



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 83 percent of all employment in the commonwealth.

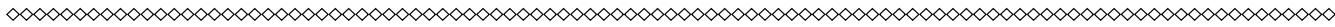
Cluster Summary

The Agriculture & 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.

	2015	2019	2020
Employer Units	7,881	8,359	8,413
Number of Jobs	171,819	181,789	176,406
Percent of Total Pennsylvania Jobs	3.0%	3.1%	3.2%
Average Annual Wages	\$45,030	\$47,980	\$51,013
Location Quotient (LQ)	0.84	0.85	0.86

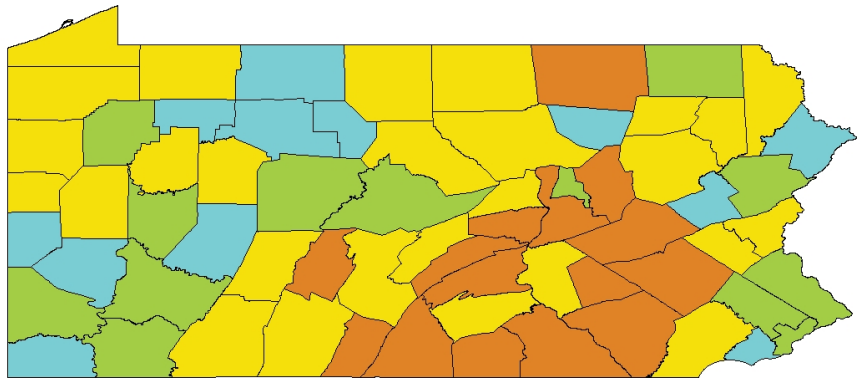
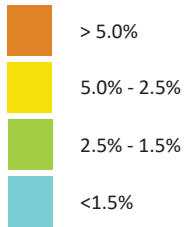
LQs greater than one suggest a competitive advantage.

AFP cluster employment in Pennsylvania has increased slightly and it is a reflection of the economy as a whole. The cluster continued to account for 3 percent of total employment in the commonwealth. National employment has mirrored state employment closely as the Location Quotient (LQ) has increased just slightly. Notably, is the fact that this traditionally low-paying cluster has seen significant gains in average wages; about a 13 percent increase since 2015.



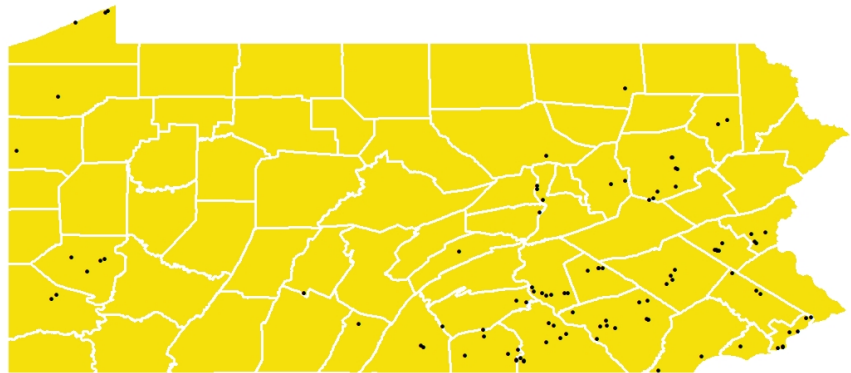
Note: The 2020 employment and wages data, as presented in this publication, reflect the effects of business and school closures implemented to mitigate the spread of Coronavirus (COVID-19).

Percent Employment by County



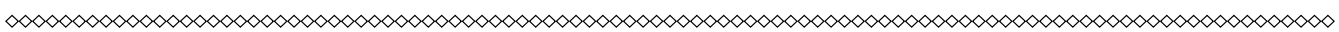
Major Employers

- The Hershey Company
- Cargill Meat Solutions Corporation
- Hatfield Quality Meats Inc
- JBS Souderton Inc
- Farmers Pride Inc
- Bimbo Bakeries USA Inc



Top Industries Based on Employment

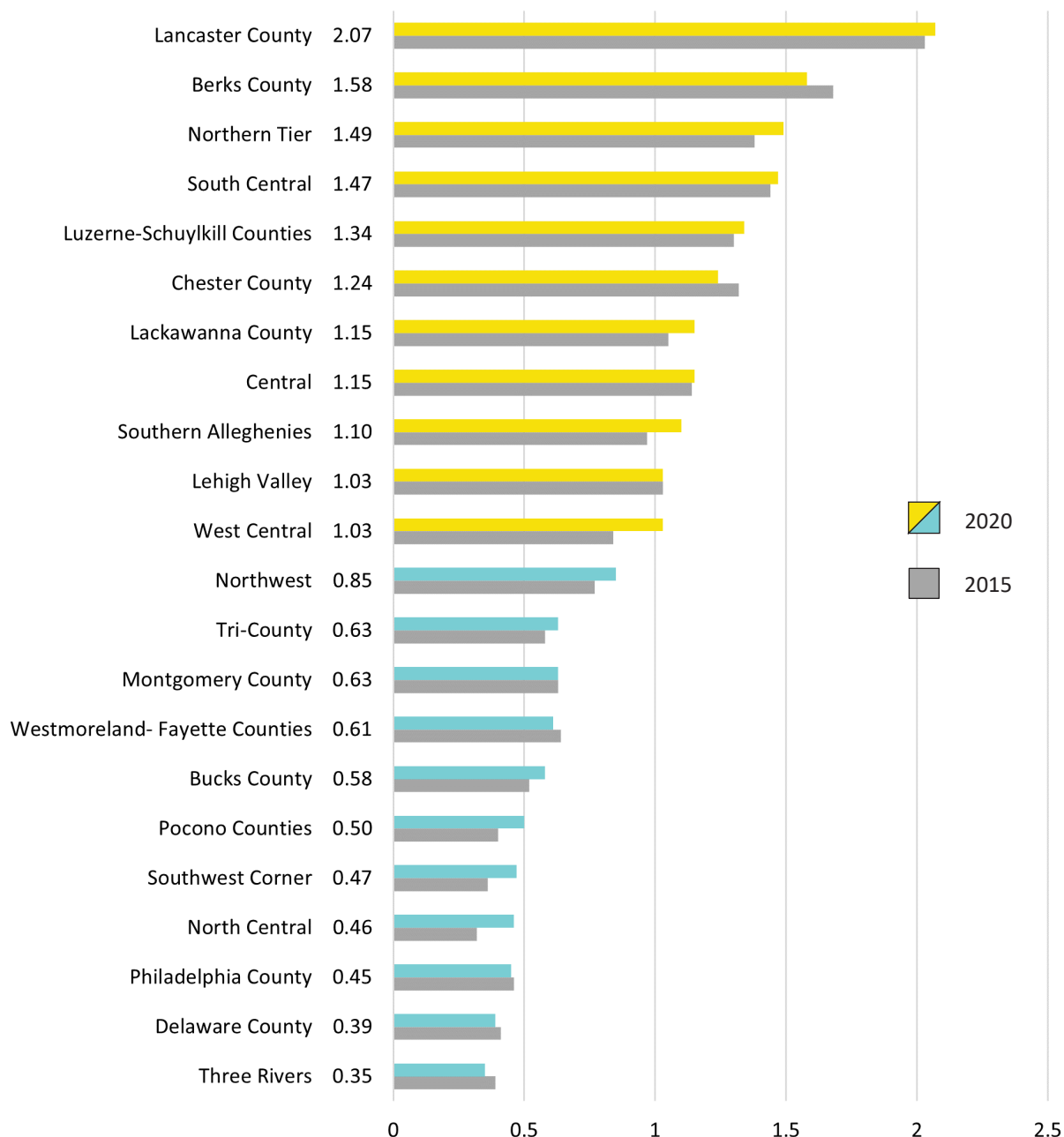
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| <ul style="list-style-type: none"> • Veterinary Services • General Line Grocery Merchant Wholesalers • Meat Processed from Carcasses • Other Grocery Product Merchant Wholesalers • Commercial Bakeries • Other Snack Food Manufacturing • Animal, Except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

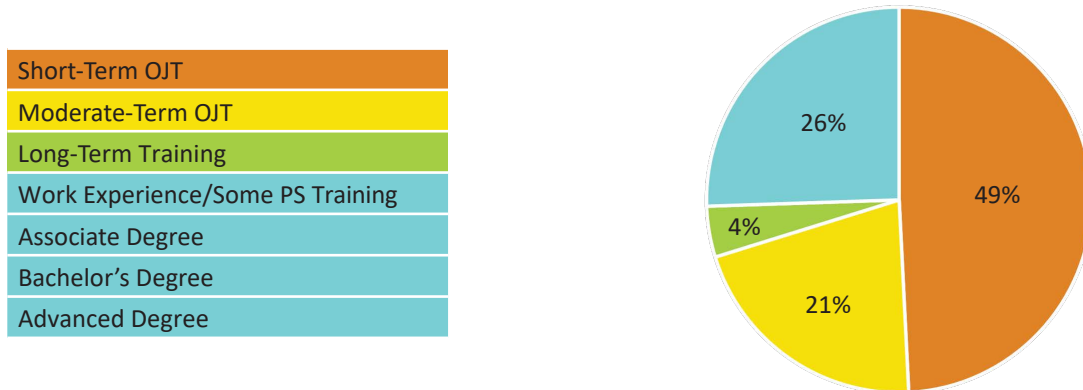
A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. The Lancaster Workforce Development Area (WDA) has the highest LQ of any area and it has increased slightly in recent years. Only Southern Alleghenies and West Central WDAs have LQs greater than one and have also increased their competitiveness by more than 10 percent since 2015.



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Educational Requirements

This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. Seventy percent of AFP jobs require less than one year of on-the-job training to enter employment. The lower-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 employ at least 3,500 people in the AFP cluster.

SOC Code	Occupation	Average Wage	Annual Demand	
			All Industries	Industry Cluster
45-2092	Farmworkers & Laborers: Crop, Nursery & Greenhouse	\$32,550	3,604	3,357
53-7062	Laborers & Freight/Stock/Material Movers	\$33,910	23,346	1,758
11-9013	Farmers, Ranchers & Other Agricultural Managers	\$81,290	3,872	1,440
51-9111	Packaging & Filling Machine Operators	\$36,780	2,529	1,257
45-2093	Farmworkers: Farm, Ranch & Aquacultural Animals	\$29,020	1,285	1,145
53-7064	Packers & Packers	\$28,770	3,805	1,126
51-3092	Food Batchmakers	\$37,430	1,161	1,058
41-2031	Retail Salespersons	\$29,580	24,101	820
53-3032	Heavy & Tractor- Trailer Truck Drivers	\$49,850	10,865	750
41-4012	Sales Representatives	\$75,360	6,857	655
43-5081	Stock Clerks & Order Fillers	\$29,140	11,699	541
53-3033	Light Truck Drivers	\$38,330	4,731	471
53-7051	Industrial Truck & Tractor Operators	\$39,640	3,846	451
43-9061	Office Clerks, General	\$38,360	19,111	409
51-3031	Driver/Sales Workers	\$31,340	1,879	398

*The 2020 average annual wage reflects wages across all industries and is not specific to the cluster.

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