stores	13,044	1.3	20.1%	2,186	3,194	24.5%	15.1%
Retail	4531	Florists	379	0.9	-22.3%	(109)	(16)	-4.2%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	2,363	1.2	-5.3%	(132)	(171)	-7.2%	-7.1%
Retail	4533	Used Merchandise Stores	1,191	1.3	6.0%	67	(47)	-3.9%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	1,640	0.9	3.2%	51	(169)	-10.3%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	295	0.2	120.1%	161	40	13.6%	6.3%
Retail	4542	Vending Machine Operators	241	1.0	13.7%	29	(77)	-32.0%	-0.7%
Retail	4543	Direct Selling Establishments	463	0.5	-15.7%	(86)	(100)	-21.6%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	1,438	1.3	-23.6%	(443)	44	3.1%	2.5%
Retail	5322	Consumer Goods Rental	986	0.8	-32.8%	(481)	(36)	-3.7%	-1.0%

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Retail	5323	General Rental Centers	446	● 1.7	-11.2%	(56)	226	50.7%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	648	● 0.8	-11.1%	(81)	35	5.4%	0.9%
Retail	5331	Lessors of Nonfinancial Intangible Assets	30	● 0.2	-75.2%	(91)	4	13.3%	9.6%
Retail	8111	Automotive Repair and Maintenance	5,285	● 1.0	-3.9%	(216)	692	13.1%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	432	● 1.0	-16.4%	(85)	0	0.0%	-2.2%
Retail	8121	Personal Care Services	3,683	● 0.9	1.7%	61	627	17.0%	11.4%
Retail	8122	Death Care Services	766	● 0.9	-1.8%	(14)	(6)	-0.8%	1.2%
Retail	8123	Drycleaning and Laundry Services	1,940	● 1.0	-24.9%	(642)	(269)	-13.9%	-0.8%
Retail	8129	Other Personal Services	1,673	● 1.0	-9.9%	(184)	47	2.8%	6.0%
Retail	8141	Private Households	1,426	● 0.3	7.9%	105	(57)	-4.0%	13.6%
Software / Info. Tech.	5112	Software Publishers	537	● 0.3	76.6%	233	238	44.3%	13.1%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	5,776	● 3.6	-9.1%	(576)	67	1.2%	15.6%
Software / Info. Tech.	5191	Other Information Services	700	● 0.6	135.7%	403	92	13.1%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	7,062	● 0.7	15.1%	924	840	11.9%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	3,268	● 0.9	-1.6%	(53)	(428)	-13.1%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	975	● 0.9	9.4%	84	(11)	-1.1%	5.1%
Telecom Services	5174	Satellite Telecommunications	10	○ 0.1	-56.5%	(13)	2	20.0%	13.7%
Telecom Services	5179	Other Telecommunications	1,604	● 2.3	-5.6%	(96)	189	11.8%	-4.3%
Transportation & Logistics	4811	Scheduled Air Transportation	6,048	● 2.2	7.0%	398	182	3.0%	1.1%
Transportation & Logistics	4812	Nonscheduled Air Transportation	100	● 0.4	-39.0%	(64)	(21)	-21.0%	7.0%
Transportation & Logistics	4821	Rail Transportation	526	● 0.4	-16.0%	(100)	(9)	-1.7%	0.3%
Transportation & Logistics	4831	Deep Sea, Coastal, & Great Lakes Water Transp.	524	● 2.1	33.7%	132	132	25.2%	2.6%
Transportation & Logistics	4841	General Freight Trucking	9,816	● 1.7	-21.7%	(2,716)	293	3.0%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	1,573	● 0.6	-29.5%	(657)	(65)	-4.1%	4.9%
Transportation & Logistics	4851	Urban Transit Systems	155	● 0.6	-35.4%	(85)	62	40.0%	11.4%
Transportation & Logistics	4852	Interurban and Rural Bus Transportation	737	● 6.3	-1.5%	(11)	36	4.9%	-3.0%
Transportation & Logistics	4853	Taxi and Limousine Service	218	● 0.5	20.4%	37	29	13.3%	1.7%
Transportation & Logistics	4854	School and Employee Bus Transportation	10	○ 0.0		10	5	50.0%	7.4%
Transportation & Logistics	4855	Charter Bus Industry	119	● 0.6	-13.1%	(18)	18	15.1%	0.1%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	94	● 0.2	-40.5%	(64)	9	9.6%	10.6%
Transportation & Logistics	4881	Support Activities for Air Transportation	496	● 0.5	-13.6%	(78)	45	9.1%	10.7%

Centralina Region

Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

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Transportation & Logistics	4882	Support Activities for Rail Transportation	120	● 0.8	25.0%	24	43	35.8%	2.8%
Transportation & Logistics	4884	Support Activities for Road Transportation	799	● 1.4	-7.4%	(64)	202	25.3%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	1,644	● 1.4	-10.0%	(183)	123	7.5%	4.4%
Transportation & Logistics	4889	Other Support Activities for Transportation	490	● 2.8	-24.8%	(162)	21	4.3%	-4.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	3,602	● 1.2	-14.7%	(623)	248	6.9%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	283	● 1.0	64.5%	111	98	34.6%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	4,216	● 1.0	-1.9%	(82)	867	20.6%	7.6%
Total	10	Total	886,699	● 1.0	-5.1%	(47,463)	81,885	9.2%	5.2%

Source: Avalanche Consulting using data from EMSI