

## Pennsylvania's Industry Clusters



Tom Wolf, Governor

## Pennsylvania's Industry Clusters



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#### Introduction

## Pennsylvania's Industry Clusters

Since 2004, Pennsylvania has defined industry clusters in the commonwealth to serve as the basis for data-driven workforce development policies. An industry cluster includes industries closely linked by common products, labor pools, technologies, supplier chains and training needs. They take on strategic importance for long-term economic planning as changes that benefit one group member will generally impact other members of the cluster.

Industry clusters are comprised of specific six-digit North American Industry Classification System, or NAICS, codes. They are mutually exclusive, so that no two clusters contain the same NAICS code.

Along with total employment and average wages, the strength of a cluster is often evaluated using a location quotient, or LQ, which compares a cluster's share of local employment with its share of national employment. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage.

## Significant Changes in Cluster Definitions

Due to the transformation and evolution of certain industries, cluster definitions are revisited regularly to ensure they are still relevant to the state. Significant changes from the most recent revision are highlighted below.

#### Inclusion of Retail and Wholesale Industries

Retail and wholesale industries were historically excluded from industry cluster definitions due to their typically low wages and high employment, which tended to water-down the strengths of impacted clusters. They do not fit together in their own cluster as they operate exclusive of one another in most instances. Not all have been added, and not every cluster includes them.

#### Pennsylvania's Industry Clusters

#### Creation of the Hospitality, Leisure & Entertainment (HLE) Cluster

This cluster was created to help evaluate the economic and workforce impact that tourism imparts to many areas across Pennsylvania. Wages tend to be low, and as a whole, Pennsylvania employs fewer than the national average in restaurants and hotels, the two industries that make up a large portion of the cluster.

#### Separation of Business Services (BSV) and Real Estate, Finance & Insurance (REFI)

The previously-defined Business & Financial Services cluster was split into two separate clusters, BSV and REFI. REFI constitutes a more specific set of industries, is more geographically distinguishable, and has a narrower set of occupations. BSV tends to be strong throughout the state (rural and urban) and has a broader occupational staffing pattern. BSV absorbed a number of industries from the old Information & Communication Services (ICS) cluster definition, and three sub-clusters were created to help further break down this cluster:

BSV – Media, Advertising & Marketing (BSV – MAM)

BSV - Operational Services (BSV - OPER)

BSV - Professional & Consulting Services (BSV - P&C)

#### Amalgamation of Clusters into Wood, Wood Products & Publishing (WWP)

Printing is a very small niche industry grouping that was previously a sub-cluster in Advanced Materials & Diversified Manufacturing (AMDM), now known as Advanced Manufacturing (AM). Publishing was another small sector included in the ICS cluster. Combining both with the previously defined Lumber, Wood & Paper cluster produced a new cluster that includes a supply chain from resource to refined product that is more relevant throughout the state; Wood, Wood Products & Publishing (WWP.)

#### Deletion of the Information & Communications Services (ICS) Cluster

The ICS cluster was relevant (based on LQ) to a few Workforce Development Areas (WDA) around Philadelphia. Its original intent was to capture the work being done around the Wall Street West initiative and to capture the new computer-related occupational codes. Overall, the bulk of the cluster was absorbed by the Business Services (BSV) cluster while the remainder went into the Wood, Wood Products & Publishing (WWP) cluster.

#### **Uses of Clusters**

As this report stated before, Industry Clusters have served as the basis for data-driven workforce development policy in Pennsylvania since 2004. In addition to general economic and workforce development analysis, two initiatives that have included industry clusters as a foundational element - High Priority Occupations (HPOs) and Industry Partnerships (IPs) – are described briefly below.

#### High Priority Occupations (HPO)

Once industry clusters are defined, the next step is to identify occupations that are important to the success and growth of the cluster, and to ensure that Pennsylvanians possess the skills required to fill them. HPOs are those occupations that are in demand locally by employers, pay a family-sustaining wage and have higher skill requirements. Combining statistical data with regional input allows for a complete picture of the actual workforce needs of the commonwealth. Today, HPOs guide the allocation of many federal training dollars, including Workforce Innovation and Opportunity Act funds through individual training accounts. An HPO methodology document is available on the CWIA website, and provides more details on this process.

#### **Industry Partnership (IPs)**

Industry clusters have also served as the foundation for the creation of IPs — employer/worker consortiums that bring together companies with similar products, markets and human resource needs. The intent — through intelligent and prudent investments — is for Pennsylvania to develop the human capital necessary for greater productivity, enlightened human resource practices and innovation, thereby helping these industries survive and grow. Most importantly, by bringing together employers committed to developing their workforce, these partnerships foster a deep and thorough understanding of employers' industries.

Pennsylvania was among the first states to extend training and career-building efforts beyond individual companies to networks of companies in specific industries. The lack of industry collaboration on training can result in a skills gap in businesses, an opportunity gap for working families and an innovation gap for many industries. Building strong IPs can close the skills, opportunity and innovation gaps, laying the foundation for broadly shared prosperity. Similar work continues in the commonwealth today through the NextGen Sector Partnerships.

#### Looking at the Data

**Table 2** (below) provides summary statistics for each industry cluster. Spotlight reports for each of the 12 industry clusters are available on the CWIA website. Included for each cluster is:

- A definition of the cluster including examples of industries that comprise it
- Employer units, employment, average annual wages and national LQ
- A map of county employment concentration
- Top employers throughout the state
- Top industries based on employment
- A graph of national LQ for each of the 22 WDAs
- The educational requirements for the workforce that constitutes the cluster
- A chart of occupations with significant employment

Table 2: Summary Statistics for PA's Industry Clusters (2017)

2017 Annual Average

Cluster (or sub-cluster) Name	Employment	National LQ	Wages
Advanced Manufacturing (AM)	432,726	1.01	\$57,638
AM - Chemicals, Rubber & Plastics (AM - CRP)	78,607	1.21	\$58,471
AM - Electronics (AM - E)	64,000	0.79	\$65,551
AM - Metals (AM - M)	129,030	1.46	\$61,856
AM - Vehicles & Vehicle Equipment (AM - VVE)	161,089	0.84	\$50,709
Agriculture & Food Production (AFP)	175,340	0.84	\$45,955
Bio-Medical (BM)	79,638	1.21	\$106,144
Building & Construction (BC)	360,878	0.94	\$58,446
Business Services (BSV)	734,266	0.99	\$85,217
BSV - Media, Advertising & Marketing (BSV - MAM)	134,146	0.89	\$85,406
BSV - Operational Services (BSV - OPER)	225,857	0.95	\$50,952
BSV - Professional & Consulting Services (BSV - P&C)	374,263	1.06	\$105,827
Education (ED)	556,761	1.01	\$51,262
Energy (ENGY)	133,907	1.16	\$81,958
Heath Care (HC)	1,050,820	1.22	\$53,410
Hospitality, Leisure & Entertainment (HLE)	616,542	0.86	\$20,782
Logistics & Transportation (LT)	246,363	1.17	\$49,757
Real Estate, Finance & Insurance (REFI)	300,547	0.94	\$85,399
Wood, Wood Products & Publishing (WWP)	102,985	1.24	\$52,528

The following pages list the specific NAICS codes that are included in each cluster. Advanced Manufacturing and Business Services have sub-cluster breakouts noted within each page.



Sub-clusters are notated where applicable; (C) signifies Chemicals, Rubber & Plastics, (E) is Electronics, (M) is Metals, and (V) is Vehicles & Vehicle Equipment.

324191	Petroleum Lubricating Oil & Grease Mfg (C)	331410	Nonferrous Metal Smelting & Refining (M)
325110	Petrochemical Mfg (C)	331420	Copper Rolling, Drawing, Extruding & Alloying (M)
325120	Industrial Gas Mfg (C)	331491	Nonferrous Metal, Except Cu & Al, Shaping (M)
325130	Synthetic Dye & Pigment Mfg (C)	331492	Secondary Processing Of Other Nonferrous (M)
325180	Other Basic Inorganic Chemical Mfg (C)	331511	Iron Foundries (M)
325191	Gum & Wood Chemical Mfg (C)	331512	Steel Investment Foundries (M)
325192	Cyclic Crude & Intermediate Mfg (C)	331513	Steel Foundries, Except Investment (M)
325194	Cyclic Crude, Intermediate & Gum & Wood Chemical Mfg (C)	331521	Aluminum Die-Casting Foundries (M)
325211	Plastics Material & Resin Mfg (C)	331522	Nonferrous Die-Casting (M)
325212	Synthetic Rubber Mfg (C)	331523	Nonferrous Metal Die-Casting Foundries (M)
325220	Artificial & Synthetic Fibers & Filaments Mfg (C)	331524	Aluminum Foundries, Except Die-Casting (M)
325510	Paint & Coating Mfg (C)	331525	Copper Foundries (Except Die-Casting) (M)
325520	Adhesive Mfg (C)	331528	Other Nonferrous Foundries Ex. Die-Cast (M)
325611	Soap & Other Detergent Mfg (C)	331529	Other Nonferrous Metal Foundries (except Die-Casting) (M)
325612	Polish & Other Sanitation Good Mfg (C)	332111	Iron & Steel Forging (M)
325613	Surface Active Agent Mfg (C)	332112	Nonferrous Forging (M)
325620	Toilet Preparation Mfg (C)	332114	Custom Roll Forming (M)
325910	Printing Ink Mfg (C)	332115	Crown & Closure Mfg (M)
325920	Explosives Mfg (C)	332116	Metal Stamping (M)
325991	Custom Compounding Of Purchased Resins (C)	332117	Powder Metallurgy Part Mfg (M)
325992	Photographic Film & Chemical Mfg (C)	332119	Metal Crown, Closure & Other Metal Stamping (M)
325998	Other Miscellaneous Chemical Product Mfg (C)	332211	Nonprecious Cutlery & Flatware (M)
326111	Plastics Bag Mfg (C)	332212	Hand & Edge Tool Mfg (M)
326112	Plastics Packaging Film & Sheet Mfg (C)	332213	Saw Blade & Handsaw Mfg (M)
326113	Nonpackaging Plastics Film & Sheet Mfg (C)	332214	Kitchen Utensil, Pot & Pan Mfg (M)
326121	Unlaminated Plastics Profile Shape Mfg (C)	332215	Metal Kitchen Cookware & Flatware Mfg (M)
326122	Plastics Pipe & Pipe Fitting Mfg (C)	332216	Saw Blade & Handtool Mfg (M)
326130	Laminated Plastics Plate, Sheet & Shapes (C)	332313	Plate Work Mfg (M)
326140	Polystyrene Foam Product Mfg (C)	332322	Sheet Metal Work Mfg (M)
326150	Urethane & Other Foam Product Mfg (C)	332410	Power Boiler & Heat Exchanger Mfg (M)
326160	Plastics Bottle Mfg (C)	332420	Metal Tank, Heavy Gauge, Mfg (M)
326191	Plastics Plumbing Fixture Mfg (C)	332431	Metal Can Mfg (M)
326192	Resilient Floor Covering Mfg (C)	332439	Other Metal Container Mfg (M)
326199	All Other Plastics Product Mfg (C)	332510	Hardware Mfg (M)
326211	Tire Mfg, Except Retreading (C)	332611	Spring (Heavy Gauge) Mfg (M)
326212	Tire Retreading (C)	332612	Spring (Light Gauge) Mfg (M)
326220	Rubber & Plastics Hose & Belting Mfg (C)	332613	Spring Mfg (M)
326291	Rubber Product Mfg For Mechanical Use (C)	332618	Other Fabricated Wire Product Mfg (M)
326299	All Other Rubber Product Mfg (C)	332710	Machine Shops (M)
331110	Iron & Steel Mills & Ferroalloy Mfg (M)	332721	Precision Turned Product Mfg (M)
331210	Iron, Steel Pipe & Tube From Purchase Steel (M)	332722	Bolt, Nut, Screw, Rivet & Washer Mfg (M)
331221	Rolled Steel Shape Mfg (M)	332811	Metal Heat Treating (M)
331222	Steel Wire Drawing (M)	332812	Metal Coating & Nonprecious Engraving (M)
331311	Alumina Refining (M)	332813	Electroplating, Anodizing & Coloring Metal (M)
331312	Primary Aluminum Production (M)	332911	Industrial Valve Mfg (M)
331313	Alumina Refining & Primary Aluminum Production (M)	332912	Fluid Power Valve & Hose Fitting Mfg (M)
331314	Secondary Smelting & Alloying Of Aluminum (M)	332913	Plumbing Fixture Fitting & Trim Mfg (M)
331315	Aluminum Sheet, Plate & Foil Mfg (M)	332919	Other Metal Valve & Pipe Fitting Mfg (M)
331316	Aluminum Extruded Product Mfg (M)	332991	Ball & Roller Bearing Mfg (M)
331318	Other Aluminum Rolling, Drawing & Extruding (M)	332992	Small Arms Ammunition Mfg (M)
331319	Other Aluminum Rolling & Drawing (M)	332993	Ammunition, Except Small Arms, Mfg (M)

222224		225224	
332994	Small Arms Mfg (M)	335921	Fiber Optic Cable Mfg (E)
332995	Other Ordnance & Accessories Mfg (M)	335929	Other Communication & Energy Wire Mfg (E)
332996	Fabricated Pipe & Pipe Fitting Mfg (M)	335932	Noncurrent-Carrying Wiring Device Mfg (E)
332997	Industrial Pattern Mfg (M)	335991	Carbon & Graphite Product Mfg (E)
332998	Metal Sanitary Ware Mfg (M)	336111	Automobile Mfg (V)
332999	All Other Miscellaneous Fabricated Metal Product Mfg (M)	336112	Light Truck & Utility Vehicle Mfg (V)
333220	Plastics & Rubber Industry Machinery (C)	336120	Heavy Duty Truck Mfg (V)
333242	Semiconductor Machinery Mfg (E)	336211	Motor Vehicle Body Mfg (V)
333249	Other Industrial Machinery Mfg (C)	336212	Truck Trailer Mfg (V)
333295	Semiconductor Machinery Mfg (E)	336213	Motor Home Mfg (V)
333316	Photographic & Photocopying Equipment Mfg (E)	336214	Travel Trailer & Camper Mfg (V)
333511	Industrial Mold Mfg (C)	336310	Motor Vehicle Gasoline Engine & Parts Mfg (V)
333512	Metal Cutting Machine Tool Mfg (M)	336320	Motor Vehicle Electrical & Electronic Equipment Mfg (V)
333513	Metal Forming Machine Tool Mfg (M)	336330	Motor Vehicle Steering & Suspension Parts (V)
333514	Special Tool, Die, Jig & Fixture Mfg (M)	336340	Motor Vehicle Brake System Mfg (V)
333515	Cutting Tool & Machine Tool Accessory Mfg (M)	336350	Motor Vehicle Power Train Components Mfg (V)
333516	Rolling Mill Machinery & Equipment (M)	336360	Motor Vehicle Seating & Interior Trim Mfg (V)
333517	Machine Tool Mfg (M)	336370	Motor Vehicle Metal Stamping (V)
333518	Other Metalworking Machinery Mfg (M)	336390	Other Motor Vehicle Parts Mfg (V)
333519	Rolling Mill & Other Metalworking Machinery Mfg (M)	336411	Aircraft Mfg (V)
333618	Other Engine Equipment Mfg (V)	336412	Aircraft Engine & Engine Parts Mfg (V)
333923	Overhead Cranes, Hoists & Monorail Systems (M)	336413	Other Aircraft Parts & Equipment (V)
333924	Industrial Truck, Trailer & Stacker Mfg (M)	336414	Guided Missile & Space Vehicle Mfg (V)
333992	Welding & Soldering Equipment Mfg (M)	336415	Space Vehicle Propulsion Units & Parts Mfg (V)
333994	Industrial Process Furnaces & Ovens (M)	336419	Other Guided Missile & Space Vehicle Parts (V)
334111	Electronic Computer Mfg (E)	336510	Railroad Rolling Stock Mfg (V)
334112	Computer Storage Device Mfg (E)	336611	Ship Building & Repairing (V)
334113	Computer Terminal Mfg (E)	336612	Boat Building (V)
334118	Computer Terminal & Other Computer Peripheral Equip. Mfg (E)	336991	Motorcycle, Bicycle & Parts Mfg (V)
334119	Other Computer Peripheral Equipment (E)	336992	Military Armored Vehicles & Tank Parts Mfg (V)
334210	Telephone Apparatus Mfg (E)	336999	All Other Transportation Equipment Mfg (V)
334220	Broadcast & Wireless Comm. Equip (E)	423110	Motor Vehicle Merchant Wholesalers (V)
334310	Audio & Video Equipment Mfg (E)	423120	New Motor Vehicle Parts Merchant Wholesalers (V)
334411	Electron Tube Mfg (E)	423130	Tire & Tube Merchant Wholesalers (C)
334412	Bare Printed Circuit Board Mfg (E)	423140	Used Motor Vehicle Parts Merchant Wholesalers (V)
334413	Semiconductors & Related Device Mfg (E)	423410	Photographic Equip. Merchant Wholesalers (E)
334414	Electronic Capacitor Mfg (E)	423510	Metal Merchant Wholesalers (M)
334415	Electronic Resistor Mfg (E)	423610	Elec. Equip. & Wiring Merchant Wholesalers (E)
334416	Electronic Coils, Transformers & Inductors (E)	423620	Electric Appliance Merchant Wholesalers (E)
334417	Electronic Connector Mfg (E)	423690	Other Electronic Parts Merchant Wholesalers (E)
334418		423830	Industrial Machinery Merchant Wholesalers (M)
334419	Printed Circuit Assembly Mfg (E)	424610	Plastics Materials Merchant Wholesalers (C)
334511	Other Electronic Component Mfg (E) Search, Detection & Navigation Instruments (E)	424690	
334513		441110	Other Chemicals Merchant Wholesalers (C)
334514	Industrial Process Variable Instruments (E)		New Car Dealers (V)
	Totalizing Fluid Meters & Counting Devices (E)	441120	Used Car Dealers (V)
334516	Analytical Laboratory Instrument Mfg (E)	441210	Recreational Vehicle Dealers (V)
334517	Irradiation Apparatus Mfg (E)	441220	Motorcycle, Boat & Other Vehicle Dealers (V)
334518	Watch, Clock & Part Mfg (E)	441310	Automotive Parts & Accessories Stores (V)
334519	Other Measuring & Controlling Device Mfg (E)	441320	Tire Dealers (C)
334611	Software Reproducing (E)	443110	Appliance, TV & Other Electronics Stores (E)
334612	Audio & Video Media Reproduction (E)	443120	Computer & Software Stores (E)
334613	Blank Magnetic & Optical Recording Media Mfg (E)	443130	Camera & Photographic Supplies Stores (E)
334614	Software & Other Recorded CD, Tape & Record Reproducing (E)	443140	Electronics & Appliance Stores (E)
335110	Electric Lamp Bulb & Part Mfg (E)	811111	General Automotive Repair (V)
335121	Residential Electric Lighting Fixture Mfg (E)	811112	Automotive Exhaust System Repair (V)
335122	Nonresidential Electric Lighting Fixture Mfg (E)	811113	Automotive Transmission Repair (V)
335129	Other Lighting Equipment Mfg (E)	811118	Other Automotive Mechanical & Elec. Repair (V)
335210	Small Electrical Appliance Mfg (E)	811121	Automotive Body & Interior Repair (V)
335220	Major Appliance Mfg (E)	811122	Automotive Glass Replacement Shops (V)
335313	Switchgear & Switchboard Apparatus Mfg (E)	811190	Other Automotive Repair & Maintenance (V)
335314	Relay & Industrial Control Mfg (E)		



111110	Soybean Farming	115113	Crop Harvesting, Primarily By Machine
111110	Oilseed, Except Soybean, Farming	115114	Other Postharvest Crop Activities
111120	Dry Pea & Bean Farming	115115	Farm Labor Contractors & Crew Leaders
111140	Wheat Farming	115116	Farm Management Services
111150	Corn Farming	115210	Support Activities For Animal Production
111160	Rice Farming	311111	Dog & Cat Food Mfg
111191	Oilseed & Grain Combination Farming	311119	Other Animal Food Mfg
111191	All Other Grain Farming	311211	Flour Milling
111211	Potato Farming	311212	Rice Milling
111211	Other Vegetable & Melon Farming	311213	Malt Mfg
111310	Orange Groves	311221	Wet Corn Milling
111310	Citrus, Except Orange, Groves	311222	Soybean Processing
111320	Apple Orchards	311223	Other Oilseed Processing
111331	Grape Vineyards	311224	Soybean & Other Oilseed Processing
111332	Strawberry Farming	311225	Fats & Oils Refining & Blending
111333	Berry, Except Strawberry, Farming	311230	Breakfast Cereal Mfg
111334	Tree Nut Farming	311311	Sugarcane Mills
111335	Fruit & Tree Nut Combination Farming	311312	Cane Sugar Refining
111339	Other Noncitrus Fruit Farming	311313	Beet Sugar Mfg
111339	Mushroom Production	311314	Sugarcane Mills
111411	Other Food Crops Grown Under Cover	311320	Confectionery Mfg, Cacao Beans
111413	Nursery & Tree Production	311330	Purchased Chocolate Confectionery Mfg
111421	Floriculture Production	311340	Nonchocolate Confectionery Mfg
111910	Tobacco Farming	311351	Chocolate & Confectionery Mfg from Cacao Beans
111930	Sugarcane Farming	311352	Confectionery Mfg from Purchased Chocolate
111930	Hay Farming	311411	Frozen Fruit & Vegetable Mfg
111940	Sugar Beet Farming	311412	Frozen Specialty Food Mfg
111991	Peanut Farming	311421	Fruit & Vegetable Canning
111998	All Other Miscellaneous Crop Farming	311422	Specialty Canning
111338	Beef Cattle Ranching & Farming	311423	Dried & Dehydrated Food Mfg
112111	Cattle Feedlots	311511	Fluid Milk Mfg
112112	Dairy Cattle & Milk Production	311512	Creamery Butter Mfg
112120	Hog & Pig Farming	311513	Cheese Mfg
112310	Chicken Egg Production	311514	Dry, Condensed & Evaporated Dairy Products
112310	Broilers & Meat Type Chicken Production	311520	Ice Cream & Frozen Dessert Mfg
112320	Turkey Production	311611	Animal, Except Poultry, Slaughtering
112340	Poultry Hatcheries	311612	Meat Processed From Carcasses
112340	Other Poultry Production	311613	Rendering & Meat Byproduct Processing
112410	Sheep Farming	311615	Poultry Processing
112420	Goat Farming	311710	Seafood Product Preparation & Packaging
112511	Finfish Farming & Fish Hatcheries	311811	Retail Bakeries
112512	Shellfish Farming	311812	Commercial Bakeries
112512	Other Aquaculture	311813	Frozen Cakes & Other Pastries Mfg
112910	Apiculture	311821	Cookie & Cracker Mfg
112920	Horses & Other Equine Production	311822	Mixes & Dough Made From Purchased Flour
112930	Fur-Bearing Animal & Rabbit Production	311823	Dry Pasta Mfg
112990	All Other Animal Production	311824	Dry Pasta & Flour Mixes Mfg from Purchased Flour
114111	Finfish Fishing	311830	Tortilla Mfg
114112	Shellfish Fishing	311911	Roasted Nuts & Peanut Butter Mfg
114119	Other Marine Fishing	311919	Other Snack Food Mfg
115112	Soil Preparation, Planting & Cultivating	311920	Coffee & Tea Mfg

311930	Flavoring Syrup & Concentrate Mfg	424420	Packaged Frozen Food Merchant Wholesalers
311941	Mayonnaise, Dressing & Sauce Mfg	424430	Dairy Product Merchant Wholesalers
311942	Spice & Extract Mfg	424440	Poultry Product Merchant Wholesalers
311991	Perishable Prepared Food Mfg	424450	Confectionery Merchant Wholesalers
311999	All Other Miscellaneous Food Mfg	424460	Fish & Seafood Merchant Wholesalers
312111	Soft Drink Mfg	424470	Meat & Meat Product Merchant Wholesalers
312112	Bottled Water Mfg	424480	Fruit & Vegetable Merchant Wholesalers
312113	Ice Mfg	424490	Other Grocery Product Merchant Wholesalers
312120	Breweries	424510	Grain & Field Bean Merchant Wholesalers
312130	Wineries	424520	Livestock Merchant Wholesalers
312140	Distilleries	424590	Other Farm Product Raw Material Merch. Whls.
312210	Tobacco Stemming & Redrying	424810	Beer & Ale Merchant Wholesalers
312221	Cigarette Mfg	424820	Wine & Spirit Merchant Wholesalers
312229	Other Tobacco Product Mfg	424910	Farm Supplies Merchant Wholesalers
312230	Tobacco Mfg	424930	Nursery & Florist Merchant Wholesalers
325311	Nitrogenous Fertilizer Mfg	424940	Tobacco & Tobacco Product Merch. Whls.
325312	Phosphatic Fertilizer Mfg	444220	Nursery, Garden & Farm Supply Stores
325314	Fertilizer, Mixing Only, Mfg	445210	Meat Markets
325320	Pesticide & Other Ag. Chemical Mfg.	445230	Fruit & Vegetable Markets
333111	Farm Machinery & Equipment Mfg	493120	Refrigerated Warehousing & Storage
333241	Food Product Machinery Mfg	493130	Farm Product Warehousing & Storage
333294	Food Product Machinery Mfg	541940	Veterinary Services
423820	Farm & Garden Equip. Merchant Wholesalers	926140	Agricultural Market & Commodity Regulation
424410	General Line Grocery Merchant Wholesalers		



325411	Medicinal & Botanical Manufacturing	339113	Surgical Appliance & Supplies Manufacturing
325412	Pharmaceutical Preparation Manufacturing	339114	Dental Equipment & Supplies Manufacturing
325413	In-Vitro Diagnostic Substance Manufacturing	339115	Ophthalmic Goods Manufacturing
325414	Other Biological Product Manufacturing	339116	Dental Laboratories
333314	Optical Instrument & Lens Manufacturing	541710	Physical, Engineering & Biological Research
334510	Electromedical Apparatus Manufacturing	541720	Social Science & Humanities Research
339111	Laboratory Apparatus & Furniture	621511	Medical Laboratories
339112	Surgical & Medical Instrument Manufacturing	621512	Diagnostic Imaging Centers



212311	Dimension Stone Mining & Quarrying	238911	Residential Site Preparation Contractors
212312	Crushed & Broken Limestone Mining	238912	Nonresidential Site Preparation Contractors
212313	Crushed & Broken Granite Mining	238991	All Other Residential Trade Contractors
212319	Other Crushed & Broken Stone Mining	238992	All Other Nonresidential Trade Contractors
212321	Construction Sand & Gravel Mining	321991	Manufactured Home, Mobile Home, Mfg
236115	New Single-Family Housing Construction	321992	Prefabricated Wood Building Mfg
236116	New Multifamily Housing Construction	324121	Asphalt Paving Mixture & Block Mfg
236117	New Housing For-Sale Builders	324122	Asphalt Shingle & Coating Materials Mfg
236118	Residential Remodelers	327110	Pottery, Ceramics & Plumbing Fixture Mfg
236210	Industrial Building Construction	327120	Clay Building Material & Refractories Mfg
236220	Commercial Building Construction	327211	Flat Glass Mfg
237110	Water & Sewer System Construction	327212	Other Pressed & Blown Glass & Glassware
237210	Land Subdivision	327310	Cement Mfg
237310	Highway, Street & Bridge Construction	327320	Ready-Mix Concrete Mfg
237990	Other Heavy Construction	327331	Concrete Block & Brick Mfg
238111	Residential Poured Foundation Contractors	327332	Concrete Pipe Mfg
238112	Nonresidential Poured Foundation Contractors	327390	Other Concrete Product Mfg
238121	Residential Structural Steel Contractors	327420	Gypsum Product Mfg
238122	Nonresidential Structural Steel Contractors	327991	Cut Stone & Stone Product Mfg
238131	Residential Framing Contractors	332311	Prefabricated Metal Buildings & Components
238132	Nonresidential Framing Contractors	332312	Fabricated Structural Metal Mfg
238141	Residential Masonry Contractors	332321	Metal Window & Door Mfg
238142	Nonresidential Masonry Contractors	332323	Ornamental & Architectural Metal Work Mfg
238151	Residential Glass & Glazing Contractors	333120	Construction Machinery Mfg
238152	Nonresidential Glass & Glazing Contractors	333411	Air Purification Equipment Mfg
238161	Residential Roofing Contractors	333412	Industrial & Commercial Fans & Blowers
238162	Nonresidential Roofing Contractors	333413	Industrial & Commercial Fan & Air Purification Equip Mfg
238171	Residential Siding Contractors	333415	AC, Refrig., & Forced Air Heating
238172	Nonresidential Siding Contractors	333921	Elevator & Moving Stairway Mfg
238191	Other Residential Exterior Contractors	337212	Custom Architectural Woodwork & Millwork
238192	Other Nonresidential Exterior Contractors	423320	Masonry Material Merchant Wholesalers
238211	Residential Electrical Contractors	423330	Roofing & Siding Merchant Wholesalers
238212	Nonresidential Electrical Contractors	423390	Other Const. Material Merchant Wholesalers
238221	Residential Plumbing & HVAC Contractors	423710	Hardware Merchant Wholesalers
238222	Nonresidential Plumbing & HVAC Contractors	423720	Plumbing Equip. Merchant Wholesalers
238291	Other Residential Equipment Contractors	423730	HVAC Equip. Merchant Wholesalers
238292	Other Nonresidential Equipment Contractors	423810	Construction Equipment Merchant Wholesalers
238311	Residential Drywall Contractors	424950	Paint & Supplies Merchant Wholesalers
238312	Nonresidential Drywall Contractors	442210	Floor Covering Stores
238321	Residential Painting Contractors	444110	Home Centers
238322	Nonresidential Painting Contractors	444120	Paint & Wallpaper Stores
238331	Residential Flooring Contractors	444130	Hardware Stores
238332	Nonresidential Flooring Contractors	444190	Other Building Material Dealers
238341	Residential Tile & Terrazzo Contractors	453930	Manufactured, Mobile, Home Dealers
238342	Nonresidential Tile & Terrazzo Contractors	541310	Architectural Services
238351	Residential Finish Carpentry Contractors	541320	Landscape Architectural Services
238352	Nonresidential Finish Carpentry Contractors	541340	Drafting Services
238391	Other Residential Finishing Contractors	541350	Building Inspection Services
238392	Other Nonresidential Finishing Contractors	541410	Interior Design Services
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Sub-clusters are notated where applicable; (M) signifies Media, Advertising & Marketing, (O) is Operational Services and (P) is Professional & Consulting Services.

423420	Office Equipment Merchant Wholesalers (O)	541380	Testing Laboratories (P)
423430	Computer & Software Merchant Wholesalers (O)	541420	Industrial Design Services (P)
423440	Other Commercial Equip. Merchant Wholesalers (O)	541430	Graphic Design Services (M)
423490	Other Professional Equip. Merchant Wholesalers (O)	541490	Other Specialized Design Services (P)
423850	Service Estab. Equip. Merchant Wholesalers (O)	541511	Custom Computer Programming Services (P)
423990	All Other Durable Goods Merchant Wholesalers (O)	541512	Computer Systems Design Services (P)
424120	Office Supplies Merchant Wholesalers (O)	541513	Computer Facilities Management Services (P)
425110	Business To Business Electronic Markets (O)	541519	Other Computer Related Services (O)
425120	Wholesale Trade Agents & Brokers (M)	541611	Administrative Management Consulting Services (P)
453210	Office Supplies & Stationery Stores (O)	541612	Human Res. Consulting Serv (P)
454110	Electronic Shopping & Mail-Order Houses (M)	541613	Marketing Consulting Services (P)
454390	Other Direct Selling Establishments (M)	541618	Other Management Consulting Services (P)
511199	All Other Publishers (M)	541620	Environmental Consulting Services (P)
511210	Software Publishers (M)	541690	Other Technical Consulting Services (P)
512110	Motion Picture & Video Production (M)	541810	Advertising Agencies (M)
512120	Motion Picture & Video Distribution (M)	541820	Public Relations Agencies (M)
512191	Teleproduction & Postproduction Services (M)	541830	Media Buying Agencies (M)
512199	Other Motion Picture & Video Industries (M)	541840	Media Representatives (M)
512133	Record Production (M)	541850	Outdoor Advertising (M)
512210	Integrated Record Production & Distribution (M)	541860	Direct Mail Advertising (M)
512230	Music Publishers (M)	541870	Advertising Material Distribution Services (M)
512240	Sound Recording Studios (M)	541890	Other Services Related To Advertising (M)
512250	Record Production & Distribution (M)	541910	Marketing Research & Public Opinion Polling (M)
512290	Other Sound Recording Industries (M)	541921	Photography Studios, Portrait (M)
515250	Radio Networks (M)	541922	Commercial Photography (M)
515111	Radio Stations (M)	541930	Translation & Interpretation Services (P)
515112	Television Broadcasting (M)	541990	All Other Professional & Technical Services (P)
	Cable & Other Subscription Programming (M)	551114	Managing Offices (P)
515210	Internet Publishing & Broadcasting (M)	561110	Office Administrative Services (P)
516110	Wired Telecommunications Carriers (O)	561210	Facilities Support Services (O)
517110	Wireless Telecommunications Carriers, Except Satellite (O)	561410	Document Preparation Services (O)
517210	Wired/Wireless Telecom Carriers, Except Satellite (O)	561421	Telephone Answering Services (O)
517310	Satellite Telecommunications (O)	561422	Telemarketing Bureaus (M)
517410	Cable & Other Program Distribution (O)	561492	Court Reporting & Stenotype Services (P)
517510	Other Telecommunications (O)	561499	All Other Business Support Services (O)
517910	Internet Service Providers (O)	561611	Investigation Services (O)
518111	• •	561612	Security Guards & Patrol Services (O)
518112	Web Search Portals (0)	561613	Armored Car Services (O)
518210	Data Processing, Hosting & Related Services (O)	561621	Security Systems Services, Except Locksmiths (O)
519110	News Syndicates (M)	561720	Janitorial Services (O)
519130	Internet Publishing & Broadcasting & Web Search Portals (M)	561730	Landscaping Services (O)
519190	All Other Information Services (M)	561910	Packaging & Labeling Services (O)
532112	Passenger Car Leasing (O)	561920	Convention & Trade Show Organizers (M)
532412	Other Heavy Machinery Rental & Leasing (O)	561990	All Other Support Services (O)
532420	Office Equipment Rental & Leasing (0)	811212	Computer & Office Machine Repair (O)
532490	Other Machinery Rental & Leasing (O)		Communication Equipment Repair (0)
533110	Lessors Of Nonfinancial Intangible Assets (O)	811213	
541110	Offices Of Lawyers (P)	811219	Other Electronic Equipment Repair (O)
541199	All Other Legal Services (P)	811310	Commercial Machinery Repair & Maintenance (O)
541214	Payroll Services (O)	813910	Business Associations (P)
541330	Engineering Services (P)	813920	Professional Organizations (P)
541360	Geophysical Surveying & Mapping Services (P)	813930	Labor Unions & Similar Labor Organizations (P)
541370	Other Surveying & Mapping Services (P)		



485410	School & Employee Bus Transportation	611513	Apprenticeship Training
519120	Libraries & Archives	611519	Other Technical & Trade Schools
611110	Elementary & Secondary Schools	611610	Fine Arts Schools
611210	Junior Colleges	611630	Language Schools
611310	Colleges & Universities	611691	Exam Preparation & Tutoring
611410	Business & Secretarial Schools	611692	Automobile Driving Schools
611420	Computer Training	611699	Miscellaneous Schools & Instruction
611430	Management Training	611710	Educational Support Services
611511	Cosmetology & Barber Schools	624410	Child Day Care Services
611512	Flight Training	923110	Administration of Education Programs



211111	Crude Petroleum & Natural Gas Extraction	333132	Oil & Gas Field Machinery & Equipment
211112	Natural Gas Liquid Extraction	333414	Heating Equipment, Except Warm Air Furnaces
211120	Crude Petroleum Extraction	333611	Turbine & Turbine Generator Set Units Mfg
211130	Natural Gas Extraction	333911	Pump & Pumping Equipment Mfg
212111	Bituminous Coal & Lignite Surface Mining	333914	Measuring, Dispensing, & Other Pumping Equipment Mfg
212112	Bituminous Coal Underground Mining	333995	Fluid Power Cylinder & Actuator Mfg
212113	Anthracite Mining	334512	Automatic Environmental Control Mfg
213111	Drilling Oil & Gas Wells	334515	Electric & Signal Test Instruments
213112	Support Activities For Oil & Gas Operations	335311	Electric Power & Specialty Transformer Mfg
213113	Support Activities For Coal Mining	335312	Motor & Generator Mfg
221111	Hydroelectric Power Generation	335911	Storage Battery Mfg
221112	Fossil Fuel Electric Power Generation	335912	Primary Battery Mfg
221113	Nuclear Electric Power Generation	335931	Current-Carrying Wiring Device Mfg
221114	Solar Electric Power Generation	335999	Miscellaneous Electrical Equipment Mfg
221115	Wind Electric Power Generation	423520	Coal & Other Mineral Merchant Wholesalers
221116	Geothermal Electric Power Generation	423930	Recyclable Material Merchant Wholesalers
221117	Biomass Electric Power Generation	424710	Petroleum Bulk Stations & Terminals
221118	Other Electric Power Generation	424720	Other Petroleum Merchant Wholesalers
221119	Other Electric Power Generation	454310	Fuel Dealers
221121	Electric Bulk Power Transmission & Control	486110	Pipeline Transportation Of Crude Oil
221122	Electric Power Distribution	486210	Pipeline Transportation Of Natural Gas
221210	Natural Gas Distribution	486910	Refined Petroleum Product Pipeline Transport.
221310	Water Supply & Irrigation Systems	562111	Solid Waste Collection
221320	Sewage Treatment Facilities	562119	Other Waste Collection
221330	Steam & Air-Conditioning Supply	562213	Solid Waste Combustors & Incinerators
237120	Oil & Gas Pipeline Construction	562219	Other Nonhazardous Waste Disposal
237130	Power & Communication System Construction	562991	Septic Tank & Related Services
324110	Petroleum Refineries	562998	Miscellaneous Waste Management Services
324199	All Other Petroleum & Coal Products Mfg	813312	Environment & Conservation Organizations
325193	Ethyl Alcohol Mfg	924110	Air, Water & Waste Program Administration
325199	All Other Basic Organic Chemical Mfg	926130	Utility Regulation & Administration
333131	Mining Machinery & Equipment Mfg		



423450	Medical Equipment Merchant Wholesalers	621498	All Other Outpatient Care Centers
423460	Ophthalmic Goods Merchant Wholesalers	621610	Home Health Care Services
424210	Druggists' Goods Merchant Wholesalers	621910	Ambulance Services
446130	Optical Goods Stores	621991	Blood & Organ Banks
446190	Other Health & Personal Care Stores	621999	Miscellaneous Ambulatory Health Care Services
524113	Direct Life Insurance Carriers	622110	General Medical & Surgical Hospitals
524114	Direct Health & Medical Insurance Carriers	622210	Psychiatric & Substance Abuse Hospitals
525120	Health & Welfare Funds	622310	Other Hospitals
532283	Home Health Equipment Rental	623110	Nursing Care Facilities (Skilled)
621111	Offices Of Physicians, Except Mental Health	623210	Residential Intellectual & Developmental Disability Facilities
621112	Offices Of Mental Health Physicians	623220	Residential Mental & Substance Abuse Care
621210	Offices Of Dentists	623311	Continuing Care Retirement Communities
621310	Offices Of Chiropractors	623312	Assisted Living Facilities for the Elderly
621320	Offices Of Optometrists	623990	Other Residential Care Facilities
621330	Offices Of Mental Health Practitioners	624110	Child & Youth Services
621340	Offices Of Specialty Therapists	624120	Services For The Elderly & Disabled
621391	Offices Of Podiatrists	624190	Other Individual & Family Services
621399	Offices Of Miscellaneous Health Practitioners	624221	Temporary Shelters
621410	Family Planning Centers	624230	Emergency & Other Relief Services
621420	Outpatient Mental Health Centers	813212	Voluntary Health Organizations
621491	HMO Medical Centers	923120	Administration Of Public Health Programs
621492	Kidney Dialysis Centers	923140	Administration Of Veterans' Affairs
621493	Freestanding Emergency Medical Centers		

# Hospitality, Leisure & Entertainment

423910	Sporting Goods Merchant Wholesalers	712120	Historical Sites
423920	Toy & Hobby Goods Merchant Wholesalers	712130	Zoos & Botanical Gardens
424310	Piece Goods Merchant Wholesalers	712190	Nature Parks & Other Similar Institutions
451110	Sporting Goods Stores	713110	Amusement & Theme Parks
451120	Hobby, Toy & Game Stores	713120	Amusement Arcades
451130	Sewing, Needlework & Piece Goods Stores	713210	Casinos, Except Casino Hotels
451140	Musical Instrument & Supplies Stores	713290	Other Gambling Industries
453220	Gift, Novelty & Souvenir Stores	713910	Golf Courses & Country Clubs
453920	Art Dealers	713920	Skiing Facilities
487110	Scenic & Sightseeing Transportation, Land	713930	Marinas
487210	Scenic & Sightseeing Transportation, Water	713940	Fitness & Recreational Sports Centers
487990	Scenic & Sightseeing Transportation, Other	713950	Bowling Centers
512131	Motion Picture Theaters, Except Drive-Ins	713990	All Other Amusement & Recreation Industries
512132	Drive-In Motion Picture Theaters	721110	Hotels & Motels, Except Casino Hotels
532284	Recreational Goods Rental	721120	Casino Hotels
561510	Travel Agencies	721191	Bed-And-Breakfast Inns
561520	Tour Operators	721199	All Other Traveler Accommodation
561591	Convention & Visitors Bureaus	721211	RV Parks & Campgrounds
561599	All Other Travel Arrangement Services	721214	Recreational & Vacation Camps
611620	Sports & Recreation Instruction	721310	Rooming & Boarding Houses
711110	Theater Companies & Dinner Theaters	722110	Full-Service Restaurants
711120	Dance Companies	722211	Limited-Service Restaurants
711130	Musical Groups & Artists	722212	Cafeterias, Grill Buffets & Buffets
711190	Other Performing Arts Companies	722213	Snack & Nonalcoholic Beverage Bars
711211	Sports Teams & Clubs	722310	Food Service Contractors
711212	Racetracks	722320	Caterers
711219	Other Spectator Sports	722330	Mobile Food Services
711310	Promoters With Facilities	722410	Drinking Places, Alcoholic Beverages
711320	Promoters Without Facilities	722511	Full-Service Restaurants
711410	Agents & Managers For Public Figures	722513	Limited-Service Restaurants
711510	Independent Artists, Writers & Performers	722514	Cafeterias, Grill Buffets & Buffets
712110	Museums	722515	Snack & Nonalcoholic Beverage Bars



481111	Scheduled Passenger Air Transportation	485510	Charter Bus Industry
481112	Scheduled Freight Air Transportation	485990	Other Ground Passenger Transportation
481211	Nonscheduled Air Passenger Chartering	486990	All Other Pipeline Transportation
481212	Nonscheduled Air Freight Chartering	488111	Air Traffic Control
481219	Other Nonscheduled Air Transportation	488119	Other Airport Operations
482111	Line-Haul Railroads	488190	Other Support Activities For Air Transport.
482112	Short Line Railroads	488210	Support Activities For Rail Transportation
483111	Deep Sea Freight Transportation	488310	Port & Harbor Operations
483112	Deep Sea Passenger Transportation	488320	Marine Cargo Handling
483113	Coastal & Great Lakes Freight Transport.	488330	Navigational Services To Shipping
483114	Coastal & Great Lakes Passenger Transport.	488390	Other Support Activities For Water Transport.
483211	Inland Water Freight Transportation	488410	Motor Vehicle Towing
483212	Inland Water Passenger Transportation	488490	Other Support Activities For Road Transport.
484110	General Freight Trucking, Local	488510	Freight Transportation Arrangement
484121	General Freight Trucking, Long-Distance TL	488991	Packing & Crating
484122	General Freight Trucking, Long-Distance LTL	488999	All Other Support Activities For Transport.
484210	Used Household & Office Goods Moving	492110	Couriers
484220	Other Specialized Trucking, Local	492210	Local Messengers & Local Delivery
484230	Other Specialized Trucking, Long-Distance	493110	General Warehousing & Storage
485111	Mixed Mode Transit Systems	493190	Other Warehousing & Storage
485112	Commuter Rail Systems	531130	Miniwarehouses & Self-Storage Units
485113	Bus & Other Motor Vehicle Transit Systems	532111	Passenger Car Rental
485119	Other Urban Transit Systems	532120	Truck, Trailer & RV Rental & Leasing
485210	Interurban & Rural Bus Transportation	532411	Transportation Equipment Rental & Leasing
485310	Taxi Service	541614	Process & Logistics Consulting Services
485320	Limousine Service	562112	Hazardous Waste Collection



521110	Monetary Authorities - Central Bank	524130	Reinsurance Carriers
522110	Commercial Banking	524210	Insurance Agencies & Brokerages
522120	Savings Institutions	524291	Claims Adjusting
522130	Credit Unions	524292	Third Party Administration Of Insurance Funds
522190	Other Depository Credit Intermediation	524298	All Other Insurance Related Activities
522210	Credit Card Issuing	525110	Pension Funds
522220	Sales Financing	525190	Other Insurance Funds
522291	Consumer Lending	525910	Open-End Investment Funds
522292	Real Estate Credit	525920	Trusts, Estates & Agency Accounts
522293	International Trade Financing	525930	Real Estate Investment Trusts
522294	Secondary Market Financing	525990	Other Financial Vehicles
522298	All Other Nondepository Credit Intermediation	531110	Lessors of Residential Buildings
522310	Mortgage & Nonmortgage Loan Brokers	531120	Lessors of Nonresidential Buildings
522320	Financial Transaction Processing & Clearing	531190	Lessors of Other R.E. Property
522390	Other Credit Intermediation Activities	531210	Offices Of Real Estate Agents & Brokers
523110	Investment Banking & Securities Dealing	531311	Residential Property Managers
523120	Securities Brokerage	531312	Nonresidential Property Managers
523130	Commodity Contracts Dealing	531320	Offices Of Real Estate Appraisers
523140	Commodity Contracts Brokerage	531390	Other Activities Related To Real Estate
523210	Securities & Commodity Exchanges	541191	Title Abstract & Settlement Offices
523910	Miscellaneous Intermediation	541211	Offices Of Certified Public Accountants
523920	Portfolio Management	541219	Other Accounting Services
523930	Investment Advice	551111	Offices Of Bank Holding Companies
523991	Trust, Fiduciary & Custody Activities	551112	Offices Of Other Holding Companies
523999	Miscellaneous Financial Investment Activities	561440	Collection Agencies
524126	Direct Property & Casualty Insurers	561450	Credit Bureaus
524127	Direct Title Insurance Carriers	561491	Repossession Services
524128	Other Direct Insurance Carriers		



113110	Timber Tract Operations	322220	Paper Bag & Coated & Treated Paper Mfg
113210	Forest Nursery & Gathering Forest Products	322230	Stationery Product Mfg
113310	Logging	322291	Sanitary Paper Product Mfg
115310	Support Activities For Forestry	322299	All Other Converted Paper Product Mfg
321113	Sawmills	323110	Printing
321114	Wood Preservation	323120	Support Activities For Printing
321211	Hardwood Veneer & Plywood Mfg	333210	Sawmill & Woodworking Machinery
321212	Softwood Veneer & Plywood Mfg	333243	Sawmill, Woodworking & Paper Machinery Mfg
321213	Engineered Wood Member Mfg	333244	Printing Machinery & Equipment Mfg
321214	Truss Mfg	333291	Paper Industry Machinery Mfg
321219	Reconstituted Wood Product Mfg	333293	Printing Machinery & Equipment
321911	Wood Window & Door Mfg	337110	Wood Kitchen Cabinet & Countertop Mfg
321912	Cut Stock, Resawing Lumber & Planing	337122	Nonupholstered Wood Household Furniture Mfg
321918	Other Millwork, Including Flooring	337129	Wood TV, Radio, & Sewing Machine Housing
321920	Wood Container & Pallet Mfg	337211	Wood Office Furniture Mfg
321999	All Other Miscellaneous Wood Product Mfg	423310	Lumber & Wood Merchant Wholesalers
322110	Pulp Mills	424110	Printing & Writing Paper Merch. Whls.
322121	Paper, Except Newsprint, Mills	424130	Industrial Paper Merchant Wholesalers
322122	Newsprint Mills	424920	Book & Periodical Merchant Wholesalers
322130	Paperboard Mills	451211	Book Stores
322211	Corrugated & Solid Fiber Box Mfg	451212	News Dealers & Newsstands
322212	Folding Paperboard Box Mfg	511110	Newspaper Publishers
322213	Setup Paperboard Box Mfg	511120	Periodical Publishers
322214	Fiber Can, Tube & Drum Mfg	511130	Book Publishers
322215	Nonfolding Food Container Mfg	511140	Directory & Mailing List Publishers
322219	Other Paperboard Container Mfg	511191	Greeting Card Publishers