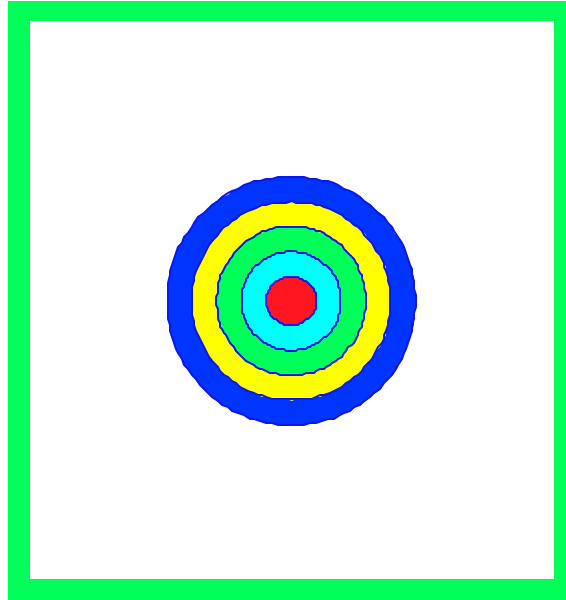


Marion County
Florida

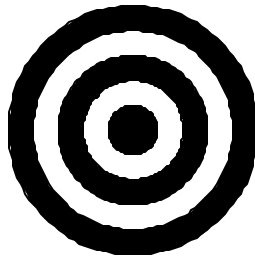


Economic Development
Target Industry Study



May – 2003

Economic Development Target Industry Study



Marion County, Florida

Prepared for the

**Ocala Marion County
Economic Development Corporation**

May - 2003

Prepared by

**William H. Fruth
POLICOM Corporation**

**2740 SW Martin Downs Blvd #279
Palm City, FL 34990
772-781-5559
www.policom.com**

Introduction

Communities around the country, which are concerned with the economic quality of life of their residents, have initiated economic development programs. A comprehensive economic development program includes three major activity areas:

- 1) Existing Industry Program, which retains and causes the expansion of existing contributory industries.
- 2) Recruitment Program designed to lure new contributory employers to the area.
- 3) Start-Up program which fosters the creation of new contributory business entities in the community.

All three programs are necessary for the long-term economic health of an area. However, varying degrees of weight or emphasis are placed upon each depending upon the condition and character of the local economy.

Communities, which have a large presence of existing companies and a strong economy, might place a greater emphasis on retention than recruitment. Distressed areas, those which lack diversity, or have a need to improve the quality of their economy, devote a greater portion of their time and resources toward recruitment. The success of a start-up program is usually dependent upon the quality of the first two programs and is a long-term venture for the community.

Ocala Marion County Economic Development Commission engaged POLICOM Corporation to create the following studies: 1) *Historical, Comparative Economic Analysis for Marion County*, 2) *Economic Development Goal Setting Study*, and this 3) *Economic Development Target Industry Study*.

The results of the *Historical, Comparative Economic Analysis* show the size of the Marion economy has grown at a rate much faster than the nation and the state. Its growth rate in size is comparable to the strongest metropolitan areas in the United States. The factored growth in population, total employment, and total earnings far exceeded a vast majority of the economies in the country. However, the growth has been susceptible to periodic recessions, enduring three major “negative” growth periods since 1973.

While the growth in the size of economy has been very brisk, the growth in the “quality” has been lackluster, over the last fifteen years. The annual earnings per worker (AEPW) for the county in 2000

(\$25,558) is ranked 302nd among the 318 metropolitan areas and has been on relative decline the last five years. As a percentage of the national average wage, it has declined each year since 1995.

The principal reason for the rapid growth in the size of the economy has been the result of in-migration of retirement age people and workers to service this industry.

After studying the results of the *Historical, Comparative Economic Analysis*, POLICOM created an *Economic Development Goal Setting Study*. The study included two major elements: 1) economic projections to the year 2023 based upon current and historic trends and 2) the job and wage growth necessary to increase the size and improve quality of the economy by the year 2023.

The projections provide for the county to continue to grow in size for at least the next ten years. This growth is the result of rapid population growth. Population growth will slow thereafter, causing the growth in the size of the economy also to decline.

However, since the growth of the economy will be based upon population growth, mainly the retirement industry, the quality of the economy will continue to gradually decline. (The retirement industry promulgates the formation of low-wage service and retail jobs.) As a result, the overall quality of the economy will decline to a level similar to what it was in 1978.

POLICOM created an economic goal for the county, which, if achieved, would raise and improve the quality of the economy over the next 20 years.

To reach the economic goal, annual milestones of net, new contributory jobs and their ancillary wage level were created. A contributory or primary job is one which imports money to the area. The wages paid in the primary industries determine the quality of the local economy and the standard of living for the people. The milestones are net gains and can be achieved by recruiting new companies to the county or as a result of the expansion of existing companies.

The following are those milestones:

Goal Setting Study

Annual Primary Jobs and Annual Earnings Per Worker (Wages)

<u>Year</u>	<u>New Primary Jobs</u>	<u>New Job Wage</u>	<u>Area Avg. Wage</u>	<u>% OF Area Avg.</u>
2003	653	30,936	26,501	117%
2004	691	33,323	27,353	122%
2005	714	34,921	28,245	124%
2006	738	36,595	29,208	125%
2007	763	38,349	30,207	127%
2008	742	40,131	31,285	128%
2009	717	41,849	32,447	129%
2010	739	43,545	33,654	129%
2011	762	45,307	34,908	130%
2012	785	47,135	36,210	130%
2013	772	49,390	37,487	132%
2014	756	51,536	38,732	133%
2015	778	53,082	40,021	133%
2016	799	54,673	41,358	132%
2017	821	56,310	42,742	132%
2018	844	57,994	44,177	131%
2019	838	59,995	45,633	131%
2020	885	61,749	47,111	131%
2021	910	62,917	48,640	129%
2022	937	64,103	50,222	128%
2023	964	65,308	51,860	126%

Marion County will significantly improve the quality and increase the size of its economy if the job-wage goal is achieved providing the jobs generated meet the following criteria:

- 1) The job is “primary or contributory” in nature. This simply means the source of the payroll must come from the sale of goods or services outside the Marion County economy. This imports money to the area, which then pushes the growth and consolidation of the reactive industries. Companies, which serve a “primary or contributory” function, can be classified in any of the industries.
- 2) The earnings per worker paid by the company must meet or exceed the goal, in order to prevent dilution and to elevate the quality of the economy.

To achieve the economic development goal, the community must recruit new, contributory businesses to the area, which will pay a wage equal to or higher than that set in the goal.

Why “target” industries?

A recruitment program is designed in a similar manner as a marketing-sales plan for almost any business. The process is very simple:

- Identify the product you have to sell (the community)
- Determine who wants to buy your product (what businesses will locate in the area)
- Market to those businesses

Marketing involves advertising, direct mail, cold calling, direct visitation, and a host of other means of contacting and “selling” the prospective client. The process and tools are very similar to selling any product.

As with any business enterprise, an economic development organization has limited time and financial resources with which to conduct a recruitment, marketing program.

With “unlimited” resources, the economic development group could purchase advertisements on every TV and radio station, and every newspaper and magazine. It could telephone and mail repeatedly and have sufficient staff to visit every business in the country. Of course, this is not the case for any economic development organization or any business in America.

Therefore, as with any business, the time and resources of the economic development organization must be directed to and focused upon those businesses which are most likely to purchase the product, in this case, locate to Marion County.

The more money the organization has the wider the range of companies it can approach. The less money, the narrower the target. Based on the amount of resources, the organization should market toward the industries and companies, in declining order of priority, which have the best potential to benefit the area and most likely to locate in the area.

This Target Industry Study provides a priority or target list of industries for Marion County to focus upon which will guide the use of marketing resources and which will best achieve the goal.

The community should not ignore or discourage businesses which desire to locate in the area if they do not pay a wage set by the goal or are not on the target list. The county needs to have as many contributory employers as possible. However, the company should pay at least 110% of the area average or its presence will cause a dilution in the quality of the economy.

Industrial Classifications and Database

The purpose of this Target Industry Study is to identify the business types which will most likely locate to Marion County which will be contributory in nature and pay a wage which will meet the annual milestones set by the goal. A recruitment program involves convincing or selling a company on the idea it should locate in a community.

Businesses which are expanding or relocating typically have a long list of “site selection” criteria which it uses to determine its choice and community for its location. The exact criteria differ from business to business. However, each is seeking the most “profitable location” and the selection criteria revolves around this goal.

For the company, deciding where to locate involves a complicated process of evaluating the “geo-economic” features of an area.

Geographic economics is the relationship or influence a physical location has on the profitability of a business. Site selection consultants can list hundreds of different criteria used for community and site evaluation. These can range from the cost of electricity to the number of workdays lost due to snowfall to simple property tax rates.

One of the most basic and important criteria is the availability and cost of trained or trainable labor. Another is the proximity to its market and relative transportation costs. Also, the “time” necessary to become operational (zoning approvals and necessary permits) in a community is becoming an important site selection issue.

For this Target Industry Study the plethora of criteria used for site selection will not be discussed in detail. However, basic site selection criteria have been considered to develop the target list.

To better understand how the businesses are chosen as “targets” in this study, it is important to review the nature of industrial data and how the government classifies industries.

Business activity in the United States is classified by its “industrial process” or the work activity of employees. Based upon what the workers actually do, concurrent with the service performed or product produced, each business is given an industrial classification.

In 1998, the United States, Mexico, and Canada adopted the North American Industrial Classification System, hereafter referred to “NAICS.” NAICS changed the classification codes of the Standard Industrial Classification (SIC) system developed in 1987. (The 1998 NAICS code was subsequently amended in 2002. The 2002 version is presently in use.) The first year for which data was collected under NAICS was 2001. All employment and earnings data prior to that year is still coded under SIC.

NAICS is a significant improvement over SIC as it includes more definitive descriptions of work activity than SIC. Additionally, it includes industrial activity which has been “invented” since 1987 such as many of the internet companies.

The system of classifying business activity is hierarchical in nature for both NAICS and SIC. First, the general activity of the business is determined, then, through a series of steps, the business is further defined and classified pinpointing more exactly its actual activity.

The following chart shows the path of coding under NAICS for a manufacturer of “air and gas compressors,” NAICS code 333912.

- 30-33 Manufacturing
- 333 Machinery Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 33391 Pump and Compressor Manufacturing
- 333911 Pump and Pumping Equipment Manufacturing
- 333912 **Air and Gas Compressor Manufacturing**
- 333913 Measuring and Dispensing Pump Manufacturing

First the general activity is identified at a 2 digit code, known as the Sector Level. Next, the activity is defined to the 3 digit code (Subsector). In this case, it is Machinery Manufacturing. The business is

further defined to the Industry Group (4 digit) and two levels of “Industry” (5 and 6 digits). At each point, the actual process of the business is identified in greater deal. ¹

Employment and earnings data for the nation is collected in various ways by the state and Federal governments. One of the principal sources of employment and earnings information is ES-202 or “covered workers” data. ES-202 data is generated from the monthly and quarterly filings by employers for workers covered by the national “unemployment compensation” program.

When an employer files its report, the employer provides the number of employees, the wages paid, and the 6 digit NAICS for their type of business. This information is then tabulated by NAICS, providing total employment and earnings by industrial classification. The unemployment compensation program covers approximately 85% of the private sector employment in the United States.

The Federal and state governments provide ES-202 data to researchers upon request. Each state has its own criteria for providing state and county data. The data includes total employment, earnings without any fringe benefits, number of business units, and earnings per worker by industrial classification. The total data for the nation includes employment and earnings data for each of the six digit NAICS industries. Data for states and counties is usually limited to the four digit level due to data suppression.

Data is suppressed or withheld by government agencies if, from the reported data, the wages paid by a private company can be determined. It is against the law for a government agency to publish or disclose the wages paid by a private company. The data is suppressed for the industry sectors in which it can be easily determined what a private company pays or its number of workers.

As an example, suppose in a county there is only one manufacturer of air and gas compressors (remember NAICS 333912) and the company dutifully reports the employment and wages paid. If the data is released for this industry sector, the wages paid by the employer can be easily determined. Therefore, the data is not published for this business type in this community. However, the employment and earnings are included in 33391 - Pump and Compressor Manufacturing if suppression is not necessary. If suppression is again necessary, then the data is carried upward to 3339 - Other General Purpose Machinery Manufacturing and so forth.

¹ The old Standard Industrial Classification System included a similar hierarchical system.

To determine the target industries for this study, ES-202 (covered workers) data was utilized as it provides information relative to the growth of jobs, earnings, and business units by industrial sector.

ES-202 data is different in its content than the database used to create *the Historical, Comparative Economic Analysis* and the *Economic Development Goal Setting Study*. The database used for these studies is from the Regional Economic Information System (REIS) published by the Bureau of Economic Analysis, U.S. Department of Commerce. REIS data for counties is extremely comprehensive as it includes all earnings, government transfers, and passive income for an area.

Total earnings include not only wages and salaries (ES-202 data), but also the profits of proprietors, director's salaries, bonuses, and employer contributions to private pension funds. However, REIS data is not published below the division level (1 digit SIC, 2 digit NAICS) for employment and the Subsector level (2 digit SIC, 3 digit NAICS) for earnings. As a result, the database is insufficient to determine industry composition for this study.

The number of jobs and associated annual earnings listed in the Goal conform to ES-202 data.

Due to the time necessary to collate data from employers, data is not available immediately. As of May of 2003, the most recent annualized data available for the USA, Florida and the counties reviewed for this study is for 2001.

Target Industries - Selection Process

The purpose of the study is to identify the industries or types of businesses upon which to concentrate the recruitment program, which will assist in reaching the Goal. The process of identifying the target industries is a combination of elimination and inclusion of business types.

The following are the steps taken by POLICOM to eliminate business types:

Beginning with the initial 1,495 private sector industrial classifications (NAICS 6 digit), business types were **deleted** from the list for the following reasons:

-
- 1) The industry is geographically restricted. These include the mining and farm divisions. An iron ore mining company cannot be attracted to an area without iron ore. A petroleum extraction company cannot locate in an area without oil beneath the ground.
 - 2) The industry must be located near or upon geographically restricted industries. These typically include the processing of raw materials from the mining or farm industries such as petroleum refinement, cotton mills, soy processing, and meatpacking.
 - 3) The industry must be located in immediate proximity to its market. An automobile assembly plant many times requires its parts suppliers to be located close enough to the facility to provide “just in time” or next day delivery of many of the components of the automobile. A manufacturer of petroleum drilling equipment needs to be located in areas where petroleum drilling occurs.
 - 4) The industry is inherently a consumptive, dependent industry. These include the most retail and construction divisions and most of the service, finance, insurance and real estate divisions. Only industries, which qualify as primary or contributory, are included on the target list. Businesses, which are dependent upon the community for their market, will form naturally.
 - 5) On average, the industry will not pay an annual wage, which will meet the level determined by the Goal (as adjusted for ES-202 data). The national average wage was adjusted upward or downward relative to the average for the state and the local area, compensating for local costs of living and market wages. After this adjustment, industries which would not pay a wage determined in the Goal were deleted.
 - 6) Industries which showed negative growth rates for the ten-year period from 1991 to 2000 in two of the following areas: earnings per worker, employment, number of business units, and total earnings were typically deleted. Business types, which have a current presence in Marion County or a major presence in Florida, however, were not deleted at this time.

Of the 1,495 sectors, approximately 1,134 industry sectors were eliminated by this process leaving approximately 361 business types. The remaining business types are 1) not geographically restricted, 2) are contributory in nature, 3) are growing nationally, and 4) pay a wage, which will meet the Goal.

Each of the remaining business types was reviewed individually for its respective geo-economic characteristics. Deleted from the list were business groups which required community assets which are not available in Marion County, are “niche industries” and too small to anticipate expansion, or require a unique workforce. Examples include those which require access to a seaport, a major air cargo facility, or a supply of “nuclear physicists” (specialty workers).

At this point the process of inclusion begins. As previously mentioned, each business entity has its own criteria for choosing a location based upon a number of factors including labor skill availability, local tax structure, transportation resources, raw materials, communications capability, and many more. Some industries cannot or will not locate in a state or a community if certain attributes are not present.

To determine which of the remaining business types will be on the target list, data was examined for Florida and the “Region” which includes Levy, Alachua, Sumter, and Volusia Counties.

The list of remaining business types was compared to each of the above areas to determine if the industry has a presence in any or all of them. If the industry has a presence in Florida, it can be assumed the state does not have significant geo-economic factors, which would prevent the industry from expanding to Marion County.

If the industry has a presence in the surrounding counties, it can be assumed these areas have the geo-economic assets desired by the industry, which might also be present in Marion County. If the industry is presently located in Marion County, it can be assumed, at the present time, the geo-economic assets exist in the county.

To determine which business types are to be included on the target list, a mathematical matrix was developed to score the impact and likelihood of the business locating in Marion County. The matrix created a “point” system, which took into consideration the following:

1. % EPW (earnings per worker) is above the Goal for Marion County.
2. Growth in EPW.
3. Growth in employment.
4. Growth in business units.
5. Growth in earnings.
6. Growth and presence in Florida.
7. Growth and presence in the area.

Since 2001 is the first year data has been published under NAICS, the historical growth pattern for each industrial sector was examined using SIC data at the four digit level, which is comparable to the 6 digit NAICS.

After the points were tabulated, the SIC codes were converted to comparable NAICS. However, the measure of the “presence” in the state and region utilized NAICS.

The industries (6 digit NAICS), which had the highest wages, highest growth rates, and the largest presence in the areas, received the highest score. Those, which had the slowest growth rates and the smallest presence, received the lowest score.

The target list includes those industrial sectors, which achieved a minimum score determined by POLICOM as worthy of targeting by Marion County economic development program.

Some industries with negative growth rates have been included, as it was determined Marion County has some of the assets they might need for relocation.

During this step in the process of choosing business targets it was discovered the “Region” (Levy, Sumter, Alachua, and Volusia Counties) **has a significant absence of contributory industries** which meet the wage level in the milestones. In fact, the average earnings per private sector worker in Marion County, while one of the lowest in the nation, is higher than Levy, Sumter or Volusia Counties. Alachua County, dominated by the University of Florida, has earnings per worker of \$25,668, a mere \$325 more than Marion County. As a result, the researcher did not gain any valuable information relative to the Region from this exercise, aside from the fact there are few high-wage contributory employers in the adjacent counties.

Community Liabilities - Assets

The final list of target industries was developed after a review of the basic assets and liabilities of the county. Specific geographic-economic assets and liabilities were not applied to each industrial sector on the target list. An example of a specific application is: “Are there sufficient trained welders available in the labor market to satisfy the need of a metal furniture manufacturer.”

Such an examination would have been extremely time consuming, expensive, and the results could vary month to month. However, several of the most important criteria were considered. Some of these include:

- Availability of trained or trainable workers.
- Skill level of existing workers.
- Transportation access.
- Educational resources.
- Market wages.

To determine the competitiveness of Marion County, the following is a brief review of some of the area's geo-economic liabilities and assets which influenced the choice of target industries.

Liabilities

Absence of a supply of trained, high-skill labor:

While a formal "workforce" study was not performed, there does not appear to be a large number of highly educated, high-skilled, trained workers available for immediate employment.

This is not an unusual situation for most communities, but due to the nature of the industries in Marion County, there likely is also a shortage of "under-employed" semi-skilled workers. An under-employed worker is one who is presently working at a job below his or her training or skill level.

In many areas in Florida, there are large numbers of individuals who have moved to an area as they want to live in the area. Typically they are young, single, well educated individuals who accept employment at a level below their training and patiently wait for high level employment opportunities. This usually occurs in rapidly growing coastal communities **which have a presence of high-wage employers**.

While the county has a large number of individuals employed in the manufacturing sector, most of them are engaged in "average to low-skill" activity (there are some exceptions). As a result, many of the "high-skilled" rapidly growing industries cannot be on the target list.

Absence of High Growth, High Wage Industries:

This poses a significant problem in recruiting these industries to the county.

Most of the fast growing industrial groups require a socio-geo-economic infrastructure in place in order for them to locate in an area. For some, it is the presence of a university conducting research in their particular discipline. For others, it is a presence of support and supplier companies. Still others, it is the presence of an experienced workforce possessing high-level skills relative to their specific, highly technical process. For these, and many other reasons, it is very difficult to recruit these groups to an area in which the industry is not already flourishing.

As a result, at the present time, many of the industry groups which would normally appear on a target industry list do not appear for Marion County.

Absence of a four-year campus university:

One of the reasons many of the new, rapidly growing industries are not present in the area is the absence of a four-year campus university. The University of Florida, however, is located to the north in Alachua County.

Even though the University of Florida is the state's largest, there have not been a significant number of new technology business formations in Alachua County. In many communities where major universities are located, such as Madison WI, Raleigh NC, and Austin TX, thousands of new technology jobs have been created and the employment has spilled into adjacent areas. The issue as to why this has not occurred in Gainesville will not be addressed here, but it certainly is an appropriate topic for study.

Absence of a large commercial airport within a 60 minute drive time:

Two types of businesses are affected by the presence of a large commercial airport: 1) those which depend on frequent air-cargo shipping and deliveries, and 2) corporate headquarters for executive travel. Typically, if a community is not within a 60 minute drive of a commercial airport, it is removed from most site selector's lists for these types of businesses. While the Orlando International Airport is

on the “cusp” of the 60 minute drive time, Orange, Lake and Sumter Counties are better positioned to attract industries which need this asset.

Long term shortage of available improved, approved real estate:

Economic development, the activity of recruiting or causing the expansion of primary industries an area, is ultimately a real estate transaction. In order to locate in an area, a company must have a facility in which to operate. Thusly, a company will lease or purchase an existing building or purchase land upon which to construct a facility, either for ownership or lease.

Communities which do not have an inventory of “ready-build” sites or vacant buildings are placed in a competitive disadvantage with communities which do.

“Ready-build” means all zoning approvals have been secured and the property has the necessary horizontal infrastructure in place to the site. Absent either of these the property is usually shunned by companies as the time necessary to secure approvals or construct the infrastructure can be exorbitant, especially in Florida.

Marion County presently has an inventory of improved industrial sites, but the supply is insufficient to meet the needs of the companies for the long term.

Assets

Relatively low wages: The overall level of earnings in Marion County is considerably lower than the national and state average. This gives the county a competitive advantage in the marketplace. Its biggest problem economically, low wage jobs, is also its biggest asset in competing for new company location. If the national average wage for a specific industry is \$45,000, a company, due to the local market wage, might have to pay \$55,000 in one area while \$35,000 in another.

Since the basis is lower in Marion County, a new business will be able to attract workers for less money than in other places in Florida. Even though they will pay less than other areas, the wage will likely be equal to or greater than that required by the goal.

Workforce: Even though there is not an abundance of unemployed skilled workers, there is a supply of semi-skilled workers who can be trained and will be willing to accept a new, higher paying position. There is also likely a large supply of part-time workers, who will fill the positions, on a full time basis, of those who take the new jobs.

There is a long history of production employment in Marion County. Presently, most of the manufacturers in the area pay a wage just short of that required in the goal. From an examination of the nature of the existing contributory businesses, there appears to be a large number of low to medium skilled workers who can be trained for a higher level of employment.

This is not to assume, however, the workforce stands ready to jump from the manufacturing of kitchen cabinets to semi-conductors or software. The skill level and educational attainment needed for the many of the highest paid, fastest growing industries in the United States requires more than a couple weeks or months at the local vocational training center. However, there are many growing industries identified in the target list that, with proper training for the workers, will be able to locate in the county. Over time, as the workforce becomes more sophisticated, other, more complicated industries will begin to consider the county as a location.

Geographic Location and Interstate Highway: One of the most important area assets is the presence of Interstate 75. Geographically almost equal distance from Tampa, Orlando, and Jacksonville, Marion County is ideally located for businesses which need to serve the northern half of the state.

Railroad access: The County has rail service.

General Recommendations

The following are some general recommendations which the area should address which will assist in attracting the Target Industries to Marion County.

1. Begin the process of developing at least 500 more usable acres of industrially zoned property. One of the most likely target industries is wholesale trade – distribution. The real estate needs of these businesses are usually twice that per employee for manufacturing. Communities which have real estate “ready to go” have a competitive advantage. The “500” acre number will still

likely be short over the 20 year term. More exact calculations of land needs and absorption can be done at another time. Do not rule out the possibility of a government owned industrial park. 75% of the counties in the United States have government owned industrial parks. If a private developer is not available to create these facilities (fewer and fewer are willing to take the long term risk), then it might be necessary for the community to develop the land needed for the future.

2. Be prepared to offer specific training, paid for by the community, for companies which are looking to locate to the area and existing companies looking to expand, especially if they meet the wage goal. The greatest asset and liability of the area is the skill level of the workforce. Having immediate, customized training programs available is an attractive feature for companies.
3. Development a relationship with the University of Florida. One of the possible reasons new companies have not evolved in Alachua County has been resistance by the community. It is quite possible there can be business formations in Marion County by letting entrepreneurs know the welcome mat is out in our area. Concurrent with this, the area should consider a “start-up” program, creating a facility in which newly born companies can locate to begin to develop products or services which are contributory in nature.

Additionally, the University can serve as an educational resource for a company which wants to locate in Marion County. By having a linkage with the University, some of the negatives relative to not having a University in your county can be overcome.

4. Be prepared to offer incentives to companies you are attempting to recruit. Most incentives should be limited to companies which will pay a wage determined in the Goal Study. Incentives should be used with caution but are commonplace in most parts of the country. Keep in mind, an incentive is typically a monetary “investment” which typically will throw off much more money than the initial cost.

Posted on POLICOM Corporation’s web site, www.policom.com, is a “Business Incentive Survey” which discusses the frequency and type of businesses offered on a local basis nationwide. From the survey, you can see what is being offered by other communities and which

incentives seem to be the most important to companies.

5. Expand the marketing and retention program of the economic development organization. There is a significant need for the area to improve the quality of the economy. If the area's economy continues to decline in quality, there will be significant socio-economic problems which the community will have to face, the cost of which will be much, much greater than investing in a well funded economic development program.

Target Industry List

It is assumed prior to or concurrent with the implementation of a recruitment program the basic economic development "tools" will be in place. Some of these include a supply of improved, approved land for construction, an inventory of existing buildings, and a process to accommodate the training, educational, cultural needs of the company.

Typical Company: Many times when a community initiates a marketing program to recruit new companies to the area it overestimates its potential success. Unfortunately, community leaders have dreams of attracting major, high profile companies, which will employ hundreds if not thousands of workers. They attempt to hit a "home run" when a series of singles will also achieve their purpose.

Nationally, there are annually only a handful of projects which will hire more than 1,000 workers and pay over \$40,000 in wages.

Most economic development recruitment is directed toward companies which will hire fewer than 100 workers. Additionally, most of the time, the community does not even recognize the company name as it is not a "national brand."

Smaller companies are more flexible in the site selection process and can use the assets offered in Marion County (lower costs) more than larger companies. **The typical company, which Marion County will recruit, will likely employ fewer than 75 people. However, the wholesale trade sector will offer opportunities for larger employers.**

The Appendix contains a description of each NAICS target.

This list of target industries on the following pages are clustered into general groups. The specific “**target**” is the five or six digit NAICS industry, which is **bold faced**. Provided for each target is the following which helps to explain why the industry has been included as a target:

1. 3 digit NAICS Subsector including the wages paid and the number of employees for 2001 for each area listed. Data is always provided for USA and Florida. It is also provided for Marion County and each adjacent county if the data has been disclosed. If there was no employment in Marion or the adjacent counties, no line is provided for them on the charts.
2. 4 digit NAICS Industry Group including wages paid and the number of employees for 2001 for each area if the data has been disclosed.
3. 5 or 6 digit NAICS Industry labeled “**Target.**” 2001 wages and number of jobs is provided for the USA.
4. Following the Target is relative SIC data. Provided is the following:
 - a. 3 digit SIC number and description. Caution, these number have no relationship to NAICS numbers.
 - b. The wages paid and number of jobs in 2000 for USA and Florida.
 - c. The average annual increase (AAI) for the number of jobs from 1996 -2000 for both the USA and Florida and from 1991-2000 (ten years) for the USA.
 - d. 4 digit SIC number and description. This code number is, for the most part, the conversion for the 5 or 6 digit NAICS. However, it is not a direct conversion and the industries will not show exactly comparable numbers. The wages paid, number of jobs, and the AAI from 1996-2000 and 1991-2000 for the USA is shown.

Presently, most industrial directories are still formatted under the SIC system for mailing and telephone lists. The four digit SIC shown will be the most appropriate number to use until the directories are converted to NAICS.

Wholesale Trade – Distribution

The most likely industry group to choose Marion County will be wholesale distributors which need to disperse their products to the northern half of the state. Since Florida will continue to grow in population, distribution will be a growth industry for many years.

The process of choosing a location for a distribution facility for the most part is determined by a “travel-time” study by the company. Its current and future markets are identified and a geographic pinpoint is placed on a map based upon how long it will take to deliver the product to the markets. At this juncture, the company contacts the counties closest to the pinpoint. Communities closest to the location, which have available land and an expedited permitting process, have a competitive edge. It is important Marion County be prepared to respond to these inquires.

Not all wholesale trade is contributory. There are many wholesalers which just serve the local marketplace. The wholesaling of durable good is more inherently contributory and also pays a higher wage than non-durable goods.

When reviewing the SIC data for each target, note the high job growth in the state of Florida.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	423	Merchant Wholesalers, Durable Goods	50,225	3,107,717		
Florida	423	Merchant Wholesalers, Durable Goods	46,873	172,706		
Marion	423	Merchant Wholesalers, Durable Goods	34,352	1,501		
Alachua	423	Merchant Wholesalers, Durable Goods	33,638	791		
Sumter	423	Merchant Wholesalers, Durable Goods	35,150	204		
Volusia	423	Merchant Wholesalers, Durable Goods	30,879	2,122		
USA	4232	Furniture and Home Furnishing	43,436	111,741		
Florida	4232	Furniture and Home Furnishing	36,653	4,345		
Marion	4232	Furniture and Home Furnishing	15,760	13		
Volusia	4232	Furniture and Home Furnishing	26,298	23		
Target	42321	Furniture	45,361	47,037		
Target	42322	Home Furnishing	42,037	64,704		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	502	Furniture and homefurnishings	43,117	175,851	3.6%	1.6%
FL	502	Furniture and homefurnishings	35,302	9,234	7.0%	
USA	5021	Furniture	45,002	85,540	4.6%	2.1%
USA	5023	Homefurnishings	41,332	90,311	2.7%	1.1%

Merchant Wholesalers

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	4233	Lumber and Other Construction Materials	41,617		219,175	
Florida	4233	Lumber and Other Construction Materials	37,767		11,927	
Marion	4233	Lumber and Other Construction Materials	27,080		122	
Alachua	4233	Lumber and Other Construction Materials	38,425		90	
Volusia	4233	Lumber and Other Construction Materials	34,364		175	
Target	42331	Lumber, Plywood, Millwork, and Wood Panel	41,731		123,386	
Target	42332	Brick, Stone, and Related Construction Material	41,835		45,949	
Target	42333	Roofing, Siding, and Insulation Material	42,866		28,952	
Target	42339	Other Construction Material	38,734		20,888	

Area	SIC	SIC Description	2000		AAI	
			Wages	Jobs	96-00	91-00
USA	503	Lumber and construction materials	40,632	290,770	3.8%	2.5%
FL	503	Lumber and construction materials	35,480	15,469	5.4%	
USA	5031	Lumber, plywood, and millwork	40,775	148,031	3.7%	2.3%
USA	5032	Brick, stone, and related materials	40,436	63,579	6.3%	4.9%
USA	5033	Roofing, siding, and insulation	42,046	40,470	4.6%	3.8%
USA	5039	Construction materials, nec	38,926	38,690	0.0%	-0.7%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	4234	Professional and Commercial Equipment and Supplies	68,337		690,225	
Florida	4234	Professional and Commercial Equipment and Supplies	59,545		42,173	
Marion	4234	Professional and Commercial Equipment and Supplies	27,685		83	
Alachua	4234	Professional and Commercial Equipment and Supplies	35,621		166	
Volusia	4234	Professional and Commercial Equipment and Supplies	36,104		490	
Target	42342	Office Equipment	50,140		128,815	
Target	42344	Other Commercial Equipment	41,503		51,049	
Target	42345	Medical, Dental, and Hospital Equipment and Supplies	60,285		151,164	
Target	42346	Ophthalmic Goods	41,500		20,606	
Target	42349	Other Professional Equipment and Supplies	58,666		27,029	

Area	SIC	SIC Description	2000		AAI	
			Wages	Jobs	96-00	91-00
USA	504	Professional and commercial equipment	67,030	946,978	3.6%	2.0%
FL	504	Professional and commercial equipment	53,216	51,711	4.2%	
USA	5044	Office equipment	46,509	197,034	1.3%	0.0%
USA	5046	Commercial equipment, nec	41,730	63,161	2.9%	2.0%
USA	5047	Medical and hospital equipment	57,094	198,713	2.9%	4.2%
USA	5048	Ophthalmic goods	40,625	23,973	2.1%	1.7%
USA	5049	Professional equipment, nec	55,195	36,825	0.5%	0.3%

Merchant Wholesalers

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	4234	Professional and Commercial Equipment and Supplies	68,337	690,225		
Florida	4234	Professional and Commercial Equipment and Supplies	59,545	42,173		
Marion	4234	Professional and Commercial Equipment and Supplies	27,685	83		
Alachua	4234	Professional and Commercial Equipment and Supplies	35,621	166		
Volusia	4234	Professional and Commercial Equipment and Supplies	36,104	490		
Target	42342	Office Equipment	50,140	128,815		
Target	42344	Other Commercial Equipment	41,503	51,049		
Target	42345	Medical, Dental, and Hospital Equipment and Supplies	60,285	151,164		
Target	42346	Ophthalmic Goods	41,500	20,606		
Target	42349	Other Professional Equipment and Supplies	58,666	27,029		

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00	AAI 91-00
USA	504	Professional and commercial equipment	67,030	946,978	3.6%	2.0%
FL	504	Professional and commercial equipment	53,216	51,711	4.2%	
USA	5044	Office equipment	46,509	197,034	1.3%	0.0%
USA	5046	Commercial equipment, nec	41,730	63,161	2.9%	2.0%
USA	5047	Medical and hospital equipment	57,094	198,713	2.9%	4.2%
USA	5048	Ophthalmic goods	40,625	23,973	2.1%	1.7%
USA	5049	Professional equipment, nec	55,195	36,825	0.5%	0.3%

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	4235	Metal and Mineral (except Petroleum)	45,721	133,119		
Florida	4235	Metal and Mineral (except Petroleum)	41,708	4,356		
Marion	4235	Metal and Mineral (except Petroleum)	22,071	22		
Volusia	4235	Metal and Mineral (except Petroleum)	37,180	38		
Target	42351	Metal Service Centers and Other Metal	45,344	130,840		

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00	AAI 91-00
USA	505	Metals and minerals, except petroleum	46,945	161,094	2.5%	1.3%
FL	505	Metals and minerals, except petroleum	39,157	5,223	8.9%	
USA	5051	Metals service centers and offices	46,332	157,379	2.7%	1.5%

Merchant Wholesalers

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	4236	Electrical and Electronic Goods	59,384		402,455	
Florida	4236	Electrical and Electronic Goods	53,882		27,014	
Marion	4236	Electrical and Electronic Goods	35,257		124	
Alachua	4236	Electrical and Electronic Goods	41,442		128	
Volusia	4236	Electrical and Electronic Goods	37,508		203	
Target	42361	Electrical Apparatus and Equipment, Wiring Supplies, & Equipment	50,206		156,273	
Target	42369	Other Electronic Parts and Equipment	67,377		215,202	

Area	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	506	Electrical goods	60,383	586,822	3.3%	1.8%
FL	506	Electrical goods	49,320	34,405	7.3%	
USA	5063	Electrical apparatus and equipment	49,018	234,381	2.2%	1.5%
USA	5065	Electronic parts and equipment	70,823	305,172	5.1%	3.0%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	4237	Hardware, and Plumbing and Heating Equipment and Supplies	43,586		237,528	
Florida	4237	Hardware, and Plumbing and Heating Equipment and Supplies	41,402		13,236	
Marion	4237	Hardware, and Plumbing and Heating Equipment and Supplies	35,860		219	
Alachua	4237	Hardware, and Plumbing and Heating Equipment and Supplies	29,787		59	
Sumter	4237	Hardware, and Plumbing and Heating Equipment and Supplies	20,733		15	
Volusia	4237	Hardware, and Plumbing and Heating Equipment and Supplies	34,343		105	
Target	42371	Hardware	40,624		83,224	
Target	42372	Plumbing and Heating Equipment and Supplies (Hydronics)	42,504		86,974	
Target	42373	Warm Air Heating and Air-Conditioning Equipment and Supplies	49,854		54,892	
Target	42374	Refrigeration Equipment and Supplies	43,319		12,438	

Area	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	507	Hardware, plumbing and heating equipment	42,409	319,923	2.2%	1.3%
FL	507	Hardware, plumbing and heating equipment	39,407	16,565	3.0%	
USA	5072	Hardware	39,594	115,357	2.7%	1.8%
USA	5074	Plumbing and hydronic heating supplies	41,364	124,425	1.6%	0.6%
USA	5075	Warm air heating and air-conditioning	49,052	65,337	2.4%	2.1%
USA	5078	Refrigeration equipment and supplies	43,812	14,805	2.0%	0.8%

Merchant Wholesalers

Area	NAICS	NAICS Description	Wages	Jobs		
			2001	2001		
USA	4238	Machinery, Equipment, and Supplies	44,931	698,260		
Florida	4238	Machinery, Equipment, and Supplies	43,094	33,347		
Marion	4238	Machinery, Equipment, and Supplies	39,702	461		
Alachua	4238	Machinery, Equipment, and Supplies	27,284	164		
Sumter	4238	Machinery, Equipment, and Supplies	55,609	26		
Levy	4238	Machinery, Equipment, and Supplies	15,860	31		
Volusia	4238	Machinery, Equipment, and Supplies	30,638	290		
Target	42383	Industrial Machinery and Equipment	48,977	338,831		
Target	42384	Industrial Supplies	44,021	69,142		

Area	SIC	SIC Description	2000	2000	AAI	AAI
			Wages	Jobs	96-00	91-00
USA	508	Machinery, equipment, and supplies	44,693	844,225	1.4%	0.6%
FL	508	Machinery, equipment, and supplies	40,337	36,837	3.3%	
USA	5084	Industrial machinery and equipment	49,870	351,513	1.8%	0.7%
USA	5085	Industrial supplies	45,256	147,336	-0.2%	0.1%

Area	NAICS	NAICS Description	Wages	Jobs		
			2001	2001		
USA	4239	Miscellaneous Durable Goods	37,885	270,103		
Florida	4239	Miscellaneous Durable Goods	38,367	16,980		
Marion	4239	Miscellaneous Durable Goods	33,601	246		
Alachua	4239	Miscellaneous Durable Goods	25,619	92		
Levy	4239	Miscellaneous Durable Goods	22,488	48		
Volusia	4239	Miscellaneous Durable Goods	35,375	294		
Target	42391	Sporting and Recreational Goods and Supplies	39,866	46,802		
Target	42392	Toy and Hobby Goods and Supplies	44,830	21,902		
Target	42399	Other Miscellaneous Durable Goods	41,888	57,649		

Area	SIC	SIC Description	2000	2000	AAI	AAI
			Wages	Jobs	96-00	91-00
USA	509	Miscellaneous durable goods	37,896	339,650	0.5%	1.4%
FL	509	Miscellaneous durable goods	34,871	19,768	5.6%	
USA	5091	Sporting and recreational goods	40,231	53,663	2.6%	2.3%
USA	5092	Toys and hobby goods and supplies	44,519	29,461	0.7%	1.6%
USA	5099	Durable goods, nec	41,150	83,793	1.3%	1.9%

Merchant Wholesalers

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2000	2000
USA	424	Merchant Wholesalers, Nondurable Goods	43,863	2,015,929		
Florida	424	Merchant Wholesalers, Nondurable Goods	42,923	110,493		
Marion	424	Merchant Wholesalers, Nondurable Goods	28,633	1,078		
Alachua	424	Merchant Wholesalers, Nondurable Goods	33,411	1,033		
Levy	424	Merchant Wholesalers, Nondurable Goods	17,961	132		
Volusia	424	Merchant Wholesalers, Nondurable Goods	31,030	1,737		
USA	4242	Drugs and Druggists' Sundries	68,646	201,228		
Florida	4242	Drugs and Druggists' Sundries	71,368	13,726		
Volusia	4242	Drugs and Druggists' Sundries	34,268	109		
Target	42421	Drugs and Druggists' Sundries	68,646	201,228		

Area	SIC	SIC Description	2000		AAI	
			Wages	Jobs	96-00	91-00
USA	512	Drugs, proprietaries, and sundries	65,040	261,717	5.7%	3.4%
FL	512	Drugs, proprietaries, and sundries	55,599	14,891	5.3%	
USA	5122	Drugs, proprietaries, and sundries	65,040	261,717	5.7%	3.4%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2000	2000
USA	4246	Chemical and Allied Products	55,418	133,856		
Florida	4246	Chemical and Allied Products	48,317	7,510		
Marion	4246	Chemical and Allied Products	28,216	167		
Volusia	4246	Chemical and Allied Products	31,896	141		
Target	42461	Plastics Materials and Basic Forms and Shapes	47,146	25,879		
Target	42469	Other Chemical and Allied Products	57,400	107,977		

Area	SIC	SIC Description	2000		AAI	
			Wages	Jobs	96-00	91-00
USA	516	Chemicals and allied products	56,645	162,257	1.8%	1.6%
FL	516	Chemicals and allied products	46,979	7,965	2.8%	
USA	5162	Plastics materials and basic shapes	52,043	32,997	2.3%	2.8%
USA	5169	Chemicals and allied products, nec	57,820	129,260	1.7%	1.4%

Truck Transportation

Marion County's location is also favorable for general distribution and trucking. More than 1,500 people are presently employed in this industry in the county.

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001		
USA	484	Truck Transportation	34,320	1,382,991		
Florida	484	Truck Transportation	31,785	46,945		
Marion	484	Truck Transportation	33,175	1,524		
Alachua	484	Truck Transportation	22,371	159		
Sumter	484	Truck Transportation	24,959	35		
Levy	484	Truck Transportation	25,795	63		
Volusia	484	Truck Transportation	31,869	763		
USA	48412	General Freight Trucking, Long-Distance	36,318	747,582		
Florida	48412	General Freight Trucking, Long-Distance	34,490	21,526		
Marion	48412	General Freight Trucking, Long-Distance	33,537	1,141		
Alachua	48412	General Freight Trucking, Long-Distance	34,082	43		
Sumter	48412	General Freight Trucking, Long-Distance	38,320	10		
Levy	48412	General Freight Trucking, Long-Distance	27,117	37		
Volusia	48412	General Freight Trucking, Long-Distance	33,311	488		
Target	48412	General Freight Trucking, Long-Distance	36,318	747,582		

	SIC	SIC Description	2000	2000	AAI	AAI
			Wages	Jobs	96-00	91-00
USA	421	Trucking and courier services, ex. air	32,984	1,625,506	-0.9%	1.0%
FL	421	Trucking and courier services, ex. air	31,127	59,235	-0.7%	
USA	4213	Trucking except local	35,510	917,047	2.1%	1.9%

Electronics

The county's workforce is ready to evolve to more complicated tasks. The "electronics" industry has enjoyed rapid growth over the last 15 years. It will continue to grow. However, many of the companies which began to manufacture electronic devices started in "high-wage, high-cost" areas such as California.

As a result of world-wide competition, these employers have had to find more profitable locations. Many of them have moved from California to less expensive states. Others have established facilities in other countries.

Due to the relatively low wage basis in Marion County and the experience of its workforce in production, the area can be very competitive in recruiting this industry, especially if training is available.

There are a large number of Targets in this sector. Marion County should be very competitive in all of them except 334413 – Semiconductors. However, this industry is also seeking less expensive locations and there might be an opportunity.

When reviewing the SIC information, note Florida had an average annual decline of 10% in employment of "Computer and Office Equipment" from 1996 to 2000. Normally this would be a "red flag" and an industry would not be included. However, since this industry will continue to grow nationally, Florida's loss is not a disqualification.

Electronics Manufacturing

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001
USA	334	Computer and Electronic Product Manufacturing	64,640	1,748,134
Florida	334	Computer and Electronic Product Manufacturing	53,244	64,678
Marion	334	Computer and Electronic Product Manufacturing	38,482	1,284
Alachua	334	Computer and Electronic Product Manufacturing	26,942	159
Volusia	334	Computer and Electronic Product Manufacturing	34,517	1,539
USA	3341	Computer and Peripheral Equipment Manufacturing	85,666	286,233
Florida	3341	Computer and Peripheral Equipment Manufacturing	57,398	3,531
Target	334111	Electronic Computer Manufacturing	95,051	157,639
Target	334112	Computer Storage Device Manufacturing	82,273	36,262
Target	334113	Computer Terminal Manufacturing	81,405	24,617
Target	334119	Other Computer Peripheral Equipment Manufacturing	67,186	67,714
USA	3342	Communications Equipment Manufacturing	64,801	236,908
Florida	3342	Communications Equipment Manufacturing	62,801	16,796
Target	33421	Telephone Apparatus Manufacturing Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	70,744	98,761
Target	33422	Equipment Manufacturing	61,244	105,084
Target	33429	Other Communications Equipment Manufacturing	58,355	33,064
USA	3344	Semiconductor and Other Electronic Component Manufacturing	59,225	643,352
Florida	3344	Semiconductor and Other Electronic Component Manufacturing	51,138	24,247
Volusia	3344	Semiconductor and Other Electronic Component Manufacturing	41,589	658
Target	334412	Bare Printed Circuit Board Manufacturing	38,677	120,923
Target	334413	Semiconductor and Related Device Manufacturing	78,817	292,145
Target	334414	Electronic Capacitor Manufacturing	35,036	14,386
Target	334417	Electronic Connector Manufacturing	39,546	23,452
Target	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	47,950	59,955
Target	334419	Other Electronic Component Manufacturing	47,130	89,502
USA	3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	61,334	471,717
Florida	3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	47,892	15,856
Alachua	3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	28,614	114
Target	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	52,287	67,175
Target	334515	Electrical Signals	70,242	65,745
Target	334516	Analytical Laboratory Instrument Manufacturing	64,698	35,197
Target	334517	Irradiation Apparatus Manufacturing	69,152	11,569
USA	3346	Manufacturing and Reproducing Magnetic and Optical Media	61,948	62,565
Florida	3346	Manufacturing and Reproducing Magnetic and Optical Media	49,887	2,153
Target	334611	Software Reproducing	89,568	27,859
Target	334613	Magnetic and Optical Recording Media Manufacturing	49,660	7,330

Electronics Manufacturing

			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	357	Computer and office equipment	104,796	357,246	0.5%	-2.0%
FL	357	Computer and office equipment	47,481	5,938	-10.8%	
USA	3571	Electronic computers	127,685	192,741	0.1%	-3.6%
USA	3572	Computer storage devices	98,965	41,240	0.5%	1.5%
USA	3575	Computer terminals	80,441	24,621	4.1%	1.7%
USA	3577	Computer peripheral equipment, nec	74,368	66,631	2.2%	1.6%
USA	366	Communications equipment	74,185	274,941	0.9%	0.5%
FL	366	Communications equipment	57,241	19,512	-1.4%	
USA	3661	Telephone and telegraph apparatus	82,107	124,198	2.1%	-0.1%
USA	3663	Radio and TV communications equipment	68,737	117,858	-0.8%	0.6%
USA	3669	Communications equipment, nec	63,792	32,886	3.6%	3.3%
USA	367	Electronic components and accessories	64,981	681,879	3.3%	1.7%
FL	367	Electronic components and accessories	42,153	21,472	-0.4%	
USA	3672	Printed circuit boards	40,925	140,331	3.8%	3.5%
USA	3674	Semiconductors and related devices	94,842	289,852	4.4%	2.0%
USA	3675	Electronic capacitors	38,808	19,963	-1.4%	-0.6%
USA	3678	Electronic connectors	39,705	23,974	6.9%	4.4%
USA	3577	Computer peripheral equipment, nec	74,368	66,631	2.2%	1.6%
USA	3679	Electronic components, nec	45,388	159,534	3.3%	1.2%
USA	382	Measuring and controlling devices	63,168	298,817	0.9%	-0.7%
FL	382	Measuring and controlling devices	38,615	5,844	2.7%	
USA	384	Medical instruments and supplies	51,492	283,688	1.5%	1.5%
FL	384	Medical instruments and supplies	39,696	15,090	2.4%	
USA	3845	Electromedical equipment	64,997	47,087	2.2%	4.9%
USA	3823	Process control instruments	55,624	70,936	2.1%	0.8%
USA	3825	Instruments to measure electricity	83,171	69,076	-0.3%	-2.6%
USA	3826	Analytical instruments	74,118	33,277	3.9%	1.0%
USA	3845	Electromedical equipment	64,997	47,087	2.2%	4.9%

Electronics Manufacturing

Area	NAICS	NAICS Description	Wages	Jobs				
			2001	2001	2000	2000	AAI	AAI
USA	335	Electrical Equipment, Appliance, and Component Manufacturing	40,390	552,013				
Florida	335	Electrical Equipment, Appliance, and Component Manufacturing	32,962	10,984				
Volusia	335	Electrical Equipment, Appliance, and Component Manufacturing	25,468	628				
USA	3353	Electrical Equipment Manufacturing	41,512	195,401				
Florida	3353	Electrical Equipment Manufacturing	36,680	3,661				
Target	335314	Relay and Industrial Control Manufacturing	47,185	52,958				
USA	3359	Other Electrical Equipment and Component Manufacturing	42,524	177,615				
Florida	3359	Other Electrical Equipment and Component Manufacturing	33,510	4,553				
Volusia	3359	Other Electrical Equipment and Component Manufacturing	25,494	620				
Target	33599	Miscellaneous Electrical Equipment and Component Manu	45,294	37,698				
			2000	2000	AAI	AAI		
	SIC	SIC Description	Wages	Jobs	96-00	91-00		
USA	362	Electrical industrial apparatus	42,633	148,850	-1.1%	-1.3%		
FL	362	Electrical industrial apparatus	38,301	2,589	2.2%			
USA	3625	Relays and industrial controls	52,209	55,144	-1.2%	-1.7%		
USA	3629	Electrical industrial apparatus, nec	41,755	13,908	7.7%	4.5%		

Drug and Health Care Manufacturing

The health care industry has been and will continue to be one of the fastest growing in the United States.

The manufacturing of drugs and health care related equipment should be strong for many years.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	3254	Pharmaceutical and Medicine Manufacturing	72,394	280,665		
Florida	3254	Pharmaceutical and Medicine Manufacturing	53,641	4,272		
Target	325411	Medicinal and Botanical Manufacturing	72,803	24,293		
Target	325412	Pharmaceutical Preparation Manufacturing	74,708	219,252		
Target	325413	In-Vitro Diagnostic Substance Manufacturing	57,163	13,233		
Target	325414	Biological Product (except Diagnostic) Manufacturing	59,175	23,887		

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00	AAI 91-00
USA	283	Drugs	87,129	311,852	3.8%	2.8%
FL	283	Drugs	57,415	3,922	6.0%	
USA	2833	Medicinals and botanicals	86,312	28,225	6.3%	4.5%
USA	2834	Pharmaceutical preparations	91,474	244,090	3.2%	2.1%
USA	2835	Diagnostic substances	63,375	17,057	3.7%	6.9%
USA	2836	Biological products exc. diagnostic	59,002	22,481	8.8%	5.8%

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	339	Miscellaneous Manufacturing	38,314	713,389		
Florida	339	Miscellaneous Manufacturing	35,761	31,174		
Marion	339	Miscellaneous Manufacturing	26,348	206		
Alachua	339	Miscellaneous Manufacturing	32,160	661		
Volusia	339	Miscellaneous Manufacturing	33,928	1,474		
USA	3391	Medical Equipment and Supplies Manufacturing	44,050	311,064		
Florida	3391	Medical Equipment and Supplies Manufacturing	39,490	19,541		
Marion	3391	Medical Equipment and Supplies Manufacturing	25,569	120		
Alachua	3391	Medical Equipment and Supplies Manufacturing	37,244	368		
Volusia	3391	Medical Equipment and Supplies Manufacturing	34,992	1,020		
Target	339111	Laboratory Apparatus and Furniture Manufacturing	44,889	15,901		
Target	339112	Surgical and Medical Instrument Manufacturing	51,373	107,039		
Target	339113	Surgical Appliance and Supplies Manufacturing	45,025	90,948		
Target	339114	Dental Equipment and Supplies Manufacturing	41,627	16,148		
Target	339999	All Other Miscellaneous Manufacturing	32,012	64,284		

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00	AAI 91-00
USA	382	Measuring and controlling devices	63,168	298,817	0.9%	-0.7%
FL	382	Measuring and controlling devices	38,615	5,844	2.7%	
USA	384	Medical instruments and supplies	51,492	283,688	1.5%	1.5%
FL	384	Medical instruments and supplies	39,696	15,090	2.4%	
USA	3821	Laboratory apparatus and furniture	42,483	10,509	1.8%	1.7%
USA	3841	Surgical and medical instruments	50,461	110,161	1.9%	1.2%
USA	3842	Surgical appliances and supplies	45,669	97,781	0.7%	0.5%
USA	3843	Dental equipment and supplies	40,756	15,744	2.6%	1.9%
USA	3842	Surgical appliances and supplies	45,669	97,781	0.7%	0.5%

General Manufacturing

Overall, manufacturing has declined in the United States for the last twenty years. However, there have been specific sectors which have expanded and are growing. Many of these can utilize the assets of Marion County. Specific NAICS targets have been chosen if they are growing or if they will likely locate to the county.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	332	Fabricated Metal Product Manufacturing	37,451	1,668,100		
Florida	332	Fabricated Metal Product Manufacturing	32,073	39,099		
Marion	332	Fabricated Metal Product Manufacturing	26,630	1,535		
Alachua	332	Fabricated Metal Product Manufacturing	44,181	430		
Levy	332	Fabricated Metal Product Manufacturing	29,908	131		
Volusia	332	Fabricated Metal Product Manufacturing	34,232	980		
USA	3323	Architectural and Structural Metals Manufacturing	35,530	418,173		
Florida	3323	Architectural and Structural Metals Manufacturing	30,342	17,058		
Marion	3323	Architectural and Structural Metals Manufacturing	25,932	288		
Alachua	3323	Architectural and Structural Metals Manufacturing	22,836	23		
Levy	3323	Architectural and Structural Metals Manufacturing	28,727	9		
Volusia	3323	Architectural and Structural Metals Manufacturing	32,098	244		
Target	332312	Fabricated Structural Metal Manufacturing	38,202	98,744		
Target	332321	Metal Window and Door Manufacturing	31,558	86,665		
Target	332322	Sheet Metal Work Manufacturing	35,503	106,775		
USA	3324	Boiler, Tank, and Shipping Container Manufacturing	41,802	102,577		
Florida	3324	Boiler, Tank, and Shipping Container Manufacturing	37,077	2,342		
Target	33242	Metal Tank (Heavy Gauge) Manufacturing	38,497	25,840		
Target	332439	Other Metal Container Manufacturing	33,411	28,573		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	344	Fabricated structural metal products	35,581	497,446	3.1%	1.6%
FL	344	Fabricated structural metal products	28,302	17,812	2.7%	
USA	3441	Fabricated structural metal	37,843	90,669	4.4%	1.5%
USA	3444	Sheet metalwork	35,512	129,528	3.4%	3.1%
USA	3444	Sheet metalwork	35,512	129,528	3.4%	3.1%

General Manufacturing

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	333	Machinery Manufacturing	45,277	1,360,793		
Florida	333	Machinery Manufacturing	39,804	29,305		
Marion	333	Machinery Manufacturing	35,490	625		
Alachua	333	Machinery Manufacturing	37,556	377		
Volusia	333	Machinery Manufacturing	34,947	1,157		
USA	3331	Agriculture, Construction, and Mining Machinery Manufacturing	44,666	215,655		
Florida	3331	Agriculture, Construction, and Mining Machinery Manufacturing	33,301	2,183		
Target	33312	Construction Machinery Manufacturing	47,496	71,829		
USA	3333	Commercial and Service Industry Machinery Manufacturing	51,216	139,365		
Florida	3333	Commercial and Service Industry Machinery Manufacturing	49,643	8,249		
Volusia	3333	Commercial and Service Industry Machinery Manufacturing	27,528	91		
Target	333311	Automatic Vending Machine Manufacturing	35,609	8,139		
Target	333313	Office Machinery Manufacturing	57,633	14,637		
Target	333314	Optical Instrument and Lens Manufacturing	67,132	27,491		
Target	333319	Other Commercial and Service Industry Machinery Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	42,865	62,526		
USA	3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	37,227	182,982		
Florida	3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	29,488	3,907		
Target	333411	Air Purification Equipment Manufacturing	35,560	19,251		
Target	333412	Industrial and Commercial Fan and Blower Manufacturing Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	37,076	13,972		
Target	333415	Industrial Refrigeration Equipment Manufacturing	37,546	127,211		
USA	3339	Other General Purpose Machinery Manufacturing	44,314	319,274		
Florida	3339	Other General Purpose Machinery Manufacturing	38,148	7,680		
Marion	3339	Other General Purpose Machinery Manufacturing	27,225	124		
Volusia	3339	Other General Purpose Machinery Manufacturing	39,339	655		
Target	333912	Air and Gas Compressor Manufacturing	47,913	23,733		
Target	333923	Overhead Traveling Crane, Hoist, and Monorail Systems	41,161	17,712		
Target	333993	Packaging Machinery Manufacturing	46,651	21,722		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	353	Construction and related machinery	44,979	238,305	1.6%	0.5%
FL	353	Construction and related machinery	36,455	3,607	6.4%	
USA	3531	Construction machinery	45,670	92,248	3.3%	0.8%
USA	358	Refrigeration and service machinery	38,240	212,304	1.0%	1.8%
FL	358	Refrigeration and service machinery	33,129	5,676	0.5%	
USA	359	Industrial machinery, nec	38,343	370,214	2.1%	1.6%
FL	359	Industrial machinery, nec	32,463	5,826	1.2%	
USA	382	Measuring and controlling devices	63,168	298,817	0.9%	-0.7%
FL	382	Measuring and controlling devices	38,615	5,844	2.7%	
USA	3578	Calculating and accounting equipment	58,625	10,559	1.4%	-0.5%
USA	3827	Optical instruments and lenses	82,498	27,382	8.7%	3.5%
USA	3589	Service industry machinery, nec	38,474	46,303	1.5%	2.4%
USA	3564	Blowers and fans	36,682	36,031	1.0%	1.2%
USA	3585	Refrigeration and heating equipment	38,521	148,773	1.4%	2.1%
USA	3565	Packaging machinery	46,972	24,321	2.2%	1.3%

General Manufacturing

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	336	Transportation Equipment Manufacturing	50,630		1,924,338	
Florida	336	Transportation Equipment Manufacturing	41,401		47,034	
Marion	336	Transportation Equipment Manufacturing	31,430		1,905	
Alachua	336	Transportation Equipment Manufacturing	29,521		700	
Levy	336	Transportation Equipment Manufacturing	19,997		15	
Volusia	336	Transportation Equipment Manufacturing	31,986		1,296	
USA	3364	Aerospace Product and Parts Manufacturing	60,435		506,002	
Florida	3364	Aerospace Product and Parts Manufacturing	53,853		21,088	
Volusia	3364	Aerospace Product and Parts Manufacturing	40,927		62	
Target	336413	Other Aircraft Part and Auxiliary Equipment Manufacturing	49,936		97,634	

	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	372	Aircraft and parts	57,363	463,063	0.8%	-4.0%
FL	372	Aircraft and parts	48,670	17,010	5.0%	
USA	3728	Aircraft parts and equipment, nec	49,788	129,954	3.2%	-2.7%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	3329	Other Fabricated Metal Product Manufacturing	40,715		320,961	
Florida	3329	Other Fabricated Metal Product Manufacturing	34,334		7,032	
Volusia	3329	Other Fabricated Metal Product Manufacturing	35,628		285	
Target	332911	Industrial Valve Manufacturing	44,094		25,201	
Target	332912	Fluid Power Valve and Hose Fitting Manufacturing	43,670		45,094	
Target	332990	All Other Miscellaneous Fabricated Metal Product Manufacturing	39,996		205,601	

	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	349	Misc. fabricated metal products	36,154	276,097	1.8%	1.6%
FL	349	Misc. fabricated metal products	31,978	6,445	2.5%	
USA	359	Industrial machinery, nec	38,343	370,214	2.1%	1.6%
FL	359	Industrial machinery, nec	32,463	5,826	1.2%	
USA	3491	Industrial valves	42,842	26,321	-0.1%	-0.4%
USA	3492	Fluid power valves and hose fittings	41,165	37,511	3.0%	2.9%
USA	3599	Industrial machinery, nec	36,966	295,692	2.6%	2.2%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	3328	Coating, Engraving, Heat Treating, and Allied Activities	33,282		164,410	
Florida	3328	Coating, Engraving, Heat Treating, and Allied Activities	31,278		1,935	
Marion	3328	Coating, Engraving, Heat Treating, and Allied Activities	23,872		6	
Volusia	3328	Coating, Engraving, Heat Treating, and Allied Activities	19,897		36	
Target	332813	Electroplating, Plating, Polishing, Anodizing and Coloring	32,293		91,107	

	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	359	Industrial machinery, nec	38,343	370,214	2.1%	1.6%
FL	359	Industrial machinery, nec	32,463	5,826	1.2%	
USA	3599	Industrial machinery, nec	36,966	295,692	2.6%	2.2%

General Manufacturing

Area	NAICS	NAICS Description	Wages		Jobs		AAI 96-00	AAI 91-00
			2001	2001	2001	2001		
USA	325	Chemical Manufacturing	60,580		954,204			
Florida	325	Chemical Manufacturing	49,490		21,410			
Marion	325	Chemical Manufacturing	33,120		145			
Alachua	325	Chemical Manufacturing	30,510		40			
Volusia	325	Chemical Manufacturing	30,329		731			
USA	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments	57,356		125,351			
Florida	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments	51,620		2,954			
Target	325211	Plastics Material and Resin Manufacturing	61,887		66,031			

Area	SIC	SIC Description	2000		AAI 96-00	AAI 91-00
			Wages	Jobs		
USA	282	Plastics materials and synthetics	59,265	151,337	-0.7%	-1.7%
FL	282	Plastics materials and synthetics	45,397	3,230	4.5%	
	2821	Plastics materials and resins	63,553	78,354	1.0%	-1.0%

Area	NAICS	NAICS Description	Wages		Jobs		AAI 96-00	AAI 91-00
			2001	2001	2001	2001		
USA	322	Paper Manufacturing	45,756		577,030			
Florida	322	Paper Manufacturing	45,386		11,495			
Marion	322	Paper Manufacturing	31,762		147			
USA	3222	Converted Paper Product Manufacturing	40,522		399,123			
Florida	3222	Converted Paper Product Manufacturing	40,093		8,218			
Target	322211	Corrugated and Solid Fiber Box Manufacturing	41,124		133,539			

Area	SIC	SIC Description	2000		AAI 96-00	AAI 91-00
			Wages	Jobs		
USA	265	Paperboard containers and boxes	40,076	217,812	-0.3%	0.3%
FL	265	Paperboard containers and boxes	36,489	4,274	-0.5%	
USA	2653	Corrugated and solid fiber boxes	40,636	135,089	0.6%	1.1%

Area	NAICS	NAICS Description	Wages		Jobs		AAI 96-00	AAI 91-00
			2001	2001	2001	2001		
Florida	326	Plastics and Rubber Products Manufacturing	30,851		16,586			
Marion	326	Plastics and Rubber Products Manufacturing	32,726		1,016			
Alachua	326	Plastics and Rubber Products Manufacturing	32,742		168			
Sumter	326	Plastics and Rubber Products Manufacturing	33,236		71			
Volusia	326	Plastics and Rubber Products Manufacturing	30,792		465			
USA	3261	Plastics Product Manufacturing	34,108		694,602			
Florida	3261	Plastics Product Manufacturing	30,546		13,285			
Volusia	3261	Plastics Product Manufacturing	31,771		393			
Target	32613	Laminated Plastics Plate, Sheet, and Shape Manufacturing	37,844		26,504			

Area	SIC	SIC Description	2000		AAI 96-00	AAI 91-00
			Wages	Jobs		
USA	308	Miscellaneous plastics products, nec	33,714	744,916	1.0%	1.7%
FL	308	Miscellaneous plastics products, nec	30,498	16,110	0.0%	
USA	399	Miscellaneous manufactures	32,723	175,199	3.0%	2.2%
FL	399	Miscellaneous manufactures	27,501	5,080	3.4%	
USA	3083	Laminated plastics plate and sheet	37,795	28,708	4.6%	3.6%

General Manufacturing

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	327	Nonmetallic Mineral Product Manufacturing	38,394	543,042		
Florida	327	Nonmetallic Mineral Product Manufacturing	34,176	23,685		
Marion	327	Nonmetallic Mineral Product Manufacturing	28,684	267		
Alachua	327	Nonmetallic Mineral Product Manufacturing	33,154	579		
Sumter	327	Nonmetallic Mineral Product Manufacturing	25,414	23		
Volusia	327	Nonmetallic Mineral Product Manufacturing	26,453	350		
USA	3274	Lime and Gypsum Product Manufacturing	43,750	19,752		
Florida	3274	Lime and Gypsum Product Manufacturing	45,445	1,400		
Target	32742	Gypsum Product Manufacturing	43,977	15,553		

Area	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	327	Concrete, gypsum, and plaster products	37,475	247,288	3.9%	1.9%
FL	327	Concrete, gypsum, and plaster products	33,983	17,587	4.7%	
USA	3275	Gypsum products	47,267	14,165	3.0%	0.7%

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2001	2001
USA	321	Wood Product Manufacturing	29,832	570,296		
Florida	321	Wood Product Manufacturing	28,893	16,813		
Marion	321	Wood Product Manufacturing	31,490	1,009		
Alachua	321	Wood Product Manufacturing	28,900	271		
Sumter	321	Wood Product Manufacturing	24,588	94		
Levy	321	Wood Product Manufacturing	20,947	56		
Volusia	321	Wood Product Manufacturing	27,289	169		
USA	3219	Other Wood Product Manufacturing	28,461	329,060		
Florida	3219	Other Wood Product Manufacturing	28,622	8,278		
Marion	3219	Other Wood Product Manufacturing	31,617	729		
Volusia	3219	Other Wood Product Manufacturing	30,200	119		
Target	321991	Manufactured Home (Mobile Home) Manufacturing	30,638	53,110		
Target	321992	Prefabricated Wood Building Manufacturing	30,835	24,557		

Area	SIC	SIC Description	2000		AAI	AAI
			Wages	Jobs	96-00	91-00
USA	245	Wood buildings and mobile homes	29,896	90,333	2.6%	4.6%
FL	245	Wood buildings and mobile homes	30,069	3,241	1.2%	
USA	2451	Mobile Homes	29,855	65,392	1.7%	5.4%
USA	2452	Prefabricated Wood Buildings and Components	30,004	24,941	5.5%	2.9%

General Manufacturing

Area	NAICS	NAICS Description	Wages		Jobs	
			2001	2001	2000	2000
USA	337	Furniture and Related Product Manufacturing	29,112	642,820		
Florida	337	Furniture and Related Product Manufacturing	26,722	20,724		
Marion	337	Furniture and Related Product Manufacturing	23,266	832		
Alachua	337	Furniture and Related Product Manufacturing	34,416	214		
Sumter	337	Furniture and Related Product Manufacturing	35,745	43		
Levy	337	Furniture and Related Product Manufacturing	0	0		
Volusia	337	Furniture and Related Product Manufacturing	21,849	305		
USA	3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	26,978	416,997		
Florida	3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	26,145	13,437		
Marion	3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	23,395	763		
Sumter	3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	35,745	43		
Volusia	3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	23,422	245		
Target	33711	Wood Kitchen Cabinet and Countertop Manufacturing	28,286	149,641		
Target	337127	Institutional Furniture Manufacturing	30,901	33,702		
USA	3372	Office Furniture (including Fixtures) Manufacturing	33,887	170,937		
Florida	3372	Office Furniture (including Fixtures) Manufacturing	29,296	3,523		
Target	337212	Custom Architectural Woodwork and Millwork Manufacturing	38,257	13,293		
Target	337214	Office Furniture (except Wood) Manufacturing	40,358	40,913		
Target	337215	Showcase, Partition, Shelving, and Locker Manufacturing	30,809	82,982		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	254	Partitions and fixtures	32,337	91,621	1.4%	1.6%
FL	254	Partitions and fixtures	29,203	2,052	3.0%	
USA	253	Public building and related furniture	37,115	53,676	4.8%	5.0%
FL	253	Public building and related furniture	31,721	682	na	
USA	2541	Wood Office and Store Fixtures, Partitions, Shelving, and Lockers	32,250	52,358	1.8%	2.0%
USA	2531	Public building and related furniture	37,115	53,676	4.8%	5.0%
USA	2541	Wood Office and Store Fixtures, Partitions, Shelving, and Lockers	32,250	52,358	1.8%	2.0%
USA	2542	Office and Store Fixtures, Partitions, Shelving, and Lockers, Except Wood	32,454	39,263	1.1%	1.1%
USA	252	Office furniture	37,222	78,118	4.5%	1.4%
FL	252	Office furniture	23,919	606	0.7%	
USA	2541	Wood Office and Store Fixtures, Partitions, Shelving, and	32,250	52,358	1.8%	2.0%
USA	2522	Office furniture, except wood	40,937	43,172	4.9%	2.4%
USA	2541	Wood Office and Store Fixtures, Partitions, Shelving, and Lockers	32,250	52,358	1.8%	2.0%
USA	2542	Office and Store Fixtures, Partitions, Shelving, and Lockers, Except Wood	32,454	39,263	1.1%	1.1%

Special Niches

54138 – Testing Laboratories and 54171 – Research & Development should not be confused with those operations which require a university presence or a high number of PhD types. These are typically free standing facilities which are not located near a headquarters or manufacturing site and do not require a large number of highly educated people. Many companies have remote testing and research facilities in which they conduct physical activity. These can be located in Marion County. Both industry groups will continue to grow in the future. 51821 – Data Processing should not be confused with software development. This is a “back-room” operation in which data is processed, such as subscription fulfillment.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	5413	Architectural, Engineering, and Related Services	55,928	1,268,354		
Florida	5413	Architectural, Engineering, and Related Services	45,526	69,324		
Marion	5413	Architectural, Engineering, and Related Services	30,674	328		
Alachua	5413	Architectural, Engineering, and Related Services	42,455	1,402		
Sumter	5413	Architectural, Engineering, and Related Services	66,685	19		
Levy	5413	Architectural, Engineering, and Related Services	22,581	35		
Volusia	5413	Architectural, Engineering, and Related Services	35,404	827		
Target	54138	Testing Laboratories	54,863	141,327		
USA	5417	Scientific Research and Development Services	67,934	530,832		
Florida	5417	Scientific Research and Development Services	60,311	11,944		
Marion	5417	Scientific Research and Development Services	38,299	47		
Alachua	5417	Scientific Research and Development Services	35,237	346		
Volusia	5417	Scientific Research and Development Services	24,490	225		
Target	54171	Research & Development - Physical, Engineering, & Life Sciences	70,962	461,282		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	873	Research and testing services	54,799	643,433	2.6%	1.5%
FL	873	Research and testing services	34,464	18,919	6.8%	
USA	8731	Commercial physical research	74,091	239,436	1.4%	0.4%
USA	8734	Testing laboratories	41,077	105,238	3.3%	3.5%
			2000	2000	AAI	AAI
	NAICS	NAICS Description	Wages	Jobs		
USA	5182	Data Processing, Hosting, and Related Services	55,648	315,397		
Florida	5182	Data Processing, Hosting, and Related Services	54,023	17,035		
Alachua	5182	Data Processing, Hosting, and Related Services	22,552	7		
Volusia	5182	Data Processing, Hosting, and Related Services	25,019	115		
Target	51821	Data Processing, Hosting, and Related Services	55,648	315,397		
			2000	2000	AAI	AAI
	SIC	SIC Description	Wages	Jobs	96-00	91-00
USA	737	Computer and data processing services	78,888	2,148,295	14.7%	10.8%
FL	737	Computer and data processing services	60,638	71,198	13.5%	
USA	7374	Data processing and preparation	53,392	279,063	4.5%	3.4%

Insurance Carriers

This industry is included on the target list since it has grown and will continue to grow over the years. While all sectors are enduring a “shake-out” as a result of 9/11, decline of the stock market, and other events, it will recover. There is a high presence of this industry in Alachua County and a small presence in Marion County. It is anticipated the type of facility which could locate in Marion County would be involved in the processing of policies and claims, and not a headquarters or “actuary” facility.

Area	NAICS	NAICS Description	Wages 2001	Jobs 2001		
USA	5241	Insurance Carriers	53,252	1,304,430		
Florida	5241	Insurance Carriers	45,108	68,757		
Marion	5241	Insurance Carriers	44,905	258		
Alachua	5241	Insurance Carriers	37,139	2,175		
Volusia	5241	Insurance Carriers	39,242	336		
Target	524113	Direct Life Insurance Carriers	58,510	350,949		
Target	524114	Direct Health and Medical Insurance Carriers	47,860	338,481		
Target	524114	Direct Health and Medical Insurance Carriers	47,860	338,481		
Target	524126	Direct Property and Casualty Insurance Carriers	52,520	498,744		
Target	524127	Direct Title Insurance Carriers	48,563	77,556		
Target	524128	Other Direct Insurance (except Life, Health, and Medical) Carriers	47,291	9,619		

	SIC	SIC Description	2000 Wages	2000 Jobs	AAI 96-00	AAI 91-00
USA	632	Medical service and health insurance	45,945	379,297	4.5%	4.7%
FL	632	Medical service and health insurance	40,496	17,430	7.9%	
USA	635	Surety insurance	70,682	23,618	5.6%	5.6%
FL	635	Surety insurance	66,138	697	12.2%	
USA	639	Insurance carriers, nec	44,869	6,460	20.2%	14.8%
FL	639	Insurance carriers, nec	38,672	391	47.2%	

Appendix

The following is a brief description of the each Target by the six digit NAICS code.

They are presented in numeric order.

The descriptions have been created by the Office of Management and Budget in cooperation with the United States Department of Labor.

321 Wood Product Manufacturing

Industries in the Wood Product Manufacturing subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile home), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planing, shaping, laminating, and assembling of wood products starting from logs that are cut into bolts, or lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and bolts that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills and wood preservation establishments, the establishments are grouped into industries mainly based on the specific products manufactured.

321991 Manufactured Home (Mobile Home) Manufacturing

This U.S. industry comprises establishments primarily engaged in making manufactured homes (i.e., mobile homes) and nonresidential mobile buildings. Manufactured homes are designed to accept permanent water, sewer, and utility connections and although equipped with wheels, they are not intended for regular highway movement.

321992 Prefabricated Wood Building Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing prefabricated wood buildings and wood sections and panels for prefabricated wood buildings.

322211 Corrugated and Solid Fiber Box Manufacturing

This U.S. industry comprises establishments primarily engaged in laminating purchased paper or paperboard into corrugated or solid fiber boxes and related products, such as pads, partitions, pallets, and corrugated paper without manufacturing paperboard. These boxes are generally used for shipping.

325 Chemical Manufacturing

The Chemical Manufacturing subsector is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products. This subsector distinguishes the production of basic chemicals that comprise the first industry group from the production of intermediate and end products produced by further processing of basic chemicals that make up the remaining industry groups. This subsector does not include all industries transforming raw materials by a chemical process. It is common for some chemical processing to occur during mining operations. These beneficiating operations, such as copper concentrating, are classified in Sector 21, Mining. Furthermore, the refining of crude petroleum is included in Subsector 324, Petroleum and Coal Products Manufacturing. In addition, the manufacturing of aluminum oxide is included in Subsector 331, Primary Metal Manufacturing; and beverage distilleries are classified in Subsector 312, Beverage and Tobacco Product Manufacturing. As in the case of these two activities, the grouping of industries into subsectors may take into account the association of the activities performed with other activities in the subsector.

325211 Plastics Material and Resin Manufacturing

This U.S. industry comprises establishments primarily engaged in (1) manufacturing resins, plastics materials, and nonvulcanizable thermoplastic elastomers and mixing and blending resins on a custom basis and/or (2) manufacturing noncustomized synthetic resins.

325320 Pesticide and Other Agricultural Chemical Manufacturing

This industry comprises establishments primarily engaged in the formulation and preparation of agricultural and household pest control chemicals (except fertilizers).

325411 Medicinal and Botanical Manufacturing

This U.S. industry comprises establishments primarily engaged in (1) manufacturing uncompounded medicinal chemicals and their derivatives (i.e., generally for use by pharmaceutical preparation manufacturers) and/or (2) grading, grinding, and milling uncompounded botanicals.

325412 Pharmaceutical Preparation Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing in-vivo diagnostic substances and pharmaceutical preparations (except biological) intended for internal and external consumption in dose forms, such as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

325413 In-Vitro Diagnostic Substance Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing in-vitro (i.e., not taken internally) diagnostic substances, such as chemical, biological, or radioactive substances. The substances are used for diagnostic tests that are performed in test tubes, petri dishes, machines, and other diagnostic test-type devices.

325414 Biological Product (except Diagnostic) Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except diagnostic).

326130 Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing

This industry comprises establishments primarily engaged in laminating plastics profile shapes such as plate, sheet (except packaging), and rod. The lamination process generally involves bonding or impregnating profiles with plastics resins and compressing them under heat.

327420 Gypsum Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing gypsum products such as wallboard, plaster, plasterboard, molding, ornamental moldings, statuary, and architectural plaster work. Gypsum product manufacturing establishments may mine, quarry, or purchase gypsum.

332 Fabricated Metal Product Manufacturing

Industries in the Fabricated Metal Product Manufacturing subsector transform metal into intermediate or end products, other than machinery, computers and electronics, and metal furniture or treating metals and metal formed products fabricated elsewhere. Important fabricated metal processes are forging, stamping, bending, forming, and machining, used to shape individual pieces of metal; and other processes, such as welding and assembling, used to join separate parts together. Establishments in this subsector may use one of these processes or a combination of these processes. The NAICS structure for this subsector distinguishes the forging and stamping processes in a single industry. The remaining industries, in the subsector, group establishments based on similar combinations of processes used to make products. The manufacturing performed in the Fabricated Metal Product Manufacturing subsector begins with manufactured metal shapes. The establishments in this sector further fabricate the purchased metal shapes into a product. For instance, the Spring and Wire Product Manufacturing industry starts with wire and fabricates such items. Within manufacturing there are other establishments that make the same products made by this subsector; only these establishments begin production further back in the production process. These establishments have a more integrated operation. For instance, one establishment may manufacture steel, draw it into wire, and make wire products in the same establishment. Such operations are classified in the Primary Metal Manufacturing subsector.

332312 Fabricated Structural Metal Manufacturing

This U.S. industry comprises establishments primarily engaged in fabricating structural metal products, such as concrete reinforcing bars and fabricated bar joists.

332321 Metal Window and Door Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing metal framed windows (i.e., typically using purchased glass) and metal doors. Examples of products made by these establishments are metal door frames; metal framed window and door screens; and metal molding and trim (except automotive).

332322 Sheet Metal Work Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing sheet metal work (except stampings).

332420 Metal Tank (Heavy Gauge) Manufacturing

This industry comprises establishments primarily engaged in cutting, forming, and joining heavy gauge metal to manufacture tanks, vessels, and other containers.

332439 Other Metal Container Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing metal (light gauge) containers (except cans).

332813 Electroplating, Plating, Polishing, Anodizing, and Coloring

This U.S. industry comprises establishments primarily engaged in electroplating, plating, anodizing, coloring, buffing, polishing, cleaning, and sandblasting metals and metal products for the trade.

332911 Industrial Valve Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing industrial valves and valves for water works and municipal water systems.

332912 Fluid Power Valve and Hose Fitting Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing fluid power valves and hose fittings.

33299 All Other Fabricated Metal Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing fabricated metal products (except forgings and stampings, cutlery and hand tools, architectural and structural metal products, boilers, tanks, shipping containers, hardware, spring and wire products, machine shop products, turned products, screws, nuts and bolts, and metal valves).

333 Machinery Manufacturing

Industries in the Machinery Manufacturing subsector create end products that apply mechanical force, for example, the application of gears and levers, to perform work. Some important processes for the manufacture of machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal. Processes, such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. Moreover, complex assembly operations are an inherent part of the production process. In general, design considerations are very important in machinery production. Establishments specialize in making machinery designed for particular applications. Thus, design is considered to be part of the production process for the purpose of implementing NAICS. The NAICS structure reflects this by defining industries and industry groups that make machinery for different applications. A broad distinction exists between machinery that is generally used in a variety of industrial applications (i.e., general purpose machinery) and machinery that is designed to be used in a particular industry (i.e., special purpose machinery). Three industry groups consist of special purpose machinery—Agricultural, Construction, and Mining Machinery Manufacturing; Industrial Machinery Manufacturing; and Commercial and Service Industry Machinery Manufacturing. The other industry groups make general-purpose machinery: Ventilation, Heating, Air Conditioning, and Commercial Refrigeration Equipment Manufacturing; Metalworking Machinery Manufacturing; Engine, Turbine, and Power Transmission Equipment Manufacturing; and Other General Purpose Machinery Manufacturing.

333120 Construction Machinery Manufacturing

This industry comprises establishments primarily engaged in manufacturing construction machinery, surface mining machinery, and logging equipment.

333311 Automatic Vending Machine Manufacturing

This U.S. industry comprises establishments primarily engaged in (1) manufacturing coin, token, currency or magnetic card operated vending machines and/or (2) manufacturing coin operated mechanism for machines, such as vending machines, lockers, and laundry machines. This U.S. industry comprises establishments primarily engaged in manufacturing office machinery (except computers and photocopying equipment), such as mail-handling machinery and equipment, calculators, typewriters, and dedicated word processing equipment.

333314 Optical Instrument and Lens Manufacturing

This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing optical instruments and lens, such as binoculars, microscopes (except electron, proton), telescopes, prisms, and lenses (except ophthalmic); (2) coating or polishing lenses (except ophthalmic); and (3) mounting lenses (except ophthalmic).

333319 Other Commercial and Service Industry Machinery Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing commercial and service industry equipment (except automatic vending machines, commercial laundry, dry-cleaning and pressing machines, office machinery, optical instruments and lenses, and photographic and photocopying equipment).

333411 Air Purification Equipment Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing stationary air purification equipment, such as industrial dust and fume collection equipment, electrostatic precipitation equipment, warm air furnace filters, air washers, and other dust collection equipment.

333412 Industrial and Commercial Fan and Blower Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing attic fans and industrial and commercial fans and blowers, such as commercial exhaust fans and commercial ventilating fans.

333415 Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing

This U.S. industry comprises establishments primarily engaged in (1) manufacturing air-conditioning (except motor vehicle) and warm air furnace equipment and/or (2) manufacturing commercial and industrial refrigeration and freezer equipment.

333912 Air and Gas Compressor Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing general purpose air and gas compressors, such as reciprocating compressors, centrifugal compressors, vacuum pumps (except laboratory), and nonagricultural spraying and dusting compressors and spray gun units.

333923 Overhead Traveling Crane, Hoist, and Monorail System Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing overhead traveling cranes, hoists, and monorail systems.

333993 Packaging Machinery Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing packaging machinery, such as wrapping, bottling, canning, and labeling machinery.

334 Computer and Electronic Product Manufacturing

Industries in the Computer and Electronic Product Manufacturing subsector group establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products, and establishments that manufacture components for such products. The Computer and Electronic Product Manufacturing industries have been combined in the hierarchy of NAICS because of the economic significance they have attained. Their rapid growth suggests that they will become even more important to the economies of all three North American countries in the future, and in addition their manufacturing processes are fundamentally different from the manufacturing processes of other machinery

and equipment. The design and use of integrated circuits and the application of highly specialized miniaturization technologies are common elements in the production technologies of the computer and electronic subsector. Convergence of technology motivates this NAICS subsector. Digitalization of sound recording, for example, causes both the medium (the compact disc) and the equipment to resemble the technologies for recording, storing, transmitting, and manipulating data. Communications technology and equipment have been converging with computer technology. When technologically-related components are in the same sector, it makes it easier to adjust the classification for future changes, without needing to redefine its basic structure. The creation of the Computer and Electronic Product Manufacturing subsector will assist in delineating new and emerging industries because the activities that will serve as the probable sources of new industries, such as computer manufacturing and communications equipment manufacturing, or computers and audio equipment, are brought together. As new activities emerge, they are less likely therefore, to cross the subsector boundaries of the classification.

334111 Electronic Computer Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing and/or assembling electronic computers, such as mainframes, personal computers, workstations, laptops, and computer servers. Computers can be analog, digital, or hybrid. Digital computers, the most common type, are devices that do all of the following: (1) store the processing program or programs and the data immediately necessary for the execution of the program; (2) can be freely programmed in accordance with the requirements of the user; (3) perform arithmetical computations specified by the user; and (4) execute, without human intervention, a processing program that requires the computer to modify its execution by logical decision during the processing run. Analog computers are capable of simulating mathematical models and contain at least analog, control, and programming elements. The manufacture of computers includes the assembly or integration of processors, coprocessors, memory, storage, and input/output devices into a user-programmable final product.

334112 Computer Storage Device Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer storage devices that allow the storage and retrieval of data from a phase change, magnetic, optical, or magnetic/optical media. Examples of products made by these establishments are CD-ROM drives, floppy disk drives, hard disk drives, and tape storage and backup units.

334113 Computer Terminal Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer terminals. Computer terminals are input/output devices that connect with a central computer for processing.

334119 Other Computer Peripheral Equipment Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing computer peripheral equipment (except storage devices and computer terminals).

334210 Telephone Apparatus Manufacturing

This industry comprises establishments primarily engaged in manufacturing wire telephone and data communications equipment. These products may be standalone or board-level components of a larger system. Examples of products made by these establishments are central office switching equipment, cordless telephones (except cellular), PBX equipment, telephones, telephone answering machines, LAN modems, multi-user modems, and other data communications equipment, such as bridges, routers, and gateways.

334220 Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing

This industry comprises establishments primarily engaged in manufacturing radio and television broadcast and wireless communications equipment. Examples of products made by these establishments are: transmitting and receiving antennas, cable television equipment, GPS equipment, pagers, cellular phones, mobile communications equipment, and radio and television studio and broadcasting equipment.

334290 Other Communications Equipment Manufacturing

This industry comprises establishments primarily engaged in manufacturing communications equipment (except telephone apparatus, and radio and television broadcast, and wireless communications equipment).

334412 Bare Printed Circuit Board Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing bare (i.e., rigid or flexible) printed circuit boards without mounted electronic components. These establishments print, perforate, plate, screen, etch, or photoprint interconnecting pathways for electric current on laminates.

334413 Semiconductor and Related Device Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing semiconductors and related solid state devices. Examples of products made by these establishments are integrated circuits, memory chips, microprocessors, diodes, transistors, solar cells and other optoelectronic devices.

334414 Electronic Capacitor Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electronic fixed and variable capacitors and condensers.

334417 Electronic Connector Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electronic connectors, such as coaxial, cylindrical, rack and panel, pin and sleeve, printed circuit and fiber optic.

334418 Printed Circuit Assembly (Electronic Assembly) Manufacturing

This U.S. industry comprises establishments primarily engaged in loading components onto printed circuit boards or who manufacture and ship loaded printed circuit boards. Also known as printed circuit assemblies, electronics assemblies, or modules, these products are printed circuit boards that have some or all of the semiconductor and electronic components inserted or mounted and are inputs to a wide variety of electronic systems and devices.

334419 Other Electronic Component Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electronic components (except electron tubes; bare printed circuit boards; semiconductors and related devices; electronic capacitors; electronic resistors; coils, transformers and other inductors; connectors; and loaded printed circuit boards).

334510 Electromedical and Electrotherapeutic Apparatus Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electromedical and electrotherapeutic apparatus, such as magnetic resonance imaging equipment, medical ultrasound equipment, pacemakers, hearing aids, electrocardiographs, and electromedical endoscopic equipment.

334513 Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables

This U.S. industry comprises establishments primarily engaged in manufacturing instruments and related devices for measuring, displaying, indicating, recording, transmitting, and controlling industrial process variables. These instruments measure, display or control (monitor, analyze, and so forth) industrial process variables, such as temperature, humidity, pressure, vacuum, combustion, flow, level, viscosity, density, acidity, concentration, and rotation.

334515 Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals

This U.S. industry comprises establishments primarily engaged in manufacturing instruments for measuring and testing the characteristics of electricity and electrical signals. Examples of products made by these establishments are circuit and continuity testers, volt meters, ohm meters, watt meters, multimeters, and semiconductor test equipment.

334516 Analytical Laboratory Instrument Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing instruments and instrumentation systems for laboratory analysis of the chemical or physical composition or concentration of samples of solid, fluid, gaseous, or composite material.

334517 Irradiation Apparatus Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing irradiation apparatus and tubes for applications, such as medical diagnostic, medical therapeutic, industrial, research and scientific evaluation. Irradiation can take the form of beta-rays, gamma-rays, X-rays, or other ionizing radiation.

334611 Software Reproducing

This U.S. industry comprises establishments primarily engaged in mass reproducing computer software. These establishments do not generally develop any software, they mass reproduce data and programs on magnetic media, such as diskettes, tapes, or cartridges. Establishments in this industry mass reproduce products, such as CD-ROMs and game cartridges.

334613 Magnetic and Optical Recording Media Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing magnetic and optical recording media, such as blank magnetic tape, blank diskettes, blank optical discs, hard drive media, and blank magnetic tape cassettes.

335 Electrical Equipment, Appliance, and Component Manufacturing

Industries in the Electrical Equipment, Appliance, and Component Manufacturing subsector manufacture products that generate, distribute and use electrical power. Electric Lighting Equipment Manufacturing establishments produce electric lamp bulbs, lighting fixtures, and parts. Household Appliance Manufacturing establishments make both small and major electrical appliances and parts. Electrical Equipment Manufacturing establishments make goods, such as electric motors, generators, transformers, and switchgear apparatus. Other Electrical Equipment and Component Manufacturing establishments make devices for storing electrical power (e.g., batteries), for transmitting electricity (e.g., insulated wire), and wiring devices (e.g., electrical outlets, fuse boxes, and light switches).

335314 Relay and Industrial Control Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing relays, motor starters and controllers, and other industrial controls and control accessories.

33599 All Other Electrical Equipment and Component Manufacturing

This industry comprises establishments primarily engaged in manufacturing electrical equipment (except electric lighting equipment, household-type appliances, transformers, motors, generators, switchgear, relays, industrial controls, batteries, communication and energy wire and cable, and wiring devices).

336413 Other Aircraft Parts and Auxiliary Equipment Manufacturing

This U.S. industry comprises establishment primarily engaged in (1) manufacturing aircraft parts or auxiliary equipment (except engines and aircraft fluid power subassemblies) and/or (2) developing and making prototypes of aircraft parts and auxiliary equipment. Auxiliary equipment includes such items as crop dusting apparatus, armament racks, in-flight refueling equipment, and external fuel tanks.

337 Furniture and Related Product Manufacturing

Industries in the Furniture and Related Product Manufacturing subsector make furniture and related articles, such as mattresses, window blinds, cabinets, and fixtures. The processes used in the manufacture of furniture include the cutting, bending, molding, laminating, and assembly of such materials as wood, metal, glass, plastics, and rattan. However, the production process for furniture is not solely bending metal, cutting and shaping wood, or extruding and molding plastics. Design and fashion trends play an important part in the production of furniture. The integrated design of the article for both esthetic and functional qualities is also a major part of the process of manufacturing furniture. Design services may be performed by the furniture establishment's work force or may be purchased from industrial designers. Furniture may be made of any material, but the most common ones used in North America are metal and wood. Furniture manufacturing establishments may specialize in making articles primarily from one material. Some of the equipment required to make a wooden table, for example, is different from that used to make a metal one. However, furniture is usually made from several materials. A wooden table might have metal brackets, and a wooden chair a fabric or plastics seat. Therefore, in NAICS,

furniture initially is classified based on the type of furniture (application for which it is designed) rather than the material used. For example, an upholstered sofa is treated as household furniture, although it may also be used in hotels or offices. When classifying furniture according to the component material from which it is made, furniture made from more than one material is classified based on the material used in the frame, or if there is no frame, the predominant component material. Upholstered household furniture (excluding kitchen and dining room chairs with upholstered seats) is classified without regard to the frame material. Kitchen or dining room chairs with upholstered seats are classified according to the frame material. Furniture may be made on a stock or custom basis and may be shipped assembled or unassembled (i.e., knockdown). The manufacture of furniture parts and frames is included in this subsector. Some of the processes used in furniture manufacturing are similar to processes that are used in other segments of manufacturing. For example, cutting and assembly occurs in the production of wood trusses that are classified in Subsector 321, Wood Product Manufacturing. However, the multiple processes that distinguish wood furniture manufacturing from wood product manufacturing warrant inclusion of wooden furniture manufacturing in the Furniture and Related Product Manufacturing subsector. Metal furniture manufacturing uses techniques that are also employed in the manufacturing of roll-formed products classified in Subsector 332, Fabricated Metal Product Manufacturing. The molding process for plastics furniture is similar to the molding of other plastics products. However, plastics furniture producing establishments tend to specialize in furniture. NAICS attempts to keep furniture manufacturing together, but there are two notable exceptions: seating for transportation equipment and laboratory and hospital furniture. These exceptions are related to that fact that some of the aspects of the production process for these products, primarily the design, are highly integrated with that of other manufactured goods, namely motor vehicles and health equipment.

337110 Wood Kitchen Cabinet and Countertop Manufacturing

This industry comprises establishments primarily engaged in manufacturing wood or plastics laminated on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding). The cabinets and counters may be made on a stock or custom basis.

337127 Institutional Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing institutional-type furniture (e.g., library, school, theater, and church furniture). The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337212 Custom Architectural Woodwork and Millwork Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing custom designed interiors consisting of architectural woodwork and fixtures utilizing wood, wood products, and plastics laminates. All of the industry output is made to individual order on a job shop basis and requires skilled craftsmen as a labor input. A job might include custom manufacturing of display fixtures, gondolas, wall shelving units, entrance and window architectural detail, sales and reception counters, wall paneling, and matching furniture.

337214 Office Furniture (except Wood) Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing nonwood office-type furniture. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).

337215 Showcase, Partition, Shelving, and Locker Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing wood and nonwood office and store fixtures, shelving, lockers, frames, partitions, and related fabricated products of wood and nonwood materials, including plastics laminated fixture tops. The products are made on a stock basis and may be assembled or unassembled (i.e., knockdown). Establishments exclusively making furniture parts (e.g., frames) are included in this industry.

339 Miscellaneous Manufacturing

Industries in the Miscellaneous Manufacturing subsector make a wide range of products that cannot readily be classified in specific NAICS subsectors in manufacturing. Processes used by these establishments vary significantly, both among and within industries. For example, a variety of manufacturing processes are used in manufacturing sporting and athletic goods that include products, such as tennis racquets and golf balls. The processes for these products differ from each other, and the

processes differ significantly from the fabrication processes used in making dolls or toys, the melting and shaping of precious metals to make jewelry, and the bending, forming, and assembly used in making medical products. The industries in this subsector are defined by what is made rather than how it is made. Although individual establishments might be appropriately classified elsewhere in the NAICS structure, for historical continuity, these product-based industries were maintained. In most cases, no one process or material predominates for an industry. Establishments in this subsector manufacture products as diverse as medical equipment and supplies, jewelry, sporting goods, toys, and office supplies.

339111 Laboratory Apparatus and Furniture Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing laboratory apparatus and laboratory and hospital furniture (except dental). Examples of products made by these establishments are hospital beds, operating room tables, laboratory balances and scales, furnaces, ovens, centrifuges, cabinets, cases, benches, tables, and stools.

339112 Surgical and Medical Instrument Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing medical, surgical, ophthalmic, and veterinary instruments and apparatus (except electrotherapeutic, electromedical and irradiation apparatus). Examples of products made by these establishments are syringes, hypodermic needles, anesthesia apparatus, blood transfusion equipment, catheters, surgical clamps, and medical thermometers.

339113 Surgical Appliance and Supplies Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing surgical appliances and supplies. Examples of products made by these establishments are orthopedic devices, prosthetic appliances, surgical dressings, crutches, surgical sutures, and personal industrial safety devices (except protective eyewear).

339114 Dental Equipment and Supplies Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing dental equipment and supplies used by dental laboratories and offices of dentists, such as dental chairs, dental instrument delivery systems, dental hand instruments, and dental impression material and dental cements.

339999 All Other Miscellaneous Manufacturing

This U.S. industry comprises establishments primarily engaged in miscellaneous manufacturing (except medical equipment and supplies, jewelry and flatware, sporting and athletic goods, dolls, toys, games, office supplies (except paper), musical instruments, fasteners, buttons, needles, pins, brooms, brushes, mops, and burial caskets).

423 Merchant Wholesalers, Durable Goods

Industries in the Merchant Wholesalers, Durable Goods subsector sell capital or durable goods to other businesses. Merchant wholesalers generally take title to the goods that they sell; in other words, they buy and sell goods on their own account. Durable goods are new or used items generally with a normal life expectancy of three years or more. Durable goods merchant wholesale trade establishments are engaged in wholesaling products, such as motor vehicles, furniture, construction materials, machinery and equipment (including household-type appliances), metals and minerals (except petroleum), sporting goods, toys and hobby goods, recyclable materials, and parts. Business-to-business electronic markets, agents, and brokers primarily engaged in wholesaling durable goods, generally on a commission or fee basis, are classified in Subsector 425, Wholesale Electronic Markets and Agents and Brokers.

423210 Furniture Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of furniture (except hospital beds, medical furniture, and drafting tables).

423220 Home Furnishing Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of home furnishings and/or housewares.

423310 Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of lumber; plywood; reconstituted wood fiber products; wood fencing; doors and windows and their frames (all materials); wood roofing and siding; and/or other wood or metal millwork.

423320 Brick, Stone, and Related Construction Material Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of stone, cement, lime, construction sand, and gravel; brick; asphalt and concrete mixtures; and/or concrete, stone, and structural clay products.

423330 Roofing, Siding, and Insulation Material Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of nonwood roofing and nonwood siding and insulation materials.

423390 Other Construction Material Merchant Wholesalers

This industry comprises (1) establishments primarily engaged in the merchant wholesale distribution of manufactured homes (i.e., mobile homes) and/or prefabricated buildings and (2) establishments primarily engaged in the merchant wholesale distribution of construction materials (except lumber, plywood, millwork, wood panels, brick, stone, roofing, siding, electrical and wiring supplies, and insulation materials).

423420 Office Equipment Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of office machines and related equipment (except computers and computer peripheral equipment).

423440 Other Commercial Equipment Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of commercial and related machines and equipment (except photographic equipment and supplies; office equipment; and computers and computer peripheral equipment and software) generally used in restaurants and stores.

423450 Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional medical equipment, instruments, and supplies (except ophthalmic equipment and instruments and goods used by ophthalmologists, optometrists, and opticians).

423460 Ophthalmic Goods Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional equipment, instruments, and/or goods sold, prescribed, or used by ophthalmologists, optometrists, and opticians.

423490 Other Professional Equipment and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of professional equipment and supplies (except ophthalmic goods and medical, dental, and hospital equipment and supplies).

423510 Metal Service Centers and Other Metal Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of products of the primary metals industries. Service centers maintain inventory and may perform functions, such as sawing, shearing, bending, leveling, cleaning, or edging, on a custom basis as part of sales transactions.

423610 Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of electrical construction materials; wiring supplies; electric light fixtures; light bulbs; and/or electrical power equipment for the generation, transmission, distribution, or control of electric energy.

423690 Other Electronic Parts and Equipment Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of electronic parts and equipment (except electrical apparatus and equipment, wiring supplies and construction material; and electrical appliances, television and radio sets).

423710 Hardware Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of hardware, knives, or hand tools.

423720 Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of plumbing equipment, hydronic heating equipment, house-hold- type gas appliances (except gas clothes dryers), and/or supplies.

423730 Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of warm air heating and air-conditioning equipment and supplies.

423740 Refrigeration Equipment and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of refrigeration equipment (except household-type refrigerators, freezers, and air-conditioners).

423830 Industrial Machinery and Equipment Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in manufacturing, oil well, and warehousing activities.

423840 Industrial Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of supplies for machinery and equipment generally used in manufacturing, oil well, and warehousing activities.

423910 Sporting and Recreational Goods and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of sporting goods and accessories; billiard and pool supplies; sporting firearms and ammunition; and/or marine pleasure craft, equipment, and supplies.

423920 Toy and Hobby Goods and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of games, toys, fireworks, playing cards, hobby goods and supplies, and/or related goods.

423990 Other Miscellaneous Durable Goods Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of durable goods (except motor vehicle and motor vehicle parts and supplies; furniture and home furnishings; lumber and other construction materials; professional and commercial equipment and supplies; metals and minerals (except petroleum); electrical goods; hardware, and plumbing and heating equipment and supplies; machinery, equipment and supplies; sporting and recreational goods and supplies; toy and hobby goods and supplies; recyclable materials; and jewelry, watches, precious stones and precious metals).

424 Merchant Wholesalers, Nondurable Goods

Industries in the Merchant Wholesalers, Nondurable Goods subsector sell nondu-rable goods to other businesses. Nondurable goods are items generally with a normal life expectancy of less than three years. Nondurable goods merchant whole-sale trade establishments are engaged in wholesaling products, such as paper and paper products, chemicals and chemical products, drugs, textiles and textile products, apparel, footwear, groceries, farm products, petroleum and petroleum products,

alcoholic beverages, books, magazines, newspapers, flowers and nursery stock, and tobacco products. The detailed industries within the subsector are organized in the classification structure based on the products sold. Business to business electronic markets, agents, and brokers primarily engaged in wholesaling nondurable goods, generally on a commission or fee basis, are classified in Subsector 425, Wholesale Electronic Markets and Agents and Brokers.

424210 Drugs and Druggists' Sundries Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of biological and medical products; botanical drugs and herbs; and pharmaceutical products intended for internal and external consumption in such forms as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

424610 Plastics Materials and Basic Forms and Shapes Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of plastics materials and resins, and unsupported plastics film, sheet, sheeting, rod, tube, and other basic forms and shapes.

424690 Other Chemical and Allied Products Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of chemicals and allied products (except agricultural and medicinal chemicals, paints and varnishes, fireworks, and plastics materials and basic forms and shapes).

424950 Paint, Varnish, and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of paints, varnishes, and similar coatings; pigments; wallpaper-per; and supplies, such as paint brushes and rollers.

484 Truck Transportation

Industries in the Truck Transportation subsector provide over-the-road transportation of cargo using motor vehicles, such as trucks and tractor trailers. The subsector is subdivided into general freight trucking and specialized freight trucking. This distinction reflects differences in equipment used, type of load carried, scheduling, terminal, and other networking services. General freight transportation establishments handle a wide variety of general commodities, generally palletized, and transported in a container or van trailer. Specialized freight transportation is the transportation of cargo that, because of size, weight, shape, or other inherent characteristics require specialized equipment for transportation. Each of these industry groups is further subdivided based on distance traveled. Local trucking establishments primarily carry goods within a single metropolitan area and its adjacent nonurban areas. Long distance trucking establishments carry goods between metropolitan areas. The Specialized Freight Trucking industry group includes a separate industry for Used Household and Office Goods Moving. The household and office goods movers are separated because of the substantial network of establishments that has developed to deal with local and long-distance moving and the associated storage. In this area, the same establishment provides both local and long-distance services, while other specialized freight establishments generally limit their services to either local or long-distance hauling.

484120 General Freight Trucking, Long-Distance

This industry comprises establishments primarily engaged in providing long-distance general freight trucking. General freight establishments handle a wide variety of commodities, generally palletized and transported in a container or van trailer. Long-distance general freight trucking establishments usually provide trucking between metropolitan areas which may cross North American country borders. Included in this industry are establishments operating as truckload (TL) or less than truckload (LTL) carriers.

518210 Data Processing, Hosting, and Related Services

This industry comprises establishments primarily engaged in providing infrastructure for hosting or data processing services. These establishments may provide specialized hosting activities, such as Web hosting, streaming services or application hosting, provide application service provisioning, or may provide general time-share mainframe facilities to clients. Data processing establishments provide complete processing and specialized reports from data supplied by clients or provide automated data processing and data entry services.

5241 Insurance Carriers

This industry group comprises establishments primarily engaged in underwriting (assuming the risk, assigning premiums, and so forth) annuities and insurance policies and investing premiums to build up a portfolio of financial assets to be used against future claims. Direct insurance carriers are establishments that are primarily engaged in initially underwriting and assuming the risk of annuities and insurance policies. Reinsurance carriers are establishments that are primarily engaged in assuming all or part of the risk associated with an existing insurance policy (or set of policies) originally underwritten by another insurance carrier. Industries are defined in terms of the type of risk being insured against, such as death, loss of employment because of age or disability, and/or property damage. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves.

524113 Direct Life Insurance Carriers

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) annuities and life insurance policies, disability income insurance policies, and accidental death and dismemberment insurance policies.

524114 Direct Health and Medical Insurance Carriers

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) health and medical insurance policies. Group hospitalization plans and HMO establishments (except those providing health care services) that provide health and medical insurance policies without providing health care services are included in this industry.

524126 Direct Property and Casualty Insurance Carriers

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) insurance policies that protect policyholders against losses that may occur as a result of property damage or liability.

524127 Direct Title Insurance Carriers

This U.S. industry comprises establishments primarily engaged in initially under-writing (i.e., assuming the risk and assigning premiums) insurance policies to protect the owners of real estate or real estate creditors against loss sustained by reason of any title defect to real property.

524128 Other Direct Insurance (except Life, Health, and Medical) Carriers

This U.S. industry comprises establishments primarily engaged in initially under-writing (e.g., assuming the risk, assigning premiums) insurance policies (except life, disability income, accidental death and dismemberment, health and medical, property and casualty, and title insurance policies).

524130 Reinsurance Carriers

This industry comprises establishments primarily engaged in assuming all or part of the risk associated with existing insurance policies originally underwritten by other insurance carriers.

541 Professional, Scientific, and Technical Services

Industries in the Professional, Scientific, and Technical Services subsector group establishments engaged in processes where human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. The individual industries of this subsector are defined on the basis of the particular expertise and training of the services provider. The distinguishing feature of the Professional, Scientific, and Technical Services subsector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance, unlike health care, for example, where “high tech” machines and materials are important collaborating inputs to labor skills in the production of health care. Thus, the establishments classified in this subsector sell expertise. Much of the expertise requires degrees, though not in every case.

541380 Testing Laboratories

This industry comprises establishments primarily engaged in performing physical, chemical, and other analytical testing services, such as acoustics or vibration testing, assaying, biological testing (except medical and veterinary), calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing. The testing may occur in a laboratory or on-site.

541710 Research and Development in the Physical, Engineering, and Life Sciences

This industry comprises establishments primarily engaged in conducting research and experimental development in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects.