



REGIONAL SNAPSHOT

Industry Cluster Analysis

**Northern Shenandoah Valley Regional Partnership
(NSVRP), Virginia**



Center for Regional Development
Advancing Collaboration : Energizing Regions

Table of contents

01 Overview

02 Industry Cluster Analysis

01 overview

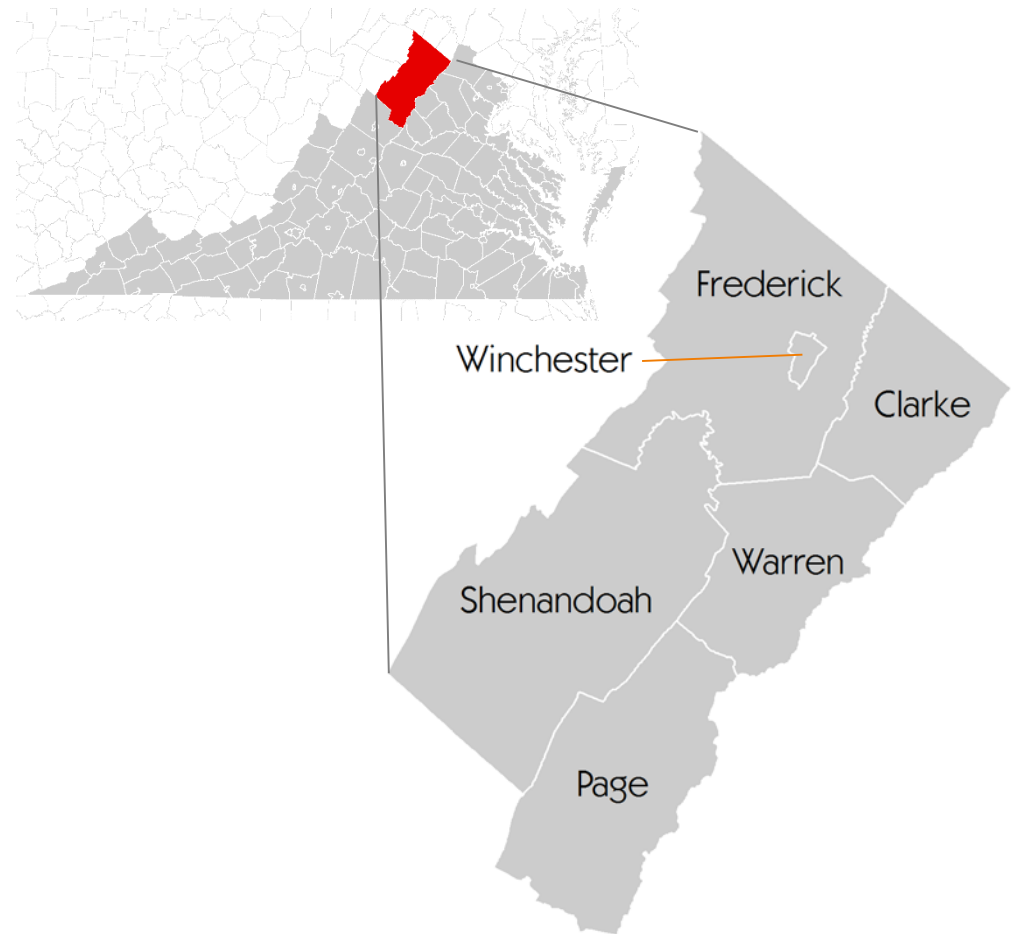
**Northern Shenandoah Valley
Regional Partnership, VA**

Overview

Northern Shenandoah Valley Regional Partnership, VA

Northern Shenandoah Valley Regional Partnership (NSVRP) Region is comprised of six Virginia counties. I-81 crosses the region from south to north and connects to I-70 to the north. I-66 connects the region to Washington, DC.

- Clarke
- Frederick
- Page
- Shenandoah
- Warren
- Winchester



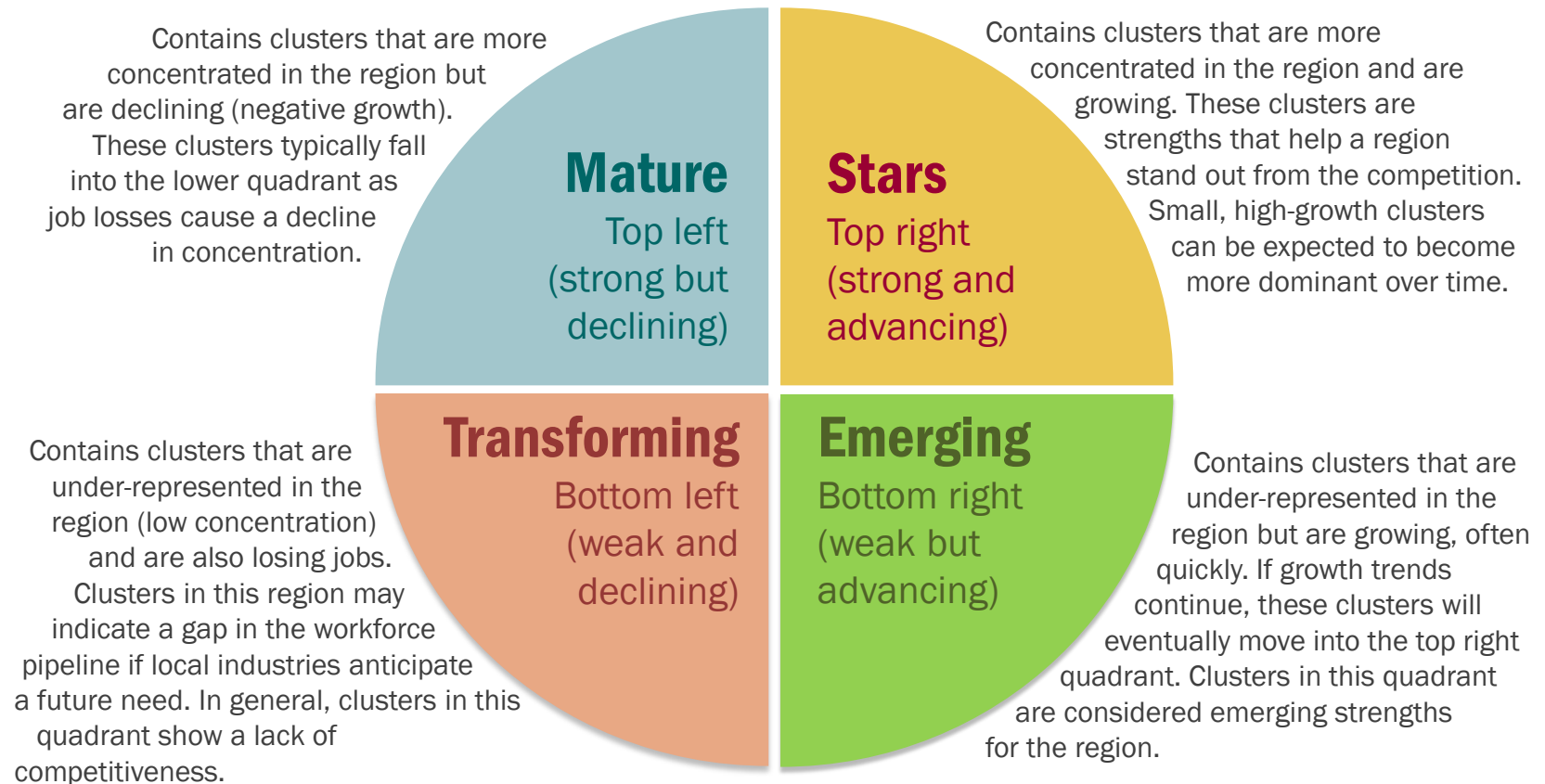
02 industry cluster analysis

**Northern Shenandoah Valley
Regional Partnership, VA**

Industry cluster analysis

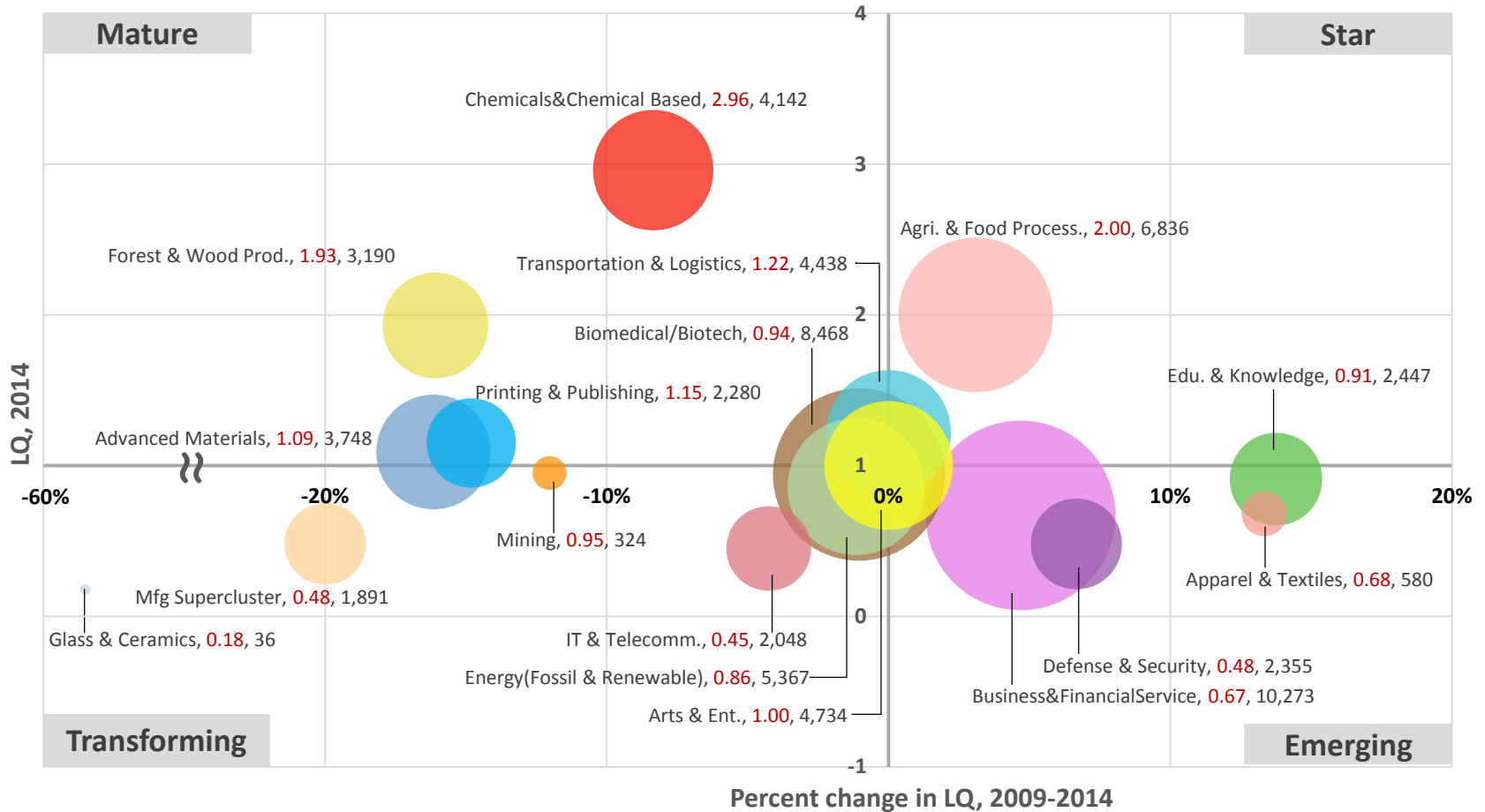
How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



Industry and occupation

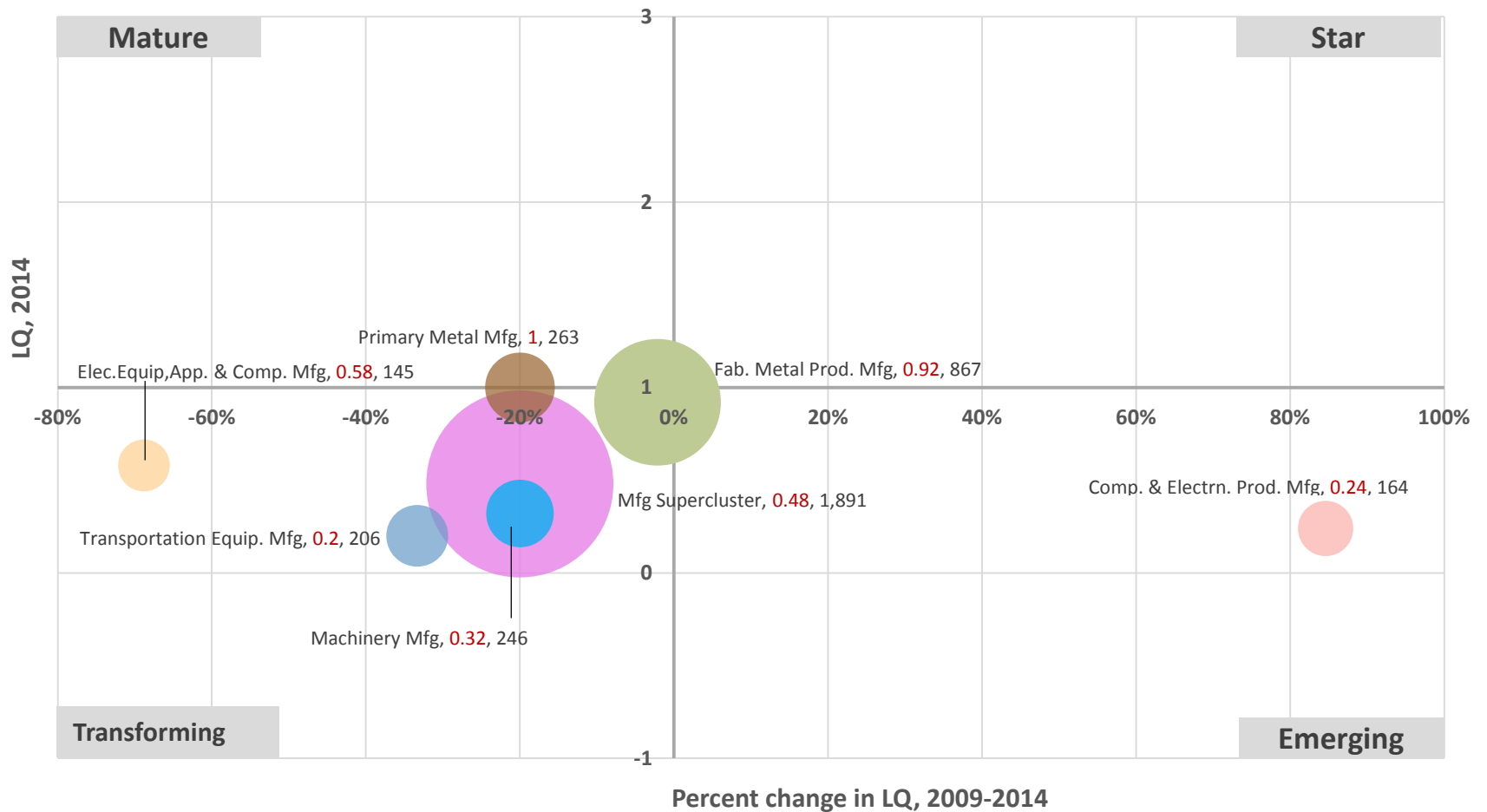
Industry cluster bubble chart



Note: Label includes cluster name, LQ 2014, and Employment 2014.
Glass and ceramics cluster has too few jobs.

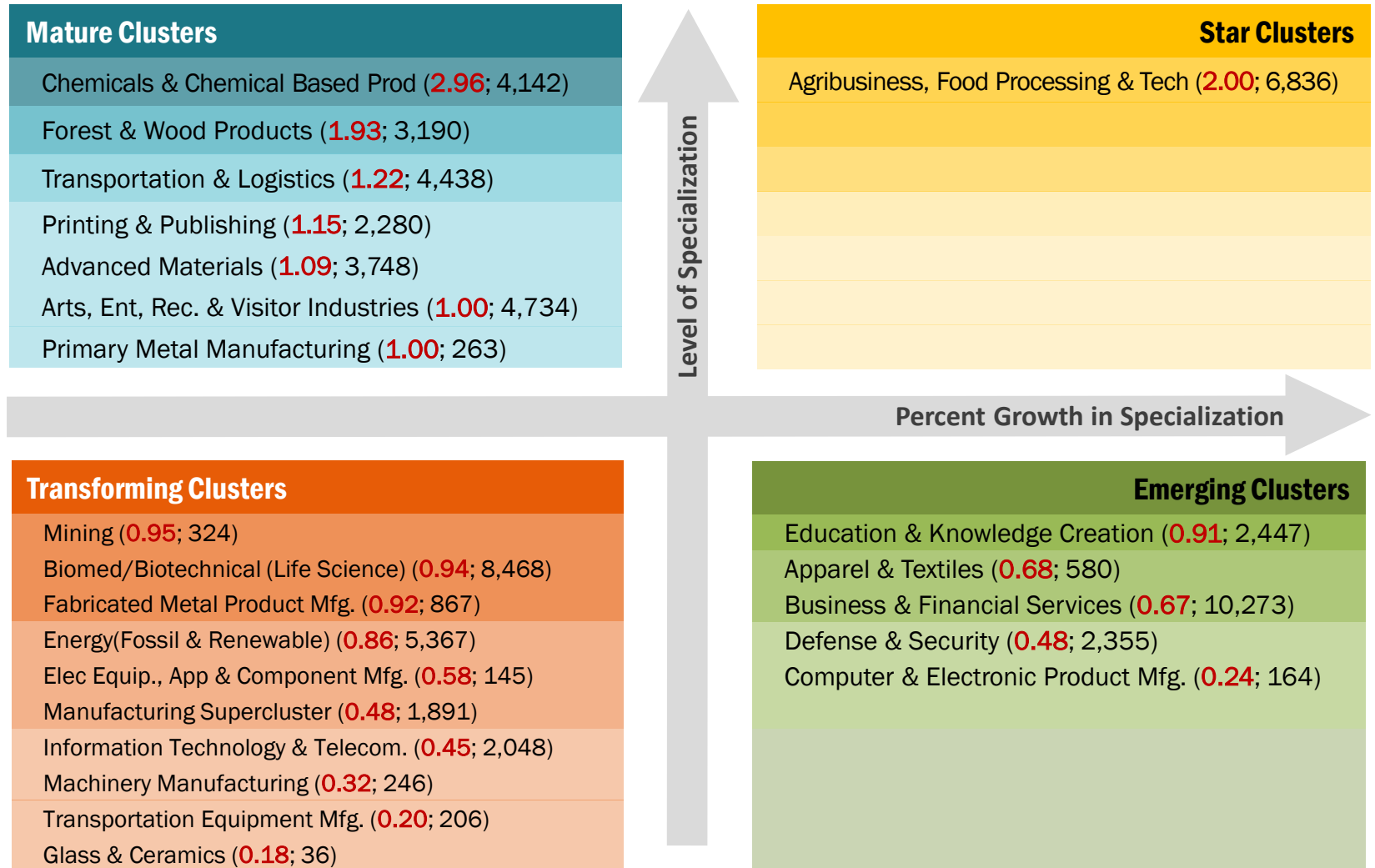
Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ 2014, and Employment 2014.

Industry cluster analysis



Note: Glass and ceramics cluster has too few jobs.

section 02

NOTE: The first number after each cluster represents its location quotient while the second number represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient.

Industry and occupation

Bubble chart interpretation

Mature Industries

Seven industry clusters in the NSVRP Region are in the Maturing stage: Chemicals & Chemical Based Prod, Forest & Wood Products, Transportation & Logistics, Printing & Publishing, Advanced Materials, Arts, Ent, Rec. & Visitor Industries, Primary Metal Manufacturing. These industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the NSVRP Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the NSVRP Region, 10 transforming clusters include Mining, Biomed/Biotechnical, Fabricated Metal, Energy, Elec. Equip., Manufacturing Supercluster, IT & Telecom., Machinery Mfg., Transportation Equip. Mfg., and Glass & Ceramics. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The only highly concentrated Star industry cluster in the NSVRP Region is Agribusiness, Food Processing & Technology. Its location quotient is 2.00, indicating that the cluster is 2 times more concentrated in the region compared to the U.S.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are five Emerging clusters in total in the NSVRP Region. Education & Knowledge Creation, Apparel & Textiles, Business & Financial Services, Defense & Security, and Computer & Electronic Product Manufacturing.