



*Economic Development Strategic Plan
Hagerstown-Washington County, Maryland*

Competitive Economic Scorecard



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*Prepared for the
Hagerstown-Washington County Economic Development Commission
Economic Development Strategic Planning Task Force
Hagerstown-Washington County Industrial Foundation
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Counties Profiled

Washington County is profiled and compared with 12 other counties based on a number of demographic and economic indicators in this Scorecard. Counties selected for this analysis are:

Maryland Counties

Washington County (Hagerstown)
Frederick County (Frederick)

Other I-81 Corridor Counties

Berkeley County, West Virginia (Martinsburg)
Frederick County, Virginia (Winchester)*
Franklin County, Pennsylvania (Chambersburg)
Cumberland County, Pennsylvania (Carlisle)

*Winchester, an Independent City, is included with Frederick County.

Other Counties

Spotsylvania County, Virginia*
Buncombe County, North Carolina (Asheville)
Catawba County, North Carolina (Hickory)
Florence County, South Carolina (Florence)
Spartanburg County, South Carolina (Spartanburg)
Washington County, Tennessee (Johnson City)
Warren County, Kentucky (Bowling Green)

*Fredericksburg, an Independent City, is included with Spotsylvania County

The 12 competitive and peer counties were selected on the basis of these considerations:

- Counties adjacent to Washington County -- Frederick, Maryland; Berkeley, West Virginia; and Franklin, Pennsylvania.
- Other nearby counties in the I-81 corridor -- Frederick, Virginia, and Cumberland, Pennsylvania.
- Other counties and center cities that are of comparable size, are served by Interstate highways (including two intersecting Interstate highways in a several cases), are located similar distances from large urban areas, and/or are otherwise representative of areas having other characteristics similar to those of Washington County.

Similarities include the Civil War, which touched all or most counties, one of which, Spotsylvania County, VA, is branded “Crossroads of the Civil War.” Like Hagerstown, the City of Spartanburg, SC, is also known as the “Hub City.”

This Scorecard presents comparative analyses of these counties based on various demographic and economic indicators. Purposes of this Scorecard are to:

1. Identify competitive economic strengths and weaknesses in Washington County in relation to adjacent and nearby counties and others that have similar characteristics.
2. Identify where improvements are needed in Washington County and potential economic growth opportunities for the County.

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Table 1. Size and Location Characteristics of Scorecard Counties

County	2010 County Population	Principal City	2010 City Population	Metro Area and 2010 Population	Interstate Highways	Distance to Major Urban Areas (miles)
Maryland Counties						
Washington	147,430	Hagerstown	39,662	Hagerstown-Martinsburg, MD/WV - 269,140	I-70, I-81	Baltimore – 70, Washington DC - 65
Frederick	233,385	Frederick	65,239	Washington-Arlington-Alexandria, DC/MD/VA/WV - 5,582,170	I-70, I-270	Baltimore - 45 Washington DC - 40
Adjacent and Nearby I-81 Corridor Counties						
Berkeley, WV	104,169	Martinsburg	17,227	Hagerstown-Martinsburg - 269,140	I-81	Baltimore – 90, Wash DC - 85
Frederick, VA	104,508 (1)	Winchester	26,203	Winchester, VA/WV - 128,472	I-81	Washington DC - 60
Franklin, PA	149,618	Chambersburg	20,268	Not in an MSA	I-81	Baltimore – 95, Wash DC - 90
Cumberland, PA	235,406	Carlisle	19,262	Harrisburg-Carlisle, PA - 549,475	I-76, I-81, I-83	Baltimore – 75, Philadel - 110
Other Counties						
Spotsylvania, VA	146,683	Fredericksburg	24,286	Washington-Arlington-Alexandria	I-95	Washington DC - 50
Buncombe, NC	238,318	Asheville	83,373	Asheville, NC - 424,858	I-26, I-40	Charlotte - 110
Catawba, NC	154,358	Hickory	40,010	Hickory-Lenoir, NC - 365,497	I-40	Charlotte - 50 Greensboro/Winston Salem - 75
Florence, SC	136,885	Florence	37,056	Florence, SC - 205,566	I-20, I-95	Charlotte - 100
Spartanburg, SC	284,307	Spartanburg	43,479	Spartanburg, SC - 284,307 (2)	I-26, I-85	Charlotte - 80
Washington, TN	122,979	Johnson City	63,152	Johnson City, TN - 198,716 (3)	I-26, I-81	None within 150 miles
Warren, KY	113,792	Bowling Green	58,067	Bowling Green, KY - 125,953	I-65	Nashville - 65

- (1) Includes population of Independent City of Winchester.
- (2) Part of Greenville-Spartanburg Consolidated Statistical Area.
- (3) Part of Tri-Cities (Bristol, Kingsport, Johnson City) Consolidated Statistical Area.

Source: US Census Bureau

Table 2. Population Growth Trends and Income Characteristics

County	Population		2000-2010 Annual Growth Rate		2010 Income (\$)		2010 County Poverty Rate (%)
	2000	2010	No/Yr	Percent/Yr	HH Median	Per Capita	
<i>Maryland Counties</i>							
Washington	131,923	147,430	1,551	1.12	52,994	26,588	11.4
Frederick	195,277	233,385	3,811	1.80	81,686	35,172	5.6
<i>Adjacent and Nearby I-81 Corridor Counties</i>							
Berkeley, WV	75,905	104,169	2,826	3.22	52,857	25,460	19.1
Frederick, VA -- Winchester	82,794 (1)	104,508 (1)	2,171	2.36	61,973 44,873	27,977 26,341	10.0
Franklin, PA	129,313	149,618	2,031	1.47	51,035	25,307	9.5
Cumberland, PA	213,674	235,406	2,173	0.97	60,219	30,119	7.4
<i>Other Counties</i>							
Spotsylvania, VA -- Fredericksburg	109,674	146,683	3,710	2.95	76,574 43,558	31,012 27,870	9.7
Buncombe, NC	206,330	238,318	3,199	1.45	44,190	25,665	17.1
Catawba, NC	141,885	154,358	1,247	0.85	43,484	22,969	14.5
Florence, SC	125,761	136,885	1,112	0.85	40,487	21,932	21.7
Spartanburg, SC	253,791	284,307	3,052	1.14	42,680	21,924	17.2
Washington, TN	107,198	122,979	1,578	1.38	41,256	24,114	17.8
Warren, KY	92,522	113,792	2,127	2.09	43,954	23,206	20.5

(1) Includes Independent City of Winchester.

Source: UC Census Bureau

Comment: The Washington County population has been growing at a slower rate than most of its regional competitors and other peers. Median household and per capita incomes are generally on par with its regional competitors, except Frederick County, MD, and are higher than other peer counties included in this analysis. The Washington County poverty rate is higher than its regional peers, except Berkeley County, largely due to the high incidence of poverty in the City of Hagerstown, but is lower than most of the other counties included in this analysis.

Table 3. Housing Growth Trends

County	Number of New Housing Units Permitted										Annual Averages		
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2002-07	2008-11	2002-11
<i>Maryland Counties</i>													
Washington	1,235	1,105	1,368	1,945	908	427	317	165	256	168	1,165	227	789
Frederick	1,578	1,837	1,773	1,872	1,300	1,288	619	839	939	644	1,608	760	1,269
<i>Adjacent and Nearby I-81 Corridor Counties</i>													
Berkeley, WV	1,441	1,530	1,811	1,935	1,659	1,258	775	485	400	324	1,606	496	1,162
Frederick, VA (1)	1,187	966	1,229	1,490	1,090	616	349	308	284	414	1,096	339	793
Franklin, PA	968	992	1,199	1,082	869	1,084	761	508	570	227	1,032	517	826
Cumberland, PA	1,271	1,378	1,266	1,348	1,099	1,446	1,208	836	832	652	1,301	890	1,137
<i>Other Counties</i>													
Spotsylvania, VA (1)	1,754	1,862	1,589	2,075	1,544	689	219	503	600	660	1,586	496	1,150
Buncombe, NC	2,158	1,737	2,073	2,549	2,249	1,888	1,675	909	1,588	545	2,109	1,179	1,737
Catawba, NC	1,561	1,006	852	841	740	736	359	202	156	129	956	212	658
Florence, SC	507	47	182	725	730	944	505	297	308	314	523	356	456
Spartanburg, SC	1,986	2,081	2,219	2,131	2,156	1,646	1,077	634	562	532	2,037	701	1,502
Washington, TN	711	850	773	970	1,247	761	909	398	598	317	885	556	753
Warren, KY	739	1,046	1,324	1,385	921	827	559	353	573	843	1,040	582	857

(1) Frederick County includes the Independent City of Winchester; Spotsylvania County includes the Independent City of Fredericksburg.

Source: US Census Bureau

Comment: The Washington County housing market benefited in the first half of the past decade from spillover growth from the DC metro area, peaking at nearly 2,000 housing units permitted in 2005, but has been slowest of the 13 counties profiled to recover from national economic slump beginning in 2008. Average annual new units permitted in the County in the past four years (2008-2011) dropped by 81 percent from the average in the preceding six years (2002-2007), while the average decline for all 13 counties was only 57 percent. By comparison, Cumberland County, PA, was down only 32 percent, and Frederick County, MD, was down 53 percent. Neighboring Berkeley County, WV, and Franklin County, PA, also fared better than Washington County.

Table 4. Labor Force Growth Trends and Unemployment

County	Labor Force		2000-10 Annual Growth Rate		LF Participation Rate (1)		August 2012 Unemployment Rate (%)	2010 Ratio of Jobs to Labor Force
	2000	2010	No/Year	Percent/Yr	2000	2010		
<i>Maryland Counties</i>								
Washington	63,714	69,602	589	0.89	48.3	47.2	8.6	0.91
Frederick	107,151	126,597	1,945	1.68	54.9	54.2	5.8	0.72
<i>Adjacent and Nearby I-81 Corridor Counties</i>								
Berkeley, WV	38,040	46,037	800	1.93	50.1	44.2	6.9	0.63
Frederick, VA (2)	44,564	57,472	1,291	2.58	53.8	55.0	5.7	0.84
Franklin, PA	65,289	80,811	1,552	2.16	50.5	54.0	6.8	0.72
Cumberland, PA	111,105	122,750	1,165	1.00	52.0	52.1	7.1	0.99
<i>Other Counties</i>								
Spotsylvania, VA	58,059	80,809	2,275	3.36	52.9	55.1	5.3	0.68
Buncombe, NC	105,055	124,568	1,951	1.72	50.9	52.3	7.6	0.89
Catawba, NC	77,857	75,117	(274)	(0.36)	54.8	54.9	11.1	1.04
Florence, SC	60,496	63,236	274	0.44	48.1	46.2	9.5	0.94
Spartanburg, SC	126,914	133,414	650	0.50	50.0	46.9	9.4	0.82
Washington, TN	54,427	64,847	1,042	1.77	50.8	52.7	7.2	0.92
Warren, KY	49,759	58,905	915	1.70	53.8	51.8	7.4	0.96

Note: (000) indicates a loss.

(1) Labor force as a percent of the population.

(2) Frederick County data includes the Independent City of Winchester.

Source: US Census Bureau

Comment: The Washington labor force has been growing at a slower rate than most of its regional competitors and other peers and its labor force participation rate is among the lowest. A positive is that the ratio of local jobs to the size of the labor force is among the highest, indicating that the County is less of a “bedroom community” and is more self-sufficient economically than many others.

Table 5. Educational Attainment and Facilities

County	Educational Attainment (1)				Specialized and Higher Education Facilities
	HS Grad & Higher (%)	Bachelor's Deg & Higher (%)	Bachelor's Deg (%)	Advanced Deg (%) (2)	
<i>Maryland Counties</i>					
Washington	83.5	18.5	12.0	6.6	WCPS - Technical High School WCPS - Barbara Ingram School for the Arts Hagerstown Community College University System of Maryland, Hagerstown Kaplan University (private)
Frederick	91.8	37.2	22.5	14.7	Delaplane Visual Arts Education Center Frederick Community College Hood College (4-year) Mount St. Mary's College (4-year) Kaplan University (private)
<i>Adjacent and Nearby I-81 Corridor Counties</i>					
Berkeley, WV	84.9	19.6	12.7	6.9	Blue Ridge Community & Technical College James Rumsey Technical Institute Valley College of Technology Shepherd University WVU Robert C. Byrd Health Sciences Center
Frederick, VA	84.4	26.3	15.8	10.5	Lord Fairfax Community College -- 7,000+ enrollment Shenandoah University -- 3,500+ enrollment
Franklin, PA	84.4	19.1	12.1	7.0	Franklin County Career & Technology Center Harrisburg Area Community College (branch) Mercersburg Academy Shippensburg University (4-year)

(1) Percent of population 25 years of age and older

(2) Graduate or professional degree

Source: US Census Bureau, American Community Survey

Table 5. Educational Attainment and Facilities (continued)

County	Educational Attainment (1)				Specialized and Higher Education Facilities
	HS Grad & Higher (%)	Bachelor's Deg & Higher (%)	Bachelor's Deg (%)	Advanced Deg (%) (2)	
<i>Adjacent and Nearby I-81 Corridor Counties (continued)</i>					
Franklin, PA	84.4	19.1	12.1	7.0	Shippensburg University (nearby in Cumberland Co)
Cumberland, PA	91.3	32.3	20.1	12.2	Harrisburg Area Community College (nearby) Shippensburg University
<i>Other Counties</i>					
Spotsylvania, VA	88.5	30.4	17.5	12.9	Germanna Community College Spotsylvania Career and Technical Center Strayer University Mary Washington University
Buncombe, NC	89.2	32.6	21.3	11.3	Asheville-Buncombe Technical Community College University of North Carolina at Asheville
Catawba, NC	82.2	20.5	14.1	6.4	Catawba Valley Community College Manufacturing Solutions Center at CVCC NC Center for Engineering Technologies Appalachian State University Center at Hickory Lenoir-Rhyne University
Florence, SC	81.8	20.4	12.9	7.5	Florence Darlington Technical College Southeastern Institute of Manufacturing Technologies Francis Marion University

(1) Percent of population 25 years of age and older

(2) Graduate or professional degree

Source: US Census Bureau, American Community Survey

Table 5. Educational Attainment and Facilities (continued)

County	Educational Attainment (1)				Specialized and Higher Education Facilities
	HS Grad & Higher (%)	Bachelor's Deg & Higher (%)	Bachelor's Deg (%)	Advanced Deg (%) (2)	
<i>Other Counties (continued)</i>					
Spartanburg, SC	81.1	20.5	14.0	6.6	Spartanburg Community College University of South Carolina, Spartanburg Regional Campus Wofford College Converse College Spartanburg Methodist College
Washington, TN	85.9	28.9	18.0	10.9	Northeast State Community College Milligan College Tusculum College East Tennessee State University -- 16,000+ enrollment
Warren, KY	85.3	28.8	18.3	10.5	Warren Area Technology Center (ATC) Bowling Green Technical College (several campuses) Western Kentucky University -- 20,000+ enrollment

(1) Percent of population 25 years of age and older

(2) Graduate or professional degree

Source: US Census Bureau, American Community Survey

Comment: Washington County is at the lower end of the educational attainment spectrum in terms of percentages of its residents 25 years of age and older having four-year college degrees and graduate and professional degrees. This may be explained by the County's "blue collar" roots and also by the growing lower income populations attracted to the Hagerstown area by a concentration of social service agencies and organizations and correctional facilities. Whatever the reason, statistics that show competitively low educational attainment levels pose a daunting challenge to both educators and economic developers that seek to raise educational achievement levels and promote Washington County as a viable place to live for an educated workforce and a location for high-wage jobs.

Table 6. Occupational Mix (Percent Distribution)

County	Management, Business, and Financial	Professional and Technical	Service Occupations	Sales and Office Occupations	Farming, Forestry, and Fisheries	Construction, Extraction, and Maintenance	Production, Transportation and Materials Movement
<i>Maryland Counties</i>							
Washington	11.9	15.9	15.2	27.8	0.4	11.8	17.0
Frederick	17.6	24.1	12.6	25.6	0.4	10.8	9.0
<i>Adjacent and Nearby I-81 Corridor Counties</i>							
Berkeley, WV	9.3	17.0	13.7	25.0	0.3	12.8	21.9
Frederick, VA	13.8	16.6	11.6	26.0	0.3	13.4	18.2
Franklin, PA	11.3	16.5	15.3	24.1	1.0	10.3	21.5
Cumberland, PA	14.0	20.9	13.1	29.6	0.5	7.4	14.4
<i>Other Counties</i>							
Spotsylvania, VA	14.9	20.6	13.7	27.2	0.2	11.7	11.8
Buncombe, NC	11.6	20.7	15.1	25.7	0.3	10.0	16.7
Catawba, NC	10.6	13.8	10.6	24.3	0.4	8.9	31.5
Florence, SC	12.0	20.9	13.7	25.5	0.6	10.3	17.1
Spartanburg, SC	12.4	22.9	14.7	24.5	0.2	6.8	18.5
Washington, TN	11.6	20.1	14.8	27.5	0.3	9.1	16.6
Warren, KY	11.9	19.3	14.4	28.2	0.7	7.9	17.7

Source: www.BestPlaces.net

Comment: Washington County has comparatively high percentages of its working labor force in the service, sales/office, construction/maintenance, and production/transportation/materials movement occupations, but is at the lower end in the generally higher wage white collar management/business/financial and professional/technical occupations.

Table 7. Employment and Business Growth Trends, 2001-2011

County	Total Employment (1)		2001-2011 Growth Rate		Number of Establishments		2001-2011 Growth Rate	
	2001	2011	No/Year	Percent	2001	2011	No/Year	Percent
<i>Maryland Counties</i>								
Washington	63,194	64,674	148	0.23	3,141	3,500	36	1.09
Frederick	79,434	90,905	1,107	1.31	4,918	6,077	116	2.14
<i>Adjacent and Nearby I-81 Corridor Counties</i>								
Berkeley, WV	26,447	28,958	251	0.91	1,554	1,869	32	1.86
Frederick, VA	46,485	49,872	339	0.71	2,481	3,123	64	2.33
Franklin, PA	47,899	54,999	710	1.39	2,880	3,317	44	1.42
Cumberland, PA	122,699	122,111	(54)	(0.04)	5,415	6,015	60	1.06
<i>Other Counties</i>								
Spotsylvania, VA	46,777	55,029	825	1.64	3,110	4,132	102	2.88
Buncombe, NC	105,378	111,113	574	0.53	6,580	7,848	127	1.78
Catawba, NC	97,173	78,213	(1,896)	(2.15)	4,423	4,367	(6)	(0.13)
Florence, SC	62,927	59,034	(389)	(0.64)	3,466	3,055	(41)	(1.25)
Spartanburg, SC	117,262	111,288	(597)	(0.52)	6,498	5,777	(72)	(1.17)
Washington, TN	56,611	59,833	322	0.56	2,389	2,637	25	0.99
Warren, KY	48,537	56,317	778	1.50	2,770	3,128	36	1.22

(1) Covered jobs are those reported by employers for unemployment insurance purposes or otherwise subject to monitoring by state and federal governments. Military personnel, railroad workers, many self employed individuals, and others are not included.

Source: US Bureau of Labor Statistics; US Census Bureau, County Business Patterns

Comment: Washington County experienced sluggish job and business growth from 2001 to 2011, compared to other counties in the immediate region and the majority of counties studied. Four counties, however, experienced negative job growth during the period. Job growth rates were strongest in two neighboring counties -- Frederick, MD, and Franklin, PA -- plus Spotsylvania, VA, an outer county in the Washington DC metro area, and Warren County, KY (Bowling Green area). Frederick County, MD, Frederick and Spotsylvania Counties, VA, and Buncombe County, NC (Asheville area) had the highest growth rates in new establishments.

Table 8. Ratios of Jobs to Population, 2010 (1)

County	Total Jobs (2)	Federal Government	State Government	Total Private Sector Jobs	Construction	Manufacturing	Wholesale Trade
<i>Maryland Counties</i>							
Washington	431.0	5.2	17.7	376.9	17.2	43.6	15.7
Frederick	389.4	17.3	2.9	324.8	31.1	20.2	9.8
<i>Adjacent and Nearby I-81 Corridor Counties</i>							
Berkeley, WV	271.0	36.1	6.8	189.6	8.8	13.1	8.5
Frederick, VA	463.3	14.9	7.0	395.0	21.1	65.9	13.1
Franklin, PA	364.6	17.0	6.5	306.2	12.8	52.7	9.5
Cumberland, PA	509.7	21.6	14.0	441.3	18.0	33.8	17.0
<i>Other Counties</i>							
Spotsylvania, VA	375.2	2.6	13.5	311.2	17.0	ND	ND
Buncombe, NC	462.4	14.6	17.8	393.6	20.3	44.3	14.0
Catawba, NC	499.4	4.0	8.8	435.6	16.3	137.9	23.9
Florence, SC	431.8	6.0	20.2	336.7	12.5	42.3	16.1
Spartanburg, SC	386.2	2.0	11.9	319.8	15.8	81.3	20.6
Washington, TN	472.5	20.0	32.4	379.7	12.2	43.8	13.7
Warren, KY	482.9	3.8	35.6	403.2	21.0	66.7	19.4

(1) Number of local “covered” jobs per 1,000 population. Covered jobs are those reported by employers for unemployment insurance purposes or otherwise subject to monitoring by state and federal governments. Military personnel, railroad workers, many self employed individuals, and others are not included.

ND Not disclosed for either or both Spotsylvania County and the City of Fredericksburg.

Source: US Bureau of Labor Statistics; US Census Bureau, 2010 County Business Patterns

Comment: See comments on second page of Table 8.

Table 8. Ratios of Jobs to Population, 2010 (continued) (1)

County	Retail Trade	Transportation & Warehousing	Information	Finance & Insurance	Professional & Technical Services	Health & Social Services	Arts, Entertainment & Recreation	Accommodations & Food Services
Maryland Counties								
Washington	72.0	31.6	8.8	34.0	12.5	65.7	4.7	33.4
Frederick	48.9	5.5	6.5	30.6	43.4	42.1	5.5	33.8
Adjacent and Nearby I-81 Corridor Counties								
Berkeley, WV	35.7	6.3	12.8	6.1	11.8	34.8	2.7	24.9
Frederick, VA	70.3	15.8	5.1	12.4	14.2	72.7	4.4	39.9
Franklin, PA	45.4	31.4	4.3	8.1	12.6	51.3	5.7	27.1
Cumberland, PA	65.3	51.0	10.6	35.8	29.0	65.2	4.5	38.4
Other Counties								
Spotsylvania, VA	71.3	ND	5.8	7.6	17.7	65.5	5.5	48.3
Buncombe, NC	61.5	15.9	5.5	11.3	18.0	91.4	8.8	57.6
Catawba, NC	59.8	23.4	3.7	8.2	10.0	61.9	5.3	40.0
Florence, SC	59.1	12.5	6.6	22.2	17.3	63.2	4.1	41.7
Spartanburg, SC	45.6	14.2	2.8	12.8	11.0	29.9	3.3	35.6
Washington, TN	59.4	2.3	14.1	23.8	10.4	80.5	3.5	45.6
Warren, KY	61.1	Not Disclosed	5.8	13.2	13.8	66.7	6.0	50.0

(1) Number of local “covered” jobs per 1,000 population. Covered jobs are those reported by employers for unemployment insurance purposes or otherwise subject to monitoring by state and federal governments. Military personnel, railroad workers, many self employed individuals, and others are not included.

ND Not disclosed for either or both Spotsylvania County and the City of Fredericksburg.

Source: US Bureau of Labor Statistics; US Census Bureau, 2010 County Business Patterns

Comment: Washington County has higher ratios of total jobs and total private sector jobs per 1,000 population than its neighbors, Frederick Co, MD, Berkeley Co, WV, and Franklin Co, PA. Comparatively high jobs-to-population ratios are in state government, manufacturing, wholesale trade, retail trade, transportation and warehousing, finance and insurance, and health and social services. Comparatively weaker sectors are federal government, construction, information, professional and technical services, and accommodations and food services.

Table 9. Average Annual Wages (\$), 2010 (1)

County	All Jobs (1)	Federal Government	State Government	All Private Sector Jobs	Construction	Manufacturing	Wholesale Trade
<i>Maryland Counties</i>							
Washington	36,466	44,856	41,587	35,478	42,902	54,145	45,361
Frederick	46,161	78,174	39,537	44,562	49,307	59,922	52,729
<i>Adjacent and Nearby I-81 Corridor Counties</i>							
Berkeley, WV	38,646	78,725	31,885	31,891	39,432	43,769	45,443
Frederick, VA	40,047	87,248	34,431	38,844	40,519	50,458	46,104
Franklin, PA	36,453	61,106	45,404	34,818	37,341	48,220	34,705
Cumberland, PA	42,726	68,112	57,925	41,156	50,145	48,525	52,462
<i>Other Counties</i>							
Spotsylvania, VA	36,213	57,622	41,713	35,555	41,262	County - 49,440	City - 49,440
Buncombe, NC	36,140	72,332	38,324	34,528	37,076	47,415	43,821
Catawba, NC	35,360	51,740	33,384	34,788	37,534	38,340	45,398
Florence, SC	34,156	52,229	37,954	33,060	33,417	49,804	41,835
Spartanburg, SC	39,987	48,913	35,637	39,399	38,894	54,720	48,625
Washington, TN	35,052	63,477	33,141	34,063	35,663	44,095	54,268
Warren, KY	36,010	61,349	39,810	35,104	40,452	48,441	42,741

(1) Covered jobs are those reported by employers for unemployment insurance purposes or otherwise subject to monitoring by state and federal governments. Military personnel, railroad workers, many self employed individuals, and others are not included.

Source: US Bureau of Labor Statistics; US Census Bureau, 2010 County Business Patterns

Comment: See comments on second page of Table 9.

Table 9. Average Annual Wages, 2010 (continued) (1)

County	Retail Trade	Transportation & Warehousing	Information	Finance & Insurance	Professional & Technical Services	Health & Social Services	Arts, Entertainment & Recreation	Accommodations & Food Services
Maryland Counties								
Washington	24,341	35,767	41,426	44,061	51,037	41,067	12,584	14,309
Frederick	26,991	40,955	60,636	54,562	80,580	42,662	18,311	16,249
Adjacent and Nearby I-81 Corridor Counties								
Berkeley, WV	22,236	30,460	41,241	44,216	51,482	36,842	18,074	13,537
Frederick, VA (2)	25,448	42,573	43,622	46,751	51,811	52,953	18,413	14,827
Franklin, PA	22,098	39,066	48,896	46,496	49,245	41,022	13,090	12,780
Cumberland, PA	24,353	47,148	57,016	62,530	63,385	42,002	13,700	14,338
Other Counties								
Spotsylvania, VA	25,205	County - 41,455	47,407	50,866	62,370	48,633	14,313	15,164
Buncombe, NC	23,148	39,659	45,465	56,313	47,101	48,027	24,667	15,942
Catawba, NC	23,406	39,546	40,435	47,538	48,146	43,908	18,096	13,530
Florence, SC	22,850	35,789	38,117	39,289	49,526	38,610	14,261	13,420
Spartanburg, SC	23,557	37,034	44,769	52,543	54,142	40,667	17,199	16,805
Washington, TN	23,290	37,830	44,459	36,237	49,692	47,243	24,722	13,562
Warren, KY	22,721	Not Disclosed	41,348	59,655	41,455	38,947	15,307	12,924

(1) Covered jobs are those reported by employers for unemployment insurance purposes or otherwise subject to monitoring by state and federal governments. Military personnel, railroad workers, many self employed individuals, and others are not included.

(2) Frederick County data includes the Independent City of Winchester.

Source: US Bureau of Labor Statistics; US Census Bureau, [2010 County Business Patterns](#)

Comment: Washington County wages in most sectors generally are competitive with those in all but Frederick County, MD, with its concentrations of high-salaried Federal workers, government contractors, and other professionals and technicians who work locally and in the Washington DC area. Cumberland County, PA, also benefits from its proximity to Harrisburg, the State Capitol, and presence of Federal military facilities in the County. The weakest sector in Washington County is Arts, Entertainment, and Recreation, where local average wages are lowest of all 13 counties.

Table 10. Major Employers

County	Manufacturing	Distribution	Business and Financial Services
Maryland Counties			
Washington	Volvo Powertrain -- 1,500 (automotive equip) Lehigh Phoenix -- 417 (printing/publishing) Sierra Nevada -- 400 (aircraft modification) JLG Industries -- 350 (industrial equip) Certain Teed Corp -- 243 (bldg products) Rust-Oleum Corp -- 202 (paints/coatings)	Federal Express -- 1,004 (package delivery) Staples -- 567 (office products) DOT Foods -- 312 (food products) UPS -- 274 (package delivery) Tractor Supply Co -- 250 (farm equipment)	CitiCorp -- 2,500 First Data Corp -- 2,100 Merkle Response Services -- 520 Susquehanna Bank -- 324
Frederick	Lonza Biosciences -- 524 NVR Building Products -- 450 RR Donelley -- 387 Stulz Air Technology Systems -- 360 Medimmune -- 246	Costco Wholesale -- 500	Wells Fargo Home Mortgage -- 1,881 United Health Care -- 832 State Farm Insurance -- 793
Adjacent and Nearby I-81 Corridor Counties			
Berkeley, WV	Quad Graphics -- 1,020 Plygem -- 140	Macy's Distribution Center -- proposed Federal Express -- 360 Orgill, Inc -- 335 (hardware distributor)	
Frederick, VA	Rubbermail Commercial Products -- 1,000+ American Woodmark Corp -- 500-999 Trex Company -- 500-999 Thermo Fisher Scientific -- 250-499 HP Hood, LLC -- 250-499 (dairy products) Kraft Foods -- 250-499	Kohl's Stores Home Depot	Navy Federal Credit Union -- 250-499 Axiom Staffing Group
Franklin, PA	Manitowoc Crane Group -- 2,000 JLG Industries, Inc -- 1,000 Volvo Construction Equipment -- 850 Johnson Controls/Frick Co -- 550 Martin's Famous Pastry Shoppe, Inc -- 480	Target Distribution Center -- 600 Food Lion Distribution Center -- 600 World Kitchen, LLC -- 480 Ingram Book Company -- 350 National Book Network -- 325	
Cumberland, PA	Fry Communications -- 1,257 (printing) Lear Corp -- 829 Ingersall Rand -- 650 JLG Industries, Inc -- 500 PPG Industries -- 500	Giant Food Stores (HQ) -- 2,600 Exel -- 2,080 (supply chain logistics) Roadway Express -- 1,300 Book Span -- 1,270 (media products) ABF Freight Systems -- 825 Overnight Transportation -- 790	Highmark/PA Blue Shield -- 4,321 JFC Staffing -- 1,101 Sprint Communications -- 680 Capital Blue Cross -- 583

Source: Local and state economic development organizations

Table 10. Major Employers (continued)

County	Education and Health Care	Federal and State Government	Diversified and Other
Maryland Counties			
Washington	Meritus Health -- 2,860 Hagerstown Community College -- Brooks Lane Health Services -- 348	MD Dept of Corrections -- 1,600± MD Dept of Social Services -- 300±	Bowman Group -- 753 (trucking, real estate development, hospitality) Potomac Edison -- power company HQ
Frederick	Frederick Memorial Health Care Syst -- 2,652 Frederick Community College -- 899 Mt. St. Mary's University -- 511 Home Call -- 480 (in home med services) Hood College -- 418	Fort Detrick -- 4,349 (govt), 9,200 (all on campus) National Emergency Training Center -- 577 Fannie Mae -- 250 (data center)	SAIC Frederick -- 1,965 (medical research) Bechtel Power -- 1,578 (engineering) Plamondon Companies -- 396 (hospitality)
Adjacent and Nearby I-81 Corridor Counties			
Berkeley, WV	West Virginia Hospital East -- 900 Regional Education Services Agency -- 450 East Ridge Health System -- 260	US Veterans Administration -- 1,569 (hosp) WV Air National Guard -- 1,230 US Coast Guard -- 1,003 IRS Enterprise Computing Center -- 900 US Bur Alcohol, Tobacco, Firearms -- 614	Ecolab, Inc -- 175
Frederick, VA	Shenandoah University Valley Health System Lord Fairfax Community College Grafton Integrated Health Network	FEMA -- 500-999 FBI -- 250-499 Army Corps of Engineers -- 100-250	
Franklin, PA	Summit Health -- 2,900	Letterkenney Army Depot -- 3,880	
Cumberland, PA	Holy Spirit Health System -- 2,560 Carlisle Regional Medical Center -- 900 Messiah College -- 875 Shippensburg University -- 850 Dickinson College -- 660	State Correctional Institute -- 1,045 US Army War College -- 992 civilians Navy Depot -- 4,571 civilians	Electronic Data Systems -- 1,532 Carlisle Companies -- 1,100 (diversified) Gannett-Fleming -- 800 (engineering co)

Source: Local and state economic development organizations

Table 10. Major Employers (continued)

County	Manufacturing	Distribution	Business and Financial Services
<i>Other Counties (continued)</i>			
Spotsylvania, VA	Quad Graphics GM Powertrain	CVS Pharmacy Distribution Center -- 662	GEICO Insurance -- 3,000+ (in Stafford Co) Intuit -- 400+ (software) A-T Solutions -- 250 (govt. security analysis)
Buncombe, NC	Borg Warner -- 750-999 Eaton Corp -- 750-999 Thermo Fisher Scientific -- 500-759 Arvato Digital Services -- 500-999 Kearfott Guidance & Navigation -- 400-499	US National Climatic Data Center	Sitel -- 500-749
Catawba, NC	CommScope -- 1,000+ (communications cables) Corning Cable Systems -- 1,000+ HDM Furniture Industries -- 500-999 Pierre Foods, Inc -- 500-999 Century Furniture -- 500-999	Merchants Distributors -- 1,500+ (food products) CT Group -- 500-749 (trucking) Target Distribution -- 500-749	Convergys -- 850 (customer service center) Manpower Temp Services -- 800-999 Fiserv, Inc -- 419 Apple iCloud Data Center -- 300 (new)
Florence, SC	NanYa Plastics Corp. Honda of South Carolina -- (all terrain vehicles) GE Medical Systems -- (MRIs) Roche Carolina -- (biopharma research) Nucor Corp -- (steel structural products)	QVC, Inc. -- (telemarketing fulfillment center) IFH Food Distribution Federal Express Ground Johnson Controls -- (auto batteries)	Monster.com JP Morgan Chase TRICARE (Blue Cross Blue Shield) Assurant Solutions
Spartanburg, SC	BMW Manufacturing -- 5,400 (auto mfg) Cryovac -- 1,100 (packaging materials) Milliken Company -- 1,100 (textiles) Michelin North America -- 952 Kohler Co -- 750	Adidas Group -- (sportswear) Wal-Mart -- (return center) Amazon.com -- (online retail goods) GSP North America Co -- (auto parts) EP Equipment USA (HQ)	American Credit Acceptance -- 380 QS/1 Data Systems (HQ) -- pharmacy mgmt syst
Washington, TN	AO Smith -- 1,170 (water heating equip) TPI Corp -- 560 (electric heating equip) Kennametal --264 (metal products)	Cargo Transporters -- 500-999 (trucking)	Citi Commerce Solutions -- 1,950 (call center)
Warren, KY	Sun Products Corp -- 881 (detergents) Bowling Green Metalforming -- 675 Country Oven Bakery -- 453 General Motors Corp -- 449 (auto assembly) Holley Performance Products -- 256	Fruit of the Loom (HQ) -- 1,400	ANFI -- 477 (call center) Dell Services -- 250 (healthcare acctg mgmt) Shop NBC -- 202 (call center)

Source: Local and state economic development organizations

Table 10. Major Employers (continued)

County	Education and Health Care	Federal and State Government	Diversified and Other
<i>Other Counties</i>			
Spotsylvania, VA	Mary Washington Health Care & Hospital -- 2500+ Mary Washington University -- 600-999 Germanna Community College Spotsylvania Regional Medical Center -- 450	Two military bases in adjacent counties -- NSWC Dalgren and Camp A.P. Hill	
Buncombe, NC	Mission Health Systems -- 3,000+ Care Partners -- 750-999 Asheville-Buncombe Tech Comm Coll -- 500-999	VA Medical Center -- 1,000-2,999 US National Climatic Data Center	The Biltmore Company -- 1,000-2,999 Grove Park Inn & Resort -- 1,000-2,999 Ingles Markets, Inc (HQ) -- 1,000-2,999
Catawba, NC	Catawba Memorial Hospital -- 1,500+ Frye Regional Medical Center -- 1,500+ Catawba Valley Community College -- 500-999 Lenoir-Rhyne University -- 300-499		Duke Energy -- 300-499
Florence, SC	McLeod Regional Medical Center Carolina Hospital Francis Marion University Florence Darlington Technical College		
Spartanburg, SC	Spartanburg Regional Health Services -- 5,719 Mary Black Health System -- 1,200 Univ South Carolina Upstate -- 833 Wofford College -- 483 Spartanburg Community College -- 250-399		AFL Telecommunications -- 500 Denny's Corp (HQ) -- 278 (restaurant chain)
Washington, TN	Mountain States Health Alliance (HQ) -- 3,541 East Tennessee State University -- 2,330	VA Medical Center -- 1,592	Advanced call center Technologies -- 1,400 AT&T Mobility -- 650
Warren, KY	Commonwealth Health Care & Hosp -- 2,500 Western Kentucky University -- 1,920		

Source: Local and state economic development organizations

Comment: Types and sizes of major employers vary widely, as does reporting of data. Most sources tend to stress manufacturing employers. The range of industries among large employers found in the 13 counties illustrates opportunities in other areas having similar location characteristics, particularly in the distribution and business and financial services industries. Of particular note is the emergence of the Hickory, NC, area (Catawba County), long known for its still large furniture industry, as a data center location. Apple Corp. is building a \$100 million Apple iCloud data center and solar farm in the Hickory area, made possible in large part by State of North Carolina incentives and favorable energy rates from Duke Energy.

Table 11. Agriculture and Tourism Indicators

County	Agriculture				Tourism	
	Number of Farms, 2007	Land Area in Farms, 2007 (acres)	Value of Products Sold, 2007		Retail Sales per Capita, 2007 (\$)	Accomm & Food Service Sales/Capita, 2007 (\$)
			Total (\$000)	Per Farm (\$)		
<i>Maryland Counties</i>						
Washington	844	114,065	83,691	99,160	16,988	1,584
Frederick	1,442	202,087	127,034	88,095	13,629	1,584
<i>Adjacent and Nearby I-81 Corridor Counties</i>						
Berkeley, WV	833	75,102	21,715	41,356	8,885	1,567
Frederick, VA	676	98,278	27,957	41,356	15,427	1,193
Franklin, PA	1,540	242,634	304,450	197,694	12,343	1,159
Cumberland, PA	1,550	157,388	132,803	85,680	16,179	1,772
<i>Other Counties</i>						
Spotsylvania, VA	359	52,230	8,218	22,893	22,680	2,419
Buncombe, NC	1,077	72,087	37,241	34,578	15,862	3,017
Catawba, NC	737	71,906	30,521	41,413	17,251	1,749
Florence, SC	675	158,717	33,779	50,043	16,919	1,890
Spartanburg, SC	1,242	109,917	26,295	21,172	13,148	1,487
Washington, TN	1,650	160,583	108,569	81,569	16,014	2,117
Warren, KY	1,824	265,125	74,676	40,941	16,186	2,213

Source: 2007 US Census of Agriculture, US Census Bureau

Comment: Agriculture varies widely in importance among the 13 counties, based on the variables shown. In terms of value of farm products sold per farm, Washington County is second only to Franklin County, PA, where the average value per farm is twice that of Washington County. Frederick County, MD, has more farms, more land area in farms, and a higher total value of products sold than Washington County, but a smaller value of sales per farm. Tourism, as measured by retail sales and accommodations and food services sales per capita, appears to be oriented largely to day visitors in most counties. Only Spotsylvania County, VA (Fredericksburg area), and Buncombe County, NC (Asheville area) stand out as overnight leisure travel destinations. Asheville is a well known mountain resort area and the Fredericksburg area is a popular destination for Civil War history and the site of one of the largest shopping centers on the East Coast. Comparatively high retail sales per capita in Washington County, MD, is due in part to the attraction of Hagerstown Premium Outlets, but is also explained by the historical role of Hagerstown as the leading trade center in the surrounding tri-state region.

Table 12. Small Business and Entrepreneurism

County	No. Small Businesses (1)	No. Sole Proprietors (2)	No. Patents Issued (3)	No. Business Startups (4)
<i>Maryland Counties</i>				
Washington	4,636	8,144	5	222
Frederick	7,363	16,299	85	467
<i>Adjacent and Nearby I-81 Corridor Counties</i>				
Berkeley, WV	2,645	5,351	6	134
Frederick, VA	3,819	county -- 5,124	county -- 8	county -- 140
Franklin, PA	4,802	8,812	12	247
Cumberland, PA	7,763	14,197	50	425
<i>Other Counties</i>				
Spotsylvania, VA	4,595	county -- 6,961	county -- 8	county -- 231
Buncombe, NC	10,065	21,924	24	623
Catawba, NC	5,530	10,148	55	307
Florence, SC	4,938	8,546	19	265
Spartanburg, SC	8,890	17,048	47	525
Washington, TN	4,163	7,645	Not Reported	205
Warren, KY	3,699	7,835	14	216

- (1) Companies with fewer than 20 employees.
- (2) Based on 2010 US Census data.
- (3) Based on 2010 data from the US Patent and Trademark Office.
- (4) 2008-09 estimates by Applied Geographic Solutions.

Source: www.zoomprospector.com

Table 13. State and Local Taxes

County	Local Taxes				State Taxes				
	Real Prop (\$/ \$100 AV) (1)	Bus Pers Prop (\$/ \$100 AV)	Sales Tax Rate (%) (2)	Personal Income (%)	Real Property (\$/ \$100 AV)	Base Sales Tax Rate (%)	Personal Income (%)	Corporate Income (%)	Unemploy'm't Ins Max (%)
Maryland Counties									
Washington	0.948	2.37	6.0	2.80	0.112	6.0	5.0 > \$150K	8.25	13.5
Frederick	0.936	0	6.0	2.96	0.112	6.0	5.0 > \$150K	8.25	13.5
Adjacent and Nearby I-81 Corridor Counties									
Berkeley, WV	0.59	0	6.0	0	0	6.0	6.5 > \$60K	7.75	7.5
Frederick, VA	0.55	See Note 3	5.0	0	0	5.0	5.75 > \$17K	6.0	6.87
Franklin, PA	1.25	0	8.0 allowed	1.25	0	6.0	3.07	9.99	6.80-10.82
Cumberland, PA	1.45	0		1.25	0	6.0	3.07	9.99	6.80-10.82
Other Counties									
Spotsylvania, VA	0.88	2.50 (4)	5.0	0	0	5.0	5.75 > \$17K	6.0	6.87
Buncombe, NC	0.525	0	6.75	0	0	4.75	7.75 > \$60K	6.9	6.84
Catawba, NC	0.535	0	7.0	0	0	4.75	7.75 > \$60K	6.9	6.84
Florence, SC	3.05/\$100 of FMV total		8.0	0	0	6.0	7.0 > \$14K	5.0	11.28
Spartanburg, SC	3.04/\$100 of FMV total		6.0	0	0	6.0	7.0 > \$14K	5.0	11.28
Washington, TN	0.764 APV	variable	9.5	0	0	7.0	6.0 > \$15,350	6.5	10.0
Warren, KY	0.623	0.286	6.0	0	0.122 (5)	6.0	6.0 > \$70K	6.0	10.0

Note: AV -- Assessed Value, APV -- Appraised Value, FMV -- Fair Market Value

- (1) States and counties have often have different property assessment methodologies and exemptions, making rate comparisons among states very difficult. Tax rates shown are for counties only. Cities have additional real property taxes.
- (2) Local sales tax rate includes state base rate.
- (3) Frederick County and Winchester have non-manufacturing taxes on tangible personal property, and gross receipts taxes on wholesalers and distributors.
- (4) Tax rate for machinery and tools
- (5) Kentucky has a tax of \$0.15/\$100AV on manufacturing machinery and pollution control equipment and a tax of \$0.05/\$100AV on inventories.

Source: State and local taxing authorities, Tax Foundation

Table 14. State Business Climate Indicators

County	2012 State Business Tax Climate Index Rank					Avg State Gasoline Costs, 10/12	
	Corp Tax	Income Tax	Sales Tax	Property Tax	Overall Rank	Taxes/Gal (\$)	Cost/Gal (\$)
<i>Maryland Counties</i>							
Washington	14	46	9	40	42	41.9	3.548
Frederick	14	46	9	40	42	41.9	3.548
<i>Adjacent and Nearby I-81 Corridor Counties</i>							
Berkeley, WV	24	22	18	25	23	51.8	3.557
Frederick, VA	6	37	6	27	26	38.5	3.377
Franklin, PA	44	12	21	42	19	50.7	3.663
Cumberland, PA	44	12	21	42	19	50.7	3.663
<i>Other Counties</i>							
Spotsylvania, VA	6	37	6	27	26	38.5	3.377
Buncombe, NC	29	43	47	35	44	56.2	3.436
Catawba, NC	29	43	47	35	44	56.2	3.436
Florence, SC	10	39	20	21	36	35.2	3.195
Spartanburg, SC	10	39	20	21	36	35.2	3.195
Washington, TN	13	8	43	48	14	39.8	3.283
Warren, KY	26	25	8	19	22	48.3	3.311

Source: Tax Foundation, GasBuddy.com

Comments: The Tax Foundation ranks Maryland 42nd overall in its Business Tax Climate Index, but Maryland compares very favorably in corporate and sales taxes. Three adjacent states, PA, VA, and WV, rank higher overall, but Maryland ranks higher than PA and WV in corporate and sales taxes and slightly higher than PA in property taxes. Pennsylvania, however, enjoys a significant competitive advantage in personal income taxes. Costs of gasoline, including gasoline taxes, in Maryland are comparable to those in adjacent states, but other eastern states, including SC and TN, have a competitive advantage in this important business cost factor.

Table 15. Cost of Living and Quality of Life Indicators

County	Cost of Living Index (1)	Median Housing Value (\$) (2)	Crime Rate (3)	School District Rating (4)	School District Expenditures per Student (\$) (5)	Health Care Services (6)
<i>Maryland Counties</i>						
Washington	93.7	139,800	Hagerstown -- 301.1	0.529	5,746	196.7
Frederick	119.2	232,400	Frederick -- 329.8	0.649	5,670	183.4
<i>Adjacent and Nearby I-81 Corridor Counties</i>						
Berkeley, WV	92.1	127,100	Martinsburg -- 331.7	0.530	5,306	133.4
Frederick, VA	110.6	180,900	Winchester -- 244.2	0.342	5,582	338.8
-- Winchester	112.3	183,500		NA	6,178	
Franklin, PA	103.8	160,100	Chambersburg -- 341.6	0.346-0.645	5,142	143.7
Cumberland, PA	104.0	159,700	Carlisle -- 241.6	0.594-0.745	5,125	282.9
<i>Other Counties</i>						
Spotsylvania, VA	106.6	161,000	Fredericksburg -- 306.4	0.552	5,041	262.4
-- Fredericksburg	114.1	201,200		0.329	6,323	
Buncombe, NC	106.2	179,400	Asheville -- 369.8	0.512	4,937	419.6
Catawba, NC	84.9	85,900	Hickory -- 419.1	0.550	4,652	241.0
Florence, SC	92.7	102,300	Florence -- 685.8	0.106-0.508	4,596	284.9
Spartanburg, SC	91.5	98,800	Spartanburg -- 711.9	0.336-0.852	4,910	213.5
Washington, TN	89.7	123,900	Johnson City -- 324.5	NA	4,515	709.1
Warren, KY	90.3	122,200	Bowling Green --303.1	0.510	4,550	232.9

(1)(2)(5) www.BestPlaces.net.

(3) www.City-Data.com. 2010 index.

(4) www.SchoolDigger.com. Rating system based on recent national and state data for public school districts. Ranges reflect multiple school districts in county.

(6) www.BestPlaces.net. Number of physicians per 100,000 population.

Comment: Washington County has generally favorable and competitive cost of living and quality of life indicators, particularly in relation to adjacent and nearby I-81 corridor counties, including comparatively low cost of living index, low cost of housing, low crime rate, high school district rating, and high health care index.

Table 16. Economic Development -- Lead Organization and Target Clusters/Industries

County	Lead Organization	Type and Composition	Target Clusters/Industries
<i>Maryland Counties</i>			
Washington	Hagerstown-Washington County Economic Development Commission (EDC) www.hagerstowndec.org	EDC is a county-staffed public agency that also reports to an appointed Board of public and private sector representatives, including 12 private sector embers and 6 ex-officio members.	Advanced Manufacturing Aero Defense Biotechnology (from EDC website)
Frederick	Frederick County Business & Retention Division Operating budget per capita -- \$ www.discoverfrederickmd.com	Department of Frederick County government.	Advanced Technology Agriculture Bioscience Manufacturing Renewable/Sustainable Ind
<i>Adjacent and Nearby I-81 Corridor Counties</i>			
Berkeley, WV	Berkeley County Development Authority www.developmentauthority.com	Public-private partnership with a 20-member Board and 20 Partners/Investors. Staff of 3.	Not found
Frederick, VA	Winchester-Frederick County Economic Development Commission www.winva.com	County-staffed public agency with a 15-member public-private Board. Staff of 5.	Advanced Security Assembly Business Services Food Processing Life Sciences Existing Businesses
Franklin, PA	Franklin County Area Development Corporation www.fcadc.com	FCADC is a 501(c)(6) public-private partnership with a 25-member Board of Directors	Information Technology Business/Financial Services Healthcare Agriculture Green Economy Advanced Manufacturing Transportation/Logistics Hospitality/Tourism
Cumberland, PA	Cumberland Area Economic Development Corp (CAEDC) www.cumberlandbusiness.com	A 501(c)(3) public-private partnership responsible for economic development and tourism, with a 15-member Board, incl 3 county commissioners, and 6-member Executive Committee.	Not found

Source: Local and state economic development agencies

Comment: Lead organizations include county departments (e.g., Frederick, MD), county departments overseen by public-private Boards of Directors (e.g., Washington, MD, and Frederick/Winchester, VA), non-profit public-private partnership organizations (e.g., Berkeley, WV, and Franklin and Cumberland, PA), and chambers of commerce having economic development responsibilities (e.g., Buncombe, NC, and Warren, KY). The largest number of lead organizations in this list are 501(c)(3) or 501(c)(6) public-private partnerships. Some organizations also have responsibility for tourism and/or downtown development.

Table 16. Economic Development Resources -- Lead Organization and Target Clusters/Industries

County	Lead Organization	Type and Composition	Target Clusters/Industries
<i>Other Counties</i>			
Spotsylvania, VA	Fredericksburg Regional Alliance -- FRA is regarded as the lead economic development marketing organization for the City of Fredericksburg and the surrounding four counties. www.fra-yes.org	Public-private partnership with an 18-member Board. Note: Although Spotsylvania County and the City of Fredericksburg have their own economic development agencies, the FRA is regarded by the consultants as the lead marketing body for the Fredericksburg area.	Information Technology Finance & Insurance Health Care Communications/ Entertainm't Chemicals and Materials
Buncombe, NC	Economic Development Coalition of Asheville-Buncombe County www.ashevillechamber.org	Chamber of Commerce public-private affiliate body with 17 members and staff of 7.	Advanced Manufacturing Science & Technology Knowledge-Based Entrepreneurship Arts & Culture Health Care
Catawba, NC	Catawba County Economic Development Corporation EDC Committee of 100 www.catawbaedc.org	EDC is a public-private partnership with a 9-member Board and staff of 6. Committee of 100 is a 501(c)(3) public-private fundraising mechanism. Regular membership is \$1,000/year. 50 founding members pay \$5,000 for 5 years. Staff of 6.	Not found
Florence, SC	Florence County Economic Development Partnership www.fcedp.com	Public-private partnership with 26-Board members, incl. 20 voting members.	Life Sciences Fabrication/Metalworking Distribution/Logistics
Spartanburg, SC	Economic Futures Group www.economicfuturesgroup.com	Public-private partnership with a 23-member Board, and 43 public and private investors, incl. City and County. Staff of 7.	Automotive Plastics Metalworking Distribution
Washington, TN	Washington County Economic Development Council www.thewcedc.com	Public-private partnership with a 30-member Board, incl. 20 voting members, and 29 Strategic (funding) Partners	Not found
Warren, KY	Bowling Green Area Chamber of Commerce www.bgchamber.com	Economic development is a function of the Chamber of Commerce, a non-profit organization with a 26-member Board, including an 8-member Executive Committee. The Chamber has lead economic development marketing responsibilities for Bowling Green and Warren County, the Kentucky Transpark, and South Central Kentucky regional marketing coalition	Not found

Source: Local and state economic development agencies

Table 17. Economic Development -- Local, Regional, and State Allies

County	Local Allies	Regional and State Allies
<i>Maryland Counties</i>		
Washington	Hagerstown-Washington County Industrial Foundation, Inc. Hagerstown-Washington County Chamber of Commerce Hagerstown-Washington County Convention and Visitors Bureau City of Hagerstown Dept of Community and Economic Development Greater Hagerstown Committee Hagerstown Downtown Alliance	Maryland Dept of Business and Economic Development Maryland Technology Development Corporation Tri-County Council for Western Maryland Appalachian Regional Commission
Frederick	Frederick County Chamber of Commerce Tourism Council of Frederick County Fort Detrick Alliance City of Frederick Dept of Economic Development Business Development Advisory Council Agricultural Business Council Downtown Frederick Partnership	Maryland Dept of Business and Economic Development Maryland Technology Development Corporation
<i>Adjacent and Nearby I-81 Corridor Counties</i>		
Berkeley, WV	Martinsburg-Berkeley County Chamber of Comm Martinsburg-Berkeley County Convention and Visitors Bureau Eastern West Virginia Regional Airport Authority	West Virginia Development Office Eastern Panhandle Planning & Development Council
Frederick, VA -- Winchester	Frederick County Industrial Development Authority Winchester-Frederick County Convention and Visitors Bureau Winchester Office of Economic Development	Virginia Economic Development Partnership Northern Shenandoah Regional Commission
Franklin, PA	Greater Chambersburg Chamber of Commerce Greater Waynesboro Chamber of Commerce Greencastle-Antrim Chamber of Commerce Franklin County Visitors Bureau Franklin County Redevelopment Authority Letterkenny Industrial Development Authority	Pennsylvania Dept of Community and Economic Development Team PA Foundation
Cumberland, PA	West Shore Chamber of Commerce Greater Carlisle Area Chamber of Commerce Mechanicsburg Chamber of Commerce Shippensburg Area Chamber of Commerce Cumberland County Industrial Development Authority	Pennsylvania Dept of Community and Economic Development Team PA Foundation Capital Region Economic Development Corp.

Source: Local and state economic development agencies

Table 17. Economic Development -- Local, Regional, and State Allies (continued)

County	Local Allies	Regional and State Allies
<i>Other Counties</i>		
Spotsylvania, VA	Fredericksburg Regional Chamber of Commerce Spotsylvania County Dept of Economic Development Spotsylvania County Economic Development Authority Fredericksburg Tourism and Business Development Dept Fredericksburg Economic Development Authority	Virginia Economic Development Partnership George Washington Regional Commission Rappahannock Economic Development Corporation (REDCO)
Buncombe, NC	Asheville Office of Economic Development Asheville Area Riverfront Development Commission Asheville Downtown Commission Asheville Convention and Visitors Bureau Asheville Regional Airport Authority HUB Community Economic Development Alliance	North Carolina Department of Commerce Western North Carolina Economic Development Group (Advantage West) Western North Carolina Transportation Alliance Land of Sky Regional Council
Catawba, NC	Greater Hickory Convention and Visitors Bureau Catawba County Chamber of Commerce City of Hickory Economic Development Hickory Downtown Development Association	North Carolina Department of Commerce Western Piedmont Council of Governments
Florence, SC	Florence County Progress -- 200 member private ED fundraising organization	South Carolina Department of Commerce
Spartanburg, SC	Spartanburg Area Chamber of Commerce City of Spartanburg Dept of Economic Development Spartanburg Convention and Visitors Bureau Spartanburg Downtown Association	South Carolina Department of Commerce Upstate SC Alliance SC Appalachian Council of Governments
Washington, TN	Economic Development Board Johnson City Development Authority Johnson City Chamber of Commerce Johnson City Convention and Visitors Bureau	Tennessee Dept of Economic and Community Development Tennessee Valley Authority (TVA) First Tennessee Development District
Warren, KY	Bowling Green Area Economic Development Authority Bowling Green Area Convention and Visitors Bureau Downtown Bowling Green Redevelopment Authority	Kentucky Cabinet for Economic Development Barren River Area Development District South Central Kentucky Economic Development Partnership

Source: Local and state economic development agencies

Table 18. Small Business and Workforce Development Resources

County	Small Business Development	Workforce Development
<i>Maryland Counties</i>		
Washington	MD Small Business Development Center, Hagerstown Hagerstown Community College -- 34,000sf Technical Innovation Center (incubator)	Washington County Public Schools, Technical High School Hagerstown Community College, STEM Center and other training programs Pittsburgh Institute of Aeronautics Western Maryland Workforce Consortium
Frederick	MD Small Business Development Center, Frederick Frederick Innovative Technology Center -- 20,00sf incubator Frederick Entrepreneurial Support Network Entrepreneur Council of Frederick County Fort Detrick Business Development Office USAMRMC Office of Small Business Programs	Frederick Community College Frederick County Workforce Services Frederick County Business Council for Education
<i>Adjacent and Nearby I-81 Corridor Counties</i>		
Berkeley, WV	WV Small Business Development Center, Martinsburg	James Rumsey Technical Institute (Vo-Tech) Blue Ridge Community and Technical College
Frederick, VA	Lord Fairfax Small Business Development Center	Lord Fairfax Community College Division of Workforce Services
Franklin, PA	Franklin County First Fund -- loans to \$75,000 Shippensburg University Small Business Development Center	Franklin County Works
Cumberland, PA	Shippensburg University Small Business Development Center Cumberland Small Business Fund -- loans up to \$60,000 Small Business First Fund -- loans up to \$200,000	Cumberland-Perry Area Vo-Tech School ITT Technical Institute Harrisburg Area Community College

Source: Local and state economic development agencies

Table 18. Small Business and Workforce Development Resources (continued)

County	Small Business Development	Workforce Development
<i>Other Counties</i>		
Spotsylvania, VA	Mary Washington University Small Business Development Center MWU Information and Technology Convergence Center Rappahannock Economic Development Corp (REDCO)	Germanna Community Coll Center for Workforce and Community Education Fredericksburg Region Workforce Resource Center
Buncombe, NC	NC Small Business Technology Development Center, Asheville Asheville-Buncombe Small Business Center “Tools for Business Success” -- Small Business Toolbox	Asheville-Buncombe Technical Community College
Catawba, NC	NC Small Business Technology Development Center, Hickory Catawba Valley Community College Small Business Center NC Center for Engineering Technologies, Appalachian State Univ. www.startsomethinghere.com	Catawba Valley Community College NC Center for Engineering Technologies, ASU Western Piedmont Workforce Development Board, “Grow Your Own Biz”
Florence, SC	SC Small Business Development Center, Florence-Darlington Technical College	Florence-Darlington Technical College, Southeastern Institute for Manufacturing and Technology “readySC” -- part of the SC technical college system
Spartanburg, SC	Spartanburg Small Business Development Center (under Clemson U) Spartanburg Development Corporation (loans, technical asst) Appalachian Council of Governments (loans, technical asst) Appalachian Development Corporation (loans, technical asst) SC Launch! -- private university collaborative (funding, counseling) FastTrac South Carolina initiative	The Tech Prep/School-to-Work Initiative “readySC” -- part of the SC technical college system Spartanburg Community College Upstate Workforce Investment Board
Washington, TN	East Tennessee State U Innovation Lab -- medical/technical start-ups Tennessee Small Business Development Center, Johnson City “Will This Float” -- annual small business idea competition “Hype” Helping Young Professionals Excel -- networking and mentoring	Northeast State Community College The UT Center for Industrial Services Tennessee Technology Center -- on campus and online programs Bailey Computing Technologies, Inc -- IT training services
Warren, KY	KY Small Business Development Center, Bowling Green Western Kentucky Univ Innovation & Commercialization Center	Warren Area Technology Center (ATC) Bowling Green Technical College (several campuses) Western Kentucky University (4-year) -- 20,000+ enrollment Bluegrass State Skills Corporation (BSSC) Training Consortium of South Central Kentucky

Source: Local and state economic development agencies

Comment: A number of interesting small business development initiatives and programs were found among the 13 counties profiled. These include small business loan programs in Franklin and Cumberland Counties, PA; the Small Business Toolbox in Buncombe County, NC; and the “Will This Float” competition and “HYPE” program in Washington County/Johnson City, TN. A number of areas have technology centers for small business and workforce development, but only in a few areas, including Washington County, MD, were business incubator facilities found.

Table 19. Industrial and Office Inventory

County	Industrial Sites and Buildings				Office Facilities	
	No. Sites	Largest Site/ Total Acres	No. Buildings	Largest Bldg/ Total Space (SF000)	No. Properties	Largest Bldg/ Total Space (SF000)
<i>Maryland Counties</i>						
Washington	18	524 / 1,543	9	122 / 515	6	39 / 165
Frederick	29	181 / 990	39	214 / 2,633	24	300 / 1,710
<i>Adjacent and Nearby I-81 Corridor Counties</i>						
Berkeley, WV	10	261 / 1,075	9	417 / 1,176	1	8
Frederick, VA	18	540 / 2,135	16 (1)	300 / 1,167	13	245 / 476
Franklin, PA	2	200 / 240	1	837	None listed	---
Cumberland, PA	19	300 / 576	37	873 / 8,461	25	250 / 567
<i>Other Counties</i>						
Spotsylvania, VA	26	980 / 2,826	27	271 / 1,723	32	80 / 749
Buncombe, NC	7	102 / 431	16	208 / 1,235	2	48 / 89
Catawba, NC	83	240 / 3,000	76	455 / 4,497	15	25 / 200
Florence, SC	28	1,522 / 5,662	16	272 / 1,748	None listed	---
Spartanburg, SC	39	1,316 / 7,238	31	563 / 3,799	None listed	---
Washington, TN	2	95 / 142	8	298 / 1,007	2	28 / 39
Warren, KY	6	417 / 1,141	7	459 / 1,007	None listed	---

(1) Includes 2 “virtual” buildings -- 300,000SF and 137,000SF.

Source: State economic development agency site databases

Comment: Content, consistency, and accuracy of state industrial site and building databases appear to vary widely. An example is the vast differences in the number of sites and buildings listed in Franklin County and Cumberland County, PA. Many state databases include office buildings, but others do not. In addition, data on available office space is more than likely to be suburban and business park office space, not necessarily urban/downtown space. No attempt has been made in this analysis to compare state and local site and building databases, but it is important that the Hagerstown-Washington County EDC monitor the DBED database to ensure its completeness and accuracy.

Table 20. Transportation Infrastructure and Special Business Incentive Zones

County	Major Highways	Railroads and Intermodal Facilities	Airports	Incentive Zones
<i>Maryland Counties</i>				
Washington	Intersection of I-70 and I-81	CSX, Norfolk Southern	Hagerstown Regional Airport Main runway -- 7,000ft Sun Air service to Dulles Alegiant service to Orlando, FL	3 Enterprise Zones - 6,650ac, incl downtown Hagerstown FTZ #255 at airport
Frederick	Intersection of I-70 and I-270	CSX, Conrail, (MARC commuter service), Amtrak	Frederick Municipal Airport Main runway - 5,220ft	None found
<i>Adjacent and Nearby I-81 Corridor Counties</i>				
Berkeley, WV	I-81	CSX, Norfolk Southern Studying inland port concept	Eastern WV Regional Airport Main runway -- 7,815ft	FTZ #240 Martinsville (actually in Front Royal, Warren Co, VA)
Frederick, VA	I-81	CSX, Norfolk Southern, Virginia Inland Port in adjacent Warren County, VA	Winchester Regional Airport Main runway -- 5,500ft	None found
Franklin, PA	I-81	CSX Intermodal -- Chambersburg Norfolk Southern Intermodal -- Greencastle	Franklin County Regional Airport Main runway -- 3,300ft	Keystone Opportunity Zone and FTZ #147, both in Letterkenney Army Depot area
Cumberland, PA	I-76 (PA Turnpike), I-81, I-83	CSX, Norfolk Southern	Harrisburg International Airport nearby, served by 7 airlines	Included in Harrisburg Regional Technology Corridor Enterprise Zone
<i>Other Counties</i>				
Spotsylvania, VA	I-95	CSX, Virginia Railway Express (commuter), Amtrak		3 designated Technology Zones in county, all of Fredericksburg is designated a HUB Zone
Buncombe, NC	Intersection of I-26 and I-40	Norfolk Southern	Asheville Regional Airport Main runway -- 8,000ft Served by 4 airlines	None found

Source: Local economic development organizations and various other sources

Table 20. Transportation Infrastructure and Special Business Incentive Zones (continued)

County	Major Highways	Railroads and Intermodal Facilities	Airports	Incentive Zones
<i>Other Counties (continued)</i>				
Catawba, NC	I-40, US321 freeway	Norfolk Southern	Hickory Regional Airport Main runway -- 6,400ft No commercial air service	None found
Florence, SC	Intersection of I-20 and I-95	CSX	Florence Regional Airport Main runway -- US Airways service to Charlotte	None found
Spartanburg, SC	Intersection of I-26 and I-85	CSX	Greenville-Spartanburg Intl. Main runway -- 11,000ft Served by 7 airlines	FTZ #38, 3 subzones 131 acres, plus BMW plant site Enterprise Zone -- yes
Washington, TN	Intersection of I-26 and I-81	CSX	Tri-Cities Regional Airport (nearby) Main runway -- 8,000ft Served by 3 airlines	FTZ #204 at airport
Warren, KY	I-65	CSX	Bowling Green Warren Regional Airport Main runway -- 6,500ft	None found

Source: Local economic development organizations and various other sources