

TARGET INDUSTRY ANALYSIS



Planning and Zoning Conference

June 11, 2011

MS&B Moran, Stahl & Boyer
Site Selection and Economic Development Consultants

Moran, Stahl & Boyer Profile: **Services Provided**



Corporate Site Selection

- Deployment strategies
- Location/site selection
- Feasibility analysis
- Incentive negotiations
- Relocation policy/strategy
- Labor market analysis
- Facility marketing support



Economic Development Consulting

- Strategy development
- Resource assessments
- Site evaluation/certification
- Labor market studies
- Target industry analysis
- Community workshops
- Speaking on multiple aspects of economic development

Moran, Stahl & Boyer Profile: Sample of Client Base

Corporate Site Selection



Economic Development

- British Columbia
- Connecticut
- Delaware
- Florida
- Georgia
- Massachusetts
- Minnesota
- Nebraska
- Newfoundland/Labrador
- New Hampshire
- New York
- Pennsylvania
- Rhode Island
- Texas
- Virginia



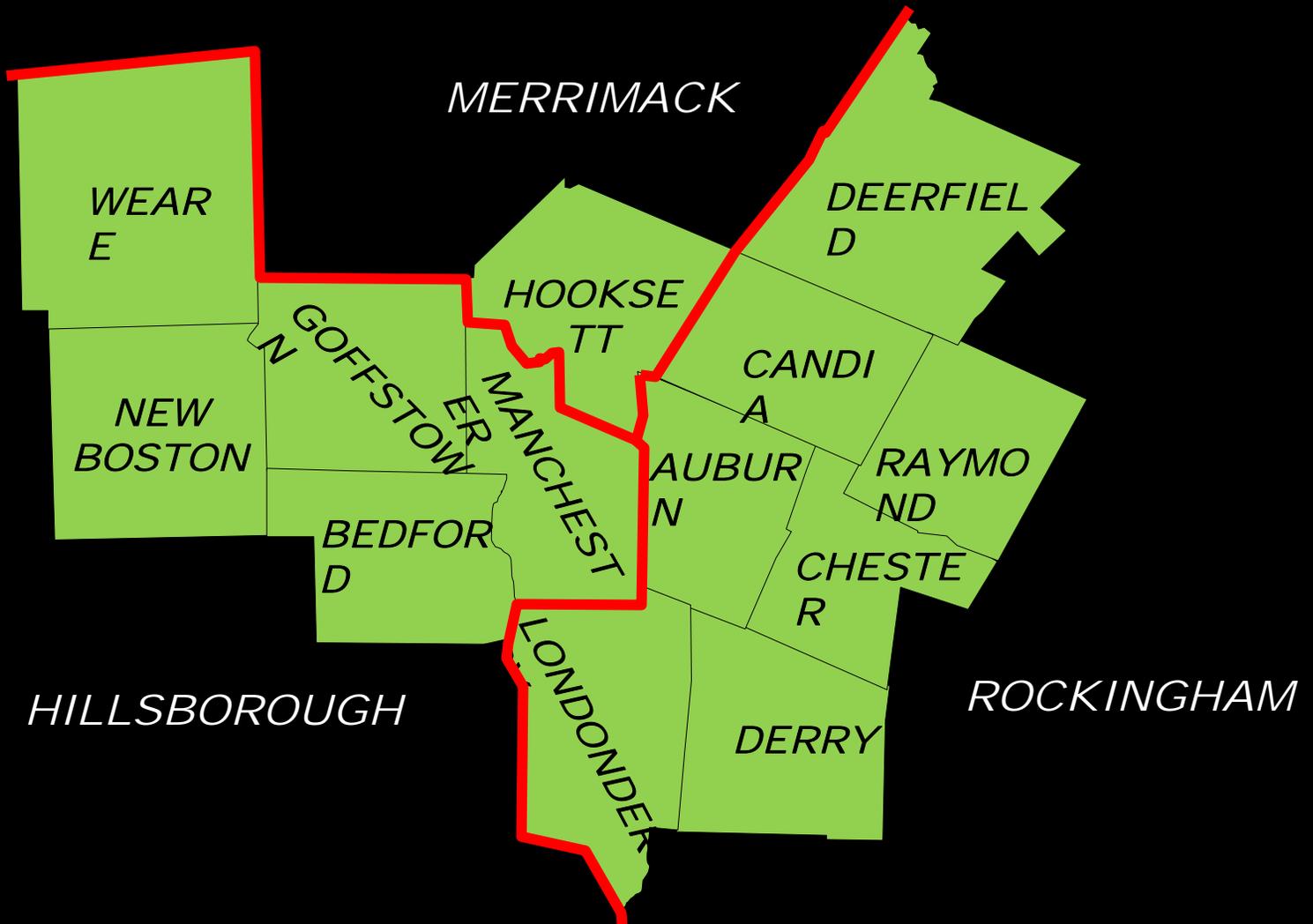
What types of jobs and business opportunities are available for our region and individual towns?

Why Identify Target Industries?

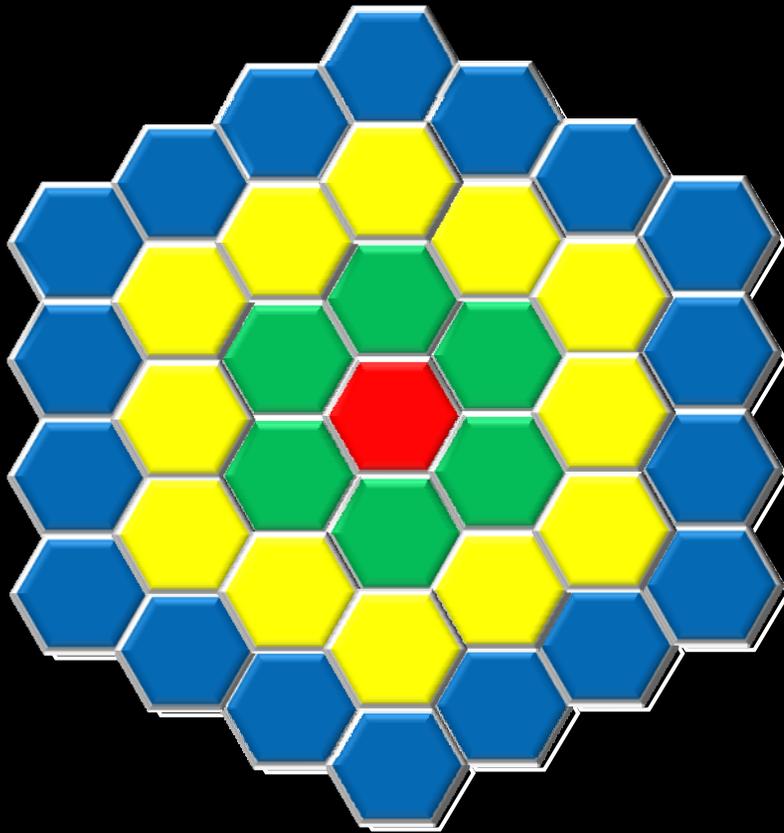


- ▶ Aligns Resources With Potential Opportunities.
- ▶ Defines Realistic Options for Enhancing the Local Economic Portfolio.
- ▶ Becomes the Basis for an Economic Development Strategy.

Southern New Hampshire Planning Commission
13 Towns Within 3 Counties



Local Economic "Portfolio"



Resources



Level 1 - Primary Industries

Employers that infuse money into the county from outside sources, such as:

- State/Federal Government
- Agriculture
- Manufacturing
- Colleges/Universities
- National Financial Services Firms
- Business Services (with outside clients)
- Regional Healthcare Operations
- Regional Retail Operations
- Regional Distribution Operations
- Tourism-Related Businesses



Level 3 - Resident Support

Provide services to local residents
(Retail, personal services, local gov't)

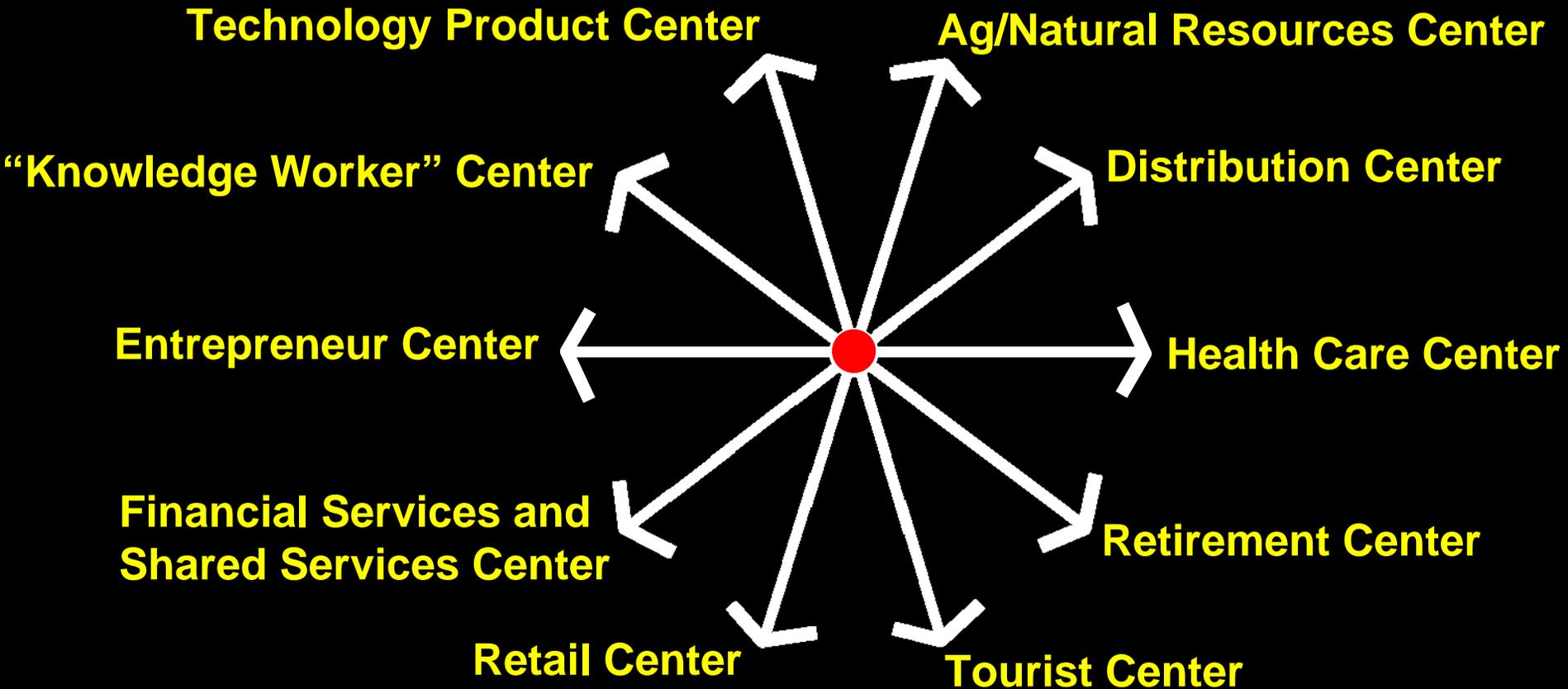


Level 2 - Business Support Services

Provide support service to the primary industries located in the county

Consider: Quality/Variety of Jobs and Size of Tax Base vs. Demand for Local Services

Centers for Specific Economic Activity (Clusters)



Center = A Significant Alignment of Resources

Balanced Land Use That Supports Economic Development

Businesses that Provide On-Going Jobs and Pay Taxes

- Manufacturing.
- Warehousing.
- Offices for multiple segments.
- Retail operations.
- Hospitality.
- Health care.

Quality of Life Attributes

- Residential developments.
- Schools.
- Cultural/historic facilities.
- Religious and other non-profit organizations.

Roads, Utilities and Government Facilities

All Facets of Agriculture and Natural Resource Industries.

Parks, Water, Wetlands, Forests and Other Natural Areas.

Six Factors for Considering Economic Opportunities

External Considerations

1. Identify high potential market needs and trends.
2. Align with state's industry strengths/competitiveness.
3. Competitiveness with peer communities.

Internal/Local Considerations

4. Identify existing industry presence.
5. Define available resources vs. industry needs.
6. Align with desires of local stakeholders.

Economic Opportunities Derived From Market Drivers/Needs

Overall Market Drivers/Trends

- Global Dynamics (India/China)
- Technology Trends
- Impacts From Recession
- Demographic Shifts
- Sustainability
- Technical Talent Pool
- World Unrest/Terrorism
- Sourcing/Logistics Strategies
- Government Policies

Examples of Market Needs Categories

Education	Food/Nutrition	Health Care	Communications
Environment	Energy	Transportation	Defense/Security
Entertainment	Homes/Buildings	Financial Security	Work Options

Economic Sectors That Fulfill Market Needs

Services	Mfg. of Substances	Mfg. of Hardware	Commerce
<ul style="list-style-type: none"> • Professional • Technical • Creative 	<ul style="list-style-type: none"> • Chemicals/Materials • Pharma/Nutra/Foods • Fuels 	<ul style="list-style-type: none"> • Equipment • Parts/Components 	<ul style="list-style-type: none"> • Transportation • Warehousing • Wholesale/Retail

Resources Required to Support Economic Growth

Access to Innovations/R&D Applied Toward New Products, Processes and Techniques Derived From University, Private Industry and Government R&D Activities.				
Real Estate	Labor	Education/Training	Utilities/Computing Power	Quality of Life
Transportation Access	Business Start-Up Resources		Business Environment/Amenities	

Overall Economic Drivers vs. Local Opportunities

Food Safety/Nutrition



Environment



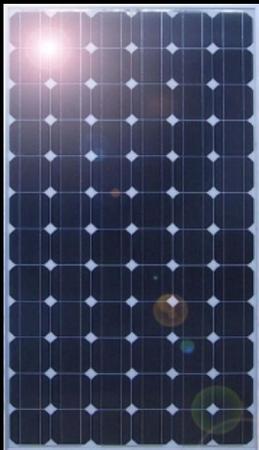
Health Care



Defense/Security



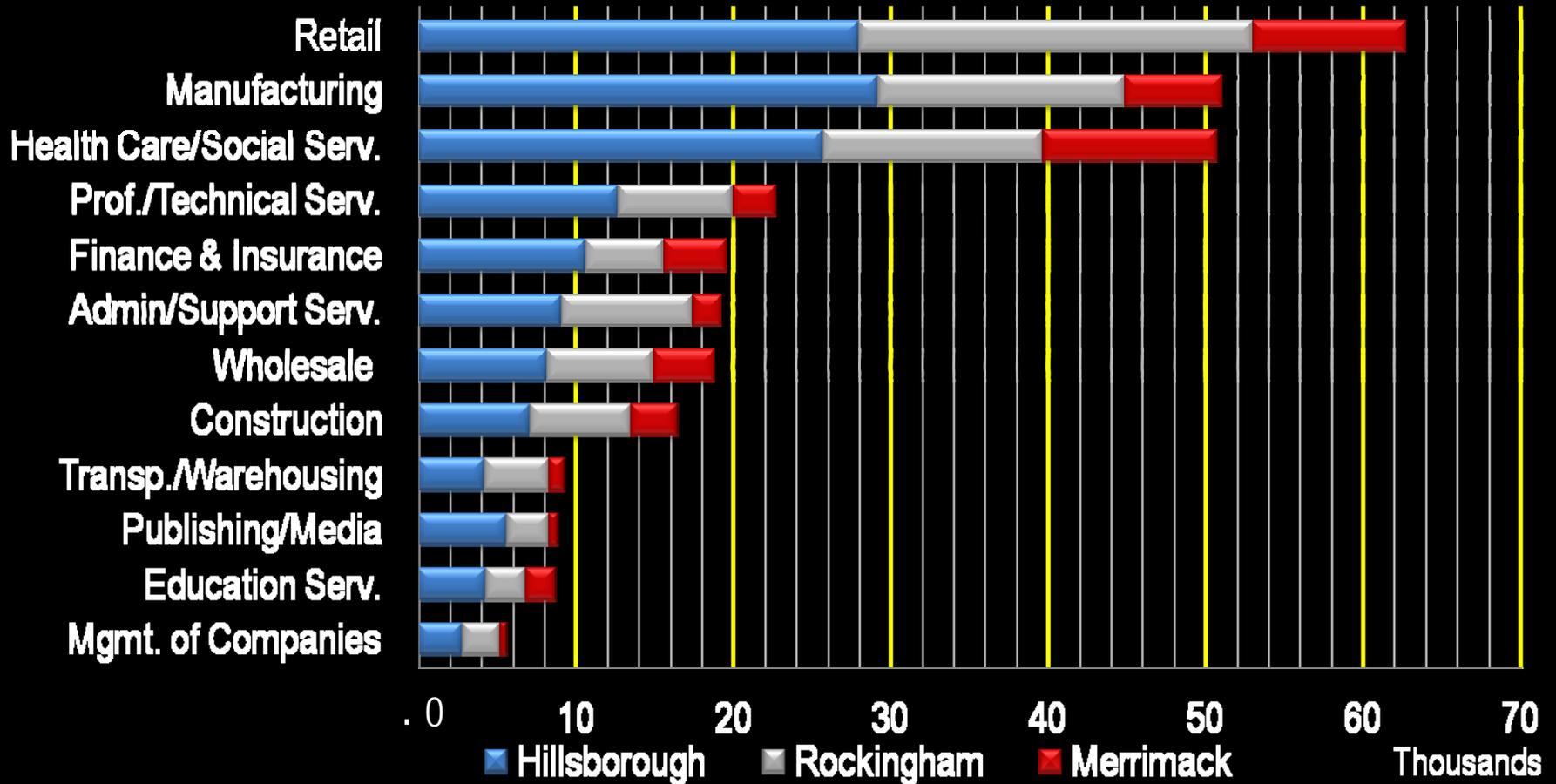
Energy



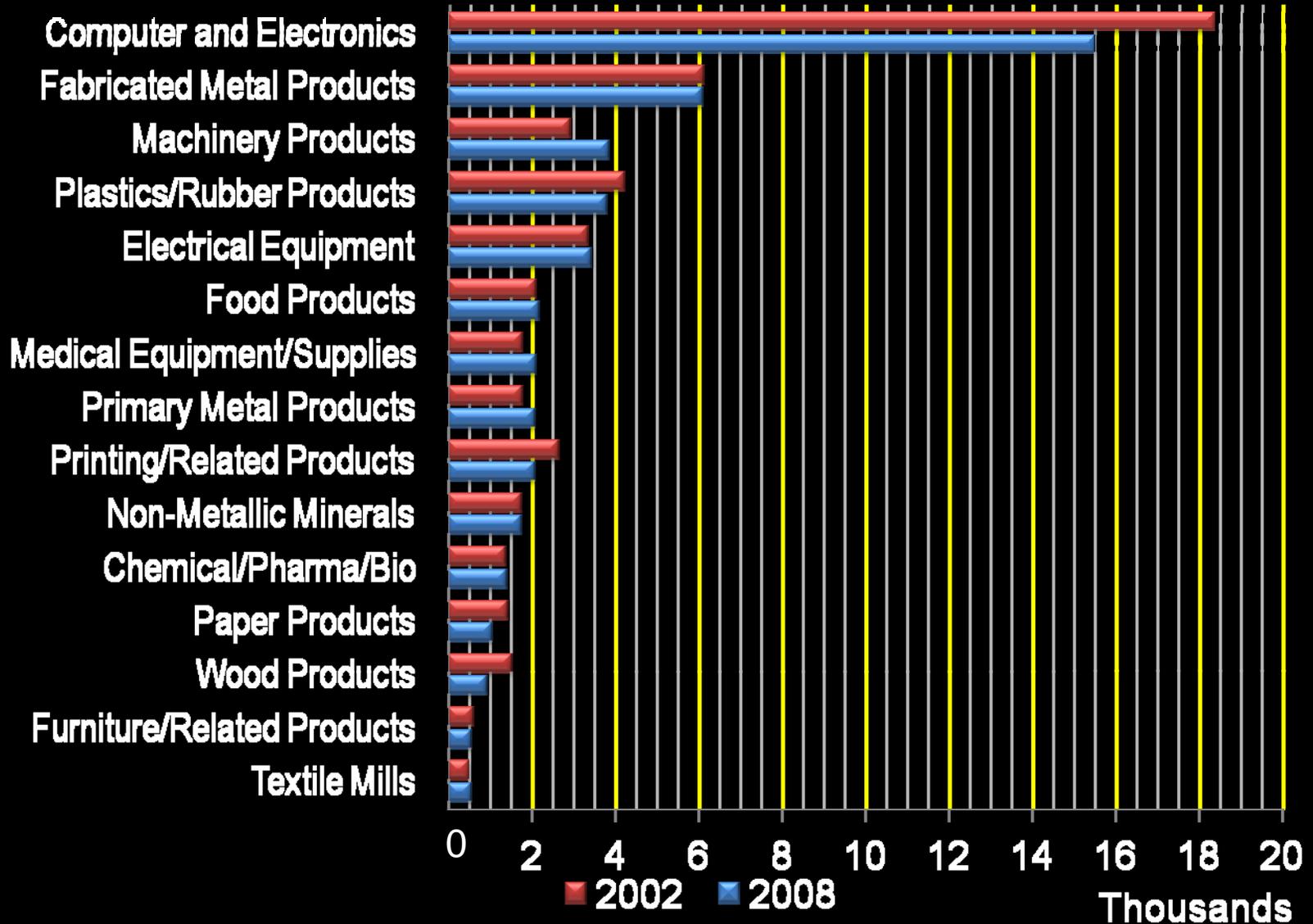
Telecommunications



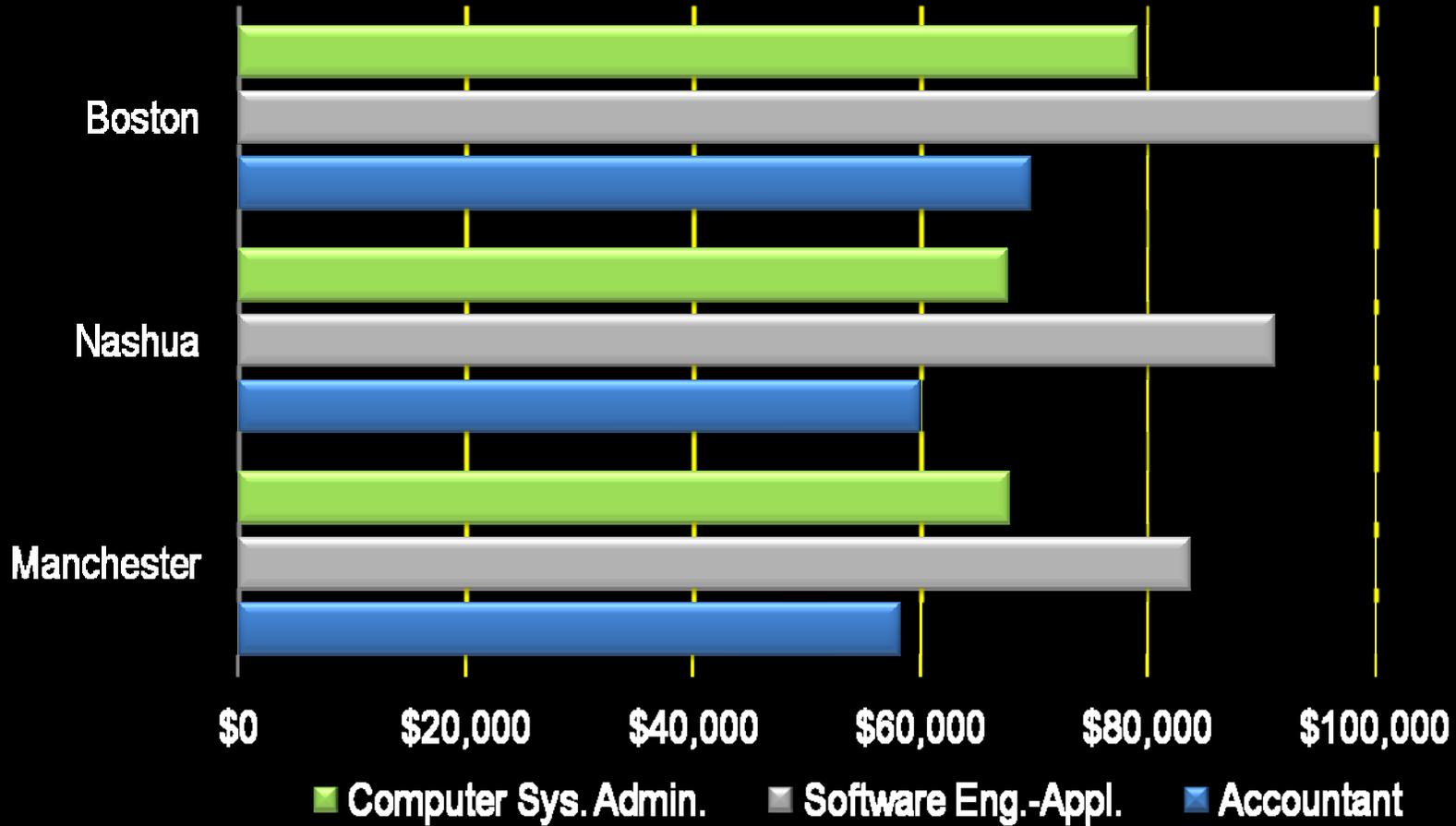
Employment by Industry/Economic Sector



Manufacturing Employment: 2002 vs. 2008

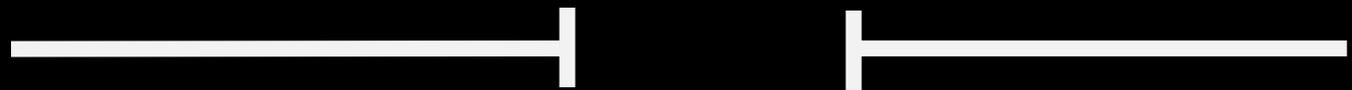


Salary Differentials: Computer Specialists and Accountants



Resource Evaluation

Resource	Needs of Industry/Operation	Existing Resources
Sites/Buildings		
Labor /Skills		
Education/Training		
Transportation		
Utilities		
Financial/Incentives		
Quality of Life		



Resource Gap Analysis

Real Estate Needs by Type of Operation

Headquarters



- Downtown lease
- Suburban lease
- Suburban built to suit

Back Office



- Leased building with parking
- Competitive access to labor

R&D Center



- Low cost leased facility
- Built to suit corporate facility/campus
- Access to talent and R&D partners

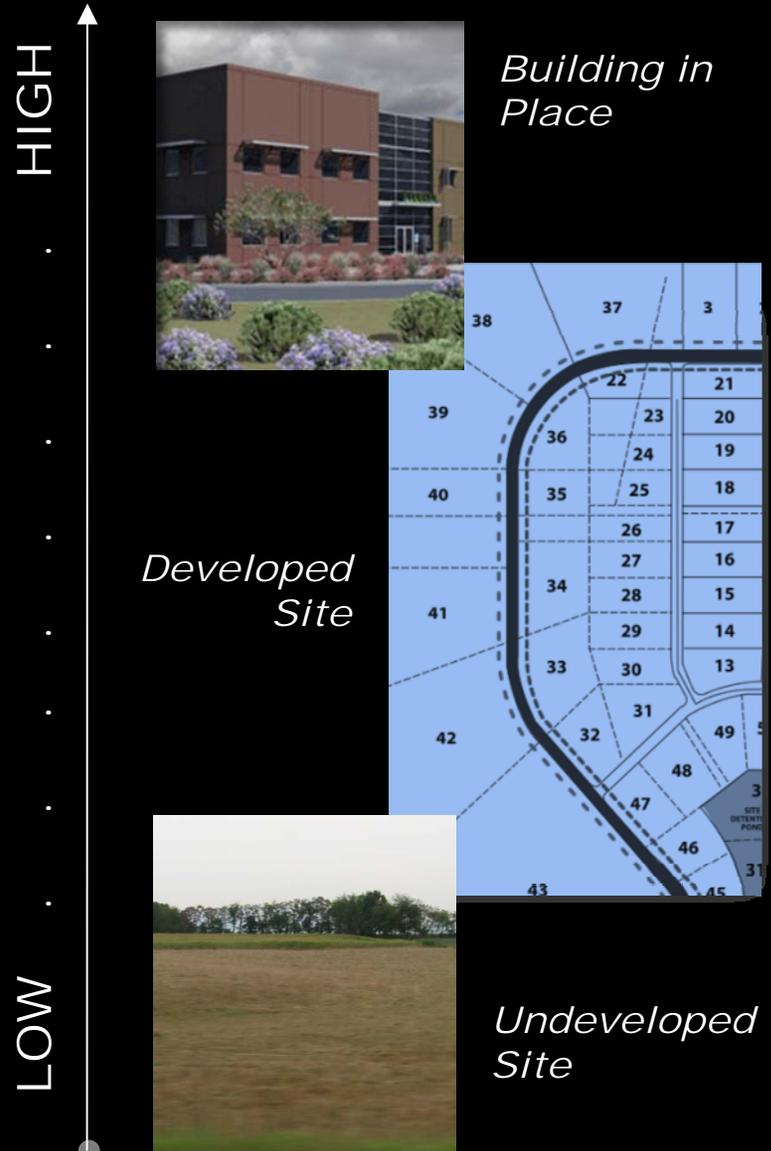
Manufacturing



- Lease/purchase existing building
- Flex buildings are popular
- Purchase land for specialized facilities

Levels of Site Readiness

- *Level 1* - Developed site, new building needing finish or minor modifications.
- *Level 2* - Developed site, building shell in place or existing building needing modest renovation.
- *Level 3* - Developed site with virtual permitted building.
- *Level 4* - Developed site ready for building construction.
- *Level 5* - Undeveloped Shovel Ready site.
- *Level 6* – Properly zoned but in hands of original owner.
- *Level 7* - Land zoned agriculture but is to be zoned industrial or office/industrial.



Type 1 Expand/Attract/Start-Up Businesses

- ▶ Back Office, Shared Service and Customer Interface
- ▶ Headquarters Operations
- ▶ Manufacturing of Parts, Components and Assemblies
- ▶ Manufacturing of Machinery and Equipment
- ▶ Professional, Technical and Scientific Services



Target Industries Defined

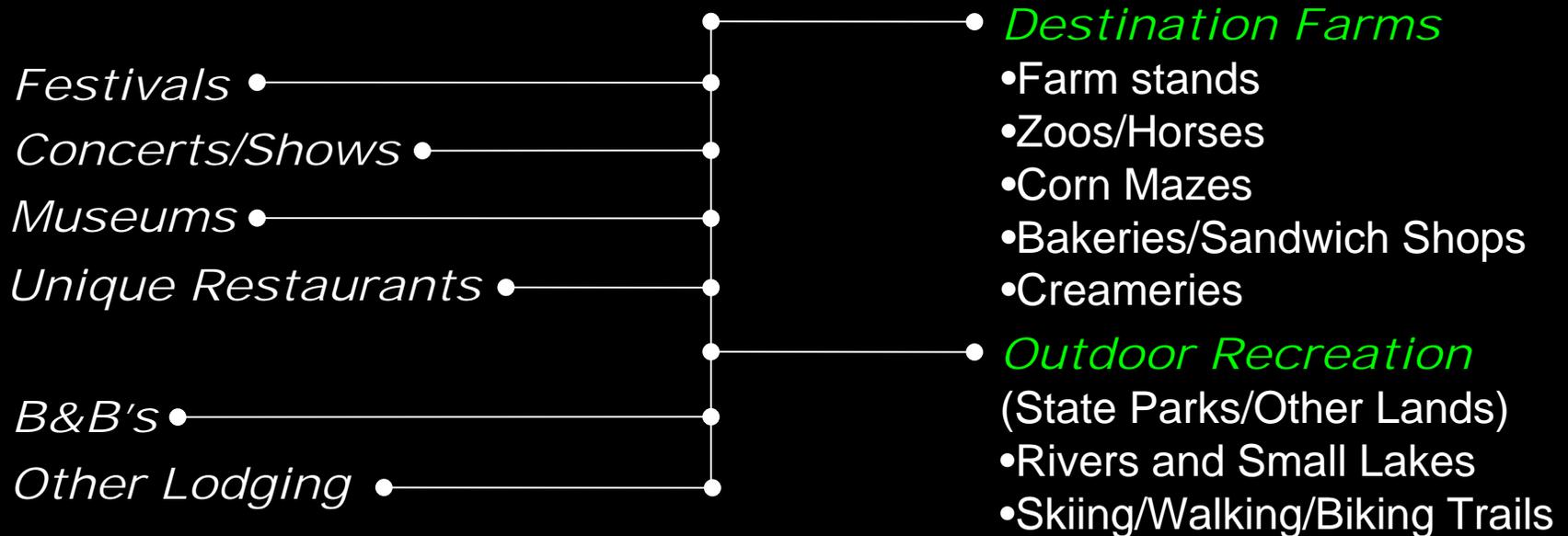
Type 2 Expand With Regional Economy

- ▶ Regional Retail
- ▶ Regional Health Care
- ▶ Regional Distribution



Type 3 Enhance Existing Traditional Segments

- ▶ Tourism-Related
- ▶ Agricultural-Related



Target Industries by Community

Type 1: Expand/Attract/Start-Up

Industry/Economic Segment	Auburn	Bedford	Candia	Chester	Deerfield	Derry	Goffstown	Hooksett	Londonderry	Manchester	New Boston	Raymond	Weare
Back Office, Shared Service and Customer Interface	■	■				■	■	■	■	■			
Headquarters Operations		■							■	■			
Mfg. Parts, Components and Assemblies	■		■	■	■	■	■	■	■	■	■	■	■
Mfg Machinery and Equipment	■		■	■	■	■	■	■	■	■	■	■	■
Professional, Technical and Scientific Services	■	■	■	■	■	■	■	■	■	■	■	■	■

Target Industries by Community

Type 2: Regional Economy-Based

Industry/Economic Segment	Auburn	Bedford	Candia	Chester	Deerfield	Derry	Goffstown	Hooksett	Londonderry	Manchester	New Boston	Raymond	Weare
Regional Retail		■						■	■	■			
Regional Health Care									■	■			
Regional Distribution									■			■	

Target Industries by Community

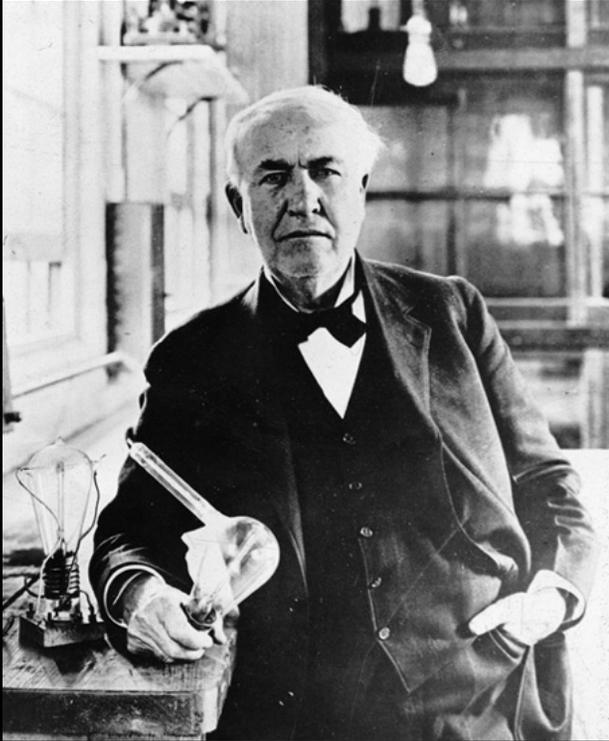
Type 3: Tourism/Agriculture

Industry/Economic Segment	Auburn	Bedford	Candia	Chester	Deerfield	Derry	Goffstown	Hooksett	Londonderry	Manchester	New Boston	Raymond	Weare
Tourism-Related	■		■	■	■	■	■	■		■	■	■	■
Agriculture-Related	■		■	■	■	■	■	■			■	■	■

Economic Development Strategic Plan



Words of Wisdom



*“Luck is when preparedness
collides with opportunity.”*

- Thomas Edison