

AREA SECTOR ANALYSIS PROCESS

West Central Mountains, ID

February 16, 2017

University Center for Economic Development, University of Nevada, Reno
Western Rural Development Center, Utah State University



National and state level business data summary statistics for sectors with top ranking compatibility and desirability.

TABLE OF CONTENTS

Section	NAICS	Description	Page
I		Sector Selection Methodology	1
		Report Overview	1
		ASAP Inputs Summary Grand County, UT	2
		Community Development Rankings: Goal and Indicator ASAP	2
		Asset Values	3
		Selected Sectors	5
II	11	Agriculture, Forestry, Fishing and Hunting	6
111		Crop Production	6
1112		Vegetable and Melon Farming	7
III	22	Utilities	11
221		Utilities	11
2211		Electric Power Generation, Transmission, and Distribution	11
IV	31-33	Manufacturing	16
312		Beverage and Tobacco Product Manufacturing	18
3121		Beverage Manufacturing	18
325		Chemical Manufacturing	23
3252		Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	23
3254		Pharmaceutical and Medicine Manufacturing	27
334		Computer and Electronic Product Manufacturing	31
3345		Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	31
335		Electrical Equipment, Appliance, and Component Manufacturing	37
3353		Electrical Equipment Manufacturing	37
	42	Electrical Equipment Manufacturing V	41
Wholesale Trade			42
424		Merchant Wholesalers, Nondurable Goods	42
4241		Paper and Paper Product Merchant Wholesalers	46
4242		Drugs and Druggists' Sundries Merchant Wholesalers	49
4248		Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	52
4249		Miscellaneous Nondurable Goods Merchant Wholesalers	57
VI	51	Information	58
515		Broadcasting (except Internet)	59
5152		Cable and Other Subscription Programming	62
517		Telecommunications	62
5179		Other Telecommunications VII	66
	52	Other Telecommunications	67
Finance and Insurance			67
523		Securities, Commodity Contracts, and Other Financial Investments and Related Activities	67
	5239	Other Financial Investment Activities	73
VIII	54	Professional, Scientific, and Technical Services	73
541		Professional, Scientific, and Technical Services	78
5417		Scientific Research and Development Services	78
IX	71	Administrative and Support and Waste Management and Remediation Services	78
713		Waste Management and Remediation Services	84
7139		Remediation and Other Waste Management Services	84
X	92	Administrative and Support and Waste Management and Remediation Services	84
926		Waste Management and Remediation Services	
9261		Remediation and Other Waste Management Services	

The purpose of this document is to provide additional information on the top 17 4-digit North American Industry Classification System (NAICS) sectors ranked with the highest compatibility index (CI) and the highest desirability index (DI) by the ASAP (Area Sector Analysis Process) generated for Greater Valley County, ID in September, 2016.

Sector Selection Methodology

The list of 17 targeted sectors was generated during the fifth module of the ASAP in November 2016 by the Greater Valley County ASAP steering committee members along with feedback from the ASAP facilitators. All sector selections are based on the ASAP results presented in September 2016 with a focus on ASAP Table 3: Industries with High Desirability and Compatibility Index Scores (DI > .40, CI > .60).

Report Overview

The 17 selected sectors are reported using 2012 NAICS 4-digit level of aggregation. NAICS is the standard classification system used by federal agencies when reporting economics statistics related to business sectors. The NAICS organizational structure is also used by states and for economic reporting, and is used by Canada and Mexico to facilitate business sector analysis across all North American Countries.

NAICS sectors can be aggregated at several different levels from 2-digit to 6-digit with the numerical NAICS code increasing as the business sector is further disaggregated. The more disaggregated a sector the more representative the associated information will be for the specific sector. Table 1¹ details this aggregation² and provides an example.

TABLE 1: NAICS Aggregation

NAICS Aggregation	NAICS Aggregation Description	NAICS Example	NAICS Example Sector Description
XX	Industry Sector (20 broad sectors up from 10 SIC)	11	Agriculture, Forestry, Fishing and Hunting
XXX	Industry Sub sector	111	Crop Production
XXXX	Industry Group	1113	Fruit and Tree Nut Farming
XXXXX	Industry	11133	Non-citrus Fruit and Tree Nut Farming
XXXXXX	U.S., Canadian or Mexican National specific	111331	Apple Orchards

¹ Adapted from: <https://www.census.gov/eos/www/naics/index.html>

² While this example reflects unique descriptions across all NAICS, some sectors share the same description across NAICS aggregations.

ASAP Inputs Summary Greater Valley County, ID

Tables 2 and 3 reflect the average weight ranking of importance for each goal and indicator in the Community Goal Survey. A total of 62 surveys were completed by Greater Valley County, ID residents during Summer and Fall 2016.

TABLE 2: Community Development Goal Rankings

<i>Goal</i>	<i>Weight</i>	<i>Rank</i>
Economic Quality	38.8%	1
Environmental Quality	36.7%	2
Social Quality	24.5%	3

TABLE 3: Community Development Indicator Rankings

<i>Indicator</i>	<i>Weight</i>	<i>Rank</i>
G1.I1 - Every new job generates additional jobs in the community	6.8%	8
G1.I2 - New businesses return profits to the community	6.9%	7
G1.I3 - New businesses hire locally	11.25%	1
G1.I4 - New businesses buy locally	6.4%	9
G1.I5 - New businesses increase the average local wage	7.5%	5
G2.I1 - New businesses do not pollute the water	8.8%	3
G2.I2 - New businesses do not release toxic chemicals in the air	8.70%	4
G2.I3 - New businesses are in compliance with hazardous waste management	9.2%	2
G2.I4 - New businesses do not emit greenhouse gas	6.1%	11
G2.I5 - New businesses do not develop undeveloped land	4.0%	13
G3.I1 - New businesses increase the local tax base	3.2%	15
G3.I2 - New jobs are full-time	6.3%	10
G3.I3 - New jobs offer benefits (health and/or retirement)	7.1%	6
G3.I4 - New jobs provide training programs	3.8%	14
G3.I5 - New businesses support community activities	4.1%	12
Number of observations	40	

Table 4 reports the asset values used to calculate the DI and CI for both Greater Valley County, ID as well as the baseline asset values used to compare the identified ‘best’ or ‘worst’ communities in the United States. For example, Glasgow, MT is identified as the most remote incorporated community based on driving distance to a metropolitan with a population of at least 50,000. Community asset data was sourced from the Community Asset Inventory (CAI) and the Community Goal Survey (CGS), both of which were obtained from the steering committee. Asset data used to calculate ratios to comparable communities was validated and may be modified for source consistency.

TABLE 4: ASAP Asset Values

Asset	Description	Source	Asset Values			Asset Value Basis	
			Valley, ID	Baseline	Ratio	Valley, ID	Baseline
A1	Access within 30 minutes to interstate	CAI	No	---	---		
A2	Access within 30 minutes to package freight	CAI	Yes	---	---		
A3	Access within 30 minutes to railhead	CAI	No	---	---		
A4	Access within 30 minutes to rail freight	CAI	No	---	---		
A5	Access within 30 minutes to passenger air	CAI	No	---	---		
A6	Access within 30 minutes to port/harbor	CAI	No	---	---		
A7	Access within 30 minutes to international port	CAI	No	---	---		
A8	Access to natural gas pipeline	CAI	No	---	---		
A9 & A10	Driving miles to metropolitan area population > 50,000	CAI	75	282	26.60%	Boise, ID	Glasgow, MT
A11	3-phase electric	CAI	Yes	---	---		
A12	Fiber optic lines	CAI	No	---	---		
A13	High-volume water supply	CAI	Yes	---	---		
A14	High-volume wastewater disposal	CAI	No	---	---		
A15	Solid waste disposal	CAI	Yes	---	---		
A16*	Cell phone service	CAI	N/A	N/A	N/A		
A17	Local public transportation	CAI	Yes	---	---		
A18	Expansion site	CAI	Yes	---	---		
A19	High-speed internet	CAI	No	---	---		

A20	% of workforce with college degree or equivalent	CAI	34.00%	56.52%	60.16%	Washington, D.C.
A21	% of workforce with HS degree or equivalent	CAI	92.90%	92.44%	100.50%	Montana
A22	% of workforce with less than HS degree	CAI	7.10%	18.51%	38.36%	California
A23	Prevailing yearly wage	CAI			46.24%	N. Borough, AK
			49,722.00	107,528.00		
A24	Workers compensation tax rate	CAI	2.01%	3.48%	57.76%	California
A25	Business income tax rate	CAI	7.40%	9.99%	74.07%	Pennsylvania
A26*	Local and state government incentives	CAI	N/A	N/A	N/A	
A27*	Union labor	CAI	N/A	N/A	N/A	
A28	Specialized job training programs (excl. college and university	CAI	Yes	---	---	
A29	Short- and long-term financing	CAI	Yes	---	---	
A30*	Business/trade association	CAI	N/A	N/A	N/A	
A31	Crime rate	CAI	5.28%	6.58%	80.15%	Tuscon, AZ
A32	Median home price	CAI			22.04%	San Jose (et.al), CA MSA
			207,200.00	940,000.00		
A33	Air and water quality	CGS	91.25	---	---	
A34	Natural ecosystem	CGS	90.00	---	---	
A35	Outdoor recreation opportunities	CGS	95.00	---	---	
A36	Social and cultural opportunities	CGS	45.63	---	---	
A37	Retail shopping opportunities	CGS	23.75	---	---	
A38	Education system (K-12)	CGS	66.25	---	---	
A39	Access within 3 minutes to a college or university	CAI	No	---	---	
A40	Health care services	CGS	52.50	---	---	
A41	Public safety services (e.g. police, fire)	CGS	61.25	---	---	

* = Not included in ASAP Model

CAI = Community Asset Inventory - values provided by steering committee; ratio values validated and modified where necessary

CGS = Community Goal Survey - average of all community survey rankings (1=lowest, 10=highest)

Data Source Discussion

Six distinct information sets are provided for each of the 16 selected sectors. The information sets are as follow:

2012 NAICS Definition

The text description provided for each sector is sourced from the U.S. Census Bureau³. All levels of aggregation are reported for each selected sector, though not all sectors are disaggregated at all levels. The Table of Contents at the beginning of this report organizes the report at the 2-digit, 3-digit, and 4-digit NAICS levels.

Each sector description references closely related sectors as *cross-references* that may or may not be included in this report. Additional information on the related sectors not included in this report or for additional information on NAICS in general access the NAICS webpage at the address in Footnote 3.

Superscripts of “T” within the numerical code text mean that Canadian, Mexican, and United States industries are comparable. For all tables, “NR” means that no data was available for that specific data point.

National NAICS Economic Trends

This table reports national level economic summary statistics for number of establishments, annual payroll, number of employees, average payroll, and average employment for each sector. These measures are reported for each year 2010 through 2013 – presenting annual data side-by-side may reveal economic trends specific to the sector.

The data is sourced for sectors 1131 and above from the U.S. Census American Fact Finder⁴ County Business Patterns and for sectors below 1131 from the U.S. Department of Agriculture Census of Agriculture⁵. For agricultural sectors (those below 1131) 2007 and 2012 are the only data years available. As of 2/16/17, 2014 is the most recent data year for all sectors 1131 and higher.

Top 10 Producer States

This table reports the top 10 producing states in the U.S. for each sector based on total annual payroll. The number of establishments and the number of employees per state is also reported. Data source is identical to *National NAICS Economic Trends* table.

Top 10 Western States

This table reports the top 10 producing states in the Western⁶ U.S. for each sector based on total annual payroll. The number of establishments and the number of employees per state is also reported. Data source is identical to *National NAICS Economic Trends* table.

ASAP Business Survey Statistics

This table reports select summary statistics from the ASAP Business Location Choice Survey for each sector. The average level of importance reported by all firms classified within the same 4-digit NAICS are given for various measures in three categories - physical infrastructure, economic infrastructure, and quality of life. These responses were used in calculating the DI (economic infrastructure and quality of life) and CI (physical infrastructure and quality of life). Data is sourced from the ASAP business database maintained by the University Center for Economic Development (UCED) at the University of Nevada, Reno.

Selected Sectors

³ http://www.census.gov/eos/www/naics/2012NAICS/2012_Definition_File.pdf

⁴ <http://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t>

⁵ <http://www.agcensus.usda.gov/Publications/2012/>

⁶ Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

TABLE 5: High Ranking Selected NAICS Sectors

NAICS4	Description	Existing	DI	CI
1112	Vegetable and Melon Farming	X	0.5669	0.8265
2211	Electric Power Generation, Transmission and Distribution	X	0.6279	0.7128
3121	Beverage Manufacturing		0.3843	0.9024
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing		0.5552	0.8074
3254	Pharmaceutical and Medicine Manufacturing		0.6255	0.7820
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing		0.5546	0.6695
3353	Electrical Equipment Manufacturing		0.5621	0.8370
4241	Paper and Paper Product Merchant Wholesalers	X	0.5698	0.7583
4242	Drugs and Druggists' Sundries Merchant Wholesalers	X	0.5539	0.7082
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	X	0.6004	0.6614
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	X	0.6237	0.5800
5152	Cable and Other Subscription Programming		0.5559	0.7769
5179	Other Telecommunications	X	0.6456	0.9119
5239	Other Financial Investment Activities	X	0.6441	0.8468
5417	Scientific Research and Development Services	X	0.5677	0.8069
7139	Other Amusement and Recreation Industries	X	0.4443	0.9056
9261	Administration of Economic Program	X	0.6264	0.8994

Sector 11--Agriculture, Forestry, Fishing and Hunting

The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.

The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries. A farm may consist of a single tract of land or a number of separate tracts which may be held under different tenures. For example, one tract may be owned by the farm operator and another rented. It may be operated by the operator alone or with the assistance of members of the household or hired employees, or it may be operated by a partnership, corporation, or other type of organization. When a landowner has one or more tenants, renters, croppers, or managers, the land operated by each is considered a farm.

The sector distinguishes two basic activities: agricultural production and agricultural support activities. Agricultural production includes establishments performing the complete farm or ranch operation, such as farm owner-operators, tenant farm operators, and sharecroppers. Agricultural support activities include establishments that perform one or more activities associated with farm operation, such as soil preparation, planting, harvesting, and management, on a contract or fee basis.

Excluded from the Agriculture, Forestry, Fishing and Hunting sector are establishments primarily engaged in agricultural research and establishments primarily engaged in administering programs for regulating and conserving land, mineral, wildlife, and forest use. These establishments are classified in Industry 54171, Research and Development in the Physical, Engineering, and Life Sciences; and Industry 92412, Administration of Conservation Programs, respectively.

111 Crop Production^T

Industries in the Crop Production subsector grow crops mainly for food and fiber. The subsector comprises establishments, such as farms, orchards, groves, greenhouses, and nurseries, primarily engaged in growing crops, plants, vines, or trees and their seeds.

The industries in this subsector are grouped by similarity of production activity, including biological and physiological characteristics and economic requirements, the length of growing season, degree of crop rotation, extent of input specialization, labor requirements, and capital demands. The production process is typically completed when the raw product or commodity grown reaches the "farm gate" for market, that is, at the point of first sale or price determination.

Establishments are classified to the Crop Production subsector when crop production (i.e., value of crops for market) accounts for one-half or more of the establishment's total agricultural production. Within the subsector, establishments are classified to a specific industry when a product or industry family of products (i.e., oilseed and grain farming, vegetable and melon farming, fruit and tree nut farming) account for one-half or more of the establishment's agricultural production. Establishments with one-half or more crop production with no one product or family of products of an industry accounting for one-half of the establishment's agricultural production are treated as general combination crop farming and are classified in Industry 11199, All Other Crop Farming.

Industries in the Crop Production subsector include establishments that own, operate, and manage and those that operate and manage. Those that manage only are classified in Subsector 115, Support Activities for Agriculture and Forestry. Establishments that raise aquatic plants in controlled or selected aquatic environments are classified in Subsector 112, Animal Production and Aquaculture.

1112 Vegetable and Melon Farming^T

This industry group comprises establishments primarily engaged in growing root and tuber crops (except sugar beets and peanuts) or edible plants and/or producing root and tuber or edible plant seeds. The crops included in this group have an annual growth cycle and are grown in open fields. Climate and cultural practices limit producing areas but often permit the growing of a combination of crops in a year.

11121 Vegetable and Melon Farming^T

This industry comprises establishments primarily engaged in one or more of the following: (1) growing vegetable and/or melon crops; (2) producing vegetable and/or melon seeds; and (3) growing vegetable and/or melon bedding plants.

Cross-References. Establishments primarily engaged in--

- Growing sugar beets--are classified in Industry 11199, All Other Crop Farming;
- Growing vegetables and melons under glass or protective cover--are classified in Industry 11141, Food Crops Grown Under Cover;
- Growing dry peas and beans--are classified in Industry 11113, Dry Pea and Bean Farming;
- Growing corn (except sweet corn)--are classified in Industry 11115, Corn Farming;
- Canning, pickling, and/or drying (artificially) vegetables--are classified in Industry 31142, Fruit and Vegetable Canning, Pickling, and Drying; and
- Growing fruit on trees and other fruit-bearing plants (except melons)--are classified in Industry Group 1113, Fruit and Tree Nut Farming.

111211 Potato Farming

This U.S. industry comprises establishments primarily engaged in growing potatoes and/or producing seed potatoes.

Cross-References.

Establishments primarily engaged in canning or drying potatoes are classified in Industry 31142, Fruit and Vegetable Canning, Pickling, and Drying.

111219 Other Vegetable (except Potato) and Melon Farming

This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) growing melons and/or vegetables (except potatoes; dry peas; dry beans; field, silage, or seed corn; and sugar beets); (2) producing vegetable and/or melon seeds; and (3) growing vegetable and/or melon bedding plants.

Illustrative Examples:

Carrot farming
Squash farming
Green bean farming
Tomato farming
Melon farming (e.g., cantaloupe, casaba, honeydew, watermelon)

Vegetable (except potato) farming
Pepper farming (e.g., bell, chili, green, red, sweet peppers)
Watermelon farming

Cross-References. Establishments primarily engaged in--

- Growing potatoes, including sweet potatoes and yams--are classified in U.S. Industry 111211, Potato Farming;
- Growing sugar beets--are classified in U.S. Industry 111991, Sugar Beet Farming;
- Growing vegetables and melons under glass or protective cover--are classified in U.S. Industry 111419, Other Food Crops Grown Under Cover;
- Growing dry peas and beans--are classified in Industry 111130, Dry Pea and Bean Farming;
- Growing corn (except sweet corn)--are classified in Industry 111150, Corn Farming;
- Canning, pickling, and/or drying (artificially) vegetables--are classified in Industry 31142, Fruit and Vegetable Canning, Pickling, and Drying; and
- Growing fruit on trees and other fruit-bearing plants (except melons)--are classified in Industry Group 1113, Fruit and Tree Nut Farming.

National Totals by Year			
NAICS 1112 - Vegetable and Melon Farming			
	2007	2012	Recent Yr. Trend
Number of Establishments	40,589.00	43,021.00	5.99%
Annual Payroll (\$1000)	\$ 2,204,929.00	\$ 2,578,204.00	16.93%
Employees	255,940.00	246,423.00	-3.72%
Average Payroll Per Employee	\$ 8,615.02	\$ 10,462.51	21.44%
Average Employment Per Establishment	6.31	5.73	-9.16%

*Employees and Annual Payroll Reported For Hired Labor Only

2012 Top 10 Producer States			
NAICS 1112 - Vegetable and Melon Farming			
	Establishments	Annual Payroll (\$1,000)	Paid Employees
Total U.S.	43,021	\$ 2,578,204	
15,656			
California	4,191	\$ 901,494	2,072
Florida	1,084	\$ 258,549	499
Washington	1,924	\$ 161,309	669
Arizona	1,625	\$ 127,954	348
Idaho	758	\$ 103,501	491
Michigan	1,737	\$ 88,716	705
Oregon	1,184	\$ 85,734	510
New York	2,031	\$ 77,937	773
North Carolina	2,022	\$ 62,530	624
Wisconsin	1,318	\$ 59,583	538
Subtotal	17,874	\$ 1,927,307	7,229
% of U.S.	41.55%	74.75%	46.17%

2012 Top Western Producer States			
NAICS 1112 - Vegetable and Melon Farming			
	Establishments	Annual Payroll (\$1,000)	Paid Employees
Total U.S.	43,021	\$ 2,578,204	
15,656			
Alaska	108	\$ 1,415	42
Arizona	1,625	\$ 127,954	348
California	4,191	\$ 901,494	2,072
Colorado	455	\$ 48,276	222
Hawaii	744	(D)	261
Idaho	758	\$ 103,501	491

Montana	203	\$	5,479	61
Nevada	82	\$	7,359	30
New Mexico	1,291	\$	14,415	294
Oregon	1,184	\$	85,734	510
Utah	463	(D)		137
Washington	1,924	\$	161,309	669
Wyoming	26	(D)		5
Subtotal	13,054		1,456,936	5,142
% of U.S.	30.34%		56.51%	32.84%

NAICS 1112 - Vegetable and Melon Farming				N = 5
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	60%	20%	20%	0%
Access within 30 minutes to package freight services	40%	40%	0%	20%
Immediate access to a railhead or rail spur	100%	0%	0%	0%
Access within 30 minutes to rail freight	80%	20%	0%	0%
Access within 30 minutes to passenger air services	60%	40%	0%	0%
Access within 30 minutes to port or harbor facilities	60%	20%	0%	20%
Access within 30 minutes to an international trade port	80%	0%	20%	0%
Access to natural gas pipeline	60%	0%	0%	20%
Access within one day, at a reasonable cost, to the supplies you need	20%	0%	0%	80%
Access within one day, at a reasonable cost, to your customers	20%	0%	0%	80%
Access to 3-phase electric power	20%	20%	0%	40%
Access to fiber optic lines	40%	20%	20%	20%
Availability of high-volume water supply	20%	20%	20%	40%
Availability of high-volume wastewater disposal	80%	20%	0%	0%
Availability of solid waste disposal	80%	20%	0%	0%
Availability of cell phone service	20%	0%	20%	40%
Availability of local public transportation	80%	0%	0%	20%
Possibility for future expansion at site	40%	0%	20%	40%
Availability of high-speed internet	0%	20%	40%	40%
Access to ponds and streams	0%	20%	0%	0%
Availability of satellite transmission	0%	20%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	80%	0%	0%	20%
Availability of skilled workforce	40%	40%	0%	20%
Availability of technical workforce	80%	0%	0%	20%
Availability of unskilled workforce	0%	60%	0%	40%
Favorable local labor costs	40%	0%	0%	60%
Favorable worker's compensation tax rate	0%	40%	20%	40%
Favorable local business tax rates	0%	0%	40%	60%
Favorable state and local government incentives	80%	0%	0%	0%
Availability of union labor	40%	0%	20%	20%
Availability of specialized job training programs	60%	0%	40%	0%
Availability of long and short term financing	40%	0%	0%	60%

Existence of a business/trade association	40%	0%	40%	0%
Lenient environmental regulations	20%	0%	20%	40%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	0%	20%	80%
Availability of affordable housing	40%	0%	20%	40%
Clean air and water	0%	0%	20%	80%
High quality natural ecosystem	60%	0%	40%	0%
Outdoor recreation opportunities	60%	0%	20%	20%
Social and cultural opportunities	40%	20%	20%	20%
Retail shopping opportunities	40%	0%	60%	0%
Quality educational system (K-12)	60%	0%	20%	20%
Access within 30 minutes to college or university	60%	0%	0%	40%
Availability of quality healthcare	0%	0%	60%	40%
Availability of public safety services (e.g. police, fire station)	20%	0%	40%	40%
Climate	0%	0%	20%	60%
Ease of attracting skilled workers	0%	0%	0%	20%

Sector 22--Utilities^T

The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.

Excluded from this sector are establishments primarily engaged in waste management services classified in Subsector 562, Waste Management and Remediation Services. These establishments also collect, treat, and dispose of waste materials; however, they do not use sewer systems or sewage treatment facilities.

221 Utilities^T

Industries in the Utilities subsector provide electric power, natural gas, steam supply, water supply, and sewage removal through a permanent infrastructure of lines, mains, and pipes. Establishments are grouped together based on the utility service provided and the particular system or facilities required to perform the service.

2211 Electric Power Generation, Transmission, and Distribution^T

This industry group comprises establishments primarily engaged in generating, transmitting, and/or distributing electric power. Establishments in this industry group may perform one or more of the following activities: (1) operate generation facilities that produce electric energy; (2) operate transmission systems that convey the electricity from the generation facility to the distribution system; and (3) operate distribution systems that convey electric power received from the generation facility or the transmission system to the final consumer.

22111 Electric Power Generation

This industry comprises establishments primarily engaged in operating electric power generation facilities. These facilities convert other forms of energy, such as water power (i.e., hydroelectric), fossil fuels, nuclear power, and solar power, into

electrical energy. The establishments in this industry produce electric energy and provide electricity to transmission systems or to electric power distribution systems.

Cross-References.

Establishments primarily engaged in operating trash incinerators that also generate electricity are classified in Industry 56221, Waste Treatment and Disposal.

221111 Hydroelectric Power Generation

This U.S. industry comprises establishments primarily engaged in operating hydroelectric power generation facilities. These facilities use water power to drive a turbine and produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221112 Fossil Fuel Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating fossil fuel powered electric power generation facilities. These facilities use fossil fuels, such as coal, oil, or gas, in internal combustion or combustion turbine conventional steam process to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221113 Nuclear Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating nuclear electric power generation facilities. These facilities use nuclear power to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221114 Solar Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating solar electric power generation facilities. These facilities use energy from the sun to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221115 Wind Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating wind electric power generation facilities. These facilities use wind power to drive a turbine and produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221116 Geothermal Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating geothermal electric power generation facilities. These facilities use heat derived from the Earth to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

221117 Biomass Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating biomass electric power generation facilities. These facilities use biomass (e.g., wood, waste, alcohol fuels) to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

Cross-References.

Establishments primarily engaged in operating trash disposal incinerators that also generate electricity are classified in U.S. Industry 562213, Solid Waste Combustors and Incinerators.

221118 Other Electric Power Generation

This U.S. industry comprises establishments primarily engaged in operating electric power generation facilities (except hydroelectric, fossil fuel, nuclear, solar, wind, geothermal, biomass). These facilities convert other forms of energy, such as tidal power, into electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.

Cross-References. Establishments primarily engaged in--

- Operating trash disposal incinerators that also generate electricity--are classified in U.S. Industry 562213, Solid Waste Combustors and Incinerators;
- Operating hydroelectric power generation facilities--are classified in U.S. Industry 221111, Hydroelectric Power Generation;
- Operating fossil fuel powered electric power generation facilities--are classified in U.S. Industry 221112, Fossil Fuel Electric Power Generation;
- Operating nuclear electric power generation facilities--are classified in U.S. Industry 221113, Nuclear Electric Power Generation;
- Operating solar electric power generation facilities--are classified in U.S. Industry 221114, Solar Electric Power Generation;
- Operating wind electric power generation facilities--are classified in U.S. Industry 221115, Wind Electric Power Generation;
- Operating geothermal electric power generation facilities--are classified in U.S. Industry 221116, Geothermal Electric Power Generation; and
- Operating biomass electric power generation facilities--are classified in U.S. Industry 221117, Biomass Electric Power Generation.

22112 Electric Power Transmission, Control, and Distribution

This industry comprises establishments primarily engaged in operating electric power transmission systems, controlling (i.e., regulating voltages) the transmission of electricity, and/or distributing electricity. The transmission system includes lines and transformer stations. These establishments arrange, facilitate, or coordinate the transmission of electricity from the generating source to the distribution centers, other electric utilities, or final consumers. The distribution system consists of lines, poles, meters, and wiring that deliver the electricity to final consumers.

Cross-References.

Establishments primarily engaged in generating electric energy are classified in Industry 22111, Electric Power Generation.

221121 Electric Bulk Power Transmission and Control

This U.S. industry comprises establishments primarily engaged in operating electric power transmission systems and/or controlling (i.e., regulating voltages) the transmission of electricity from the generating source to distribution centers or other electric utilities. The transmission system includes lines and transformer stations.

Cross-References. Establishments primarily engaged in--

- Generating electric energy--are classified in Industry 22111, Electric Power Generation; and
- Distributing electricity to final consumers--are classified in U.S. Industry 221122, Electric Power Distribution.

221122 Electric Power Distribution

This U.S. industry comprises electric power establishments primarily engaged in either (1) operating electric power distribution systems (i.e., consisting of lines, poles, meters, and wiring) or (2) operating as electric power brokers or agents that arrange the sale of electricity via power distribution systems operated by others.

Cross-References. Establishments primarily engaged in--

- Generating electric energy--are classified in Industry 22111, Electric Power Generation; and
- Transmitting electricity between generating sources or distribution centers--are classified in U.S. Industry 221121, Electric Bulk Power Transmission and Control.

National Totals by Year						
NAICS 2211 - Electric power generation, transmission and distribution						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	10,266	10,401	10,602	10,565	-0.35%	2.50%
Annual Payroll (\$1000)	48,629,673	49,479,949	50,744,667	51,562,461	1.61%	4.04%
Employees	511,990	509,704	512,381	509,685	-0.53%	-0.27%
Average Payroll Per Employee(\$)	94,981.69	97,075.85	99,036.98	101,165.35	2.15%	
	4.33%					
Average Employment Per Establishment	49.87	49.01	48.33	48.24	-0.18%	-2.70%

2014 Top 10 Producer States			
NAICS 2211 - Electric power generation, transmission and distribution			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	51,562,461	10,565	509,685
Texas	3,737,936	985	38,500
New York	3,489,402	416	34,403
Pennsylvania	2,449,830	436	NR
Florida	2,345,165	442	22,935
Illinois	2,341,441	276	21,278

Michigan	2,143,799	243	NR
Georgia	1,765,699	478	20,211
New Jersey	1,755,279	219	NR
Virginia	1,344,105	240	NR
Missouri	1,177,421	228	11,926
Subtotal	22,550,077	3,963	149,253
% of U.S.	43.73%	37.51%	29.28%

2014 Top Western Producer States NAICS 2211 - Electric power generation, transmission and distribution Annual Payroll Establishments Paid Employees (\$1,000)			
Total U.S.	\$51,562,461	10,565	509,685
Alaska	146,955	79	1,587
Arizona	NR	61	NR
California	NR	518	NR
Colorado	688,887	193	NR
Hawaii	NR	23	NR
Idaho	NR	113	NR
Montana	229,257	143	2,604
Nevada	NR	84	NR
New Mexico	311,530	84	3,447
Oregon	613,995	171	NR
Utah	NR	154	NR
Washington	NR	136	NR
Wyoming	NR	101	NR
Subtotal	1,990,624	1,860	7,638
% of U.S.	3.86%	17.61%	1.50%

NAICS 2211 - Electric Power Generation, Transmission and Distribution Physical Infrastructure				N = 7 Very Important
	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	14%	29%	29%	29%
Access within 30 minutes to package freight services	43%	0%	29%	29%
Immediate access to a railhead or rail spur	57%	29%	14%	0%
Access within 30 minutes to rail freight	57%	0%	29%	14%
Access within 30 minutes to passenger air services	14%	43%	0%	43%
Access within 30 minutes to port or harbor facilities	86%	14%	0%	0%
Access within 30 minutes to an international trade port	71%	0%	14%	14%
Access to natural gas pipeline	57%	0%	0%	43%
Access within one day, at a reasonable cost, to the supplies you need	14%	14%	43%	29%
Access within one day, at a reasonable cost, to your customers	14%	14%	43%	29%
Access to 3-phase electric power	14%	14%	29%	43%
Access to fiber optic lines	43%	14%	0%	43%

Availability of high-volume water supply	57%	0%	14%	29%
Availability of high-volume wastewater disposal	57%	29%	0%	14%
Availability of solid waste disposal	43%	14%	0%	43%
Availability of cell phone service	0%	14%	29%	57%
Availability of local public transportation	71%	29%	0%	0%
Possibility for future expansion at site	14%	29%	57%	0%
Availability of high-speed internet	0%	0%	29%	29%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	14%	43%	29%	14%
Availability of skilled workforce	0%	0%	86%	14%
Availability of technical workforce	14%	14%	57%	14%
Availability of unskilled workforce	43%	29%	14%	14%
Favorable local labor costs	0%	14%	71%	14%
Favorable worker's compensation tax rate	0%	29%	57%	14%
Favorable local business tax rates	0%	14%	57%	29%
Favorable state and local government incentives	71%	0%	14%	0%
Availability of union labor	0%	14%	43%	43%
Availability of specialized job training programs	29%	0%	57%	14%
Availability of long and short term financing	14%	29%	14%	43%
Existence of a business/trade association	57%	29%	14%	0%
Lenient environmental regulations	29%	14%	29%	29%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	29%	57%	14%
Availability of affordable housing	0%	43%	43%	14%
Clean air and water	0%	14%	29%	57%
High quality natural ecosystem	0%	14%	57%	29%
Outdoor recreation opportunities	14%	43%	14%	29%
Social and cultural opportunities	29%	14%	57%	0%
Retail shopping opportunities	43%	29%	14%	14%
Quality educational system (K-12)	14%	14%	29%	43%
Access within 30 minutes to college or university	43%	29%	0%	29%
Availability of quality healthcare	0%	14%	57%	29%
Availability of public safety services (e.g. police, fire station)	0%	14%	43%	43%
Climate	14%	29%	29%	29%
Ease of attracting skilled workers	0%	0%	0%	0%

Sector 31-33—Manufacturing^T

The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The assembling of component parts of manufactured products is considered manufacturing, except in cases where the activity is appropriately classified in Sector 23, Construction.

Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public

products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

The materials, substances, or components transformed by manufacturing establishments are raw materials that are products of agriculture, forestry, fishing, mining, or quarrying as well as products of other manufacturing establishments. The materials used may be purchased directly from producers, obtained through customary trade channels, or secured without recourse to the market by transferring the product from one establishment to another, under the same ownership.

The new product of a manufacturing establishment may be finished in the sense that it is ready for utilization or consumption, or it may be semi-finished to become an input for an establishment engaged in further manufacturing. For example, the product of the alumina refinery is the input used in the primary production of aluminum; primary aluminum is the input to an aluminum wire drawing plant; and aluminum wire is the input for a fabricated wire product manufacturing establishment.

The subsectors in the Manufacturing sector generally reflect distinct production processes related to material inputs, production equipment, and employee skills. In the machinery area, where assembling is a key activity, parts and accessories for manufactured products are classified in the industry of the finished manufactured item when they are made for separate sale. For example, a replacement refrigerator door would be classified with refrigerators and an attachment for a piece of metal working machinery would be classified with metal working machinery. However, components, input from other manufacturing establishments, are classified based on the production function of the component manufacturer. For example, electronic components are classified in Subsector 334, Computer and Electronic Product Manufacturing and stampings are classified in Subsector 332, Fabricated Metal Product Manufacturing.

Manufacturing establishments often perform one or more activities that are classified outside the Manufacturing sector of NAICS. For instance, almost all manufacturing has some captive research and development or administrative operations, such as accounting, payroll, or management. These captive services are treated the same as captive manufacturing activities. When the services are provided by separate establishments, they are classified to the NAICS sector where such services are primary, not in manufacturing.

The boundaries of manufacturing and the other sectors of the classification system can be somewhat blurry. The establishments in the manufacturing sector are engaged in the transformation of materials into new products. Their output is a new product. However, the definition of what constitutes a new product can be somewhat subjective. As clarification, the following activities are considered manufacturing in NAICS:

Milk bottling and pasteurizing;
Water bottling and processing;
Fresh fish packaging (oyster shucking,

Grinding of lenses to prescription;
Wood preserving;
Electroplating, plating, metal heat

fish filleting);	treating, and polishing for the trade;
Apparel jobbing (assigning of materials	Lapidary work for the trade; to contract
factories or shops for	Fabricating signs and advertising displays; fabrication or
other contract operations)	Rebuilding or remanufacturing
as well as contracting on materials owned by others;	machinery (i.e., automotive parts);
Printing and related activities;	Ship repair and renovation;
Ready-mixed concrete production;	Machine shops; and Leather
converting;	Tire retreading.

Conversely, there are activities that are sometimes considered manufacturing, but which for NAICS are classified in another sector (i.e., not classified as manufacturing). They include:

1. Logging, classified in Sector 11, Agriculture, Forestry, Fishing and Hunting, is considered a harvesting operation;
2. The beneficiating of ores and other minerals, classified in Sector 21, Mining, Quarrying, and Oil and Gas Extraction, is considered part of the activity of mining;
3. The construction of structures and fabricating operations performed at the site of construction by contractors, is classified in Sector 23, Construction;
4. Establishments engaged in breaking of bulk and redistribution in smaller lots, including packaging, repackaging, or bottling products, such as liquors or chemicals; the customized assembly of computers; sorting of scrap; mixing paints to customer order; and cutting metals to customer order, classified in Sector 42, Wholesale Trade or Sector
5. 44-45, Retail Trade, produce a modified version of the same product, not a new product; and
6. Publishing and the combined activity of publishing and printing, classified in Sector 51, Information, perform the transformation of information into a product whereas the value of the product to the consumer lies in the information content, not in the format in which it is distributed (i.e., the book or software diskette).

312 Beverage and Tobacco Product Manufacturing^T

Industries in the Beverage and Tobacco Product Manufacturing subsector manufacture beverages and tobacco products. The industry group, Beverage Manufacturing, includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those

that produce distilled alcoholic beverages. Ice manufacturing, while not a beverage, is included with nonalcoholic beverage manufacturing because it uses the same production process as water purification.

In the case of activities related to the manufacture of beverages, the structure follows the defined production processes. Brandy, a distilled beverage, was not placed under distillery product manufacturing, but rather under the NAICS class for winery product manufacturing since the production process used in the manufacturing of alcoholic grape-based beverages produces both wines (fermented beverage) and brandies (distilled beverage).

The industry group, Tobacco Manufacturing, includes two types of establishments: (1) those engaged in redrying and stemming tobacco and, (2) those that manufacture tobacco products, such as cigarettes and cigars.

3121 Beverage Manufacturing^T

31211 Soft Drink and Ice Manufacturing^T

This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing soft drinks; (2) manufacturing ice; and (3) purifying and bottling water.

Cross-References. Establishments primarily engaged in--

- Canning fruit and vegetable juices--are classified in Industry 31142, Fruit and Vegetable Canning, Pickling, and Drying;
- Manufacturing soft drink bases--are classified in Industry 31193, Flavoring Syrup and Concentrate Manufacturing;
- Manufacturing nonalcoholic cider--are classified in Industry 31194, Seasoning and Dressing Manufacturing;
- Manufacturing dry ice--are classified in Industry 32512, Industrial Gas Manufacturing;
- Manufacturing milk-based drinks--are classified in Industry 31151, Dairy Product (except Frozen) Manufacturing;
- Manufacturing nonalcoholic beers--are classified in Industry 31212, Breweries;
- Manufacturing nonalcoholic wines--are classified in Industry 31213, Wineries; and
- Bottling purchased purified water--are classified in Industry 42449, Other Grocery and Related Products Merchant Wholesalers.

312111 Soft Drink Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing soft drinks and artificially carbonated waters.

Cross-References. Establishments primarily engaged in--

- Canning fruit and vegetable juices--are classified in U.S. Industry 311421, Fruit and Vegetable Canning;
- Manufacturing fruit syrups for flavoring--are classified in Industry 311930, Flavoring Syrup and Concentrate Manufacturing;
- Manufacturing nonalcoholic cider--are classified in U.S. Industry 311941, Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing;
- Purifying and bottling water (except artificially carbonated and flavored water)--are classified in U.S. Industry 312112, Bottled Water Manufacturing;
- Manufacturing milk-based drinks--are classified in U.S. Industry 311511, Fluid Milk Manufacturing; □
Manufacturing nonalcoholic beers--are classified in Industry 312120, Breweries; and □ Manufacturing nonalcoholic wines--are classified in Industry 312130, Wineries.

312112 Bottled Water Manufacturing

This U.S. industry comprises establishments primarily engaged in purifying and bottling water (including naturally carbonated).

Cross-References. Establishments primarily engaged in--

- Manufacturing artificially carbonated waters--are classified in U.S. Industry 312111, Soft Drink Manufacturing; and
- Bottling purchased purified water--are classified in Industry 424490, Other Grocery and Related Products Merchant Wholesalers.

312113 Ice Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing ice.

Cross-References.

Establishments primarily engaged in manufacturing dry ice are classified in Industry 325120, Industrial Gas Manufacturing.

31212 Breweries^T

See industry description for 312120 below.

312120 Breweries

This industry comprises establishments primarily engaged in brewing beer, ale, malt liquors, and nonalcoholic beer.

Cross-References. Establishments primarily engaged in--

- Bottling purchased malt beverages--are classified in Industry 424810, Beer and Ale Merchant Wholesalers; and □ Manufacturing malt--are classified in U.S. Industry 311213, Malt Manufacturing.

31213 Wineries^T

See industry description for 312130 below.

312130 Wineries

This industry comprises establishments primarily engaged in one or more of the following: (1) growing grapes and manufacturing wines and brandies; (2) manufacturing wines and brandies from grapes and other fruits grown elsewhere; and (3) blending wines and brandies.

Cross-References.

Establishments primarily engaged in bottling purchased wines are classified in Industry 424820, Wine and Distilled Alcoholic Beverage Merchant Wholesalers.

31214 Distilleries^T

See industry description for 312140 below.

312140 Distilleries

This industry comprises establishments primarily engaged in one or more of the following: (1) distilling potable liquors (except brandies); (2) distilling and blending liquors; and (3) blending and mixing liquors and other ingredients.

Cross-References. Establishments primarily engaged in--

- Manufacturing nonpotable ethyl alcohol--are classified in U.S. Industry 325193, Ethyl Alcohol Manufacturing;
- Bottling liquors made elsewhere--are classified in Industry 424820, Wine and Distilled Alcoholic Beverage Merchant Wholesalers; and
- Manufacturing brandies--are classified in Industry 312130, Wineries.

National Totals by Year					
NAICS 3121 - Beverage manufacturing					
2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)

Number of Establishments	4,841	4,961	6,130	6,619	7.98%	21.94%
Annual Payroll (\$1000)	6,476,807	6,781,175	7,410,020	7,955,518	7.36%	13.98%
Employees	131,438	136,139	146,421	156,635	6.98%	11.38%
Average Payroll Per Employee(\$)	49,276.52	49,810.67	50,607.63	50,790.17	0.36%	
	2.29%					
Average Employment Per Establishment	27.15	27.44	23.89	23.66	-0.93%	-7.93%

2014 Top 10 Producer States NAICS 3121 - Beverage manufacturing			
Annual Payroll		Establishments	
	(\$1,000)		Paid Employees
Total U.S.	7,955,518	6,619	156,635
California	2,422,641	1,728	42,289
Texas	541,545		
354			10,057
Pennsylvania	337,817	220	6,786
Florida	317,183		
176			6,327
New York	315,620	339	6,696
Colorado	260,992		
224			4,816
Washington	250,975	454	5,696
Ohio	233,603		
141			4,743
Kentucky	216,925	78	4,017
Virginia	209,770		
186			4,272
Subtotal	5,107,071	3,900	95,699
% of U.S.	64.20%	58.92%	61.10%

2014 Top Western Producer States NAICS 3121 - Beverage manufacturing			
Annual Payroll		Establishments	
	(\$1,000)		Paid Employees
Total U.S.	\$7,955,518		
6,619			156,635
Alaska	13,954	30	345
Arizona	105,098	68	2,439
California	2,422,641	1,728	42,289
Colorado	260,992	224	4,816
Hawaii	35,339	27	775

Idaho	15,647	43	491
Montana	20,979	68	779
Nevada	NR	29	NR
New Mexico	11,673	44	374
Oregon	181,009	363	4,620
Utah	28,408	31	701
Washington	250,975	454	5,696
Wyoming	NR	21	NR
Subtotal	3,346,715	3,130	63,325
% of U.S.	42.07%	47.29%	40.43%

NAICS 3121 - Beverage Manufacturing				N = 5
Physical Infrastructure	Not			
	Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	40%	40%	20%	0%

Access within 30 minutes to package freight services	80%	0%	0%	20%
Immediate access to a railhead or rail spur	80%	20%	0%	0%
Access within 30 minutes to rail freight	80%	20%	0%	0%
Access within 30 minutes to passenger air services	100%	0%	0%	0%
Access within 30 minutes to port or harbor facilities	80%	20%	0%	0%
Access within 30 minutes to an international trade port	80%	20%	0%	0%
Access to natural gas pipeline	100%	0%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need	40%	0%	40%	20%
Access within one day, at a reasonable cost, to your customers	0%	40%	20%	40%
Access to 3-phase electric power	40%	20%	20%	20%
Access to fiber optic lines	40%	0%	40%	20%
Availability of high-volume water supply	60%	20%	20%	0%
Availability of high-volume wastewater disposal	60%	20%	20%	0%
Availability of solid waste disposal	80%	20%	0%	0%
Availability of cell phone service	20%	0%	40%	40%
Availability of local public transportation	60%	20%	20%	0%
Possibility for future expansion at site	40%	40%	20%	0%
Availability of high-speed internet	20%	0%	60%	20%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

Economic Infrastructure	Not			
	Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	40%	40%	20%	0%
Availability of skilled workforce	20%	60%	0%	20%
Availability of technical workforce	20%	40%	40%	0%
Availability of unskilled workforce	40%	20%	20%	20%
Favorable local labor costs	20%	20%	40%	20%
Favorable worker's compensation tax rate	20%	40%	40%	0%
Favorable local business tax rates	20%	40%	40%	0%
Favorable state and local government incentives	80%	20%	0%	0%
Availability of union labor	40%	20%	40%	0%

Availability of specialized job training programs	20%	60%	20%	0%
Availability of long and short term financing	20%	40%	40%	0%
Existence of a business/trade association	60%	0%	40%	0%
Lenient environmental regulations	40%	40%	20%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	20%	60%	20%
Availability of affordable housing	20%	20%	60%	0%
Clean air and water	0%	0%	80%	20%
High quality natural ecosystem	0%	20%	60%	20%
Outdoor recreation opportunities	20%	0%	80%	0%
Social and cultural opportunities	20%	20%	60%	0%
Retail shopping opportunities	60%	0%	40%	0%
Quality educational system (K-12)	0%	20%	80%	0%
Access within 30 minutes to college or university	20%	20%	60%	0%
Availability of quality healthcare	0%	0%	80%	20%
Availability of public safety services (e.g. police, fire station)	0%	20%	80%	0%
Climate	20%	20%	60%	0%
Ease of attracting skilled workers	0%	0%	0%	0%

325 Chemical Manufacturing^T

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, Quarrying, and Oil and Gas Extraction. 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 is 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.

3252 Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing^T

32521 Resin and Synthetic Rubber Manufacturing^T

This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing synthetic resins, plastics materials, and nonvulcanizable elastomers and mixing and blending resins on a custom basis; (2) manufacturing noncustomized synthetic resins; and (3) manufacturing synthetic rubber.

Cross-References. Establishments primarily engaged in--

- Manufacturing plastics resins and converting resins into plastics products--are classified in Industry Group 3261, Plastics Product Manufacturing;
- Processing natural, synthetic, or reclaimed rubber into intermediate or final products--are classified in Industry Group 3262, Rubber Product Manufacturing;

- Custom compounding resins made elsewhere--are classified in Industry 32599, All Other Chemical Product and Preparation Manufacturing; and
- Manufacturing resin adhesives--are classified in Industry 32552, Adhesive Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing plastics resins and converting the resins into plastics products--are classified in Industry Group 3261, Plastics Product Manufacturing;
- Custom compounding resins made elsewhere--are classified in U.S. Industry 325991, Custom Compounding of Purchased Resins; and
- Manufacturing plastics adhesives--are classified in Industry 325520, Adhesive Manufacturing.

325212 Synthetic Rubber Manufacturing

This U.S. industry consists of establishments primarily engaged in manufacturing synthetic rubber.

Cross-References. Establishments primarily engaged in--

- Processing natural, synthetic, or reclaimed rubber into intermediate or final products (except adhesives)-- are classified in Industry Group 3262, Rubber Product Manufacturing; and
- Manufacturing rubber adhesives--are classified in Industry 325520, Adhesive Manufacturing.

32522 Artificial and Synthetic Fibers and Filaments Manufacturing^T See industry description for 325220 below.

325220 Artificial and Synthetic Fibers and Filaments Manufacturing

This industry comprises establishments primarily engaged in (1) manufacturing cellulosic (e.g., rayon, acetate) and noncellulosic (e.g., nylon, polyolefin, polyester) fibers and filaments in the form of monofilament, filament yarn, staple, or tow or (2) manufacturing and texturing cellulosic and noncellulosic fibers and filaments.

Cross-References. Establishments primarily engaged in--

- Texturizing cellulosic and noncellulosic fiber and filament made elsewhere--are classified in Industry 313110, Fiber, Yarn, and Thread Mills; and
- Manufacturing textile glass fibers--are classified in U.S. Industry 327212, Other Pressed and Blown Glass and Glassware Manufacturing.

National Totals by Year						
NAICS 3252 - Resin, synthetic rubber, and artificial synthetic fibers and filaments manufacturing						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	1,288	1,431	1,404	1,418	1.00%	10.07%
Annual Payroll (\$1000)	5,937,370	6,301,764	6,313,054	6,918,308	9.59%	9.66%
Employees	86,201	91,629	92,212	95,122	3.16%	7.87%
Average Payroll Per Employee(\$)	68,878.20	68,774.78	68,462.39	72,730.89	6.23%	
	1.61%					
Average Employment Per Establishment	66.93	64.03	65.68	67.08	2.14%	-1.99%

2014 Top 10 Producer States			
NAICS 3252 - Resin, synthetic rubber, and artificial synthetic fibers and			
Annual Payroll			
	Establishments	Paid Employees	
(\$1,000)			
Total U.S.	6,918,308	1,418	95,122
Texas	1,721,439	137	16,178
Louisiana	420,066	28	3,927
South Carolina	408,692	42	7,528
Ohio	392,724	100	5,991
Illinois	314,712	84	4,359

Michigan	302,237	66	4,388
Kentucky	279,114	34	3,808
Alabama	277,413	25	4,826
New Jersey	247,938	40	2,589
North Carolina	233,325	72	4,490
Subtotal	4,597,660	628	58,084
% of U.S.	66.46%	44.29%	61.06%

2014 Top Western Producer States NAICS 3252 - Resin, synthetic rubber, and artificial synthetic fibers and Annual Payroll ((\$1,000)			
		Establishments	Paid Employees
Total U.S.	\$6,918,308	1,418	95,122
Alaska	NR	NR	NR
Arizona	15,086	14	NR
California	205,883	130	3,653
Colorado	3,953	9	63
Hawaii	NR	1	NR
Idaho	5,524	6	192
Montana	NR	2	NR
Nevada	4,844	6	104
New Mexico	NR	NR	NR
Oregon	24,680	19	365
Utah	8,978	11	231
Washington	8,030	13	183
Wyoming	NR	NR	NR
Subtotal	276,978	211	4,791
% of U.S.	4.00%	14.88%	5.04%

NAICS 3252 - Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing				N = 6
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	17%	17%	33%	33%
Access within 30 minutes to package freight services	33%	33%	0%	33%
Immediate access to a railhead or rail spur	67%	0%	0%	33%
Access within 30 minutes to rail freight	67%	0%	0%	33%
Access within 30 minutes to passenger air services	33%	33%	33%	0%
Access within 30 minutes to port or harbor facilities	50%	17%	0%	33%
Access within 30 minutes to an international trade port	67%	17%	0%	17%
Access to natural gas pipeline	50%	0%	17%	33%
Access within one day, at a reasonable cost, to the supplies you need	0%	0%	0%	83%
Access within one day, at a reasonable cost, to your customers	33%	0%	0%	67%
Access to 3-phase electric power	33%	0%	0%	50%

Access to fiber optic lines	33%	17%	0%	50%
Availability of high-volume water supply	50%	0%	0%	50%
Availability of high-volume wastewater disposal	33%	0%	33%	33%
Availability of solid waste disposal	33%	0%	17%	50%
Availability of cell phone service	17%	0%	0%	33%
Availability of local public transportation	33%	33%	0%	33%
Possibility for future expansion at site	17%	33%	17%	33%
Availability of high-speed internet	0%	0%	0%	100%
Access to ponds and streams	33%	17%	0%	0%
Availability of satellite transmission	17%	33%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	50%	0%	17%	33%
Availability of skilled workforce	33%	17%	0%	50%
Availability of technical workforce	33%	0%	33%	33%
Availability of unskilled workforce	33%	17%	17%	33%
Favorable local labor costs	33%	17%	17%	33%
Favorable worker's compensation tax rate	17%	17%	17%	50%
Favorable local business tax rates	0%	17%	17%	67%
Favorable state and local government incentives	33%	0%	0%	17%
Availability of union labor	17%	17%	0%	17%
Availability of specialized job training programs	67%	33%	0%	0%
Availability of long and short term financing	67%	33%	0%	0%
Existence of a business/trade association	50%	0%	0%	0%
Lenient environmental regulations	17%	17%	0%	17%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	17%	0%	33%	50%
Availability of affordable housing	17%	0%	33%	50%
Clean air and water	17%	17%	17%	50%
High quality natural ecosystem	17%	33%	17%	33%
Outdoor recreation opportunities	17%	50%	17%	17%
Social and cultural opportunities	17%	33%	33%	17%
Retail shopping opportunities	17%	33%	17%	33%
Quality educational system (K-12)	17%	17%	33%	33%
Access within 30 minutes to college or university	17%	33%	17%	33%
Availability of quality healthcare	17%	0%	33%	50%
Availability of public safety services (e.g. police, fire station)	17%	0%	17%	67%
Climate	17%	0%	0%	33%
Ease of attracting skilled workers	0%	0%	33%	17%

3254 Pharmaceutical and Medicine Manufacturing^T

32541 Pharmaceutical and Medicine Manufacturing^T

This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing biological and medicinal products; (2) processing (i.e., grading, grinding, and milling) botanical drugs and herbs; (3) isolating active medicinal principals from botanical drugs and herbs; and (4) manufacturing pharmaceutical products intended for internal and external consumption in such forms as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing packaged compounded medicinals and botanicals--are classified in U.S. Industry 325412, Pharmaceutical Preparation Manufacturing; and
- Manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except for diagnostic use)--are classified in U.S. Industry 325414, Biological Product (except Diagnostic) Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing uncompounded medicinal chemicals and their derivatives--are classified in U.S. Industry 325411, Medicinal and Botanical Manufacturing;
- Manufacturing in-vitro diagnostic substances--are classified in U.S. Industry 325413, In-Vitro Diagnostic Substance Manufacturing; and
- Manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except for diagnostic use)--are classified in U.S. Industry 325414, Biological Product (except Diagnostic) Manufacturing.

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.

Cross-References.

Establishments primarily engaged in manufacturing in-vivo diagnostic substances are classified in U.S. Industry 325412, Pharmaceutical Preparation Manufacturing.

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).

Cross-References. Establishments primarily engaged in--

- Manufacturing in-vitro diagnostic substances--are classified in U.S. Industry 325413, In-Vitro Diagnostic Substance Manufacturing; and
- Manufacturing pharmaceutical preparations (except biological and in-vitro diagnostic substances)--are classified in U.S. Industry 325412, Pharmaceutical Preparation Manufacturing.

National Totals by Year					
NAICS 3254 - Pharmaceutical and medicine manufacturing					
2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)

Number of Establishments	2,008	2,150	2,128	2,177	2.30%	7.15%
Annual Payroll (\$1000)	19,035,322	21,070,512	21,116,083	22,478,249	6.45%	13.24%
Employees	227,894	235,593	231,368	236,046	2.02%	2.83%
Average Payroll Per Employee(\$)	83,527.09	89,436.07	91,266.22	95,228.26	4.34%	
	10.12%					
Average Employment Per Establishment	113.49	109.58	108.73	108.43	-0.27%	-4.04%

2014 Top 10 Producer States			
NAICS 3254 - Pharmaceutical and medicine manufacturing			
Annual Payroll	Establishments	Paid Employees	
(\$1,000)			
Total U.S.	22,478,249	2,177	236,046
California	5,486,005	381	44,168
Illinois	2,930,676	66	20,370
New Jersey	1,618,159	141	13,739
New York	1,421,311	137	20,031
North Carolina	1,250,502	77	16,582
Pennsylvania	966,523	88	10,769
Massachusetts	874,655	83	9,016
Indiana	731,034	32	8,284
Michigan	552,222	49	8,022
Texas	424,136	107	7,288
Subtotal	16,255,223	1,161	158,269
% of U.S.	72.32%	53.33%	67.05%

2014 Top Western Producer States			
NAICS 3254 - Pharmaceutical and medicine manufacturing			
Annual Payroll	Establishments	Paid Employees	
(\$1,000)			
Total U.S.	\$22,478,249	2,177	236,046
Alaska	NR	NR	NR
Arizona	321,594	37	3,200
California	5,486,005	381	44,168
Colorado	325,685	63	3,394
Hawaii	NR	2	NR
Idaho	22,160	10	NR
Montana	6,605	8	275
Nevada	27,526	18	NR
New Mexico	45,973	11	836
Oregon	33,485	31	653
Utah	339,888	55	4,979
Washington	132,805	44	2,475
Wyoming	10,043	6	NR

Subtotal	6,751,769	666	59,980
% of U.S.	30.04%	30.59%	25.41%

NAICS 3254 - Pharmaceutical and Medicine Manufacturing				N = 7
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	0%	29%	14%	57%
Access within 30 minutes to package freight services	43%	14%	29%	14%
Immediate access to a railhead or rail spur	71%	14%	14%	0%
Access within 30 minutes to rail freight	86%	0%	14%	0%
Access within 30 minutes to passenger air services	43%	14%	14%	29%
Access within 30 minutes to port or harbor facilities	86%	0%	14%	0%
Access within 30 minutes to an international trade port	71%	14%	14%	0%
Access to natural gas pipeline	43%	0%	14%	43%
Access within one day, at a reasonable cost, to the supplies you need	14%	14%	29%	43%
Access within one day, at a reasonable cost, to your customers	29%	14%	14%	43%
Access to 3-phase electric power	0%	0%	29%	71%
Access to fiber optic lines	14%	29%	43%	14%
Availability of high-volume water supply	14%	0%	43%	43%
Availability of high-volume wastewater disposal	29%	14%	14%	43%
Availability of solid waste disposal	43%	14%	43%	0%
Availability of cell phone service	14%	0%	14%	14%
Availability of local public transportation	14%	29%	43%	14%
Possibility for future expansion at site	0%	0%	100%	0%
Availability of high-speed internet	0%	0%	29%	57%
Access to ponds and streams	57%	0%	0%	0%
Availability of satellite transmission	29%	14%	14%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	14%	29%	43%	14%
Availability of skilled workforce	14%	14%	43%	29%
Availability of technical workforce	29%	0%	57%	14%
Availability of unskilled workforce	43%	0%	43%	14%
Favorable local labor costs	14%	0%	71%	14%
Favorable worker's compensation tax rate	14%	14%	71%	0%
Favorable local business tax rates	14%	29%	43%	14%
Favorable state and local government incentives	29%	14%	0%	0%
Availability of union labor	0%	0%	43%	0%
Availability of specialized job training programs	43%	29%	29%	0%
Availability of long and short term financing	29%	43%	29%	0%
Existence of a business/trade association	14%	29%	0%	0%
Lenient environmental regulations	14%	0%	29%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	29%	0%	71%	0%
Availability of affordable housing	0%	14%	71%	14%
Clean air and water	14%	14%	71%	0%

High quality natural ecosystem	29%	14%	57%	0%
Outdoor recreation opportunities	43%	29%	29%	0%
Social and cultural opportunities	29%	29%	43%	0%
Retail shopping opportunities	29%	43%	29%	0%
Quality educational system (K-12)	29%	14%	57%	0%
Access within 30 minutes to college or university	43%	14%	29%	14%
Availability of quality healthcare	14%	29%	43%	14%
Availability of public safety services (e.g. police, fire station)	14%	14%	43%	29%
Climate	0%	29%	14%	0%
Ease of attracting skilled workers	14%	0%	14%	29%

334 Computer and Electronic Product Manufacturing^T

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 assists 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.

3345 Navigational, Measuring, Electromedical, and Control Instruments Manufacturing^T

33451 Navigational, Measuring, Electromedical, and Control Instruments Manufacturing^T

This industry comprises establishments primarily engaged in manufacturing navigational, measuring, electromedical, and control instruments. Examples of products made by these establishments are aeronautical instruments, appliance regulators and controls (except switches), laboratory analytical instruments, navigation and guidance systems, and physical properties testing equipment.

Cross-References. Establishments primarily engaged in--

- Manufacturing global positioning system (GPS) equipment--are classified in Industry 33422, Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing;
- Manufacturing motor control switches and relays (including timing relays)--are classified in Industry 33531, Electrical Equipment Manufacturing;
- Manufacturing switches for appliances--are classified in Industry 33593, Wiring Device Manufacturing;
- Manufacturing optical instruments--are classified in Industry 33331, Commercial and Service Industry Machinery Manufacturing;

- Manufacturing glass watch and clock crystals--are classified in Industry 32721, Glass and Glass Product Manufacturing;
- Manufacturing plastics watch and clock crystals--are classified in Industry 32619, Other Plastics Product Manufacturing; and
- Manufacturing medical thermometers and other nonelectrical medical apparatus--are classified in Industry Group 3391, Medical Equipment and Supplies Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing medical irradiation apparatus--are classified in U.S. Industry 334517, Irradiation Apparatus Manufacturing; and
- Manufacturing nonelectrical medical and therapeutic apparatus--are classified in Industry Group 3391, Medical Equipment and Supplies Manufacturing.

334511 Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments. Examples of products made by these establishments are aircraft instruments (except engine), flight recorders, navigational instruments and systems, radar systems and equipment, and sonar systems and equipment.

Cross-References. Establishments primarily engaged in--

- Manufacturing global positioning system (GPS) equipment--are classified in Industry 334220, Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing; and
- Manufacturing aircraft engine instruments and meteorological systems and equipment--are classified in U.S. Industry 334519, Other Measuring and Controlling Device Manufacturing.

334512 Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use

This U.S. industry comprises establishments primarily engaged in manufacturing automatic controls and regulators for applications, such as heating, air-conditioning, refrigeration and appliances.

Cross-References. Establishments primarily engaged in--

- Manufacturing industrial process controls--are classified in U.S. Industry 334513, Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables;
- Manufacturing motor control switches and relays--are classified in U.S. Industry 335314, Relay and Industrial Control Manufacturing;
- Manufacturing switches for appliances--are classified in U.S. Industry 335931, Current-Carrying Wiring Device Manufacturing; and
- Manufacturing appliance timers--are classified in U.S. Industry 334519, Other Measuring and Controlling Device Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing instruments for measuring or testing of electricity and electrical signals--are classified in U.S. Industry 334515, Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals;
- Manufacturing medical thermometers--are classified in U.S. Industry 339112, Surgical and Medical Instrument Manufacturing;
- Manufacturing glass hydrometers and thermometers for other nonmedical uses--are classified in U.S. Industry 334519, Other Measuring and Controlling Device Manufacturing;
- Manufacturing instruments and instrumentation systems for laboratory analysis of samples--are classified in U.S. Industry 334516, Analytical Laboratory Instrument Manufacturing; and
- Manufacturing optical alignment and display instruments, optical comparators, and optical test and inspection equipment--are classified in U.S. Industry 333314, Optical Instrument and Lens Manufacturing.

334514 Totalizing Fluid Meter and Counting Device Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing totalizing (i.e., registering) fluid meters and counting devices. Examples of products made by these establishments are gas consumption meters, water consumption meters, parking meters, taxi meters, motor vehicle gauges, and fare collection equipment.

Cross-References. Establishments primarily engaged in--

- Manufacturing integrating meters and counters for measuring the characteristics of electricity and electrical signals--are classified in U.S. Industry 334515, Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals; and
- Manufacturing instruments and devices that measure, display, or control (i.e., monitor or analyze) related industrial process variables--are classified in U.S. Industry 334513, Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables.

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, voltmeters, ohm meters, wattmeters, multimeters, and semiconductor test equipment.

Cross-References.

Establishments primarily engaged in manufacturing electronic monitoring, evaluating, and other electronic support equipment for navigational, radar, and sonar systems are classified in U.S. Industry 334511, Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing instruments for monitoring and analyzing continuous samples from medical patients--are classified in U.S. Industry 334510, Electromedical and Electrotherapeutic Apparatus Manufacturing; and
- Manufacturing instruments and related devices that measure, display, or control (i.e., monitor or analyze) industrial process variables--are classified in U.S. Industry 334513, Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables.

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.

334519 Other Measuring and Controlling Device Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing measuring and controlling devices (except search, detection, navigation, guidance, aeronautical, and nautical instruments and systems; automatic environmental controls for residential, commercial, and appliance use; instruments for measurement, display, and control of industrial process variables; totalizing fluid meters and counting devices; instruments for measuring and testing electricity and electrical signals; analytical laboratory instruments; irradiation equipment; and electromedical and electrotherapeutic apparatus).

Illustrative Examples:

Aircraft engine instruments manufacturing
Automotive emissions testing equipment manufacturing
Clocks assembling
Meteorological instruments manufacturing
Physical properties testing and inspection equipment manufacturing
Polygraph machines manufacturing
Radiation detection and monitoring instruments manufacturing
Surveying instruments manufacturing
Thermometers, liquid-in-glass and bimetal types (except medical), manufacturing Watches and parts (except crystals) manufacturing

Cross-References. Establishments primarily engaged in--

- Manufacturing medical thermometers--are classified in U.S. Industry 339112, Surgical and Medical Instrument Manufacturing;
- Manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments-- are classified in U.S. Industry 334511, Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing;

- Manufacturing automatic controls and regulators for applications, such as heating, air-conditioning, refrigeration and appliances--are classified in U.S. Industry 334512, Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use;
- Manufacturing instruments and related devices that measure, display, or control (i.e., monitor or analyze) industrial process variables--are classified in U.S. Industry 334513, Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables;
- Manufacturing totalizing (i.e., registering) fluid meters and counting devices, including motor vehicle gauges--are classified in U.S. Industry 334514, Totalizing Fluid Meter and Counting Device Manufacturing;
- Manufacturing instruments for measuring and testing the characteristics of electricity and electrical signals--are classified in U.S. Industry 334515, Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals;
- Manufacturing instruments for laboratory analysis of the physical composition or concentration of samples of solid, fluid, gaseous, or composite materials--are classified in U.S. Industry 334516, Analytical Laboratory Instrument Manufacturing;
- Manufacturing X-ray apparatus, tubes, or related irradiation apparatus--are classified in U.S. Industry 334517, Irradiation Apparatus Manufacturing;
- Manufacturing electromedical and electrotherapeutic apparatus--are classified in U.S. Industry 334510, Electromedical and Electrotherapeutic Apparatus Manufacturing;
- Manufacturing glass watch and clock crystals--are classified in Industry 32721, Glass and Glass Product Manufacturing;
- Manufacturing plastics watch and clock crystals--are classified in U.S. Industry 326199, All Other Plastics Product Manufacturing; and
- Manufacturing timing relays--are classified in U.S. Industry 335314, Relay and Industrial Control Manufacturing.

National Totals by Year						
NAICS 3345 - Navigational, measuring, electromedical, and control instruments manufacturing						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	5,116	5,339	5,239	5,257	0.34%	3.17%
Annual Payroll (\$1000)	30,966,722	32,227,948	32,261,202	32,825,374	1.75%	4.75%
Employees	387,498	386,265	389,281	385,797	-0.89%	-0.10%
Average Payroll Per Employee(\$)	79,914.53	83,434.81	82,873.82	85,084.58	2.67%	
	4.86%					
Average Employment Per Establishment	75.74	72.35	74.30	73.39	-1.23%	-3.16%

2014 Top 10 Producer States			
NAICS 3345 - Navigational, measuring, electromedical, and control			
Annual Payroll			
	Establishments	Paid Employees	
(\$1,000)			
Total U.S.	32,825,374	5,257	385,797
California	6,379,194	975	62,168
Texas	2,545,684	389	30,741
Massachusetts	2,543,196	313	27,035
Minnesota	1,732,506	137	21,355
Florida	1,392,901	254	17,717
Pennsylvania	1,370,217	262	17,426

New York	1,232,126	249	15,418
New Jersey	1,202,476	186	13,835
Maryland	1,150,305	82	11,096
Ohio	1,117,166	227	14,509
Subtotal	20,665,771	3,074	231,300
% of U.S.	62.96%	58.47%	59.95%

2014 Top Western Producer States NAICS 3345 - Navigational, measuring, electromedical, and control Annual Payroll Establishments Paid Employees (\$1,000)			
Total U.S.	\$32,825,374	5,257	385,797
Alaska	NR	3	NR
Arizona	562,689	102	7,086
California	6,379,194	975	62,168
Colorado	539,261	127	6,355
Hawaii	NR	4	NR
Idaho	19,356	14	457
Montana	NR	11	NR
Nevada	79,719	29	1,204
New Mexico	124,603	33	1,525
Oregon	479,894	94	6,466
Utah	668,944	59	7,949
Washington	727,653	165	8,887
Wyoming	13,455	6	227
Subtotal	9,594,768	1,622	102,324
% of U.S.	29.23%	30.85%	26.52%

NAICS 3345 - Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	Physical Infrastructure			N = 13 Very Important
	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	15%	23%	8%	54%
Access within 30 minutes to package freight services	15%	31%	23%	31%
Immediate access to a railhead or rail spur	85%	8%	0%	8%
Access within 30 minutes to rail freight	77%	15%	0%	8%
Access within 30 minutes to passenger air services	31%	38%	8%	23%
Access within 30 minutes to port or harbor facilities	62%	23%	15%	0%
Access within 30 minutes to an international trade port	54%	15%	23%	8%
Access to natural gas pipeline	69%	23%	8%	0%
Access within one day, at a reasonable cost, to the supplies you need	8%	31%	15%	46%
Access within one day, at a reasonable cost, to your customers	31%	15%	15%	38%
Access to 3-phase electric power	15%	8%	15%	62%
Access to fiber optic lines	31%	38%	15%	15%

Availability of high-volume water supply	69%	8%	23%	0%
Availability of high-volume wastewater disposal	69%	8%	15%	8%
Availability of solid waste disposal	54%	8%	31%	8%
Availability of cell phone service	8%	0%	0%	23%
Availability of local public transportation	46%	46%	8%	0%
Possibility for future expansion at site	15%	38%	23%	23%
Availability of high-speed internet	0%	8%	15%	62%
Access to ponds and streams	54%	8%	8%	0%
Availability of satellite transmission	23%	8%	31%	8%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	15%	15%	54%	15%
Availability of skilled workforce	8%	23%	31%	38%
Availability of technical workforce	15%	15%	15%	54%
Availability of unskilled workforce	8%	38%	31%	23%
Favorable local labor costs	15%	15%	38%	31%
Favorable worker's compensation tax rate	8%	23%	46%	23%
Favorable local business tax rates	0%	15%	46%	38%
Favorable state and local government incentives	31%	0%	0%	0%
Availability of union labor	8%	15%	0%	8%
Availability of specialized job training programs	62%	23%	15%	0%
Availability of long and short term financing	38%	31%	0%	31%
Existence of a business/trade association	31%	0%	0%	0%
Lenient environmental regulations	23%	8%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	15%	8%	54%	23%
Availability of affordable housing	8%	15%	62%	15%
Clean air and water	0%	31%	54%	15%
High quality natural ecosystem	8%	38%	38%	15%
Outdoor recreation opportunities	8%	38%	38%	8%
Social and cultural opportunities	8%	46%	31%	15%
Retail shopping opportunities	23%	31%	38%	8%
Quality educational system (K-12)	0%	15%	54%	31%
Access within 30 minutes to college or university	23%	0%	62%	15%
Availability of quality healthcare	0%	15%	46%	38%
Availability of public safety services (e.g. police, fire station)	8%	0%	31%	62%
Climate	0%	8%	23%	0%
Ease of attracting skilled workers	0%	0%	23%	46%

335 Electrical Equipment, Appliance, and Component Manufacturing^T

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).

3353 Electrical Equipment Manufacturing^T

33531 Electrical Equipment Manufacturing^T

This industry comprises establishments primarily engaged in manufacturing power, distribution, and specialty transformers; electric motors, generators, and motor generator sets; switchgear and switchboard apparatus; relays; and industrial controls.

Cross-References. Establishments primarily engaged in--

- Manufacturing turbine generator set units and electric outboard motors--are classified in Industry 33361, Engine, Turbine, and Power Transmission Equipment Manufacturing;
- Manufacturing electronic component-type transformers and switches--are classified in Industry 33441, Semiconductor and Other Electronic Component Manufacturing;
- Manufacturing environmental controls and industrial process control instruments--are classified in Industry 33451, Navigational, Measuring, Electromedical, and Control Instruments Manufacturing;
- Manufacturing switches for electrical circuits, such as pushbutton and snap switches--are classified in Industry 33593, Wiring Device Manufacturing;
- Manufacturing complete welding and soldering equipment--are classified in Industry 33399, All Other General Purpose Machinery Manufacturing; and
- Manufacturing starting motors and generators for internal combustion engines--are classified in Industry 33632, Motor Vehicle Electrical and Electronic Equipment Manufacturing.

335311 Power, Distribution, and Specialty Transformer Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing power, distribution, and specialty transformers (except electronic components). Industrial-type and consumer-type transformers in this industry vary (e.g., step up or step down) voltage but do not convert alternating to direct or direct to alternating current.

Illustrative Examples:

Distribution transformers, electric, manufacturing
Fluorescent ballasts (i.e., transformers) manufacturing
Substation transformers, electric power distribution, manufacturing Transmission
and distribution voltage regulators manufacturing

Cross-References.

Establishments primarily engaged in manufacturing electronic component-type transformers are classified in U.S. Industry 334416, Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing.

335312 Motor and Generator Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing electric motors (except internal combustion engine starting motors), power generators (except battery charging alternators for internal combustion engines), and motor generator sets (except turbine generator set units). This industry includes establishments rewinding armatures on a factory basis.

Cross-References. Establishments primarily engaged in--

- Manufacturing electric outboard motors--are classified in U.S. Industry 333618, Other Engine Equipment Manufacturing;
- Manufacturing gas, steam, or hydraulic turbine generator set units--are classified in U.S. Industry 333611, Turbine and Turbine Generator Set Units Manufacturing;
- Manufacturing starting motors and battery charging alternators for internal combustion engines--are classified in Industry 336320, Motor Vehicle Electrical and Electronic Equipment Manufacturing;
- Rewinding armatures, not on a factory basis--are classified in Industry 811310, Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance; and
- Manufacturing complete welding and soldering equipment--are classified in U.S. Industry 333992, Welding and Soldering Equipment Manufacturing.

335313 Switchgear and Switchboard Apparatus Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing switchgear and switchboard apparatus.

Illustrative Examples:

Circuit breakers, power, manufacturing
 Control panels, electric power distribution, manufacturing
 Duct for electrical switchboard apparatus manufacturing
 Fuses, electric, manufacturing
 Power switching equipment manufacturing
 Switches, electric power (except pushbutton, snap, solenoid, tumbler), manufacturing

Cross-References. Establishments primarily engaged in--

- Manufacturing relays--are classified in U.S. Industry 335314, Relay and Industrial Control Manufacturing;
- Manufacturing switches for electronic applications--are classified in U.S. Industry 334419, Other Electronic Component Manufacturing; and
- Manufacturing snap, pushbutton, and similar switches for electrical circuits--are classified in U.S. Industry 335931, Current-Carrying Wiring Device Manufacturing.

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.

Cross-References. Establishments primarily engaged in--

- Manufacturing environmental and appliance control equipment--are classified in U.S. Industry 334512, Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use; and
- Manufacturing instruments for controlling industrial process variables--are classified in U.S. Industry 334513, Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables.

	National Totals by Year					
	NAICS 3353 - Electrical equipment manufacturing					
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	2,190	2,211	2,192	2,158	-1.55%	-0.14%

Annual Payroll (\$1000)	6,160,155	6,513,758	6,528,607	6,857,999	5.05%	7.68%
Employees	111,656	115,904	115,704	117,228	1.32%	4.14%
Average Payroll Per Employee(\$)	55,170.84	56,199.60		58,501.37	3.68%	3.39%
	56,425.08					
Average Employment Per Establishment	50.98	52.42	52.78	54.32	2.91%	4.30%

2014 Top 10 Producer States			
NAICS 3353 - Electrical equipment manufacturing			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	6,857,999	2,158	117,228
Wisconsin	684,480	95	10,763
California	586,524	225	8,771
Texas	533,055	162	8,602
Illinois	424,670	125	6,990
Virginia	374,768	52	5,597
Minnesota	370,733	69	5,744
Ohio	303,394	135	5,881
North Carolina	299,237	54	6,062
Pennsylvania	290,606	112	4,815
Missouri	230,533	55	4,106
Subtotal	4,098,000	1,084	67,331
% of U.S.	59.76%	50.23%	57.44%

2014 Top Western Producer States			
NAICS 3353 - Electrical equipment manufacturing			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	\$6,857,999	2,158	117,228
Alaska	NR	1	NR
Arizona	47,962	21	584
California	586,524	225	8,771
Colorado	33,051	32	506
Hawaii	NR	NR	NR
Idaho	19,724	12	458
Montana	NR	1	NR
Nevada	8,380	12	237
New Mexico	NR	8	NR
Oregon	66,851	28	905
Utah	6,564	14	133
Washington	44,230	34	645
Wyoming	NR	1	NR

Subtotal	813,286	389	12,239
% of U.S.	11.86%	18.03%	10.44%

NAICS 3353 - Electrical Equipment Manufacturing				N = 10
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	10%	10%	40%	30%
Access within 30 minutes to package freight services	10%	10%	50%	30%
Immediate access to a railhead or rail spur	70%	20%	0%	0%
Access within 30 minutes to rail freight	50%	30%	10%	0%
Access within 30 minutes to passenger air services	20%	10%	30%	40%
Access within 30 minutes to port or harbor facilities	70%	10%	10%	0%
Access within 30 minutes to an international trade port	70%	10%	10%	0%
Access to natural gas pipeline	40%	20%	20%	10%
Access within one day, at a reasonable cost, to the supplies you need	20%	10%	40%	30%
Access within one day, at a reasonable cost, to your customers	30%	20%	0%	50%
Access to 3-phase electric power	20%	0%	30%	50%
Access to fiber optic lines	20%	60%	0%	10%
Availability of high-volume water supply	60%	20%	10%	0%
Availability of high-volume wastewater disposal	60%	20%	10%	0%
Availability of solid waste disposal	80%	0%	10%	0%
Availability of cell phone service	10%	0%	10%	10%
Availability of local public transportation	40%	40%	10%	10%
Possibility for future expansion at site	20%	40%	30%	10%
Availability of high-speed internet	0%	10%	10%	60%
Access to ponds and streams	60%	0%	0%	0%
Availability of satellite transmission	40%	20%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	40%	30%	10%	20%
Availability of skilled workforce	10%	50%	30%	0%
Availability of technical workforce	10%	40%	40%	10%
Availability of unskilled workforce	50%	30%	10%	10%
Favorable local labor costs	10%	20%	40%	30%
Favorable worker's compensation tax rate	0%	30%	60%	10%
Favorable local business tax rates	0%	20%	50%	30%
Favorable state and local government incentives	30%	0%	0%	0%
Availability of union labor	10%	10%	20%	0%
Availability of specialized job training programs	20%	60%	10%	10%
Availability of long and short term financing	50%	30%	10%	10%
Existence of a business/trade association	10%	10%	0%	10%
Lenient environmental regulations	20%	0%	10%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	20%	20%	50%	10%

Availability of affordable housing	10%	30%	40%	20%
Clean air and water	10%	20%	40%	30%
High quality natural ecosystem	20%	30%	20%	30%
Outdoor recreation opportunities	20%	70%	10%	0%
Social and cultural opportunities	30%	30%	40%	0%
Retail shopping opportunities	40%	30%	30%	0%
Quality educational system (K-12)	10%	10%	50%	30%
Access within 30 minutes to college or university	30%	20%	30%	20%
Availability of quality healthcare	20%	20%	40%	20%
Availability of public safety services (e.g. police, fire station)	10%	0%	60%	30%
Climate	0%	20%	10%	10%
Ease of attracting skilled workers	10%	20%	20%	10%

Sector 42--Wholesale Trade [†]

The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale (i.e., goods sold to other wholesalers or retailers), (b) capital or durable nonconsumer goods, and (c) raw and intermediate materials and supplies used in production.

Wholesalers sell merchandise to other businesses and normally operate from a warehouse or office. These warehouses and offices are characterized by having little or no display of merchandise. In addition, neither the design nor the location of the premises is intended to solicit walk-in traffic. Wholesalers do not normally use advertising directed to the general public. Customers are generally reached initially via telephone, in-person marketing, or by specialized advertising that may include Internet and other electronic means. Follow-up orders are either vendor-initiated or client-initiated, generally based on previous sales, and typically exhibit strong ties between sellers and buyers. In fact, transactions are often conducted between wholesalers and clients that have long-standing business relationships.

This sector comprises two main types of wholesalers: merchant wholesalers that sell goods on their own account and business-to-business electronic markets, agents, and brokers that arrange sales and purchases for others generally for a commission or fee.

(1) Establishments that sell goods on their own account are known as wholesale merchants, distributors, jobbers, drop shippers, and import/export merchants. Also included as wholesale merchants are sales offices and sales branches (but not retail stores) maintained by manufacturing, refining, or mining enterprises apart from their plants or mines for the purpose of marketing their products and group purchasing organizations (e.g., purchasing and selling goods on their own account). Merchant wholesale establishments typically maintain their own warehouse, where they receive and handle goods for their customers. Goods are generally sold without transformation, but may include integral functions, such as sorting, packaging, labeling, and other marketing services.

(2) Establishments arranging for the purchase or sale of goods owned by others or purchasing goods, generally on a commission basis are known as business-to-business electronic markets, agents and brokers, commission merchants, import/export agents and brokers, auction companies, group purchasing organization (e.g., purchasing or arranging for the purchases of goods owned by others), and manufacturers' representatives. These establishments operate from offices and generally do not own or handle the goods they sell.

Some wholesale establishments may be connected with a single manufacturer and promote and sell the particular manufacturers' products to a wide range of other wholesalers or retailers. Other wholesalers may be connected to a retail

chain, or limited number of retail chains, and only provide a variety of products needed by that particular retail operation(s). These wholesalers may obtain the products from a wide range of manufacturers. Still other wholesalers may not take title to the goods, but act as agents and brokers for a commission.

Although, in general, wholesaling normally denotes sales in large volumes, durable nonconsumer goods may be sold in single units. Sales of capital or durable nonconsumer goods used in the production of goods and services, such as farm machinery, medium- and heavy-duty trucks, and industrial machinery, are always included in wholesale trade.

424 Merchant Wholesalers, Nondurable Goods

Industries in the Merchant Wholesalers, Nondurable Goods subsector sell nondurable goods to other businesses. Nondurable goods are items generally with a normal life expectancy of less than three years. Nondurable goods merchant wholesale 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.

4241 Paper and Paper Product Merchant Wholesalers

42411 Printing and Writing Paper Merchant Wholesalers See industry description for 424110 below.

424110 Printing and Writing Paper Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of bulk printing and/or writing paper generally on rolls for further processing.

Illustrative Examples:

Bulk envelope paper merchant wholesalers

Bulk paper (e.g., fine, printing, writing) merchant wholesalers Bulk groundwood paper merchant wholesalers

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of stationery are classified in Industry 424120, Stationery and Office Supplies Merchant Wholesalers.

42412 Stationery and Office Supplies Merchant Wholesalers See industry description for 424120 below.

424120 Stationery and Office Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of stationery, office supplies, and/or gift wrap.

Illustrative Examples:

Computer paper supplies merchant wholesalers
Photocopy supplies merchant wholesalers
Envelope merchant wholesalers
Social stationery merchant wholesalers
File cards and folders merchant wholesalers
Typewriter paper merchant wholesalers
Greeting cards merchant wholesalers
Writing pens merchant wholesalers
Pencils merchant wholesalers

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of bulk printing and/or writing paper are classified in Industry 424110, Printing and Writing Paper Merchant Wholesalers.

42413 Industrial and Personal Service Paper Merchant Wholesalers See industry description for 424130 below.

424130 Industrial and Personal Service Paper Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of kraft wrapping and other coarse paper, paperboard, converted paper (except stationery and office supplies), and/or related disposable plastics products.

Illustrative Examples:

Disposable plastics eating utensils merchant wholesalers
Paper napkins merchant wholesalers
Paper and disposable plastics dishes merchant wholesalers
Paperboard and disposable plastics boxes merchant wholesalers
Paper and disposable plastics shipping supplies merchant wholesalers
Plastics bags merchant wholesalers
Paper bags merchant wholesalers
Sanitary paper products merchant wholesalers

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of stationery, office supplies, and/or gift wrap are classified in Industry 424120, Stationery and Office Supplies Merchant Wholesalers.

National Totals by Year						
NAICS 4241 - Paper and paper product merchant wholesalers						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	10,327	10,687	10,291	10,110	-1.76%	0.35%
Annual Payroll (\$1000)	7,939,294	8,194,336	8,064,727	8,426,471	4.49%	3.64%
Employees	147,313	148,932	147,849	147,105	-0.50%	0.44%
Average Payroll Per Employee(\$)	53,894.05	55,020.65	54,547.05	57,282.02	5.01%	
	3.20%					
Average Employment Per Establishment	14.26	13.94	14.37	14.55	1.28%	0.14%

2014 Top 10 Producer States			
NAICS 4241 - Paper and paper product merchant wholesalers			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	8,426,471	10,110	147,105
California	999,149	1,463	16,798
Illinois	844,663	628	10,870
New Jersey	590,504	471	8,266
Ohio	560,706	395	6,319
New York	524,210	812	8,946
Texas	437,262	663	8,173

Florida	359,174	599	7,019
Missouri	334,802	211	14,894
Massachusetts	329,008	229	4,971
Pennsylvania	327,436	390	5,611
Subtotal	5,306,914	5,861	91,867
% of U.S.	62.98%	57.97%	62.45%

2014 Top Western Producer States NAICS 4241 - Paper and paper product merchant wholesalers Annual Payroll Establishments Paid Employees (\$1,000)			
Total U.S.	\$8,426,471	10,110	147,105
Alaska	NR	16	NR
Arizona	95,023	135	1,838
California	999,149	1,463	16,798
Colorado	111,457	165	2,052
Hawaii	29,743	62	723
Idaho	21,409	27	415
Montana	9,244	27	221
Nevada	20,678	47	417
New Mexico	15,837	36	337
Oregon	72,431	128	1,162
Utah	69,692	73	1,346
Washington	165,073	190	2,571
Wyoming	2,670	14	78
Subtotal	1,612,406	2,383	27,958
% of U.S.	19.14%	23.57%	19.01%

NAICS 4241 - Paper and Paper Product Merchant Wholesalers Physical Infrastructure				N = 41 Very Important
	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	12%	15%	15%	59%
Access within 30 minutes to package freight services	15%	15%	24%	46%
Immediate access to a railhead or rail spur	93%	2%	2%	2%
Access within 30 minutes to rail freight	93%	7%	0%	0%
Access within 30 minutes to passenger air services	54%	20%	20%	7%
Access within 30 minutes to port or harbor facilities	83%	7%	7%	2%
Access within 30 minutes to an international trade port	80%	7%	10%	0%
Access to natural gas pipeline	61%	7%	17%	12%
Access within one day, at a reasonable cost, to the supplies you need	20%	20%	34%	24%
Access within one day, at a reasonable cost, to your customers	22%	10%	24%	44%
Access to 3-phase electric power	41%	7%	27%	24%
Access to fiber optic lines	32%	17%	15%	34%
Availability of high-volume water supply	76%	10%	12%	2%
Availability of high-volume wastewater disposal	90%	5%	5%	0%
Availability of solid waste disposal	76%	12%	12%	0%

Availability of cell phone service	0%	0%	0%	0%
Availability of local public transportation	59%	20%	10%	12%
Possibility for future expansion at site	41%	22%	27%	10%
Availability of high-speed internet	2%	10%	15%	73%
Access to ponds and streams	93%	2%	5%	0%
Availability of satellite transmission	56%	15%	22%	5%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	20%	32%	29%	20%
Availability of skilled workforce	32%	29%	22%	17%
Availability of technical workforce	46%	12%	17%	24%
Availability of unskilled workforce	37%	27%	27%	10%
Favorable local labor costs	15%	20%	32%	32%
Favorable worker's compensation tax rate	12%	12%	37%	34%
Favorable local business tax rates	7%	12%	37%	41%
Favorable state and local government incentives	0%	0%	0%	0%
Availability of union labor	0%	0%	0%	0%
Availability of specialized job training programs	54%	20%	20%	7%
Availability of long and short term financing	37%	17%	27%	20%
Existence of a business/trade association	0%	0%	0%	0%
Lenient environmental regulations	0%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	2%	5%	49%	44%
Availability of affordable housing	10%	20%	39%	32%
Clean air and water	15%	15%	39%	32%
High quality natural ecosystem	15%	15%	39%	32%
Outdoor recreation opportunities	34%	34%	20%	10%
Social and cultural opportunities	29%	37%	29%	2%
Retail shopping opportunities	32%	34%	27%	5%
Quality educational system (K-12)	15%	32%	34%	20%
Access within 30 minutes to college or university	27%	34%	29%	7%
Availability of quality healthcare	7%	17%	37%	39%
Availability of public safety services (e.g. police, fire station)	0%	12%	39%	49%
Climate	0%	0%	0%	0%
Ease of attracting skilled workers	22%	20%	27%	32%

4242 Drugs and Druggists' Sundries Merchant Wholesalers

42421 Drugs and Druggists' Sundries Merchant Wholesalers See industry description for 424210 below.

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.

Illustrative Examples:

Antibiotics merchant wholesalers
 Endocrine substances merchant wholesalers
 Blood derivatives merchant wholesalers
 In-vitro and in-vivo diagnostics merchant wholesalers
 Botanicals merchant wholesalers
 Vaccines merchant wholesalers
 Cosmetics merchant wholesalers
 Vitamins merchant wholesalers

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of surgical, dental, and hospital equipment are classified in Industry 423450, Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers.

National Totals by Year						
NAICS 4242 - Drugs and druggists' sundries merchant wholesalers						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	9,187	9,951	9,915	9,964	0.49%	8.23%
Annual Payroll (\$1000)	26,565,508	28,637,820	32,061,747	35,639,769	11.16%	20.88%
Employees	262,823	276,972	295,038	298,391	1.14%	10.39%
Average Payroll Per Employee(\$)	101,077.56	103,396.08	108,669.89	119,439.83	9.91%	
	9.32%					
Average Employment Per Establishment	28.61	27.83	29.76	29.95	0.64%	2.00%

2014 Top 10 Producer States			
NAICS 4242 - Drugs and druggists' sundries merchant wholesalers			
Annual Payroll			
	Establishments	Paid Employees	
(\$1,000)			
Total U.S.	35,639,769	9,964	298,391

California	7,054,917	1,880	43,847
New Jersey	6,951,218	620	41,882
Pennsylvania	3,006,729	318	20,334
New York	2,661,824	1,007	24,825
Illinois	2,287,635	322	17,929
Texas	1,608,242	595	16,646
Massachusetts	1,323,673	156	7,794
Georgia	1,174,328	266	10,446
Florida	865,901	872	12,098
Ohio	478,416	239	7,389
Subtotal	27,412,883	6,275	203,190
% of U.S.	76.92%	62.98%	68.10%

2014 Top Western Producer States NAICS 4242 - Drugs and druggists' sundries merchant wholesalers Annual Payroll			
Employees		Establishments	Paid
	(\$1,000)		
Total U.S.	\$35,639,769	9,964	
298,391			
Alaska	3,848	14	69
Arizona	225,683		192
4,119			
California	7,054,917	1,880	43,847
Colorado	324,603		165
3,326			
Hawaii	34,945	60	815
Idaho	NR		50 NR
Montana	13,160	39	223
Nevada	66,351		125
1,205			
New Mexico	31,069	44	494
Oregon	59,843		102
1,111			
Utah	380,892	146	4,819
Washington	217,730		199
2,869			
Wyoming	NR	11	NR
Subtotal	8,413,041	3,027	62,897

U.S.	% of 23.61%	30.38%	21.08%	
NAICS 4242 - Drugs and Druggists' Sundries Merchant Wholesalers				N = 39 Very Important
Physical Infrastructure				
	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	15%	15%	36%	33%

Access within 30 minutes to package freight services	28%	3%	26%	44%
Immediate access to a railhead or rail spur	90%	5%	3%	3%
Access within 30 minutes to rail freight	90%	3%	5%	3%
Access within 30 minutes to passenger air services	38%	23%	26%	13%
Access within 30 minutes to port or harbor facilities	67%	13%	15%	5%
Access within 30 minutes to an international trade port	64%	8%	23%	5%
Access to natural gas pipeline	72%	10%	13%	5%
Access within one day, at a reasonable cost, to the supplies you need	23%	8%	38%	31%
Access within one day, at a reasonable cost, to your customers	23%	3%	36%	38%
Access to 3-phase electric power	44%	3%	33%	21%
Access to fiber optic lines	41%	8%	26%	18%
Availability of high-volume water supply	77%	3%	15%	5%
Availability of high-volume wastewater disposal	85%	5%	8%	3%
Availability of solid waste disposal	77%	8%	15%	0%
Availability of cell phone service	0%	0%	0%	0%
Availability of local public transportation	54%	13%	21%	10%
Possibility for future expansion at site	31%	15%	44%	10%
Availability of high-speed internet	5%	13%	23%	59%
Access to ponds and streams	95%	3%	3%	0%
Availability of satellite transmission	49%	18%	28%	5%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	28%	13%	36%	23%
Availability of skilled workforce	36%	10%	36%	18%
Availability of technical workforce	38%	13%	31%	18%
Availability of unskilled workforce	56%	10%	26%	8%
Favorable local labor costs	26%	5%	51%	18%
Favorable worker's compensation tax rate	18%	8%	44%	31%
Favorable local business tax rates	15%	3%	56%	26%
Favorable state and local government incentives	0%	0%	0%	0%
Availability of union labor	0%	0%	0%	0%
Availability of specialized job training programs	51%	26%	21%	3%
Availability of long and short term financing	26%	21%	44%	10%
Existence of a business/trade association	0%	0%	0%	0%
Lenient environmental regulations	0%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	8%	0%	69%	23%
Availability of affordable housing	5%	13%	59%	23%
Clean air and water	10%	13%	56%	21%
High quality natural ecosystem	10%	13%	56%	21%
Outdoor recreation opportunities	31%	26%	41%	3%

Social and cultural opportunities	21%	31%	44%	5%
Retail shopping opportunities	26%	21%	44%	10%
Quality educational system (K-12)	21%	10%	28%	38%
Access within 30 minutes to college or university	31%	18%	44%	5%
Availability of quality healthcare	5%	8%	44%	44%
Availability of public safety services (e.g. police, fire station)	3%	10%	51%	36%
Climate	0%	0%	0%	0%
Ease of attracting skilled workers	18%	13%	46%	21%

4248 Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers

42481 Beer and Ale Merchant Wholesalers See industry description for 424810 below.

424810 Beer and Ale Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of beer, ale, porter, and other fermented malt beverages.

42482 Wine and Distilled Alcoholic Beverage Merchant Wholesalers See industry description for 424820 below.

424820 Wine and Distilled Alcoholic Beverage Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of wine, distilled alcoholic beverages, and/or neutral spirits and ethyl alcohol used in blended wines and distilled liquors.

National Totals by Year						
NAICS 4248 - Beer, wine, and distilled alcoholic beverage merchant wholesalers						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	4,219	4,423	4,482	4,487	0.11%	5.81%
Annual Payroll (\$1000)	10,009,446	10,712,144	11,045,522	12,206,401	10.51%	13.11%
Employees	178,211	183,670	188,149	193,686	2.94%	5.77%
Average Payroll Per Employee(\$)	56,166.26	58,322.77	58,706.25	63,021.60	7.35%	
	6.86%					
Average Employment Per Establishment	42.24	41.53	41.98	43.17	2.83%	-0.04%

2014 Top 10 Producer States			
NAICS 4248 - Beer, wine, and distilled alcoholic beverage merchant			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	12,206,401	4,487	193,686
California	1,762,689	650	21,723
New York	1,133,939	437	15,630
Texas	938,654	288	17,304
Florida	915,882	269	14,758
Illinois	684,426	193	7,867
New Jersey	426,154	138	5,338
Ohio	319,697	98	5,921
Georgia	319,149	100	5,378
Washington	306,506	127	5,647
Massachusetts	302,057	109	4,160
Subtotal	7,109,153	2,409	103,726
% of U.S.	58.24%	53.69%	53.55%

2014 Top Western Producer States			
NAICS 4248 - Beer, wine, and distilled alcoholic beverage merchant			
Annual Payroll			
		Establishments	Paid Employees
	(\$1,000)		
Total U.S.	\$12,206,401	4,487	193,686
Alaska	NR	8	NR
Arizona	282,215	67	4,946
California	1,762,689	650	21,723
Colorado	NR	101	NR
Hawaii	82,777	32	1,208
Idaho	44,591	29	1,278
Montana	38,195	31	968
Nevada	228,042	42	2,493
New Mexico	NR	27	NR
Oregon	135,815	83	2,663
Utah	30,746	22	739
Washington	306,506	127	5,647
Wyoming	16,546	21	308
Subtotal	2,928,122	1,240	41,973
% of U.S.	23.99%	27.64%	21.67%

NAICS 4248 - Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesale				N = 41
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	17%	12%	22%	49%
Access within 30 minutes to package freight services	24%	12%	29%	34%
Immediate access to a railhead or rail spur	71%	15%	7%	7%
Access within 30 minutes to rail freight	78%	7%	10%	5%
Access within 30 minutes to passenger air services	54%	10%	24%	12%
Access within 30 minutes to port or harbor facilities	76%	12%	2%	10%
Access within 30 minutes to an international trade port	73%	7%	10%	10%
Access to natural gas pipeline	46%	0%	27%	27%
Access within one day, at a reasonable cost, to the supplies you need	27%	22%	37%	15%
Access within one day, at a reasonable cost, to your customers	12%	2%	20%	66%
Access to 3-phase electric power	12%	5%	24%	56%
Access to fiber optic lines	24%	22%	37%	17%
Availability of high-volume water supply	76%	12%	12%	0%
Availability of high-volume wastewater disposal	80%	10%	7%	2%
Availability of solid waste disposal	68%	15%	17%	0%
Availability of cell phone service	0%	0%	0%	0%
Availability of local public transportation	61%	10%	22%	7%
Possibility for future expansion at site	15%	22%	37%	27%
Availability of high-speed internet	7%	0%	22%	71%
Access to ponds and streams	100%	0%	0%	0%
Availability of satellite transmission	34%	24%	32%	10%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	12%	15%	44%	29%

Availability of skilled workforce	15%	20%	29%	37%
Availability of technical workforce	44%	15%	20%	22%
Availability of unskilled workforce	24%	24%	39%	12%
Favorable local labor costs	5%	7%	56%	32%
Favorable worker's compensation tax rate	5%	5%	41%	49%
Favorable local business tax rates	5%	7%	34%	54%
Favorable state and local government incentives	0%	0%	0%	0%
Availability of union labor	0%	0%	0%	0%
Availability of specialized job training programs	46%	27%	17%	7%
Availability of long and short term financing	20%	20%	27%	29%
Existence of a business/trade association	0%	0%	0%	0%
Lenient environmental regulations	0%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	2%	49%	46%
Availability of affordable housing	7%	10%	49%	32%
Clean air and water	10%	15%	51%	22%
High quality natural ecosystem	10%	15%	51%	22%
Outdoor recreation opportunities	17%	20%	39%	22%
Social and cultural opportunities	15%	24%	44%	15%
Retail shopping opportunities	20%	20%	41%	17%
Quality educational system (K-12)	7%	15%	39%	37%
Access within 30 minutes to college or university	24%	22%	29%	22%
Availability of quality healthcare	5%	5%	39%	49%
Availability of public safety services (e.g. police, fire station)	2%	7%	39%	49%
Climate	0%	0%	0%	0%
Ease of attracting skilled workers	5%	22%	37%	34%

4249 Miscellaneous Nondurable Goods Merchant Wholesalers

This industry group comprises establishments primarily engaged in the merchant wholesale distribution of nondurable goods, such as farm supplies; books, periodicals and newspapers; flowers; nursery stock; paints; varnishes; tobacco and tobacco products; and other miscellaneous nondurable goods, such as cut Christmas trees and pet supplies.

42491 Farm Supplies Merchant Wholesalers See industry description for 424910 below.

424910 Farm Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of farm supplies, such as animal feeds, fertilizers, agricultural chemicals, pesticides, plant seeds, and plant bulbs.

Cross-References. Establishments primarily engaged in--

- Merchant wholesale distribution of pet food--are classified in Industry 424490, Other Grocery and Related Products Merchant Wholesalers;
- Merchant wholesale distribution of grains--are classified in Industry 424510, Grain and Field Bean Merchant Wholesalers;
- Merchant wholesale distribution of pet supplies--are classified in Industry 424990, Other Miscellaneous Nondurable Goods Merchant Wholesalers; and

- Merchant wholesale distribution of nursery stock (except seeds and plant bulbs)--are classified in Industry 424930, Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers.

42492 Book, Periodical, and Newspaper Merchant Wholesalers See industry description for 424920 below.

424920 Book, Periodical, and Newspaper Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of books, periodicals, and newspapers.

42493 Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers See industry description for 424930 below.

424930 Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of flowers, florists' supplies, and/or nursery stock (except plant seeds and plant bulbs).

Cross-References. Establishments primarily engaged in--

- Merchant wholesale distribution of cut Christmas trees--are classified in Industry 424990, Other Miscellaneous Nondurable Goods Merchant Wholesalers; and
- Merchant wholesale distribution of plant seeds and plant bulbs--are classified in Industry 424910, Farm Supplies Merchant Wholesalers.

42494 Tobacco and Tobacco Product Merchant Wholesalers See industry description for 424940 below.

424940 Tobacco and Tobacco Product Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of tobacco products, such as cigarettes, snuff, cigars, and pipe tobacco.

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of leaf tobacco are classified in Industry 424590, Other Farm Product Raw Material Merchant Wholesalers.

42495 Paint, Varnish, and Supplies Merchant Wholesalers See industry description for 424950 below.

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; and supplies, such as paint brushes and rollers.

Cross-References.

Establishments primarily engaged in the merchant wholesale distribution of artists' paints are classified in Industry 424990, Other Miscellaneous Nondurable Goods Merchant Wholesalers.

42499 Other Miscellaneous Nondurable Goods Merchant Wholesalers See industry description for 424990 below.

424990 Other Miscellaneous Nondurable Goods Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of nondurable goods (except printing and writing paper; stationery and office supplies; industrial and personal service paper; drugs and druggists' sundries; apparel, piece goods, and notions; grocery and related products; farm product raw materials; chemical and allied products; petroleum and petroleum products; beer, wine, and distilled alcoholic beverages; farm supplies; books, periodicals and newspapers; flower, nursery stock and florists' supplies; tobacco and tobacco products; and paint, varnishes, wallpaper, and supplies).

Illustrative Examples:

Artists' supplies merchant wholesalers
Pet supplies (except pet food) merchant wholesalers
Burlap merchant wholesalers
Statuary goods (except religious) merchant wholesalers
Christmas trees merchant wholesalers
Textile bags merchant wholesalers
Industrial yarn merchant wholesalers

Cross-References. Establishments primarily engaged in--

- Distribution of advertising specialties--are classified in Industry 541890, Other Services Related to Advertising;
- Merchant wholesale distribution of farm supplies--are classified in Industry 424910, Farm Supplies Merchant Wholesalers;
- Merchant wholesale distribution of books, periodicals, and newspapers--are classified in Industry 424920, Book, Periodical, and Newspaper Merchant Wholesalers;
- Merchant wholesale distribution of flowers, nursery stock, and florists' supplies--are classified in Industry 424930, Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers;
- Merchant wholesale distribution of tobacco and its products--are classified in Industry 424940, Tobacco and Tobacco Product Merchant Wholesalers;

- Merchant wholesale distribution of paints, varnishes, and similar coatings; pigments; wallpaper; and supplies--are classified in Industry 424950, Paint, Varnish, and Supplies Merchant Wholesalers;
- Merchant wholesale distribution of bulk printing and/or writing paper--are classified in Industry 424110, Printing and Writing Paper Merchant Wholesalers;
- Merchant wholesale distribution of stationery, office supplies, and/or gift wrap--are classified in Industry 424120, Stationery and Office Supplies Merchant Wholesalers;
- Merchant wholesale distribution of wrapping and other coarse paper, paperboard, converted paper (except stationery and office supplies), and related disposable plastics products--are classified in Industry 424130, Industrial and Personal Service Paper Merchant Wholesalers;
- Merchant wholesale distribution of biological and medical products; botanical drugs and herbs; and pharmaceutical products intended for internal and external consumption--are classified in Industry 424210, Drugs and Druggists' Sundries Merchant Wholesalers;
- Merchant wholesale distribution of clothing and accessories, footwear, piece goods, yard goods, notions, and/or hair accessories--are classified in Industry Group 4243, Apparel, Piece Goods, and Notions Merchant Wholesalers;
- Merchant wholesale distribution of meat, poultry, seafood, confectioneries, fruits and vegetables; and other groceries and related products--are classified in Industry Group 4244, Grocery and Related Product Merchant Wholesalers;
- Merchant wholesale distribution of grains, field beans, livestock, and other farm product raw materials--are classified in Industry Group 4245, Farm Product Raw Material Merchant Wholesalers;
- Merchant wholesale distribution of chemicals; plastics materials and basic forms and shapes; and allied products--are classified in Industry Group 4246, Chemical and Allied Products Merchant Wholesalers;
- Merchant wholesale distribution of petroleum and petroleum products--are classified in Industry Group 4247, Petroleum and Petroleum Products Merchant Wholesalers;
- Merchant wholesale distribution of beer, ale, wine, and distilled alcoholic beverages--are classified in Industry Group 4248, Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers;
- Merchant wholesale distribution of pet foods--are classified in Industry 424490, Other Grocery and Related Products Merchant Wholesalers;
- Merchant wholesale distribution of religious statuary--are classified in Industry 423990, Other Miscellaneous Durable Goods Merchant Wholesalers; and
- Merchant wholesale distribution of knitting yarns (except industrial)--are classified in Industry 424310, Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers.

National Totals by Year						
NAICS 4249 - Miscellaneous nondurable goods merchant wholesalers						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	27,594	29,206	28,878	28,871	-0.02%	5.04%
Annual Payroll (\$1000)	14,259,283	15,656,268	15,637,115	16,313,191	4.32%	11.29%
Employees	317,027	336,359	330,177	338,339	2.47%	5.66%

Average Payroll Per Employee(\$)	44,978.13	46,546.30	47,359.79	48,215.52	1.81%	
	5.33%					
Average Employment Per Establishment	11.49	11.52	11.43	11.72	2.50%	0.59%

2014 Top 10 Producer States			
NAICS 4249 - Miscellaneous nondurable goods merchant wholesalers			
Annual Payroll		Establishments	Paid Employees
(\$1,000)			
Total U.S.	16,313,191	28,871	338,339
California	2,318,043	4,671	44,320
Illinois	1,284,160	1,419	21,758
New York	1,036,309	2,324	17,536
Florida	940,041	2,280	25,718
Texas	899,965	1,975	20,400
North Carolina	606,103	755	11,346
New Jersey	571,093	851	10,407
Pennsylvania	562,329	898	13,144
Minnesota	550,322	672	9,327
Ohio	507,806	807	10,552
Subtotal	9,276,171	16,652	184,508
% of U.S.	56.86%	57.68%	54.53%

2014 Top Western Producer States			
NAICS 4249 - Miscellaneous nondurable goods merchant wholesalers			
Annual Payroll		Establishments	Paid
Employees	(\$1,000)		
Total U.S.	\$16,313,191	28,871	
338,339			
Alaska	NR	30	NR
Arizona	204,790	420	
4,285			
California	2,318,043	4,671	44,320
Colorado	224,756	424	
4,136			
Hawaii	48,050	180	1,404
Idaho	169,798	222	
3,463			
Montana	39,204	133	925

Nevada	52,977	179	
1,341			
New Mexico	56,024	95	1,136
Oregon	200,127		384
4,590			
Utah	85,397	195	2,073
Washington	438,274		675
8,398			
Wyoming	8,509	38	225
Subtotal	3,845,949	7,646	76,296
% of			
U.S.	23.58%	26.48%	22.55%

NAICS 4249 - Miscellaneous Nondurable Goods Merchant		Wholesalers		N = 8 Very Important
Physical Infrastructure		Not Important	Somewhat Important	
		Important	Important	
Access within 30 minutes to an interstate highway		25%	13%	25%
Access within 30 minutes to package freight services		38%	25%	38%
Immediate access to a railhead or rail spur		75%	0%	0%
Access within 30 minutes to rail freight		88%	0%	0%
Access within 30 minutes to passenger air services		75%	25%	0%
Access within 30 minutes to port or harbor facilities		88%	13%	0%
Access within 30 minutes to an international trade port		100%	0%	0%
Access to natural gas pipeline		63%	13%	0%
Access within one day, at a reasonable cost, to the supplies you need		50%	13%	0%
Access within one day, at a reasonable cost, to your customers		13%	0%	0%
Access to 3-phase electric power		25%	0%	25%
Access to fiber optic lines		25%	25%	25%
Availability of high-volume water supply		63%	13%	0%
Availability of high-volume wastewater disposal		88%	13%	0%
Availability of solid waste disposal		63%	38%	0%
Availability of cell phone service		0%	0%	13%
Availability of local public transportation		100%	0%	0%
Possibility for future expansion at site		38%	38%	25%
Availability of high-speed internet		0%	25%	13%
Access to ponds and streams		13%	0%	0%
Availability of satellite transmission		0%	13%	0%

Economic Infrastructure	Not Important	Somewhat Important	Very Important
	Important	Important	Important
Availability of managerial workforce	50%	25%	0%
Availability of skilled workforce	50%	13%	13%
Availability of technical workforce	63%	13%	13%
Availability of unskilled workforce	38%	13%	13%
Favorable local labor costs	13%	25%	13%
Favorable worker's compensation tax rate	38%	25%	25%
Favorable local business tax rates	13%	25%	13%
Favorable state and local government incentives	88%	0%	0%
Availability of union labor	25%	50%	0%

Availability of specialized job training programs	88%	0%	0%	13%
Availability of long and short term financing	38%	38%	0%	25%
Existence of a business/trade association	63%	13%	0%	13%
Lenient environmental regulations	38%	13%	13%	25%

Quality of Life	Not Important	Somewhat Important	Very Important	Very Important
Low crime rate	25%	0%	13%	63%
Availability of affordable housing	13%	25%	38%	25%
Clean air and water	13%	13%	13%	63%
High quality natural ecosystem	38%	38%	0%	25%
Outdoor recreation opportunities	50%	25%	13%	13%
Social and cultural opportunities	38%	25%	13%	25%
Retail shopping opportunities	38%	38%	13%	13%
Quality educational system (K-12)	25%	13%	25%	38%
Access within 30 minutes to college or university	50%	25%	13%	13%
Availability of quality healthcare	13%	0%	38%	50%
Availability of public safety services (e.g. police, fire station)	25%	0%	25%	50%
Climate	25%	13%	0%	50%
Ease of attracting skilled workers	0%	0%	13%	0%

Sector 51—Information^T

The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.

The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; Web search portals, data processing industries, and the information services industries.

The expressions "information age" and "global information economy" are used with considerable frequency today. The general idea of an "information economy" includes both the notion of industries primarily producing, processing, and distributing information, as well as the idea that every industry is using available information and information technology to reorganize and make themselves more productive.

For the purposes of NAICS, it is the transformation of information into a commodity that is produced and distributed by a number of growing industries that is at issue. The Information sector groups three types of establishments: (1) those engaged in producing and distributing information and cultural products; (2) those that provide the means to transmit or distribute these products as well as data or communications; and (3) those that process data. Cultural products are those that directly express attitudes, opinions, ideas, values, and artistic creativity; provide entertainment; or offer information and analysis concerning the past and present. Included in this definition are popular, mass-produced products as well as cultural products that normally have a more limited audience, such as poetry books, literary magazines, or classical records.

The unique characteristics of information and cultural products, and of the processes involved in their production and distribution, distinguish the Information sector from the goods-producing and service-producing sectors. Some of these characteristics are:

1. Unlike traditional goods, an "information or cultural product," such as a newspaper on-line or television program, does not necessarily have tangible qualities, nor is it necessarily associated with a particular form. A movie can be shown at a movie theater, on a television broadcast, through video-on-demand or rented at a local video store. A sound recording can be aired on radio, embedded in multimedia products, or sold at a record store.
2. Unlike traditional services, the delivery of these products does not require direct contact between the supplier and the consumer.
3. The value of these products to the consumer lies in their informational, educational, cultural, or entertainment content, not in the format in which they are distributed. Most of these products are protected from unlawful reproduction by copyright laws.
4. The intangible property aspect of information and cultural products makes the processes involved in their production and distribution very different from goods and services. Only those possessing the rights to these works are authorized to reproduce, alter, improve, and distribute them. Acquiring and using these rights often involves significant costs. In addition, technology is revolutionizing the distribution of these products. It is possible to distribute them in a physical form, via broadcast, or on-line.
5. Distributors of information and cultural products can easily add value to the products they distribute. For instance, broadcasters add advertising not contained in the original product. This capacity means that unlike traditional distributors, they derive revenue not from sale of the distributed product to the final consumer, but from those who pay for the privilege of adding information to the original product. Similarly, a directory and mailing list publisher can acquire the rights to thousands of previously published newspaper and periodical articles and add new value by providing search and software and organizing the information in a way that facilitates research and retrieval. These products often command a much higher price than the original information.

The distribution modes for information commodities may either eliminate the necessity for traditional manufacture, or reverse the conventional order of manufacture-distribute: A newspaper distributed on-line, for example, can be printed locally or by the final consumer. Similarly, it is anticipated that packaged software, which today is mainly bought through the traditional retail channels, will soon be available mainly on-line. The NAICS Information sector is designed to make such economic changes transparent as they occur, or to facilitate designing surveys that will monitor the new phenomena and provide data to analyze the changes.

Many of the industries in the NAICS Information sector are engaged in producing products protected by copyright law, or in distributing them (other than distribution by traditional wholesale and retail methods). Examples are traditional publishing industries, software and directory and mailing list publishing industries, and film and sound industries. Broadcasting and telecommunications industries and information providers and processors are also included in the Information sector, because their technologies are so closely linked to other industries in the Information sector.

Industries in the Broadcasting (except Internet) subsector include establishments that create content or acquire the right to distribute content and subsequently broadcast the content. The industry groups (Radio and Television Broadcasting and Cable and Other Subscription Programming) are based on differences in the methods of communication and the nature of services provided. The Radio and Television Broadcasting industry group includes establishments that operate broadcasting studios and facilities for over the air or satellite delivery of radio and television programs of entertainment, news, talk, and the like. These establishments are often engaged in the production and purchase of programs and generating revenues from the sale of air time to advertisers and from donations, subsidies, and/or the sale of programs. The Cable and Other Subscription Programming industry group includes establishments operating studios and facilities for the broadcasting of programs that are typically narrowcast in nature (limited format, such as news, sports, education, and youth-oriented programming) on a subscription or fee basis.

The distribution of cable and other subscription programming is included in Subsector 517, Telecommunications. Establishments that broadcast exclusively on the Internet are included in Subsector 519, Other Information Services.

5152 Cable and Other Subscription Programming^T

51821 Data Processing, Hosting, and Related Services^T See industry description for 518210 below.

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.

Illustrative Examples:

- Application hosting
- Optical scanning services
- Application service providers
- Web hosting
- Computer data storage services

National Totals by Year						
NAICS 5152 - Cable and other subscription programming						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	770	747	758	751	-0.92%	-2.34%
Annual Payroll (\$1000)	5,953,638	5,825,049	7,234,012	6,899,382	-4.63%	11.74%
Employees	49,983	47,699	60,860	53,406	-12.25%	8.01%
Average Payroll Per Employee(\$)	119,113.26	122,120.99	118,863.16	129,187.39	8.69%	
	3.59%					
Average Employment Per Establishment	64.91	63.85	80.29	71.11	-11.43%	10.54%

2014 Top 10 Producer States			
NAICS 5152 - Cable and other subscription programming			
Annual Payroll		Establishments	Paid Employees
(\$1,000)			
Total U.S.	6,899,382	751	53,406
New York	3,062,695	105	17,652
California	1,158,136	148	11,129
Maryland	304,528	20	2,287
New Jersey	172,857	20	1,347
District of Columbia	172,136	11	1,012
Florida	146,700	44	1,454
Illinois	87,381	29	1,669
Massachusetts	61,502	63	887
Pennsylvania	44,800	16	581
Michigan	38,381	22	294
Subtotal	5,249,116	478	38,312
% of U.S.	76.08%	63.65%	71.74%

2014 Top Western Producer States				
NAICS 5152 - Cable and other subscription programming				
Annual Payroll			Establishments	Paid
Employees	(\$1,000)			
Total U.S.	\$6,899,382		751	
53,406				
Alaska	NR	NR	NR	
Arizona	NR		5	NR
California	1,158,136	148	11,129	
Colorado	NR		11	NR
Hawaii	NR	2	NR	
Idaho	NR		1	NR
Montana	NR	1	NR	
Nevada	1,271		4	NR
New Mexico	NR	2	NR	
Oregon	2,348		6	
67				
Utah	114	3	NR	
Washington	9,970		9	
157				

Wyoming	NR	1	NR
Subtotal	1,171,839	193	11,353
% of			
U.S.	16.98%	25.70%	21.26%

NAICS 5152 - Cable and Other Subscription Programming				N = 3
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	33%	0%	33%	33%
Access within 30 minutes to package freight services		67%	0%	33%
Immediate access to a railhead or rail spur		100%	0%	0%
Access within 30 minutes to rail freight		100%	0%	0%
Access within 30 minutes to passenger air services		67%	0%	33%
Access within 30 minutes to port or harbor facilities		100%	0%	0%
Access within 30 minutes to an international trade port		67%	0%	33%
Access to natural gas pipeline		100%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need		33%	33%	0%
Access within one day, at a reasonable cost, to your customers		33%	33%	0%
Access to 3-phase electric power		67%	0%	33%
Access to fiber optic lines		67%	0%	33%
Availability of high-volume water supply		100%	0%	0%
Availability of high-volume wastewater disposal		100%	0%	0%
Availability of solid waste disposal		100%	0%	0%
Availability of cell phone service		0%	0%	67%
Availability of local public transportation		67%	0%	33%
Possibility for future expansion at site		67%	0%	33%
Availability of high-speed internet		0%	0%	100%
Access to ponds and streams		33%	0%	0%
Availability of satellite transmission		0%	0%	33%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	67%	0%	0%	33%
Availability of skilled workforce	67%	0%	0%	33%
Availability of technical workforce	67%	0%	0%	33%
Availability of unskilled workforce	67%	0%	33%	0%
Favorable local labor costs	67%	0%	0%	33%
Favorable worker's compensation tax rate	67%	0%	0%	33%
Favorable local business tax rates	67%	0%	0%	33%
Favorable state and local government incentives	67%	0%	0%	0%
Availability of union labor	67%	0%	0%	0%
Availability of specialized job training programs	67%	0%	33%	0%
Availability of long and short term financing	67%	0%	0%	33%
Existence of a business/trade association	67%	0%	0%	0%
Lenient environmental regulations	67%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	33%	0%	0%	67%
Availability of affordable housing	33%	33%	0%	33%
Clean air and water	33%	0%	0%	67%

High quality natural ecosystem	33%	0%	33%	33%
Outdoor recreation opportunities	33%	33%	33%	0%
Social and cultural opportunities	33%	33%	33%	0%
Retail shopping opportunities	33%	0%	33%	33%
Quality educational system (K-12)	33%	0%	33%	33%
Access within 30 minutes to college or university	67%	0%	33%	0%
Availability of quality healthcare	33%	0%	0%	67%
Availability of public safety services (e.g. police, fire station)	33%	0%	0%	67%
Climate	33%	0%	33%	0%
Ease of attracting skilled workers	0%	0%	0%	33%

517 Telecommunications^T

Industries in the Telecommunications subsector group establishments that provide telecommunications and the services related to that activity (e.g., telephony, including Voice over Internet Protocol (VoIP); cable and satellite television distribution services; Internet access; telecommunications reselling services). The Telecommunications subsector is primarily engaged in operating, and/or providing access to facilities for the transmission of voice, data, text, sound, and video. Transmission facilities may be based on a single technology or a combination of technologies. Establishments in the Telecommunications subsector are grouped into four industry groups. The first three are comprised of establishments that operate transmission facilities and infrastructure that they own and/or lease, and provide telecommunications services using those facilities. The distinction among the first three industry groups is the type of infrastructure operated (i.e., wired, wireless, or satellite). The fourth industry group is comprised of establishments that provide support activities, telecommunications reselling services, or many of the same services provided by establishments in the first three industry groups, but do not operate as telecommunications carriers. Establishments primarily engaged as independent contractors in the installation and maintenance of broadcasting and telecommunications systems are classified in Sector 23, Construction.

Establishments known as Internet cafes, primarily engaged in offering limited Internet connectivity in combination with other services such as facsimile services, training, rental of on-site personal computers, game rooms, or food services are classified in Subsector 561, Administrative and Support Services, or Subsector 722, Food Services and Drinking Places, depending on the primary activity.

5179 Other Telecommunications^T

51791 Other Telecommunications^T

This industry comprises establishments primarily engaged in (1) purchasing access and network capacity from owners and operators of telecommunications networks and reselling wired and wireless telecommunications services (except satellite) to businesses and households; (2) providing specialized telecommunications services, such as satellite tracking, communications telemetry, and radar station operation; (3) providing satellite terminal stations and associated facilities connected with one or more terrestrial systems and capable of transmitting telecommunications to, and receiving telecommunications from, satellite systems; or (4) providing Internet access services or Voice over Internet protocol (VoIP) services via client-supplied telecommunications connections. Establishments in this industry do not operate as telecommunications carriers. Mobile virtual network operators (MVNO) are included in this industry.

517911 Telecommunications Resellers

This U.S. industry comprises establishments engaged in purchasing access and network capacity from owners and operators of telecommunications networks and reselling wired and wireless telecommunications services (except satellite) to businesses and households. Establishments in this industry resell telecommunications; they do not operate transmission facilities and infrastructure. Mobile virtual network operators (MVNOs) are included in this industry.

Cross-References. Establishments primarily engaged in--

- Operating and maintaining wired telecommunications networks--are classified in Industry 517110, Wired Telecommunications Carriers;
- Operating and maintaining wireless telecommunications networks--are classified in Industry 517210, Wireless Telecommunications Carriers (except Satellite); and
- Reselling satellite telecommunications services--are classified in Industry 517410, Satellite Telecommunications.

517919 All Other Telecommunications

This U.S. industry comprises establishments primarily engaged in providing specialized telecommunications services, such as satellite tracking, communications telemetry, and radar station operation. This industry also includes establishments primarily engaged in providing satellite terminal stations and associated facilities connected with one or more terrestrial systems and capable of transmitting telecommunications to, and receiving telecommunications from, satellite systems. Establishments providing Internet services or voice over Internet protocol (VoIP) services via client-supplied telecommunications connections are also included in this industry.

Illustrative Examples:

Dial-up Internet service providers

VoIP service providers, using client-supplied telecommunications connections

Internet service providers using client-supplied telecommunications connections (e.g., dial-up ISPs) Satellite tracking stations

Cross-References. Establishments primarily engaged in--

- Providing wired broadband Internet services via own operated telecommunications infrastructure--are classified in Industry 517110, Wired Telecommunications Carriers;
- Providing wired VoIP services via own operated telecommunications infrastructure--are classified in Industry 517110, Wired Telecommunications Carriers;
- Providing expert advice in the field of information technology or in integrating communication and computer systems--are classified in Industry 54151, Computer Systems Design and Related Services; and
- Providing satellite telecommunications services--are classified in Industry 517410, Satellite Telecommunications.

National Totals by Year NAICS 5179 - Other telecommunications						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	5,083	4,315	4,778	5,118	7.12%	-6.81%
Annual Payroll (\$1000)	3,817,362	4,042,723	4,510,356	4,273,122	-5.26%	12.00%
Employees	53,904	51,335	55,612	56,869	2.26%	1.30%
Average Payroll Per Employee(\$)	70,817.79	78,751.79		75,139.74	-7.35%	10.61%
	81,104.01					
Average Employment Per Establishment	10.60	11.90	11.64	11.11	-4.53%	8.91%

2014 Top 10 Producer States NAICS 5179 - Other telecommunications			
	Annual Payroll	Establishments	
	(\$1,000)		Paid Employees
Total U.S.	4,273,122	5,118	56,869
California			7,766
	668,500	805	
New York	452,918	421	4,730
Florida			4,516
	380,058	503	
New Jersey	368,567	193	4,180
Massachusetts			3,463
	334,435	145	
Texas	322,786	344	4,422
Virginia			3,348
	316,104	156	
Georgia	188,977	158	2,265
North Carolina			1,919
	151,939	143	
Illinois	101,939	197	1,522
Subtotal	3,286,223	3,065	38,131
% of U.S.	76.90%	59.89%	67.05%

2014 Top Western Producer States NAICS 5179 - Other telecommunications: Annual Payroll			
	Establishments (\$1,000)		Paid Employees
Total U.S.	\$4,273,122	5,118	56,869
Alaska	NR	21	NR
Arizona	59,842	113	1,183
California	668,500	805	7,766
Colorado	58,957	116	936
Hawaii	4,125	16	NR
Idaho	2,348	17	NR
Montana	3,026	20	NR
Nevada	30,814	60	433
New Mexico	3,826	24	NR
Oregon	98,890	81	2,179
Utah	56,381	78	992
Washington	89,636	133	1,220
Wyoming	1,726	14	61
Subtotal	1,078,071	1,498	14,770
% of U.S.	25.23%	29.27%	25.97%

NAICS 5179 - Other Telecommunications				N = 2 Very Important
Physical Infrastructure	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	0%	50%	0%	50%
Access within 30 minutes to package freight services	50%	0%	50%	0%
Immediate access to a railhead or rail spur	100%	0%	0%	0%
Access within 30 minutes to rail freight	100%	0%	0%	0%
Access within 30 minutes to passenger air services	0%	0%	50%	50%
Access within 30 minutes to port or harbor facilities	100%	0%	0%	0%
Access within 30 minutes to an international trade port	100%	0%	0%	0%
Access to natural gas pipeline	50%	50%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need	50%	50%	0%	0%
Access within one day, at a reasonable cost, to your customers	0%	0%	0%	100%
Access to 3-phase electric power	0%	0%	100%	0%
Access to fiber optic lines	0%	0%	50%	50%
Availability of high-volume water supply	100%	0%	0%	0%
Availability of high-volume wastewater disposal	100%	0%	0%	0%
Availability of solid waste disposal	100%	0%	0%	0%
Availability of cell phone service	0%	0%	0%	0%
Availability of local public transportation	0%	50%	50%	0%
Possibility for future expansion at site	50%	0%	50%	0%
Availability of high-speed internet	0%	0%	50%	50%
Access to ponds and streams	50%	0%	0%	0%
Availability of satellite transmission	50%	0%	0%	50%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
-------------------------	------------------	-----------------------	-----------	-------------------

Availability of managerial workforce	0%	0%	50%	50%
Availability of skilled workforce	0%	0%	50%	50%
Availability of technical workforce	0%	0%	50%	50%
Availability of unskilled workforce	50%	50%	0%	0%
Favorable local labor costs	0%	0%	50%	50%
Favorable worker's compensation tax rate	0%	50%	50%	0%
Favorable local business tax rates	0%	50%	50%	0%
Favorable state and local government incentives	0%	0%	0%	0%
Availability of union labor	0%	0%	0%	0%
Availability of specialized job training programs	100%	0%	0%	0%
Availability of long and short term financing	100%	0%	0%	0%
Existence of a business/trade association	0%	0%	0%	0%
Lenient environmental regulations	0%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	50%	50%	0%
Availability of affordable housing	0%	50%	50%	0%
Clean air and water	50%	50%	0%	0%
High quality natural ecosystem	50%	50%	0%	0%
Outdoor recreation opportunities	50%	50%	0%	0%
Social and cultural opportunities	50%	0%	50%	0%
Retail shopping opportunities	50%	0%	50%	0%
Quality educational system (K-12)	0%	50%	50%	0%
Access within 30 minutes to college or university	0%	0%	100%	0%
Availability of quality healthcare	50%	50%	0%	0%
Availability of public safety services (e.g. police, fire station)	50%	50%	0%	0%
Climate	0%	0%	0%	0%
Ease of attracting skilled workers	0%	0%	100%	0%

Sector 52--Finance and Insurance^T

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions. Three principal types of activities are identified:

1. Raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities. Establishments engaged in this activity use raised funds to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale, and risk. This activity is known as financial intermediation.
2. Pooling of risk by underwriting insurance and annuities. Establishments engaged in this activity collect fees, insurance premiums, or annuity considerations; build up reserves; invest those reserves; and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.
3. Providing specialized services facilitating or supporting financial intermediation, insurance, and employee benefit programs.

In addition, monetary authorities charged with monetary control are included in this sector.

The subsectors, industry groups, and industries within the NAICS Finance and Insurance sector are defined on the basis of their unique production processes. As with all industries, the production processes are distinguished by their use of specialized human resources and specialized physical capital. In addition, the way in which these establishments acquire and allocate financial capital, their source of funds, and the use of those funds provides a third basis for distinguishing characteristics of the production process. For instance, the production process in raising funds through deposit-taking is different from the process of raising funds in bond or money markets. The process of making loans to individuals also requires different production processes than does the creation of investment pools or the underwriting of securities.

Most of the Finance and Insurance subsectors contain one or more industry groups of (1) intermediaries with similar patterns of raising and using funds and (2) establishments engaged in activities that facilitate, or are otherwise related to, that type of financial or insurance intermediation. Industries within this sector are defined in terms of activities for which a production process can be specified, and many of these activities are not exclusive to a particular type of financial institution. To deal with the varied activities taking place within existing financial institutions, the approach is to split these institutions into components performing specialized services. This requires defining the units engaged in providing those services and developing procedures that allow for their delineation.

These units are the equivalents for finance and insurance of the establishments defined for other industries.

The output of many financial services, as well as the inputs and the processes by which they are combined, cannot be observed at a single location and can only be defined at a higher level of the organizational structure of the enterprise. Additionally, a number of independent activities that represent separate and distinct production processes may take place at a single location belonging to a multi-location financial firm. Activities are more likely to be homogeneous with respect to production characteristics than are locations, at least in financial services. The classification defines activities broadly enough that it can be used both by those classifying by location and by those employing a more topdown approach to the delineation of the establishment.

Establishments engaged in activities that facilitate, or are otherwise related to, the various types of intermediation have been included in individual subsectors, rather than in a separate subsector dedicated to services alone because these services are performed by intermediaries, as well as by specialist establishments, the extent to which the activity of the intermediaries can be separately identified is not clear.

The Finance and Insurance sector has been defined to encompass establishments primarily engaged in financial transactions; that is, transactions involving the creation, liquidation, change in ownership of financial assets; or in facilitating financial transactions. Financial industries are extensive users of electronic means for facilitating the verification of financial balances, authorizing transactions, transferring funds to and from transactors' accounts, notifying banks (or credit card issuers) of the individual transactions, and providing daily summaries. Since these transaction processing activities are integral to the production of finance and insurance services, establishments that principally provide a financial transaction processing service are classified to this sector, rather than to the data processing industry in the Information sector.

Legal entities that hold portfolios of assets on behalf of others are significant and data on them are required for a variety of purposes. Thus for NAICS, these funds, trusts, and other financial vehicles are the fifth subsector of the Finance and Insurance sector. These entities earn interest, dividends, and other property income, but have little or no employment and no revenue from the sale of services. Separate establishments and employees devoted to the management of funds are classified in Industry Group 5239, Other Financial Investment Activities.

523 Securities, Commodity Contracts, and Other Financial Investments and Related Activities^T

Industries in the Securities, Commodity Contracts, and Other Financial Investments and Related Activities subsector group establishments that are primarily engaged in one of the following: (1) underwriting securities issues and/or making markets for securities and commodities; (2) acting as agents (i.e., brokers) between buyers and sellers of securities and commodities; (3) providing securities and commodity exchange services; and (4) providing other services, such as managing portfolios of assets; providing investment advice; and trust, fiduciary, and custody services.

5239 Other Financial Investment Activities^T

This industry group comprises establishments primarily engaged in one of the following: (1) acting as principals in buying or selling financial contracts (except investment bankers, securities dealers, and commodity contracts dealers); (2) acting as agents (i.e., brokers) (except securities brokerages and commodity contracts brokerages) in buying or selling financial contracts; or (3) providing other investment services (except securities and commodity exchanges), such as portfolio management; investment advice; and trust, fiduciary, and custody services.

52391 Miscellaneous Intermediation

See industry description for 523910 below.

523910 Miscellaneous Intermediation

This industry comprises establishments primarily engaged in acting as principals (except investment bankers, securities dealers, and commodity contracts dealers) in buying or selling of financial contracts generally on a spread basis. Principals are investors that buy or sell for their own account.

Illustrative Examples:

Investment clubs

Tax liens dealing (i.e., acting as a principal in dealing tax liens to investors)

Mineral royalties or leases dealing (i.e., acting as a principal in dealing royalties or leases to investors) Venture capital companies

Cross-References.

Establishments primarily engaged in investment banking, securities dealing, securities brokering, commodity contracts dealing, or commodity contracts brokering are classified in Industry Group 5231, Securities and Commodity Contracts Intermediation and Brokerage.

52392 Portfolio Management

See industry description for 523920 below.

523920 Portfolio Management

This industry comprises establishments primarily engaged in managing the portfolio assets (i.e., funds) of others on a fee or commission basis. Establishments in this industry have the authority to make investment decisions, and they derive fees based on the size and/or overall performance of the portfolio.

Illustrative Examples:

Managing trusts
Pension fund managing
Mutual fund managing
Portfolio fund managing

Cross-References.

Establishments primarily engaged in investment banking, securities dealing, securities brokering, commodity contracts dealing, or commodity contracts brokering are classified in Industry Group 5231, Securities and Commodity Contracts Intermediation and Brokerage.

52393 Investment Advice

See industry description for 523930 below.

523930 Investment Advice

This industry comprises establishments primarily engaged in providing customized investment advice to clients on a fee basis, but do not have the authority to execute trades. Primary activities performed by establishments in this industry are providing financial planning advice and investment counseling to meet the goals and needs of specific clients.

Illustrative Examples:

Financial investment advice services, customized, fees paid by client
Investment advisory services, customized, fees paid by client
Financial planning services, customized, fees paid by client

Cross-References.

- Establishments providing investment advice in conjunction with their primary activity, such as portfolio management, or the sale of stocks, bonds, annuities, and real estate, are classified according to their primary activity; and
- Establishments known as publishers providing generalized investment information to subscribers are classified in Subsector 511, Publishing Industries (except Internet) or Industry 519130, Internet Publishing and Broadcasting and Web Search Portals.

52399 All Other Financial Investment Activities

This industry comprises establishments primarily engaged in acting as agents or brokers (except securities brokerages and commodity contracts brokerages) in buying and selling financial contracts providing financial investment activities (except securities and commodity exchanges, portfolio management, and investment advice).

Illustrative Examples:

Bank trust offices
Fiduciary agencies (except real estate)
Escrow agencies (except real estate)
Stock quotation services

Cross-References. Establishments primarily engaged in--

- Investment banking, securities dealing, securities brokerage, commodity contracts dealing, or commodity contracts brokering--are classified in Industry Group 5231, Securities and Commodity Contracts Intermediation and Brokerage;
- Acting as principals (except investment bankers, securities dealers, and commodity contracts dealers) in buying or selling financial contracts (except securities or commodity contracts)--are classified in Industry 52391, Miscellaneous Intermediation;
- Furnishing physical or electronic marketplaces for the purpose of facilitating the buying and selling of securities and commodities--are classified in Industry 52321, Securities and Commodity Exchanges;
- Managing the portfolio assets (i.e., funds) of others--are classified in Industry 52392, Portfolio Management;
- Providing customized investment advice--are classified in Industry 52393, Investment Advice;
- Awarding grants from trust funds--are classified in Industry 81321, Grantmaking and Giving Services;
- Performing real estate escrow or real estate fiduciary activities--are classified in Industry 53139, Other Activities Related to Real Estate; and
- Financial transactions processing, reserve, and clearinghouse activities--are classified in Industry 52232, Financial Transactions Processing, Reserve, and Clearinghouse Activities.

523991 Trust, Fiduciary, and Custody Activities

This U.S. industry comprises establishments primarily engaged in providing trust, fiduciary, and custody services to others, as instructed, on a fee or contract basis, such as bank trust offices and escrow agencies (except real estate).

Cross-References. Establishments primarily engaged in--

- Managing the portfolio assets (i.e., funds) of others--are classified in Industry 523920, Portfolio Management;
- Performing real estate escrow or real estate fiduciary activities--are classified in Industry 531390, Other Activities Related to Real Estate; and
- Awarding grants from trust funds--are classified in Industry 81321, Grantmaking and Giving Services.

523999 Miscellaneous Financial Investment Activities

This U.S. industry comprises establishments primarily engaged in acting as agents and/or brokers (except securities brokerages and commodity contracts brokerages) in buying or selling financial contracts and those providing financial investment services (except securities and commodity exchanges; portfolio management; investment advice; and trust, fiduciary, and custody services) on a fee or commission basis.

Illustrative Examples:

Exchange clearinghouses, commodities or securities
Stock quotation services
Gas lease brokers' offices

Cross-References. Establishments primarily engaged in--

- Investment banking, securities dealing, securities brokering, commodity contracts dealing, or commodity contracts brokering--are classified in Industry Group 5231, Securities and Commodity Contracts Intermediation and Brokerage;

- Acting as principals (except investment bankers, securities dealers, and commodity contracts dealers) in buying or selling financial contracts--are classified in Industry 523910, Miscellaneous Intermediation;
- Furnishing physical or electronic marketplaces for the purpose of facilitating the buying and selling of securities and commodities--are classified in Industry 523210, Securities and Commodity Exchanges;
- Managing the portfolio assets (i.e., funds) of others--are classified in Industry 523920, Portfolio Management;
- Providing customized investment advice--are classified in Industry 523930, Investment Advice;
- Providing trust, fiduciary, and custody services to others--are classified in U.S. Industry 523991, Trust, Fiduciary, and Custody Activities; and
- Financial transactions processing, reserve, and clearinghouse activities--are classified in Industry 522320, Financial Transactions Processing, Reserve, and Clearinghouse Activities.

National Totals by Year						
NAICS 5239 - Other financial investment activities						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	51,554	50,665	52,189	54,836	5.07%	1.96%
Annual Payroll (\$1000)	79,148,573	84,821,085	86,468,485	96,633,278	11.76%	12.84%
Employees	450,440	458,320	464,971	483,720	4.03%	4.12%
Average Payroll Per Employee(\$)	175,713.91	185,069.57		199,771.10	7.42%	8.28%
	185,965.33					
Average Employment Per Establishment	8.74	9.05	8.91	8.82	-0.99%	2.16%

2014 Top 10 Producer States			
NAICS 5239 - Other financial investment activities			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	96,633,278	54,836	483,720
New York	30,803,510	5,066	83,799
California	12,752,224	7,888	57,039
Massachusetts	8,076,652	1,761	35,857
Illinois	5,977,299	2,482	24,942
Texas	4,985,649	4,756	36,232
Pennsylvania	4,920,508	1,908	41,589
Connecticut	4,407,413	1,260	14,171
New Jersey	3,052,640	1,604	18,889
Florida	2,375,631	3,828	20,238
Maryland	2,198,679	921	13,456
Subtotal	79,550,205	31,474	346,212
% of U.S.	82.32%	57.40%	71.57%

2014 Top Western Producer States			
NAICS 5239 - Other financial investment activities			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	\$96,633,278	54,836	483,720
Alaska	32,938	74	284
Arizona	542,286	1,087	6,253
California	12,752,224	7,888	57,039
Colorado	1,185,879	1,511	10,122
Hawaii	34,820	120	371
Idaho	76,889	230	936
Montana	32,297	161	490
Nevada	160,098	692	2,493
New Mexico	195,589	217	1,312

Oregon	321,694	718	3,658
Utah	372,918	636	3,044
Washington	1,261,843	1,180	8,043
Wyoming	18,198	141	245
Subtotal	16,987,673	14,655	94,290
% of U.S.	17.58%	26.73%	19.49%

NAICS 5239 - Other Financial Investment Activities				N = 2
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	0%	100%	0%	0%
Access within 30 minutes to package freight services	100%	0%	0%	0%
Immediate access to a railhead or rail spur	100%	0%	0%	0%
Access within 30 minutes to rail freight	100%	0%	0%	0%
Access within 30 minutes to passenger air services	50%	0%	50%	0%
Access within 30 minutes to port or harbor facilities	100%	0%	0%	0%
Access within 30 minutes to an international trade port	100%	0%	0%	0%
Access to natural gas pipeline	100%	0%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need	50%	0%	0%	50%
Access within one day, at a reasonable cost, to your customers	50%	0%	0%	50%
Access to 3-phase electric power	50%	0%	0%	50%
Access to fiber optic lines	50%	0%	0%	50%
Availability of high-volume water supply	100%	0%	0%	0%
Availability of high-volume wastewater disposal	100%	0%	0%	0%
Availability of solid waste disposal	100%	0%	0%	0%
Availability of cell phone service	0%	50%	0%	0%
Availability of local public transportation	0%	0%	0%	100%
Possibility for future expansion at site	50%	0%	0%	50%
Availability of high-speed internet	0%	0%	0%	100%
Access to ponds and streams	0%	50%	0%	0%
Availability of satellite transmission	0%	0%	0%	50%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	0%	50%	0%	50%
Availability of skilled workforce	0%	50%	0%	50%
Availability of technical workforce	0%	50%	0%	50%
Availability of unskilled workforce	0%	50%	0%	50%
Favorable local labor costs	0%	0%	0%	100%
Favorable worker's compensation tax rate	0%	0%	0%	100%
Favorable local business tax rates	0%	0%	0%	100%
Favorable state and local government incentives	50%	0%	0%	0%
Availability of union labor	0%	0%	0%	50%
Availability of specialized job training programs	50%	0%	0%	50%
Availability of long and short term financing	50%	0%	0%	50%
Existence of a business/trade association	0%	50%	0%	0%
Lenient environmental regulations	50%	0%	0%	0%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	50%	0%	50%
Availability of affordable housing	0%	0%	0%	100%
Clean air and water	0%	0%	50%	50%
High quality natural ecosystem	50%	0%	50%	0%
Outdoor recreation opportunities	50%	0%	50%	0%
Social and cultural opportunities	0%	0%	50%	50%
Retail shopping opportunities	0%	0%	50%	50%
Quality educational system (K-12)	0%	0%	0%	100%
Access within 30 minutes to college or university	0%	50%	0%	50%
Availability of quality healthcare	0%	0%	0%	100%
Availability of public safety services (e.g. police, fire station)	0%	0%	50%	50%
Climate	50%	0%	0%	0%
Ease of attracting skilled workers	0%	0%	0%	50%

Sector 54-- Professional, Scientific, and Technical Services^T

The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

This sector excludes establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics. These establishments are classified in Sector 56, Administrative and Support and Waste Management and Remediation Services.

541 Professional, Scientific, and Technical Services^T

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.

5417 Scientific Research and Development Services^T

This industry group comprises establishments engaged in conducting original investigation undertaken on a systematic basis to gain new knowledge (research) and/or the application of research findings or other scientific knowledge for the creation of new or significantly improved products or processes (experimental development). The industries within this industry group are defined on the basis of the domain of research; that is, on the scientific expertise of the establishment.

54171 Research and Development in the Physical, Engineering, and Life Sciences^T

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.

Cross-References. Establishments primarily engaged in--

- Providing veterinary testing services--are classified in Industry 54194, Veterinary Services;
- Providing medical laboratory testing for humans--are classified in Industry 62151, Medical and Diagnostic Laboratories;
- Providing physical, chemical, or other analytical testing services (except medical or veterinary), such as acoustics or vibration testing, calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing--are classified in Industry 54138, Testing Laboratories; and
- Manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except diagnostic use) and/or uncompounded medicinal chemicals and their derivatives (i.e., enzyme proteins and antibiotics for pharmaceutical use)--are classified in Industry 32541, Pharmaceutical and Medicine Manufacturing.

541711 Research and Development in Biotechnology

This U.S. industry comprises establishments primarily engaged in conducting biotechnology research and experimental development. Biotechnology research and experimental development involves the study of the use of microorganisms and cellular and biomolecular processes to develop or alter living or non-living materials. This research and development in biotechnology may result in development of new biotechnology processes or in prototypes of new or genetically altered products that may be reproduced, utilized, or implemented by various industries.

Illustrative Examples:

Recombinant DNA research and experimental development laboratories
DNA technologies (e.g., microarrays) research and experimental development laboratories
Cloning research and experimental development laboratories
Protein engineering research and experimental development laboratories
Nucleic acid chemistry research and experimental development laboratories Nanobiotechnologies
research and experimental development laboratories

Cross-References. Establishments primarily engaged in--

- Conducting research and experimental development in the physical, engineering, and life sciences (except biotechnology)--are classified in U.S. Industry 541712, Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology);
- Providing veterinary testing services--are classified in Industry 541940, Veterinary Services;

- Providing physical, chemical, or other analytical testing services (except medical or veterinary), such as acoustics or vibration testing, calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing--are classified in Industry 541380, Testing Laboratories;
- Manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except diagnostic use)--are classified in U.S. Industry 325414, Biological Product (except Diagnostic) Manufacturing; and
- Manufacturing uncompounded medicinal chemicals and their derivatives (i.e., enzyme proteins and antibiotics for pharmaceutical use)--are classified in U.S. Industry 325411, Medicinal and Botanical Manufacturing.

541712 Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)

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

Cross-References. Establishments primarily engaged in--

- Providing physical, chemical, or other analytical testing services (except medical or veterinary)--are classified in Industry 541380, Testing Laboratories;
- Providing medical laboratory testing for humans--are classified in U.S. Industry 621511, Medical Laboratories;
- Conducting research and experimental development in biotechnology--are classified in U.S. Industry 541711, Research and Development in Biotechnology; and
- Providing veterinary testing services--are classified in Industry 541940, Veterinary Services.

54172 Research and Development in the Social Sciences and Humanities^T See industry description for 541720 below.

541720 Research and Development in the Social Sciences and Humanities

This industry comprises establishments primarily engaged in conducting research and analyses in cognitive development, sociology, psychology, language, behavior, economic, and other social science and humanities research.

Cross-References.

Establishments primarily engaged in marketing research are classified in Industry 541910, Marketing Research and Public Opinion Polling.

National Totals by Year						
NAICS 5417 - Scientific research and development services						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	17,081	17,406	17,615	18,174	3.17%	3.81%
Annual Payroll (\$1000)	70,138,494	66,020,323	66,871,182	75,300,652	12.61%	-1.06%
Employees	693,249	627,097	607,576	670,562	10.37%	-8.39%
Average Payroll Per Employee(\$)	101,173.60	105,279.28	110,062.25	112,294.84	2.03%	
	7.95%					
Average Employment Per Establishment	40.59	36.03	34.49	36.90	6.97%	-11.78%

2014 Top 10 Producer States			
NAICS 5417 - Scientific research and development services			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	75,300,652	18,174	670,562
California	18,305,305	3,648	129,877
Massachusetts	6,284,022	1,114	43,972
New Jersey	4,140,834	572	29,252
Maryland	3,697,790	778	35,799

New York	3,404,519	920	40,856
Minnesota	3,154,551	270	32,543
North Carolina	2,990,084	654	27,448
Pennsylvania	2,959,210	688	28,653
Virginia	2,828,321	672	27,146
Texas	2,727,493	997	25,314
Subtotal	50,492,129	10,313	420,860
% of U.S.	67.05%	56.75%	62.76%

2014 Top Western Producer States NAICS 5417 - Scientific research and development services Annual Payroll Establishments Paid Employees (\$1,000)			
Total U.S.	\$75,300,652	18,174	670,562
Alaska	28,190	41	526
Arizona	NR	307	NR
California	18,305,305	3,648	129,877
Colorado	2,023,010	469	14,255
Hawaii	113,428	100	1,553
Idaho	NR	74	NR
Montana	55,009	82	797
Nevada	289,026	113	3,513
New Mexico	NR	191	NR
Oregon	1,149,453	251	9,684
Utah	255,145	216	3,000
Washington	1,738,907	467	17,250
Wyoming	14,842	33	209
Subtotal	23,972,315	5,992	180,664
% of U.S.	31.84%	32.97%	26.94%

NAICS 5417 - Scientific Research and Development Services Physical Infrastructure				N = 41 Very Important
	Not Important	Somewhat Important	Important	
Access within 30 minutes to an interstate highway	22%	15%	29%	32%
Access within 30 minutes to package freight services	20%	15%	17%	46%
Immediate access to a railhead or rail spur	83%	5%	5%	2%
Access within 30 minutes to rail freight	88%	7%	2%	0%
Access within 30 minutes to passenger air services	10%	12%	22%	54%
Access within 30 minutes to port or harbor facilities	85%	10%	2%	0%
Access within 30 minutes to an international trade port	78%	15%	5%	0%
Access to natural gas pipeline	59%	10%	15%	12%
Access within one day, at a reasonable cost, to the supplies you need	29%	22%	24%	22%
Access within one day, at a reasonable cost, to your customers	39%	20%	17%	22%
Access to 3-phase electric power	27%	2%	24%	41%

Access to fiber optic lines	29%	10%	20%	34%
Availability of high-volume water supply	66%	7%	12%	12%
Availability of high-volume wastewater disposal	68%	17%	7%	5%
Availability of solid waste disposal	56%	22%	10%	10%
Availability of cell phone service	0%	0%	7%	2%
Availability of local public transportation	46%	17%	17%	17%
Possibility for future expansion at site	22%	29%	24%	22%
Availability of high-speed internet	5%	2%	20%	61%
Access to ponds and streams	73%	7%	2%	5%
Availability of satellite transmission	61%	10%	10%	7%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	24%	17%	20%	37%
Availability of skilled workforce	17%	5%	22%	51%
Availability of technical workforce	12%	10%	24%	51%
Availability of unskilled workforce	56%	29%	7%	5%
Favorable local labor costs	24%	24%	27%	22%
Favorable worker's compensation tax rate	22%	29%	24%	22%
Favorable local business tax rates	17%	22%	29%	29%
Favorable state and local government incentives	10%	0%	0%	0%
Availability of union labor	5%	2%	0%	2%
Availability of specialized job training programs	44%	22%	24%	7%
Availability of long and short term financing	34%	12%	34%	17%
Existence of a business/trade association	7%	2%	0%	0%
Lenient environmental regulations	2%	2%	0%	2%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	5%	20%	41%	32%
Availability of affordable housing	2%	17%	46%	32%
Clean air and water	5%	24%	41%	27%
High quality natural ecosystem	5%	24%	44%	24%
Outdoor recreation opportunities	12%	37%	27%	20%
Social and cultural opportunities	7%	29%	41%	20%
Retail shopping opportunities	24%	34%	32%	7%
Quality educational system (K-12)	5%	7%	32%	54%
Access within 30 minutes to college or university	12%	12%	27%	46%
Availability of quality healthcare	5%	5%	32%	56%
Availability of public safety services (e.g. police, fire station)	2%	12%	49%	34%
Climate	0%	0%	5%	2%
Ease of attracting skilled workers	10%	10%	24%	44%

Sector 71—Arts, Entertainment, and Recreation^T

The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

Some establishments that provide cultural, entertainment, or recreational facilities and services are classified in other sectors. Excluded from this sector are: (1) establishments that provide both accommodations and recreational facilities, such as hunting and fishing camps and resort and casino hotels are classified in Subsector 721, Accommodation; (2) restaurants and night clubs that provide live entertainment in addition to the sale of food and beverages are classified in Subsector 722, Food Services and Drinking Places; (3) motion picture theaters, libraries and archives, and publishers of newspapers, magazines, books, periodicals, and computer software are classified in Sector 51, Information; and (4) establishments using transportation equipment to provide recreational and entertainment services, such as those operating sightseeing buses, dinner cruises, or helicopter rides, are classified in Subsector 487, Scenic and Sightseeing Transportation.

713 Amusement, Gambling, and Recreation Industries^T

Industries in the Amusement, Gambling, and Recreation Industries subsector (1) operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities and/or (2) provide other amusement and recreation services, such as supplying and servicing amusement devices in places of business operated by others; operating sports teams, clubs, or leagues engaged in playing games for recreational purposes; and guiding tours without using transportation equipment.

This subsector does not cover all establishments providing recreational services. Other sectors of NAICS also provide recreational services. Providers of recreational services are often engaged in processes classified in other sectors of NAICS. For example, operators of resorts and hunting and fishing camps provide both accommodation and recreational facilities and services. These establishments are classified in Subsector 721, Accommodation, partly to reflect the significant costs associated with the provision of accommodation services and partly to ensure consistency with international standards. Likewise, establishments using transportation equipment to provide recreational and entertainment services, such as those operating sightseeing buses, dinner cruises, or helicopter rides, are classified in Sector 48-49, Transportation and Warehousing.

The industry groups in this subsector highlight particular types of activities: amusement parks and arcades, gambling industries, and other amusement and recreation industries. The groups, however, are not all inclusive of the activity. The Gambling Industries industry group does not provide for full coverage of gambling activities. For example, casino hotels are classified in Subsector 721, Accommodation; and horse and dog racing tracks are classified in Industry Group 7112, Spectator Sports.

7139 Other Amusement and Recreation Industries^T

71391 Golf Courses and Country Clubs^T

See industry description for 713910 below.

713910 Golf Courses and Country Clubs

This industry comprises (1) establishments primarily engaged in operating golf courses (except miniature) and (2) establishments primarily engaged in operating golf courses, along with dining facilities and other recreational facilities that are known as country clubs. These establishments often provide food and beverage services, equipment rental services, and golf instruction services.

Cross-References. Establishments primarily engaged in--

- Operating driving ranges and miniature golf courses--are classified in Industry 713990, All Other Amusement and Recreation Industries; and

- Operating resorts where golf facilities are combined with accommodations--are classified in Industry Group 7211, Traveler Accommodation.

71392 Skiing Facilities^T

See industry description for 713920 below.

713920 Skiing Facilities

This industry comprises establishments engaged in (1) operating downhill, cross-country, or related skiing areas and/or (2) operating equipment, such as ski lifts and tows. These establishments often provide food and beverage services, equipment rental services, and ski instruction services. Four-season resorts without accommodations are included in this industry.

Cross-References.

Establishments primarily engaged in operating resorts where skiing facilities are combined with accommodations are classified in Industry Group 7211, Traveler Accommodation.

71393 Marinas^T

See industry description for 713930 below.

713930 Marinas

This industry comprises establishments, commonly known as marinas, engaged in operating docking and/or storage facilities for pleasure craft owners, with or without one or more related activities, such as retailing fuel and marine supplies; and repairing, maintaining, or renting pleasure boats.

Cross-References. Establishments primarily engaged in--

- Renting pleasure boats--are classified in U.S. Industry 532292, Recreational Goods Rental;
- Repairing pleasure boats--are classified in Industry 811490, Other Personal and Household Goods Repair and Maintenance;
- Retailing marine supplies--are classified in U.S. Industry 441222, Boat Dealers; and □ Retailing fuel for boats--are classified in Industry 447190, Other Gasoline Stations.

71394 Fitness and Recreational Sports Centers^T See

industry description for 713940 below.

713940 Fitness and Recreational Sports Centers

This industry comprises establishments primarily engaged in operating fitness and recreational sports facilities featuring exercise and other active physical fitness conditioning or recreational sports activities, such as swimming, skating, or racquet sports.

Illustrative Examples:

Aerobic dance or exercise centers Ice or roller skating rinks

Gymnasiums
Physical fitness centers
Handball, racquetball, or tennis club facilities
Swimming or wave pools

Cross-References.

- Establishments primarily engaged in providing nonmedical services to assist clients in attaining or maintaining a desired weight are classified in U.S. Industry 812191, Diet and Weight Reducing Centers;
- Establishments primarily engaged in operating health resorts and spas where recreational facilities are combined with accommodations are classified in Industry 721110, Hotels (except Casino Hotels) and Motels; and
- Recreational sports clubs (i.e., sports teams) not operating sports facilities are classified in Industry 713990, All Other Amusement and Recreation Industries.

71395 Bowling Centers^T

See industry description for 713950 below.

713950 Bowling Centers

This industry comprises establishments engaged in operating bowling centers. These establishments often provide food and beverage services.

71399 All Other Amusement and Recreation Industries^T See
industry description for 713990 below.

713990 All Other Amusement and Recreation Industries

This industry comprises establishments (except amusement parks and arcades; gambling industries; golf courses and country clubs; skiing facilities; marinas; fitness and recreational sports centers; and bowling centers) primarily engaged in providing recreational and amusement services.

Illustrative Examples:

Amusement ride or coin-operated nongambling amusement device concession operators (i.e., supplying or servicing in others' facilities)
Miniature golf courses
Archery or shooting ranges
Recreational day camps (except instructional)
Billiard or pool parlors
Recreational or youth sports teams
Boating clubs (without marinas)
Recreational sports clubs (i.e., sports teams) not operating facilities
Dance halls
Riding stables

Cross-References.

- Establishments primarily engaged in operating amusement parks and arcades are classified in Industry Group 7131, Amusement Parks and Arcades;
- Establishments primarily engaged in operating gambling facilities (except casino hotels) or providing gambling services are classified in Industry Group 7132, Gambling Industries;
- Establishments primarily engaged in operating casino hotels are classified in Industry 721120, Casino Hotels;
- Establishments primarily engaged in operating golf courses (except miniature) and country clubs are classified in Industry 713910, Golf Courses and Country Clubs;
- Establishments primarily engaged in operating skiing facilities without hotel accommodation are classified in Industry 713920, Skiing Facilities;
- Establishments primarily engaged in operating resorts where recreational facilities are combined with lodging are classified in Industry Group 7211, Traveler Accommodation;
- Establishments primarily engaged in operating marinas are classified in Industry 713930, Marinas;
- Establishments primarily engaged in operating fitness and recreational sports centers are classified in Industry 713940, Fitness and Recreational Sports Centers;
- Establishments primarily engaged in operating bowling centers are classified in Industry 713950, Bowling Centers;
- Establishments primarily engaged in operating instructional camps, such as sports camps, fine arts camps, and computer camps, are classified in Sector 61, Educational Services based on the nature of instruction;
- Independent athletes engaged in participating in sporting events before a paying audience are classified in U.S. Industry 711219, Other Spectator Sports;
- Independent athletes engaged in providing sports instruction without participating in sporting events before a paying audience are classified in Industry 611620, Sports and Recreation Instruction;
- Independent athletes exclusively engaged in endorsing products or making speeches are classified in Industry 711510, Independent Artists, Writers, and Performers;
- Establishments primarily engaged in providing scenic and sightseeing transportation are classified in Subsector 487, Scenic and Sightseeing Transportation;
- Aviation clubs primarily engaged in providing specialty air and flying services are classified in U.S. Industry 481219, Other Nonscheduled Air Transportation;
- Aviation clubs primarily engaged in advocating social and political causes are classified in U.S. Industry 813319, Other Social Advocacy Organizations; and
- Amateur, semiprofessional, or professional athletic associations or leagues are classified in Industry 813990, Other Similar Organizations (except Business, Professional, Labor, and Political Organizations).

National Totals by Year						
NAICS 7139 - Other amusement and recreation industries						
	2011	2012	2013	2014	Recent Yr. Trend	Avg. Trend (BY10)
Number of Establishments	65,178	65,135	66,419	68,008	2.39%	2.06%
Annual Payroll (\$1000)	20,312,623	20,793,905	21,780,215	22,873,080	5.02%	7.40%
Employees	1,133,352	1,159,507	1,180,143	1,216,852	3.11%	4.60%
Average Payroll Per Employee(\$)	17,922.61	17,933.40	18,455.57	18,796.93	1.85%	
	2.64%					
Average Employment Per Establishment	17.39	17.80	17.77	17.89	0.70%	2.49%

2014 Top 10 Producer States			
NAICS 7139 - Other amusement and recreation industries			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	22,873,080	68,008	1,216,852
California	2,773,108	6,305	142,443
New York	1,880,662	4,843	83,677
Florida	1,849,592	4,103	83,321
Texas	1,471,362	3,945	76,967
Illinois	918,865	2,685	48,519
Pennsylvania	903,608	2,906	53,008
New Jersey	855,318	2,289	43,043
Massachusetts	795,479	2,127	37,352
Colorado	695,672	1,460	37,644
North Carolina	688,728	2,179	39,501
Subtotal	12,832,394	32,842	645,475
% of U.S.	56.10%	48.29%	53.04%

2014 Top Western Producer States			
NAICS 7139 - Other amusement and recreation industries			
	Annual Payroll	Establishments	Paid Employees
	(\$1,000)		
Total U.S.	\$22,873,080	68,008	1,216,852
Alaska	53,289	346	2,865
Arizona	533,142	1,069	26,566
California	2,773,108	6,305	142,443
Colorado	695,672	1,460	37,644
Hawaii	150,959	284	6,383
Idaho	97,213	505	6,402
Montana	113,222	561	6,598
Nevada	205,790	476	10,246
New Mexico	97,678	344	6,384
Oregon	294,523	1,022	17,433

Utah	204,313	552	13,530
Washington	566,101	1,729	33,377
Wyoming	63,087	292	3,327
Subtotal	5,848,097	14,945	313,198
% of U.S.	25.57%	21.98%	25.74%

NAICS 7139 - Other Amusement and Recreation Industries				N = 5
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	40%	20%	0%	40%
Access within 30 minutes to package freight services	60%	40%	0%	0%
Immediate access to a railhead or rail spur	100%	0%	0%	0%
Access within 30 minutes to rail freight	100%	0%	0%	0%
Access within 30 minutes to passenger air services	40%	60%	0%	0%
Access within 30 minutes to port or harbor facilities	80%	20%	0%	0%
Access within 30 minutes to an international trade port	80%	20%	0%	0%
Access to natural gas pipeline	80%	0%	0%	20%
Access within one day, at a reasonable cost, to the supplies you need	0%	40%	20%	20%
Access within one day, at a reasonable cost, to your customers	20%	20%	20%	40%
Access to 3-phase electric power	40%	0%	20%	40%
Access to fiber optic lines	20%	40%	20%	20%
Availability of high-volume water supply	40%	0%	40%	20%
Availability of high-volume wastewater disposal	60%	0%	40%	0%
Availability of solid waste disposal	40%	0%	40%	20%
Availability of cell phone service	20%	20%	20%	40%
Availability of local public transportation	60%	20%	20%	0%
Possibility for future expansion at site	0%	60%	20%	20%
Availability of high-speed internet	0%	20%	40%	40%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	80%	0%	20%	0%
Availability of skilled workforce	0%	40%	40%	20%
Availability of technical workforce	20%	80%	0%	0%
Availability of unskilled workforce	20%	60%	0%	0%
Favorable local labor costs	0%	40%	40%	20%
Favorable worker's compensation tax rate	0%	20%	40%	40%
Favorable local business tax rates	0%	20%	40%	40%
Favorable state and local government incentives	100%	0%	0%	0%
Availability of union labor	20%	20%	20%	40%
Availability of specialized job training programs	60%	40%	0%	0%
Availability of long and short term financing	20%	40%	20%	20%
Existence of a business/trade association	40%	60%	0%	0%
Lenient environmental regulations	20%	40%	0%	40%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	40%	0%	60%
Availability of affordable housing	40%	40%	20%	0%
Clean air and water	0%	60%	20%	20%
High quality natural ecosystem	20%	60%	20%	0%
Outdoor recreation opportunities	20%	20%	40%	20%
Social and cultural opportunities	0%	80%	20%	0%
Retail shopping opportunities	60%	40%	0%	0%
Quality educational system (K-12)	40%	20%	0%	40%
Access within 30 minutes to college or university	20%	40%	20%	20%
Availability of quality healthcare	20%	60%	0%	20%
Availability of public safety services (e.g. police, fire station)	20%	20%	20%	40%
Climate	20%	20%	20%	40%
Ease of attracting skilled workers	0%	0%	0%	0%

Sector 92—Public Administration^T

The Public Administration sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area. These agencies also set policy, create laws, adjudicate civil and criminal legal cases, provide for public safety and for national defense. In general, government establishments in the Public Administration sector oversee governmental programs and activities that are not performed by private establishments. Establishments in this sector typically are engaged in the organization and financing of the production of public goods and services, most of which are provided for free or at prices that are not economically significant.

Government establishments also engage in a wide range of productive activities covering not only public goods and services but also individual goods and services similar to those produced in sectors typically identified with private-sector establishments. In general, ownership is not a criterion for classification in NAICS. Therefore, government establishments engaged in the production of private-sector-like goods and services should be classified in the same industry as private-sector establishments engaged in similar activities.

As a practical matter, it is difficult to identify separate establishment detail for many government agencies. To the extent that separate establishment records are available, the administration of governmental programs is classified in Sector 92, Public Administration, while the operation of that same governmental program is classified elsewhere in NAICS based on the activities performed. For example, the governmental administrative authority for an airport is classified in Industry 92612, Regulation and Administration of Transportation Programs, while operating the airport is classified in Industry 48811, Airport Operations. When separate records for multi-establishment companies are not available to distinguish between the administration of a governmental program and the operation of it, the establishment is classified in Sector 92, Public Administration.

Examples of government-provided goods and services that are classified in sectors other than Public Administration include: schools, classified in Sector 61, Educational Services; hospitals, classified in Subsector 622, Hospitals; establishments operating transportation facilities, classified in Sector 48-49, Transportation and Warehousing; the operation of utilities, classified in Sector 22, Utilities; and the Government Printing Office, classified in Subsector 323, Printing and Related Support Activities.

926 Administration of Economic Programs

This subsector comprises government establishments primarily engaged in the administration of economic programs.

9261 Administration of Economic Programs

92611 Administration of General Economic Programs See industry description for 926110 below.

926110 Administration of General Economic Programs

This industry comprises government establishments primarily engaged in the administration, promotion and development of economic resources, including business, industry, and tourism. Included in this industry are government establishments responsible for the development of general statistical data and analyses and promotion of the general economic well-being of the governed area.

Illustrative Examples:

Consumer protection offices, public administration
Small business development agencies, public administration
Economic development agencies, government
Trade commissions, government
General economics statistical agencies, public administration

92612 Regulation and Administration of Transportation Programs See industry description for 926120 below.

926120 Regulation and Administration of Transportation Programs

This industry comprises government establishments primarily engaged in the administration, regulation, licensing, planning, inspection, and investigation of transportation services and facilities. Included in this industry are government establishments responsible for motor vehicle and operator licensing, the Coast Guard (except the Coast Guard Academy), and parking authorities.

Cross-References. Government establishments primarily engaged in--

- Operating airports, railroads, depots, ports, toll roads and bridges, and other transportation facilities--are classified in Sector 48-49, Transportation and Warehousing;
- Operating parking lots and parking garages--are classified in Industry 812930, Parking Lots and Garages;
- Operating automobile safety inspection and emission testing facilities--are classified in Industry Group 8111, Automotive Repair and Maintenance;
- Building and/or maintaining roads and highways--are classified in Industry 237310, Highway, Street, and Bridge Construction;
- Providing air traffic control services--are classified in U.S. Industry 488111, Air Traffic Control; and
- Operating weigh stations--are classified in Industry 488490, Other Support Activities for Road Transportation.

92613 Regulation and Administration of Communications, Electric, Gas, and Other Utilities See industry description for 926130 below.

926130 Regulation and Administration of Communications, Electric, Gas, and Other Utilities

This industry comprises government establishments primarily engaged in the administration, regulation, licensing and inspection of utilities, such as communications, electric power (including fossil, nuclear, solar, water, and wind), gas and water supply, and sewerage.

Cross-References.

Government establishments primarily engaged in operating utilities are classified in Subsector 221, Utilities.

92614 Regulation of Agricultural Marketing and Commodities See industry description for 926140 below.

926140 Regulation of Agricultural Marketing and Commodities

This industry comprises government establishments primarily engaged in the planning, administration, and coordination of agricultural programs for production, marketing, and utilization, including educational and promotional activities. Included in this industry are government establishments responsible for regulating and controlling the grading and inspection of food, plants, animals, and other agricultural products.

Cross-References. Government establishments primarily engaged in--

- Administering programs for developing economic data about agricultural and trade in agricultural products--are classified in Industry 926110, Administration of General Economic Programs;
- Administering programs for the conservation of natural resources--are classified in Industry Group 9241, Administration of Environmental Quality Programs; and
- Administering food stamp programs--are classified in Industry 923130, Administration of Human Resource Programs (except Education, Public Health, and Veterans' Affairs Programs).

92615 Regulation, Licensing, and Inspection of Miscellaneous Commercial Sectors See industry description for 926150 below.

926150 Regulation, Licensing, and Inspection of Miscellaneous Commercial Sectors

This industry comprises government establishments primarily engaged in the regulation, licensing, and inspection of commercial sectors, such as retail trade, professional occupations, manufacturing, mining, construction, and services. Included in this industry are government establishments maintaining physical standards, regulating hazardous conditions not elsewhere classified, and enforcing alcoholic beverage control regulations.

Illustrative Examples:

Alcoholic beverage control boards, public administration
Labor management negotiations boards, government
Banking regulatory agencies, public administration
Licensing and permit issuance for business operations, government
Building inspections, government
Licensing and permit issuance for professional occupations, government

Insurance commissions, government
 Securities regulation commissions, public administration

Cross-References. Government establishments primarily engaged in--

- Regulating, administering, and inspecting transportation services and facilities--are classified in Industry 926120, Regulation and Administration of Transportation Programs; and
- Regulating, administering, and inspecting communications, electric, gas, and other utilities--are classified in Industry 926130, Regulation and Administration of Communications, Electric, Gas, and Other Utilities.

No available *County Business Pattern* data for NAICS 9261.

NAICS 9261 - Administration of Economic Program				N = 2
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	100%	0%	0%	0%
Access within 30 minutes to package freight services	100%	0%	0%	0%
Immediate access to a railhead or rail spur	100%	0%	0%	0%
Access within 30 minutes to rail freight	100%	0%	0%	0%
Access within 30 minutes to passenger air services	100%	0%	0%	0%
Access within 30 minutes to port or harbor facilities	100%	0%	0%	0%
Access within 30 minutes to an international trade port	100%	0%	0%	0%
Access to natural gas pipeline	50%	0%	0%	50%
Access within one day, at a reasonable cost, to the supplies you need	0%	50%	0%	50%
Access within one day, at a reasonable cost, to your customers	0%	0%	0%	100%
Access to 3-phase electric power	50%	0%	0%	50%
Access to fiber optic lines	0%	0%	50%	0%
Availability of high-volume water supply	50%	0%	0%	50%
Availability of high-volume wastewater disposal	50%	0%	0%	50%
Availability of solid waste disposal	100%	0%	0%	0%
Availability of cell phone service	0%	0%	100%	0%
Availability of local public transportation	50%	0%	50%	0%
Possibility for future expansion at site	50%	50%	0%	0%
Availability of high-speed internet	0%	0%	0%	100%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	0%	0%	50%	50%
Availability of skilled workforce	0%	0%	50%	50%
Availability of technical workforce	50%	0%	0%	50%
Availability of unskilled workforce	50%	0%	0%	50%
Favorable local labor costs	0%	50%	0%	50%
Favorable worker's compensation tax rate	0%	50%	0%	50%
Favorable local business tax rates	0%	0%	0%	100%
Favorable state and local government incentives	100%	0%	0%	0%
Availability of union labor	0%	0%	50%	50%
Availability of specialized job training programs	50%	0%	50%	0%
Availability of long and short term financing	50%	50%	0%	0%
Existence of a business/trade association	100%	0%	0%	0%
Lenient environmental regulations	50%	0%	0%	50%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	0%	100%	0%	0%
Availability of affordable housing	0%	50%	50%	0%
Clean air and water	0%	100%	0%	0%
High quality natural ecosystem	50%	50%	0%	0%
Outdoor recreation opportunities	0%	100%	0%	0%
Social and cultural opportunities	50%	50%	0%	0%
Retail shopping opportunities	50%	50%	0%	0%
Quality educational system (K-12)	0%	100%	0%	0%
Access within 30 minutes to college or university	50%	50%	0%	0%
Availability of quality healthcare	0%	100%	0%	0%
Availability of public safety services (e.g. police, fire station)	0%	50%	50%	0%
Climate	50%	50%	0%	0%
Ease of attracting skilled workers	0%	0%	0%	0%

The Area Sector Analysis Program was made possible in the West Central Mountains of Idaho through funding provided by the America's Best Communities initiative, Midas Gold, and Idaho Power. The Western Rural Development Center granted a technical assistance grant to the University of Idaho, Valley County office in partnership with the West Central Mountains Economic Development Council.

