



Pennsylvania defines industry clusters 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. Currently, there are 12 clusters identified, along with several critical sub-clusters. Combined, these 12 industry clusters account for nearly 82 percent of all employment in the Commonwealth.

## Cluster Summary

The Agriculture and Food Production (AFP) cluster begins with the growing of food crops, including grains and livestock, and ends with the wholesale distribution of these products. The cluster also includes support industries, such as refrigerated warehousing and fertilizer manufacturing, as well as public agencies that oversee agricultural programs.

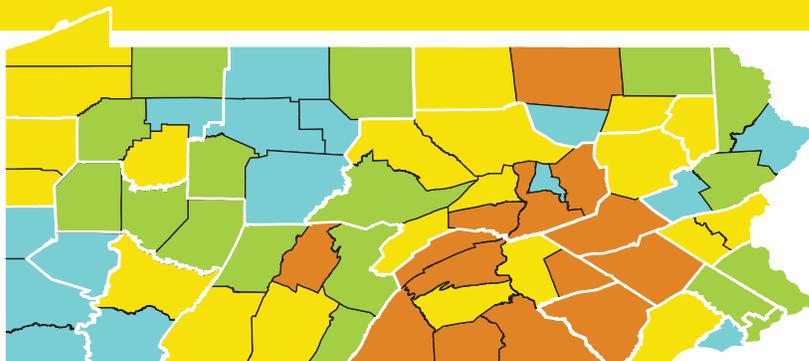
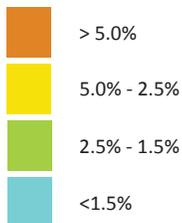
	2009	2014
Employer Units	7,545	7,790
Number of Jobs	163,526	170,139
Percent of Total Pennsylvania Jobs	2.99%	3.01%
Average Annual Wages	\$39,918	\$43,739
Location Quotient	0.83	0.84

Employment in Pennsylvania has increased slightly in this cluster, and it is a reflection of the economy as a whole as the cluster accounts for just under 3% of total employment in the Commonwealth. National employment has mirrored state employment closely as the Location Quotient (LQ) has increased just slightly. Notably, however, is the fact that this traditionally low-paying cluster has seen significant gains in average wages; nearly a 10 percent increase since 2009.



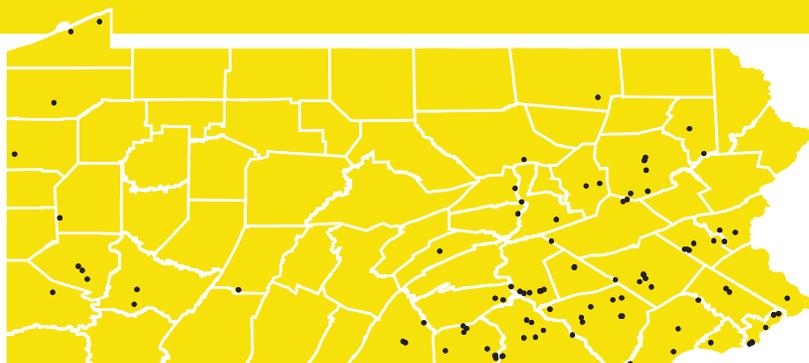
Center for Workforce Information & Analysis  
 651 Boas St.  
 Harrisburg, PA 17121  
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## Percent Employment by County



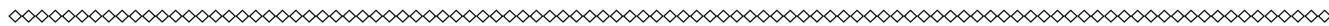
## Major Employers

- Hershey Foods Corporation
- Bimbo Bakeries USA Inc
- Hatfield Quality Meats Inc
- UTZ Quality Foods Inc
- Cargill Meat Solutions Corporation
- JBS Souderton Inc



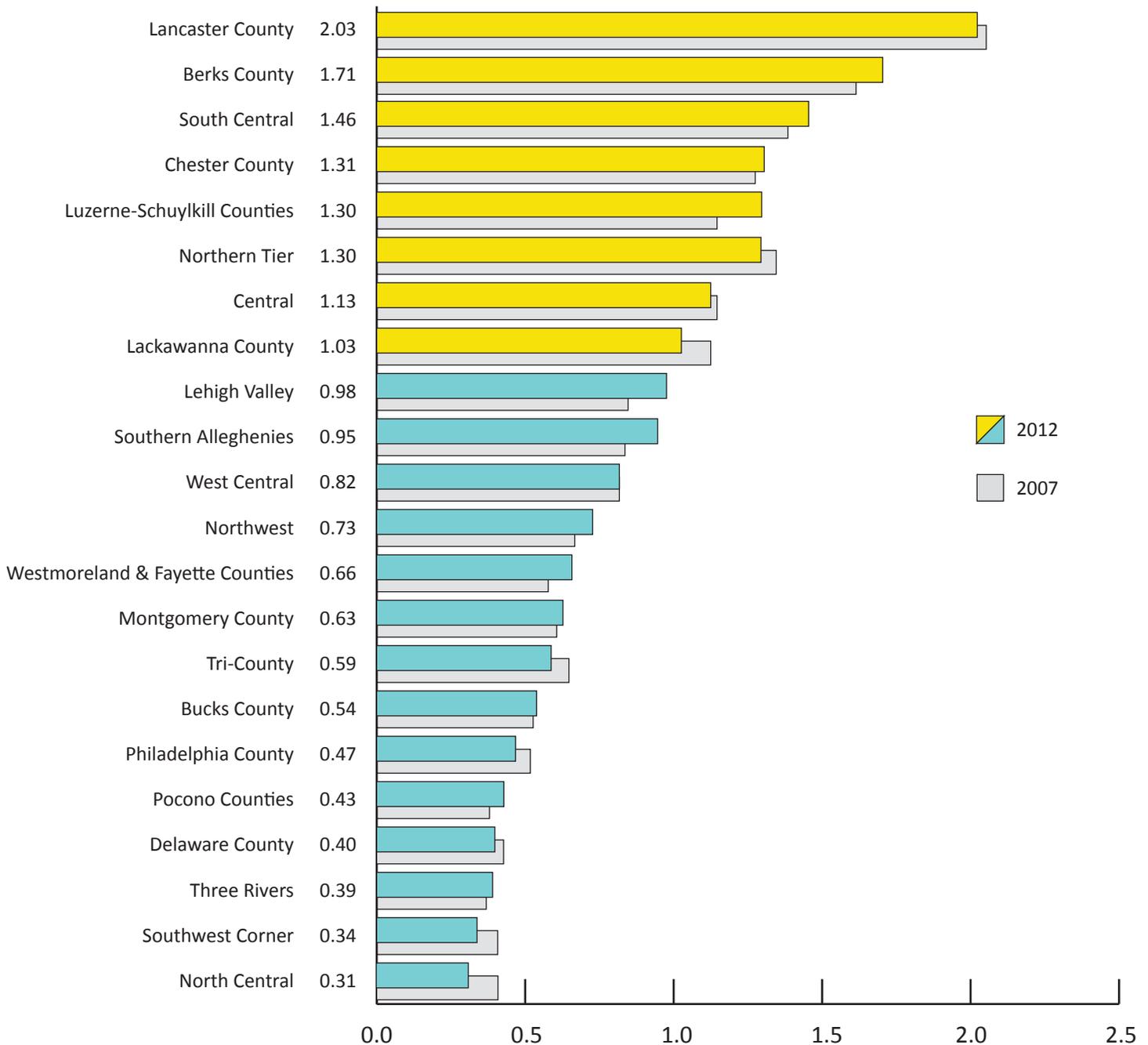
## Top Industries Based on Employment

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| <ul style="list-style-type: none"> <li>• Veterinary Services</li> <li>• General Line Grocery Merchant Wholesalers</li> <li>• Commercial Bakeries</li> <li>• Other Grocery Product Merchant Wholesalers</li> <li>• Mushroom Production</li> <li>• Other Snack Food Manufacturing</li> <li>• Meat Processed from Carcasses</li> <li>• Animal, Except Poultry, Slaughtering</li> <li>• Confectionery Mfg. from Purchased Chocolate</li> <li>• Nursery, Garden &amp; Farm Supply Stores</li> </ul> | <ul style="list-style-type: none"> <li>• Poultry Processing</li> <li>• Fruit &amp; Vegetable Canning</li> <li>• Fruit &amp; Vegetable Merchant Wholesalers</li> <li>• Fluid Milk Manufacturing</li> <li>• Beer &amp; Ale Merchant Wholesalers</li> <li>• Chocolate &amp; Confectionery Mfg. from Cacao Beans</li> <li>• Refrigerated Warehousing &amp; Storage</li> <li>• Dairy Cattle &amp; Milk Production</li> <li>• Soft Drink Manufacturing</li> <li>• Fruit &amp; Vegetable Markets</li> </ul> |
|--|--|



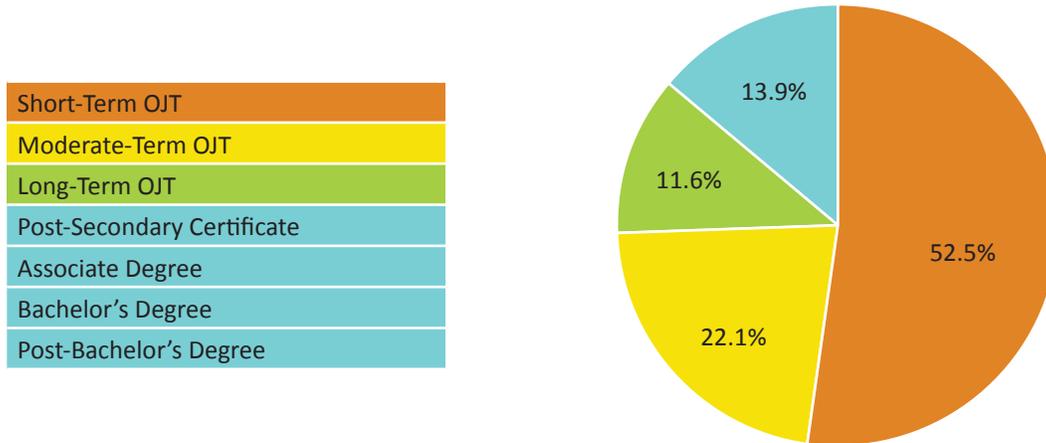
## Employment Concentration

A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. A quotient greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. While the Lancaster Workforce Development Area (WDA) has the highest LQ of any area, it has declined slightly in recent years. Only Berks, South Central, Chester County and Luzerne-Schuylkill Counties WDAs both have LQs greater than one and have also slightly increased their competitiveness since 2009.



## Educational Requirements

This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. Three out of every four AFP jobs require less than one year of on-the-job training to enter employment. The low-skilled occupations that make up this cluster will most likely remain, with technological advancement only requiring slightly more training.



## Occupations with Significant Employment

The following table lists occupations that are typically employed within the AFP cluster. They may not all be identified as High Priority Occupations (HPOs), but are reflective of the cluster's staffing needs. The AFP cluster employs at least 2,500 people in each of these 15 occupations.

SOC Code	Occupation	Cluster Wage 2014	Job Openings	
			Industry Cluster	All Industries
53-7062	Laborers & Freight, Stock & Material Movers	\$30,510	396	4,437
51-9111	Packaging & Filling Machine Operators	\$34,515	174	440
41-4012	Sales Representatives	\$58,867	174	1,949
53-7064	Packers & Packagers, Hand	\$25,654	234	1,220
41-2011	Cashiers	\$19,180	262	6,747
53-3032	Heavy & Tractor-Trailer Truck Drivers	\$43,886	187	2,402
53-3031	Driver/Sales Workers	\$34,044	122	422
41-2031	Retail Salespersons	\$25,036	205	7,036
51-9198	Helpers--Production Workers	\$26,954	116	577
51-3092	Food Batchmakers	\$33,044	158	187
53-7051	Industrial Truck & Tractor Operators	\$36,616	103	556
43-5081	Stock Clerks & Order Fillers	\$29,663	113	2,344
43-9061	Office Clerks, General	\$29,588	65	3,274
51-3011	Bakers	\$26,349	72	268
51-1011	Supervisors - Production & Operating Workers	\$56,750	38	407