



Pennsylvania defines industry clusters to serve as the basis for data-driven workforce development policies. An industry cluster includes industries closely linked by common products, labor pools, technologies, supplier chains and training needs. They take on strategic importance for long-term economic planning as changes that benefit one group member will generally impact other members of the cluster.

Industry clusters are comprised of specific six-digit North American Industry Classification System, or NAICS, codes. They are mutually exclusive, so that no two clusters contain the same NAICS code. Currently, there are 12 clusters identified, along with several critical sub-clusters. Combined, these 12 industry clusters account for nearly 85 percent of all employment in the commonwealth.

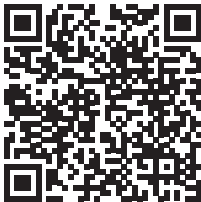
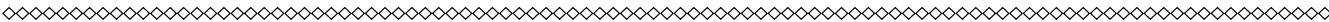
Cluster Summary

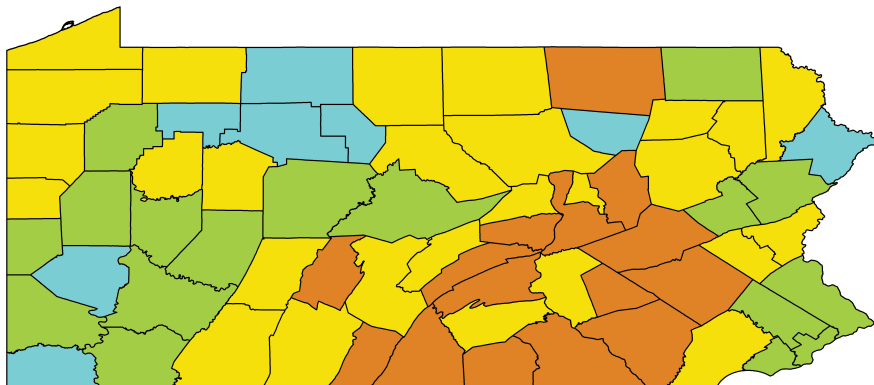
The Agriculture & Food Production (AFP) cluster begins with the growing of food crops, including grains and livestock, and ends with the wholesale distribution of these products. The cluster also includes support industries, such as refrigerated warehousing and fertilizer manufacturing, as well as public agencies that oversee agricultural programs.

	2018	2023
Employer Units	8,238	8,901
Number of Jobs	179,083	195,182
Percent of Total Pennsylvania Jobs	3.1%	3.3%
Average Annual Wages	\$46,911	\$56,217
Location Quotient (LQ)	0.84	0.89

LQs greater than one suggest a competitive advantage.

AFP cluster employment in Pennsylvania has increased slightly and it is a reflection of the economy as a whole. The cluster continued to account for approximately 3.0% of total employment in the commonwealth. National employment has mirrored state employment closely as the location quotient (LQ) has increased just slightly. Notably, however, is the fact that this traditionally low-paying cluster has seen significant gains in average wages; about a 20 percent increase since 2018.



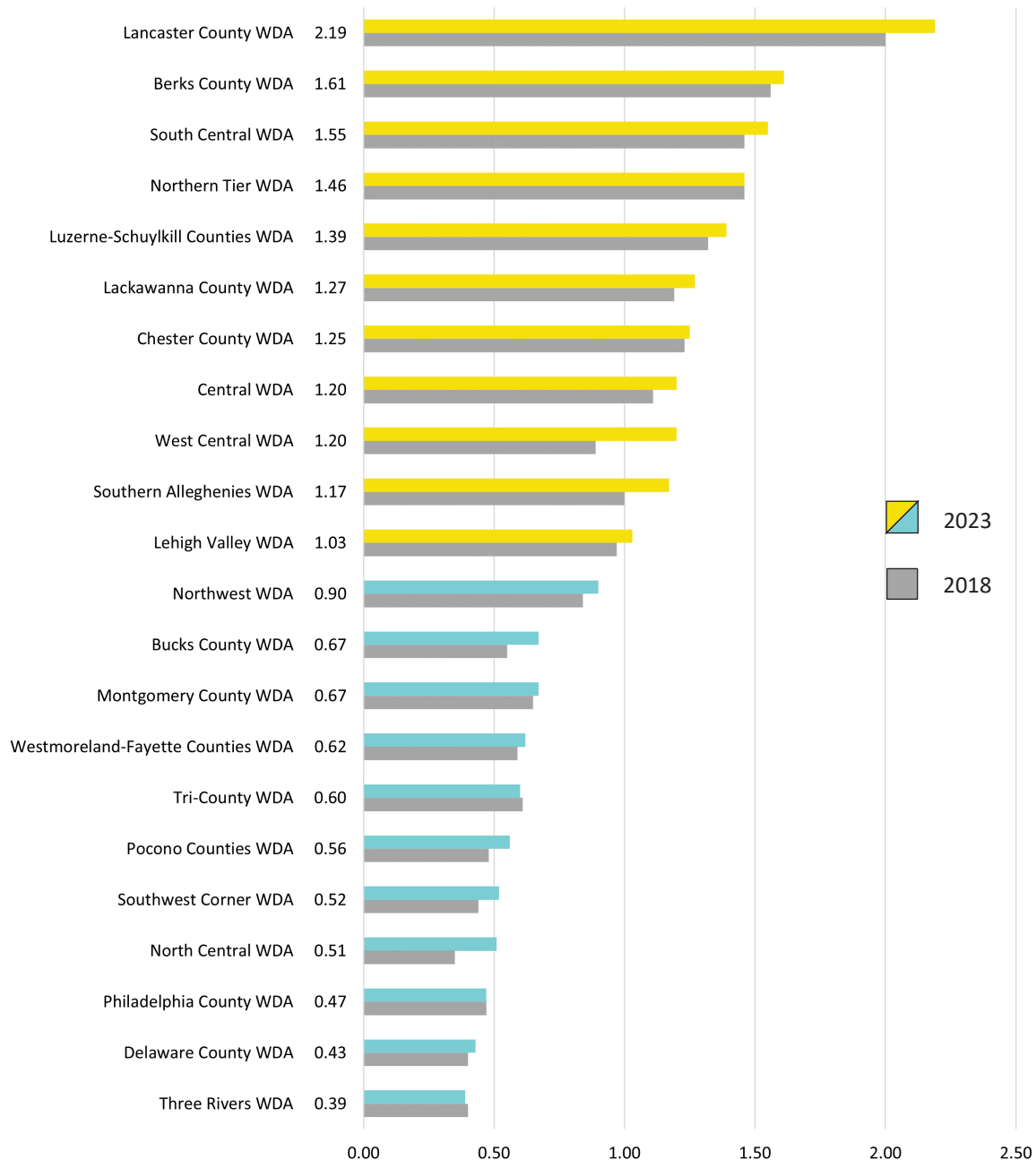


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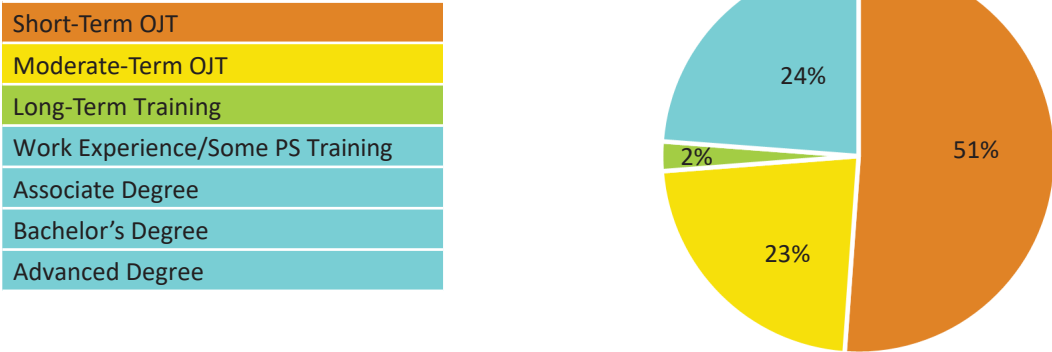
- Veterinary Services
 - General Line Grocery Merchant Wholesalers
 - Commercial Bakeries
 - Meat Processed from Carcasses
 - Other Snack Food Manufacturing
 - Other Grocery Product Merchant Wholesalers
 - Animal, Except Poultry, Slaughtering
 - Nursery, Garden & Farm Supply Retailers
 - Confectionery Mfg. from Purchased Chocolate
 - Breweries
 - Fruit & Vegetable Merchant Wholesalers
 - Poultry Processing
 - Retail Bakeries
 - Fruit & Vegetable Canning
 - Mushroom Production
 - Perishable Prepared Food Mfg.
 - Refrigerated Warehousing & Storage
 - Chocolate & Confectionery Mfg. from Cacao Beans
 - Dairy Cattle & Milk Production
 - Fluid Milk Manufacturing

Employment Concentration

A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. The Lancaster Workforce Development Area (WDA) has the highest LQ of any area and it has increased by 9.9% in recent years. Only Southern Alleghenies and West Central WDAs have both LQs greater than one and have also increased their competitiveness by more than 15 percent since 2018.



This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. Seventy-four percent of AFP jobs require less than one year of on-the-job training to enter employment. The lower-skilled occupations that make up this cluster will most likely remain, with technological advancement only requiring slightly more training.



Occupations with Significant Employment

The following table lists occupations that employ at least 3,400 people in the AFP cluster.

			Annual Demand	
SOC Code	Occupation	Average Wage	All Industries	Industry Cluster
45-2092	Farmworkers & Laborers: Crop, Nursery & Greenhouse	\$38,480	3,565	3,282
45-2093	Farmworkers: Farm, Ranch & Aquacultural Animals	\$37,930	1,856	1,772
53-7062	Laborers & Freight/Stock/Material Movers	\$42,240	20,336	1,436
51-9111	Packaging & Filling Machine Operators/Tenders	\$45,310	2,248	1,380
51-3092	Food Batchmakers	\$42,310	1,297	1,269
53-7065	Stockers & Order Fillers	\$37,680	17,641	1,072
41-2031	Retail Salespersons	\$34,320	22,324	856
53-7064	Packers & Packagers	\$37,020	4,487	825
53-3032	Heavy & Tractor-Trailer Truck Drivers	\$58,620	10,255	749
41-2011	Cashiers	\$29,170	22,739	696
51-3011	Bakers	\$34,460	1,538	656
11-9013	Farmers, Ranchers & Other Agricultural Managers	\$90,830	3,070	626
41-4012	Sales Representatives	\$80,780	5,344	521
53-7051	Industrial Truck & Tractor Operators	\$49,210	3,364	423
53-3033	Light Truck Drivers	\$44,770	5,072	380

*The 2024 average annual wage reflects wages across all industries and is not specific to the cluster.