

Chapter 6 – Economic Analysis

Sector Analysis

Chapter 6, *Economic Analysis*, includes an examination of employment trends by industry for Juniata County residents in 2000. This data addresses the employment of workers of 16 years or more of age who resided within the county. While it does not measure jobs located within Juniata County it does provide insights into the county economy. Changes in patterns are also important, as **Table 6-1** illustrates. Manufacturing continues to employ large numbers of Juniata County residents (23.6% compared to 16.0% statewide), but the growth between 1990 and 2000 has been greatest in the other services category, which includes traditional tourism businesses. Health services, finance, insurance, real estate, public administration and wholesale trade have also employed much larger numbers of residents.

Table 6-1: Employed Persons 16 Years and Over by Industry

	1990		2000		90-00 Change	
	Total	%	Total	%	Total	%
Other services (including tourism)	507	5.3%	1,006	9.5%	499	98.4%
Health services	649	6.8%	1,108	10.5%	459	70.7%
Finance, insurance, and real estate	400	4.2%	588	5.6%	188	47.0%
Public administration	482	5.1%	657	6.2%	175	36.3%
Wholesale trade	255	2.7%	369	3.5%	114	44.7%
Transportation	584	6.1%	650	6.1%	66	11.3%
Educational services	557	5.8%	591	5.6%	34	6.1%
Communications, information and utilities	168	1.8%	183	1.7%	15	8.9%
Construction	986	10.3%	988	9.3%	2	0.2%
Other professional and related services	383	4.0%	384	3.6%	1	0.3%
Manufacturing	2,642	27.7%	2,499	23.6%	-143	-5.4%
Agriculture, forestry, fisheries and mining	730	7.7%	578	5.5%	-152	-20.8%
Retail trade	1,187	12.5%	983	9.3%	-204	-17.2%
Totals	9,530	100.0%	10,584	100.0%	1,054	11.1%

Source: U.S. Census Bureau

Employment in agriculture and forestry has declined but many farms fall into the category of non-employer businesses, providing important income to their owners, although not identified as employers. Indeed, agriculture has grown in importance as an overall economic contributor (see later discussion). This is also true of many forestry and logging enterprises. Retail trade declines may also be offset to some extent by this factor and the reclassification of retail jobs associated with food as other services. Moreover, the shift from retail trade employment to other categories is generally positive, with that industry typically paying relatively low wages when compared to other sectors. Overall, one can discern a shift toward more of a service-oriented economy. Notwithstanding this, the value of the manufacturing sector to the county is enormous. It is not merely a large employer, but the largest by far and critical to the county economy.

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Employment by occupation trends are also revealing of the changing nature of Juniata County's economy, as indicated in **Table 6-2**. Although there may, once again, be some reclassification issues, the data indicates some fairly major shifts in patterns. The shift in this case is toward precision production, management, and professional occupations and away from farming, forestry, and laborer positions, recognizing employment is not the sole measure of economic strength and the agricultural economy is actually expanding (see later discussion). Overall, these are economically positive trends that indicate movement during the 1990's into capital intensive and higher-paying occupations. Other evidence suggests that trend has continued.

Table 6-2: Employed Persons 16 Years and Over by Occupation

	1990		2000		90-00 Change	
	Total	%	Total	%	Total	%
Precision production, craft, and repair occupations	1,454	15.3%	2,839	26.8%	1,385	95.3%
Managerial and professional specialty occupations	1,374	14.4%	2,443	23.1%	1,069	77.8%
Service occupations	1,136	11.9%	1,451	13.7%	315	27.7%
Technical, sales, and administrative support occupations	1,985	20.8%	2,201	20.8%	216	10.9%
Farming, forestry, and fishing occupations	718	7.5%	266	2.5%	-452	-63.0%
Operators, fabricators, and laborers	2,863	30.0%	1,384	13.1%	-1,479	-51.7%
Totals	9,530	100.0%	10,584	100.0%	1,054	11.1%

Source: U.S. Census Bureau

A third method of analyzing the Juniata County employment is by class. **Table 6-3** details how those particular patterns have evolved. Private sector for-profit wage and salaried positions have expanded more than any other category and represent over 65.8% of all gains. Private non-profit employment enjoyed the greatest proportional increase (36.9%). There has also been considerable relative growth in state and federal government employment, which is not as desirable as private sector employment in terms of the overall economy, but provides significant benefits to Juniata County.

Table 6-3: Employed Persons 16 Years and Over by Class

	1990		2000		90-00 Change	
	Total	%	Total	%	Total	%
Private for profit wage and salary workers	6,598	69.2%	7,311	69.1%	713	10.8%
Private not-for-profit wage and salary workers	510	5.4%	698	6.6%	188	36.9%
State government workers	551	5.8%	666	6.3%	115	20.9%
Self-employed workers	1,064	11.2%	1,114	10.5%	50	4.7%
Federal government workers	224	2.4%	267	2.5%	43	19.2%
Local government workers	436	4.6%	454	4.3%	18	4.1%
Unpaid family workers	147	1.5%	74	0.7%	-73	-49.7%
Totals	9,530	100.0%	10,584	100.0%	1,054	11.1%

Source: U.S. Census Bureau

Looking at the picture as a whole, Juniata County residents are finding more and higher paying jobs, although many of those jobs may well be located outside the County in places such as Harrisburg and State College. The data indicate workers are increasingly being employed as managers, professionals, and other skilled workers in more capital intensive businesses that are likely to achieve real income growth in the future if the trends can be continued.

Economic Trends

Chapter 3 *Population and Socioeconomic Analysis* also includes data on household and family incomes, poverty levels and workforce mobility. It indicates Juniata County had, in 1999, a median household income that was 86.5% of the Commonwealth's (\$34,698 compared to \$40,106). The county also had a relatively low proportion of workers finding employment in Juniata County (55.2% versus a 72.4% average for Pennsylvania as a whole). Nevertheless, the county had below average poverty levels, with only 9.5% of the county falling below these levels in 1999, compared to 11.0% of the statewide population.

Once again, however, it is the patterns over time that matter most. Income levels between 1989 and 1999 adjusted for inflation provide a good perspective, as **Table 6-4** illustrates.

Table 6-4: Incomes Adjusted for Inflation (All in 1999 \$'s)

Category	Per Capita Income	Median Household Income	Median Family Income
Juniata County			
1989	14,539	34,269	38,893
1999	16,142	34,698	39,757
Change	1,603	429	864
% Change	11.0%	1.3%	2.2%
Commonwealth of Pennsylvania			
1989	19,011	39,282	47,103
1999	20,880	40,106	49,184
Change	1,869	824	2,081
% Change	9.8%	2.1%	4.4%
United States of America			
1989	19,486	40,616	47,601
1999	21,587	41,994	50,046
Change	2,101	1,378	2,445
% Change	10.8%	3.4%	5.1%
Huntingdon County			
1989	14,150	31,361	37,577
1999	15,379	33,313	40,388
Change	1,229	1,952	2,811
% Change	8.7%	6.2%	7.5%
Mifflin County			
1989	14,336	30,781	37,165
1999	15,553	32,175	38,486
Change	1,217	1,394	1,321
% Change	8.5%	4.5%	3.6%
Perry County			
1989	16,136	39,918	44,292
1999	18,551	41,909	47,997
Change	2,415	1,991	3,705
% Change	15.0%	5.0%	8.4%

Source: U.S. Census Bureau

Juniata County gained considerable ground economically during the 1990's. Median household and median family incomes went up slightly, albeit less than either the Commonwealth or U.S. as a whole. Adjoining counties (Huntingdon, Mifflin and Perry) also did better. Nonetheless, these numbers are deceiving. Household and family sizes declined during the 1990's and a much better measure of income change, therefore, is per capita income. It went up considerably during the 1990's, by a full 11.0% in Juniata County, besting both statewide and national trends. Its per capita income gains also bested both Huntingdon and Mifflin Counties. This is an important indicator Juniata County is doing relatively well economically and catching up with the nation as a whole, even though Pennsylvania is slipping. ESRI, the demographic data service, estimates Juniata County had a per capita income of \$19,850 in 2007 (some \$15,962 in 1999 dollars, for a slight decline reflecting a recession) but projects it will reach \$22,992 in 2012 (a gain of 14.5% over 1999 in real inflation-adjusted dollars). Once again, this suggests a fairly healthy county economy.

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Employment levels remain high, which is still another such indicator of recent economic gains. Juniata County's unemployment rate in 2008 (latest full year rate available) was only 5.4%, equal to the Pennsylvania rate and below the U.S. unemployment rates. This was, however, an uptick from 1999 when the rate was measured at 5.3%, although this was then well above the statewide and national rates. Juniata does well when compared to its neighbors in Huntingdon and Mifflin Counties, although Perry County did slightly better overall, probably due to its proximity to Harrisburg.

Table 6-5: Unemployment Rates, 1999–2008

Area	1999	2008	99-08 Change
Huntingdon	7.2%	6.7%	-0.5%
Juniata	5.3%	5.4%	0.1%
Mifflin	6.5%	6.7%	0.2%
PA	4.4%	5.4%	1.0%
Perry	4.2%	5.3%	1.1%
Snyder	4.7%	6.2%	1.5%
US	4.2%	5.8%	1.6%

Source: PA Department of Labor and Industry

Poverty

Following the Office of Management and Budget (OMB) Statistical Policy Directive 14, the Census Bureau uses a set of money income thresholds that vary by family size and composition to determine who is in poverty. If a family's total income is less than the family's threshold, then that family and every individual in it is considered to be in poverty. The official poverty thresholds do not vary geographically, but they are updated for inflation using the Consumer Price Index (CPI-U). The official poverty definition uses money income before taxes and does not include capital gains or non-cash benefits (such as public housing, Medicaid, and food stamps).

Annual poverty rates from the Current Population Survey and the decennial census long form (both collected by the U.S. Census Bureau) are based on income reported at an annual figure. In the Survey of Income and Program Participation (SIPP) component of the U.S. Census, income is reported a few months at a time, several times a year. Therefore, in the SIPP, annual poverty rates are calculated using the sum of family income over the year divided by the sum of poverty thresholds that can change from month to month if one's family composition changes. **Tables 6-6 and 6-7** display poverty levels in Juniata County in 1989 and 1999, respectively.

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Table 6-6: Poverty Levels, 1989

Area	Total Population	Income in 1989 below poverty level		Under 18 years		18 to 64 years		65 years and over	
		Total	%	Total	%	Total	%	Total	%
Pennsylvania	11,881,643	1,283,629	10.80	432,227	3.64	668,307	5.62	183,095	1.54
Juniata County	20,625	1,974	9.57	643	3.12	943	4.57	388	1.88
Beale Township	629	66	10.49	22	3.50	28	4.45	16	2.54
Delaware Township	1,440	105	7.29	33	2.29	51	3.54	21	1.46
Fayette Township	3,002	210	7.00	64	2.13	128	4.26	18	0.60
Fermanagh Township	2,249	216	9.60	56	2.49	110	4.89	50	2.22
Greenwood Township	493	93	18.86	32	6.49	43	8.72	18	3.65
Lack Township	714	97	13.59	31	4.34	40	5.60	26	3.64
Mifflin Borough	660	84	12.73	31	4.70	44	6.67	9	1.36
Mifflintown Borough	866	80	9.24	32	3.70	36	4.16	12	1.39
Milford Township	1,429	60	4.20	17	1.19	23	1.61	20	1.40
Monroe Township	1,800	178	9.89	76	4.22	69	3.83	33	1.83
Port Royal Borough	836	70	8.37	16	1.91	21	2.51	33	3.95
Spruce Hill Township	694	118	17.00	66	9.51	48	6.92	4	0.58
Susquehanna Township	1,022	57	5.58	11	1.08	31	3.03	15	1.47
Thompsontown Borough	582	73	12.54	10	1.72	30	5.15	33	5.67
Turbett Township	779	75	9.63	31	3.98	33	4.24	11	1.41
Tuscarora Township	1,099	144	13.10	26	2.37	83	7.55	35	3.18
Walker Township	2,331	248	10.64	89	3.82	125	5.36	34	1.46

Source: U.S. Census Bureau

Table 6-7: Poverty Levels, 1999

Area	Total Population	Income in 1999 below poverty level		Under 18 Years		18 to 64 years		65 Years and Over	
		Total	%	Total	%	Total	%	Total	%
Pennsylvania	11,879,950	1,304,117	10.98	421,745	3.55	718,277	6.05	164,095	1.38
Juniata County	22,314	2,109	9.45	688	3.08	1,173	5.26	248	1.11
Beale Township	734	54	7.36	21	2.86	32	4.36	1	0.14
Delaware Township	1,450	107	7.38	42	2.90	58	4.00	7	0.48
Fayette Township	3,244	308	9.49	96	2.96	188	5.80	24	0.74
Fermanagh Township	2,372	211	8.90	66	2.78	119	5.02	26	1.10
Greenwood Township	558	39	6.99	7	1.25	28	5.02	4	0.72
Lack Township	746	111	14.88	44	5.90	57	7.64	10	1.34
Mifflin Borough	593	104	17.54	47	7.93	54	9.11	3	0.51
Mifflintown Borough	826	113	13.68	41	4.96	54	6.54	18	2.18
Milford Township	1,734	133	7.67	30	1.73	85	4.90	18	1.04
Monroe Township	1,981	155	7.82	51	2.57	77	3.89	27	1.36
Port Royal Borough	972	97	9.98	27	2.78	60	6.17	10	1.03
Spruce Hill Township	702	68	9.69	14	1.99	50	7.12	4	0.57
Susquehanna Township	1,136	85	7.48	34	2.99	40	3.52	11	0.97
Thompsontown Borough	704	53	7.53	9	1.28	22	3.13	22	3.13
Turbett Township	808	71	8.79	21	2.60	25	3.09	25	3.09
Tuscarora Township	1,161	150	12.92	46	3.96	87	7.49	17	1.46
Walker Township	2,593	250	9.64	92	3.55	137	5.28	21	0.81

Source: U.S. Census Bureau

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County Statistics and Trends

- Overall, poverty rates for Juniata County changed little from 1989 to 1999. The county saw only a slight decrease in the percentage of those living below the poverty level.
- Poverty levels have experienced little change as the county’s population increased from 20,625 persons in 1990 to 22,314 persons in 2000.
- The 65 years and older age group had the lowest poverty rate of any other age group in Juniata County. The poverty rate for this group decreased between 1989 (1.88%) to 1999 (1.11%).

Municipal Statistics and Trends

- Greenwood Township saw the greatest decline in poverty levels from 1989 to 1999. The levels from 1989 to 1999 decreased from 18.86% to 6.99%, respectively. In 1999, Greenwood Township also had the lowest poverty rate of any municipality in the county. The reasons for this improvement are not clear from the data but are probably related to general improvement in economic conditions within the county.
- In 1999, Mifflin Borough had the highest rate of poverty of any municipality in the county. The poverty rate for Mifflin Borough increased between 1989 and 1999 from 12.73% to 17.54%, respectively. Reasons for this increase are not clear.

Major Industries

Juniata County’s major industries, in terms of businesses located within the county and not simply employing county residents, encompassed the following categories of employers in 2005 (latest data available):

Table 6-8: Juniata County Business Patterns, 2006

Industry Description	2006 Total Establishments	2006 Total Employees	2006 Annual Payroll
Manufacturing	54	2,116	\$59,755,000
Transportation and warehousing	32	590	\$17,161,000
Retail trade	79	821	\$14,241,000
Construction	71	358	\$12,407,000
Health care and social assistance	33	570	\$11,565,000
Finance & insurance	25	243	\$6,382,000
Other services (except public administration)	70	321	\$5,815,000
Accommodation & food services	27	405	\$3,307,000
Information	8	63	\$1,716,000
Professional, scientific and technical services	21	60	\$865,000
Educational services	6	82	\$671,000
Other (wholesale, real estate, agriculture, etc.)	51	492	\$15,913,000
Totals	477	6,121	\$149,798,000

Source: U.S. Census Bureau

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Manufacturing is even more important when viewed from this perspective. It accounts for 34.6% of all jobs located within Juniata County and 39.9% of all payroll generated by these employers. Manufacturing, by contrast, represented 23.3% of Huntingdon County jobs, 29.1% of those in Mifflin County and only 13.3% of Perry County employment. Distribution enterprises (transportation and warehousing) rank third in employment and account for another 9.6% of jobs and 11.5% of payroll, much higher than these other counties where this sector failed to make the list of top three job creating industries. These numbers illustrate how important U.S. Route 322 and the industrial park located at its intersection with Pennsylvania Route 35 are to the Juniata County economy. They are its very foundation. The largest employer in Juniata County is Empire Kosher Poultry (about 1,100 employees). Other large employers identified by the Pennsylvania Department of Labor and Industry include Armstrong Cabinet Products, Brookline Manor, Family House Restaurant, Jay Fulkroad & Sons, Juniata County, Stop 35, Weis Markets and Zimmerman Truck Lines.

There are also numerous examples of what the Census Bureau describes as “self-employed individuals operating very small unincorporated businesses, which may or may not be the owner's principal source of income.” Data on these businesses is collected in the form of “nonemployer” statistics. Included is information on the number of establishments and sales or receipts of businesses without paid employees that are subject to federal income tax. **Table 6-9** summarizes this information.

Table 6-9: Juniata County Nonemployer Statistics, 2006

Nonemployer Description	Total Establishments	Annual Receipts
Construction	277	\$16,928,000
Transportation and warehousing	168	\$14,499,000
Retail trade	252	\$11,764,000
Other services (except public administration)	305	\$7,878,000
Real estate and rental and leasing	115	\$5,643,000
Manufacturing	77	\$5,064,000
Forestry, fishing, hunting and agricultural support services	95	\$6,227,000
Wholesale trade	32	\$2,350,000
Professional, scientific, and technical services	108	\$2,490
Health care and social assistance	98	\$1,348,000
Administrative and support and waste management and remediation service	101	\$1,457,000
Finance and insurance	27	\$800,000
Arts, entertainment, and recreation	51	\$709,000
Accommodation and food services	30	\$697,000
Information	10	\$204,000
Other nonemployer businesses	15	\$2,706,510
Totals	1,761	\$78,277,000

Source: U.S. Census Bureau

These non-employer businesses generated sales of \$78.3 million in 2006. Juniata County businesses as a whole generated between \$500 and \$600 million of sales receipts according to the 2002 Economic Census, suggesting non-employers represent approximately 10-12% of the total county economy today. Contractors, truckers, small retailers and various services are among the principal non-employers.

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There are also some individual Census reports on various industry sectors that provide further insights into the local economy. The 2002 Census of Manufacturing, for example, provides the data contained in **Table 6-10** on Juniata County manufacturers as of that date:

Table 6-10: Juniata County Manufacturing Statistics, 2002

Description	Measure of Performance
Total Manufacturing Establishments	51
Manufacturing Establishments with 20+ employees	14
Total Manufacturing Employees	2,153
Total Manufacturing Payroll	\$61,070,000
Total Manufacturing Value Added	\$157,014,000
Total Manufacturing Annual Value in Shipments	\$315,438,000
Total Manufacturing Capital Added	\$3,510,000

This data indicates manufacturing accounts for as much as one-half or even more of the Juniata County economy in terms of sales and value added.

The Census of Retail Trade provides further data, results of which are summarized in **Table 6-11**.

Table 6-11: Juniata County Retail Statistics, 2002

Factor	Automobile Retail	Gasoline Retail	Food & Beverage Retail	Other Retail	Total Retail
Establishments	15	12	14	39	80
Employees	190	216	184	180	770
Payroll	\$5,436,000	\$2,718,000	\$2,283,000	\$2,951,000	\$13,388,000
Sales	\$78,807,000	\$29,370,000	\$24,164,000	\$46,243,000	\$178,584,000

The trade data illustrates most of the county’s retail business is oriented toward travel-related activities from vehicle sales, to gasoline service stations and convenience stores. These uses dominate over conventional retail categories, indicating much shopping for other goods and services takes place outside of the county. Wholesale trade data, indicating durable goods wholesaling, constitutes the bulk of this industry sector and is detailed in **Table 6-12** following.

Table 6-12: Juniata County Wholesale Statistics, 2002

Factor	Durable Goods Wholesale	Non-Durable Goods Wholesale	Total Wholesale
Establishments	13	4	17
Employees	139	37	176
Payroll	\$5,516,000	\$371,000	\$5,887,000
Sales	\$57,433,000	\$2,642,000	\$60,075,000

Table 6-13: Juniata County Other Industry Sector Statistics, 2002

Factor	Lodging & Food Service	Health Care and Related	Other Services	Professional, Scientific & Technical	Total Retail
Establishments	30	33	40	22	125
Employees	362	750	204	61	1377
Payroll	\$2,332,000	\$13,932,000	\$2,874,000	\$1,332,000	\$20,470,000
Sales	\$8,150,000	\$29,092,000	\$10,182,000	\$5,359,000	\$52,783,000

Data found in **Table 6-13** above also illustrates the importance of the health care industry to the Juniata County economy. It was a \$29 million industry in 2002, the largest share of which constituted nursing home and residential care facilities.

Competitive Position of Juniata County

Juniata County, like every other jurisdiction, must compete for economic development. This can only be accomplished effectively by documenting and promoting the county’s marketable comparative advantages. Many of those advantages have to do with quality of life issues and natural or geographic factors discussed elsewhere in this comprehensive plan. Others are economic in nature. Among the marketable comparative advantages of Juniata County are the following:

- Excellent highway access provided by four-lane U.S. 22/322.
- A large existing high-quality industrial park that takes good advantage of highway access.
- An appealing living environment for workers.
- Easy access to Harrisburg, as well as State College, for technical expertise, cultural events and support services.
- A growing labor force of potential workers, underemployed members of which can be tapped by industries that are finding it difficult to secure employees.
- An average comparative wage advantage of nearly 24.6% as **Table 6-14** demonstrates.

While lower than average wages are sometimes viewed as a negative, they can also be turned to a highly positive economic marketing advantage, particularly in an area with a growing labor force, such as Juniata County. Businesses seeking a steady growing supply of reasonably priced workers are likely to find them in Juniata County and can, for this reason, often be attracted to the county with appropriate marketing. Securing the workers, however, will demand such business pay a premium over existing wages that serves to increase average wages for the county but still affords the employer a comparative advantage. Marketing of this comparative advantage (the measurable advantages Juniata County possesses compared to competitive areas) thereby strengthens the economy even as it promotes the availability of a lower cost labor supply.

Table 6-14: Juniata Occupational Wage Statistics, 2006

Occupation	County Average Annual Wage	PA Average Annual Wage	Juniata Comparative Wage Advantage	Juniata County Percent Advantage
Life, Physical, and Social Science Occupations	\$19,600	\$55,959	\$36,359	65.0%
Legal Occupations	\$27,389	\$75,154	\$47,765	63.6%
Architecture and Engineering Occupations	\$33,926	\$63,441	\$29,515	46.5%
Business and Financial Operations Occupations	\$31,818	\$57,294	\$25,476	44.5%
Healthcare Practitioners and Technical Occupations	\$34,283	\$58,611	\$24,328	41.5%
Management Occupations	\$52,233	\$86,968	\$34,735	39.9%
Arts, Design, Entertainment, Sports, and Media Occupations	\$25,050	\$39,976	\$14,926	37.3%
Construction and Extraction Occupations	\$31,048	\$40,869	\$9,821	24.0%
Personal Care and Service Occupations	\$16,398	\$21,469	\$5,071	23.6%
Healthcare Support Occupations	\$18,424	\$24,076	\$5,652	23.5%
Office and Administrative Support Occupations	\$22,578	\$29,171	\$6,593	22.6%
Community and Social Services Occupations	\$28,056	\$35,434	\$7,378	20.8%
Installation, Maintenance, and Repair Occupations	\$32,035	\$38,181	\$6,146	16.1%
Sales and Related Occupations	\$28,985	\$33,599	\$4,614	13.7%
Production Occupations	\$28,164	\$31,628	\$3,464	11.0%
Food Preparation and Serving Related Occupations	\$17,160	\$17,804	\$644	3.6%
Protective Service Occupations	\$35,535	\$36,502	\$967	2.6%
Building and Grounds Cleaning and Maintenance Occupations	\$22,283	\$22,833	\$550	2.4%
Transportation and Material Moving Occupations	\$31,581	\$29,013	(\$2,568)	-8.9%
Farming, Fishing, and Forestry Occupations	\$28,866	\$24,530	(\$4,336)	-17.7%
Total – All Occupations	\$28,320	\$37,580	\$9,260	24.6%

Source: PA Center for Workforce Information and Analysis, *May 2006 Occupational Employment Statistics Survey*

Agriculture Industry

Farming is a major industry within Juniata County, generating some \$91.7 million of sales in 2007, up from \$67.6 million in 2002, according to the U.S. Census of Agriculture for those years. The average farm sold almost \$105,000 of product in 2007 and had roughly \$644,000 invested in land, buildings, machinery and equipment, making agriculture a remarkably important industry to the county. **Table 6-14** highlights key aspects of this industry, which is heavily oriented toward livestock and poultry sectors (\$83.3 million of sales in 2007), with an unusual amount of diversity in the types of farms. There are beef, dairy, hog, sheep and poultry operations in significant numbers throughout the county. Crop farming also takes place and is significant compared to many other counties, although the \$8,3 million in sales is dwarfed by livestock and poultry sales in Juniata County.

Net farm income for the county as a whole was \$25.7 million in 2007, up from \$21.6 million in 2002, or \$32,675 per farm, with 361 or 45.8% of all farmers considering this their primary occupation. The average farm is 124 acres in size (down from 134 in 2007 and indicating some additional diversification). Altogether, the agriculture industry represents a \$508 million investment in Juniata County, and it is growing.

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Table 6-15: Juniata County Agricultural Statistics, 2007

Agricultural Characteristic	Measure
Farms	788
Land in farms	97,681
Average size of farm	124
Average estimated market value of land and buildings per farm	\$571,345
Average estimated market value of all machinery and equipment per farm	\$72,986
Farms by size - 1 to 9 acres	69
Farms by size - 10 to 49 acres	262
Farms by size - 50 to 179 acres	292
Farms by size - 180 to 499 acres	143
Farms by size - 500 acres or more	13
Crop farms	671
Total acres of cropland	59,074
Total acres of harvested cropland	47,857
Total market value of agricultural products sold	\$91,658,000
Total market value of crops sold	\$8,321,000
Total market value of livestock, poultry and related products sold	\$83,338,000
Average market value of agricultural products sold per farm	\$104,999
Farms by value of sales - Less than \$2,500	305
Farms by value of sales - \$2,500 to \$4,999	54
Farms by value of sales - \$5,000 to \$9,999	79
Farms by value of sales - \$10,000 to \$24,999	74
Farms by value of sales - \$25,000 to \$49,999	51
Farms by value of sales - \$50,000 to \$99,999	38
Farms by value of sales - \$100,000 or more	187
Net cash farm income	\$25,748,000
Average net cash farm income	\$32,675
Farms where farming is primary occupation of principal	361
Cattle and calves farms	329
Cattle and calves inventory	19,282
Beef cows farms	125
Beef cows inventory	1,393
Dairy farms	146
Dairy cow inventory	8,200
Hog farms	49
Hogs and pigs inventory	34,940
Sheep farms	31
Sheep and lambs inventory	1,754
Poultry farms (layers)	109
Poultry inventory (layers 20 weeks old and older)	241,345
Broilers and other meat-type chicken farms	57
Broilers and other meat-type chickens sold	11,873,576
Corn for grain farms	281
Corn for grain acres	11,909
Corn for silage or greenchop farms	168
Corn for silage or greenchop acres	7,312
Wheat for grain farms	58
Wheat for grain acres	965
Oats for grain farms	90
Oats for grain acres	1,102
Soybeans for beans farms	155
Soybeans for beans acres	7,554
Forage - land used for all hay and all haylage, grass silage, and greenchop, farms	409
Forage - land used for all hay and all haylage, grass silage, and greenchop, acres	18,930

Source: U.S. Census of Agriculture, 2002

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Tourism Industry

Tourism has become a significant industry within Juniata County. The importance of this industry and its growth potential is discussed in detail in the *Juniata Valley Regional Tourism Plan* (available on the county websites). There is a two-county Juniata River Valley Visitors' Bureau whose activities on behalf of the industry are supported by a 3% room tax enacted by the counties. This tax supports approximately 85% of the Visitors' Bureau budget. The Bureau has also made new affiliations to help drive its program, associating with the Alleghenies Tourism Council, for example, to assist their efforts. The Pennsylvania Department of Community and Economic Development periodically examines the economic impact of such tourism on counties within the commonwealth. Data from their 2003 (latest) report is shown in **Table 6-16**.

Table 6-16: Juniata County Tourism Statistics, 2002-2003

Tourism Spending Category	2002	2003	2002-03 Change	2002-03 Change %
Transportation	\$230,000	\$240,000	\$10,000	4.3%
Food and Beverage	\$3,420,000	\$3,610,000	\$190,000	5.6%
Lodging	\$440,000	\$510,000	\$70,000	15.9%
Shopping	\$490,000	\$510,000	\$20,000	4.1%
Entertainment	\$1,180,000	\$1,280,000	\$100,000	8.5%
Other	\$730,000	\$750,000	\$20,000	2.7%
Total	\$6,490,000	\$6,900,000	\$410,000	6.3%
% of Total County Economy	0.5%	0.5%	N/A	N/A

Source: Pennsylvania Tourism Office, 2003

The data indicate the primary tourism impacts are on food and beverage purchases, with large secondary impacts on entertainment expenditures (which can include outdoor recreation activities). While tourism is still a small industry within the county it also exhibits many growth opportunities. Moreover, as the above table illustrates, the multiplier effects on other industry sectors are widespread.

Economic Development Recommendations

The following are major recommendations for economic development of Juniata County. These complement actions set out in the *Goals and Objectives* section of this plan.

Marketing and Public Relations

Juniata County possesses certain marketable competitive advantages over other Northeast and U.S. locations. A marketing campaign focused on quantifiable illustrations of these advantages (as opposed to generic broad brush solicitations) should be fashioned and implemented within the framework of regional promotion strategies. While it is crucial Juniata County's distinctive assets not be obscured by such regional strategies, a cooperative campaign will allow the county to take advantage of the additional resources available at that level.

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Regional partnerships focused on particular needs or opportunities (such as the one with the Alleghenies Tourism Council) will ensure the capacity to document additional comparative advantages. Industry specific studies might demonstrate, for instance, why Central Pennsylvania is the place to be for machinery manufacturers. This data can be used as a foundation to then focus on Juniata's highway access, industrial sites and skilled labor force as one of the specific places such a specific industrial prospect should consider.

Marketing should incorporate an internet presence built upon a Juniata County website linked to regional programs, economic development agencies and technical assistance sources. Cooperation with Mifflin and Perry Counties is particularly important. Much can be accomplished at low cost if the county focuses on public relations as opposed to conventional advertising campaigns. Relentless weekly promotion of the county using its website and news releases regarding county initiatives, advantages and developments can be used to reach into Harrisburg and State College markets, as well as others, and draw new attention to the county. This should be a designated responsibility of someone in county government or an associated agency.

These efforts should be focused not merely on economic opportunities but the quality of place the county offers as a choice of residence. The county needs to grow and specifically needs new families if it is to continue to support its educational and other infrastructure and services. Only such growth will provide the labor force needed to attract business and industry, create wealth and improve the quality of life for all residents.

The county and regional efforts should also, of course, utilize traditional techniques of multiple exposure contacts to create "top of mind awareness" and target corporate officers with personal interests in the county or region. The county should be marketed, both internally and externally, using consistent themes that join together the efforts of the multiple entities with responsibility for the economic development of the county and region. The "Discover Our Good Nature" tourism theme employed by Mifflin and Juniata Counties will help to promote general business development but needs to be linked to a regional brand image to be truly effective.

Business Friendly Land Use Regulation

The county should lead the way in developing model land use regulations that are user friendly for agricultural development, downtown revitalization and industrial business retention and expansion. The county should leave land use regulation to its boroughs and townships but develop models that can be used by these municipalities to protect the public health and safety while also allowing maximum flexibility for business and industry. Farm stands, for example, should be anticipated as an appropriate accessory use in most areas with only minimal regulation to ensure off-site parking.

Agricultural entities should also be permitted to engage in certain manufacturing (e.g., wine-making, dairy processing) and retail activities (e.g., wine shops, craft shops, farm markets). The county should consider developing an *Agricultural Planning Guide* that would help municipalities understand the need for such provisions and evaluate their ordinances for "farm friendliness."

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Likewise, boroughs should be encouraged to relax parking requirements in downtown areas and encourage housing in upper stories of buildings to create downtown activity. Increasing density within centers is also recommended in most instances as a way to strengthen the economy of these communities. Expansion of existing nonconforming structures and uses should also be evaluated on their merits rather than arbitrarily limited, with flexibility to be innovative in addressing issues such as parking and signage. Additions and expansions of businesses and industrial enterprises, particularly those of an accessory nature, should be made as easy as possible, rather than forcing them through long or complex procedures. These initiatives should be complemented by downtown revitalization projects in Mifflin, Mifflintown, Port Royal and/or Thompsettown. The county should consider working with the Pennsylvania Downtown Center and Pennsylvania Department of Community and Economic Development to create a shared main street manager program for these communities to support more downtown activities, new development downtown, facade restorations and other incentives. Consideration should also be given to creating a Business Improvement District (BID) in one or more instances that would take advantage of the Commonwealth's Neighborhood Improvement District Act to create, with the approval of affected businesses, special taxing districts that would support these programs.

All land use regulations should be as performance oriented as possible with as little arbitrariness as is practical. Rather than regulate development on slopes, for example, to control erosion and sedimentation, the emphasis should be on storm water management itself with criteria that encourage actual reduction of impacts while allowing design flexibility.

Notwithstanding the above recommendations, there are four municipalities without subdivision and land development regulations. These communities should consider adopt a model subdivision and land development ordinance developed through the county as a means of ensuring land development is not undertaken in a careless manner that threatens the economic attractiveness of the area. If such municipalities without regulations are not interested in adopting them on their own yet the county should consider adopting an ordinance that would establish basic land development procedures that would be automatically repealed as municipalities developed capacity and later took over the process.

Manufacturing Diversification

The county needs to continue to develop or recruit new businesses that will serve to diversify its manufacturing base. Juniata County has a high level of manufacturing employment that needs to remain a priority. The manufacturing labor force in the county and in adjoining Mifflin County is also an important asset for attracting other manufacturing businesses requiring such skills. The value of diversification is, nonetheless, self-evident. Too much dependence on one sector or sub-sector makes it difficult to weather recessions. While all rural counties tend to recover more slowly than urban centers, heavy dependence on manufacturing can accentuate negative effects on employment, this sector typically being one of the first to experience slowdown.

Smaller manufacturing enterprises that demand craftsman positions (e.g. tool and die, small metal fabrication), and whose owners are likely to find Juniata County an attractive place to live due to its outdoor recreation and lifestyle, are also good candidates. There are numerous other

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examples, of course, but the primary need is a targeted approach to business recruitment that tackles opportunities beyond simply attracting larger manufacturing enterprises. Recruitment efforts should be directed at smaller manufacturing companies found throughout the East Coast metropolitan areas who would benefit from Juniata's labor force, quality of place and proximity to Penn State and the State Capitol. Other prime prospects include manufacturers and service providers typically clustered around the types of manufacturing enterprises Juniata County already possesses.

Tourism Development

The *Juniata River Valley Regional Tourism Plan* sets out several recommendations for development of the industry that have been implemented in several respects. This plan describes the Juniata River Valley as "a region of attractive historical and natural resources" with "a blend of history, working landscapes and spectacular features that offers visitors relaxing, yet intriguing, experiences." It proposes tourism development and promotion focused on heritage and natural resources based tourism.

Major goals of the *Regional Tourism Plan* include developing of a Juniata River Valley brand image and coordinating of all tourism promotion activities within the Juniata River Valley, to buttress the brand image and leverage investments in advertising and marketing. Specific recommendations include; a) maintenance of an interactive website tourism map, b) a themed advertising program targeted at major markets, c) a website development program for Juniata River Valley Visitors Bureau members, d) a travel packaging program, e) a travel media information program, f) promotion of agricultural tourism ventures, g) trail and tour development, h) downtown revitalization, and i) gateway improvements. The county should continue to implement these recommendations as a means of strengthening the tourism sector and increasing its contributions to the local economy.

The Bureau has developed an excellent website and promotional program, along with accompanying brochures. It is well on its way to implementing the Tourism Plan and should simply continue its efforts along this line. The website can be further developed to embellish links with individual tourism businesses and allow more reservation activity through it on-line. The more interactive the site, the better. Likewise, the more the site interacts with private websites, the more results it will yield in the form of increased business.

Business Retention and Expansion

Retaining and expanding existing businesses is one of the most productive means of conducting economic development. This requires working closely with existing businesses to identify specific employment training, infrastructure and service needs and responding to these needs in cooperation with local economic and workforce development organizations. The county should give a high priority to these endeavors. It should, moreover, require coordination among providers of these services to ensure there are minimal gaps and redundancies.

The county also needs to promote the availability of existing financial incentives that might benefit existing businesses. Among these are industrial development incentives offered by the

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Pennsylvania Industrial Development Authority, regional economic development programs, Pennsylvania Department of Community and Economic Development programs, Small Business Administration loans and Community Development Block Grant assistance. Materials summarizing these programs, their requirements and their applicability to individual business needs should be crafted and made available to existing businesses in both hard copy and website versions. The county should also, in cooperation with other counties in the region, pursue the development of micro-loan programs for new agricultural and small business ventures. Finally, the county should market its existing Keystone Opportunity Zone (KOZ) as a tool to attract additional business and expansions to the industrial park.

The Juniata-Mifflin Area Vocational Technical School can assist in this effort through the offering of additional training opportunities for existing businesses as well as prospective new industries. Tailoring of programs to the needs of local enterprises is essential and should continue. A proposed community college that both the School District and County Commissioners have agreed to financially support could provide similar opportunities and should be further developed.

Agricultural Development

It is recommended the county work with Penn State Cooperative Extension to identify and promote niche agricultural opportunities with significant income potential. Recommended techniques to accomplish this include development of an *Agricultural Business Planning Handbook* for new farm ventures, designed to provide Juniata County farmers and other potential entrepreneurs with a step by step approach to developing a business plan for their prospective venture, including sample materials and guidance with respect to on-going management.

It is further recommended the county develop a *Financial Assistance for New Agricultural Entrepreneurs* brochure that identifies funding for new agricultural ventures, and promote the First Industries Agriculture Loan Program and other micro-loans for agricultural ventures administered by SEDA-COG. It also suggested the county consider working with Penn State Cooperative Extension to develop selective model *Business Plans* for different agri-ventures practical for Juniata County farmers to pursue (e.g., farm winery, produce market, corn maze attraction). These model plans should each include all the elements of a proper business plan, including pro forma financials, cash flow analyses, labor management elements and marketing recommendations. Such models have already been developed for other rural communities in several instances and can be easily modified for use in Juniata County.