

Executive Summary

This report delivers regional analysis of the North Country consisting of Clinton, Essex, Franklin, Lewis, Jefferson, and St. Lawrence counties. The report evaluates the employment base, competitive industries and projected employment growth opportunities in the area. A summary of the main findings is presented below:

Employment and Wages

- Employment (141,674) in the region accounts for 1.9% of New York State's private sector employment (7,122,485).
- Average private sector wages (\$30,868) in the region are 50% lower than the state's average of \$61,402.
- Clinton, Jefferson, and St. Lawrence counties account for 76% of the region's private sector employment.
- Clinton and St. Lawrence counties' private sector average wages (\$33,130 and \$31,184 respectively) are above the regional average.

Interstate Business Movers

- The region lost 278 establishments between 1990 and 2004.
- The largest net loss was from establishments that moved to Florida.
- A total of 266 establishments moved to the region between 1990 and 2004.
- The largest net gain of businesses was from Vermont.

- Manufacturing industries accounted for the largest share of net moves in the region.
- The largest net loss was observed in Administrative and Support Services, Food Services and Drinking Places, Accommodation and Repair and Maintenance.

Population and Age Demographics

- Employment growth in Franklin (5.7%) and Jefferson (7.4%) counties exceeded the state's employment growth rate of 3.9%.
- Clinton and Essex counties are the only two counties in the region to have negative employment growth.
- Jefferson County had the largest population growth (3.1%) of all New York State counties.
- Essex and St. Lawrence counties had population declines between 2004 and 2007.

Competitive Industries

- The region has 28 industries that met at least one of three competitiveness criteria¹.
- Of the 28 competitive industries, 11 are projected to grow by 2016.
- All 11 industries are projected to grow faster than the region average of -8%.

¹ The competitive criteria used in the analysis are: location quotient greater than or equal to 1.25, relative average wage greater than 100% and differential employment growth rate greater than or equal to 20%.

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Introduction

The purpose of this report is to deliver a regional analysis of the North Country consisting of Clinton, Essex, Franklin, Lewis, Jefferson, and St. Lawrence counties. The report evaluates the employment base, competitive industries and projected employment growth opportunities in the area.

The report will be able to provide answers to questions such as: Who are the important employers in the region and who contributes most to the region's growth? What businesses are likely to move within the region? What kinds of occupations will be in demand?

The report has four main sections. Section one describes the data used in the analysis as well as the methodology applied throughout. Section two presents a general overview of the regional economy. The overview covers employment, wages, population growth, business relocations and age demographics by industry. Section three identifies the region's competitive advantage. Sectors with strong regional specialization and potential for future development are selected based on three competitive criteria. Section four looks at the opportunities for employment growth across industries. Projections for future growth by industry are developed. Tables with detailed information about businesses relocating to and out of the region are provided in Appendices.

Section 1: Data Sources and Methodology

1.1 Data: The National Establishment Time-Series Database

1.1.1 Overview

The data set used in the study is the National Establishment Time Series (NETS). The NETS is a longitudinal data created by Walls & Associates from the original Dun & Bradstreet (D&B) cross-section files of the Data Universal Numbering System (DUNS) marketing information. The D&B files collection is an on-going effort to capture every business establishment in the United States in each year. The main target of this data collection is the business community. A set of indicators, such as D&B Ratings and PayDex scores, are calculated to provide a useful tool in the process of decision-making.

The files with marketing information are assembled through the collection of data from many different sources: telephone calls, court filings, newspapers and electronic news, payment information, company filings and reports, government registries, licensing data, public utilities, the US Secretaries of State and the US Postal Service. Using DUNS, D&B assigns a 9-digit identification sequence to every establishment in the data. Since 1990 the DUNS has been adopted by many government agencies in the US and has become internationally recognized.

This study uses an extract from the NETS covering all business establishments that were ever located in the North Country (Franklin, Essex, Clinton, Jefferson, Lewis and Saint Lawrence counties) between 1990 and 2004 and their headquarters, regardless of the location.

The unit of observation is a business establishment. Establishment is defined as an entity or business at a single physical location. It is often the case that firms own more than one establishment that might be located in different geographical areas and operate in different industries. The NETS data indicates whether an establishment is a stand-alone firm or a branch of a multi-establishment firm. Most of the establishments, however, are stand-alone firms.

The NETS data includes the following variables:

- Current business name;
- Current establishment location (zip codes including the 4-digit extension);
- FIPS county codes in each year;
- Type of location (single location, headquarters, branch) in each year;
- Employment in each year;
- SIC/NAICS codes at the 8-digit level in each year;
- In case the establishment moved, the NETS provides: the year of movement, origin zip code, origin city, origin state, destination zip code, destination city, destination state.

1.1.2 Advantages of the NETS

The NETS has several beneficial characteristics, one of which is the fact that the data covers the whole universe of establishments. Over the period 1990-2004, the database includes annual information on 15 to 20 thousand establishments in the North Country providing about 100 to 100 thousand jobs. A total of 11,815 establishments are covered in the 1990-2004 North Country extract from the NETS.

There was a change in the data collection process in 1991. After a federal court ruling allowed regional Bell companies to sell information collected by them, D&B expanded its database by using the telephone directory to identify businesses. Neumark et al. (2005 & 2006) report that this change resulted in a significant increase in the number of establishments and jobs at the NETS, and that for the period after 1991 the data sets reported considerably more very small establishments compared to other data sources. Even though Neumark et al. (2006 & 2005) choose to drop the 1990-1991 data, for the purpose of my analysis I include these two years. A comparison of data from the 1990-1991 period and the rest of the data shows that there is no significant difference in terms of the number of establishments observed. In addition, the nature of the typical establishment in the North Country differs from that in California. Characteristically, the North Country is populated with a small number of large establishments and a significant number of small establishments.

One additional property of the NETS is that the database provides complete information on business relocation. As Neumark et al. (2006 & 2005) underline, there are other data sources that have been used in studies of employment dynamics². The NETS database, however, tracks business address changes and identifies business moves over time within the entire country.

1.1.3 Relocations, Births, and Deaths

In recording relocation of an establishment that existed previously versus a new establishment, the DUNS number plays a significant role. DUNS numbers are unique and never recycled. If one establishment closes, its DUNS number is stored under “inactive” or “out of business.” The same DUNS number can be reassigned only if the establishment reopens. Every time there is an update of the establishments’ database, D&B contact the last recorded address, or headquarters in case an establishment is a part of a multi-unit firm. If a new establishment has been founded and investigation shows that there is no previous record, a new DUNS number is assigned. This systematic procedure allows for differentiation between relocations, birth and deaths.

² Some of the most popular among researchers are the Census of Manufacturers, the Longitudinal Research Database, and the Unemployment Insurance Data. There are also some newer data sets based on Census and Bureau of Labor Statistics data.

An establishment that relocates is identified by street address and zip code changes from one year to another. The data includes both establishments that moved to the North Country and establishments that moved out of the North Country. There are two limitations as to what information can be extracted from this form of relocation (Newmark, 2006). The first limitation refers to the difference between moving out and branching out. Moving out occurs when a company located in the North Country moves out of the area. This company will be in the NETS. However, when a company located in the North Country decides to open an establishment out of the North Country area, a process called branching out, this new establishment will not be registered in the data. The main presumption is that opening a new establishment in the North Country area will occur at a different cost than opening the same establishment outside of the area.

The second limitation has to do with the type of relocation. The NETS data follows only physical relocations. There are, however, some other types of relocations that might occur. If a job position is moved from one location of a firm to another location of the same firm, this type of relocation will be observed as a decrease in employment in the first location and increase of employment in the second. Also, when activities from different locations are consolidated and moved to a single location, this change will be observed as a process of growing of one establishment and closing of another.

1.1.4 Data Assessment

The NETS data had been thoroughly examined in Neumark et al. (2005) studying employment change in California. They provide a detailed investigation of the quality, reliability and potential limitations of the data, concluding that the NETS is a reliable source of information about the process of employment change.

1.2 Methodology

1.2.1 Regional Indicators

The overview of the regional economy, presented in section two, relies on three main groups of indicators. The first group of indicators encompasses private sector business establishments, employment and average wages. The indicators are reviewed by county. Employment growth trends are observed. The purpose of this group of indicators is to give a general idea of the strength of the North Country region in attracting and retaining employment.

The second group of indicators observes the trends in business relocations to and out of the region. Net gains and losses of business establishments by industry are presented. States where establishments move from when coming to the region, as well as states where establishments move to when leaving the region are listed. This helps determine the local potential for attracting employment and businesses from out of the area.

Population growth trends and share of retirement age workers are presented by industry in the last set of indicators. Declining population, coupled with larger shares of retirees might bring challenges to a region already under strain from losing jobs due to businesses leaving the area.

1.2.2 Competitive Industry Indicators

This section presents a group of three indicators used to determine which industries are at competitive advantage for the local economy. These indicators are location quotient, relative average wage and differential employment growth.

The first competitive indicator is the concentration of industry employment in the area as measured by location quotients. Location quotient is calculated as a ratio of the regional employment concentration in a particular industry and the state employment concentration of that same industry. A Location quotient of one indicates that the industry employment shares in the region and in the state are the same. The threshold for the location quotients is 1.25 for an industry to have a competitive advantage. Such an industry has a 25% greater share in the region as compared to the state as a whole.

The second indicator is relative average wage. The average regional annual wage is compared with the state annual wage. The comparisons are done by industry. The threshold is 100%. If the regional relative average wage

for an industry is more than 100%, this means that the wage paid locally is higher than the wage paid by the state. Industries paying average wages higher than the state levels are at competitive advantage. Businesses paying higher wages reflect higher productivity and workers skill set, as well as human capital accumulation.

Differential employment growth is the last indicator of the group. Employment growth rates are calculated over a five-year period for the region and for state-wide. These calculations are done by industry. The two growth rates, regional and state, are then compared by industry. The threshold is 20%. What this means is that a local industry with a differential employment rate of 20% grew 20% faster in the region than in the state as a whole. An industry which performs better locally than on a national level, indicates the existence of a competitive advantage in the region.

1.2.3 Employment Growth Projections

The employment growth projections provided in section four are based on data from the New York State Department of Labor and the NETS. Future employment has been projected for 2016 for each of the competitive industries identified in section three. The employment growth projection is for the period 2007-2016. Employment projections help determine a path for future development in the area.

1.3 Limitations

The analysis provided here is based on data from different data sets. While the bulk of the study is done with data from the NETS, some of the results have been produced using data series from the New York State Department of Labor and US Census Bureau. While results should be very similar, using different data sets might produce some occasional misalignment. For example, the regional overview in section two and the employment growth projections in section four include Hamilton County, while the rest of the results in the report, based on the NETS, exclude this county.

Section 2: Overview of the Regional Economy

Business Establishments, Employment and Wages

- The region, made up of Clinton, Essex, Franklin, Lewis, Jefferson, Hamilton and St. Lawrence Counties, accounts for 1.5% of New York State's private sector employment.
- Average wages in the region are 50% lower than the state's private sector wages.
- Clinton, Jefferson, and St. Lawrence counties account for 76% of the region's private sector employment.
- Clinton and St. Lawrence counties' private sector average wage is above the regional average.
- Hamilton County's private sector average wage is 40% below the region average.

Table 1. Private Sector Establishments, Employment and Wages, 2007

County	Establ.	Employment	Average Wage	% of Region Employment	% of Region Avg. Wage
Clinton	1,964	26,640	\$33,130	24%	107%
Essex	1,204	10,495	\$29,305	10%	95%
Franklin	1,095	10,507	\$28,149	10%	91%
Lewis	524	4,236	\$29,073	4%	94%
Jefferson	2,586	30,477	\$30,213	28%	98%
Hamilton	221	1,207	\$18,645	1%	60%
St. Lawrence	2,080	26,581	\$31,884	24%	103%
North Country Region	11,815	141,674	\$30,868	100%	100%
New York State	563,450	7,122,485	\$61,402	NA	NA

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Employment and Population Growth

- Employment growth in Franklin (5.7%) and Jefferson (7.4%) counties exceeded the state's employment growth rate of 3.9%.
- Franklin and Jefferson counties are in the top half of all New York State counties (62) in employment growth from 2004 to 2007.
- Clinton and Essex counties are the only two counties in the region to have negative employment growth.
- Essex County's employment decline was the fourth largest of all New York State counties.
- Jefferson County had the largest population growth (3.1%) of all New York State counties.
- Essex, Hamilton and St. Lawrence counties had population declines between 2004 and 2007.

Table 2. Percentage Change in Employment and Population, 2004-2007

County	Employment	Population	Employment Growth Rank	Population Growth Rank
Jefferson	7.4%	3.1%	5	1
Franklin	5.7%	0.0%	11	25
Hamilton	5.2%	-2.6%	13	61
St. Lawrence	2.6%	-0.4%	30	35
Lewis	2.2%	0.6%	34	19
Clinton	-0.5%	0.8%	51	15
Essex	-2.0%	-1.3%	58	52
New York State	3.9%	0.7%	NA	NA

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics and U.S. Census Bureau, Population Division

Interstate Business Moves

- The North Country region lost 278 establishments between 1990 and 2004. From them, 150 establishments moved out of the region to other New York State counties and 128 establishments moved to other states.
- A total of 266 establishments moved to the North Country between 1990 and 2004. From them, 160 establishments moved from other New York State counties and 106 from other states.
- The region had a net gain of 9 establishments from Vermont.

Table 3. Top Feeder States, 1990-2004

State	Net Establ. Gain
Vermont	26
New Jersey	10
Pennsylvania	9
Connecticut	8
Florida	7
Massachusetts, Texas	6
Texas	6

Table 4. Top Stealer States, 1990-2004

State	Net Establ. Gain
Florida	32
Vermont	17
Pennsylvania	15
North Carolina	8
Connecticut	6
Indiana	4
New Jersey	4
South Carolina, Texas	4

Source: National Establishment Times Series Data (Walls and Associates)

- The largest net loss of 25 establishments was from Florida.
- The largest establishment gains were observed in miscellaneous manufacturing, 7 establishments.

Table 5. Net Establishments Gains by Industry, 1990-2004

Industry	Move in	Move out	Net Change
Miscellaneous Manufacturing	12	5	7
Securities, Commodity Contracts, & Other Related	5	1	4
Miscellaneous Store Retailers	8	5	3
Fabricated Metal Product Manufacturing	3	0	3
Merchant Wholesalers, Durable Goods	27	25	2
Printing and Related Support Activities	4	2	2

Source: National Establishment Times Series Data (Walls and Associates)

- Manufacturing industries accounted for the largest share of net moves in the region.
- The largest net loss of 12 establishments was observed in Administrative and Support Services. Other industries with net losses are Food Services and Drinking Places, Accommodation and Repair and Maintenance with 10, 8 and 7 establishments respectively.

Table 6. Largest Net Establishments Losses by Industry, 1990-2004

Industry	Move in	Move out	Net Change
Administrative and Support Services	13	25	(12)
Food Services and Drinking Places	6	16	(10)
Accommodation	3	11	(8)
Repair and Maintenance	2	9	(7)
Rental and Leasing Services	3	9	(6)
Professional, Scientific, and Technical Services	22	28	(6)
Sporting Goods, Hobby, Book, and Music Stores	2	7	(5)
Religious, Grantmaking, Civic, Prof., & Similar Org.	4	8	(4)
Motor Vehicle and Parts Dealers	1	5	(4)
Computer and Electronic Product Manufacturing	0	4	(4)
Heavy and Civil Engineering Construction	2	6	(4)

Source: National Establishment Times Series Data (Walls and Associates)

Age Demographics by Industry

- The North Country region has a smaller share of retirement age workers (18%) than the state average across all industries (20%).
- The region’s share of retirement age workers in Financial Services, Information, Natural Resources and Mining, Retail Trade, and Other Services industries is higher than the statewide.
- The industries with the highest share of retirement age workers in the region are Natural Resources and Mining (23%), and Other Services (Public Administration included) (26%).

Table 7. Age demographics by Industry, 2007

Sector	New York State			North Country Region		
	Age14-19	Age 55+	%	Age 14-19	Age 55+	%
Construction	339,975	46,551	14%	6,400	692	11%
Education and Health Services	1,391,931	485,052	35%	45,218	8,914	20%
Financial Activities	563,062	73,263	13%	2,371	443	19%
Information	272,081	40,879	15%	1,964	394	20%
Leisure and Hospitality	705,563	80,651	11%	14,331	1,361	9%
Manufacturing	554,436	114,092	21%	14,382	2,395	17%
Natural Resources and Mining	26,235	5,161	20%	1,683	386	23%
Other Services (with Public Adm.)	782,458	178,552	23%	19,473	5,026	26%
Prof. and Business Services	1,347,954	216,700	16%	9,726	1,450	15%
Retail Trade	879,973	126,160	14%	18,262	2,731	15%
Transportation and Utilities	341,604	69,793	20%	5,151	914	18%
Wholesale Trade	363,472	65,427	18%	3,361	513	15%
All	7,568,744	1,502,281	20%	142,322	25,219	18%

Source: Local Employment Dynamics, New York State department of Labor

Section 3: Regional Competitive Industries

- From the 56 reportable, non-confidential, 3-digit NAICS industry sectors, 28 met at least one of the three competitiveness criteria.
- The total employment in these 28 industries accounts for 48% of the private employment in the North Country region for 2007.
- While no industries met all three competitive criteria, 5 industries met two of the criteria.
- The employment concentration in Forestry and Logging is more than 18 times the concentration of the state as a whole. Animal production has more than 10 times the concentration of the state, Primary Metal Manufacturing has more than 8 and Paper Manufacturing has 7 times the state concentration.
- Forestry and Logging is the only industry sector with a relative wage higher (3% higher) than the state wage.

Table 8. Industries Meeting At Least One Competitive Criterion (sorted by employment)³

NAICS	NAICS Description	Est.	Emp.	Average Wage	L.Q.	Relative Wage	Different. Growth Rate	Criteria Met
611	Educational Services	363	19,616	23,621	2.98	54%	-10%	*
622	Hospitals	39	10,271	13,469	1.29	25%	-4%	*
721	Accommodation	498	5,123	17,347	2.70	49%	-6%	*
813	Religious, Grantmaking, Civic Org.	1027	4,925	16,864	1.48	45%	-65%	*
452	General Merchandise Stores	136	4,298	15,207	1.43	70%	13%	*
236	Construction of Buildings	802	3,497	34,398	1.64	62%	-6%	*
322	Paper Manufacturing	27	3,205	31,765	6.98	62%	-25%	*
441	Motor Vehicle and Parts Dealers	410	2,839	29,673	1.54	67%	-4%	*
811	Repair and Maintenance	880	2,641	25,798	1.94	78%	22%	**
237	Heavy and Civil Engineering	185	2,423	66,343	3.79	92%	12%	*
331	Primary Metal Manufacturing	9	2,414	12,030	8.43	21%	-19%	*
444	Build. Material, Equip. Dealers	259	2,166	26,485	1.40	81%	27%	**
112	Animal Production	661	2,026	24,840	10.78	85%	-14%	*
511	Publishing Industries (except	86	1,758	22,297	0.89	26%	22%	*
453	Miscellaneous Store Retailers	600	1,693	16,543	1.42	54%	-4%	*
484	Truck Transportation	279	1,577	32,358	1.64	76%	-2%	*
326	Plastics and Rubber Products	25	1,428	5,287	2.49	13%	30%	**
335	Elect. Equip., Appliance Manfr.	22	1,364	5,357	3.81	10%	58%	**
221	Utilities	56	1,235	71,307	1.36	77%	5%	*
488	Support Activities for Transportation	159	1,176	18,481	1.65	38%	-9%	*
339	Miscellaneous Manufacturing	108	1,170	12,292	1.23	25%	25%	*
111	Crop Production	343	815	14,248	3.18	58%	-3%	*
323	Printing and Related Support	62	620	16,097	0.79	34%	32%	*
492	Couriers and Messengers	31	438	11,174	0.49	29%	47%	*
212	Mining (except Oil and Gas)	28	387	21,137	3.62	41%	-84%	*
113	Forestry and Logging	87	369	32,777	18.78	103%	12%	**
326	Wood Product Manufacturing	61	326	23,205	1.49	64%	-13%	*
115	Support Activities for Agriculture	59	139	4,047	2.76	13%	-17%	*

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics and U.S. Census Bureau, Population Division

³ Cells shaded in grey represent industries with location quotient greater than or equal to 1.25, relative average wage greater than 100% and differential employment growth rate greater than or equal to 20%.

Section 4: Employment Projection by Industry

- Of the 28 competitive industries in the North Country region 11 are projected to have positive employment growth between 2007 and 2016.
- All of these 11 industries are projected to grow faster than the region average.
- The region's average employment growth for this period is projected to be negative, -8%.
- The highest projected employment is observed in Forestry and Logging, which is the top most competitive sector in the area.
- Other sectors with high projected employment growth are Support Activities for Agriculture and Forestry, Support Activities for Transportation, Animal Production, Crop Production and Wood Product Manufacturing.
- Sectors that have traditionally been strongly represented in the region, such as Accommodation and Paper Manufacturing are projected to experience employment decline by 2016.
- The industries with the highest employment decline are Publishing Industries and Heavy and Civil Engineering.

Table 9. Competitive Industry Employment Growth Projection (sort by % change)⁴

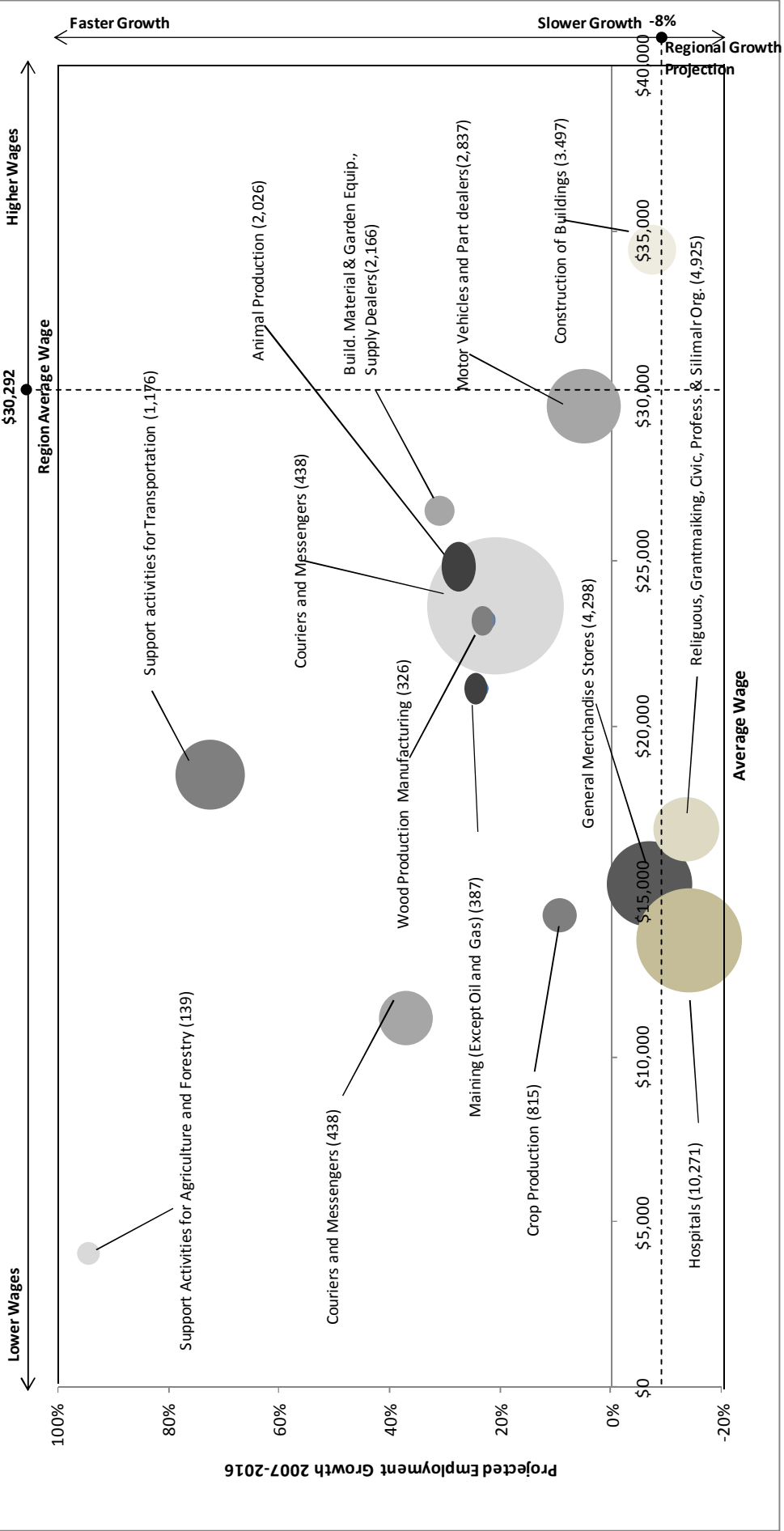
NAICS	NAICS Description	2007	2016	Change	% Change
113	Forestry and Logging	369	1,700	1,331	361%
115	Support Activities for Agric. and Forestry	139	270	131	94%
488	Support Activities for Transportation	1,176	2,030	854	73%
492	Couriers and Messengers	438	600	162	37%
444	Buld. Mater., Equip. & Suppl Dealers	2,166	2,840	674	31%
112	Animal Production	2,026	2,600	574	28%
212	Mining (except Oil and Gas)	387	480	93	24%
326	Wood Product Manufacturing	326	400	74	23%
611	Educational Services	19,616	23,720	4,104	21%
111	Crop Production	815	890	75	9%
441	Motor Vehicle and Parts Dealers	2,839	2,980	141	5%
452	General Merchandise Stores	4,298	4,000	(298)	-7%
236	Construction of Buildings	3,497	3,240	(257)	-7%
813	Religious, Grant, Civic & Similar Org.	4,925	4,250	(675)	-14%
622	Hospitals	10,271	8,810	(1,461)	-14%
323	Printing and Related Support Activities	620	520	(100)	-16%
339	Miscellaneous Manufacturing	1,170	930	(240)	-21%
484	Truck Transportation	1,577	990	(587)	-37%
335	Electr. Equip., Appliance, & Compon.	1,364	820	(544)	-40%
322	Paper Manufacturing	3,205	1,920	(1,285)	-40%
221	Utilities	1,235	730	(505)	-41%
721	Accommodation	5,123	2,850	(2,273)	-44%
331	Primary Metal Manufacturing	2,414	1,330	(1,084)	-45%
453	Miscellaneous Store Retailers	1,693	920	(773)	-46%
326	Plastics and Rubber Products	1,428	710	(718)	-50%
811	Repair and Maintenance	2,641	1,280	(1,361)	-52%
511	Publishing Industries (except Internet)	1,758	800	(958)	-54%
237	Heavy and Civil Engineering	2,423	930	(1,493)	-62%

Projected Employment Growth

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics and U.S. Census Bureau, Population Division and NYS Department of Labor

⁴ Cells shaded in grey represent industries with location quotient greater than or equal to 1.25, relative average wage greater than 100% and differential employment growth rate greater than or equal to 20%.

Top 15 Regionally Competitive Industries



Appendix 1: Companies Moves to the North Country Region

Company	Industry	Destin. County	Origin City	Origin State	Move Emp
1990					
Hughes Heating & Cooling	Specialty Trade Contractors	Essex	West Olive	MI	2
Lindas Sewing Unlimited	Administrative and Support Services	Jefferson	Marlborough	MA	3
Beaver Industries Inc	Merchant Wholesalers, Durable Goods	Clinton	Framingham	MA	4
Ronnies Taping & Drywall Inc	Specialty Trade Contractors	Clinton	Rutland	VT	5
Mastertech Inc	Motor Vehicle and Parts Dealers	Clinton	S. Burlington	VT	7
1991					
Ellis Kenneth J Co	Specialty Trade Contractors	St Lawrence	Haddonfield	NJ	5
Von Roll Transport Systems	Machinery Manufacturing	Jefferson	San Jose	CA	25
Wagon-Master	Merchant Wholesalers, Durable Goods	Franklin	Wolcott	VT	2
Weissman Ira M & Evelyn Md	Ambulatory Health Care Services	Franklin	Saint Marys	GA	7
Cold Spring Farm Development	Clothing and Clothing Accessories Stores	Essex	Burlington	VT	1
United States Ski Association	Professional, Scientific & Technical Services	Essex	Brattleboro	VT	6
1992					
Great Lakes Cheese of N Y Inc	Food Manufacturing	Jefferson	Newbury	OH	1
Atlantic Fuels	Nonstore Retailers	Clinton	Barre	VT	7
1993					
Beaverite Products Inc	Printing and Related Support Activities	Lewis	Woodbridge	CT	5
North Country Spring Water	Nonstore Retailers	Essex	Atlantic City	NJ	8
Birchwood Racquet Club	Amusement, Gambling, & Recreation Indust.	Jefferson	Clarks Summit	PA	15
Laundry Den	Personal and Laundry Services	Clinton	Burlington	VT	4
Bigelow-Liptak Corp	Information services & Data Processing	Jefferson	Plymouth	MI	4
Black River Ltd Partnership	Utilities	Jefferson	Charlotte	NC	49
United States Biathalon Assn	Amusement, Gambling, & Recreation Indust.	Essex	Winooski	VT	5
Goett International Inc	Merchant Wholesalers, Nondurable Goods	Lewis	Hoboken	NJ	3
1994					
Storm King Corp	Merchant Wholesalers, Nondurable Goods	Essex	Hilton Head	SC	3
Domac Enterprises Incorpor.	Miscellaneous Manufacturing	Lewis	New Haven	CT	4
Little River Sales & Service	Merchant Wholesalers, Durable Goods	St Lawrence	Jamestown	ND	3
1995					
Pride Transport	Truck Transportation	Jefferson	Battleboro	NC	3
Tri-Hawk Corporation	Merchant Wholesalers, Durable Goods	St Lawrence	Los Angeles	CA	6
Godreau Charles Md	Ambulatory Health Care Services	St Lawrence	Dedham	MA	4
Stephens Simone S	Professional, Scientific and Technical Serv.	Essex	Shelburne	VT	3
1996					
Desert Communications V Inc	Broadcasting (except Internet)	Jefferson	Phoenix	AZ	25
Diamond Comic Distributors	Merchant Wholesalers, Nondurable Goods	Clinton	Woburn	MA	15
Mannsville Chemical Products	Publishing Industries (except Internet)	Jefferson	Asbury Park	NJ	2
Adirondack Life Inc	Publishing Industries (except Internet)	Essex	Sarasota	FL	17
J Allen Puma & Associates	Ambulatory Health Care Services	Clinton	S. Burlington	VT	4

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1997					
Tubeecraft Corporation	Fabricated Metal Product Manufacturing	Clinton	Cleveland	OH	35
Van Cleve Collection Inc	Clothing and Clothing Accessories Stores	Essex	Paoli	PA	5
1998					
Helms Design Group	Professional, Scientific and Technical Serv.	Jefferson	Green Bay	WI	1
Us Canoe & Kayak Team	Religious, Grant, Civic, Prof., & Similar Org.	Essex	Indianapolis	IN	6
Herban Stylz	Clothing and Clothing Accessories Stores	Clinton	Burlington	VT	3
Blaiklock (Usa) Inc	Support Activities for Transportation	Clinton	Blaine	WA	7
Whalen Barbara H Md	Ambulatory Health Care Services	Franklin	Kissimmee	FL	20
Impression Enterprises Inc	Merchant Wholesalers, Durable Goods	St Lawrence	Morris Plains	NJ	5
1999					
Nuarms Inc	Electr. Equip., Appliance, & Compon. Mnfr.	Clinton	Meriden	CT	7
Micray Press Inc	Professional, Scientific and Technical Serv.	St Lawrence	New Brunswick	NJ	4
Culver Minit Mart & Svc Stn	Gasoline Stations	Jefferson	Sylvania	GA	1
Valley Painting & Papering Svc	Specialty Trade Contractors	Clinton	Granby	CT	1
Valio International U S A Inc	Food Manufacturing	St Lawrence	Parsippany	NJ	2
Fergnus Services	Publishing Industries (except Internet)	St Lawrence	Quakertown	PA	1
2000					
Meldisco K-M of Ford St	Clothing and Clothing Accessories Stores	St Lawrence	Mahwah	NJ	7
2001					
Moore Bill	Merchant Wholesalers, Durable Goods	Franklin	Dallas	TX	3
Innovative Surveying Tech	Professional, Scientific and Technical Serv.	Clinton	Burleson	TX	3
Lake Placid Provisions	Food and Beverage Stores	Essex	Lakeside	NE	2
Eagle Eye Janitorial	Administrative and Support Services	Jefferson	Winter Haven	FL	2
Pet Pantry	Miscellaneous Store Retailers	St Lawrence	Hampstead	NH	1
Zufall Robert Farm	Animal Production	St Lawrence	Fairhope	PA	1
2002					
Vanlieu Richard	Animal Production	Franklin	Lebanon	PA	1
Walking Rock Farm Llc	Miscellaneous Manufacturing	Clinton	Johnson	VT	2
Bower Joe	Construction of Buildings	Franklin	Austin	TX	3
Vermont-Friesland Corp.	Securities, Commodity Contracts, & Others	Essex	Burlington	VT	50
Briscoe & Burroughs Ltd	Miscellaneous Manufacturing	Clinton	Burlington	VT	1
Bill Mcdowell Photography	Personal and Laundry Services	Clinton	Commerce	TX	1
Southwest Box Corp	Merchant Wholesalers, Nondurable Goods	Clinton	Dallas	TX	5
Poultney Citgo	Repair and Maintenance	Essex	Poultney	VT	2
Interexpress Inc	Truck Transportation	Clinton	Burlington	VT	22
Hoosier Magnetics Inc	Nonmetallic mineral product mfg	St Lawrence	Holland	OH	10
Luera Diane	Non-classified	St Lawrence	Fort Irwin	CA	1
Magic Door Education	Non-classified	St Lawrence	Bowie	MD	5
B C F Farms	Animal Production	Clinton	Freeport	IL	1
Alternative Wellness Products	Miscellaneous Store Retailers	Essex	Ramsey	NJ	1
Floor Sanders	Specialty Trade Contractors	Essex	Key West	FL	1
H & R Block	Professional, Scientific and Technical Serv.	Essex	Benson	VT	9
Arcadia Books & Gifts	Miscellaneous Store Retailers	Essex	Seymour	CT	1

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2003					
Federal Pipe And Steel Corp	Merchant Wholesalers, Durable Goods	Clinton	Plymouth	MI	40
Robert J Johnson Md	Ambulatory Health Care Services	Jefferson	Petoskey	MI	4
Gold Medallion Awards Inc	Professional, Scientific and Technical Serv.	Jefferson	St Petersburg	FL	9
Elaine Cave Indep	Administrative and Support Services	Franklin	Winter Park	FL	1
Boke	Miscellaneous Manufacturing	St Lawrence	Cheshire	CT	1
Kenneth J Woody	Animal Production	Franklin	West Glover	VT	1
Peter W Conley	Animal Production	Franklin	Limington	ME	2
Brad International Inc	Merchant Wholesalers, Nondurable Goods	Essex	Weston	CT	2
Head Gary D	Construction of Buildings	St Lawrence	Puyallup	WA	1
Old Heidelberg German Rest	Food Services and Drinking Places	Clinton	Burlington	VT	10
Bulwagga Bay Asset Mgm	Administrative and Support Services	Essex	Burlington	VT	4
Olvert Mary Jane	Miscellaneous Manufacturing	Jefferson	Camp Hill	PA	2
Wilson Paul F Cpa	Professional, Scientific and Technical Serv.	Lewis	Woodstock	VA	2
Medical Vocational Services	Social Assistance	Jefferson	Upperco	MD	3
2004					
Federal Pipe And Steel Corp	Merchant Wholesalers, Durable Goods	Clinton	Plymouth	MI	40
Robert J Johnson Md	Ambulatory Health Care Services	Jefferson	Petoskey	MI	4
Gold Medallion Awards Inc	Professional, Scientific and Technical Serv.	Jefferson	St Petersburg	FL	9
Elaine Cave Indep	Administrative and Support Services	Franklin	Winter Park	FL	1
Boke	Miscellaneous Manufacturing	St Lawrence	Cheshire	CT	1
Kenneth J Woody	Animal Production	Franklin	West Glover	VT	1
Peter W Conley	Animal Production	Franklin	Limington	ME	2
Brad International Inc	Merchant Wholesalers, Nondurable Goods	Essex	Weston	CT	2
Head Gary D	Construction of Buildings	St Lawrence	Puyallup	WA	1
Old Heidelberg German Rest	Food Services and Drinking Places	Clinton	Burlington	VT	10
Bulwagga Bay Asset Mgm	Administrative and Support Services	Essex	Burlington	VT	4
Olvert Mary Jane	Miscellaneous Manufacturing	Jefferson	Camp Hill	PA	2
Wilson Paul F Cpa	Professional, Scientific and Technical Serv.	Lewis	Woodstock	VA	2
Medical Vocational Services	Social Assistance	Jefferson	Upperco	MD	3
Federal Pipe And Steel Corp	Merchant Wholesalers, Durable Goods	Clinton	Plymouth	MI	40
Robert J Johnson Md	Ambulatory Health Care Services	Jefferson	Petoskey	MI	4
Gold Medallion Awards Inc	Professional, Scientific and Technical Serv.	Jefferson	St Petersburg	FL	9
Elaine Cave Indep	Administrative and Support Services	Franklin	Winter Park	FL	1
Boke	Miscellaneous Manufacturing	St Lawrence	Cheshire	CT	1
Kenneth J Woody	Animal Production	Franklin	West Glover	VT	1
Peter W Conley	Animal Production	Franklin	Limington	ME	2

Appendix 2: Companies Moves from the North Country Region

Company	Industry	Destin. County	Origin State	Move Emp
1990				
Smith George T Ii	Merchant Wholesalers, Durable Goods	St Lawrence	CT	7
Water Fun Acquasition Inc	Amusement, Gambling, and Recreation	Jefferson	CT	3
1991				
Dragoon And Moore Builders	Construction of Buildings	Clinton	PA	1
Bariatrrix International	Warehousing and Storage	Clinton	VT	40
Watertown Rental Systems Inc	Rental and Leasing Services	Jefferson	LA	2
Bourdeau Bros Inc	Chemical Manufacturing	Clinton	VT	13
1992				
General Signal Corporation	Machinery Manufacturing	Jefferson	SC	350
Briggs Service Co	Repair and Maintenance	Essex	CT	4
Bombardier Corporation	Merchant Wholesalers, Durable Goods	Franklin	VT	149
1993				
Video News Inc	Rental and Leasing Services	Clinton	FL	5
Stebbins International Ltd	Merchant Wholesalers, Durable Goods	Jefferson	VI	4
Lyonsdale Energy Ltd Partn	Utilities	Lewis	CA	1
Bugatchi Uomo Inc	Merchant Wholesalers, Nondurable Goods	Clinton	FL	12
Mj Apparel Inc	Apparel Manufacturing	Clinton	FL	50
Canton Cellular Corporation	Telecommunications	St Lawrence	FL	15
Little River Sales & Service	Merchant Wholesalers, Durable Goods	St Lawrence	ND	3
1994				
Bassett Mtn Recreation Ctr	Amusement, Gambling, and Recreation	Essex	FL	2
Northern Parts And Supply	General Merchandise Stores	Franklin	AZ	4
Adirondack Trucks	Motor Vehicle and Parts Dealers	Essex	FL	1
Birchwood Racquet Club	Amusement, Gambling, and Recreation	Jefferson	PA	12
Calkins Golf Shop	Sporting Goods, Hobby, Book, and Music Stores	St Lawrence	IL	1
Patricks Of Burlington Inc	Nonstore Retailers	Clinton	VT	25
St Lawrence Freightways Corp	Truck Transportation	Jefferson	PA	20
Casier Realty Company	Heavy and Civil Engineering Construction	Franklin	FL	5
Sdc North America Inc	Merchant Wholesalers, Durable Goods	Clinton	WA	5
1995				
Underwood Enterprises Iii	Food Services and Drinking Places	Clinton	FL	3
May Audio Marketing Inc	Merchant Wholesalers, Durable Goods	Clinton	TN	5
Kamine/Besicorp Beaver Fls Lp	Specialty Trade Contractors	Lewis	NJ	2
Adirondack Life Inc	Publishing Industries (except Internet)	Essex	FL	17
Churchmouse Needle Crafts	Sporting Goods, Hobby, Book, and Music Stores	Jefferson	PA	10
Thivierge Gary	Merchant Wholesalers, Durable Goods	Jefferson	TN	1
Wilcox Charles J Jr	Truck Transportation	Jefferson	NC	8
1996				
Davined Cleaning Associates	Administrative and Support Services	Jefferson	FL	4
Suttons Disposal Service Inc	Waste Management and Remediation Services	Clinton	MO	3
Kemp Construction Inc	Heavy and Civil Engineering Construction	Jefferson	NC	27

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Martins Pretzel Bakery	Food Manufacturing	Jefferson	PA	10
Gellasch Richard	Administrative and Support Services	Jefferson	VA	3
1997				
All Jersey Pest Control Inc	Administrative and Support Services	Jefferson	NJ	8
Yandow Apartments	Real Estate	Clinton	VT	2
1998				
Puma J Allen Od Pc	Ambulatory Health Care Services	Clinton	VT	6
Esh Construction	Construction of Buildings	Jefferson	KY	1
H Patrick Travers Construction	Administrative and Support Services	St Lawrence	VT	1
Hite Coal & Stone Supply	Merchant Wholesalers, Durable Goods	St Lawrence	PA	1
1999				
American Carbonate Rock Inc	Mining (except Oil and Gas)	Clinton	WA	8
Woodmen World Life Ins Soc	Insurance Carriers and Related Activities	Clinton	VT	1
Gordon Oil Co Inc	Nonstore Retailers	Clinton	FL	5
Armstrong Industrial Spc	Paper Manufacturing	Lewis	PA	106
2000				
Stone Wells Frm Bed Breakfast	Accommodation	Essex	NH	1
Paragon Group (Us) Inc	Machinery Manufacturing	St Lawrence	FL	25
Balkin Library & Info Ser	Professional, Scientific and Technical Services	St Lawrence	PA	1
Rock Harlan	Food and Beverage Stores	Clinton	VA	9
Brice James	Animal Production	St Lawrence	FL	2
Custom Pin And Design	Miscellaneous Manufacturing	Essex	FL	4
On Line Solutions Inc	Data Processing, Hosting, and Related Serv.	Clinton	FL	5
Defayette Enterprises Inc	Motor Vehicle and Parts Dealers	Franklin	FL	4
Thorp Margaret	Professional, Scientific and Technical Services	St Lawrence	KS	1
Day & Zimmermann Facility Svc	Real Estate	Clinton	SC	15
Wfff Fox 44	Computer and Electronic Product Manufr.	Clinton	VT	32
Northern Ecological Associates	Professional, Scientific and Technical Services	St Lawrence	ME	11
2001				
Tremcar Usa Inc	Transportation Equipment Manufacturing	Clinton	PA	22
Taste Of India	Food Services and Drinking Places	Essex	VT	3
Skb Telecom Inc	Telecommunications	Jefferson	FL	1
International Golf	Sporting Goods, Hobby, Book, & Music Stores	Clinton	VT	3
Badke Charlie	Personal and Laundry Services	Essex	VA	1
Kaup Inc	Professional, Scientific and Technical Services	St Lawrence	FL	2
Morehouse Jennifer	Ambulatory Health Care Services	Jefferson	PA	1
Adirondack Computer Sol	Professional, Scientific and Technical Services	St Lawrence	CT	4
Johnson Roy	Administrative and Support Services	Essex	IN	1
Copytek Office Products Inc	Merchant Wholesalers, Nondurable Goods	Clinton	VT	6
General Management Consulting	Professional, Scientific and Technical Services	Jefferson	FL	2
Calumet Island Yacht Club Inc	Amusement, Gambling, and Recreation	Jefferson	NJ	2
Northland Hides Processing	Merchant Wholesalers, Nondurable Goods	Clinton	OH	30
2002				
Amh Realty	Real Estate	Essex	TX	1
Harbor Master Restaurant	Food Services and Drinking Places	St Lawrence	PA	12
New Life Appliance	Repair and Maintenance	Franklin	TN	1

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Mower John A	Food Services and Drinking Places	Clinton	VT	2
Ronald & Diana Slusarczyk Inc	Amusement, Gambling, and Recreation	Clinton	VT	7
Shroom Art	Crop Production	Franklin	CA	2
Bull Roger	Insurance Carriers and Related Activities	Jefferson	PR	2
Roctest Inc	Computer and Electronic Product Manufr.	Clinton	RI	8
Dj Trucking	Truck Transportation	Franklin	OH	3
Bien Venue Limited	Accommodation	Clinton	NC	4
Old Dock House Restaurant Inc	Food Services and Drinking Places	Essex	VT	40
Moore Barry A	Performing Arts, Spectator Sports, etc.	Jefferson	CO	1
Met Life Auto & Home	Insurance Carriers and Related Activities	St Lawrence	CT	3
Cg Leasing Inc	Specialty Trade Contractors	Clinton	FL	9
Golden Dollar Arcade	Amusement, Gambling, and Recreation	Clinton	NJ	3
2003				
Mc Coy Mark	Animal Production	St Lawrence	PA	1
Lewin Candace J	Administrative and Support Services	St Lawrence	NC	1
Connors Group Architects	Professional, Scientific and Technical Services	Clinton	NC	3
Durham Forest Products	Forestry and Logging	St Lawrence	KY	3
Hudda Corp	Food Services and Drinking Places	Clinton	CT	31
Luera Diane	Non-classified	St Lawrence	TX	1
Crams Catering	Food Services and Drinking Places	Essex	TX	1
Nails 2000	Personal and Laundry Services	Jefferson	FL	1
Sackerol Enterprises Inc	Administrative and Support Services	Clinton	FL	1
Freedman Henry K Md	Ambulatory Health Care Services	Clinton	RI	1
Anchor Technologies Llc	Administrative and Support Services	Clinton	IL	1
Lakeview Motel & Apts	Accommodation	St Lawrence	IN	2
Inn Dresser	Professional, Scientific and Technical Services	Clinton	NC	1
Photographs By Jan Thiess	Professional, Scientific and Technical Services	Jefferson	PA	1
De Franca Geoffrey J	Religious, Grant, Civic, Profes., etc.	Jefferson	NH	1
2004				
Inn Dresser	Professional, Scientific and Technical Services	Clinton	SC	1
Ansen Corporation	Computer and Electronic Product Manufr.	St Lawrence	CA	103
Us Canoe & Kayak Team	Religious, Grant, Civic, Profes., etc.	Essex	NC	3
Riverside Designs	Furniture and Related Product Manufacturing	Essex	FL	1
All Pro Bicycle Shop	Sporting Goods, Hobby, Book, & Music Stores	Jefferson	IN	2
Major Cheryl	Personal and Laundry Services	Jefferson	FL	1
Nantucket Bookcase Co	Specialty Trade Contractors	Franklin	SC	2
Cape Vincent Self Storage	Warehousing and Storage	Jefferson	FL	2
Northern Photography	Professional, Scientific and Technical Services	Jefferson	AZ	1
Hardgraves R W Md F A C S	Ambulatory Health Care Services	Clinton	WV	5
Trotting Bull Steakhouse	Accommodation	Jefferson	FL	11
Edwards Productions	Broadcasting (except Internet)	St Lawrence	PA	6
One Eyed Jack Contract Acts	Amusement, Gambling, and Recreation	Jefferson	NC	2
PAIGES TRANSPORTATION	Truck Transportation	Jefferson	IN	1
Vachons 1812 Steak Seafood Co	Food Services and Drinking Places	Jefferson	FL	18
Ekman Susan	Textile Product Mills	St Lawrence	FL	1
Plattsburgh Vacuum Center	Electronics and Appliance Stores	Clinton	FL	1

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Woodland Log Homes	Construction of Buildings	Clinton	VT	1
Blue Ribbon Automotive	Repair and Maintenance	Jefferson	FL	2
Murray John & Son Movers	Truck Transportation	Jefferson	FL	3
Gbhj Enterprises	Administrative and Support Services	Jefferson	GA	1
Carbone Design	Professional, Scientific and Technical Services	Jefferson	TX	1
Whiteface Chalet Inc	Accommodation	Essex	FL	11
Messner Norman	Merchant Wholesalers, Durable Goods	St Lawrence	PA	1
Maxnet Services Inc	Telecommunications	Essex	UT	3
Heaven Hill Farm	Animal Production	Essex	WI	2
Inn Dresser	Professional, Scientific and Technical Services	Clinton	SC	1
Ansen Corporation	Computer and Electronic Product Manufr.	St Lawrence	CA	103
Us Canoe & Kayak Team	Religious, Grant, Civic, Profes., etc.	Essex	NC	3
Riverside Designs	Furniture and Related Product Manufacturing	Essex	FL	1
All Pro Bicycle Shop	Sporting Goods, Hobby, Book, & Music Stores	Jefferson	IN	2
Major Cheryl	Personal and Laundry Services	Jefferson	FL	1

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