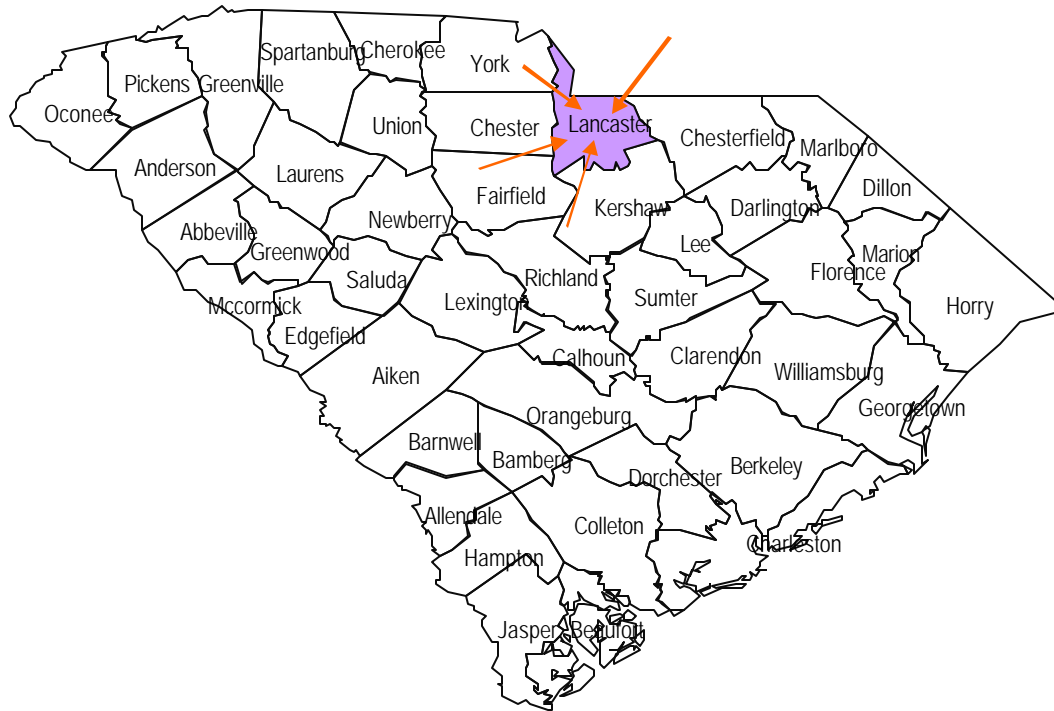


Targeting Growth Opportunities for Lancaster County, 2002



REDRL Research Report 10-2002-04

by

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in cooperation with

Clemson Institute for Economic & Community Development,

Sandhill Research & Education Center



Clemson University Public Service Activities

Table 4. Non-farm Employment Change by Major Industry Divisions: Lancaster County, Adjacent Counties, and South Carolina, 1990-1999

	Lancaster County			Adjacent S.C. Counties			South Carolina		
	EMP 1990	EMP 1999	% Change	EMP 1990	EMP 1999	% Change	EMP 1990	EMP 1999	% Change
Agric., Forestry, Fisheries	130	155	19.2%	1,138	1,318	15.8%	15,831	25,357	60.2%
Mining	35	26	-25.7	385	149	-61.3	2,639	2,558	-3.1
Construction	1,419	1,578	11.2	7,166	9,231	28.8	133,808	54,166	15.2
Manufacturing	7,882	6,836	-13.3	38,775	32,836	-15.3	389,514	351,608	-9.7
Trans. & PU	521	496	-4.8	6,045	6,521	3.4	73,858	102,215	38.4
Wholesale Trade	485	513	5.8	3,206	6,307	96.7	66,371	85,765	29.2
Retail Trade	4,032	4,388	8.8	19,247	25,305	31.5	332,240	414,007	24.6
FIRE	1,003	1,430	42.6	4,539	6,202	36.6	109,145	144,127	32.1
Service	3,734	5,692	52.4	21,345	34,256	60.5	405,071	587,254	45.0
Government	2,951	3,132	6.1	16,896	20,867	23.5	361,052	372,005	3.0
Total Non-farm	22,192	24,246	9.3	121,698	144,769	19.0	1,889,529	2,239,064	18.5

Source: U. S. Department of Commerce, BEA, Regional Accounts Data.

Table 5. Manufacturing Employment Shares by Major Group; Lancaster County and the United States, 1999

Major Group	SIC	<u>Lancaster County</u>	<u>United States</u>
		% of Mfg. Employment	% of Mfg. Employment
Food/Kindred Products	20	2.54	9.17
Tobacco	21	0.00	.19
Textile Mill	22	44.25	2.88
Apparel/Other Textiles	23	23.00	3.43
Lumber & Wood Products	24	1.55	4.47
Furniture & Fixtures	25	.04	3.01
Paper & Allied Products	26	0.00	3.55
Printing/Publishing	27	1.06	8.35
Chemical & Allied	28	.22	5.60
Petroleum & Coal	29	.41	.69
Rubber/Miscellaneous Plastics	30	2.06	5.49
Leather	31	0.00	.38
Stone, Clay & Glass	32	2.23	3.14
Primary Metal	33	.22	3.80
Fabricated Metal	34	1.76	8.34
Industrial Machinery	35	1.24	11.46
Electronic Equipment	36	16.61	9.30
Transportation Equipment	37	.83	10.05
Instruments & Related Products	38	.24	4.57
Misc. Manufacturing	39	1.73	2.12

Source: ES202 Data Files.

Table 6. Rankings of Manufacturing Industries (2-digit SIC) by 1988 Employment and 1988- 1999 Employment Change, Lancaster County

Rank (1988)	Industry	SIC	1988 Employment	1999 Employment	Rank	Industry	SIC	Employment Change
1	Textile Mill	22	4,198	2,992	1	Misc. Manufacturing	39	98
2	Apparel/Other Textiles	23	1,956	1,555	2	Rubber/Misc. Plastics	30	78
3	Electronic Equipment	36	1,331	1,123	3	Lumber & Wood	24	70
4	Fabricated Metal	34	372	119	4	Food/Kindred	20	47
5	Transportation Equipment	37	173	56	5	Petroleum & Coal	29	16
6	Industrial Machinery	35	151	84	6	Instruments & Related	38	16
7	Stone, Clay, & Glass	32	142	151	7	Chemical & Allied	28	11
8	Food/Kindred	20	125	172	8	Stone, Clay, & Glass	32	9
9	Printing/Publishing	27	75	72	9	Primary Metal	33	7
10	Rubber/Misc. Plastics	30	61	139	10	Furniture & Fixtures	25	3
11	Lumber & Wood	24	35	105	11	Tobacco	21	0
12	Misc. Manufacturing	39	19	117	12	Paper & Allied	26	0
13	Petroleum & Coal	29	12	28	13	Leather	31	0
14	Primary Metal	33	8	15	14	Printing/Publishing	27	-3
15	Chemical & Allied	28	4	15	15	Industrial Machinery	35	-67
16	Tobacco	21	0	0	16	Transportation Equipment	37	-117
17	Furniture & Fixtures	25	0	3	17	Electronic Equipment	36	-208
18	Paper & Allied	26	0	0	18	Fabricated Metal	34	-253
19	Leather	31	0	0	19	Apparel/Other Textiles	23	-401
20	Instruments & Related	38	0	16	20	Textile Mill	22	-1,206

IDENTIFYING HIGH POTENTIAL – HIGH IMPACT INDUSTRIES FOR TARGETING

The objective of the REDRL industry targeting program is two-fold.

- Identifying manufacturing industries that have high potentials for locating in a county.**
- Identify manufacturing industries that provide attractive economic development impacts in terms of future job growth, wages paid, and contributions to the local tax base.**

The targeting methodology focuses on identifying expanding and emerging industry clusters in a region.

INDUSTRY CLUSTER:

A geographically bounded collection of similar and related firms.

A. Horizontal Cluster:

Firms are in the “same” industry (e.g., textiles, furniture, or auto parts).

B. Vertical Cluster:

Firms are linked through buy-sell relationships (e.g., auto parts and auto assembly plant).

C. Labor Pooling Cluster:

Firms are linked through their need for labor with specific skills or education

WHY TARGET INDUSTRY CLUSTERS?

- The presence of an industry cluster in the area is evidence that the location is attractive to these types of manufacturers.
- The multiplier effects associated with attracting new firms to a cluster generally are greater than those resulting from noncluster firms.
- Members of industry clusters have stronger employment growth over time than firms that are not in clusters.
- Industry clusters have greater potential for new firm spin-offs than groupings of unrelated firms.

SELECTION CRITERIA

Industry clusters in the regional economy are targeted at the four-digit SIC level. A screening criteria is used to identify the most promising manufacturing clusters in the region.

1. Five or more establishments in the region in 1999.
2. Regional industry employment was greater than 400 in 1999.
3. Industry employment in the region increased from 1988 to 1999.
4. Industry Location Quotient (LQ) for the region exceeded 1.50 in 1999 and increased from 1988 to 1999.

Table 14. Industry Clusters in Lancaster County and Adjacent Counties

I. Lancaster County

A. Negative U.S. Employment Change, 1988-1999

1. 2221	Broad woven Fabrics, Manmade
1999 Employment	1641
1999 Establishments	10
U.S. Employment Change Rank	393 (-37%)

II. Lancaster and Adjacent Counties

A. Positive U.S. Employment Change, 1988-1999

1. 3714	Motor Vehicle Parts & Accessories
1999 Employment	1572
1999 Establishments	9
U.S. Employment Change Rank	39 (+38%)
2. 3273	Ready Mix Concrete
1999 Employment	414
1999 Establishments	14
U.S. Employment Change Rank	92 (+20%)
3. 2261	Finishing Plants, Cotton
1999 Employment	433
1999 Establishments	11
U.S. Employment Change Rank	98 (+18%)
4. 3471	Metal Plating and Polishing
1999 Employment	395
1999 Establishments	5
U.S. Employment Change Rank	119 (+13%)
5. 2392	Household Furnishings, NEC
1999 Employment	1907
1999 Establishments	8
U.S. Employment Change Rank	152 (+7%)
6. 3496	Misc. Fabricated Wire Products
1999 Employment	747
1999 Establishments	5
U.S. Employment Change Rank	173 (+4%)

Table 14. (continued)

B. [Negative U.S. Employment Change 1988-1999](#)

1. 2411	Logging
1999 Employment	526
1999 Establishments	100
U.S. Employment Change Rank	284 (-13%)
2. 3541	Machine Tools, Metal Cutting
1999 Employment	630
1999 Establishments	5
U.S. Employment Change Rank	305 (-17%)

III. Lancaster and Adjacent Counties: Emerging Clusters

A. [Positive U.S. Employment Change, 1988-1999](#)

1. 2448	Wood Pallets
1999 Employment	246
1999 Establishments	4
U.S. Establishments	18 (+54%)
2. 3281	Cut Stone and Stone Products
1999 Employment	140
1999 Establishments	5
U.S. Employment Change Rank	34 (+41%)
3. 3993	Signs and Advertising Specialties
1999 Employment	126
1999 Establishments	8
U.S. Employment Change Rank	54 (+30%)
4. 3231	Products of Purchased Glass
1999 Employment	346
1999 Establishments	4
U.S. Employment Change Rank	82 (+22%)

B. [Negative U.S. Employment Change, 1988-1999](#)

1. 3443	Fabricated Plate Work
1999 Employment	187
1999 Establishments	6
U.S. Employment Change Rank	204 (-1%)

Table 14. (continued)

2. 2821	Plastics Materials and Resins
1999 Employment	236
1999 Establishments	3
U.S. Employment Change Rank	227 (-5%)
3. 3562	Ball and Roller Bearings
1999 Employment	1951
1999 Establishments	3
U.S. Employment Change Rank	231 (-5%)
4. 3069	Fabricated Rubber Products, NEC
1999 Employment	205
1999 Establishments	4
U.S. Employment Change Rank	254 (-9%)
5. 2899	Chemical Preparations, NEC
1999 Employment	138
1999 Establishments	6
U.S. Employment Change Rank	291 (-14%)
6. 2679	Converted Paper Products, NEC
1999 Employment	430
1999 Establishments	3
U.S. Employment Change Rank	369 (-30%)

Table 16. Industry Clusters in Mecklenburg County, NC

A. Positive U.S. Employment Change, 1988-1999

1. 3672	Printed Circuit Boards
1999 Employment	2221
1999 Establishments	4
U.S. Employment Change Rank	14 (+62%)
2. 2741	Miscellaneous Publishing
1999 Employment	1370
1999 Establishments	31
U.S. Employment Change Rank	77 (+23%)
3. 3081	Unsupported Plastics Film & Sheet
1999 Employment	825
1999 Establishments	7
U.S. Employment Change Rank	81 (+22%)
4. 2653	Corrugated & Solid Fiber Boxes
1999 Employment	1270
1999 Establishments	13
U.S. Employment Change Rank	93 (+19%)
5. 2843	Surface Active Agents
1999 Employment	802
1999 Establishments	12
U.S. Employment Change Rank	99 (+18%)
6. 3842	Surgical Appliances & Supplies
1999 Employment	602
1999 Establishments	11
U.S. Employment Change Rank	122 (+13%)

B. Negative U.S. Employment Change 1988-1999

1. 3443	Fabricated Plate Work
1999 Employment	538
1999 Establishments	10
U.S. Employment Change Rank	204 (-1%)
2. 3321	Gray & Ductile Iron Foundries
1999 Employment	571
1999 Establishments	4
U.S. Employment Change Rank	256 (-9%)

Table 16. (Continued)

3. 2869	Industrial Organic Chemicals, NEC
1999 Employment	599
1999 Establishments	4
U.S. Employment Change Rank	290 (-14%)
4. 2086	Bottled & Canned Soft Drinks
1999 Employment	1314
1999 Establishments	7
U.S. Employment Change Rank	296 (-15%)
5. 2657	Folding Paperboard Boxes
1999 Employment	824
1999 Establishments	11
U.S. Employment Change Rank	294 (-15%)
6. 2824	Organic Fibers, Noncellulosic
1999 Employment	722
1999 Establishments	4
U.S. Employment Change Rank	391 (-37%)

Table 17. Emerging Industry Clusters in Mecklenburg County, NC

A. [Positive U.S. Employment Change, 1988-1999](#)

1. 2796	Platemaking Services
1999 Employment	318
1999 Establishments	8
U.S. Employment Change Rank	115 (+14%)
2. 2273	Carpets & Rugs
1999 Employment	446
1999 Establishments	3
U.S. Employment Change Rank	127 (+12%)

B. [Negative U.S. Employment Change, 1988-1999](#)

1. 3554	Paper Industries Machinery
1999 Employment	382
1999 Establishments	7
U.S. Employment Change Rank	206 (-1%)
2. 2096	Potato Chips & Snacks
1999 Employment	821
1999 Establishments	3
U.S. Employment Change Rank	222 (-4%)
3. 3562	Ball & Roller Bearings
1999 Employment	341
1999 Establishments	13
U.S. Employment Change Rank	231 (-5%)
4. 3069	Fabricated Rubber Products, NEC
1999 Employment	336
1999 Establishments	8
U.S. Employment Change Rank	254 (-9%)
5. 3546	Power-Driven Handtools
1999 Employment	308
1999 Establishments	3
U.S. Employment Change Rank	269 (-11%)
6. 2782	Blankbooks & Looseleaf Binders
1999 Employment	236
1999 Establishments	4
U.S. Employment Change Rank	385 (-35%)

Screening Industry Clusters

- A. Delete Clusters in Textiles (SIC 22) and Apparel (SIC 23)
(2221, 2261, 2273, 2392)**
- B. Delete Industries Dependent on Natural Resources
(2411, 2448)**
- C. Delete Mecklenburg County Manufacturing Clusters
for which Employment Declined in Lancaster and
Adjacent SC Counties
(2086, 2096, 2653, 2824, 2843, 2869, 2741, 3273)**

Table 19. U.S. Employment Change for Selected Industries, 1988 to 1999

SIC	Industry	1988 to 1999 Employment Change
3672	Printed Circuit Boards	+62%
3281	Cut Stone and Stone Products	+41%
3714	Motor Vehicle Parts & Accessories	+38%
3993	Signs and Advertising Specialties	+30%
3231	Products of Purchased Glass	+22%
3081	Unsupported Plastics Film	+22%
2796	Platemaking Services	+14%
3471	Metal Plating and Polishing	+13%
3842	Surgical Appliances & Supplies	+13%
3496	Miscellaneous Fabricated Wire Products	+4%
3443	Fabricated Plate Work (Boiler Shops)	-1%
3554	Paper Industries Machinery	-1%
2821	Plastics Materials & Resins	-5%
3562	Ball and Roller Bearings	-5%
3069	Fabricated Rubber Products, NEC	-9%
3321	Gray & Ductile Iron Foundries	-9%
3546	Power-Driven Hand Tools	-11%
2899	Chemical Preparations, NEC	-14%
3541	Machine Tools, Metal Cutting	-17%
2657	Folding Paperboard Boxes	-15%
2679	Converted Paper Products, NEC	-30%
2782	Blankbooks & Looseleaf Binders	-35%

Source: ES202 Data

**Table 20. Average Establishment Size for U.S. Manufacturers
for the Selected Industry Clusters, 1997**

SIC	Industry	Average Establishment Size (# of employees)
3562	Ball & Roller Bearings	199
3321	Gray & Ductile Iron Foundries	123
2821	Plastics Material & Resins	116
3714	Motor Vehicle Parts & Accessories	115
2657	Folding Paperboard Boxes	87
3546	Power-Driven Hand Tools	78
3541	Machine Tools, Metal Cutting	74
3842	Surgical Appliances & Supplies	68
3081	Unsupported Plastics Film & Sheets	66
2679	Converted Paper Products, NEC	62
2782	Blankbooks & Looseleaf Binders	55
2899	Chemical Preparations, NEC	53
3672	Printed Circuit Boards	52
3554	Paper Industries Machinery	50
3443	Fabricated Plate Work (Boiler Shops)	43
3496	Miscellaneous Fabricated Wire Products	41
3231	Products of Purchased Glass	37
3069	Fabricated Rubber Products, NEC	35
3471	Metal Plating & Polishing	22
2796	Platemaking Services	16
3993	Signs & Advertising Specialties	15
3281	Cut Stone & Stone Products	13

Source: 1997 U.S. Census of Manufacturers.

Table 21. Average U.S. Hourly Wages for Production Workers for Selected Industries, 1997

SIC	Industry	Average Hourly Wage (\$)
2821	Plastics Materials & Resins	\$21.50
2899	Chemical Preparations, NEC	19.00
3541	Machine Tools, Metal Cutting	17.80
3554	Paper industries Machinery	17.60
2796	Platemaking Services	17.40
3714	Motor Vehicle Parts & Accessories	17.20
3562	Ball & Roller Bearings	16.40
3321	Gray & Ductile Iron Foundries	16.20
3081	Unsupported Plastics Film & Sheets	14.30
3842	Surgical Appliances & Supplies	13.80
2657	Folding Paperboard Boxes	13.60
3443	Fabricated Plate Work (Boiler Shops)	13.50
2679	Converted Paper Products, NEC	13.40
2782	Blankbooks & Looseleaf Binders	13.30
3546	Power-Driven Hand Tools	13.10
3231	Products of Purchased Glass	12.80
3281	Cut Stone & Stone Products	12.20
3496	Miscellaneous Fabricated Wire Products	11.80
3672	Printed Circuit Boards	11.80
3993	Signs & Advertising Specialties	11.70
3471	Metal Plating & Polishing	11.40
3069	Fabricated Rubber Products, NEC	11.10

Table 23. Income Multipliers for Lancaster County for the 22 Cluster Industries, 2002

SIC	IMPLAN Sector Used	Industry	Multiplier (IMPLAN)
3471	288*	Metal Plating and Polishing	1.46
3842	408	Surgical Appliances & Supplies	1.46
3443	288*	Fabricated Plate Work (Boiler Shp)	1.46
3714	386	Motor Vehicle Parts & Accessories	1.42
3672	359*	Printed Circuit Boards	1.41
3562	331*	Ball & Roller Bearings	1.39
2899	209	Chemical Preparations, NEC	1.37
2821	209*	Plastics, Materials, & Resins	1.37
2796	178*	Platemaking Services	1.32
3281	233*	Cut Stone & Stone Products	1.32
3069	220*	Fabricated Rubber Products, NEC	1.31
3081	220	Unsupported Plastics Film	1.31
3231	220*	Products of Purchased Glass	1.30
3554	338*	Paper Industries Machinery	1.30
3993	429	Signs & Advertising Specialties	1.27
3321	259	Gray & Ductile Iron Foundries	1.27
2657	164	Folding Paperboard Boxes	1.27
2679	164*	Converted Paper Products, NEC	1.27
2782	164*	Blankbooks & Looseleaf Binders	1.27
3541	319*	Machine Tools, Metal Cutting	1.26
3496	304	Misc. Fabricated Wire Products	1.22
3546	321*	Power-Driven Hand Tools	1.21

*The IMPLAN sector for this SIC was not available in Lancaster County. The IMPLAN sector listed (denoted with a *) is the industry in Lancaster County that most closely resembles the missing SIC industry. We are assuming that the missing industry and the "similar" industry will have similar multiplier effects.

Table 27. General Rankings of Lancaster County Clusters for Selected Economic Variables

■ = Top Third ■ = Middle Third ■ = Bottom Third

SIC	Industry	Employment Growth Rate	Mean	Average Wage Rate	Income Multiplier
			Establishment Size		
3714	Motor Vehicle Parts & Accessories	■	■	■	■
3562	Ball & Roller Bearings	■	■	■	■
2821	Plastics Materials & Resins	■	■	■	■
3672	Printed Circuit Boards	■	■	■	■
2796	Platemaking Services	■	■	■	■
3842	Surgical Appliances & Supplies	■	■	■	■
3443	Fabricated Plate Work (Boiler Shops)	■	■	■	■
3321	Gray & Ductile Iron Foundries	■	■	■	■
3081	Unsupported Plastics Film & Sheets	■	■	■	■
3554	Paper Industries Machinery	■	■	■	■
2899	Chemical Preparations, NEC	■	■	■	■
3471	Metal Plating & Polishing	■	■	■	■
3541	Machine Tools, Metal Cutting	■	■	■	■
3281	Cut Stone & Stone Products	■	■	■	■
3231	Products of Purchased Glass	■	■	■	■
2657	Folding Paperboard Boxes	■	■	■	■
3546	Power-Driven Hand Tools	■	■	■	■
3993	Signs & Advertising Specialties	■	■	■	■
2679	Converted Paper Products, NEC	■	■	■	■
2782	Blankbooks & Looseleaf Binders	■	■	■	■
3069	Fabricated Rubber Products, NEC	■	■	■	■
3496	Miscellaneous Fabricated Wire Products	■	■	■	■

Table 31. General Rankings of Industries Selected for Import Substitution

■ = Top Third ■ = Middle Third ■ = Bottom Third

SIC	Industry	Employment Growth Rate	Mean	
			Establishment Size	Average Wage Rate
3714	Motor Vehicle Parts & Accessories	■	■	■
3599	Industrial Machinery, NEC	■	■	■
3561/3	Pumps and Compressors	■	■	■
3499	Fabricated Metal Products, NEC	■	■	■
3444	Sheet Metal Work	■	■	■
3081/9	Miscellaneous Plastics Products	■	■	■
3442	Metal Doors	■	■	■
3443	Fabricated Plate Work (Boiler Shops)	■	■	■
3061/9	Fabricated Rubber Products, NEC	■	■	■
3272	Concrete Products	■	■	■

Table 32. Establishments Started in the Southeast Since 1990, Establishment Employment was 50 or More in 2002.*

SIC	Industry	Nonmetro Location	Metro Location	Total
2657	Folding Paperboard Boxes	2	5	7
2679	Converted Paper Products, NEC	8	18	26
2782	Blankbooks & Looseleaf Binders	4	4	8
2796	Platemaking Services	0	4	4
2821	Plastics Materials & Resins	7	14	21
2899	Chemical Preparations, NEC	4	10	14
3061/9	Fabricated Rubber Products, NEC	11	2	13
3081	Unsupported Plastics Film & Sheets	4	5	9
3089	Miscellaneous Plastics Products	60	76	136
3231	Products of Purchased Glass	7	6	13
3272	Concrete Products	4	16	20
3281	Cut Stone & Stone Products	2	4	6
3321	Gray & Ductile Iron Foundries	3	0	3
3442	Metal Doors	7	10	17
3443	Fabricated Plate Work (Boiler Shops)	6	17	23
3444	Sheet Metal Work	14	36	50
3471	Metal Plating & Polishing	3	2	5
3496	Miscellaneous Fabricated Wire Products	5	3	8
3499	Fabricated Metal Products, NEC	6	7	13
3541	Machine Tools, Metal Cutting	1	0	1
3546	Power-Driven Hand Tools	1	3	4
3554	Paper Industries Machinery	0	1	1
3561/3	Pumps and Compressors	3	5	8
3562	Ball & Roller Bearings	0	1	1
3599	Industrial Machinery, NEC	13	20	33
3672	Printed Circuit Boards	1	12	13
3714	Motor Vehicle Parts & Accessories	50	44	94
3842	Surgical Appliances & Supplies	3	6	9
3993	Signs & Advertising Specialties	6	17	23

*Southeast includes Alabama, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia.

Table D. Recommended Target Industries for Lancaster County, South Carolina

A. Preferred Targets

Industry Clusters

Plastic Materials and Resins (2821)
Fabricated Plate Work (3443)
Printed Circuit Boards (3672)
Motor Vehicle Parts and Accessories (3714)
Surgical Appliances and Supplies (3842)
Household Furnishings, NEC (2392)

Import Substitution

Miscellaneous Plastics Products (3081 and 3089)
Sheet Metal Work (3444)
Fabricated Metal Products, NEC (3499)
Industrial Machinery, NEC (3599)

B. Secondary Targets

Industry Clusters

Converted Paper Products, NEC (2679)
Chemical Preparations, NEC (2899)
Fabricated Rubber Products (3061 and 3069)
Products of Purchased Glass (3231)
Signs and Advertising Specialties (3993)

Import Substitution

Concrete Products (3272)
Metal Doors (3442)

Harris InfoSource Database

Primary SIC	3842
Company/Institution Name	Arthrotek Inc
HQ Description	Branch
Ownership Description	Public
Mail Address	PO Box 587
Mail City	Warsaw
Mail State	IN
Mail Zip	46581-0587
Mail County	San Bernardino
Street Address	4861 E Airport Dr
Street City	Ontario
Street State	CA
Street Zip	91761-7819
Phone	909-390-0356
FAX	909-390-0364
Web Address	www.biomet.com
Long Company/Institution Name	Arthrotek Inc
Actual Sales Value	\$1,070,000,000
Sales Range Description	\$5MM-\$9.9MM
Stock Ticker	BMET
Foreign Trade Description	Export
Year Established	1990
D&B® Credit Class Value	3
Emp Count (Individual Site)	45
Emp Count (All sites)	2,085
SIC #2 Description	
Primary NAICS Description	339113 Surgical Appliance & Supplies Manufacturing
NAICS #2 Description	
Product Category #1 Description	400800 ORTHOPEDIC & SURGICAL APPLIANCES
Ranked Executive #1 Full Name w/ Tit	Mr Joel Pratt, President
Full Name w/ Tit Ranked Executive #2	Mr Greg Hartman, Treasurer
Harris ID	9104105
D-U-N-S® Number Value	627100159

**Table A. 22 Anderson County and Upstate
South Carolina Clusters, 1998-2004**

<u>SIC</u>	<u>Industry</u>	<u>New Targets</u>	<u>New Other</u>	<u>3-Digit</u>
3714	Motor Vehicle Parts and Accessories	3		4
2297	Nonwoven Fabrics			
2834	Pharmaceutical Preparations			
2843	Surface Active Agents			
3089	Plastics Products, NEC	6		7
3511	Turbines and Turbine Generator Sets	3		3
2281	Yarn Spinning Mills			
2821	Plastics Materials and Resins	2		3
3562	Ball and Roller Bearings			
3675	Electronic Capacitors			
2261	Finishing Plants, Cotton			
2273	Carpets and Rugs			

**Table A. 22 Anderson County and Upstate
South Carolina Clusters, 1998-2004 (Cont.)**

<u>SIC</u>	<u>Industry</u>	<u>New Targets</u>	<u>New Other</u>	<u>3-Digit</u>
3599	Industrial Machinery	1		1
2653	Corrugated and Solid Fiber Boxes			
2673	Bags: Plastics, Laminated, and Coated			
3566	Speed Changers, Drives, and Gears			
2392	House Furnishings, NEC			
2752	Commercial Printing, Lithographic			
2759	Commercial Printing, NEC			
2299	Textile Goods, NEC			
3545	Machine Tool Accessories	1		2
2399	Fabricated Textile Products, NEC	<u>1</u>	<u>—</u>	<u>1</u>
	TOTAL	17	18	21

**Table B. General Rankings of Lancaster
County Clusters, 2002-2004**

<u>SIC</u>	<u>Industry</u>	<u>Targets</u>	<u>Others</u>	<u>3-Digit</u>
3714	Motor Vehicle Parts & Accessories			1
3562	Ball & Roller Bearings			
2821	Plastics Materials & Resins			
3672	Printed Circuit Boards			
2796	Platemaking Services			
3842	Surgical Appliances & Supplies			
3443	Fabricated Plate Work (Boiler Shops)			
3321	Gray & Ductile Iron Foundries			
3081	Unsupported Plastics Film & Sheets			1
3554	Paper Industries Machinery			1
2899	Chemical Preparations, NEC			
2392	Household Furnishings, NEC			
3471	Metal Plating & Polishing			

**Table B. General Rankings of Lancaster
County Clusters, 2002-2004, (Cont.)**

<u>SIC</u>	<u>Industry</u>	<u>Targets</u>	<u>Others</u>	<u>3-Digit</u>
3541	Machine Tools, Metal Cutting			
3281	Cut Stone & Stone Products			
3231	Products of Purchased Glass			
2657	Folding Paperboard Boxes			1
3546	Power-Driven Hand Tools			
3993	Signs & Advertising Specialties			
2679	Converted Paper Products, NEC			
2782	Blankbooks & Looseleaf Binders			
3069	Fabricated Rubber Products, NEC			
3496	Miscellaneous Fabricated Wire Products			
	TOTAL	<u>0</u>	<u>7</u>	<u>4</u>