



NORTH JERSEY COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

JUNE 2015

VOLUME 2: TECHNICAL REPORT

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ACKNOWLEDGEMENTS

The Together North Jersey (TNJ) Economic Competitiveness and Workforce Development (EC&WD) Committee with guidance from TNJ and the North Jersey Transportation Planning Authority (NJTPA) have led this project. This Committee included:

Community Colleges	NJ Department of Transportation
County Planning and Economic Development Offices	NJ Office for Planning Advocacy
Developers	NJ TRANSIT
Economic Development Corporations	NJ Urban Mayors Association
Edward J. Bloustein School for Planning and Public Policy at Rutgers University	North Jersey Partners
Housing and Urban Development – US and NJ Offices	North Jersey Transportation Planning Authority
Hudson County CEDS Committee	Passaic County Economic Development
Hunterdon County CEDS Committee	PlanSmart NJ
John S. Watson Institute for Public Policy, Thomas Edison State College	Port Authority of New York & New Jersey
Monmouth County Economic Development	Somerset County Business Partnership
New Jersey Chapter of NAIOP	Transportation Management Associations
NJ Department of Environmental Protection	Workforce Investment Boards
NJ Department of Labor and Workforce Development	

The EC&WD Committee reviewed and provided feedback on the process and key deliverables throughout the development of the North Jersey Regional Comprehensive Economic Development Strategy (CEDS).

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INDUSTRY AND OCCUPATIONAL ANALYSIS



MOBILITY

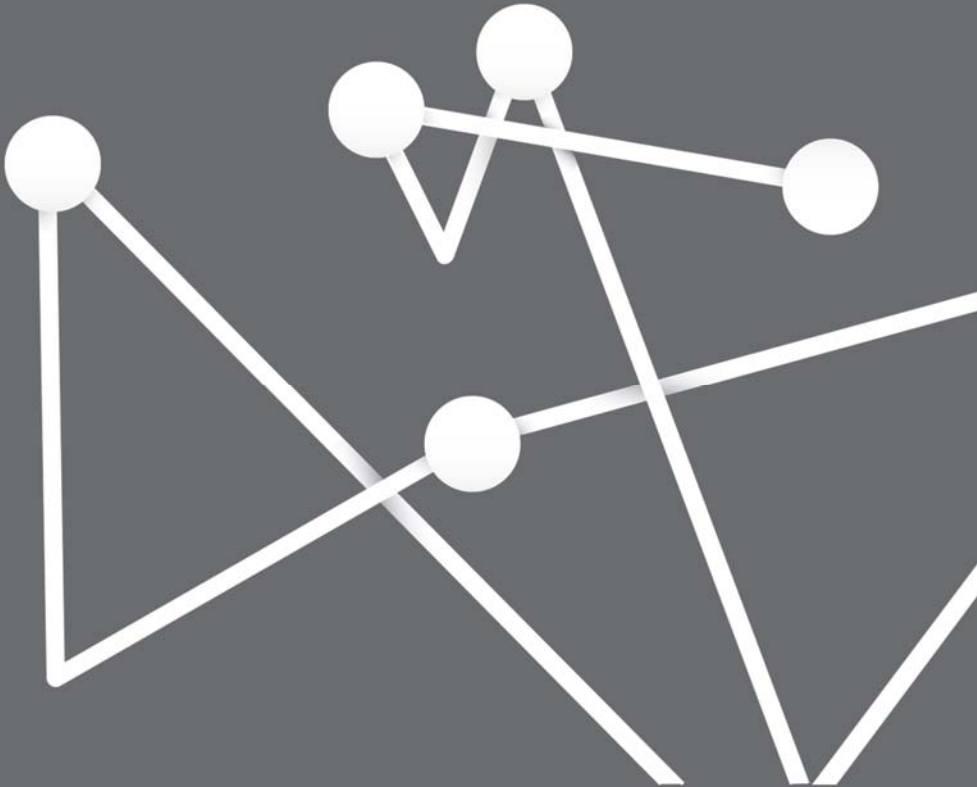
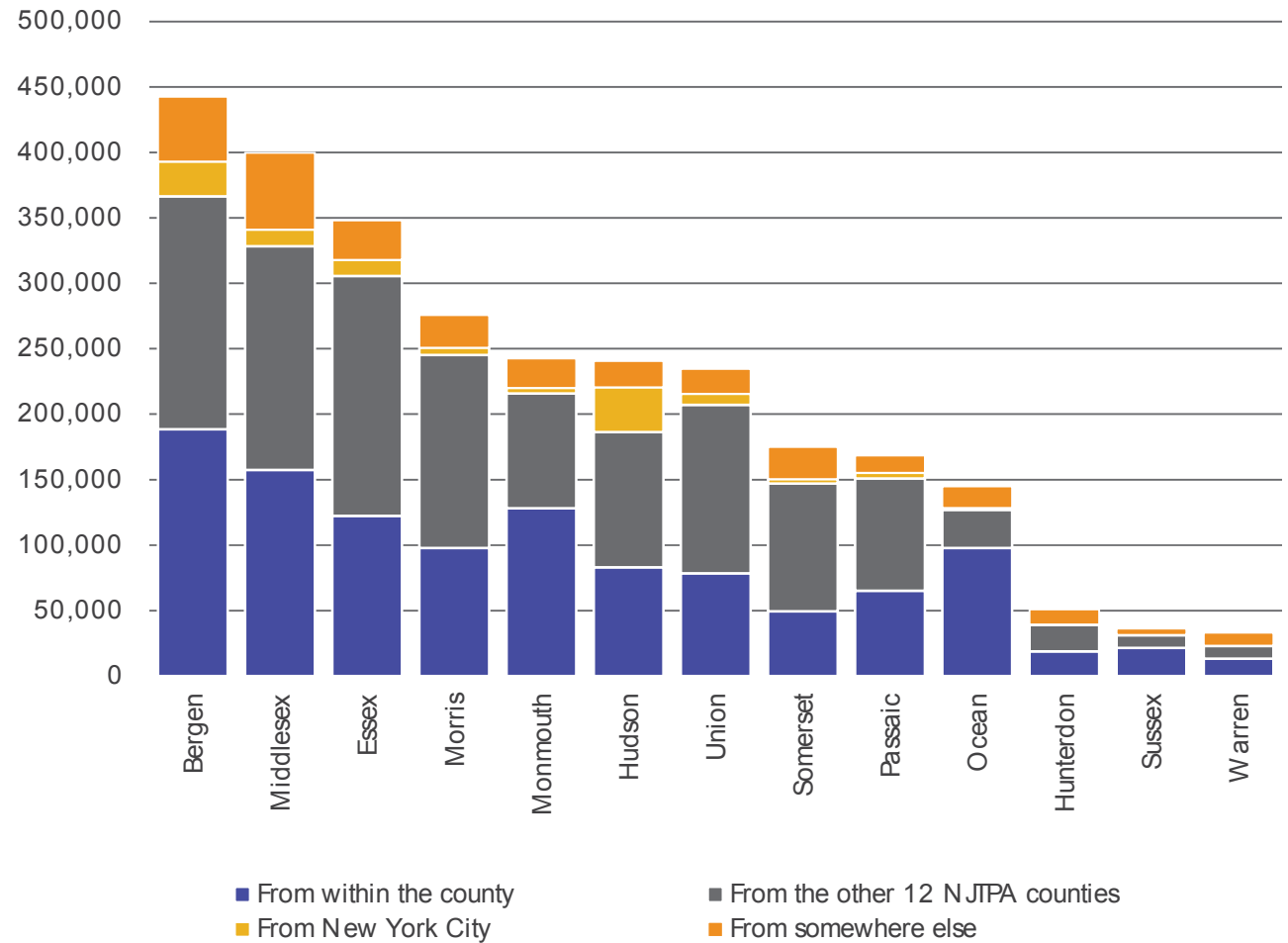


FIGURE 1: THE WORKPLACE VIEW: HOW EMPLOYERS IN EACH COUNTY STAFF JOBS
COMMUTING PATTERNS AS OF 2011

This exhibit shows all the region's jobs by county. The color coding shows where the workers in each county live. It addresses the question of where workers in each county are commuting from.

Staffing patterns vary widely across the region's 13 counties. Bergen, Middlesex, Essex, Morris, and Union Counties are destinations for significant numbers of commuters from other counties in the region. On the other hand, Monmouth and Ocean County employers draw more than half of all workers from within their respective counties. Hudson County picks up a sizable share of reverse commuters from New York City.



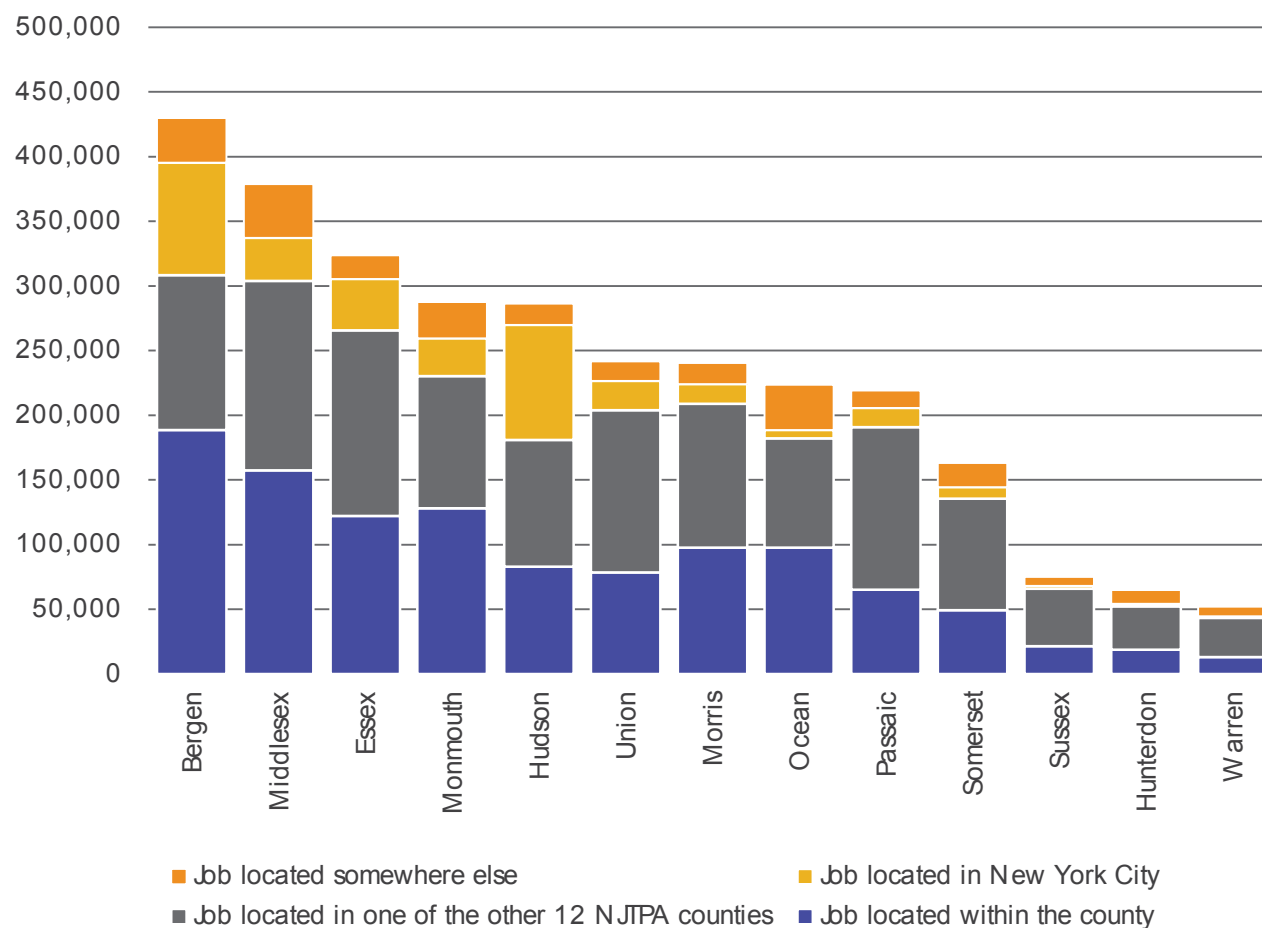
Source: US Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 2: THE HOUSEHOLD VIEW: WHERE EMPLOYED RESIDENTS OF EACH COUNTY WORK
 COMMUTING PATTERNS AS OF 2011

This exhibit addresses the same concept, however, in the other direction. It shows the number of employed residents in each county. The color coding shows where the employed residents of that county actually work. It addresses the question of where they are commuting to.

Again, there is notable variation among each county's commuting patterns. Bergen and Hudson Counties send more of their residents to work in New York City than do other counties in the region. The gravitational pull of New York's employers fades considerably for the region's less-populated, western counties.

These counties—Sussex, Hunterdon, Warren—are also notable because their residents appear to be least likely to work outside the NJTPA region.



Source: US Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 3: DAILY GROSS COMMUTING PATTERNS AMONG THE 13-COUNTY NJTPA REGION

TABLE INDICATES THE TOTAL NUMBERS OF EMPLOYED INDIVIDUALS WHO LIVE AND WORK IN THE 13-COUNTY REGION

Figure 3 summarizes the data extracted from the LED dataset for gross commuting. Columns show place of residence and rows show place of work. For example, there were 13,434 Morris County residents who worked in Passaic County and 15,191 who commuted to New York City in 2011. In addition, 97,706 Morris County residents lived and worked in the county.

		COUNTY OF RESIDENCE												
		Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ
COUNTY OF JOB	Bergen NJ	188,580	25,544	30,427	1,622	12,175	8,224	17,569	5,227	54,344	5,246	5,539	10,269	1,727
	Essex NJ	23,794	122,289	23,424	2,340	17,743	9,824	26,539	5,852	23,177	8,131	4,645	35,417	2,330
	Hudson NJ	25,916	20,455	82,953	898	12,223	7,756	6,432	3,584	8,982	3,827	1,569	10,886	847
	Hunterdon NJ	744	1,052	514	18,734	2,515	1,094	1,926	797	415	4,624	574	1,502	4,325
	Middlesex NJ	9,782	14,537	11,398	6,078	157,479	33,139	9,786	13,771	6,601	30,782	2,311	29,893	2,686
	Monmouth NJ	3,757	3,814	2,863	1,084	21,266	128,117	3,217	39,839	2,205	3,374	980	4,455	800
	Morris NJ	14,578	25,182	7,563	4,599	11,673	6,090	97,706	3,623	19,211	13,310	17,857	14,934	8,951
	Ocean NJ	1,408	1,467	996	420	3,850	16,051	1,015	97,668	1,029	1,088	310	1,373	242
	Passaic NJ	26,652	16,383	6,668	666	4,374	2,957	13,434	2,261	65,210	2,069	4,780	4,448	879
	Somerset NJ	4,100	6,273	3,689	11,098	29,923	6,549	12,393	3,339	2,742	49,407	1,873	11,509	4,148
	Sussex NJ	633	864	249	194	459	332	3,409	274	1,030	302	21,502	379	1,559
	Union NJ	7,838	27,229	10,023	3,043	29,660	9,813	12,848	5,605	5,671	12,871	2,103	78,490	1,803
	Warren NJ	473	425	267	1,545	629	371	2,596	387	316	579	1,754	332	13,150
NYC (5 Boroughs)		86,993	39,939	88,698	2,012	33,326	29,145	15,191	6,338	14,730	8,665	2,368	22,822	1,152
		#	= number living and working in the same county											

Note 1: Not all jobs require daily commuting. Telecommuting is one example. Other occupations (e.g., construction and oilfield work) may sometimes require work in distant locations for extended periods of time.

Note 2: Employment is based on 2011 estimates derived from a range of government sources. Totals will not directly match other data sources.

Note 3: Commuting levels to New York City are shown for comparative purposes only.

Source: US Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 4: DAILY SCALED COMMUTING PATTERNS AMONG THE 13-COUNTY NJTPA REGION

FOR EVERY 100 COUNTY RESIDENTS WHO WORK IN THE COUNTY, HOW MANY COMMUTE? (READ VERTICALLY)

Gross commuting data can be difficult to contextualize, especially when the analysis includes counties of very different sizes. It, therefore, can help to scale the data. The following chart presents the gross commuting data as per 100 residents working in the county. For example, in Morris County, for every 100 residents who live and work in the county, another 14 residents have an employer in Passaic County and 16 work in New York City.

The scaled example is helpful because patterns that might not have been obvious before are easier to see. Take Hudson County, for example. For every 100 residents who live and work in the county, there are another 107 who work in New York City.

		COUNTY OF RESIDENCE												
		Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ
COUNTY OF JOB	Bergen NJ	100	21	37	9	8	6	18	5	83	11	26	13	13
	Essex NJ	13	100	28	12	11	8	27	6	36	16	22	45	18
	Hudson NJ	14	17	100	5	8	6	7	4	14	8	7	14	6
	Hunterdon NJ	<1	1	1	100	2	1	2	1	1	9	3	2	33
	Middlesex NJ	5	12	14	32	100	26	10	14	10	62	11	38	20
	Monmouth NJ	2	3	3	6	14	100	3	41	3	7	5	6	6
	Morris NJ	8	21	9	25	7	5	100	4	29	27	83	19	68
	Ocean NJ	1	1	1	2	2	13	1	100	2	2	1	2	2
	Passaic NJ	14	13	8	4	3	2	14	2	100	4	22	6	7
	Somerset NJ	2	5	4	59	19	5	13	3	4	100	9	15	32
	Sussex NJ	<1	1	<1	1	<1	<1	3	<1	2	1	100	<1	12
	Union NJ	4	22	12	16	19	8	13	6	9	26	10	100	14
	Warren NJ	<1	<1	<1	8	<1	<1	3	<1	<1	1	8	<1	100
NYC (5 Boroughs)		46	33	107	11	21	23	16	6	23	18	11	29	9
		# = number living and working in the same county												

Note 1: Not all jobs require daily commuting. Telecommuting is one example. Other occupations (e.g., construction and oilfield work) may sometimes require work in distant locations for extended periods of time.

Note 2: Employment is based on 2011 estimates derived from a range of government sources. Totals will not directly match other data sources.

Note 3: Commuting levels to New York City are shown for comparative purposes only.

Source: US Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 5: DAILY NET COMMUTING PATTERNS AMONG THE 13-COUNTY NJTPA REGION

THE NET IS THE DIFFERENCE BETWEEN THE GROSS NUMBER OF DAILY COMMUTERS INTO AND OUT OF THE COUNTY

So far, the mobility analysis has looked only at gross commuting patterns, including a scaled a view that is easier to contextualize. This chart looks at the net commuting patterns for each of the counties. Inter-county commuting patterns within the North Jersey region highlight the scale and patterns of economic integration. Even though Bergen County has the largest net commuter outflow to New York (60,602), it still managed to have a net inflow from the other 12 counties in the NJTPA region. Essex County also drew net inbound commuting from every NJTPA county except for Bergen. Sussex was the only county in the region that had net outflow in 2011 to all 12 of the other counties (and most of these Sussex County workers were headed to Morris County).

All 13 counties showed some degree of net outbound commuting into New York, with differences depending largely on the size and proximity of each county.

		COUNTY OF RESIDENCE													
		Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ	
COUNTY OF JOB	Bergen NJ	—	-1,750	4,511	-878	-2,393	-4,467	-2,991	-3,819	-27,692	-1,146	4,906	-2,431	-1,254	
	Essex NJ	1,750	—	-2,969	-1,288	-3,206	-6,010	-1,357	-4,385	-6,794	-1,858	-3,781	-8,188	-1,905	
	Hudson NJ	4,511	2,969	—	-384	-825	-4,893	1,131	-2,588	-2,314	-138	-1,320	-863	-580	
	Hunterdon NJ	878	1,288	384	—	3,563	-10	2,673	-377	251	6,474	-380	1,541	-2,780	
	Middlesex NJ	2,393	3,206	825	-3,563	—	-11,873	1,887	-9,921	-2,227	-859	-1,852	-233	-2,057	
	Monmouth NJ	4,467	6,010	4,893	10	11,873	—	2,873	-23,788	752	3,175	-648	5,358	429	
	Morris NJ	2,991	1,357	-1,131	-2,673	-1,887	-2,873	—	-2,608	-5,777	-917	-14,448	-2,086	-6,355	
	Ocean NJ	3,819	4,385	2,588	377	9,921	23,788	2,608	—	1,232	2,251	-36	4,232	145	
	Passaic NJ	27,692	6,794	2,314	-251	2,227	-752	5,777	-1,232	—	673	-3,750	1,223	-563	
	Somerset NJ	1,146	1,858	138	-6,474	859	-3,175	917	-2,251	-673	—	-1,571	1,362	-3,569	
	Sussex NJ	4,906	3,781	1,320	380	1,852	648	14,448	36	3,750	1,571	—	1,724	195	
	Union NJ	2,431	8,188	863	-1,541	233	-5,358	2,086	-4,232	-1,223	-1,362	-1,724	—	-1,471	
	Warren NJ	1,254	1,905	580	2,780	2,057	429	6,355	-145	563	3,569	-195	1,471	—	
NYC (5 Boroughs)		-60,602	-27,516	-54,438	-1,549	-20,590	-24,799	-9,791	-4,892	-10,349	-5,349	-2,112	-14,243	-905	
		#	= net commuting is "0" for those who live and work in the same county												

Note 1: Not all jobs require daily commuting. Telecommuting is one example. Other occupations (e.g., construction and oilfield work) may sometimes require work in distant locations for extended periods of time.

Note 2: Employment is based on 2011 estimates derived from a range of government sources. Totals will not directly match other data sources.

Note 3: Commuting levels to New York City are shown for comparative purposes only.

Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 6: NET INTER-COUNTY COMMUTING DIFFERENCES ACROSS ECONOMIC SECTORS
NET COMMUTING PATTERNS AS OF 2011

The first series of mobility exhibits considered only the geographic component of commuting, i.e., the simple difference between where residence and employer are located. The next two exhibits address sectoral and socio-economic aspects.

The table on the following page shows net commuting balances for each county across economic sectors. Bergen County's inbound commuting effect is strongest for jobs in manufacturing and wholesale trade. However, Many Bergen County residents who work in the finance/insurance sector are headed to work somewhere else, most of them presumably to New York City.

High levels of net outbound commuting at the sectoral level are important to note, as they provide a clue to each county's hidden workforce strengths that will not be reflected in most other industry or occupational data. This is because sectoral employment data are typically based on where the job is located, not where the employee lives. A region with high levels of outbound commuting in one or more sectors may have stronger workforce capacity than its nominal employment base otherwise reveals.

	Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ
Agriculture, Forestry, Fishing & Hunting	+8	-123	-63	+406	-130	+237	+36	-287	-121	-6	-52	-87	-29
Mining, Quarrying, & Oil & Gas Extraction	-55	-36	+36	+10	-17	-36	-18	-14	+39	+208	-29	-21	+13
Utilities	-578	+196	+446	-168	-653	-239	-178	-678	-13	-243	-240	+710	-72
Construction	+83	+298	-2,753	+457	+157	-609	+1,845	-4,157	-1,116	-106	-2,107	+653	-1,063
Manufacturing	+10,054	+3,573	-4,743	-2,525	+6,484	-3,430	+6,482	-5,139	-1,336	+3,287	-3,448	+4,230	-351
Wholesale Trade	+10,123	-771	-1,323	+614	+10,130	-5,086	+3,111	-6,496	-4,794	+305	-3,151	+714	-1,733
Retail Trade	+7,698	-3,830	-3,836	-1,079	+1,252	+1,074	+4,293	-6,456	-2,830	+2,738	-4,373	+2,896	-972
Transportation & Warehousing	-900	+10,500	+7,980	-961	+6,319	-4,697	+995	-4,742	-3,795	-764	-1,742	+1,539	-499
Information	-4,980	-2,220	-2,358	-723	+261	-1,837	-593	-2,899	-1,944	+1,631	-1,198	-1,412	-909
Finance & Insurance	-13,365	+19	+7,961	-722	-7,791	-7,885	-597	-4,863	-3,660	+371	-2,616	-5,880	-1,610
Real Estate & Rental & Leasing	-1,030	-18	-2,536	-494	-65	-1,438	+1,005	-1,189	-1,315	-21	-719	-1,052	-450
Professional, Scientific, & Technical Services	-3,716	+2,128	-12,678	-2,107	+87	-6,132	+6,375	-7,981	-6,794	+352	-4,015	-81	-2,583
Management of Companies & Enterprises	+6,135	-1,748	-2,316	-914	-620	-2,828	-147	-2,179	-48	+4,109	-865	+269	-936
Administration & Waste Management	+1,661	-3,458	-6,285	-1,481	+9,176	-3,067	+7,586	-4,858	-3,560	+2,233	-2,630	-196	-1,520
Educational Services	-6,726	+12,683	-182	-1,938	+5,382	-4,138	-2,474	-7,273	-858	-2,460	-2,447	-2,847	-1,440
Health Care & Social Assistance	+9,480	+4,390	-10,871	-929	-3,885	-2,371	+5,040	-6,544	-10,974	+612	-4,441	-3,247	-1,741
Arts, Entertainment, & Recreation	+886	-594	-2,315	+57	-1,467	+325	+596	-371	-1,586	+443	-383	-923	-339
Accommodation & Food Services	+2,779	-1,857	-6,442	-510	-752	+784	+2,977	-5,119	-4,010	+802	-1,703	-1,483	-899
Other Services (including Personal Services)	-1,622	+1,138	-4,400	-398	+1,035	-747	+429	-2,310	-1,347	-305	-1,110	+1,193	-549
Public Administration	-3,252	+4,260	+1,002	-610	-3,932	-2,941	-1,373	-5,450	-648	-1,329	-1,408	-2,051	-1,200

 Net Inbound (net commuting INTO the county)
 Net Outbound (net commuting OUT FROM the county)

Note: Darker colors convey greater commuting discrepancies.

Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2011

FIGURE 7: NET INTER-COUNTY COMMUTING DIFFERENCES ACROSS SOCIO-DEMOGRAPHIC VARIABLES
 NET COMMUTING PATTERNS AS OF 2011

Net commuting effects can be further dissected and analyzed along socio-economic lines. Bergen County, for example, draws a net surplus of commuters for jobs with annual earnings of less than \$40,000, but the county produces a net outflow for jobs that pay above this level. This is mirrored in commuting patterns for Bergen County based on educational attainment, i.e., net outbound commuting for jobs requiring more education, net inbound flows for workers with lower levels of education.

	Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ
AGE													
Under 30	+8,387	-2,480	-21,846	-1,612	+4,928	-3,721	+9,246	-12,740	-12,623	+4,067	-6,773	-2,788	-3,307
30 to 54	+3,889	+16,307	-23,331	-8,500	+8,983	-31,128	+21,483	-47,395	-30,868	+6,855	-23,595	-6,303	-11,873
55+	+407	+10,703	-499	-3,903	+7,060	-10,212	+4,661	-18,870	-7,219	+935	-8,309	+2,015	-3,702
EARNINGS													
Under \$15,000	+16,371	-3,482	-11,171	-2,013	+5,723	-424	+8,867	-11,763	-9,857	+1,899	-6,355	-518	-3,232
\$15,000 to \$39,999	+24,723	-2,425	-17,465	-442	+13,978	+2,612	+17,387	-18,848	-18,216	+5,683	-7,330	-2,398	-3,760
\$40,000+	-28,411	+30,437	-17,040	-11,560	+1,270	-47,249	+9,136	-48,394	-22,637	+4,275	-24,992	-4,160	-11,890

 Net Inbound (net commuting INTO the county)
  Net Outbound (net commuting OUT FROM the county)

Some patterns may come as a surprise. Asians are net outbound commuters in Bergen, Middlesex, and Somerset Counties, even though all other major racial and ethnic groups in those three counties are net inbound commuters. Other significant net commuting differences across age cohorts and gender can also be parsed in this dataset.

	Bergen NJ	Essex NJ	Hudson NJ	Hunterdon NJ	Middlesex NJ	Monmouth NJ	Morris NJ	Ocean NJ	Passaic NJ	Somerset NJ	Sussex NJ	Union NJ	Warren NJ
SELECTED RACE/ ETHNICITY*													
White	+11,198	+47,802	-27,236	-14,781	+33,086	-42,327	+19,662	-77,548	-39,529	+11,486	-36,770	+4,611	-17,516
Black	+12,166	-28,446	-3,351	+970	+9,549	+344	+14,689	-199	-6,470	+2,266	-534	-13,946	-729
Asian	-10,574	+5,267	-12,357	-104	-22,159	-2,625	+130	-451	-3,394	-2,153	-897	+2,570	-433
Hispanic	+15,977	+4,875	-28,133	+214	+6,400	+707	+10,515	-3,742	-22,114	+2,321	-2,665	-8,248	-1,209
EDUCATIONAL ATTAINMENT													
Less than high school	+7,643	-547	-7,158	-323	+3,825	-1,345	+3,943	-3,958	-6,093	+546	-1,796	-1,426	-924
High school or equivalent, no college	+6,397	+2,753	-6,382	-1,426	+6,791	-4,030	+7,138	-13,634	-7,440	+966	-6,069	-444	-2,338
Some college or Associate degree	+3,961	+6,878	-5,868	-3,217	+7,138	-9,250	+8,373	-19,919	-10,214	+2,005	-9,066	-1,392	-4,227
Bachelor's degree or advanced degree	-13,705	+17,926	-4,422	-7,437	-1,711	-26,715	+6,690	-28,754	-14,340	+4,273	-14,973	-1,026	-8,086
GENDER													
Male	+1,004	+13,550	-17,175	-7,904	+15,184	-32,735	+15,269	-44,212	-23,954	+4,904	-21,533	+781	-10,274
Female	+11,679	+10,980	-28,501	-6,111	+5,787	-12,326	+20,121	-34,793	-26,756	+6,953	-17,144	-7,857	-8,608



Net Inbound (net commuting INTO the county)



Net Outbound (net commuting OUT FROM the county)

Note: Darker colors convey greater commuting discrepancies.

*The Hispanic population may be of any race and is not mutually exclusive from the other racial categories listed.

Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2011

OCCUPATIONS

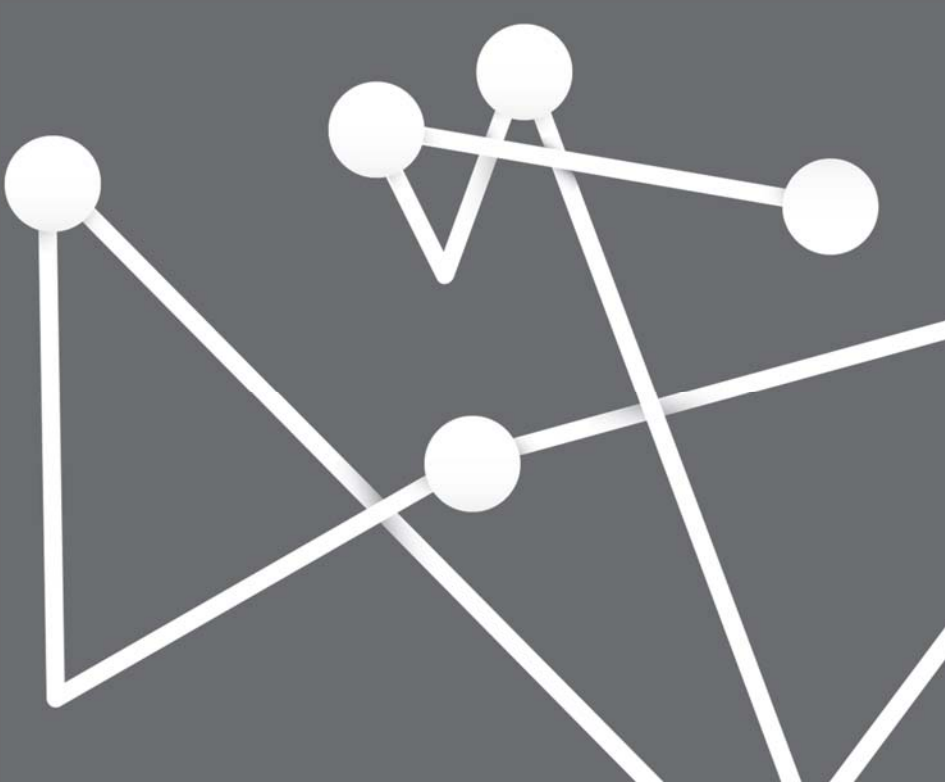
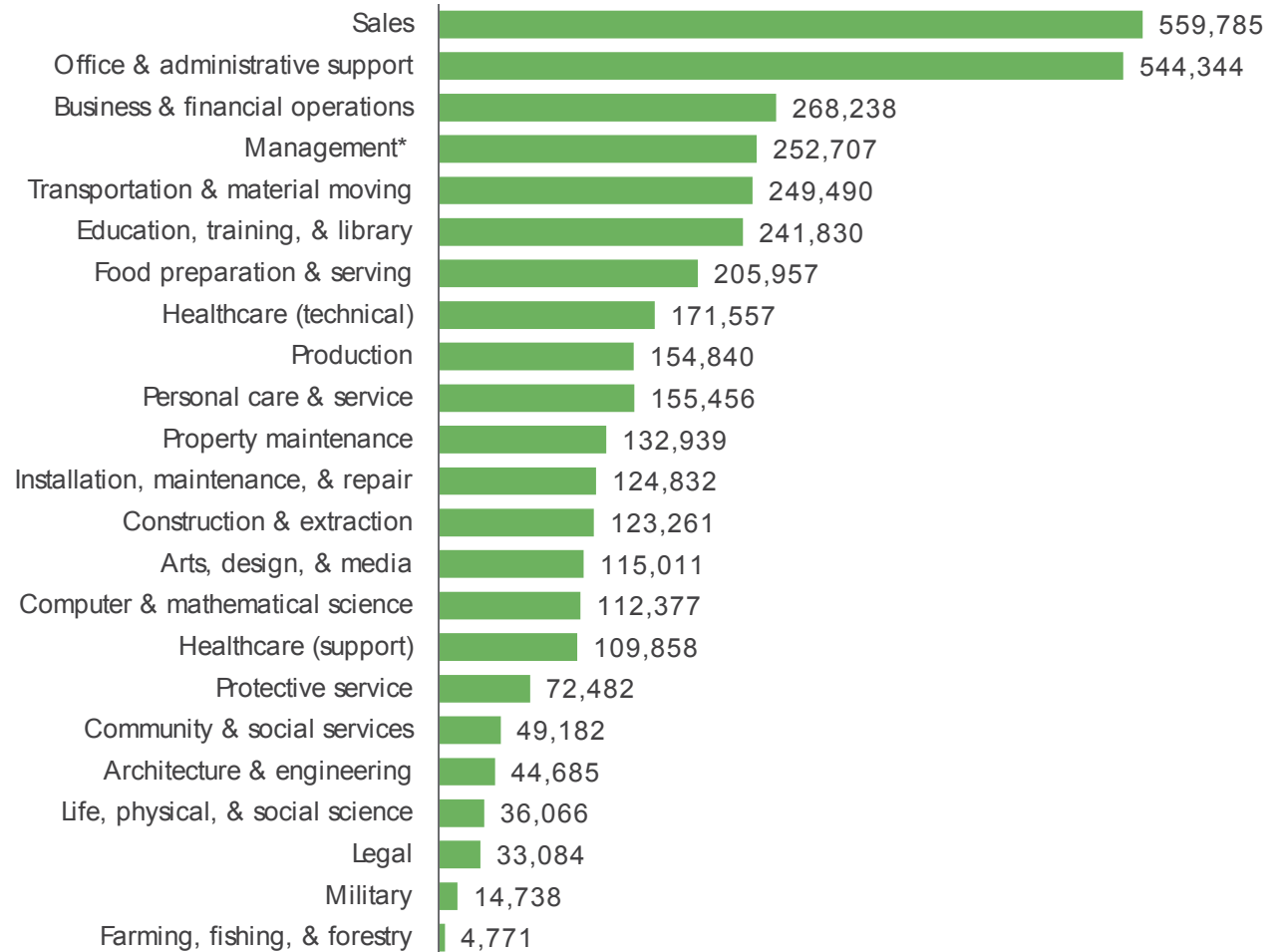


FIGURE 8: 2012 JOB BASE BY OCCUPATIONAL GROUP IN THE 13-COUNTY NORTH JERSEY REGION

Nearly 30% of total jobs in the region's workforce fall into two occupational groups: sales and admin support.

Other broad occupational groups with large absolute employment levels include business, management, transportation, and education.



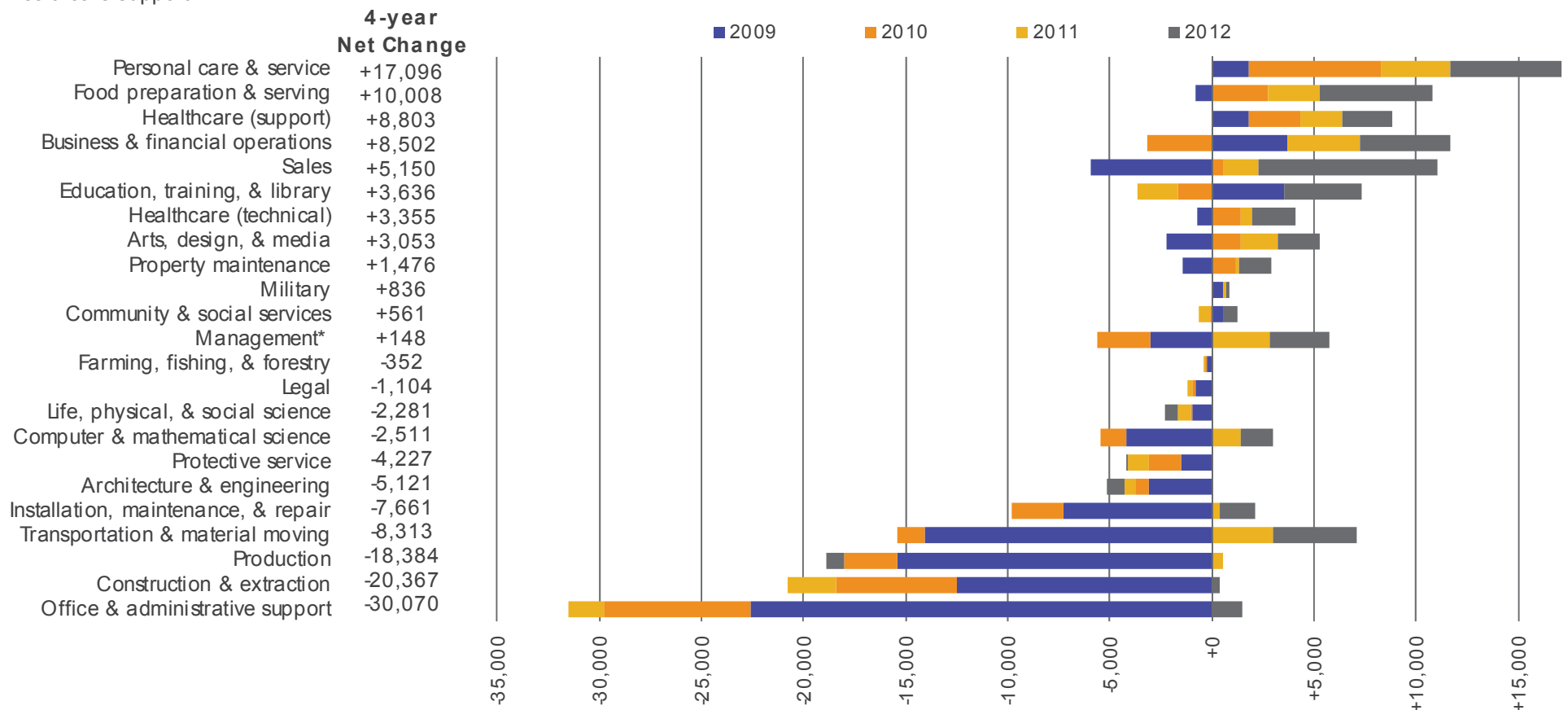
*NOTE: Management occupations include self-employed real estate agents, farmers & ranchers, as well as construction managers and general managers.

Source: EMSI Complete Employment–2013.4

FIGURE 9: OCCUPATIONAL JOB TRENDS IN THE 13-COUNTY REGION, 2009 THROUGH 2012
WIDE DIFFERENCES IN OCCUPATIONAL VOLATILITY OVER THE PAST FOUR YEARS

The Great Recession hit some occupational groups far more heavily than others. This is not unique to New Jersey. It is a pattern seen nationwide in both urban and rural areas. In 2009, the occupations taking the hardest hit in the North Jersey region were concentrated in administrative support, construction, production, transportation, and repair services. At the end of 2012, these occupational groups had regained little of their cyclical losses.

The jobs with the best growth during the recovery (at least through 2012) were largely in lower wage occupations such as personal services, food preparation, and healthcare support.



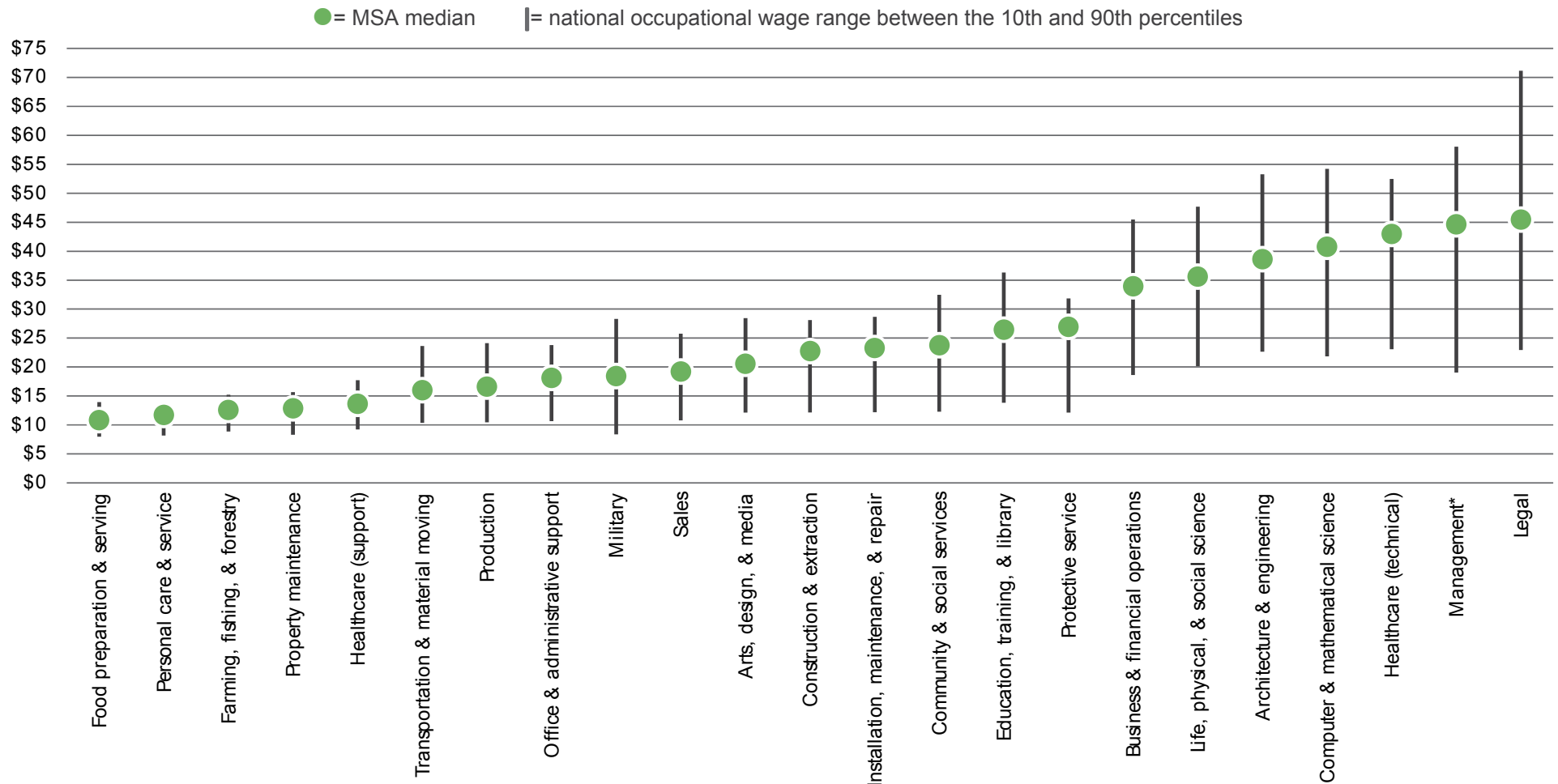
*NOTE: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers.

Source: EMSI Complete Employment–2013.4

FIGURE 10: MEDIAN HOURLY WAGE RATE BY OCCUPATIONAL GROUP

NJTPA MEDIAN WAGE PRESENTED IN THE CONTEXT OF THE NATIONAL WAGE RANGE

In most occupational categories, the median wage in the NJTPA region falls into the upper half of the national wage range. A relatively high regional wage level is most notable among workers in protective services occupations.



*NOTE: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers.

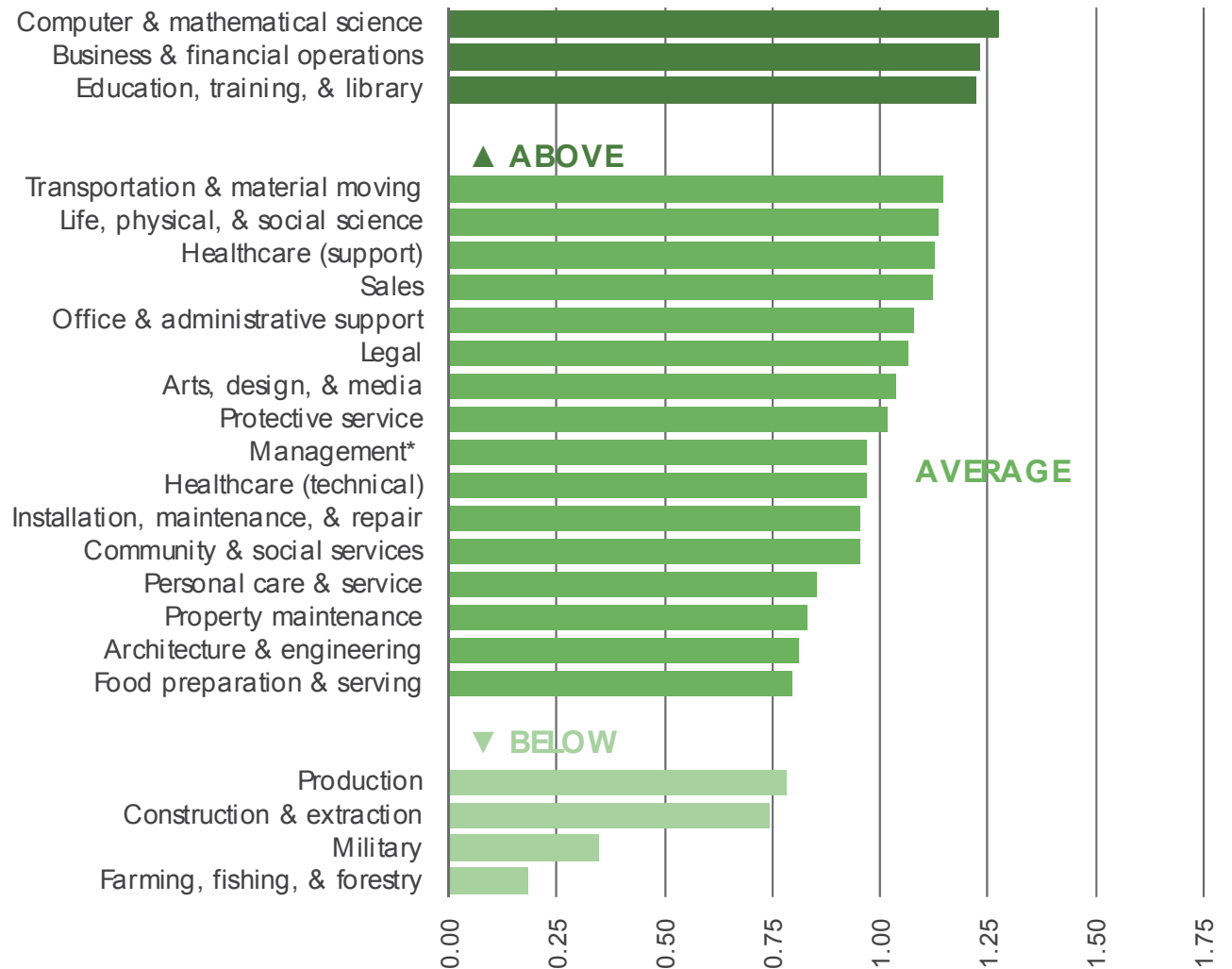
Source: EMSI Complete Employment–2013.4

FIGURE 11: OCCUPATIONAL GROUP CONCENTRATIONS IN NJTPA
LOCATION QUOTIENT ANALYSIS

Location quotients (LQs) indicate strengths and weaknesses in the employment base relative to the US overall. Theoretically, higher LQs imply specialization in a local economy and are often viewed by economists as export industries.

Only three of the region's occupational groups—IT, finance, and education—show location quotients that are considered above average. This is important since these are skilled occupational groups with solid pay levels and generally good employment prospects.

US average for each industry = 1.00
regional strength > 1.20
regional weakness < 0.80



*NOTE: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers.

Source: EMSI Complete Employment–2013.4

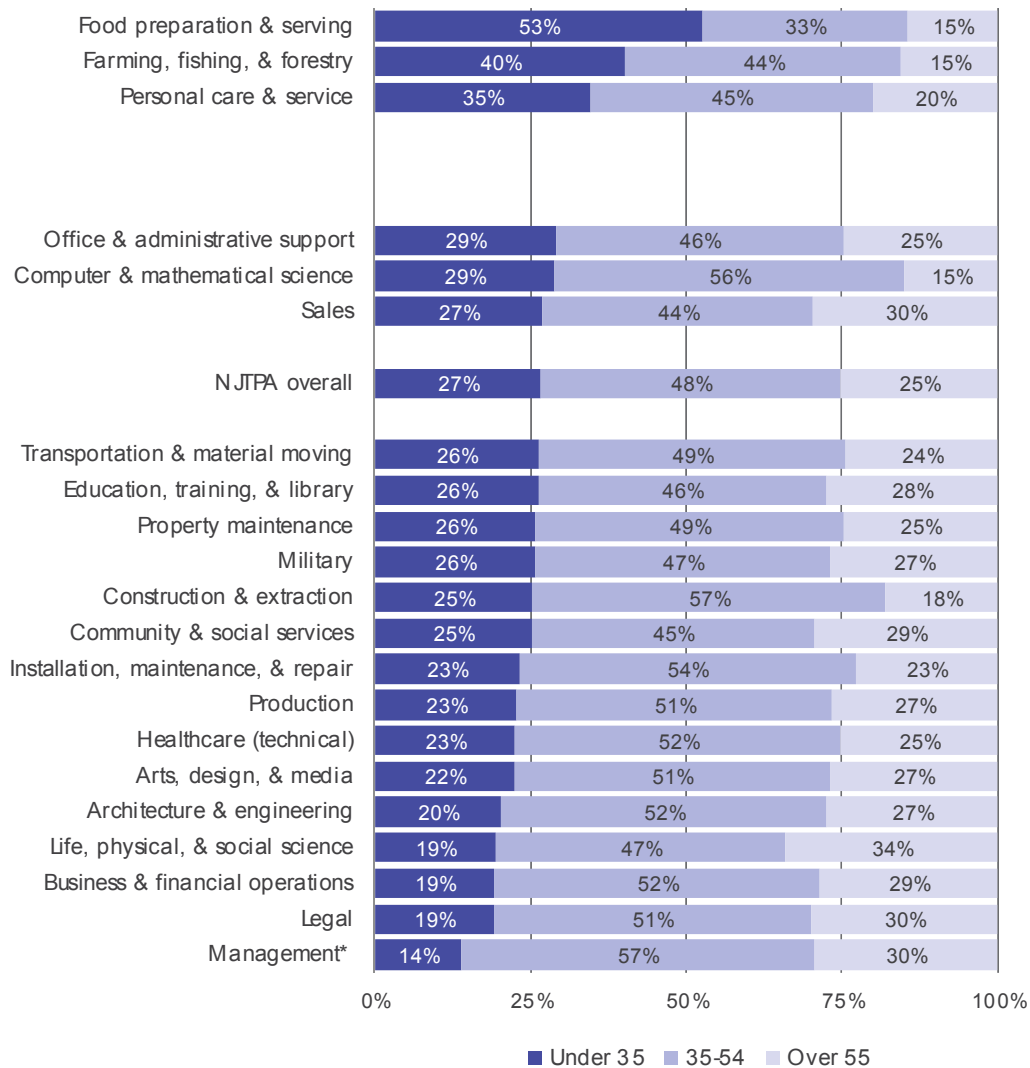
FIGURE 12: NJTPA'S OCCUPATIONAL MIX BY AGE AND GENDER

Differences are to be expected in the ages of workers across occupational groups. This is especially true for food preparation, which serves as an entryway into the workforce for many younger workers. As workers gain experience, they typically move out of food services and into other occupations. Conversely, only a small share of managerial workers can be identified below the age of 35. This makes sense as well, as these posts tend to be filled by more experienced workers. These types of age-skewed local patterns are also very common national patterns.

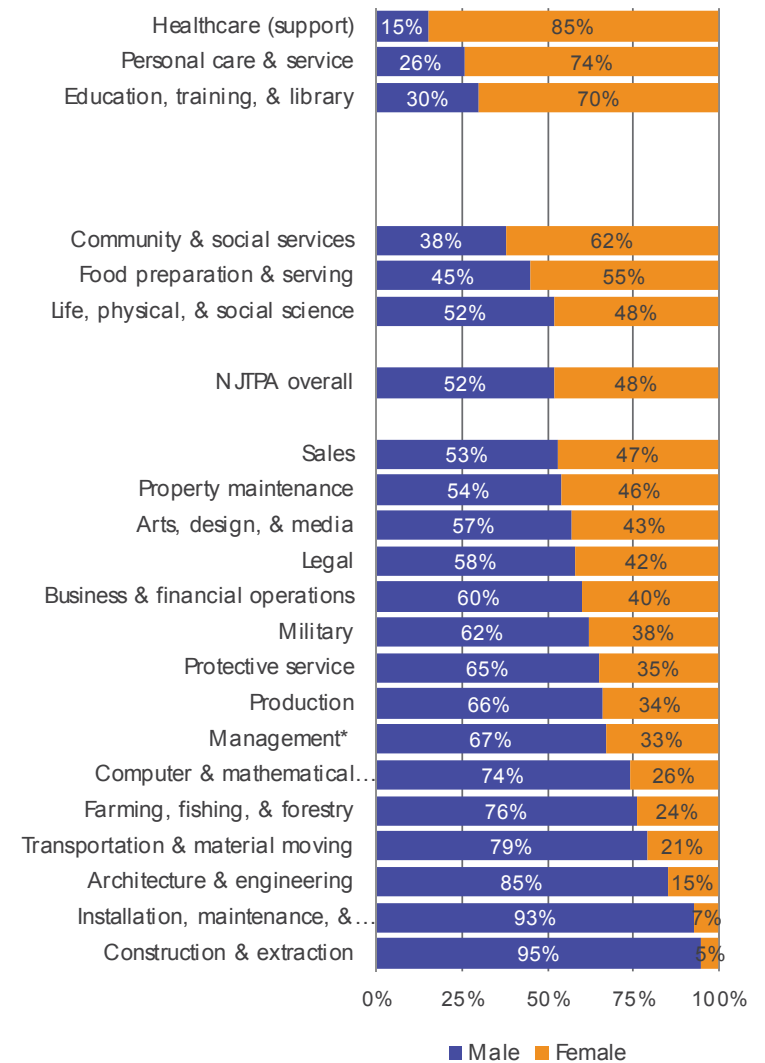
It is the pattern of employment by age cohort that deserves more attention. One issue for the North Jersey region is whether younger workers are being trained to fill skilled positions so they can replace older, retiring workers. In some parts of the US, this is a serious problem. For computer/IT work, the region's age balance looks adequate. In this field, there are twice as many jobs filled by those under the age of 35 as jobs filled by those over 55. In other words, forthcoming retirements should not be a major shock for employers. For science-related occupations, the age structure may pose more of an issue since workers age 55+ hold seven jobs for every four jobs staffed by workers under the age of 35.

Occupational employment is heavily skewed along gender lines. Female workers are far more likely to be employed in the region's healthcare, education, personal service, and administrative office occupations. Male workers cluster heavily in construction, maintenance, repair, engineering, and transportation fields. While these gender patterns are dramatic, they are not unusual. Similar patterns of gender-related employment are common throughout the US.

AGE



GENDER



*NOTE: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers.

Source: EMSI Complete Employment–2013.4

INDUSTRIES

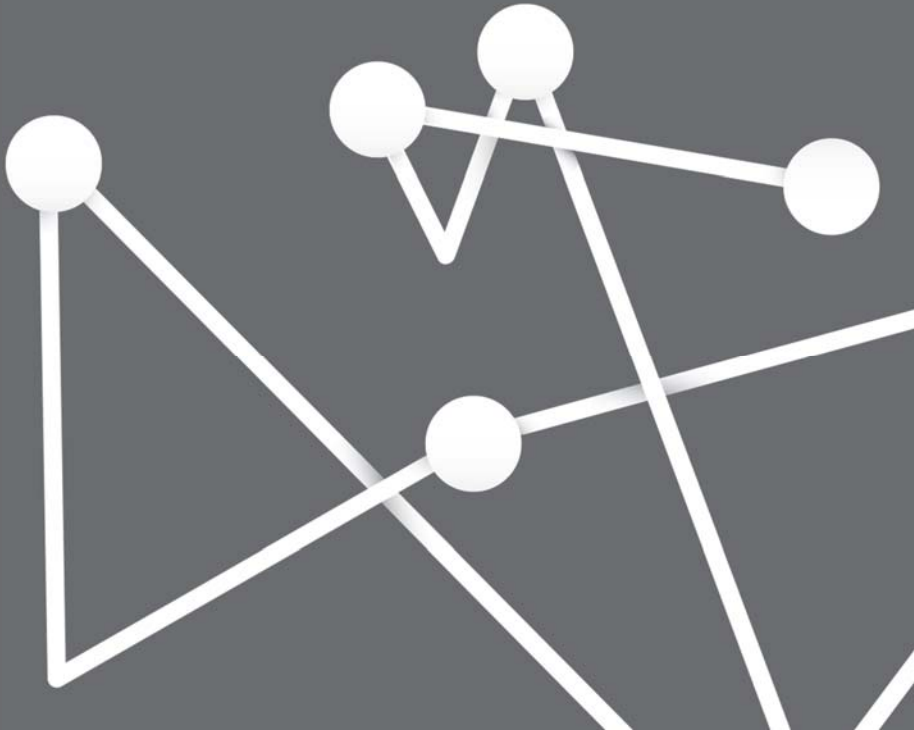
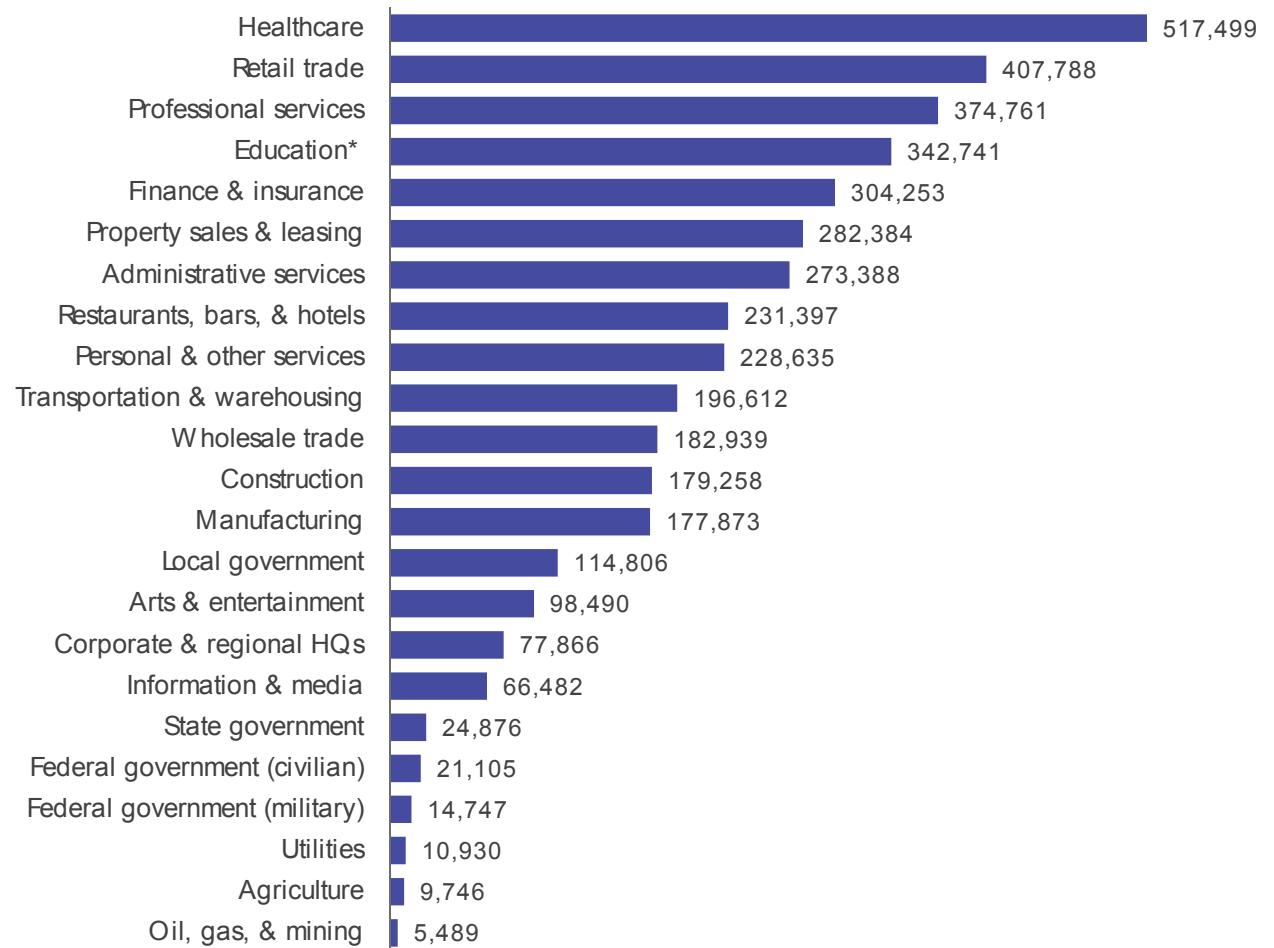


FIGURE 13: JOB BASE BY INDUSTRY SECTOR IN THE 13-COUNTY NJTPA REGION
AS OF 2012

Although they appear similar, Industry-level employment and occupational-level employment are not the same thing. Consider the region's top employing industry (healthcare). As an industry, it employs more than a half-million workers in the region, but as TIP's occupational analysis showed in previous exhibits, healthcare occupations (both technical and support) together employ only 282,000 workers. So what about remaining workers employed in this industry? They are likely to be classified in other supporting occupations such as office administration. It would, therefore, be a mistake to assume that 500,000 jobs in the healthcare sector equates to 500,000 high-skilled, high-paying jobs.

The level of employment in professional services and finance/insurance is notable as well, as these sectors rank as the region's third and fifth largest employers, respectively. Such high rankings for these sectors tend to occur only in the largest and most urban areas of the US.



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

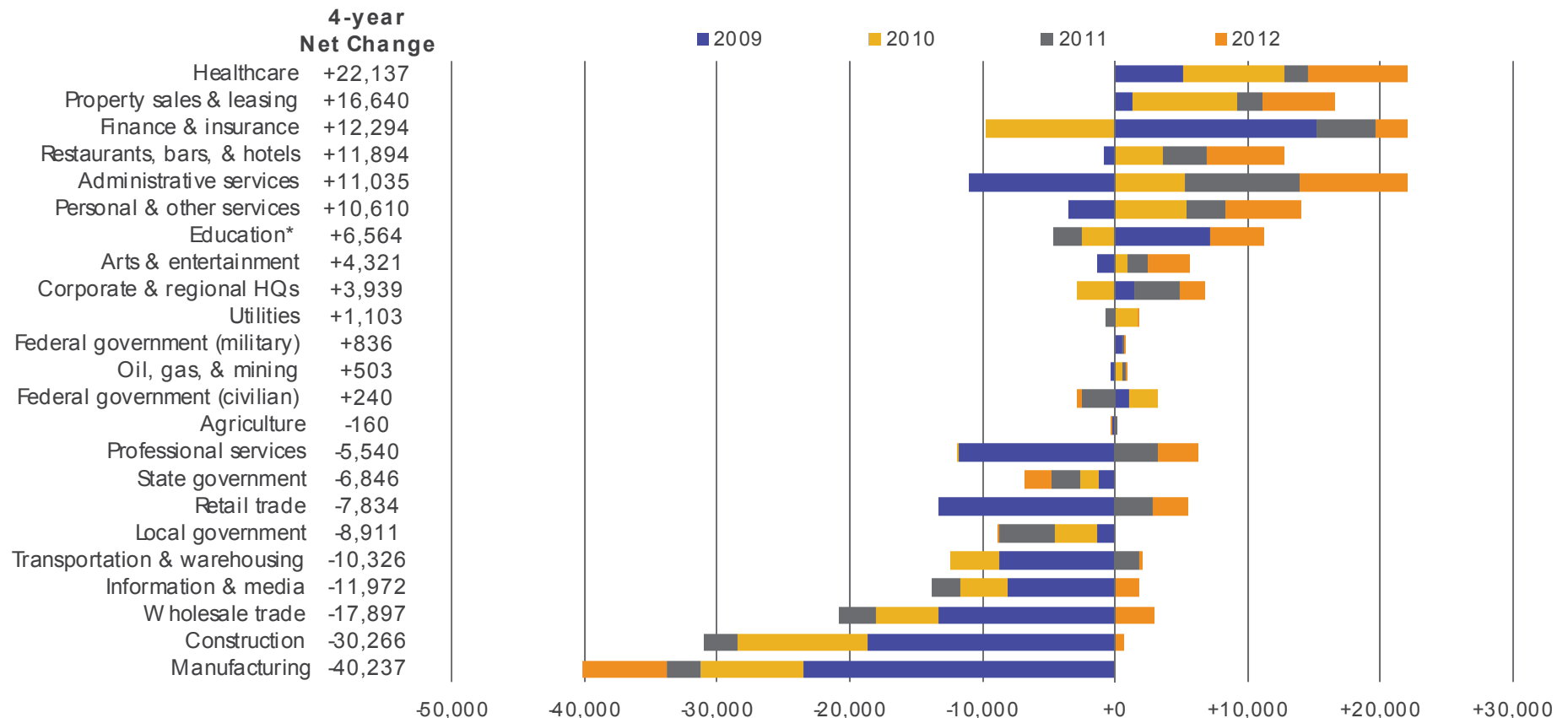
Source: EMSI Complete Employment–2013.4

FIGURE 14: JOB TRENDS BY ECONOMIC SECTOR IN THE 13-COUNTY NJTPA REGION

A WIDE GAP IN THE TYPES OF JOBS GAINED AND LOST FROM 2009 TO 2012

An earlier exhibit on net job change over the past four years showed that occupational groups such as administrative support, construction, production, transportation, and repair services suffered significant job losses during the recent recession. Not surprisingly, those occupations align to some extent with industries such as manufacturing, construction, trade, and distribution, all of which experienced heavy job losses in the North Jersey region during the recession.

As this exhibit shows, a number of industries continued to grow throughout the recession and are still adding jobs at a solid pace. Compare this upbeat pattern to those industries that lost jobs: as of 2012, the sectors with the heaviest job losses had shown only marginal signs of recovery.



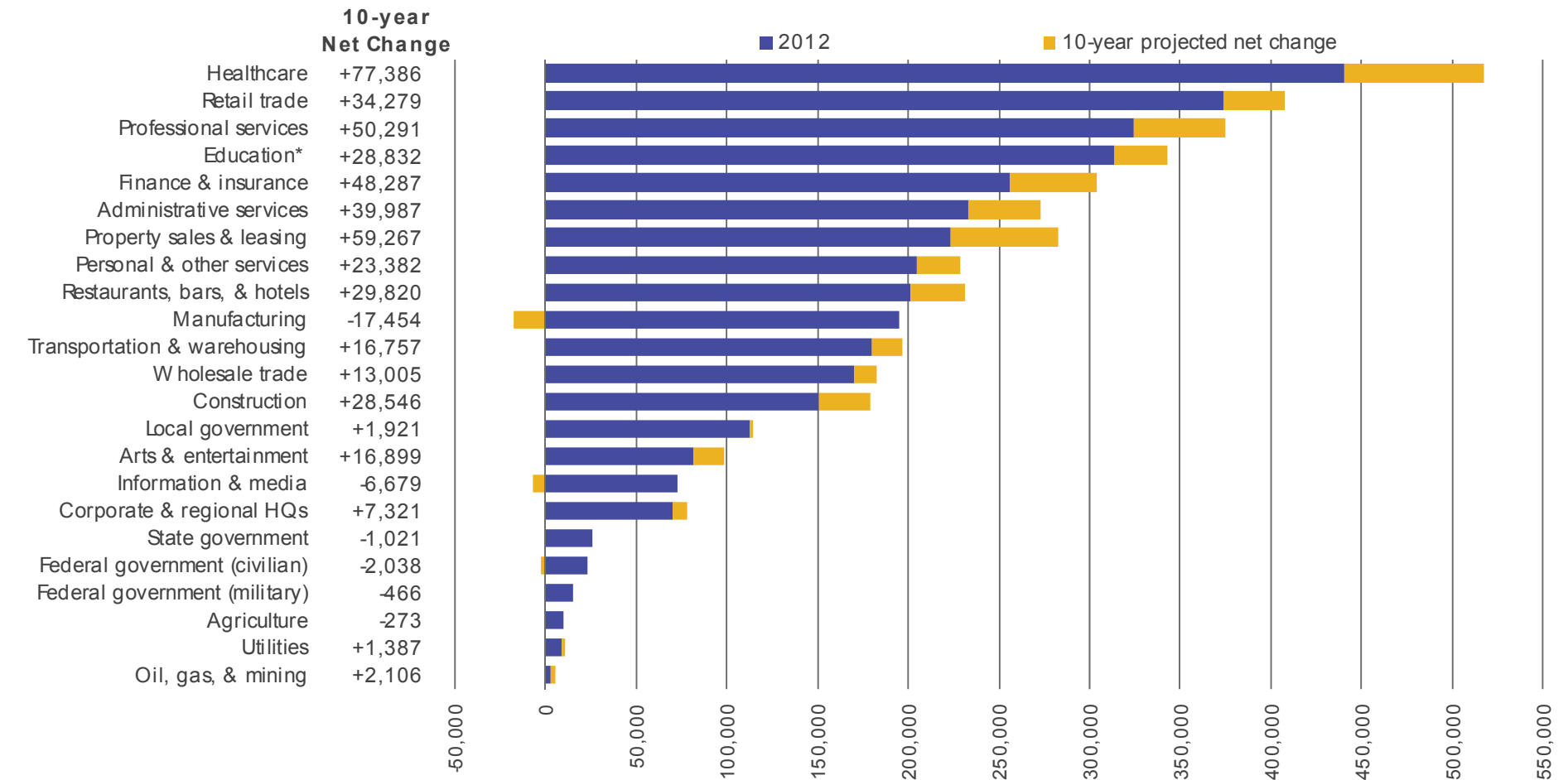
*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

Source: EMSI Complete Employment-2013.4

FIGURE 15: NJTPA JOB BASE IN 2012 + PROJECTED 10-YEAR CHANGE

EMSIs projections indicate little change in job growth patterns in the years ahead. The same industries that are growing now are expected to continue growing.

Activities such as manufacturing and government are not expected to gain jobs, at least not in significant numbers. For manufacturing, the explanation is probably structural. The manufacturing sector is expected to grow in output and productivity in the US, but technological advances in production processes will accommodate this expansion with little upward impact on employment.



*NOTE: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

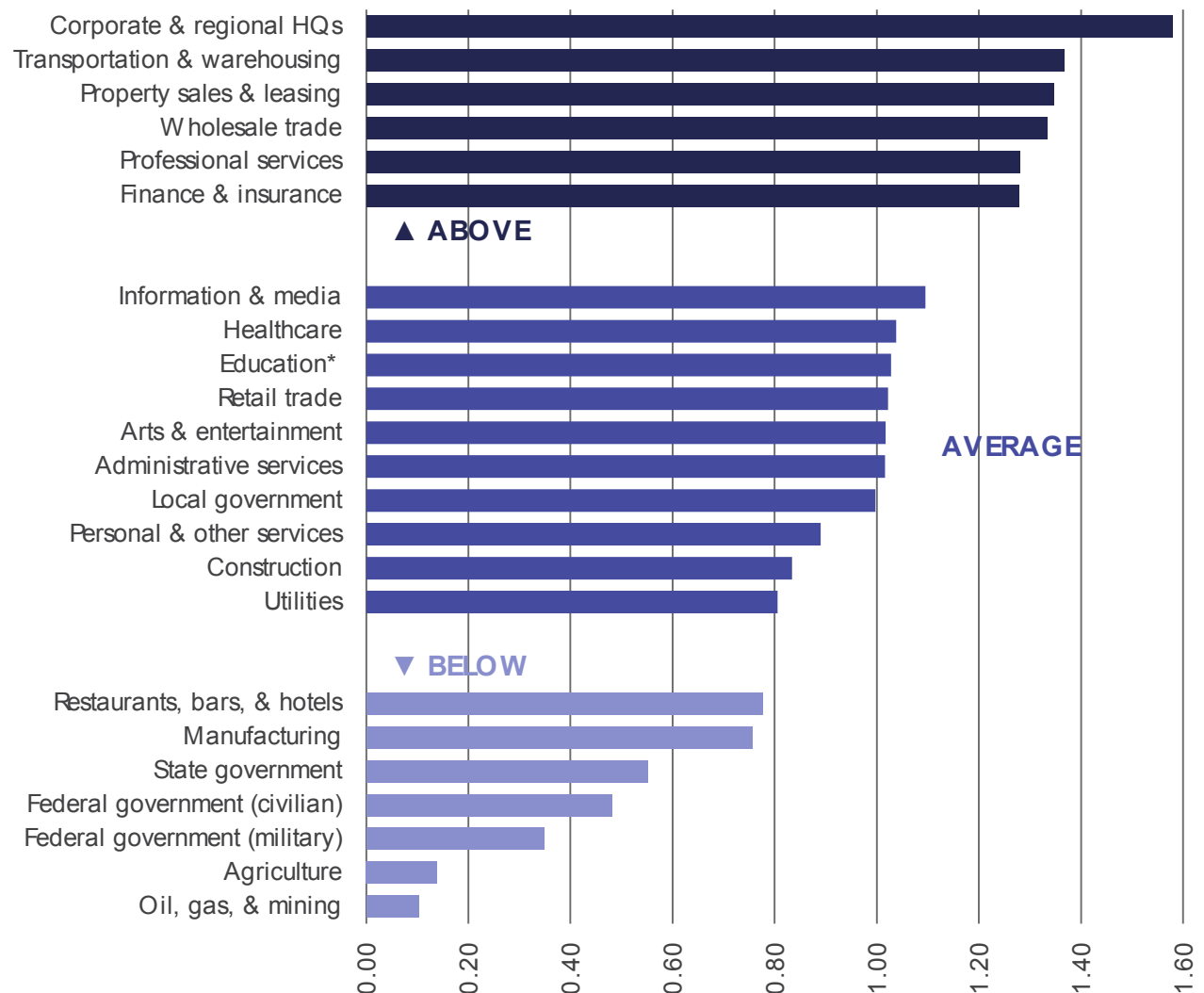
Source: EMSI Complete Employment–2013.4

FIGURE 16: NJTPA INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US
LOCATION QUOTIENT ANALYSIS

With a location quotient (LQ) exceeding 1.50, the corporate headquarter sector employs a high concentration of jobs in the region relative to the rest of the US. Despite its high LQ, this sector employs only 80,000 jobs in aggregate, so it is relatively small in terms of absolute employment within the region. However, a strong corporate HQs base yields other tangible and intangible benefits such as high wages and heightened visibility.

Other sectors registering high LQs in North Jersey include those that involve the movement of goods and people (transportation, warehousing, wholesale trade) and office-related employment (professional services, finance, and insurance).

US average for each industry = 1.00
regional strength > 1.20
regional weakness < 0.80



*NOTE: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

Source: EMSI Complete Employment–2013.4

FIGURE 17: INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US

LOCATION QUOTIENTS FOR THE 13-COUNTY NJTPA REGION AT THE 6-DIGIT NAICS LEVEL

Figure 17 presents location quotients (LQs) for the region for those industries recording an extremely high LQ of 2.50 or greater. Location quotients (LQs) indicate strengths and weaknesses in the employment base relative to the US overall. Theoretically, higher LQs imply specialization in a regional economy and are often viewed by economists as export industries. The table also provides information regarding total jobs, average earnings, the age and gender composition of the workers, and projected net job change for the 2012-2022 timeframe. In addition, the table identifies if an industry falls within one of the State of New Jersey's seven Regional Innovation Clusters. A table containing location quotients for every 6-digit industries is provided in Appendix A.

STATE CLUSTERS

AM	Advanced Manufacturing
FIN	Finance
HC	Healthcare
LS	Life Sciences
TCH	Technology
ILD	Transportation, Logistics, and Distribution
A&D	Aero & Defense
TOU	Tourism

LOCATION QUOTIENT DESCRIPTIONS

extremely high (> 2.50)
above average (between 1.20 and 2.50)
average (between 0.80 and 1.20)
below average (<0.80)

NAICS CLASSIFICATION					LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION		CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Manufacturing	325411	Medicinal & Botanical Mfg.	LS	10.77	4,415	\$275,451	18%	22%	48%	+699
Wholesale trade	423410	Photographic Equip. & Supplies Merch. Whslers.	TLD	7.77	2,328	\$110,262	22%	21%	35%	+232
Manufacturing	325620	Toilet Preparation Mfg.	AM	5.90	6,483	\$109,258	21%	26%	45%	+191
Information & media	519110	News Syndicates		4.95	1,599	\$114,444	31%	10%	34%	+640
Trans. & whsing.	485210	Interurban & Rural Bus Trans.		4.55	1,897	\$48,380	15%	37%	31%	+565
Manufacturing	311942	Spice & Extract Mfg.		4.54	2,054	\$105,161	25%	26%	37%	+617
Fin. & Ins.	524130	Reinsurance Carriers	FIN	4.24	2,422	\$196,187	19%	23%	55%	-67
Fin. & Ins.	523130	Commodity Contracts Dealing	FIN	4.23	2,077	\$261,983	24%	18%	28%	+849
Manufacturing	325199	All Other Basic Organic Chemical Mfg.	AM	4.08	2,883	\$141,124	17%	28%	28%	+177
Manufacturing	325412	Pharmaceutical Preparation Mfg.	LS	4.08	17,276	\$193,406	18%	21%	50%	-4,555
Manufacturing	322291	Sanitary Paper Product Mfg.	AM	3.87	2,358	\$181,613	26%	22%	46%	+174
Wholesale trade	424920	Book, Periodical, & Newspaper Merch. Whslers.	TLD	3.85	4,950	\$63,492	24%	26%	46%	-201
Admin. Svcs.	561910	Packaging & Labeling Svcs.		3.79	5,035	\$41,038	27%	28%	49%	-1,459
Trans. & whsing.	488320	Marine Cargo Handling	TLD	3.71	3,527	\$150,025	20%	23%	10%	+231
Wholesale trade	424320	Male Clothing & Furnishings Merch. Whslers.	TLD	3.52	2,397	\$48,936	26%	25%	48%	-280
Manufacturing	323121	Tradebinding & Related Work	AM	3.15	1,101	\$67,371	17%	28%	34%	-413
Trans. & whsing.	485320	Limousine Service		2.93	9,540	\$31,420	14%	35%	13%	+1,170

NAICS CLASSIFICATION				LEVEL IN 2012			WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION		CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Manufacturing	339113	Surgical Appliance & Supplies Mfg.	AM	2.83	5,864	\$169,051	26%	20%	41%	-502
Wholesale trade	423220	Home Furnishing Merch. Whlsers.	TLD	2.81	3,573	\$66,397	21%	27%	42%	-190
Manufacturing	339911	Jewelry (except Costume) Mfg.		2.80	1,647	\$105,601	26%	23%	46%	+406
Wholesale trade	424210	Drugs & Druggists' Sundries Merch. Whlsers.	TLD	2.80	11,019	\$173,931	22%	18%	49%	+3,299
Manufacturing	325120	Ind. Gas Mfg.	AM	2.79	1,083	\$172,340	20%	26%	29%	+132
Wholesale trade	423460	Ophthalmic Goods Merch. Whlsers.	TLD	2.77	1,102	\$77,672	22%	21%	38%	-12
Fin. & Ins.	523110	Investment Banking & Securities Dealing	FIN	2.74	12,313	\$178,286	23%	19%	30%	-3,263
Wholesale trade	423620	Elect. & Elect. Appliance Merch. Whlsers.	TLD	2.74	1,539	\$78,931	25%	23%	32%	-357
Manufacturing	334419	Other Elect. Component Mfg.	AM	2.71	3,523	\$79,795	21%	27%	34%	+1,986
Manufacturing	325413	In-Vitro Diagnostic Substance Mfg.	LS	2.69	1,074	\$144,433	19%	20%	53%	+25
Per. & other svcs.	999999	Unclassified Industry		2.68	9,819	\$36,790	37%	17%	51%	-6,834
Wholesale trade	424610	Plastics Materials & Basic Forms & Shapes Merch. Whlsers.	TLD	2.68	1,176	\$97,069	21%	28%	34%	-275
Retail trade	447190	Other Gasoline Stations		2.66	6,076	\$27,340	32%	24%	28%	+702
Wholesale trade	424330	Female & Infants Clothing & Access. Merch. Whlsers.	TLD	2.64	4,362	\$65,837	24%	26%	47%	-1,237
Wholesale trade	424310	Piece Goods, Notions, & Other Dry Goods Merch. Whlsers.	TLD	2.64	1,614	\$64,284	24%	25%	46%	+37

FIGURE 18: INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US

HOW THE LQS OF THE REGION'S STRONGEST INDUSTRIES ARE DISTRIBUTED ACROSS THE 13 COUNTIES

Figure 18 provides employment figures for each of the 13 counties within the industries that recorded extremely high regional LQs. For example, as of 2012, 5,524 workers were employed in the pharmaceutical manufacturing in Morris County and 5,514 people were employed in investment banking and securities dealing in Hudson County.

NAICS CLASSIFICATION			EMPLOYMENT LEVEL IN 2012														
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	Cluster	US	NJTPA	Bergen	Essex	Hudson	Hunterdon	Middlesex	Monmouth	Morris	Ocean	Passaic	Somerset	Sussex	Union	Warren
Manufacturing	325411 Medicinal & Botanical Manufacturing	LS	19,901	4,415	305	515	<10	<10	302	<10	<10	<10	<10	221	0	2,981	71
Whlsl. trade	423410 Photographic Equip. & Supplies Merch. Whslers.	TLD	14,549	2,328	480	798	31	<10	554	<10	309	<10	61	<10	0	55	17
Manufacturing	325620 Toilet Preparation Manufacturing	AM	53,307	6,483	948	353	60	<10	2,109	367	865	145	401	218	0	1,006	<10
Info. & media	519110 News Syndicates		15,696	1,599	32	78	308	<10	143	<10	<10	<10	13	959	<10	44	0
Trans. & whsing.	485210 Interurban & Rural Bus Transportation		20,240	1,897	139	250	721	<10	81	<10	152	192	261	<10	0	92	0
Manufacturing	311942 Spice & Extract Manufacturing		21,975	2,054	678	25	356	37	649	<10	81	23	<10	119	0	81	<10
Fin. & Ins.	524130 Reinsurance Carriers	FN	27,723	2,422	197	29	356	399	855	<10	484	<10	<10	88	0	<10	0
Fin. & Ins.	523130 Commodity Contracts Dealing	FN	23,817	2,077	164	106	1,130	17	148	70	60	32	31	293	0	13	12
Manufacturing	325199 All Other Basic Organic Chemical Manufacturing	AM	34,304	2,883	221	353	<10	<10	1,258	<10	236	46	119	55	<10	588	0
Manufacturing	325412 Pharmaceutical Preparation Manufacturing	LS	205,590	17,276	876	524	50	52	4,033	872	5,524	161	908	3,278	<10	895	102
Manufacturing	322291 Sanitary Paper Product Manufacturing	AM	29,553	2,358	528	0	0	39	60	0	0	0	0	1,731	0	0	0
Whlsl. trade	424920 Book, Periodical, & Newspaper Merch. Whslers.	TLD	62,484	4,950	1,553	163	952	22	1,389	24	166	42	38	497	29	66	<10
Admin. svcs.	561910 Packaging & Labeling Services		64,430	5,035	710	334	214	46	1,878	82	516	38	704	148	86	276	<10
Trans. & whsing.	488320 Marine Cargo Handling	TLD	46,192	3,527	<10	1,047	558	0	28	<10	<10	0	0	0	0	1,884	0
Whlsl. trade	424320 Male Clothing & Furnishings Merch. Whslers.	TLD	33,043	2,397	317	253	722	<10	711	36	39	15	69	193	<10	31	<10
Manufacturing	323121 Tradebinding & Related Work	AM	16,944	1,101	576	15	56	<10	35	<10	10	<10	384	<10	<10	14	0
Trans. & whsing.	485320 Limousine Service		158,350	9,540	1,838	941	2,075	80	1,374	654	547	130	626	163	51	1,015	46
Manufacturing	339113 Surgical Appliance & Supplies Manufacturing	AM	100,520	5,864	2,279	37	13	11	331	464	553	18	546	1,520	<10	65	24
Whlsl. trade	423220 Home Furnishing Merch. Whslers.	TLD	61,758	3,573	1,164	233	200	<10	775	460	156	150	178	105	<10	125	16
Manufacturing	339911 Jewelry (except Costume) Manufacturing		28,520	1,647	84	55	77	<10	65	38	1,005	23	23	<10	<10	252	<10
Whlsl. trade	424210 Drugs & Druggists' Sundries Merch. Whslers.	TLD	191,155	11,019	2,025	501	197	297	1,838	233	3,091	22	166	1,650	0	988	11
Manufacturing	325120 Industrial Gas Manufacturing	AM	18,862	1,083	10	34	<10	0	23	<10	78	0	0	192	0	701	36
Whlsl. trade	423460 Ophthalmic Goods Merch. Whslers.	TLD	19,325	1,102	327	20	32	<10	28	<10	411	0	50	224	0	<10	0
Fin. & Ins.	523110 Investment Banking & Securities Dealing	FN	218,098	12,313	1,124	798	5,514	79	933	705	1,935	278	190	442	65	248	<10
Whlsl. trade	423620 Electrical & Electronic Appliance Merch. Whslers.	TLD	27,265	1,539	346	194	31	<10	591	31	79	<10	108	<10	<10	142	<10
Manufacturing	334419 Other Electronic Component Manufacturing	AM	63,027	3,523	1,629	181	53	26	380	86	747	83	150	128	<10	35	24
Manufacturing	325413 In-Vitro Diagnostic Substance Manufacturing	LS	19,382	1,074	<10	<10	0	<10	<10	72	193	0	<10	787	<10	<10	<10
Per. & other svcs.	999999 Unclassified Industry		177,634	9,819	2,833	207	1,539	59	2,046	226	54	1,331	912	346	145	117	<10
Whlsl. trade	424610 Plastics Materials & Related Merch. Whslers.	TLD	21,335	1,176	285	325	32	<10	149	65	134	<10	100	12	<10	57	0
Retail trade	447190 Other Gasoline Stations		110,922	6,076	1,026	657	484	315	729	430	664	339	310	293	123	531	177
Whlsl. trade	424330 Female & Infant Clothing & Acc. Merch. Whslers.	TLD	80,276	4,362	1,050	384	877	<10	983	198	305	65	178	84	<10	223	<10
Whlsl. trade	424310 Piece Goods & Other Dry Goods Merch. Whslers.	TLD	29,711	1,614	249	119	237	17	151	121	117	21	255	273	<10	47	<10

Darker shading in county cells conveys high absolute employment in a given industry.

Source: EMSI Complete Employment–2013.4

FIGURE 19: EXPECTED CORRELATIONS BETWEEN SELECTED HIGH LQ LOCAL INDUSTRIES & HIGHLY UTILIZED OCCUPATIONS
SELECTED OCCUPATIONS SORTED BY MEDIAN LOCAL HOURLY WAGE RATE, PLUS SOCIO-ECONOMIC CHARACTERISTICS

The table on the following two pages crosswalks industries registering high regional location quotients with occupations that are highly utilized by those industries. The occupations are listed vertically along rows. The industries—grouped within four of the state’s regional innovation clusters—are listed in columns. Each occupation includes regional data on employment, location quotient, wages, age, gender, and the educational attainment normally required. The occupations are ranked in order of the 2012 median hourly wage.

The shaded crosswalk section indicates the percentage of employment each occupation typically accounts for in each of the industries. For example, the occupation with the highest regional median wage (\$68.53)—General & Operations Managers—normally accounts for 1%-5% of jobs within each of the industries. Sales representatives, both technical and non-technical, often account for larger percentages of employment within the transportation, logistics, and distribution sectors.

OCCUPATION (ROW) TYPICALLY ACCOUNTS FOR:

- >10% of jobs in this industry (column)
- 5-10% of industry's jobs
- 1-5% of industry's jobs
- <1% of industry's jobs
- few if any of industry's jobs

SELECTED US INDUSTRIES ►

▼ SELECTED OCCUPATIONS IN THE NORTH JERSEY REG.										2012 Jbs	2012-2022 Net Chg	2012 LQ	2012 Median Hourly Wage	Under Age 35 (%)	Age 55 or Older (%)	Female (%)	EDUCATIONAL ATTAINMENT	Trans., Logistics, & Distribution	Life Sci.	Fin. Serv.	Advanced Mfg.*				
11-1021	General & Operations Managers	34,216	+1,290	0.81	\$68.53	17%	24%	26%	Bachelor's or higher, plus exp.																
11-2022	Sales Managers	12,451	+1,140	1.39	\$62.29	21%	21%	37%	Bachelor's or higher, plus exp.																
11-3031	Financial Managers	22,899	+3,021	1.52	\$59.30	16%	25%	40%	Bachelor's or higher, plus exp.																
11-3051	Industrial Production Managers	3,909	-99	1.10	\$53.14	11%	27%	17%	Bachelor's or higher, plus exp.																
41-4011	Sales Reps., Tech. & Sci. Products	9,882	+1,392	1.13	\$47.77	22%	24%	29%	Bachelor's degree																
15-1132	Software Developers, Applications	23,261	+3,438	1.77	\$46.42	32%	12%	22%	Bachelor's degree																
15-1121	Computer Systems Analysts	15,463	+2,336	1.29	\$43.21	25%	19%	30%	Bachelor's degree																
17-2112	Industrial Engineers	2,616	+159	0.57	\$40.34	17%	29%	21%	Bachelor's degree																
19-2031	Chemists	4,650	-558	2.62	\$37.39	23%	21%	38%	Bachelor's degree																
13-1031	Claims Adjusters, Examiners, & Investigators	6,827	+39	1.10	\$35.54	20%	24%	51%	Long-term OJT																
13-2011	Accountants & Auditors	38,475	+5,663	1.16	\$35.10	20%	29%	48%	Bachelor's degree																
13-2052	Personal Financial Advisors	43,188	+20,459	1.45	\$34.66	12%	35%	15%	Bachelor's degree																
13-1199	Business Operations Specialists, All Other	34,652	+898	1.69	\$33.12	25%	24%	57%	Long-term OJT																
13-1161	Market Research Analysts & Marketing Specialists	13,717	+3,948	1.29	\$33.01	30%	19%	52%	Bachelor's degree																
41-3031	Financial & Related Svcs. Sales Agents	37,404	+10,834	1.54	\$32.42	18%	25%	15%	Bachelor's degree																
41-4012	Sales Reps., Except Tech. & Sci. Products	37,531	+2,920	1.09	\$31.46	19%	31%	25%	Moderate-term OJT																
51-1011	Sups. of Production & Operating Workers	12,040	-759	0.96	\$30.83	15%	28%	22%	Related work exp.																
43-1011	Sups. of Office & Admin. Support Workers	34,216	+1,955	1.13	\$28.68	21%	24%	64%	Related work exp.																
43-6011	Executive Secretaries & Exec. Admin. Assts.	14,780	+1,722	0.79	\$28.34	22%	30%	92%	Related work exp.																
41-1012	Sups. of Non-Retail Sales Workers	19,719	+3,089	1.18	\$28.29	12%	34%	20%	Related work exp.																
51-8091	Chemical Plant & System Operators	728	-76	0.92	\$26.22	16%	27%	11%	Long-term OJT																
49-9041	Industrial Machinery Mechanics	5,657	+731	0.77	\$25.43	16%	29%	5%	Long-term OJT																
15-1151	Computer User Support Specialists	13,564	+1,816	1.04	\$25.09	32%	16%	34%	Associate's degree																
43-5061	Production, Planning, & Expediting Clerks	4,854	+270	0.78	\$23.64	24%	24%	52%	Moderate-term OJT																
43-4011	Brokerage Clerks	3,674	-441	2.91	\$23.62	30%	11%	57%	Moderate-term OJT																

OCCUPATION (ROW) TYPICALLY ACCOUNTS FOR:

- >10% of jobs in this industry (column)
- 5-10% of industry's jobs
- 1-5% of industry's jobs
- <1% of industry's jobs
- few if any of industry's jobs

									SELECTED US INDUSTRIES ►																			
													4232	4234	4236	4242	4243	4246	4883	3254	3391	5231	5241	3222	3231	3251	3256	3344
													Trans., Logistics, & Distribution						Life Sci.		Fin. Serv.			Advanced Mfg.*				
▼ SELECTED OCCUPATIONS IN THE NORTH JERSEY REG.									2012 Jobs	2012-2022 Net Chg	2012 LQ	2012 Median Hourly Wage	Under Age 35 (%)	Age 55 or Older (%)	Female (%)	EDUCATIONAL ATTAINMENT												
51-9011	Chemical Equip. Workers	2,373	-604	2.05	\$20.72	16%	27%	13%	Moderate-term OJT																			
43-9041	Insurance Claims & Policy Processing Clerks	4,925	+73	1.02	\$20.25	26%	22%	79%	Moderate-term OJT																			
51-9081	Dental Laboratory Technicians	845	+20	0.96	\$20.13	21%	25%	36%	Moderate-term OJT																			
43-3031	Bookkeeping, Accounting, & Auditing Clerks	41,942	+4,850	1.01	\$20.11	18%	33%	86%	Moderate-term OJT																			
51-5112	Printing Press Operators	4,671	-683	1.15	\$19.64	16%	24%	18%	Moderate-term OJT																			
49-9071	Maintenance & Repair Workers, General	25,581	+2,126	0.87	\$19.30	18%	29%	11%	Moderate-term OJT																			
53-3032	Heavy & Tractor-Trailer Truck Drivers	40,670	+5,389	0.90	\$19.08	17%	26%	5%	Short-term OJT																			
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	8,490	+349	0.81	\$18.37	20%	31%	45%	Moderate-term OJT																			
43-6014	Sects. & Admin. Assts., Exc. Legal, Med., & Exec.	51,216	+1,868	0.94	\$18.19	23%	31%	90%	Short-term OJT																			
43-4151	Order Clerks	5,775	+129	1.26	\$17.11	32%	23%	62%	Short-term OJT																			
43-4051	Customer Service Reps.	47,641	+3,438	0.96	\$16.96	37%	18%	67%	Short-term OJT																			
51-9023	Mixing & Blending Machine Workers	3,134	-414	1.28	\$16.95	22%	21%	14%	Moderate-term OJT																			
51-2022	Electrical & Electronic Equip. Assemblers	4,337	-44	1.07	\$16.94	21%	30%	55%	Short-term OJT																			
53-3033	Light Truck or Delivery Services Drivers	17,973	+1,681	0.97	\$16.22	21%	25%	6%	Short-term OJT																			
51-5113	Print Binding & Finishing Workers	1,024	-189	0.94	\$15.23	15%	30%	46%	Short-term OJT																			
53-7051	Industrial Truck & Tractor Operators	10,262	+500	0.97	\$14.85	32%	18%	9%	Short-term OJT																			
43-5071	Shipping, Receiving, & Traffic Clerks	18,499	-704	1.27	\$14.67	31%	20%	31%	Short-term OJT																			
43-9061	Office Clerks, General	67,892	+6,678	1.01	\$14.56	30%	28%	78%	Short-term OJT																			
51-9196	Paper Goods Machine Workers	2,626	-678	1.34	\$14.46	18%	27%	38%	Moderate-term OJT																			
51-2092	Team Assemblers	6,074	+1,117	0.28	\$13.24	30%	24%	47%	Moderate-term OJT																			
53-7062	Laborers & Freight, Stock, & Material Workers	58,962	+5,566	1.23	\$12.24	38%	18%	20%	Short-term OJT																			
43-5081	Stock Clerks & Order Fillers	46,620	+165	1.22	\$10.72	43%	20%	38%	Short-term OJT																			
51-9111	Packaging & Filling Machine Workers	11,708	-494	1.53	\$10.58	29%	21%	63%	Moderate-term OJT																			
51-9198	Helpers-Production Workers	8,889	+179	1.02	\$10.35	41%	19%	26%	Short-term OJT																			
53-7064	Packers & Packagers, Hand	23,092	+523	1.60	\$9.62	34%	22%	62%	Short-term OJT																			

*Note: "Advanced" manufacturing implies high productivity through the use of advanced processes, regardless of the product manufactured.

Source: EMSI Complete Employment - 2013.4

INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US (CONTINUED FROM FIGURE 17)

LOCATION QUOTIENTS FOR THE 13-COUNTY NJTPA REGION AT THE 6-DIGIT NAICS LEVEL

STATE CLUSTERS

AM	Advanced Manufacturing
FIN	Finance
HC	Healthcare
LS	Life Sciences
TCH	Technology
TLD	Transportation, Logistics, and Distribution
A&D	Aero & Defense
TOU	Tourism

LOCATION QUOTIENT DESCRIPTIONS

extremely high (> 2.50)
above average (between 1.20 and 2.50)
average (between 0.80 and 1.20)
below average (<0.80)

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Manufacturing	325411 Medicinal & Botanical Mfg.	LS	10.77	4,415	\$275,451	18%	22%	48%	+699
Wholesale trade	423410 Photographic Equip. & Supplies Merch. Whslers.	TLD	7.77	2,328	\$110,262	22%	21%	35%	+232
Manufacturing	325620 Toilet Preparation Mfg.	AM	5.90	6,483	\$109,258	21%	26%	45%	+191
Information & media	519110 News Syndicates		4.95	1,599	\$114,444	31%	10%	34%	+640
Trans. & whsing.	485210 Interurban & Rural Bus Trans.		4.55	1,897	\$48,380	15%	37%	31%	+565
Manufacturing	311942 Spice & Extract Mfg.		4.54	2,054	\$105,161	25%	26%	37%	+617
Fin. & Ins.	524130 Reinsurance Carriers	FIN	4.24	2,422	\$196,187	19%	23%	55%	-67
Fin. & Ins.	523130 Commodity Contracts Dealing	FIN	4.23	2,077	\$261,983	24%	18%	28%	+849
Manufacturing	325199 All Other Basic Organic Chemical Mfg.	AM	4.08	2,883	\$141,124	17%	28%	28%	+177
Manufacturing	325412 Pharmaceutical Preparation Mfg.	LS	4.08	17,276	\$193,406	18%	21%	50%	-4,555
Manufacturing	322291 Sanitary Paper Product Mfg.	AM	3.87	2,358	\$181,613	26%	22%	46%	+174
Wholesale trade	424920 Book, Periodical, & Newspaper Merch. Whslers.	TLD	3.85	4,950	\$63,492	24%	26%	46%	-201
Admin. Svcs.	561910 Packaging & Labeling Svcs.		3.79	5,035	\$41,038	27%	28%	49%	-1,459
Trans. & whsing.	488320 Marine Cargo Handling	TLD	3.71	3,527	\$150,025	20%	23%	10%	+231
Wholesale trade	424320 Male Clothing & Furnishings Merch. Whslers.	TLD	3.52	2,397	\$48,936	26%	25%	48%	-280
Manufacturing	323121 Tradebinding & Related Work	AM	3.15	1,101	\$67,371	17%	28%	34%	-413
Trans. & whsing.	485320 Limousine Service		2.93	9,540	\$31,420	14%	35%	13%	+1,170
Manufacturing	339113 Surgical Appliance & Supplies Mfg.	AM	2.83	5,864	\$169,051	26%	20%	41%	-502
Wholesale trade	423220 Home Furnishing Merch. Whslers.	TLD	2.81	3,573	\$66,397	21%	27%	42%	-190
Manufacturing	339911 Jewelry (except Costume) Mfg.		2.80	1,647	\$105,601	26%	23%	46%	+406
Wholesale trade	424210 Drugs & Druggists' Sundries Merch. Whslers.	TLD	2.80	11,019	\$173,931	22%	18%	49%	+3,299
Manufacturing	325120 Ind. Gas Mfg.	AM	2.79	1,083	\$172,340	20%	26%	29%	+132
Wholesale trade	423460 Ophthalmic Goods Merch. Whslers.	TLD	2.77	1,102	\$77,672	22%	21%	38%	-12
Fin. & Ins.	523110 Investment Banking & Securities Dealing	FIN	2.74	12,313	\$178,286	23%	19%	30%	-3,263
Wholesale trade	423620 Elect. & Elect. Appliance Merch. Whslers.	TLD	2.74	1,539	\$78,931	25%	23%	32%	-357
Manufacturing	334419 Other Elect. Component Mfg.	AM	2.71	3,523	\$79,795	21%	27%	34%	+1,986

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Manufacturing	325413 In-Vitro Diagnostic Substance Mfg.	LS	2.69	1,074	\$144,433	19%	20%	53%	+25
Per. & other svcs.	999999 Unclassified Industry		2.68	9,819	\$36,790	37%	17%	51%	-6,834
Wholesale trade	424610 Plastics Materials & Basic Forms & Shapes Merch. Whslers.	TLD	2.68	1,176	\$97,069	21%	28%	34%	-275
Retail trade	447190 Other Gasoline Stations		2.66	6,076	\$27,340	32%	24%	28%	+702
Wholesale trade	424330 Female & Infants Clothing & Access. Merch. Whslers.	TLD	2.64	4,362	\$65,837	24%	26%	47%	-1,237
Wholesale trade	424310 Piece Goods, Notions, & Other Dry Goods Merch. Whslers.	TLD	2.64	1,614	\$64,284	24%	25%	46%	+37
Manufacturing	332321 Metal Window & Door Mfg.		2.46	2,576	\$50,314	18%	32%	26%	-369
Wholesale trade	424430 Dairy Product (except Dried or Canned) Merch. Whslers.		2.46	2,198	\$66,222	24%	25%	26%	+149
Manufacturing	335122 Commercial, Ind., & Institutional Electric Lighting Fixture Mfg.		2.45	1,046	\$102,512	17%	30%	31%	+274
Wholesale trade	423420 Office Equip. Merch. Whslers.		2.41	4,867	\$141,900	22%	20%	36%	-371
Healthcare	621511 Medical Laboratories		2.40	8,941	\$82,958	28%	21%	65%	+1,453
Fin. & Ins.	523140 Commodity Contracts Brokerage		2.33	1,862	\$85,446	18%	24%	21%	-216
Manufacturing	311330 Confectionery Mfg. from Purchased Chocolate		2.31	1,560	\$123,874	31%	14%	44%	-400
Prof. Svcs.	541711 R&D in Biotechnology		2.29	7,100	\$175,091	21%	21%	48%	+1,142
Healthcare	621391 Offices of Podiatrists		2.27	1,902	\$56,077	31%	25%	75%	+213
Trans. & whsing.	485410 School & Employee Bus Trans.		2.27	8,833	\$22,311	15%	40%	60%	+311
Fin. & Ins.	525110 Pension Funds		2.26	4,876	\$51,751	11%	31%	16%	+2,415
Trans. & whsing.	493120 Refrigerated Warehousing & Storage		2.26	2,650	\$78,317	26%	25%	33%	+859
Prof. Svcs.	541910 Marketing Research & Public Opinion Polling		2.25	6,935	\$110,131	28%	23%	40%	-1,239
Prof. Svcs.	541618 Other Mgmt. Consulting Svcs.		2.25	6,411	\$68,914	23%	29%	45%	+2,554
Retail trade	454311 Heating Oil Dealers		2.21	1,817	\$70,263	22%	27%	27%	-220
Trans. & whsing.	485510 Charter Bus Industry		2.21	1,519	\$43,086	12%	39%	32%	-244
Manufacturing	311999 All Other Miscellaneous Food Mfg.		2.19	1,313	\$60,460	24%	24%	35%	-456
Manufacturing	325611 Soap & Other Detergent Mfg.		2.18	1,158	\$85,265	22%	25%	43%	-1,144
Wholesale trade	423940 Jewelry, Precious Stone, & Related Merch. Whslers.		2.16	3,573	\$72,193	25%	26%	42%	+1,342
Fin. & Ins.	524298 All Other Insurance Related Activities		2.16	4,756	\$105,397	17%	30%	45%	+1,054
Fin. & Ins.	524113 Direct Life Insurance Carriers		2.14	12,797	\$170,148	21%	19%	57%	+807
Retail trade	445310 Beer, Wine, & Liquor Stores		2.13	7,116	\$27,989	41%	19%	33%	+283
Prof. Svcs.	541612 Human Resources Consulting Svcs.		2.13	5,279	\$123,601	28%	23%	44%	-466
Retail trade	445120 Convenience Stores		2.12	7,655	\$25,194	38%	21%	47%	+1,427
Manufacturing	325612 Polish & Other Sanitation Good Mfg.		2.10	1,074	\$184,708	24%	22%	42%	-127
Wholesale trade	423990 Other Miscellaneous Durable Goods Merch. Whslers.		2.10	6,117	\$62,179	24%	27%	38%	+1,986
Fin. & Ins.	523120 Securities Brokerage		2.03	19,017	\$159,083	21%	22%	26%	+4,254
Retail trade	451212 News Dealers & Newsstands		2.02	1,001	\$43,298	37%	21%	40%	+66
Wholesale trade	424130 Ind. & Personal Service Paper Merch. Whslers.		2.02	2,499	\$84,711	20%	33%	36%	+236
Manufacturing	325414 Biological Product (except Diagnostic) Mfg.		1.97	1,102	\$101,407	19%	20%	39%	+808
Retail trade	448130 Children's & Infants' Clothing Stores		1.97	3,557	\$20,344	61%	13%	78%	+669
Utilities	221310 Water Supply & Irrigation Sys.s		1.96	1,914	\$116,575	20%	25%	28%	+570
Fin. & Ins.	525120 Health & Welfare Funds		1.96	3,215	\$98,179	11%	32%	16%	+510

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Trans. & whsing.	488510 Freight Trans. Arrangement		1.96	9,385	\$85,265	26%	21%	39%	+1,460
Trans. & whsing.	484110 General Freight Trucking, Local		1.94	17,375	\$45,481	18%	25%	13%	+916
Corporate & reg. HQs	551112 Offices of Other Holding Companies		1.90	2,896	\$223,389	24%	21%	46%	-1
Manufacturing	323115 Digital Printing		1.90	1,145	\$67,161	16%	29%	31%	+355
Per. & other svcs.	812310 Coin-Operated Laundries & Drycleaners		1.88	1,825	\$26,012	18%	36%	47%	-99
Wholesale trade	423690 Other Elect. Parts & Equip. Merch. Whslers.		1.87	5,892	\$120,228	23%	22%	33%	-1,637
Manufacturing	326111 Plastics Bag & Pouch Mfg.		1.87	1,146	\$44,672	19%	32%	36%	+436
Wholesale trade	423850 Service Est. Equip. & Supplies Merch. Whslers.		1.84	2,115	\$64,511	20%	29%	28%	+385
Wholesale trade	424820 Wine & Distilled Alcoholic Beverage Merch. Whslers.		1.82	2,943	\$98,881	29%	23%	20%	+949
Trans. & whsing.	481111 Scheduled Passenger Air Trans.		1.82	15,494	\$91,635	21%	19%	43%	+342
Manufacturing	332618 Other Fabricated Wire Product Mfg.		1.81	1,036	\$70,777	19%	33%	28%	-371
Education*	611691 Exam Preparation & Tutoring (Private)		1.80	6,785	\$16,709	38%	23%	75%	+3,398
Manufacturing	323119 Other Commercial Printing		1.80	1,600	\$70,561	17%	27%	31%	-107
Information & media	517110 Wired Telecommunications Carriers		1.78	25,190	\$136,938	22%	19%	31%	-5,128
Fin. & Ins.	522120 Savings Institutions		1.78	6,556	\$66,361	37%	19%	72%	+488
Information & media	511130 Book Publishers		1.77	3,228	\$98,580	23%	26%	47%	-154
Fin. & Ins.	523930 Investment Advice		1.75	42,702	\$62,854	14%	30%	19%	+21,355
Prof. Svcs.	541860 Direct Mail Advertising		1.74	2,394	\$63,579	27%	23%	51%	-703
Prof. Svcs.	541211 Offices of Certified Public Accountants		1.73	16,483	\$107,310	28%	22%	56%	+1,728
Wholesale trade	424470 Meat & Meat Product Merch. Whslers.		1.72	1,388	\$90,493	25%	22%	26%	+291
Manufacturing	311821 Cookie & Cracker Mfg.		1.72	1,179	\$72,038	33%	27%	44%	-433
Restrntrts, bars, & hotels	722320 Caterers		1.72	9,755	\$23,314	28%	22%	63%	+3,763
Prop. sales & leasing	531110 Lessors of Residential Buildings & Dwellings		1.71	57,395	\$23,653	8%	45%	51%	+18,761
Prop. sales & leasing	531120 Lessors of Nonres. Buildings (except Miniwarehouses)		1.71	30,844	\$53,382	8%	46%	53%	+10,242
Wholesale trade	424420 Packaged Frozen Food Merch. Whslers.		1.70	1,082	\$69,472	24%	23%	26%	+169
Manufacturing	311811 Retail Bakeries		1.70	2,960	\$24,654	41%	23%	50%	+748
Retail trade	448120 Women's Clothing Stores		1.70	10,782	\$23,371	62%	13%	78%	+3,764
Education*	611692 Automobile Driving Schools (Private)		1.70	1,779	\$10,594	28%	28%	69%	+896
Wholesale trade	424490 Other Grocery & Related Products Merch. Whslers.		1.69	8,001	\$73,469	26%	21%	27%	+501
Retail trade	445291 Baked Goods Stores		1.68	1,426	\$20,825	26%	29%	42%	+195
Trans. & whsing.	493190 Other Warehousing & Storage		1.68	2,330	\$69,328	21%	26%	30%	+261
Education*	611610 Fine Arts Schools (Private)		1.67	8,011	\$9,765	32%	26%	72%	+3,482
Wholesale trade	424990 Other Miscellaneous Nondurable Goods Merch. Whslers.		1.67	4,762	\$53,544	17%	36%	42%	+540
Healthcare	621512 Diagnostic Imaging Centers		1.65	2,734	\$78,426	26%	21%	66%	-138
Education*	611630 Language Schools (Private)		1.64	1,071	\$13,162	39%	21%	85%	+277
Prof. Svcs.	541214 Payroll Svcs.		1.63	5,852	\$132,430	31%	19%	56%	+833
Prof. Svcs.	541712 Physical, Engineering, & Life Sci. R&D (except Biotech.)		1.63	15,703	\$170,209	20%	23%	46%	+1,283
Wholesale trade	423440 Other Commercial Equip. Merch. Whslers.		1.63	1,679	\$92,115	22%	21%	35%	+392
Prof. Svcs.	541512 Computer Sys.s Design Svcs.		1.60	30,783	\$112,431	30%	16%	32%	+11,765

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Arts & entertainment	713940 Fitness & Recreational Sports Centers		1.58	21,573	\$18,160	46%	15%	54%	+3,981
Trans. & whsing.	485999 All Other Transit & Ground Passenger Trans.		1.58	1,352	\$38,289	24%	27%	36%	+502
Prop. sales & leasing	532299 All Other Consumer Goods Rental		1.58	2,357	\$38,956	35%	17%	31%	+1,670
Manufacturing	325510 Paint & Coating Mfg.		1.57	1,313	\$117,402	15%	32%	28%	-525
Prof. Svcs.	541614 Process, Physical Distribution, & Logistics Consulting Svcs.		1.57	4,530	\$61,478	25%	27%	46%	+1,122
Corporate & reg. HQs	551114 Corporate, Subsidiary, & Regional Managing Offices		1.56	66,847	\$168,810	25%	20%	51%	+7,082
Wholesale trade	424120 Stationery & Office Supplies Merch. Whslers.		1.56	1,788	\$60,832	18%	35%	43%	-317
Retail trade	448150 Clothing Access. Stores		1.56	2,795	\$68,148	53%	17%	75%	+1,595
Fin. & Ins.	525990 Other Financial Vehicles		1.55	2,019	\$63,280	12%	31%	14%	-433
Healthcare	621340 Offices of Physical, Occup. & Speech & Related Therapists		1.55	12,843	\$51,038	27%	31%	73%	+4,409
Trans. & whsing.	492110 Couriers & Express Delivery Svcs.		1.55	19,965	\$48,085	29%	15%	18%	+2,551
Restrntrts, bars, & hotels	722310 Food Service Contractors		1.53	19,873	\$23,950	27%	23%	65%	+5,933
Admin. Svcs.	561311 Employment Placement Agencies		1.53	7,965	\$40,325	39%	19%	51%	-458
Education*	611420 Computer Training (Private)		1.53	1,224	\$32,354	11%	16%	63%	-74
Healthcare	621112 Offices of Physicians, Mental Health Specialists		1.53	3,275	\$85,643	13%	38%	51%	+467
Per. & other svcs.	813920 Prof. Orgs.		1.52	2,672	\$75,584	23%	28%	53%	+442
Prop. sales & leasing	531312 Nonresidential Property Managers		1.52	8,391	\$52,370	14%	39%	53%	+3,142
Trans. & whsing.	485310 Taxi Service		1.51	3,504	\$15,980	13%	36%	11%	+825
Wholesale trade	423710 Hardware Merch. Whslers.		1.51	2,336	\$72,240	21%	30%	31%	+679
Wholesale trade	424690 Other Chemical & Allied Products Merch. Whslers.		1.50	3,341	\$104,834	21%	30%	34%	-22
Education*	611620 Sports & Recreation Instruction (Private)		1.50	8,609	\$12,954	32%	27%	71%	+4,154
Healthcare	621493 Freestanding Ambulatory Surgical & Emergency Centers		1.50	3,355	\$68,228	28%	23%	79%	+1,136
Retail trade	445230 Fruit & Vegetable Markets		1.50	1,651	\$29,546	37%	23%	46%	-218
Manufacturing	332116 Metal Stamping		1.49	1,584	\$68,947	19%	35%	30%	+137
Retail trade	446130 Optical Goods Stores		1.49	2,167	\$43,205	48%	15%	65%	+102
Manufacturing	335931 Current-Carrying Wiring Device Mfg.		1.48	1,018	\$94,194	16%	35%	28%	+92
Fin. & Ins.	523999 Miscellaneous Financial Investment Activities		1.48	2,342	\$67,749	18%	26%	28%	+861
Prof. Svcs.	541511 Custom Computer Programming Svcs.		1.47	27,626	\$101,842	29%	16%	30%	+6,352
Manufacturing	334510 Electromedical & Electrotherapeutic Apparatus Mfg.		1.46	1,760	\$103,879	21%	27%	42%	+11
Trans. & whsing.	493110 General Warehousing & Storage		1.46	19,012	\$50,327	25%	25%	35%	+1,069
Restrntrts, bars, & hotels	722213 Snack & Nonalcoholic Beverage Bars		1.46	15,865	\$19,670	55%	13%	51%	+3,700
Wholesale trade	423840 Ind. Supplies Merch. Whslers.		1.45	2,531	\$80,773	19%	29%	26%	+9
Fin. & Ins.	523920 Portfolio Mgmt.		1.45	26,846	\$90,927	14%	30%	18%	+9,539
Retail trade	443120 Computer & Software Stores		1.45	3,364	\$63,607	35%	22%	23%	-851
Wholesale trade	423210 Furniture Merch. Whslers.		1.45	1,472	\$66,473	20%	27%	40%	+348
Information & media	511140 Directory & Mailing List Publishers		1.43	1,075	\$107,781	21%	23%	50%	-447
Trans. & whsing.	484122 Gen. Freight Trucking, Long-Distance, Less Than Truckload		1.41	8,049	\$53,526	19%	24%	14%	+3,144
Wholesale trade	424410 General Line Grocery Merch. Whslers.		1.41	6,723	\$94,326	27%	21%	28%	+564
Admin. Svcs.	562111 Solid Waste Collection		1.41	3,970	\$63,950	24%	21%	18%	+596

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22	
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION		CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Arts & entertainment	713930	Marinas		1.41	1,568	\$30,950	33%	17%	53%	+246
Admin. Svcs.	561510	Travel Agencies		1.40	3,692	\$46,478	18%	33%	69%	-1,002
Prof. Svcs.	541519	Other Computer Related Svcs.		1.40	4,256	\$133,907	28%	17%	31%	-815
Retail trade	446191	Food (Health) Supplement Stores		1.39	1,965	\$31,337	38%	15%	62%	-206
Healthcare	621310	Offices of Chiropractors		1.39	4,657	\$57,196	29%	21%	66%	+453
Wholesale trade	423610	Elect. Apparatus & Related Equip. Merch. Whslers.		1.39	4,287	\$89,693	24%	23%	32%	+817
Retail trade	445299	All Other Specialty Food Stores		1.38	2,849	\$30,547	33%	26%	44%	-217
Arts & entertainment	711410	Agents & Managers for Artists, Athletes, & Other Public Figures		1.38	2,171	\$86,612	29%	22%	43%	+454
Admin. Svcs.	561499	All Other Business Support Svcs.		1.38	4,000	\$58,893	24%	23%	60%	+1,640
Retail trade	442299	All Other Home Furnishings Stores		1.37	4,683	\$24,793	35%	22%	57%	-67
Prof. Svcs.	541380	Testing Laboratories		1.37	4,632	\$97,871	26%	25%	30%	-796
Retail trade	452111	Department Stores (except Discount Department Stores)		1.36	15,301	\$31,370	44%	22%	68%	-4,109
Retail trade	448140	Family Clothing Stores		1.36	13,387	\$24,441	63%	13%	79%	+2,792
Prof. Svcs.	541613	Marketing Consulting Svcs.		1.36	10,030	\$58,899	20%	33%	45%	+4,719
Per. & other svcs.	812332	Ind. Launderers		1.35	1,484	\$48,468	27%	26%	44%	+171
Retail trade	445210	Meat Markets		1.35	1,489	\$28,620	38%	22%	45%	+99
Retail trade	451120	Hobby, Toy, & Game Stores		1.33	5,014	\$19,660	56%	15%	40%	-796
Healthcare	621330	Offices of Mental Health Practitioners (except Physicians)		1.33	5,955	\$54,555	13%	49%	70%	+1,353
Prop. sales & leasing	531210	Offices of Real Estate Agents & Brokers		1.33	50,073	\$18,149	10%	44%	54%	+4,724
Trans. & whsing.	901149	US Postal Service		1.33	16,699	\$79,187	17%	24%	35%	-5,103
Prof. Svcs.	541990	All Other Prof., Scientific, & Technical Svcs.		1.32	29,642	\$37,615	13%	36%	35%	+2,097
Retail trade	452112	Discount Department Stores		1.32	26,366	\$24,668	45%	22%	66%	+5,261
Trans. & whsing.	482110	Rail Trans.		1.32	6,482	\$99,859	16%	29%	17%	+4,168
Utilities	221210	Natural Gas Distribution		1.32	3,050	\$144,622	17%	19%	21%	+154
Prof. Svcs.	541620	Environmental Consulting Svcs.		1.31	3,580	\$70,583	24%	28%	45%	+859
Retail trade	448190	Other Clothing Stores		1.31	4,048	\$30,864	56%	16%	76%	+318
Education*	611110	Elementary & Secondary Schools (Private)		1.31	27,796	\$40,895	30%	27%	82%	+5,672
Education*	903612	Colleges, Universities, & Prof. Schools (Local Govt.)		1.30	19,498	\$30,137	24%	33%	57%	-111
Manufacturing	323114	Quick Printing		1.30	1,660	\$61,411	17%	28%	30%	-580
Wholesale trade	423430	Comp. & Comp. Peripheral Equip. & Software Merch. Whslers.		1.30	6,150	\$134,933	24%	20%	35%	+547
Retail trade	448210	Shoe Stores		1.30	5,176	\$26,477	71%	9%	64%	+800
Prof. Svcs.	541410	Interior Design Svcs.		1.29	3,649	\$27,864	17%	28%	55%	+339
Information & media	511120	Periodical Publishers		1.29	4,050	\$81,739	17%	31%	52%	+463
Prof. Svcs.	541513	Computer Facilities Mgmt. Svcs.		1.28	1,853	\$124,162	27%	16%	31%	+159
Manufacturing	323113	Commercial Screen Printing		1.28	2,067	\$44,223	19%	28%	33%	+412
Prop. sales & leasing	531390	Other Activities Related to Real Estate		1.28	30,451	\$11,910	7%	47%	54%	+6,805
Admin. Svcs.	561431	Private Mail Centers		1.28	1,055	\$24,866	29%	20%	53%	-81
Prop. sales & leasing	531130	Lessors of Miniwarehouses & Self-Storage Units		1.27	13,087	\$24,482	7%	46%	54%	+7,336
Healthcare	621910	Ambulance Svcs.		1.26	4,617	\$39,489	42%	15%	45%	+1,472

NAICS CLASSIFICATION				LEVEL IN 2012			WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION		CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Retail trade	453210	Office Supplies & Stationery Stores		1.26	4,035	\$41,916	49%	16%	51%	+1,026
Trans. & whsing.	488119	Other Airport Operations		1.26	1,700	\$39,520	42%	16%	28%	+556
Healthcare	621210	Offices of Dentists		1.26	23,590	\$62,378	28%	22%	85%	+3,424
Per. & other svcs.	812320	Drycleaning & Laundry Svcs. (except Coin-Operated)		1.25	4,143	\$25,854	20%	34%	47%	-871
Prof. Svcs.	541430	Graphic Design Svcs.		1.25	5,389	\$38,486	19%	27%	52%	-25
Prof. Svcs.	541110	Offices of Lawyers		1.25	35,840	\$95,711	22%	31%	55%	+1,689
Healthcare	623311	Continuing Care Retirement Communities		1.24	10,994	\$38,208	31%	24%	78%	+3,682
Retail trade	446110	Pharmacies & Drug Stores		1.23	18,040	\$40,243	54%	16%	62%	+1,906
Per. & other svcs.	813410	Civic & Social Orgs.		1.23	10,642	\$21,316	47%	18%	69%	+2,285
Fin. & Ins.	524291	Claims Adjusting		1.22	3,652	\$72,255	14%	34%	41%	+431
Retail trade	445110	Supermarkets & Other Grocery (except Convenience) Stores		1.22	60,237	\$32,175	42%	20%	48%	+6,519
Admin. Svcs.	561612	Security Guards & Patrol Svcs.		1.22	16,793	\$29,672	39%	22%	25%	+1,141
Manufacturing	311812	Commercial Bakeries		1.21	3,323	\$46,528	31%	27%	40%	+216
Prof. Svcs.	541213	Tax Preparation Svcs.		1.21	5,632	\$26,984	13%	39%	41%	+1,191
Trans. & whsing.	492210	Local Messengers & Local Delivery		1.21	3,700	\$22,455	19%	23%	15%	-249
Information & media	511110	Newspaper Publishers		1.21	6,375	\$70,426	21%	28%	44%	-3,168
Admin. Svcs.	561312	Executive Search Svcs.		1.19	1,143	\$96,589	35%	21%	56%	+164
Retail trade	446120	Cosmetics, Beauty Supplies, & Perfume Stores		1.19	4,839	\$27,448	39%	15%	61%	+522
Retail trade	448310	Jewelry Stores		1.19	4,081	\$43,655	24%	30%	58%	+402
Prop. sales & leasing	532111	Passenger Car Rental		1.19	3,258	\$77,331	29%	26%	32%	+23
Admin. Svcs.	562910	Remediation Svcs.		1.18	1,929	\$80,745	26%	20%	21%	+93
Construction	238340	Tile & Terrazzo Contractors		1.18	2,486	\$33,189	19%	21%	12%	+654
Retail trade	443112	Radio, Television, & Other Elect.s Stores		1.18	8,058	\$61,209	36%	22%	24%	+1,482
Retail trade	451140	Musical Inst. & Supplies Stores		1.18	1,047	\$37,203	45%	17%	28%	+21
Retail trade	448110	Men's Clothing Stores		1.18	1,336	\$36,124	58%	14%	77%	-838
Prof. Svcs.	541850	Display Advertising		1.18	1,186	\$61,029	26%	23%	49%	+596
Manufacturing	323110	Commercial Lithographic Printing		1.17	4,653	\$67,531	18%	28%	32%	-1,098
Construction	238140	Masonry Contractors		1.17	4,941	\$43,279	22%	22%	15%	+2,691
Trans. & whsing.	488410	Motor Vehicle Towing		1.16	1,868	\$40,380	29%	18%	16%	+571
Healthcare	624410	Child Day Care Svcs.		1.16	41,467	\$22,197	35%	20%	95%	+8,949
Wholesale trade	423930	Recyclable Material Merch. Whslers.		1.16	3,411	\$60,851	27%	26%	25%	+1,108
Construction	238350	Finish Carpentry Contractors		1.15	7,530	\$32,617	20%	21%	12%	+399
Per. & other svcs.	812111	Barber Shops		1.15	3,978	\$19,492	38%	17%	91%	+2,255
Prof. Svcs.	541810	Advertising Agencies		1.15	6,162	\$80,658	26%	23%	52%	+1,067
Retail trade	443111	Household Appliance Stores		1.14	1,538	\$46,857	26%	31%	22%	-198
Admin. Svcs.	561320	Temporary Help Svcs.		1.14	58,571	\$30,987	39%	19%	52%	+20,594
Fin. & Ins.	523910	Miscellaneous Intermediation		1.14	7,898	\$73,489	13%	30%	19%	+3,973
Prof. Svcs.	541611	Administrative Mgmt. & General Mgmt. Consulting Svcs.		1.14	19,170	\$73,596	19%	34%	42%	+7,424
Prof. Svcs.	541219	Other Accounting Svcs.		1.14	12,714	\$43,562	15%	36%	44%	+1,663

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Fin. & Ins.	523991 Trust, Fiduciary, & Custody Activities		1.13	2,471	\$49,808	14%	29%	20%	+623
Trans. & whsing.	485991 Special Needs Trans.		1.13	1,826	\$33,952	29%	25%	36%	+262
Information & media	512131 Motion Picture Theaters (except Drive-Ins)		1.13	2,955	\$16,535	60%	12%	33%	+464
Admin. Svcs.	561990 All Other Support Svcs.		1.13	7,025	\$94,177	15%	32%	44%	+2,717
Per. & other svcs.	811212 Computer & Office Machine Repair & Maint.		1.13	1,519	\$55,044	24%	25%	22%	-131
Construction	238330 Flooring Contractors		1.12	3,899	\$34,216	20%	21%	12%	+911
Education*	903611 Elementary & Secondary Schools (Local Govt.)		1.12	161,942	\$77,210	22%	28%	76%	+1,646
Healthcare	621111 Offices of Physicians (except Mental Health Specialists)		1.12	58,808	\$107,005	25%	28%	75%	+9,102
Per. & other svcs.	812199 Other Personal Care Svcs.		1.12	6,483	\$22,377	34%	15%	88%	+2,775
Education*	611699 All Other Miscellaneous Schools & Instruction (Private)		1.12	2,807	\$29,442	37%	23%	76%	+1,310
Retail trade	454111 Elect. Shopping		1.12	5,483	\$46,836	42%	16%	58%	+3,758
Wholesale trade	423450 Medical, Dental, & Hospital Equip. & Supplies Merch. Whslers.		1.11	4,452	\$109,680	24%	20%	35%	+681
Healthcare	621399 Offices of All Other Miscellaneous Health Practitioners		1.11	7,252	\$51,184	14%	48%	70%	+1,681
Information & media	518210 Data Processing, Hosting, & Related Svcs.		1.11	7,503	\$103,012	17%	25%	39%	+71
Retail trade	453910 Pet & Pet Supplies Stores		1.11	2,926	\$27,816	46%	20%	61%	+1,409
Retail trade	441110 New Car Dealers		1.11	21,910	\$72,937	37%	20%	22%	+2,791
Admin. Svcs.	561210 Facilities Support Svcs.		1.11	3,799	\$52,038	21%	30%	39%	+1,742
Wholesale trade	423320 Brick, Stone, & Related Construction Material Merch. Whslers.		1.10	1,099	\$65,185	24%	23%	24%	+475
Wholesale trade	423120 Motor Vehicle Supplies & New Parts Merch. Whslers.		1.10	3,900	\$60,211	24%	28%	22%	+259
Trans. & whsing.	484210 Used Household & Office Goods Moving		1.09	2,181	\$49,278	22%	23%	15%	+3
Healthcare	623110 Nursing Care Facilities		1.09	37,585	\$43,690	27%	24%	80%	+5,526
Manufacturing	339112 Surgical & Medical Inst. Mfg.		1.09	2,729	\$135,297	21%	26%	43%	+315
Per. & other svcs.	813311 Human Rights Orgs.		1.08	1,137	\$32,600	36%	21%	62%	+304
Fin. & Ins.	522110 Commercial Banking		1.08	29,924	\$94,922	35%	18%	59%	+3,822
Healthcare	624221 Temporary Shelters		1.08	1,422	\$39,056	29%	26%	76%	+140
Prop. sales & leasing	531320 Offices of Real Estate Appraisers		1.08	2,877	\$29,152	11%	42%	51%	-41
Construction	236118 Residential Remodelers		1.08	13,144	\$39,730	21%	21%	16%	+5,676
Arts & entertainment	711320 Promoters of Perf. Arts, Sports, & Similar Events w/o Facilities		1.07	1,622	\$43,027	20%	27%	41%	+249
Healthcare	621610 Home Health Care Svcs.		1.07	35,584	\$29,345	17%	32%	94%	+14,478
Per. & other svcs.	812990 All Other Personal Svcs.		1.07	27,968	\$22,917	23%	15%	64%	+6,354
Per. & other svcs.	811121 Auto. Body, Paint, & Interior Repair & Maint.		1.06	6,308	\$50,088	29%	22%	16%	+283
Healthcare	622110 General Medical & Surgical Hospitals (Private)		1.06	96,352	\$72,780	25%	25%	76%	+639
Wholesale trade	423110 Automobile & Other Motor Vehicle Merch. Whslers.		1.05	2,530	\$103,328	24%	26%	22%	+656
Wholesale trade	423730 HVAC Equip. & Supplies Merch. Whslers.		1.05	1,274	\$93,105	21%	30%	26%	+258
Admin. Svcs.	561621 Security Sys.s Svcs. (except Locksmiths)		1.05	3,283	\$70,466	31%	26%	20%	+125
Per. & other svcs.	811412 Appliance Repair & Maint.		1.05	1,304	\$37,305	18%	39%	29%	+14
Healthcare	621420 Outpatient Mental Health & Substance Abuse Centers		1.04	4,278	\$46,875	29%	23%	79%	+603
Per. & other svcs.	812910 Pet Care (except Veterinary) Svcs.		1.04	3,143	\$21,582	37%	15%	56%	+695
Fin. & Ins.	524292 Third Party Administration of Insurance & Pension Funds		1.04	4,320	\$83,818	19%	29%	54%	+234

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Retail trade	444190 Other Building Material Dealers		1.04	4,774	\$61,293	32%	25%	29%	-842
Arts & entertainment	713990 All Other Amusement & Recreation Industries		1.03	5,146	\$19,690	39%	17%	53%	+1,445
Admin. Svcs.	561110 Office Administrative Svcs.		1.03	16,109	\$68,414	19%	34%	47%	+3,869
Fin. & Ins.	524210 Insurance Agencies & Brokerages		1.02	26,772	\$91,515	17%	31%	51%	+2,407
Per. & other svcs.	812930 Parking Lots & Garages		1.02	2,647	\$24,721	40%	18%	38%	+39
Manufacturing	332322 Sheet Metal Work Mfg.		1.02	2,105	\$70,040	22%	28%	24%	+692
Construction	238210 Elect. Contractors & Other Wiring Installation Contractors		1.02	19,572	\$70,161	27%	18%	14%	+3,803
Arts & entertainment	711510 Independent Artists, Writers, & Performers		1.02	23,652	\$19,566	17%	28%	41%	+4,060
Per. & other svcs.	813990 Other Similar Orgs. (except Bus., Prof., Labor, & Political Orgs.)		1.01	2,545	\$40,067	23%	32%	51%	-302
Fin. & Ins.	522320 Fin.I Trans.Processing, Reserve, & Clearinghouse Activities		1.01	2,772	\$92,377	21%	24%	38%	+151
Per. & other svcs.	812112 Beauty Salons		1.01	24,455	\$21,728	37%	18%	88%	+7,369
Arts & entertainment	711310 Promoters of Perf. Arts, Sports, & Similar Events w/ Facilities		1.00	2,048	\$33,449	35%	20%	50%	+1,088
Healthcare	622310 Specialty (except Psy. & Substance Abuse) Hospitals (Private)		1.00	4,564	\$67,782	29%	20%	80%	+792
Prof. Svcs.	541191 Title Abstract & Settlement Offices		1.00	1,497	\$55,763	18%	34%	54%	-97
Local Govt.	903999 Local Govt., Excluding Education & Hospitals		1.00	112,885	\$75,876	25%	25%	42%	+1,921
Wholesale trade	423720 Plumbing & Heating Equip. & Supp. (Hydronics) Merch. Whlsers.		0.99	1,683	\$75,197	23%	27%	29%	-256
Healthcare	621999 All Other Miscellaneous Ambulatory Health Care Svcs.		0.99	1,452	\$67,310	28%	23%	45%	-232
Per. & other svcs.	812210 Funeral Homes & Funeral Svcs.		0.99	2,365	\$57,795	14%	48%	29%	+28
Healthcare	621991 Blood & Organ Banks		0.99	1,545	\$79,779	39%	17%	45%	+65
Construction	236117 New Housing Operative Builders		0.99	1,544	\$83,892	21%	21%	18%	-674
Healthcare	624190 Other Individual & Family Svcs.		0.99	9,922	\$36,395	24%	30%	81%	+3,251
Fin. & Ins.	522220 Sales Financing		0.98	1,849	\$126,653	22%	22%	45%	-772
Healthcare	623220 Residential Mental Health & Substance Abuse Facilities		0.98	4,243	\$42,674	32%	23%	70%	+1,191
Prof. Svcs.	541310 Architectural Svcs.		0.97	4,399	\$68,077	18%	32%	25%	+861
Fin. & Ins.	522292 Real Estate Credit		0.96	4,970	\$104,606	24%	22%	48%	+231
Construction	238220 Plumbing, Heating, & Air-Conditioning Contractors		0.96	20,621	\$66,765	28%	18%	14%	+4,088
Prof. Svcs.	541890 Other Svcs. Related to Advertising		0.96	2,176	\$56,646	23%	25%	49%	+289
Per. & other svcs.	811192 Car Washes		0.96	3,785	\$22,728	28%	24%	23%	+709
Healthcare	621320 Offices of Optometrists		0.96	2,639	\$53,984	36%	21%	69%	+489
Healthcare	621498 All Other Outpatient Care Centers		0.96	2,384	\$70,684	27%	22%	74%	+752
Manufacturing	315212 Women's, Girls', & Infants' Cut & Sew Apparel Contractors		0.96	1,080	\$32,183	19%	33%	69%	-652
Retail trade	453110 Florists		0.96	2,582	\$26,659	21%	28%	66%	+229
Arts & entertainment	711219 Other Spectator Sports		0.96	3,726	\$10,890	17%	28%	41%	+1,557
Retail trade	444110 Home Centers		0.96	12,815	\$38,030	35%	24%	31%	+3,439
Admin. Svcs.	561410 Document Preparation Svcs.		0.95	3,215	\$22,074	15%	28%	70%	+695
Per. & other svcs.	811111 General Auto. Repair		0.95	9,230	\$44,884	26%	24%	15%	+1,218
Prof. Svcs.	541370 Surveying & Mapping (except Geophysical) Svcs.		0.95	1,072	\$61,948	21%	29%	24%	+27
Healthcare	902622 Hospitals (State Govt.)		0.95	6,659	\$91,270	25%	21%	68%	-245
Per. & other svcs.	812113 Nail Salons		0.93	5,008	\$18,587	37%	15%	87%	+1,765

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Construction	237310 Highway, Street, & Bridge Construction		0.93	6,220	\$98,511	24%	20%	13%	+3,129
Retail trade	442110 Furniture Stores		0.93	4,383	\$46,929	31%	24%	43%	-332
Fin. & Ins.	524126 Direct Property & Casualty Insurance Carriers		0.93	9,309	\$124,248	20%	23%	56%	-654
Education*	611210 Junior Colleges (Private)		0.93	1,676	\$34,553	35%	27%	65%	+87
Per. & other svcs.	812331 Linen Supply		0.93	1,353	\$37,349	24%	29%	51%	-50
Per. & other svcs.	813930 Labor Unions & Similar Labor Orgs.		0.92	2,477	\$59,504	11%	36%	37%	+57
Construction	236115 New Single-Family Housing Const. (except Operative Builders)		0.92	8,676	\$54,110	25%	20%	21%	-234
Prof. Svcs.	541921 Photography Studios, Portrait		0.92	3,904	\$17,607	18%	33%	38%	+520
Wholesale trade	424450 Confectionery Merch. Whlsrs.		0.92	1,037	\$82,263	26%	21%	29%	+339
Prop. sales & leasing	532120 Truck, Utility Trailer, & RV Rental & Leasing		0.92	1,522	\$75,457	31%	27%	29%	+457
Admin. Svcs.	561720 Janitorial Svcs.		0.91	39,914	\$20,269	23%	23%	54%	+4,625
Prof. Svcs.	541330 Engineering Svcs.		0.91	19,036	\$104,369	24%	27%	28%	+3,078
Prof. Svcs.	541320 Landscape Architectural Svcs.		0.91	1,508	\$44,572	15%	33%	22%	-48
Prop. sales & leasing	532490 Other Commercial & Ind. Mach.& Equip. Rental & Leasing		0.90	2,135	\$47,712	27%	33%	25%	+1,367
Manufacturing	339950 Sign Mfg.		0.90	1,935	\$65,321	19%	34%	36%	-340
Fin. & Ins.	524114 Direct Health & Medical Insurance Carriers		0.90	6,892	\$110,590	21%	19%	61%	-173
Construction	238990 All Other Specialty Trade Contractors		0.90	10,978	\$38,282	20%	23%	12%	+2,107
Healthcare	623210 Residential Mental Retardation Facilities		0.90	7,736	\$34,580	34%	23%	76%	+3,141
Information & media	519130 Internet Publishing & Broadcasting & Web Search Portals		0.89	3,151	\$69,249	39%	13%	39%	+467
Admin. Svcs.	561492 Court Reporting & Stenotype Svcs.		0.89	1,609	\$51,588	17%	27%	65%	-308
Prof. Svcs.	541940 Veterinary Svcs.		0.89	6,090	\$49,645	40%	15%	57%	+297
Admin. Svcs.	561730 Landscaping Svcs.		0.88	22,436	\$35,078	36%	18%	21%	+7,668
Wholesale trade	423910 Sporting & Recreational Goods & Supplies Merch. Whlsrs.		0.88	1,166	\$51,358	26%	25%	40%	+294
Prop. sales & leasing	531311 Residential Property Managers		0.88	11,588	\$30,175	14%	39%	51%	+2,891
Healthcare	621492 Kidney Dialysis Centers		0.88	1,866	\$66,618	27%	23%	80%	+582
Retail trade	451110 Sporting Goods Stores		0.88	5,425	\$27,384	56%	15%	41%	+1,066
Admin. Svcs.	561790 Other Svcs. to Buildings & Dwellings		0.88	4,604	\$29,911	21%	22%	58%	+1,338
Fin. & Ins.	522310 Mortgage & Nonmortgage Loan Brokers		0.87	1,787	\$88,042	20%	27%	37%	-633
Retail trade	453220 Gift, Novelty, & Souvenir Stores		0.87	5,392	\$22,224	36%	30%	63%	+278
Retail trade	453998 All Other Miscellaneous Store Retailers (except Tobacco Stores)		0.87	6,086	\$33,212	21%	36%	48%	+547
Arts & entertainment	713910 Golf Courses & Country Clubs		0.87	6,818	\$35,183	49%	15%	53%	+1,136
Restrn'ts, bars, & hotels	722410 Drinking Places (Alcoholic Beverages)		0.87	7,593	\$21,765	43%	21%	47%	+372
Retail trade	442210 Floor Covering Stores		0.86	1,395	\$52,647	30%	24%	51%	-624
Retail trade	451211 Book Stores		0.86	1,903	\$24,154	47%	16%	38%	-1,304
Education*	611710 Educational Support Svcs. (Private)		0.86	4,117	\$35,685	32%	25%	73%	+1,988
Retail trade	444220 Nursery, Garden Center, & Farm Supply Stores		0.86	2,148	\$35,986	37%	22%	36%	+144
Arts & entertainment	711130 Musical Groups & Artists		0.86	1,547	\$24,691	22%	27%	46%	+528
Wholesale trade	423510 Metal Service Centers & Other Metal Merch. Whlsrs.		0.86	2,178	\$92,737	19%	32%	28%	-26
Construction	238320 Painting & Wall Covering Contractors		0.85	7,314	\$32,127	19%	21%	12%	+755

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Arts & entertainment	711211 Sports Teams & Clubs		0.84	1,851	\$272,340	43%	18%	36%	+618
Wholesale trade	423830 Ind. Mach.& Equip. Merch. Whslers.		0.84	5,390	\$90,564	20%	29%	27%	-414
Arts & entertainment	711110 Theater Companies & Dinner Theaters		0.83	1,563	\$27,426	35%	22%	51%	+314
Education*	902612 Colleges, Universities, & Prof. Schools (State Govt.)		0.83	42,258	\$63,784	31%	26%	54%	-87
Retail trade	453920 Art Dealers		0.83	1,108	\$27,491	13%	40%	46%	+204
Construction	238390 Other Building Finishing Contractors		0.83	1,888	\$37,562	21%	20%	13%	+613
Healthcare	624310 Vocational Rehabilitation Svcs.		0.83	6,130	\$30,948	34%	24%	63%	+1,077
Admin. Svcs.	561599 All Other Travel Arrangement & Reservation Svcs.		0.82	1,381	\$89,918	26%	25%	66%	+266
Construction	238170 Siding Contractors		0.82	1,057	\$32,762	19%	21%	10%	-189
Construction	238290 Other Building Equip. Contractors		0.82	2,514	\$81,796	27%	18%	13%	+288
Admin. Svcs.	561740 Carpet & Upholstery Cleaning Svcs.		0.82	1,545	\$35,945	22%	22%	54%	+157
Admin. Svcs.	561710 Exterminating & Pest Control Svcs.		0.81	1,915	\$52,829	26%	23%	50%	+479
Prop. sales & leasing	531190 Lessors of Other Real Estate Property		0.81	4,326	\$43,605	7%	46%	54%	+1,461
Arts & entertainment	713110 Amusement & Theme Parks		0.81	2,732	\$21,500	70%	13%	47%	+508
Prof. Svcs.	541820 Public Relations Agencies		0.80	1,666	\$70,298	20%	26%	49%	+514
Wholesale trade	425120 Wholesale Trade Agents & Brokers		0.80	14,706	\$95,313	19%	30%	33%	+1,410
Retail trade	441310 Auto. Parts & Access. Stores		0.79	6,012	\$36,620	36%	25%	16%	+423
Construction	238150 Glass & Glazing Contractors		0.79	1,102	\$62,080	21%	21%	15%	+739
Wholesale trade	424480 Fresh Fruit & Vegetable Merch. Whslers.		0.79	1,479	\$57,122	25%	23%	28%	+527
Education*	611519 Other Technical & Trade Schools (Private)		0.79	1,914	\$32,940	15%	20%	64%	+247
Manufacturing	322211 Corrugated & Solid Fiber Box Mfg.		0.79	1,464	\$90,862	14%	33%	26%	-383
Construction	237990 Other Heavy & Civil Engineering Construction		0.78	2,431	\$88,029	23%	21%	10%	+805
Admin. Svcs.	561920 Convention & Trade Show Organizers		0.78	1,288	\$67,337	18%	35%	44%	+9
Information & media	517911 Telecommunications Resellers		0.78	1,448	\$103,654	31%	15%	36%	+587
Per. & other svcs.	813110 Religious Orgs.		0.77	29,689	\$21,587	17%	41%	53%	+3,350
Per. & other svcs.	811490 Other Personal & Household Goods Repair & Maint.		0.77	4,757	\$19,368	7%	49%	27%	-279
Fin. & Ins.	522390 Other Activities Related to Credit Intermediation		0.77	2,185	\$53,929	20%	27%	36%	-559
Restrnrs, bars, & hotels	722110 Full-Service Restaurants		0.77	76,491	\$22,479	55%	13%	50%	+7,699
Trans. & whsing.	484230 Specialized Freight (except Used Goods) Trucking, Long-Distance		0.76	2,053	\$73,775	21%	23%	14%	+774
Retail trade	454390 Other Direct Selling Establishments		0.76	14,466	\$29,618	12%	26%	79%	-2,191
Admin. Svcs.	561439 Other Business Service Centers (including Copy Shops)		0.75	1,053	\$42,193	28%	21%	59%	+65
Manufacturing	324110 Petroleum Refineries		0.74	1,103	\$232,672	17%	32%	20%	+142
Healthcare	623990 Other Residential Care Facilities		0.74	2,577	\$36,267	35%	21%	73%	+170
Education*	611430 Prof. & Mgmt. Development Training (Private)		0.73	1,966	\$77,002	9%	15%	62%	+831
Wholesale trade	423810 Construction & Mining (except Oil Well) Mach.& Equip. Merch. Whslers.		0.72	1,210	\$90,001	21%	27%	24%	+153
Construction	238910 Site Preparation Contractors		0.72	9,157	\$43,346	19%	22%	12%	+886
Per. & other svcs.	813319 Other Social Advocacy Orgs.		0.72	1,480	\$42,758	36%	21%	69%	+764
Retail trade	452990 All Other General Merch&ise Stores		0.71	6,051	\$24,234	40%	17%	52%	+1,153
Per. & other svcs.	813910 Business Associations		0.71	1,975	\$80,658	21%	31%	51%	-322

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Wholesale trade	423310 Lumber, Plywood, Millwork, & Wood Panel Merch. Whslers.		0.71	1,341	\$65,714	24%	23%	24%	-814
Admin. Svcs.	561611 Investigation Svcs.		0.70	1,090	\$37,095	26%	29%	16%	-276
Information & media	515210 Cable & Other Subscription Programming		0.70	1,137	\$145,390	34%	11%	28%	-156
Construction	238130 Framing Contractors		0.70	1,404	\$46,258	21%	21%	13%	-671
Manufacturing	337110 Wood Kitchen Cabinet & Countertop Mfg.		0.69	1,587	\$47,174	26%	27%	30%	+1,392
Manufacturing	339999 All Other Miscellaneous Mfg.		0.68	1,003	\$54,559	19%	34%	38%	-407
Prof. Svcs.	541930 Translation & Interpretation Svcs.		0.68	1,186	\$18,452	13%	35%	36%	+240
Manufacturing	334511 Aeronautical, Nautical, & Related Sys. & Inst. Mfg.		0.68	1,876	\$119,660	19%	32%	26%	-857
Retail trade	454113 Mail-Order Houses		0.67	2,305	\$55,447	39%	18%	54%	-459
Healthcare	624110 Child & Youth Svcs.		0.65	2,924	\$34,261	25%	29%	81%	+329
Manufacturing	311612 Meat Processed from Carcasses		0.65	1,501	\$61,627	28%	28%	26%	+62
Restrnmts, bars, & hotels	722211 Limited-Service Restaurants		0.65	49,860	\$18,852	55%	13%	51%	+5,716
Arts & entertainment	713950 Bowling Centers		0.65	1,024	\$19,301	50%	19%	53%	-151
Retail trade	446199 All Other Health & Personal Care Stores		0.64	1,094	\$60,086	34%	15%	61%	-25
Admin. Svcs.	561440 Collection Agencies		0.64	1,984	\$60,185	36%	18%	54%	-341
Manufacturing	326199 All Other Plastics Product Mfg.		0.63	3,454	\$64,058	20%	30%	32%	-2,489
Information & media	511210 Software Publishers		0.63	4,127	\$121,246	33%	13%	31%	+907
Healthcare	624120 Svcs. for the Elderly & Persons with Disabilities		0.61	10,956	\$26,524	27%	26%	88%	+6,682
Retail trade	441120 Used Car Dealers		0.61	3,157	\$35,108	21%	27%	23%	+807
Per. & other svcs.	811310 Comm. & Ind. Mach.& Equip. (exc. Auto. & Elect.) Rep. & Maint.		0.61	3,158	\$77,342	18%	31%	16%	-106
Construction	236220 Commercial & Institutional Building Construction		0.61	7,659	\$87,373	23%	21%	17%	+636
Trans. & whsing.	488190 Other Support Activities for Air Trans.		0.59	1,292	\$62,833	35%	18%	23%	+151
Healthcare	622210 Psychiatric & Substance Abuse Hospitals (Private)		0.59	1,244	\$59,270	34%	24%	75%	+458
Trans. & whsing.	484220 Specialized Freight (except Used Goods) Trucking, Local		0.58	2,958	\$60,945	21%	24%	14%	-12
Construction	238310 Drywall & Insulation Contractors		0.58	3,799	\$52,048	21%	20%	14%	+397
Information & media	515120 Television Broadcasting		0.57	1,533	\$105,018	34%	14%	25%	+831
Restrnmts, bars, & hotels	721110 Hotels (except Casino Hotels) & Motels		0.57	18,071	\$40,345	35%	23%	53%	+2,288
Retail trade	444130 Hardware Stores		0.57	1,702	\$40,211	33%	27%	30%	-234
Utilities	221122 Electric Power Distribution		0.55	2,422	\$160,839	19%	22%	17%	+1,437
State Govt.	902999 State Govt., Excluding Education & Hospitals		0.55	25,897	\$91,968	23%	22%	48%	-1,021
Retail trade	453991 Tobacco Stores		0.55	1,539	\$16,268	14%	40%	46%	+805
Healthcare	623312 Homes for the Elderly		0.55	4,562	\$33,737	27%	26%	78%	+449
Admin. Svcs.	561422 Telemarketing Bureaus & Other Contact Centers		0.54	4,824	\$69,643	34%	18%	49%	-913
Construction	238160 Roofing Contractors		0.52	2,603	\$56,920	23%	21%	15%	-22
Admin. Svcs.	561330 Prof. Employer Orgs.		0.52	4,035	\$55,317	36%	19%	60%	-3,482
Retail trade	453310 Used Merchandise Stores		0.52	3,299	\$21,208	21%	35%	62%	+1,369
Education*	611310 Colleges, Universities, & Prof. Schools (Private)		0.51	19,398	\$44,811	34%	29%	59%	+4,444
Information & media	517210 Wireless Telecommunications Carriers (except Satellite)		0.51	1,789	\$98,313	53%	8%	36%	-1,057
Construction	237110 Water & Sewer Line & Related Structures Construction		0.50	1,777	\$87,120	26%	19%	11%	-233

NAICS CLASSIFICATION				LEVEL IN 2012		WORKFORCE COMPOSITION			CHANGE 2012-22
BROAD SECTOR	6-DIGIT CODE & DESCRIPTION	CLUSTER	LQ	Jobs	Avg. Earnings**	% <35	% >55	% Female	Net Job Gain (Loss)
Federal Govt. (civilian)	901199 Federal Govt., Civilian, Excluding Postal Service		0.48	23,143	\$128,175	26%	25%	39%	-2,038
Construction	238110 Poured Concrete Foundation & Structure Contractors		0.46	2,183	\$58,177	22%	21%	14%	+332
Prof. Svcs.	541690 Other Scientific & Technical Consulting Svcs.		0.46	3,164	\$70,544	18%	34%	43%	+605
Per. & other svcs.	814110 Private Households		0.45	17,533	\$21,910	32%	22%	91%	+3,070
Manufacturing	332710 Machine Shops		0.45	2,843	\$69,395	17%	36%	20%	+355
Retail trade	441320 Tire Dealers		0.45	1,773	\$49,985	33%	26%	16%	+74
Fin. & Ins.	522291 Consumer Lending		0.42	1,018	\$95,620	20%	22%	43%	-567
Construction	236210 Ind. Building Construction		0.42	1,436	\$93,033	25%	19%	16%	+324
Retail trade	447110 Gasoline Stations with Convenience Stores		0.40	6,386	\$23,449	38%	21%	35%	+2,806
Construction	237130 Power & Comm. Line & Related Structures Construction		0.40	1,342	\$96,846	29%	16%	11%	+491
Trans. & whsing.	484121 General Freight Trucking, Long-Distance, Truckload	4	0.40	6,568	\$51,411	18%	25%	12%	-593
Information & media	512110 Motion Picture & Video Production		0.38	1,992	\$53,041	39%	12%	30%	-185
Manufacturing	334413 Semiconductor & Related Device Mfg.		0.38	1,480	\$101,023	21%	26%	33%	-331
Federal Govt. (military)	901200 Federal Govt., Military		0.35	15,213	\$29,509	25%	26%	38%	-466
Fin. & Ins.	522130 Credit Unions		0.31	1,482	\$55,348	37%	19%	75%	-64
Retail trade	452910 Warehouse Clubs & Supercenters		0.24	6,137	\$41,863	45%	17%	50%	-2,053
Agriculture	111000 Crop Production		0.21	6,356	\$30,333	20%	38%	19%	-136
Oil, gas, & mining	211111 Crude Petroleum & Natural Gas Extraction		0.15	2,554	\$51,064	24%	20%	21%	+2,032
Agriculture	112000 Animal Production		0.04	1,065	\$25,733	29%	40%	33%	-164

SUPPORTING CEDS AND RELATED PLANS



SUPPORTING CEDS AND OTHER PLANS

The table below presents high priority strategies found in existing county CEDS and other state/regional economic development plans and reports.

HUNTERDON COUNTY CEDS (2014)

FOSTER PLANNED ECONOMIC DEVELOPMENT

- Create an **organizational structure** for the CEDS initiative whose function is to lead economic development and implement the CEDS.
- Work with local municipalities to identify funding opportunities, to encourage legislative activities and **to remove legislative barriers** to regionally significant projects.
- Advocate for **streamlining of state and local regulatory requirements**; reduce red tape associated with commercial development or redevelopment; support efforts that will reduce tax burden.
- Establish an **annual County Convention** for education of the County, municipalities and residents, implementing a structured approach to sharing of information, toolbox ordinances, etc.
- Direct Greater Raritan Workforce Investment Board (GRWIB) to **expand and promote its workforce development resources**.
- Support updating of **New Jersey Right to Farm legislation** to readdress allowable activities responding to today's economic environment.
- Promote expansion of **wineries and complementary farms and businesses**.
- Support the HC Chamber of Commerce as the State's Destination Marketing Organization to coordinate and market Hunterdon County through public/private partnerships and further support the **tourism industry**.

ESTABLISH THE COUNTY'S ROLE IN FACILITATING PUBLIC/PRIVATE PARTNERSHIPS TO ENHANCE ECONOMIC DEVELOPMENT.

- While no vital projects were developed under this goal, facilitating these partnerships will allow the County to creatively develop and finance economic development initiatives at every level.

CHANNEL GROWTH AND DEVELOPMENT IN THE COUNTY IN AN EFFICIENT, CONTEXT-SENSITIVE MANNER.

- Create and maintain a countywide property GIS database containing identified **underutilized commercial and industrial properties**. Measure vacancy and ratable value trends (improvement value) for said properties by consulting with local brokers and municipal real property tax assessors. Include information on square footage, frontage, zoning, utilities.
- Undertake analysis of options to maximize the redevelopment, reuse, or repurposing of the **Merck property**.
- Promote flexible zoning and other incentives to facilitate **conversion/redevelopment of vacant buildings** for new or mixed uses.
- Complete an analysis of potential **transit-oriented development (TOD)** sites in Hunterdon County.

- Support **shared services** through professional resources, assist in reviewing municipal zoning codes where density can be supported.
- Inform, encourage, and where appropriate, incentivize local planning and zoning boards regarding the benefits and importance of **housing density** and its relationship to economic revitalization.

PROVIDE ADEQUATE INVESTMENT FOR INFRASTRUCTURE

- Support **high speed internet access** in identified technology corridors as well as town centers.
- Work with energy providers to provide **redundancy** in concentrated areas of housing and business (electric, gas, phone, renewable).

INVEST IN AND IMPLEMENT ADEQUATE TRANSPORTATION OPTIONS FOR RESIDENTS AND BUSINESSES

- Implement complete interchanges on **Interstate 78** (i.e., Exit 20-Cokesbury Road).
- Address congestion on **Route 31** (and effects of lane changes of traffic) - complete dual lane Route 31.
- Implement recommendations of **Route 202** Corridor Assessment & Multi-Modal Plan-2009; including accommodations for transit, pedestrians, bicycles.
- Work with and coordinate with NJ Transit and private carriers to implement **public bus routes** and to service inter- and intra-county needs.
- Adopt and implement a countywide **Complete Streets policy**; encourage and facilitate the adoption of municipal Complete Streets policies as appropriate.

MAINTAIN A HIGH QUALITY OF LIFE

- Hire a **Cultural & Heritage Executive Director and Arts Coordinator** to promote, facilitate, and coordinate venues, artists, and historical events to promote Hunterdon County.
- Brand Hunterdon County as an **historic, arts, tourism, recreation, and farming county** that can identify, build, and capitalize on facilities for events promoting Hunterdon County's history and unique assets, and draw visitors to the County.
- Support Hunterdon County's core towns by considering designation as **official arts/historic districts** and commissioning a study and promotion of access and parking in these centers of arts and historic resources.
- Create a **4-year career academy** based on current trends and business needs.
- Create, draft and adopt a strategic **master plan for County parks and open space**.

NEW JERSEY URBAN MAYORS ASSOCIATION – URBAN FOCUSED CEDS (DRAFT)

INFRASTRUCTURE ASSET ENHANCEMENT: EXPANSION, PRESERVATION & RESILIENCE

- Encourage **public-private partnerships** through zoning.

- Work with DEP to convene Camden-style stakeholder group to manage **water infrastructure investments** in each community.
- Encourage each community to **integrate land use decision making into regional transit planning**.

SMALL BUSINESS DEVELOPMENT

- Coordinate with the **SBDC** to understand what they are doing and how to best promote their programs in each community.
- Use **Special Improvement Districts** to enhance commercial development and entrepreneurship in partnership with the SBDC.

TRAINING THE ECONOMIC ENGINE

- Pilot a **New Model for Workforce Partnership**: This is a novel combination of post-secondary institutions, libraries, workforce officials and business leaders.
- Establish a **"High-School-To-Work"** initiative.

IMPLEMENTATION ASSISTANCE – OFFICE OF NJUMA

- Create an **office within NJUMA**, to be staffed by Watson Institute personnel. This office will handle **implementation of the CEDS plan**, assisting each community in executing on various low-cost, existing resource, best practices actions.
- Help each community establish a **contact person** whom the **Business Action Center** can contact quickly and regularly as needed for attraction/expansion projects.
- Help each community make better use of the **"Area in Need of Redevelopment"** powers available under NJ law.
- **Advocate** for other CEDS initiatives.
- **Write grants** to USED.

COLLECTIVE MODULAR MARKETING PROGRAM

- **Low-cost business attraction-focused marketing**.
- **Marketing to new residents**: Getting the attention of your regional housing developers.
- Create a **brand and marketing strategy** and **set up a hotel tax to fund implementation**.

SOMERSET COUNTY CEDS (2013)

BUSINESS RESOURCES

- Commission a **market conditions** report for presentation to municipal governing bodies and planning boards.
- Prepare a population, housing, and economic report based on International Economic Development Council standards.
- Assist the State of New Jersey in delivering on its promise to offer a **clearer path and quicker answers on permitting and approval applications**.

- Develop a **joint clearinghouse and network for demographic, economic, and other data and GIS map resources via a web-based portal**. Host an annual forum to communicate trends and new market data, and provide hands-on workshops on how to access and utilize data.
- Identify targeted industries and establish **industry-specific taskforces** to remove barriers to growth and retention.
- Prepare a policy plan to **identify top economic drivers and how local land use, zoning, and regulations can be modified to address changes**.

RE-USE OF SIGNIFICANT PROPERTIES

- Propose a **statewide incentives package targeted at job creation and private-sector investment in suburban office markets**.
- Ensure that implementation of the State Strategic Plan **benefits suburban communities through infrastructure investments**.
- Deliver on the Somerset County Circulation Element objective to develop a **marketing program to attract targeted businesses**.
- Advocate for **state reform of local planning and land use to enable greater local-level flexibility to respond to changing market conditions**.
- Develop a **joint clearinghouse and network for demographic and economic data**, and GIS map resources via a web-based portal.
- Advocate for **access to NJ Clean Energy Programs by tenants of commercial and industrial properties**.

REDUCE THE REGULATORY BURDEN

- Explore the design and deployment of a county and municipal online land development application and construction permit submission and tracking system.
- Encourage the use of benchmarking accounting systems to measure energy savings following implementation of energy improvements.

HUDSON COUNTY CEDS (2012 UPDATE)

ECONOMY

- **Improve access to the port areas** and facilitate goods movement to increase international trade opportunities, and support the expansion and use of foreign trade zones.
- Review on a case-by-case basis the **conversion of industrial facilities that have become functionally obsolete** while also maintaining/relocating the stock of land available for industrial uses throughout the County.
- Facilitate the coordination of **multi-jurisdictional revitalization projects** that create connectivity between vibrant downtowns and economic centers.
- Identify and foster the growth and development of demand driven clusters and facilitate **connectivity between inter-regional markets**.

POPULATION AND GEOGRAPHY

- Coordinate programs between the 12 municipalities ensuring cooperation and **regional perspective**.
- Encourage a land use agenda that focuses on **“Placemaking,”** maintains the classic “Main Street” character and walkability of districts while creating a favorable business climate.

- Promote the **County as an “umbrella” resource for municipal organization and coordination.**
- Evaluate and coordinate **zoning districts** to meet the demands and capitalize on the economic potential of the changing settlement patterns of the County.
- Foster **public-private partnerships.**
- Maintain Community Development at the forefront of any economic development model, focusing on **creating places where people enjoy living, working, and visiting.**

RESOURCES AND ENVIRONMENTAL MANAGEMENT

- Continue to **redevelop and remediate Brownfield sites** into productive tax generating properties.
- Continue to **remediate and redevelop the waterfronts** of the Hudson, Passaic and Hackensack Rivers as competitive residential markets, desirable office space and attractive tourist destinations.
- Improve circulation within the County as well as through it to minimize congestion and enhance **connectivity to regional transportation networks.**
- Immediately address **channel depth limitations for marine freight transportation.**
- Encourage **transit-oriented development** (TOD) near transit stops that take advantage of the Urban Transit Hub Tax Credit program.
- Provide **incentives** to create stronger **transportation linkages and multi-modal options** between housing and employment centers.

WORKFORCE DEVELOPMENT AND USE

- Identify where there are labor skill shortages and focus on demand driven workforce training.
- Foster small business growth through business incubators and other support.

ECONOMIC DEVELOPMENT RECOVERY STRATEGY FOR NEW JERSEY (2010)

- Prepare for the Expansion of the Panama Canal: Immediately Formulate Definite and Realistic Plans for Eliminating the **Bayonne Bridge** as an Obstacle to the Ports of Newark and Elizabeth by 2014.
- **Assemble Land in Designated Growth Areas, Particularly Brownfield Sites, Remediate Them, and Sell the “Shovel-Ready” Sites to Developers at Cost** with Strings Attached or at Auction with Fewer or No Strings Attached.
- Auction-off **Redevelopment Rights** on State-Owned Land.
- End the Practice of **Last-Minute Re-Zonings**; Abolish the “Time of Decision” Rule.
- Revise the Municipal Land Use Laws to Recognize Vertical Development and **Encourage Density** in Smart Growth Areas.
- Create **Niche Industry Clusters**; Encourage More Scientific Collaboration with Nearby Research Hospitals and Universities.
- Increase New Jersey’s Share of **NIH Dollars.**

- Create Additional International **Free Trade Zones**.
- Create **Garden State Growth Zones**.

NEW JERSEY'S STATE DEVELOPMENT & REDEVELOPMENT PLAN (2012)

TARGETED ECONOMIC GROWTH

- OPA, using existing resources within State government and other outside experts, will **identify pilot RICs** through a collaborative and transparent process. Once identified, OPA will partner with industry leaders within the pilot RICs, local government, regional planning entities, and higher education institutions to identify needs (physical/regulatory/fiscal) to spur growth in these regions and meet future market opportunities.
- For the identified sectors of statewide significance, the Partnership for Action, along with other State agencies, will investigate and assist with physical and economic development challenges and opportunities, infrastructure needs, and a “critical path” regulatory analysis to encourage growth. The DOLWD “**Talent Networks**” will be used as a framework to identify these statewide planning challenges and opportunities.
- Relevant State agencies will review regulations that impact the growth of **tourism, farming/fishing and green energy sectors**.
- OPA will create **working groups to bring together industry leaders from the identified sectors** and officials from government and higher education to identify actions and resources needed to foster physical and economic development.

EFFECTIVE REGIONAL PLANNING

- EDA and partners will continue, where needed, to **assist property owners with identifying and potentially assembling land** in Priority Growth Investment Areas.
- The Brownfields Redevelopment Interagency Team (BRIT) / BAC will investigate a program that recognizes **industrial sites as ready for redevelopment**.
- The Department of Treasury and NJ Transit will assess opportunities for long-term job producing economic development through **public and private partnerships on appropriate vacant and/or underutilized State-owned land**.
- The New Jersey Department of Transportation (NJDOT) will identify improvements that will allow for **the lessening of weight restrictions on existing freight lines**. NJDOT will continue full engagement with the State's three Metropolitan Planning Organizations (MPOs) as they develop the State Transportation Improvement Programs and will connect project priorities to this Plan.
- DEP will identify opportunities for community **water treatment facilities** that would support higher density development in lieu of expanding regional wastewater systems and/or continued sprawl and review and identify changes to existing regulations related to Water Quality Management Planning regulations.
- OPA will participate in regional/statewide partnerships (e.g., DOT Transit Village Working Group) and identify strategies and resources needed to spur “**Transit Oriented Development**.”

- In collaboration with partners, OPA will work with local governments to identify amendments to the County Planning Act to better position county government to partner with municipalities to meet existing responsibilities under the Municipal Land Use Law (MLUL) in more efficient and cost-effective ways.

WHAT WILL IT TAKE TO SUPPORT NEW JERSEY'S INDUSTRY CLUSTERS? (2013)

ADVANCED MANUFACTURING

- Continue to promote industry through Talent Networks initiative and increase **partnerships between trade schools, community colleges, and higher education.**
- Continue investment in **water and sewer infrastructure** in strategic locations to support Advanced Manufacturing activities.
- Develop usage of **freight rail** and other non-vehicular logistical options.

FINANCE

- Encourage **residential development and mixed use projects at transit hubs** to attract creative class workers.
- Improve **mass transit links between financial hubs** within the state making commuting and business travel more efficient and effective.
- Ease **commuting times to high-density areas** with financial sector jobs.

HEALTHCARE

- Continue to fund programs aimed at addressing **nursing shortage** within the state.
- Increase **incentives for construction and improvement to hospitals.**
- Increase **transit links** to make healthcare more accessible.
- Incentivize **on-site power generation** at critical hospitals and facilities.

LIFE SCIENCES

- Continued investment to maintain and improve existing **water and sewer infrastructure** service areas.
- Consider Innovation NJ/NJPRO "Building Bridges II" report on encouraging academia, industry and the state **to work together to leverage research and development assets** to build New Jersey's "Innovation Economy".
- Develop **laboratory space specialized for biotechnology companies** in areas with high access to transit and quality water and sewer infrastructure.
- Prioritize **investment of New Jersey higher education** "Building Our Future Bond Act" **to align with industry cluster needs.**

TECHNOLOGY

- State level agencies such as the Economic Development Authority should continue funding **technology incubator space for start-up companies.**

- Provide **infrastructure and support systems** to start up technology companies.
- Monitor **Angel Investment and Venture Capital** activity as an economic indicator of this industry.

TRANSPORTATION, LOGISTICS AND DISTRIBUTION

- Push for fast track completion of the Port Authority of New York and New Jersey's **raising the Bayonne Bridge Project**.
- Implement planned **freight rail capital improvements** to improve distribution network.
- **Integrate ports and freight rail system** to lessen reliance on vehicular movement of goods.

DEFENSE

- Utilize the **Fort Monmouth** Redevelopment Authority to create suitable land use plans that brings reuse, business development and employment to the former Fort Monmouth site that will benefit the local economy.
- Continue to support businesses seeking **military contracts** through incentives and business development initiatives.
- Support a new updated study that examines the **economic contribution of military and Coast Guard installations** in New Jersey.

TOURISM

- Encourage the **rebuilding of infrastructure in a sustainable and resilient way** that balances environmental concerns with common sense.
- **Aggressively market and promote recovery efforts** to enhance perceptions and patronage of areas ready to receive tourists.
- Continue to look towards **innovative transportation solutions to move tourists to New Jersey destinations**, such as a regional fare card during the Super Bowl.
- The industry should explore **mobile technology** that helps guide tourists to new experiences and activities.

SUSSEX COUNTY TARGET BUSINESS AND INDUSTRY ANALYSIS (2007)

- Identify **primary locations for new development**.
- Ensure that primary locations agree with **statutory and regulatory standards or requirements**.
- Develop/coordinate plans to **provide infrastructure** for primary development sites.
- Monitor programs and activities at **Picatinny Arsenal** for industry targeting.
- Assess **redevelopment areas** for industry targeting.
- Undertake and **industry targeting program**.
- Maintain and enhance systematic **business retention/expansion program**.
- Organize **publicize resources to assist businesses**.

- Continue and expand the effort to **match Sussex residents to Sussex job openings**. Publicize the new Economic Development Partnership website.
- Include **quality of life considerations** in both the planning for and marketing of the county.
- Develop a **one-stop permitting program**.
- Establish, fund, and operate a **county office of economic development**.
- **Collaboration among government and economic development entities**.
- Prepare and maintain a **roster of business assistance and incentive program**.
- Develop and maintain a **network of economic development contacts**.
- Develop an **“investment pool” of local funds for economic development**.

NEW JERSEY MEADOWLANDS COMMISSION ECONOMIC GROWTH PLAN (2007)

- Establish an **Economic Growth Strategy Group**.
- Embark on a series of initiatives to **improve business access to state assistance**.
- Establish a Meadowlands **Workforce Development Consortium**.
- Work to further promote **responsible land use planning policies** throughout the Meadowlands Region.
- Work to improve the **transportation system** within the Meadowlands District.
- Implement policies that reduce the **impacts of flooding** in the District.
- Target economic growth efforts on the **specific industries and sectors** stated in the Governor's Economic Growth Strategy Report.
- Establish a **Meadowlands Business Incubator**.
- Implement **policies and strategies that support small, women-owned, minority-owned** and local businesses.
- Increase the **sharing of municipal services** in the Meadowlands District.
- Analyze and implement policies that **streamline state and local permitting processes**.
- Establish an **Office of Economic Growth to develop and implement the economic growth strategies** contemplated in this report.

NEW JERSEY'S UNIFIED INVESTMENT PLAN (2012)

DRIVING INVESTMENTS BASED ON INDUSTRY NEEDS

- Establish **Talent Advisory Councils**.
- Create **talent development strategies**.

- Continue and expand **Talent Networks**.
- Expend **industry-focused services** for jobseekers and employers.
- Strengthen partnerships between **Talent Networks and Employer Services**.
- **Implement regional planning** following submission of state plan.
- Explore strategies to **develop regional partnerships**.

MEETING JOBSEEKERS WHERE THEY ARE

- Create **network of access points** to expand the reach of the one stop career centers.
- Create a strategy to **provide career information about each of the state's key industries**.
- Launch **Jersey Jobs Clubs**.
- Coordinate and consolidate **virtual talent development services**.
- Develop ability of **Onramp** to suggest re-employment strategies based on resumes.
- Expand **professional development** offerings.
- Develop **Jobs4Jersey University**, a shared online portal for professional development resources.
- Create a standard of set **jobseekers workshops**.
- Organize an **annual talent development conference**.

EQUIPPING THE WORKFORCE FOR EMPLOYMENT

- Develop a **statewide literacy strategy**.
- Explore **work readiness credential options** most relevant to New Jersey employers.
- Strengthen the **demand occupations list**.
- Emphasize **On-the-Job Training** as an effective re-employment strategy.
- Create **industry-focused training and re-employment partnerships**.
- Develop **stackable credential models** as part of the creation of talent development strategies for key industries.

RESOURCE MATRIX



RESOURCE MATRIX

Below are descriptions of existing organizations that can serve as resources for implementing the regional CEDS. Where possible, contact information has been provided for each organization.

INITIATIVE/ORGANIZATION		DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME:	AFRICAN AMERICAN CHAMBER OF COMMERCE OF NEW JERSEY	The African American Chamber of Commerce of New Jersey, Inc., (AACCNJ) is dedicated to economically empowering and sustaining African American communities and businesses through entrepreneurship and capitalistic initiatives throughout the State of New Jersey and through its partnership with the National Black Chamber of Commerce, Inc. (NBCC).
CONTACT:	John Harmon Sr. jharmon@aaccnj.com www.aaccnj.com	
TYPE:	Non-Profit	
GOAL:	Small Business/Entrepreneurship	
NAME:	BERGEN COUNTY COMMUNITY ACTION PARTNERSHIP, INC	Bergen County Community Action Partnership, Inc. (BCCAP) is a 501 (c) (3), not-for-profit Community Action Agency. Established in 1967, BCCAP is Bergen County's designated anti-poverty agency. BCCAP provides a wide range of programs to assist the poor, the homeless, substance abusers, children, senior citizens, the foreign born, and others. Services are provided through the operation of over 140 housing (transitional and permanent) units, comprehensive housing support services, adult education, employment training and permanent job placement, five early childhood education centers and several other human services facilities. BCCAP programs draw upon multiple funding and support streams from federal, state and local governments, and the corporate, community and philanthropic sectors.
CONTACT:	201-968-0200 info@bergencap.org www.bergencap.org	
TYPE:	Non-Profit	
GOAL:	Asset Based Development	
NAME:	BERGEN ECONOMIC DEVELOPMENT CORPORATION	BCEDC is the economic development corporation for Bergen County.
CONTACT:	Maggie Peters 201-336-7500 www.co.bergen.nj.us/Index.aspx?NID=155	
TYPE:	Public	
GOAL:	Small Business/Entrepreneurship	

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: BIONJ CONTACT: www.bionj.org TYPE: Non-Profit GOAL: Regional Innovation Clusters	Founded in 1994, BioNJ has been hard at work in its mission to enhance the climate for biotechnology in the state. As the representative of an industry that has the potential to change the course of human health, make our environment cleaner and the foods we eat safer and healthier, BioNJ is single-minded in its commitment to the growth and prosperity of this industry within the state of New Jersey.
NAME: BRICK CITY DEVELOPMENT CORPORATION CONTACT: Lyneir Richardson 973-273-1040 RichardsonL@bcdcn Newark.org www.bcdcn Newark.org TYPE: Public/Private GOAL: Small Business/Entrepreneurship	Brick City Development Corporation (BCDC) is the primary economic development catalyst for Newark, New Jersey, organized to retain, attract and grow businesses, enhance small and minority business capacity, and spur real estate development within the city. As a business development company, we initiate and execute economic development activities to produce and sustain economic growth, generate jobs and create wealth for the citizens of Newark. Our team serves as advocates within the city's municipal structure and provides a hands-on client management approach.
NAME: BUSINESS DEVELOPMENT CENTER, ASBURY PARK CONTACT: Roger Boyce 732-455-0519 info@BusinessDevCenter.org www.businessdevcenter.org TYPE: Non-Profit GOAL: Small Business/Entrepreneurship	The Business Development Center (BDC) was established in 2011 to help entrepreneurs grow their current businesses or start new ones. It is sponsored by Interfaith Neighbors, Inc. (www.interfaithneighbors.org) a not-for-profit, community benefit corporation serving all of Monmouth County. The BDC is funded by a combination of private grants and tax credit programs. The BDC offers a combination of business support services and incubator facilities. Specifically, we support economic development and local business needs through: business workshops and entrepreneurial training; no-fee business mentoring services; operation of a traditional business incubator facility; access to financing resources; and access to our business network.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: BUSINESS DEVELOPMENT INCUBATOR NEW JERSEY CITY UNIVERSITY CONTACT: Joseph Tetteh 201-200-2313 bdi@njcu.edu www.njcu.edu/bdi TYPE: Higher Education GOAL: Small Business/Entrepreneurship	The Business Development Incubator (BDI) at New Jersey City University (NJCU) is an integral part of the Smart Growth Redevelopment Plan for Jersey City-Westside and is located in a designated New Jersey Urban Enterprise Zone. BDI facilitates the formation and development of technology-based entrepreneurial ventures with higher-skill, higher-wage jobs, helping them survive and grow during their critical start-up period. BDI assists young, small companies to commercialize their products, processes and services by providing private office space, shared office resources, and access to technical, financial, legal, marketing, and management assistance.
NAME: CENTER FOR ADVANCED INFRASTRUCTURE AND INNOVATION—FREIGHT AND MARITIME PROGRAM CONTACT: 732-445-0579 www.cait.rutgers.edu/fmp TYPE: Higher Education GOAL: Regional Innovation Clusters	The Freight Management Program (FMP) is a dedicated academic initiative incorporating research, education, and training activities in the fields of: freight logistics, maritime and rail transportation, global supply chain management, urban goods movement, ports and marine terminals, and intermodal freight and distribution facilities. FMP operates within the Rutgers' Center for Advanced Infrastructure and Transportation, a US Department of Transportation-designated University Transportation Center.
NAME: CHOOSE NEW JERSEY CONTACT: Tracye McDaniel 609-297-2200 EconDev@choosenj.com www.choosenj.com TYPE: Non-Profit GOAL: Regional Innovation Clusters	CNJ is an independently funded and operated 501(c)(3) nonprofit corporation created to encourage and nurture economic growth throughout New Jersey, including a focus on making the state's most distressed cities engines for growth and opportunity. It is 100 percent funded by private-sector contributors. New Jersey is one of only a handful of states that has charged a non-governmental agency with state-wide marketing efforts for economic development purposes.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: CLEAN ENERGY SOLUTIONS/NJEDA CONTACT: 866-534-7789 www.njeda.com TYPE: State GOAL: Regional Innovation Clusters	In order to promote a green economy in New Jersey, the EDA has created Clean Energy Solutions (CES). This suite of financing programs includes interest-free loans and grants to ensure that commercial, industrial and institutional entities have the resources they need to grow and prosper while simultaneously reducing New Jersey's carbon footprint. Ultimately, CES supports New Jersey's commitment to clean and renewable energy. Financing programs include the Edison Innovation Clean Energy Manufacturing Fund (CEMF), Clean Energy Solutions Large Scale CHP - Fuel Cells Program, and the Edison Innovation Green Growth Fund (EIGGF).
NAME: COMMERCIALIZATION CENTER FOR INNOVATIVE TECHNOLOGIES CONTACT: Donald Shatinsky 732-729-0022 www.njeda.com/ccit TYPE: State GOAL: Small Business/Entrepreneurship	The Commercialization Center for Innovative Technologies (CCIT) is one of the more significant incubation facilities in the nation dedicated to life sciences and biotechnology companies. Located in the heart of the state's "Research Corridor" on the campus of the Technology Centre of New Jersey, the 46,000-square-foot CCIT facility offers the most wet labs in the state for incubation. Affordable and customizable office, production, and "plug-in ready" wet and dry laboratory space is available to qualified tenants. One of the best advantages of locating in CCIT is being a part of the unique corporate technology transfer initiative. This program has been established to spur collaboration and business opportunities by linking small life sciences and biotechnology startup businesses with major corporations in the state. The initiative encourages a more rapid transfer of discoveries from the laboratory to the marketplace, and fosters collaborations with public research and medical research.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: COUNCIL FOR AIRPORT OPPORTUNITY CONTACT: John B. Perry 973-961-4382 www.caony.com/frameset.htm TYPE: Non-Profit GOAL: Asset Based Development	The Council for Airport Opportunity (CAO) is a not for profit trade association created in 1972 through a partnership of airline companies, the Port Authority of New York and New Jersey and including the Mayor's Offices of the City of Newark and City of New York and the Federal Aviation Administration. The CAO's mission is to promote the growth and development of job opportunities in the aviation industry for residents of the communities surrounding the New Jersey and New York metropolitan airports while at the same time responding to the human resource needs of airport employers.
NAME: DOWNTOWN NEW JERSEY CONTACT: 888-228-8116 www.downtownnj.com TYPE: Non-Profit GOAL: Asset Based Development	Downtown New Jersey is the organization of individuals, businesses, government agencies, and local and regional organizations that are passionate about downtowns. Downtowns provide a focal point for our communities, reflect their unique identities, provide a convenient local place of commerce, provide our communities a sense of place, and offer a place in which people gather and truly be community. Downtown New Jersey is a resource dedicated to ensuring the vitality of our downtowns. Count on us as your resource for anything regarding downtowns in New Jersey.
NAME: ENTERPRISE DEVELOPMENT CENTER NEWARK CONTACT: Jerry Creighton, Sr. 973-643-4063 Jerry.Creighton@njit-edc.org www.njit-edc.org TYPE: Higher Education GOAL: Small Business/Entrepreneurship	Technology and life-science startups face many challenges along the way to becoming profitable businesses and dynamic participants in the economic life of New Jersey and the nation. Meeting the challenges of successful commercialization requires a broad range of knowledge and resources — from finding the right working space and attracting investment capital to building staff and developing effective business plans and marketing strategies. Since 1988, the EDC — the Enterprise Development Center — operated by New Jersey Institute of Technology (NJIT) has given startups a critical edge in all of these areas.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: GREATER NEWARK ENTERPRISES CORPORATION CONTACT: 973-242-4132 www.gnecorp.org TYPE: Non-Profit GOAL: Small Business/Entrepreneurship	Greater Newark Enterprises Corporation is a community development corporation, and Certified CDFI, established in 2005. GNEC provides financial assistance and training to small businesses in a variety of topical areas, including financial literacy for entrepreneurs, business planning and business management across industries. GNEC is organized to encourage and assist commercial enterprises, including those owned by minority, women and low-income entrepreneurs possessing the capability to operate successful business concerns.
NAME: HUDSON COUNTY CHAMBER CONTACT: Maria Nieves 201-386-0699 info@hudsonchamber.org www.hudsonchamber.org TYPE: Non-Profit GOAL: Small Business/Entrepreneurship	The Hudson County Chamber of Commerce unites the region around a common goal of enhancing the economic vitality of Hudson County. Since 1888, the Chamber has been central to building valuable relationships and providing resources to business. "We Make it Happen" for more than 350 businesses and organizations located in Hudson County—one of the most dynamic and diverse counties in the State of New Jersey.
NAME: JUICETANK CONTACT: Mukesh M. Patel 908-505-5735 www.juicetank.com TYPE: Private GOAL: Small Business/ Entrepreneurship	JuiceTank is an Innovation Lab and Incubator-Accelerator that fuels startups. It is a venture platform that discovers, grows, and inspires successful entrepreneurs. Its Incubator-Accelerator is designed to incubate startups as well as accelerate the growth and success of entrepreneurial ventures through an array of business resources, including an innovation lab, co-working space, capital, advisory, common services, and networking connections. JuiceTank focuses on startup, early-stage, and emerging-growth ventures. It has designed an entrepreneurial eco-system led by seasoned serial entrepreneurs and powered by strategic partnerships and joint ventures.

INITIATIVE/ORGANIZATION		DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME:	LOCAL INITIATIVES SUPPORT CORPORATION NEWARK	LISC is a national organization with a community focus, which has operated nationally for 30 years. Since 1986, Greater Newark LISC has collaborated with community based organizations in Newark and the surrounding region to improve the quality of life for residents and shopkeepers. Its local Building Sustainable Communities strategy seeks to build upon this base as it supports a targeted, yet more comprehensive, revitalization strategy within its local footprint.
CONTACT:	Rhonda Lewis rlewis@lisc.org 973-624-6676 www.lisc.org/greaternewark/index.php	
TYPE:	Non-Profit	
GOAL:	Asset Based Development	
NAME:	MANUFACTURING TALENT NETWORK/MANUFACTURENJ	ManufactureNJ brings New Jersey's advanced manufacturing companies together with educational and public workforce organizations so workers can improve skills and manufacturers can get and grow the skilled workers they need when they need them.
CONTACT:	www.manufacturenj.org contact@manufacturenj.org	
TYPE:	Non-Profit	
GOAL:	Regional Innovation Clusters	
NAME:	MEADOWLANDS REGIONAL ACCELERATOR AT BERGEN COMMUNITY COLLEGE	The Meadowlands Regional Accelerator at Bergen Community College provides early stage businesses the support services, guidance and networking opportunities that are critical to changing an idea, product, technology or service into a successful business. A project of Bergen Community College, the Accelerator is committed to providing the resources and support early stage companies need to reduce the time it takes to commercialize and become self-sustaining.
CONTACT:	Shirley Pachon 201-612-5360 spachon@bergen.edu www.bergen.edu	
TYPE:	Higher Education	
GOAL:	Small Business/Entrepreneurship	
NAME:	NEW JERSEY ASSOCIATION OF WOMEN BUSINESS OWNERS	NJAWBO (The New Jersey Association of Women Business Owners) is the largest statewide women business owners' organization in New Jersey. Its primary objective is to support and encourage business ownership by women. Since 1978, NJAWBO has helped women achieve their business visions by providing them with the tools to develop and grow their enterprises.
CONTACT:	609-308-2530 njawbo@njawbo.org www.njawbo.org	
TYPE:	Non-Profit	
GOAL:	Small Business/Entrepreneurship	

INITIATIVE/ORGANIZATION		DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME:	NEW JERSEY BUSINESS ACTION CENTER	The New Jersey Business Action Center plays a key role in helping grow, retain and attract business to the State. The center serves as a “one-stop” shop for business. The team at the Center works to encourage entrepreneurship by supporting New Jersey’s businesses of all sizes, supporting global competitiveness of New Jersey companies, as well as to promote the State’s attractiveness as a vacation destination and business investment location nationally and internationally.
CONTACT:	866-534-7789 www.newjerseybusiness.gov	
TYPE:	State	
GOAL:	Small Business/Entrepreneurship	
NAME:	NEW JERSEY BUSINESS INCUBATION NETWORK	The New Jersey Business Incubation Network (NJBIN) is a collaborative statewide community of business experts and resource facilities dedicated to enhancing the commercial success of early stage and expansion stage entrepreneurial companies, growing higher paying jobs, and supporting the economic growth strategy for the state. Early stage and expansion stage companies receive critical support services and flexible space in a professional business environment. In 2012, NJBIN grew to fourteen incubators.
CONTACT:	Suzanne Zammit suzannez@camden.rutgers.edu www.njbin.org	
TYPE:	Non-Profit	
GOAL:	Small Business/Entrepreneurship	
NAME:	NEW JERSEY COMMUNITY CAPITAL	New Jersey Community Capital is a 501(c)(3) nonprofit, Community Development Financial Institution (CDFI) that provides innovative financing and technical assistance to organizations that support housing and sustainable community development ventures that increase jobs, improve education and strengthen neighborhoods. It offers loan capital that is broader than bank lending to results-oriented, socially responsible organizations that are committed to creating positive change in low-to-moderate income communities throughout New Jersey.
CONTACT:	732-640-2061 mail@njclf.com www.newjerseycommunitycapital.org	
TYPE:	Non-Profit	
GOAL:	Asset Based Development	
NAME:	NEW JERSEY LABORERS UNION	The New Jersey Laborers Union is the 20,000 member affiliate of the Laborers’ International Union of North America, the most progressive, aggressive and fastest-growing union of construction workers, public sector workers, and service workers. Its members serve throughout the Garden State. LIUNA was founded more than a century ago and its members are united through collective bargaining agreements which help earn family-supporting pay, good benefits and the opportunity for advancement and better lives.
CONTACT:	www.njlaborers.org	
TYPE:	Non-Profit	
GOAL:	Workforce Training	

INITIATIVE/ORGANIZATION		DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME:	NEW JERSEY MAKERSPACE ASSOCIATION	Makerspaces are creative laboratories where members with common interests-such as engineering, computer programming, inventing, graphic design, and others-gather to share resources and knowledge, network, and build things.
CONTACT:	Stephen Carter scarter@rutgers.edu www.njmakerspace.org	
TYPE:	Non-Profit	
GOAL:	Small Business/Entrepreneurship	
NAME:	NEW JERSEY SMALL BUSINESS DEVELOPMENT CENTER	The New Jersey Small Business Development Center was established by Congress in 1978 as one of the first national SBDC pilot projects resulting from the passage of Public Law 96-302. At present the NJSBDC network is composed of the headquarters located at Rutgers Business School - Newark and New Brunswick, and 11, full-service, regional centers, and an additional 27 affiliate (or satellite) offices located throughout the state. Regional centers are hosted by and affiliated with a two- and four-year college and university business programs with a major footprint for comprehensive Business assistance and outreach.
CONTACT:	800-432-1565 sbdinfo@njsbdc.com www.njsbdc.com	
TYPE:	Public/Private	
GOAL:	Small Business/Entrepreneurship	
NAME:	NEW JERSEY STATE TALENT NETWORKS/ NJ DEPARTMENT OF LABOR AND WORKFORCE DEVELOPMENT	These Talent Networks have been established to focus on the specific needs of key industries in the state in order to connect employers, job seekers, the state's One Stop Career Centers and educational institutions to achieve the common goal of helping current job seekers develop relevant skills that lead to job opportunities, helping employers find qualified employees, and to ensure that New Jerseyans have access to training and educational opportunities that lead to the jobs of the future. Existing networks include Advanced Manufacturing; Financial Services; Health Care; Life Sciences; and Transportation, Logistics, & Distribution. Networks under construction include Technology & Entrepreneurship and Retail, Hospitality and Tourism.
CONTACT:	www.jobs4jersey.com/jobs4jersey/toolkit/talent	
TYPE:	State	
GOAL:	Workforce Training	

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: NEWARK WORKFORCE INVESTMENT BOARD CONTACT: Nelida Valentin 973-733-5995 info@newarkwib.org www.newarkwib.org TYPE: Non-Profit GOAL: Workforce Training	The Newark Workforce Investment Board, Inc. is a non-profit 501c3 organization created pursuant to the Workforce Investment Act of 1998 (WIA). The purpose of WIA is to provide workforce investment activities that increase employment, retention, and earnings of participants. WIA provides a unique opportunity to establish a localized, full-service employment and training system to make programs and resources easily accessible to job seekers and employers.
NAME: NJ ONRAMP CONTACT: www.jobs4jersey.com TYPE: State GOAL: Workforce Training	OnRamp offers an exciting and unique way for employers in and around New Jersey to conduct a talent search, by providing the ability to search job candidates based on skill sets, rather than simply job title.
NAME: NJ SPORTS & EXHIBITION AUTHORITY CONTACT: Wayne Hasenbalg 201-935-8500 www.njsea.com TYPE: State GOAL: Regional Innovation Clusters	The mission of the NJSEA is for the state, its citizens, and guests to reap the entertainment and economic benefits from the Authority facilities for generations. The NJSEA will provide the world's best in sports and entertainment. It will represent the citizens of New Jersey in a manner that makes all residents of the Garden State proud. The NJSEA will invest in its facilities to ensure a positive impact on job creation and tourism, throughout the 21st Century.
NAME: OPPORTUNITY4JERSEY CONTACT: 609-633-6799 cttshelpdesk@dol.state.nj.us www.jobs4jersey.com TYPE: State GOAL: Workforce Training	Opportunity4Jersey is a grant program designed to help build a pipeline of future employees for your business. Grants are awarded to post-secondary educational institutions and approved training providers. You must be working with a New Jersey employer, a consortia of employers, or a Talent Network from one of the demand fields. The employer(s) must make a commitment to hire your trainees for a period of at least six months upon their successful completion of training.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: PICATINNY INNOVATION CENTER CONTACT: Mark Merclean 973-442-6400 mmerclean@ccm.edu www.picinnovation.org TYPE: Public/Private GOAL: Small Business/Entrepreneurship	The goal of the Picatinny Technology Innovation Center is to accelerate the successful commercialization of new products by entrepreneurial technology companies and corporate development teams, by supplying a supportive and resourceful infrastructure. The Innovation Center provides a broad base of support including business, technical and financing assistance, shared business services to reduce overhead costs, access to the considerable resources and technology of the United States government, and reasonably priced space on the grounds of the Picatinny Arsenal in Dover, New Jersey.
NAME: PICATINNY ARSENAL CONTACT: 973-724-6364 www.pica.army.mil/ TYPE: Federal GOAL: Small Business/Entrepreneurship	The Picatinny Arsenal, located in northwest Morris County, New Jersey, is the home of the Armament Research, Development and Engineering Center of the United States Army. Home to over 3200 scientists, engineers and support staff, its highly skilled workforce develops new technologies to address the requirements of the modern Army and often adapts existing commercial technologies to the high-performance requirements of the military. As a part of its mission as a Federal Laboratory, Picatinny Arsenal supports the advancement of science through the transfer of government developed technologies to the private sector and networking with other technologists, especially those in fields of cutting edge technology through its office of Technology Transfer. For technical assistance in compatibility testing, or in the design and fabrication of prototypes, tenants in the Innovation Center can access the resources of Picatinny through a Cooperative Research & Development Agreement (CRADA).
NAME: RECOVERY4JERSEY CONTACT: 877-682-6238 Recovery4Jersey@dol.state.nj.us www.jobs4newjersey.com TYPE: State GOAL: Workforce Training	Recovery4Jersey helps you rebuild your business by allowing you to hire the people you need to do the work you need done. This on-the-job training program will offset 50% of your new workers' wages. Under this program, new employees get on-the-job training for a specific skills set. The program helps you defray the costs of training new employees—and gives unemployed workers new skills, as well as permanent, full-time employment.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: RISING TIDE CAPITAL CONTACT: Alex Forrester 201-432-4316 Info@RisingTideCapital.org www.risingtidecapital.org TYPE: Public/Private GOAL: Small Business/ Entrepreneurship	Rising Tide Capital is a 501-c-3 non-profit organization based in Jersey City, NJ, transforming lives and communities through entrepreneurship. Our programs support women, minorities, immigrants and other traditionally marginalized populations to start and grow successful businesses. By investing in the entrepreneurial spirit that already exists in distressed communities, we can make a lasting difference. Rising Tide Capital's programs provide entrepreneurs with: knowledge Capital-affordable classes that teach entrepreneurs how to plan, start and run a business; social Capital- professional coaching, mentoring and networking opportunities with other entrepreneurs and local business experts; and access to Financial Capital- guidance on financial planning and accessing funding.
NAME: SKILLS4JERSEY CONTACT: 609-633-6799 cttshelpdesk@dol.state.nj.us www.jobs4jersey.com TYPE: State GOAL: Workforce Training	Skills4Jersey training grant funds are available to New Jersey employers to upgrade the skills of their current employees and/or train new employees, for purposes of retaining highly skilled and high wage jobs in New Jersey.
NAME: STATEWIDE HISPANIC CHAMBER OF COMMERCE OF NEW JERSEY CONTACT: chamber@shccnj.org 973-900-5886 www.shccnj.org TYPE: Non-Profit GOAL: Small Business/Entrepreneurship	The Statewide Hispanic Chamber of Commerce (SHCC) is a voluntary membership network of individuals, businesses, Hispanic Chambers of Commerce, and professional business associations across New Jersey and the Philadelphia area. They seek to represent over seventy-five thousand businesses and work to: expand business opportunities; encourage mutually beneficial ties with the public and private sectors; serve as an advocate in the political process; and actively promote trade among the business community of New Jersey, national, and international counterparts.

INITIATIVE/ORGANIZATION	DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME: TECHNOLOGY CENTRE OF NEW JERSEY/NJEDA CONTACT: Jim Medenbach jim.medenbach@am.jll.com www.njtechcentre.com TYPE: Higher Education GOAL: Small Business/Entrepreneurship	Located in the heart of the state's "Bioscience Cluster" between Rutgers and Princeton Universities, is the Technology Centre of New Jersey. A 6 building and 3 build-to-suit site campus on 75 acres consists of approximately 325,000 square feet of lab, production and office space; as well as +/- 560,000 square feet of build-to-suit sites. The Tech Centre, with over \$100 million invested in facilities and improvements, has been specifically designed to meet the lab and office needs of emerging research and development companies in the biosciences, microelectronics, advanced materials and communications technologies industries. Stand-alone facilities from 5,000 to 60,000 square feet can accommodate state-of-the-art clean rooms and wet labs. The campus offers young, growing firms, as well as large established companies, customizable laboratory and production facilities at below-market rent. The Tech Centre is also home to the Commercialization Center for Innovative Technologies (CCIT), which is one of the most recognized incubators of its kind in the world and recently won its third Soft Landings International Incubator design. nation from the National Business Incubation Association. CCIT offers individual wet and dry lab modules of 800 square feet, combinable up to 6,000 square feet, to qualified tenants.
NAME: THE INCUBATOR INC./THE BOSS PLAINFIELD CONTACT: Jeffery Dunn 908-757-5155 www.thebusinessonestopservice.com TYPE: Public/Private GOAL: Small Business/ Entrepreneurship	The Incubator inc./The BOSS (Business One Stop Service) offers centralized business resources including access to various private /public business development organizations to enable businesses to develop and grow. The BOSS provides a holistic, collaborative environment of education and training to entrepreneurs and business owners about the business and politics of business. Rental Space Currently Available—Conference Room (By The Hour Or Day)—Training Rooms—Furnished Office Space—6,000 Sq. Ft. Warehouse With Drive Up Ramp.

INITIATIVE/ORGANIZATION		DESCRIPTION (FROM ORGANIZATION WEBSITES)
NAME:	UCEDC	UCEDC is a statewide, not-for-profit economic development corporation dedicated to assisting and financing small businesses and minority- and women-owned enterprises. Access to capital is often a small business owner's greatest challenge and UCEDC offers a variety of financing options when conventional lending sources are not available. With loans ranging from \$500 to \$5 million, including microloans, SBA 7a, and SBA 504 loans, UCEDC will work with start-up and established businesses to find the right financing solution.
CONTACT:	908-527-1166 info@ucedc.com www.ucedc.com	
TYPE:	Non-Profit	
GOAL:	Small Business/ Entrepreneurship	

NORTH JERSEY DISTRESSED COMMUNITIES AND PROGRAMS



NORTH JERSEY DISTRESSED COMMUNITIES AND PROGRAMS

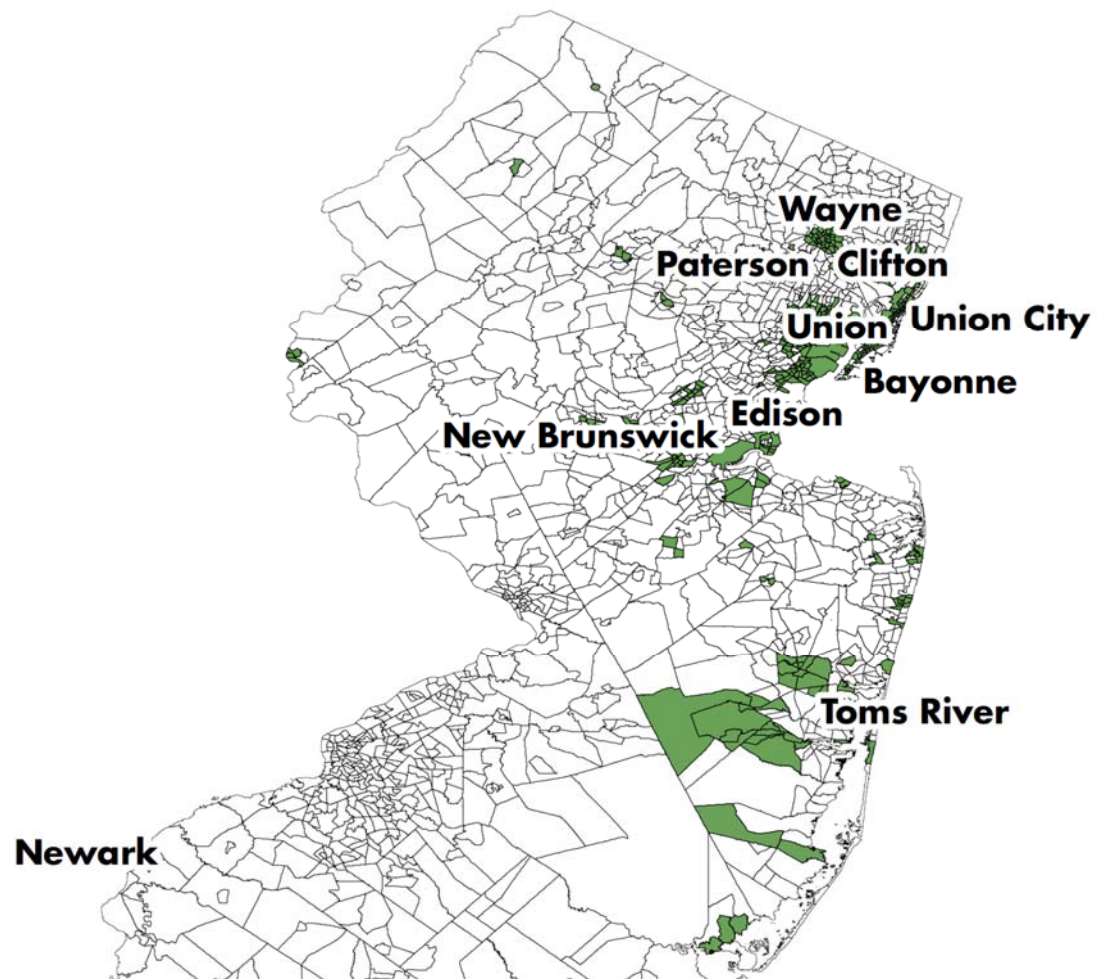
New Jersey is a very diverse state that includes some very affluent communities as well as many distressed areas. A broader goal of the CEDS is to identify strategies and programs designed to improve economic conditions in such communities. Below is a summary of federal and state assistance programs and the communities in North Jersey that are classified as distressed and therefore meet eligibility requirements.

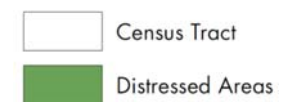
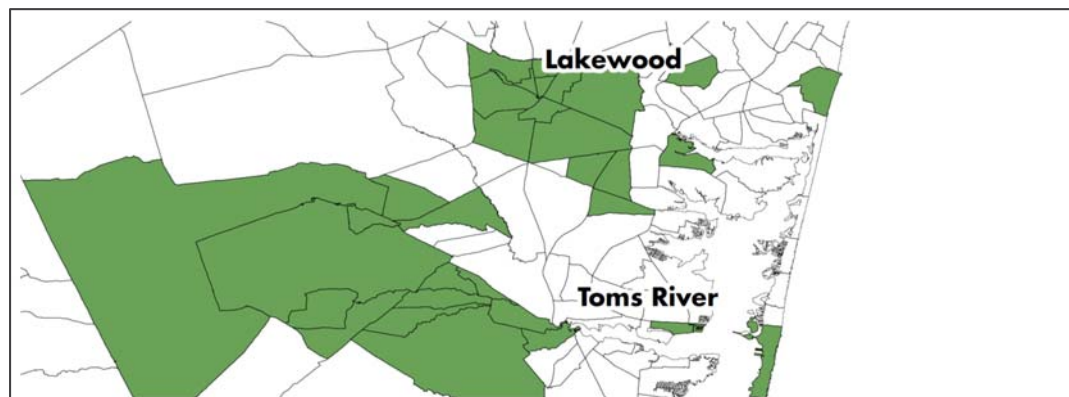
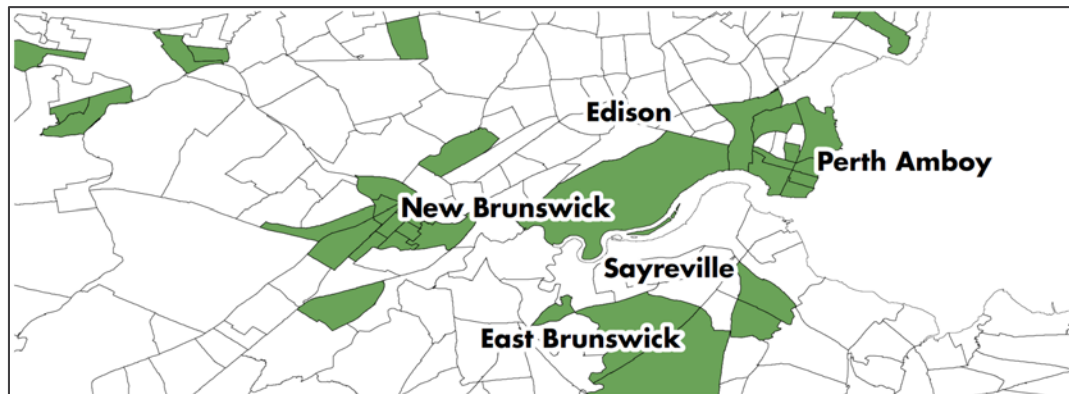
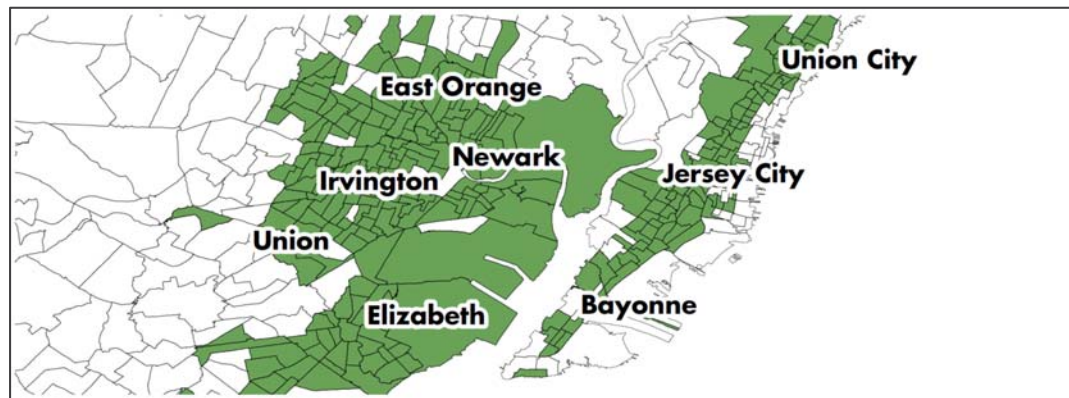
COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND (CDFI) US DEPARTMENT OF TREASURY NEW MARKETS TAX CREDIT (NMTC) PROGRAM

The New Markets Tax Credit Program (NMTC Program) was established by Congress in 2000 to spur new or increased investments into operating businesses and real estate projects located in low-income communities. The NMTC Program attracts investment capital to low-income communities by permitting individual and corporate investors to receive a tax credit against their Federal income tax return in exchange for making equity investments in specialized financial institutions called Community Development Entities (CDEs).

Census tracts are eligible for the NMTC program if they meet any of the following criteria. First, tracts are eligible if they have a poverty rate equal to or greater than 20%; or if the tract's median family income in non-metropolitan tracts is equal to or less than 80% of the state median income; or tracts are eligible if the tract's median family income in metropolitan tracts is equal to or less than 80% of the maximum median income of state or CBSA median income.

In the NJTPA region, 481 census tracts qualify for the NMTC program on poverty or income criteria.





**DEPARTMENT OF COMMUNITY AFFAIRS
NEIGHBORHOOD REVITALIZATION TAX CREDIT (NRTC)
ELIGIBLE MUNICIPALITIES*
FY 2013**

The Neighborhood Revitalization Tax Credit Program (NRTC) provides business entities a 100 percent tax credit for funds provided to nonprofit entities carrying out comprehensive revitalization plans. Nonprofit entities must use at least 60% of the tax credit funds for housing and economic development; the remaining funds may be used for supportive services and other activities that promote neighborhood revitalization.

www.state.nj.us/dca/divisions/dhcr/offices/nrtc.html

*Current as of 10/17/2012

**Eligible for funding under Qualified Bond designation

MUNICIPALITY	COUNTY	MUNICIPALITY	COUNTY
Asbury Park City	Monmouth	Long Branch City	Monmouth
Bayonne City	Hudson	Montclair Township	Essex
Belleville Township	Essex	Neptune City	Monmouth
Bloomfield Township	Essex	Neptune Township	Monmouth
Brick Township	Ocean	New Brunswick City	Middlesex
Carteret Borough	Middlesex	Newark City	Essex
Clifton City	Passaic	North Bergen Township	Hudson
East Orange City	Essex	Old Bridge Township	Middlesex
Elizabeth City	Union	Orange City Township	Essex
Garfield City	Bergen	Passaic City	Passaic
Guttenberg Town**	Hudson	Paterson City	Passaic
Hackensack City	Bergen	Perth Amboy City	Middlesex
Harrison Town	Hudson	Phillipsburg Town	Warren
Hillside Township	Union	Plainfield City	Union
Hoboken City	Hudson	Ridgefield Borough**	Bergen
Irvington Township	Essex	Roselle Borough	Union
Jersey City	Hudson	Union City	Hudson
Keansburg Borough	Monmouth	Weehawken Township	Hudson
Kearny Town	Hudson	West New York Town	Hudson
Lakewood Township	Ocean	Winslow Township	Camden
Lodi Borough	Bergen	Woodbridge Township	Middlesex

NEW JERSEY ECONOMIC DEVELOPMENT AUTHORITY GROW NJ ASSISTANCE PROGRAM

A business creating or retaining jobs and making a capital investment in a qualified incentive area can apply for grants of corporate business and insurance premiums tax credits for job creation/retention through the Grow NJ program. In order to qualify for consideration for Grow NJ, a company must locate the project in a Qualified Incentive Area, which is currently defined as one of the following: urban transit hub municipality, Garden State Growth Zones (GSGZ), projects classified as “Mega Projects”, **distressed municipality**, projects in a priority area, or other eligible areas not located within a distressed municipality or priority area.

ECONOMIC REDEVELOPMENT AND GROWTH (ERG) PROGRAM

The Economic Redevelopment and Growth (ERG) Program is an incentive for developers and businesses to address revenue gaps in development projects, defined as having insufficient revenues to support the project debt service under a standard financing scenario. It can also apply to projects that have a below market development margin or rate of return. Tax credits and grant funding are available to qualified residential and commercial projects.

www.njeda.com/web/Aspx_pg/Templates/Npic_Text.aspx?Doc_Id=1626&menuid=1529&topid=718&levelid=6&midid=1175

LIST OF MUNICIPALITIES MEETING EOA 2013 DEFINITION OF DISTRESSED MUNICIPALITY

Municipality	County	Municipality	County
Asbury Park City	Monmouth	Montclair TWP	Essex
Bayonne City	Hudson	Neptune City Boro	Monmouth
Belleville TWP	Essex	Neptune TWP	Monmouth
Bloomfield TWP	Essex	New Brunswick City	Middlesex
Brick TWP	Ocean	Newark City	Essex
Carteret Boro	Middlesex	North Bergen TWP	Hudson
City Of Orange TWP	Essex	Old Bridge TWP	Middlesex
Clifton City	Passaic	Passaic City	Passaic
East Orange City	Essex	Paterson City	Passaic
Elizabeth City	Union	New Brunswick City	Middlesex
Garfield City	Bergen	Perth Amboy City	Middlesex
Hackensack City	Bergen	Phillipsburg Town	Warren
Harrison Town	Hudson	Plainfield City	Union
Hillside TWP	Union	Lumsted TWP	Ocean
Hoboken City	Hudson	Rahway City	Union
Irvington TWP	Essex	Roselle Boro	Union
Jersey City	Hudson	Secaucus Town	Hudson
Keansburg Boro	Monmouth	Union City	Hudson
Kearny Town	Hudson	Weehawken TWP	Hudson
Lakewood TWP	Ocean	West New York Town	Hudson
Lodi Boro	Bergen	Woodbridge TWP	Middlesex
Long Branch City	Monmouth		