

New Orleans Cluster Briefing

November 2005

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- Aggregate Economic and Demographic Statistics
- Cluster-Level Economic Profile
- Efforts Underway (as of 2001)
- Additional Inner-City Detail
- Detail on the Port Issue
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Economic Performance Indicators

New Orleans Metropolitan Area

Economic Performance

Employment¹, 2002

- in New Orleans: 525,160
- % of US: 0.47%

Employment growth per year, 1990 to 2002

- in New Orleans: 1.27% (rank 236²)
- in the US: 1.55%

Average wages, 2002

- in New Orleans: \$30,339
- in the US: \$35,081
- New Orleans % below US: 13.5%

Average wage growth per year, 1990 to 2002

- in New Orleans: 3.28% (rank 228)
- in the US: 3.77%

Innovation Output

Patents per 10,000 employees, 2002

- in New Orleans: 3.20
- in the US: 7.67

Growth in patents per year, 1990 to 2002

- in New Orleans: 3.44% (rank 210)
- in the US: 5.35%

Traded establishment formation, 1990 to 2002

- in New Orleans: 3.00% (rank 242)
- in the US: 3.75%

¹ Employment data includes all employees on firm payrolls; excludes government and agricultural employees and the self-employed.

² Ranks are among 361 US metro areas.

New Orleans Demographics Snapshot (August 2005¹)

	Inner City (Rank*)	Metropolitan Area
Total Population	283,000 (17th largest)	1,170,000
% Metropolitan Area Population	27%	73%
High School Attainment	66% (#43)	81%
College Attainment	17% (#23)	24%
Minority Population	85% (#23)	34%
Population 25 and under	41% (#63)	35%
Homeownership Rate	36% (#63)	69%
Poverty Rate	38% (2nd highest)	13%
Income Density (\$M per square mile)	\$54M (#53)	\$7M
Unemployment Rate	13% (#41)	5%
Median Household Income	\$19,900 (#95)	\$27,300**

*Source: 2000 U.S. Census. Note: ICIC ranks 100 large inner cities by the highest percentage or value in each category. Inner City and Metropolitan Area are exclusive categories. Household is as defined by the U.S. Census.

**Metropolitan Area including inner city

New Orleans Business Base

(August 2005¹)

	Inner City (Rank)*	Metropolitan Area
Total Jobs (Private only)	121,000 (#24)	404,000
Job Growth, 1995 to 2002 CAGR	-0.9% (#61)	1.3%
Total Establishments	6,000 (#20)	26,000
Establishment Growth, 1995 to 2002 CAGR	-1.4% (#67)	1.0%
Wage Growth, 1995 to 2002 CAGR	1.1% (#55)	0.9%
2005 Business Startups (per 1000 establishments)	13.6 (#77)	14.1
2004 Bankruptcies (per 1000 establishments)	1.1 (#88)	1.6

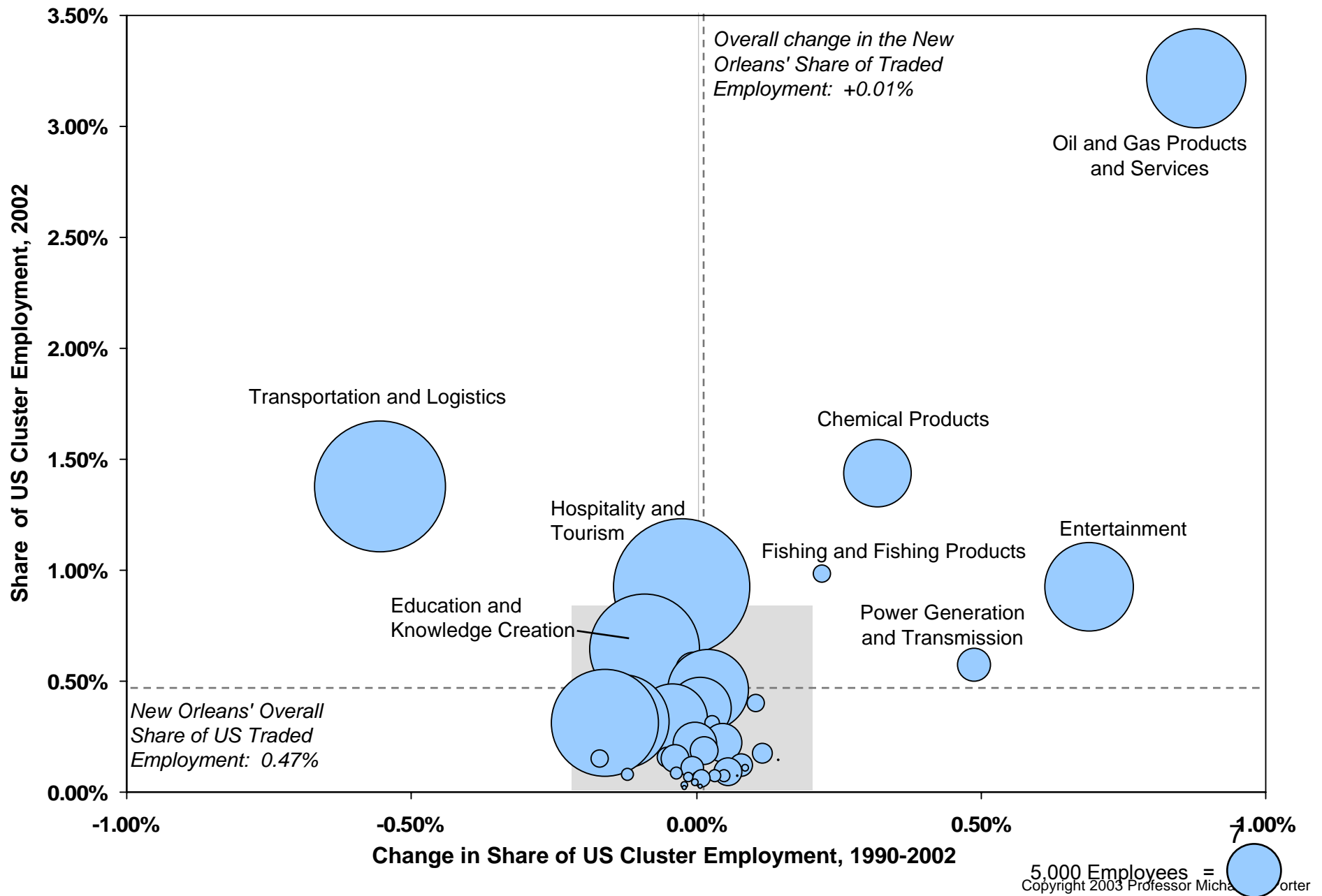
Note: 2002 data, except business bankruptcies are 2004 data and business startups are 2005 data. Inner City and Metropolitan Area are exclusive categories.

*82 inner cities (those with IC population >50,000) are ranked by highest percentage or value in each category.

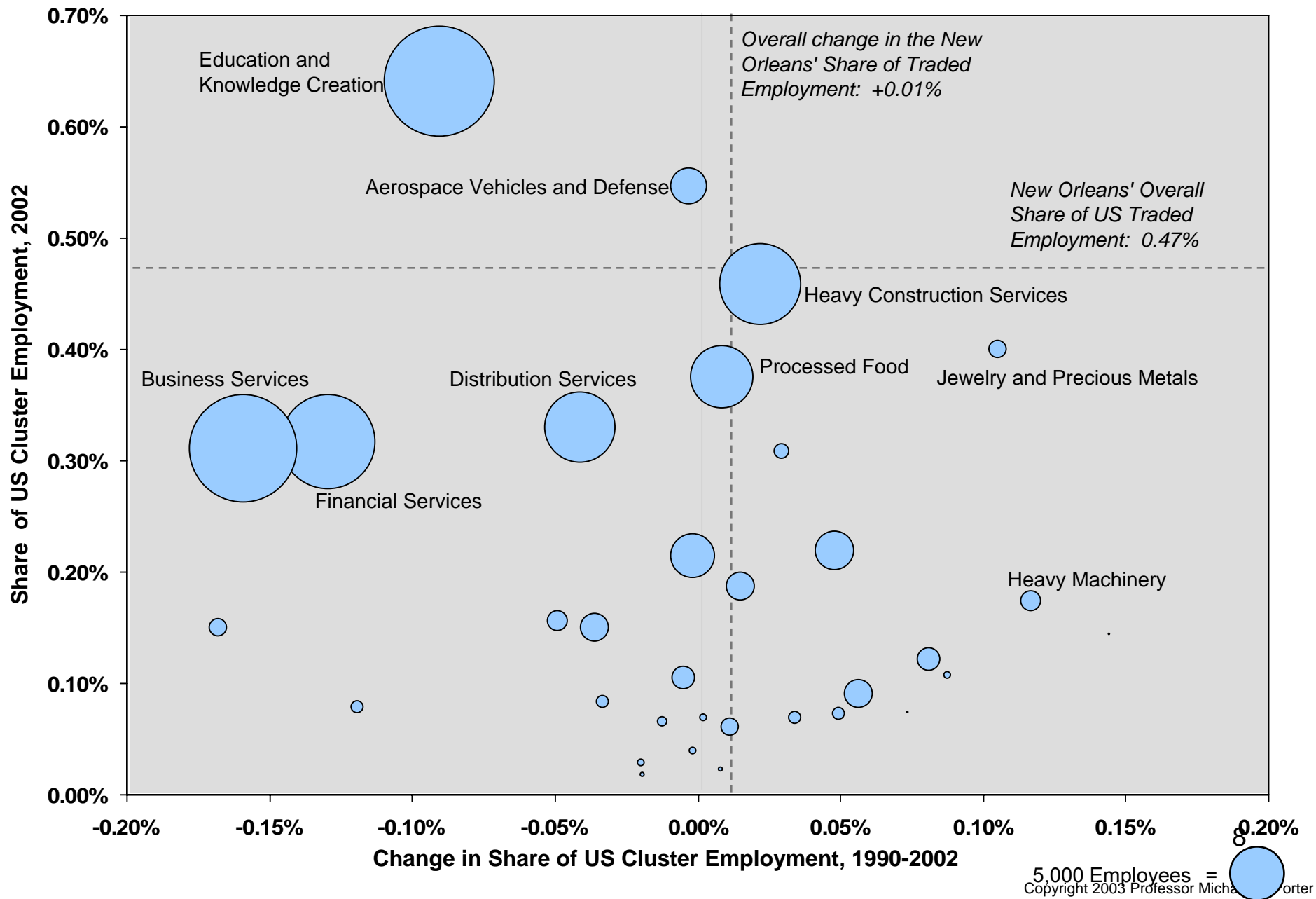
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New Orleans-Metairie-Kenner, LA Metropolitan Area Specialization by Traded Cluster, 1990-2002

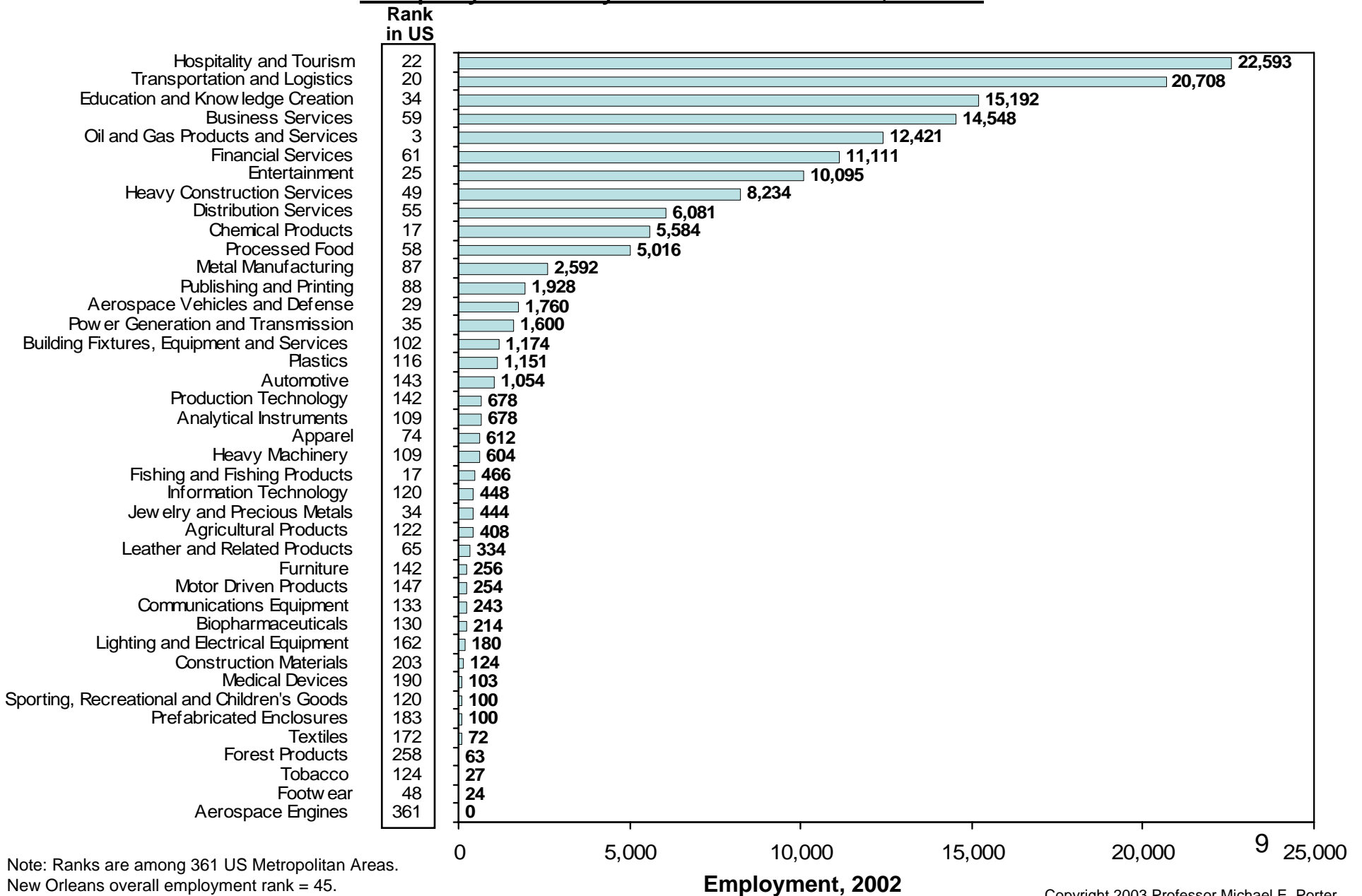


New Orleans-Metairie-Kenner, LA Metropolitan Area Specialization by Traded Cluster, 1990-2002 (continued)



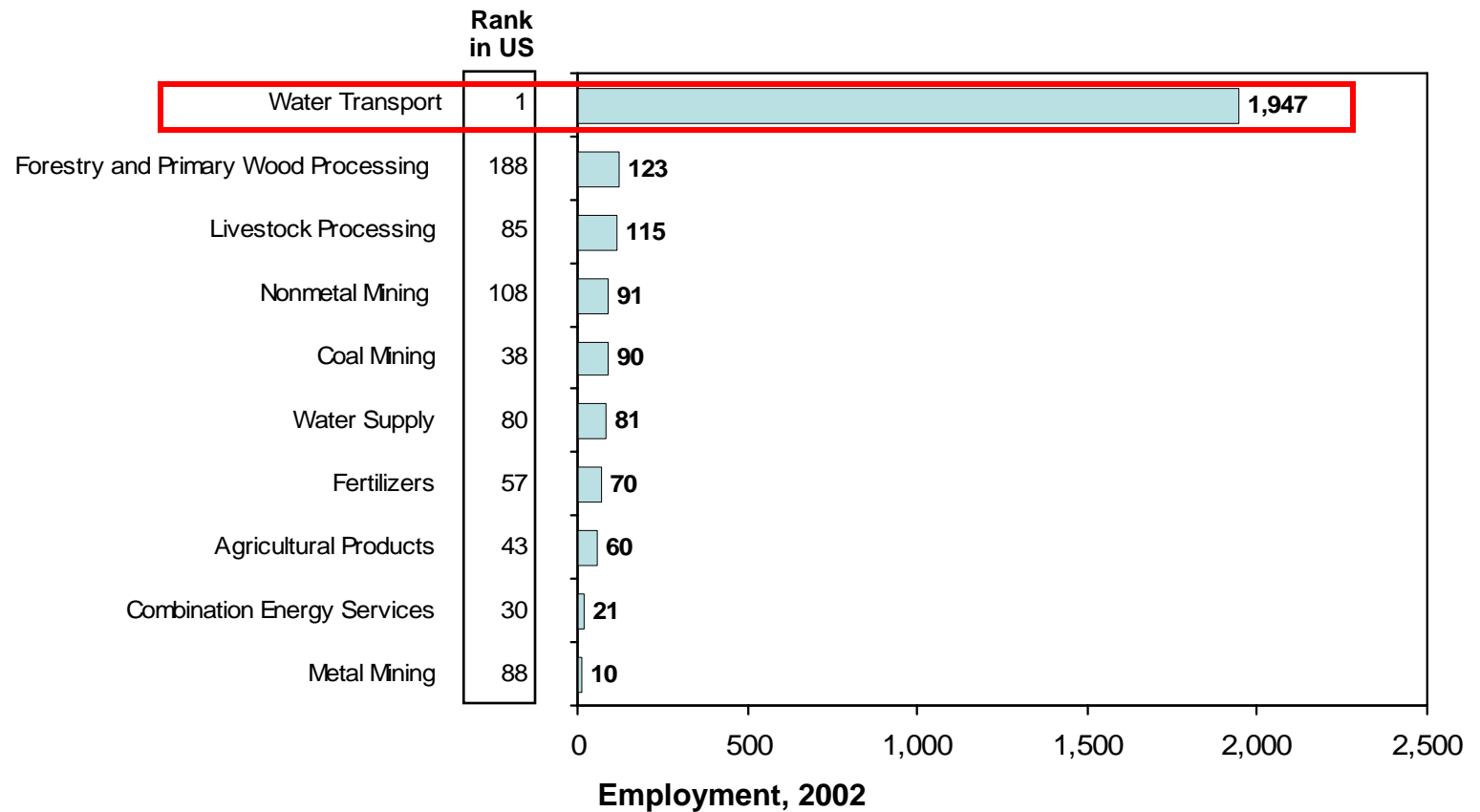
New Orleans-Metairie-Kenner, LA Metropolitan Area

Employment by Traded Cluster, 2002

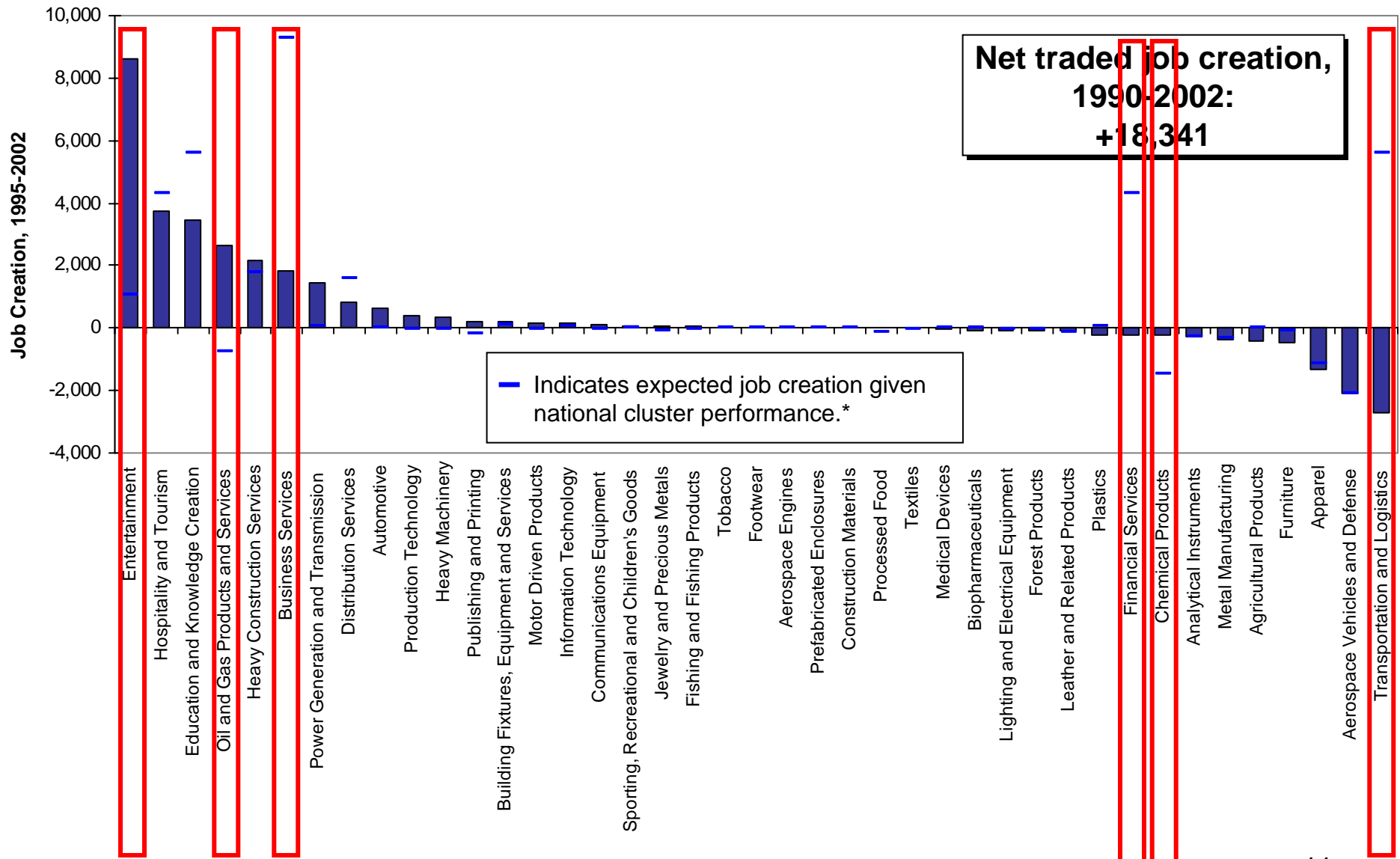


Note: Ranks are among 361 US Metropolitan Areas.
New Orleans overall employment rank = 45.

New Orleans-Metairie-Kenner, LA Metropolitan Area Employment by Natural Resource Dependent Cluster, 2002



New Orleans-Metairie-Kenner, LA Metropolitan Area Job Creation by Traded Cluster, 1990-2002

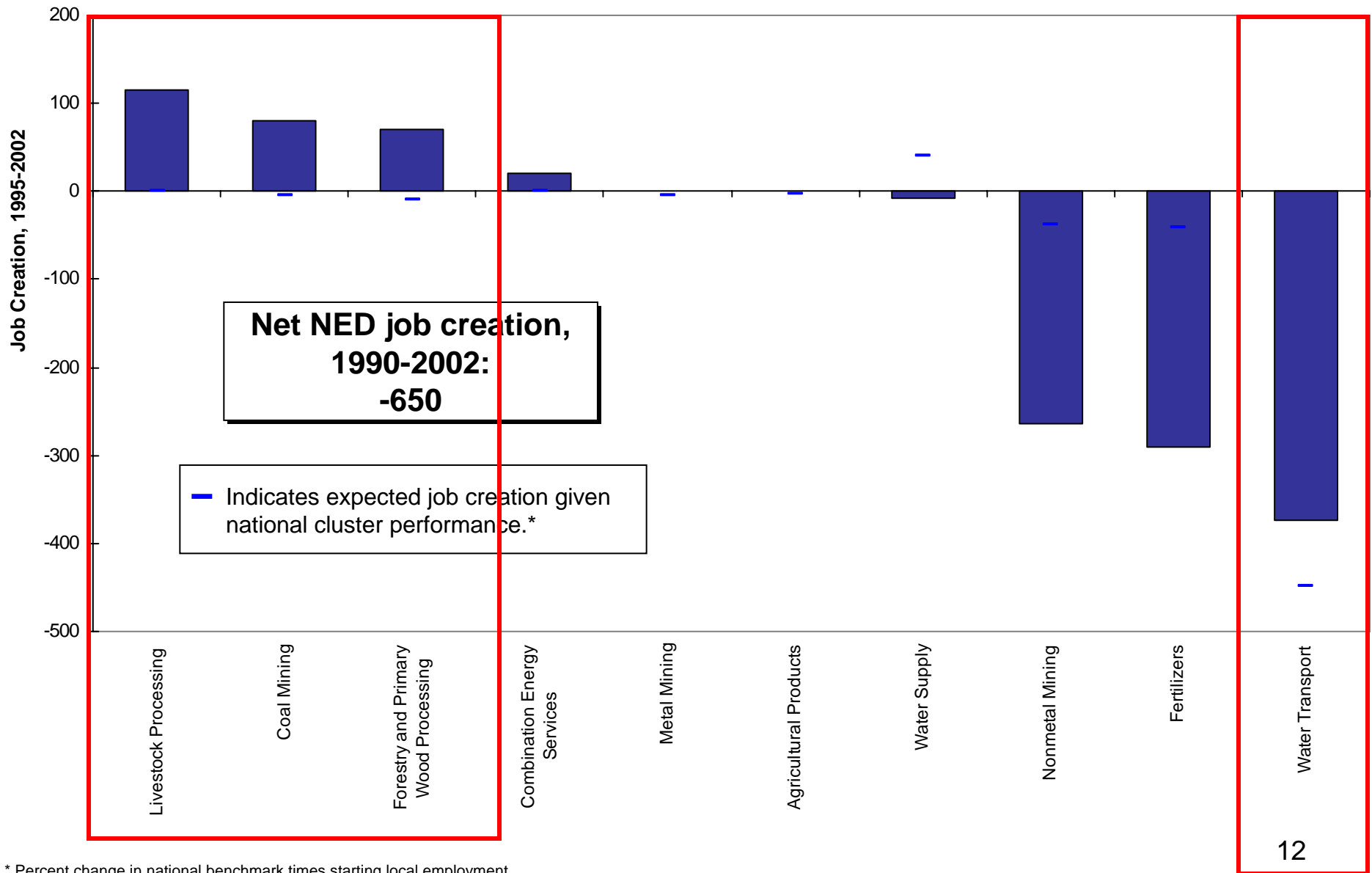


* Percent change in national benchmark times starting local employment.

Source: Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

New Orleans-Metairie-Kenner, LA Metropolitan Area

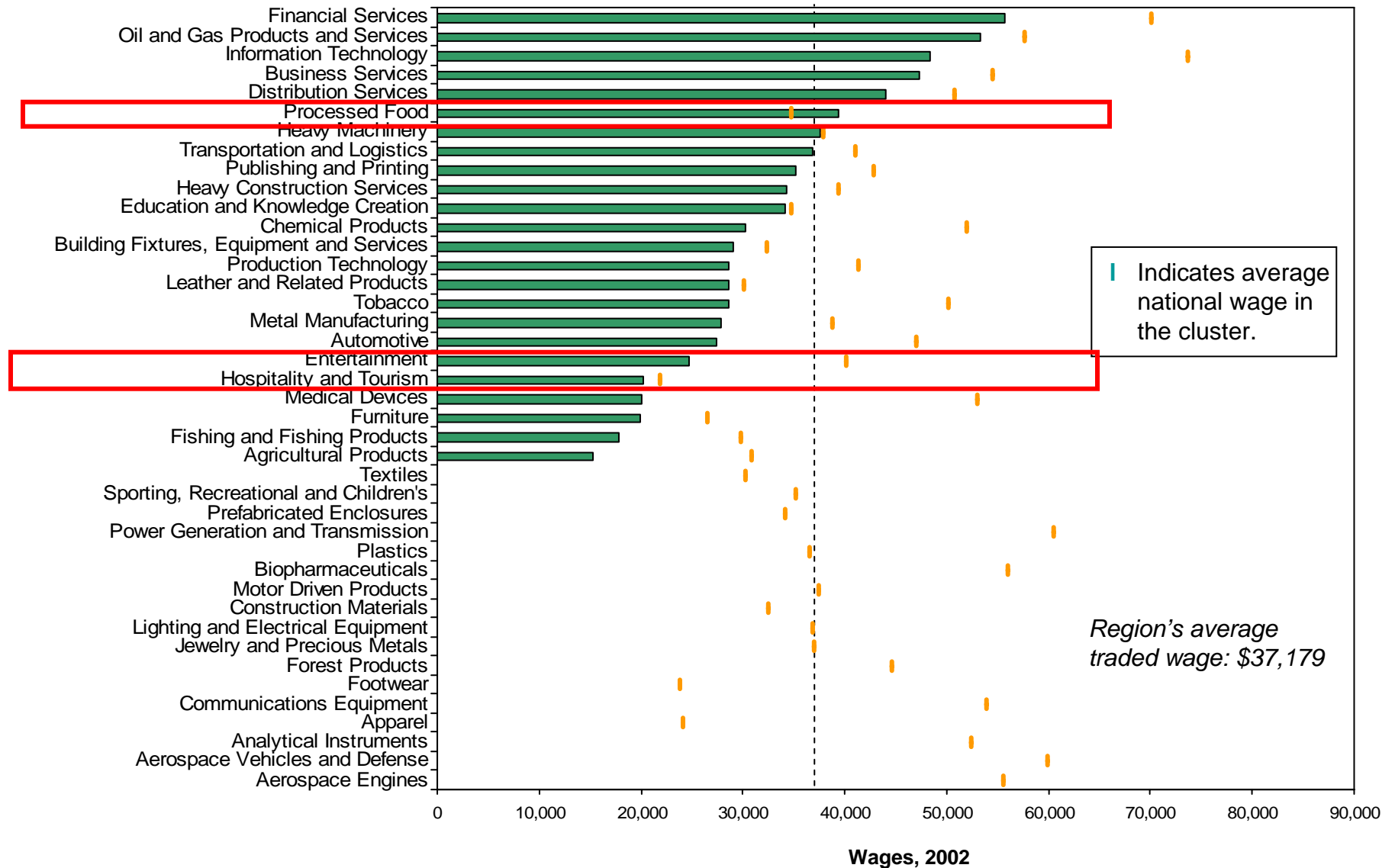
Job Creation by Natural Endowment Dependent Cluster, 1990-2002



* Percent change in national benchmark times starting local employment.

New Orleans-Metairie-Kenner, LA Metropolitan Area

Wages by Traded Cluster vs. National Benchmarks

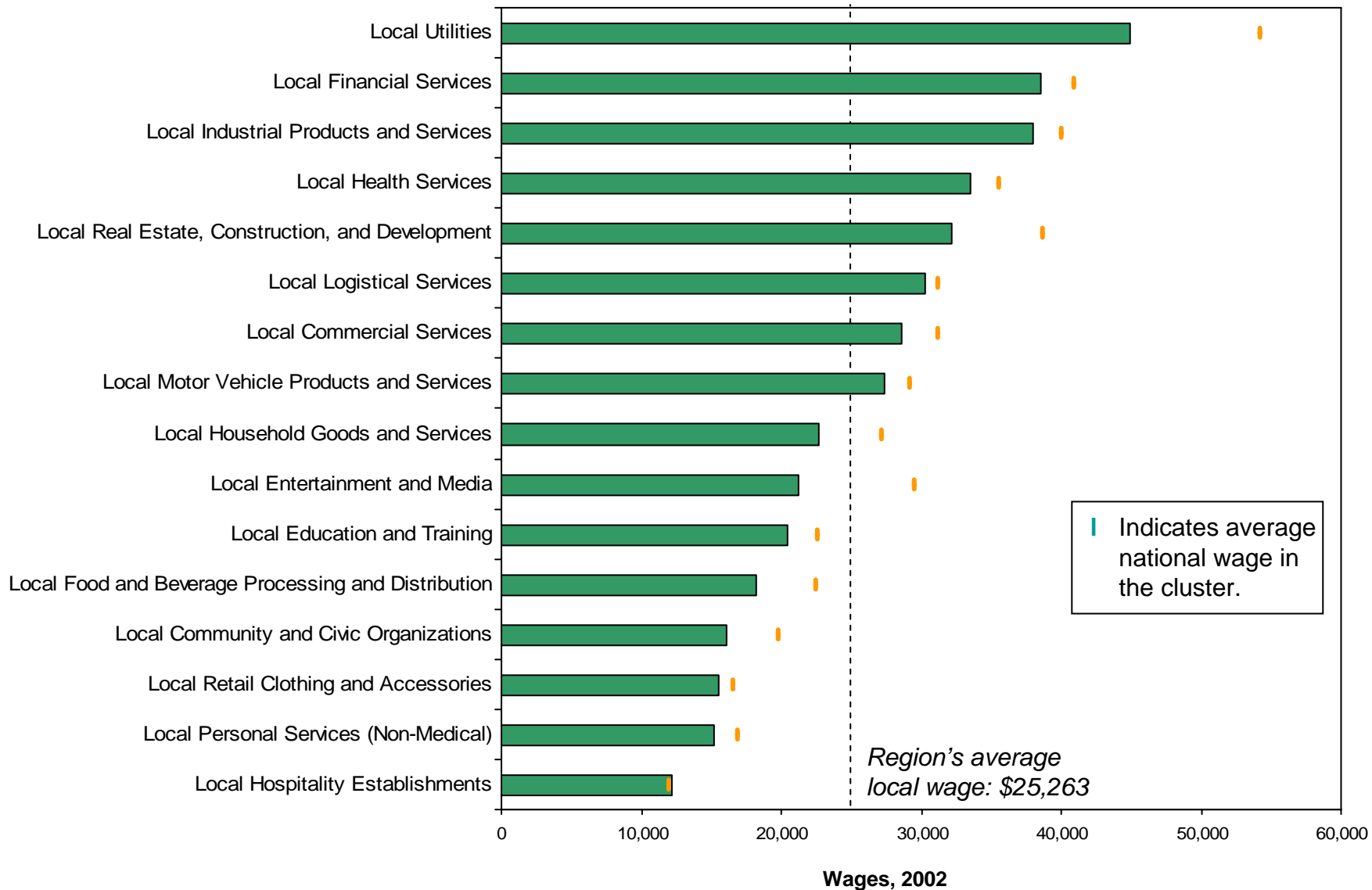


Note: Wage data not available in all cluster due to data suppression in sources.

Source: Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

New Orleans-Metairie-Kenner, LA Metropolitan Area

Wages by Local Cluster vs. National Benchmarks



New Orleans-Metairie-Kenner, LA Metropolitan Area

Patents by Organization

	Organization	Patents Issued from 1998 to 2002
1	LAITRAM CORPORATION	28
2	TULANE EDUCATIONAL FUND	25
3	LOCKHEED MARTIN CORPORATION	17
4	LOUISIANA STATE UNIVERSITY, AGRICULTURAL AND MECHANICAL COLLEGE	15
5	UNITED STATES OF AMERICA, NAVY	10
6	SANCONIX, INC.	9
7	UNITED STATES OF AMERICA, DEPARTMENT OF AGRICULTURE	8
8	SOFTEAR TECHNOLOGIES, L.L.C.	7
9	INPUT/OUTPUT, INC.	6
9	SHELL OIL COMPANY	6
9	WILCO MARSH BUGGIES & DRAGLINES, INC.	6
12	AMCOL INTERNATIONAL CORPORATION	5
12	LIFE SCIENCE HOLDINGS, INC.	5
12	UNIVERSITY OF NEW ORLEANS RESEARCH & TECHNOLOGY FOUNDATION	5
12	RATTLER TOOLS, INC.	5
12	PROVACON, INC.	5
17	HALLIBURTON ENERGY SERVICES, INC.	4
17	SHELL OFFSHORE INC.	4
17	J. RAY MCDERMOTT, S.A.	4
20	ALTON OCHSNER MEDICAL FOUNDATION	3
20	B.E. TECHNOLOGY, LLC	3
20	BIOMEASURE, INC.	3
20	UNIVERSITY OF PENNSYLVANIA	3
20	STEEL BLOCK, INC.	3
20	SCHLUMBERGER TECHNOLOGY CORPORATION	3
20	METAL FUSION, INC.	3
20	CEDARS SINAI MEDICAL CENTER	3
20	FRIEDE & GOLDMAN, LTD.	3

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THE NEW ORLEANS REGION HAS MADE GREAT STRIDES IN CREATING A STRATEGY FOR GROWTH



Strategies vary in specificity, and challenge remains to drive toward implementation.

IN MANY INDUSTRY / CLUSTER EFFORTS, AN INNER CITY AGENDA IS IMPLICIT BUT NOT EXPLICIT

ARTS & CULTURE	BIOTECH	FOOD & COMSUMER PRODUCTS	MEDICAL SERVICES	OIL & GAS
<ul style="list-style-type: none"> • MetroVision 	<ul style="list-style-type: none"> • MetroVision 	<ul style="list-style-type: none"> • MetroVision 	<ul style="list-style-type: none"> • MetroVIsion 	<ul style="list-style-type: none"> • MetroVIsion
TELECOM / E-COMMERCE	TECHNOLOGY	TOURISM & ENTERTAINMENT	TRANSPORTATION & LOGISTICS	ENVIRONMENTAL TECHNOLOGY
<ul style="list-style-type: none"> • MetroVision 	<ul style="list-style-type: none"> • JEDCO • Technology Council 	<ul style="list-style-type: none"> • JEDCO • City of New Orleans 	<ul style="list-style-type: none"> • JEDCO • CBNO • Regional Planning Commission 	<ul style="list-style-type: none"> • MetroVIsion

Other Industries Targeted for Business Attraction and Retention by MetroVision and JEDCO:

- Aerospace
- Back Office
- Converted Paper Products
- Food Processing
- Industrial Machinery
- Petroleum/petrochemicals
- Plastics
- Primary and fabricated metals
- Shipbuilding

- Strategies vary between focusing on clusters, industries, and upgrading business practices
- While there is an industry orientation, specific action strategies have yet to be developed for many of these areas due to lack of detailed knowledge about the industries

MANY ORGANIZATIONS FOCUS ON IMPROVING THE BUSINESS ENVIRONMENT

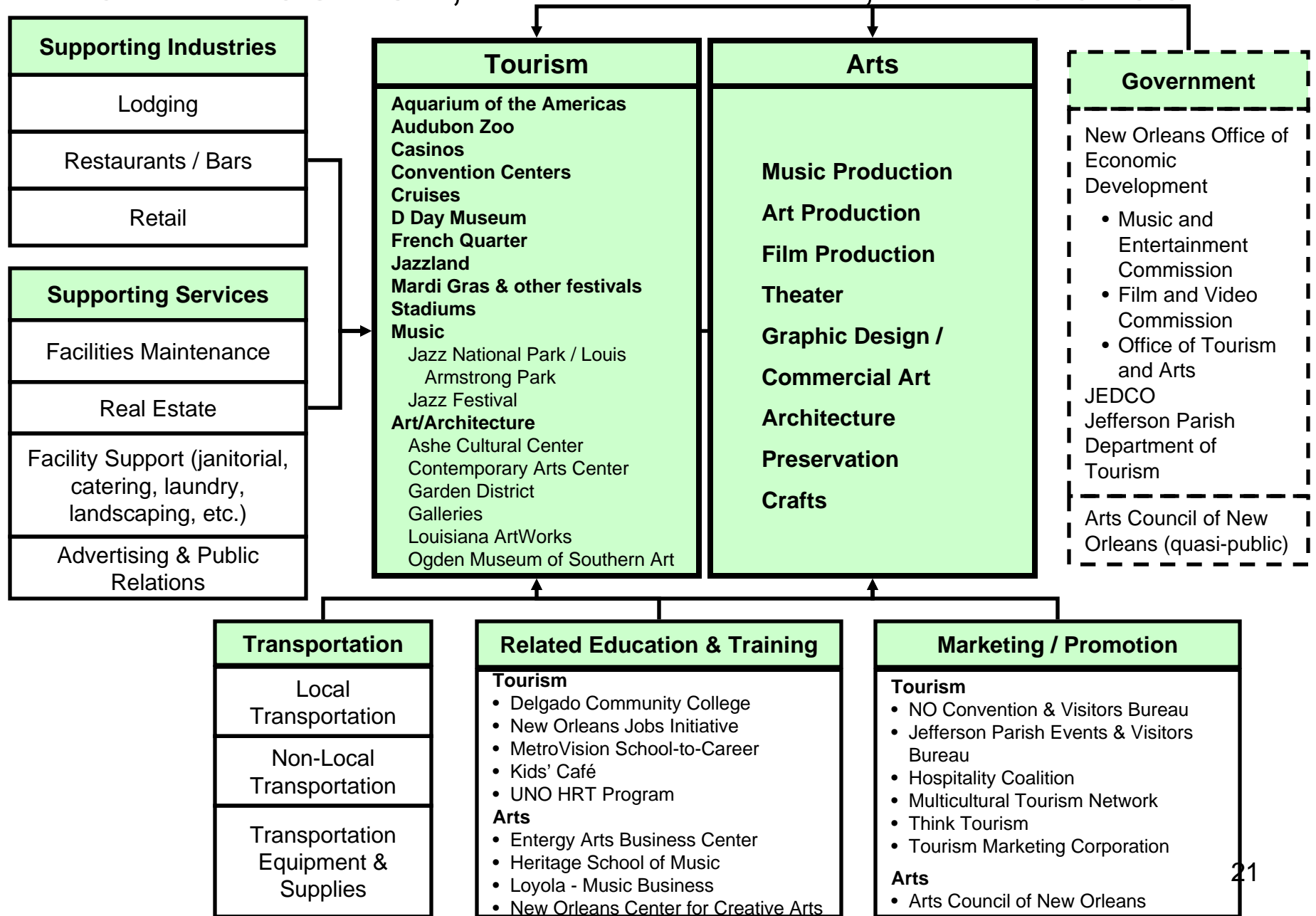
WORKFORCE	CAPITAL	LAND USE
<ul style="list-style-type: none"> • MetroVision • 4 WIBs • NOJI • Faith-based institutions 	<u>Low-cost</u> <ul style="list-style-type: none"> • JEDCO • City of NO <u>Venture</u> <ul style="list-style-type: none"> • MetroVision • Jefferson EDGE 	<ul style="list-style-type: none"> • Jefferson EDGE • NO City Planning Commission • RPC
BROWNFIELDS / URBAN BLIGHT	MINORITY BUSINESS DEVELOPMENT	SMALL BUSINESS DEVELOPMENT
<ul style="list-style-type: none"> • NO Office of Environmental Protection • Jefferson Parish cities • RPC 	<ul style="list-style-type: none"> • MetroVision • CBNO 	<ul style="list-style-type: none"> • CBNO • UNO Small Business Development Center • JEDCO
PUBLIC SAFETY	BUSINESS RETENTION	BUSINESS ATTRACTION
<ul style="list-style-type: none"> • CBNO • Faith-based institutions • NO Police Foundation 	<ul style="list-style-type: none"> • MetroVision • JEDCO • CBNO 	<ul style="list-style-type: none"> • MetroVision • NO Office of Ec. Development • JEDCO • CDCs

- **These efforts can be most effective if they are linked to cluster strategies**
- **Taking some of these efforts to scale is a challenge**

EFFORTS TO IMPROVE THE REGION'S INNER CITY AREAS ARE HAVING A POSITIVE IMPACT, BUT THERE IS MORE TO DO

Progress	Challenges
<ul style="list-style-type: none"> • Innovative efforts are underway in workforce development • New Orleans has a phenomenal base of data and research from which to build its economic development efforts • Cluster orientation and private sector involvement are heading in the right direction • Universities are a major resource and can take on an increasing role • Faith-based institutions play a critical role in communities and are beginning to take on economic development activities • Growing CDC community has made great strides in housing • Public safety and perceptions of crime have dramatically improved 	<ul style="list-style-type: none"> • Regional and parish plans have overlapping agendas that are not coordinated • Insufficient and fragmented economic development capacity at the New Orleans city level • Business leadership perceived to be risk-adverse and not fully engaged • Perception that the region has difficulty moving from plans to impact • Little traction has been made in small business development and entrepreneurship opportunities • Stalled efforts in minority business development • Resistance to regional thinking

HOW DOES INNER CITY ECONOMIC DEVELOPMENT FIT INTO THE TOURISM, ENTERTAINMENT, & ARTS CLUSTER?



POTENTIAL OPPORTUNITIES FOR GROWTH IN TOURISM, ENTERTAINMENT, & THE ARTS

Potential Opportunities	What We're Hearing: A Range of Opinions
<p><u>Core cluster</u></p> <ul style="list-style-type: none"> • Expansion of an entertainment and cultural production industry, a la Nashville (recording studios, sound stage, etc.) • Development of historical and cultural destinations in New Orleans neighborhoods • Further develop tourism opportunities related to the river <p><u>Related opportunities</u></p> <ul style="list-style-type: none"> • Growth and development of commercial services companies that serve entertainment and hospitality venues • Construction of convention center's next phase, new hotels, etc. • Jobs and career track development in the hospitality sector 	<ul style="list-style-type: none"> • "Tourism: that's our factory, and it's humming!" • "This city could grow like crazy in the production side of the entertainment industry." • "This city's biggest raw material is talent." • "The name of the game we're playing has changed. It used to be 'Get people here,' now it's 'Spread the benefits, spread the burden.'" • "New Orleans is the best place in America to create your art, but you can't sell it." • "We have not yet topped out on tourism, but that's not really what we are looking for." • "[Tourism] is the strongest opportunity because it's there." • "It's been impossible for minority businesses to break into the lucrative tourism business."

POTENTIAL OPPORTUNITIES FOR GROWTH IN HEALTH CARE

Strong Cluster Presence	
<ul style="list-style-type: none"> • 22 hospitals in the region, 8 in the City of New Orleans • 2 medical schools in the region • Over \$50 million in research grants from NIH, private foundations, and industry • Biotech initiative with joint effort between LSU and Tulane Medical Schools 	
Potential Opportunities	What We're Hearing
<ul style="list-style-type: none"> • Significant workforce opportunities for nurses, technicians, and other fields • Consolidating and outsourcing supplier opportunities • Long-term opportunities as a result of R&D investments • Home health care providers to support aging population 	<ul style="list-style-type: none"> • “There are opportunities to outsource some of the hospitals’ non-core activities.” • “We need to expand outreach at the high school level and have scholarships available at the university level.” • “There should be more effort put toward demystifying the jobs that are available – some relatively high-wage jobs with benefits are available right now.”

LEADERS OBSERVE MANY CHALLENGES TO PROGRESS...

- **Racial Issues**

“New Orleans is twenty years behind in terms of relations between the [black and white] communities.”

- **New Orleans is Set in Old Ways**

“People are not open to change.”

“The attitude is: ‘We’ve always been doing it this way.’”

“New Orleans is a closed society.”

- **Lack of Risk-Taking**

“Planning takes a back seat to reacting.”

...BUT CHANGE CAN HAPPEN THROUGH STRATEGIC ACTION AND A NEW MINDSET

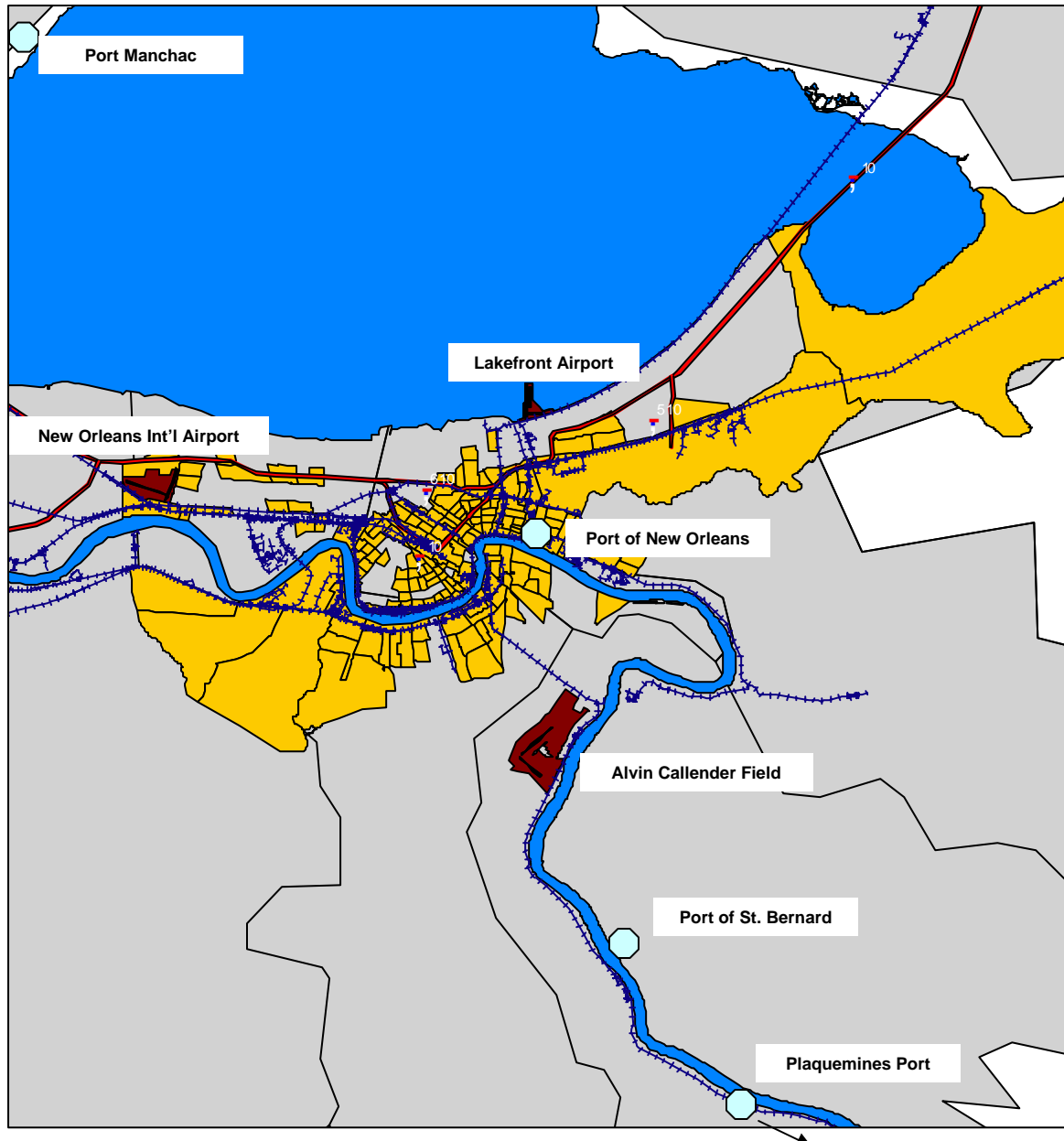
- “Is it doable? Absolutely. You can change people’s minds.”
- “I think people are ready to listen to ideas that make sense....We have study after study, but not many blueprints for what to do.”
- “We have to have an action plan so I can prove the cynics wrong.”

–New Orleans business leaders

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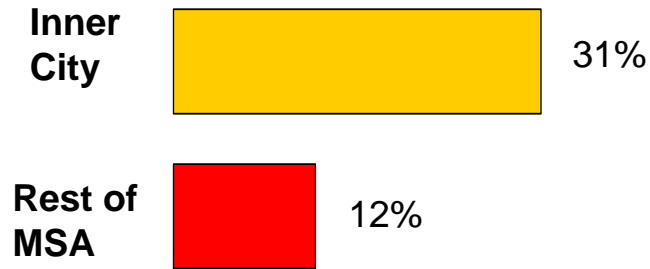
The Inner City is Strategically Located with Port and Intermodal Activity



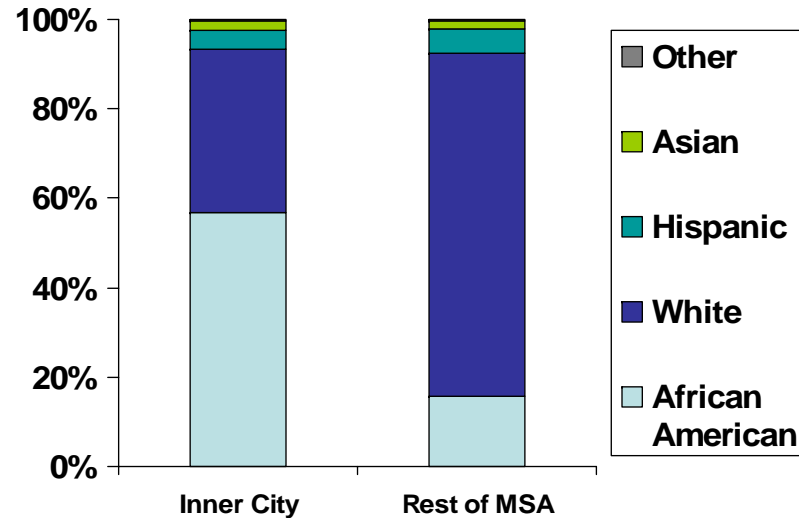
- **Despite losses to Galveston, TX and Miami, FL, New Orleans ports maintain a significant share of national imports**
 - Largest market share in steel, natural rubber, plywood, and coffee
- **Port has invested nearly \$500 million in expansion and new facilities in past decade.**
- **Ports drive a significant intermodal transportation network**
 - Six class one railroads
 - 70 steamship lines, 16 barge lines, and 75 truck lines
 - Four interstate highways: I-10, I-12, I-55, and I-59
- **Significant trucking / logistics presence in and near inner city**
- **Demand for just-in-time delivery creates base of companies near intermodal facilities**
- **Impact of the proposed Millenium Port is unclear for the inner city**

NEW ORLEANS' INNER CITY SUFFERS FROM HIGH POVERTY RATES COMPARED TO THE REST OF THE MSA

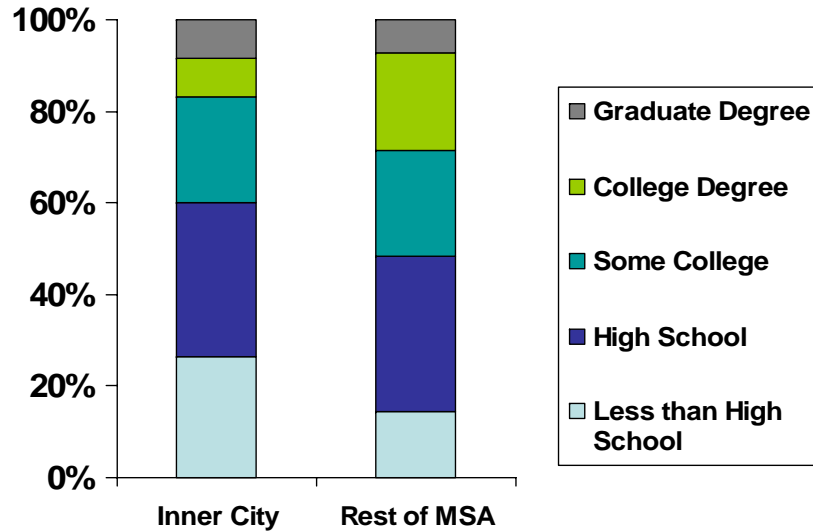
Poverty



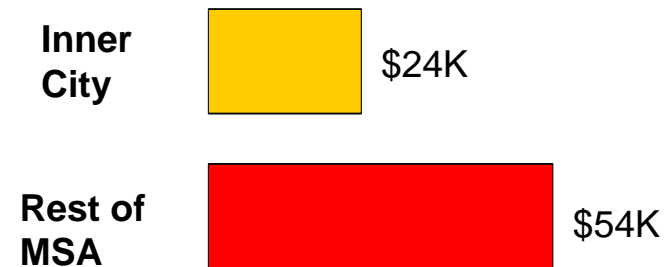
Population by Race



Educational Attainment



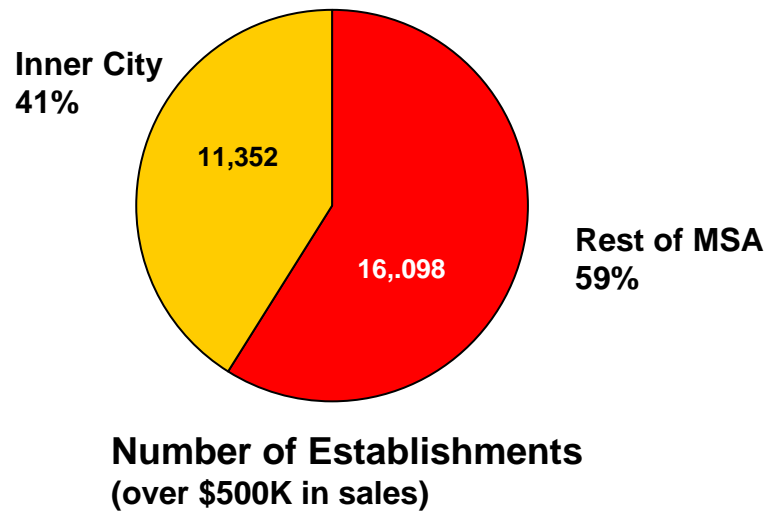
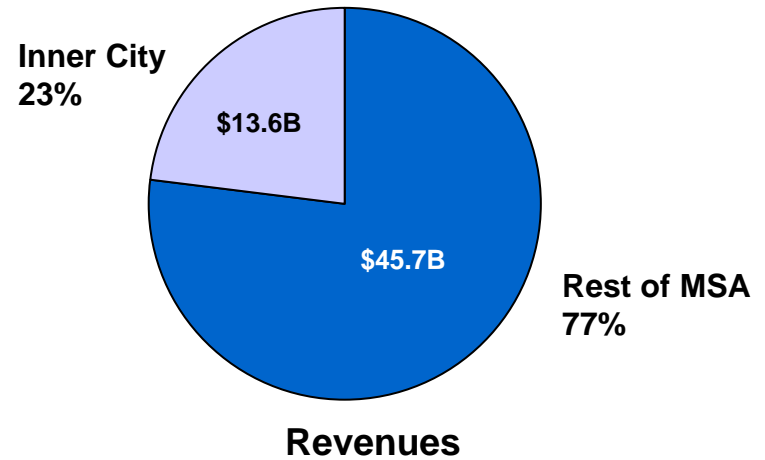
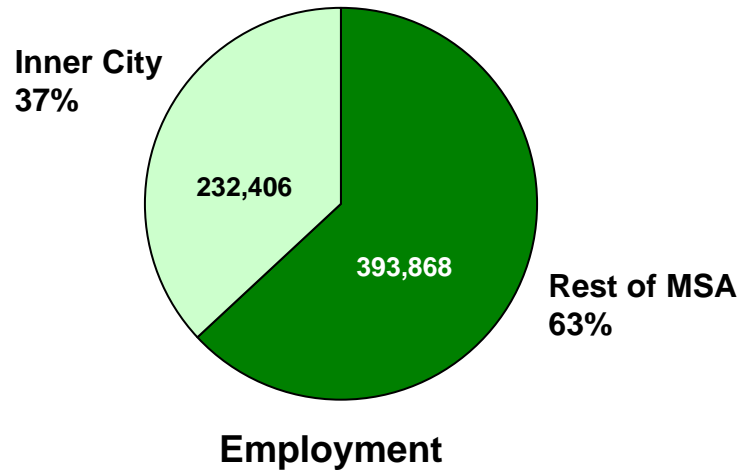
Median Household Income



Notes: MHI estimated based on weighted average of census tracts' MHI. Poverty estimated as percentage of households with less than \$15K income. Educational attainment accounts for people above the age of 25.

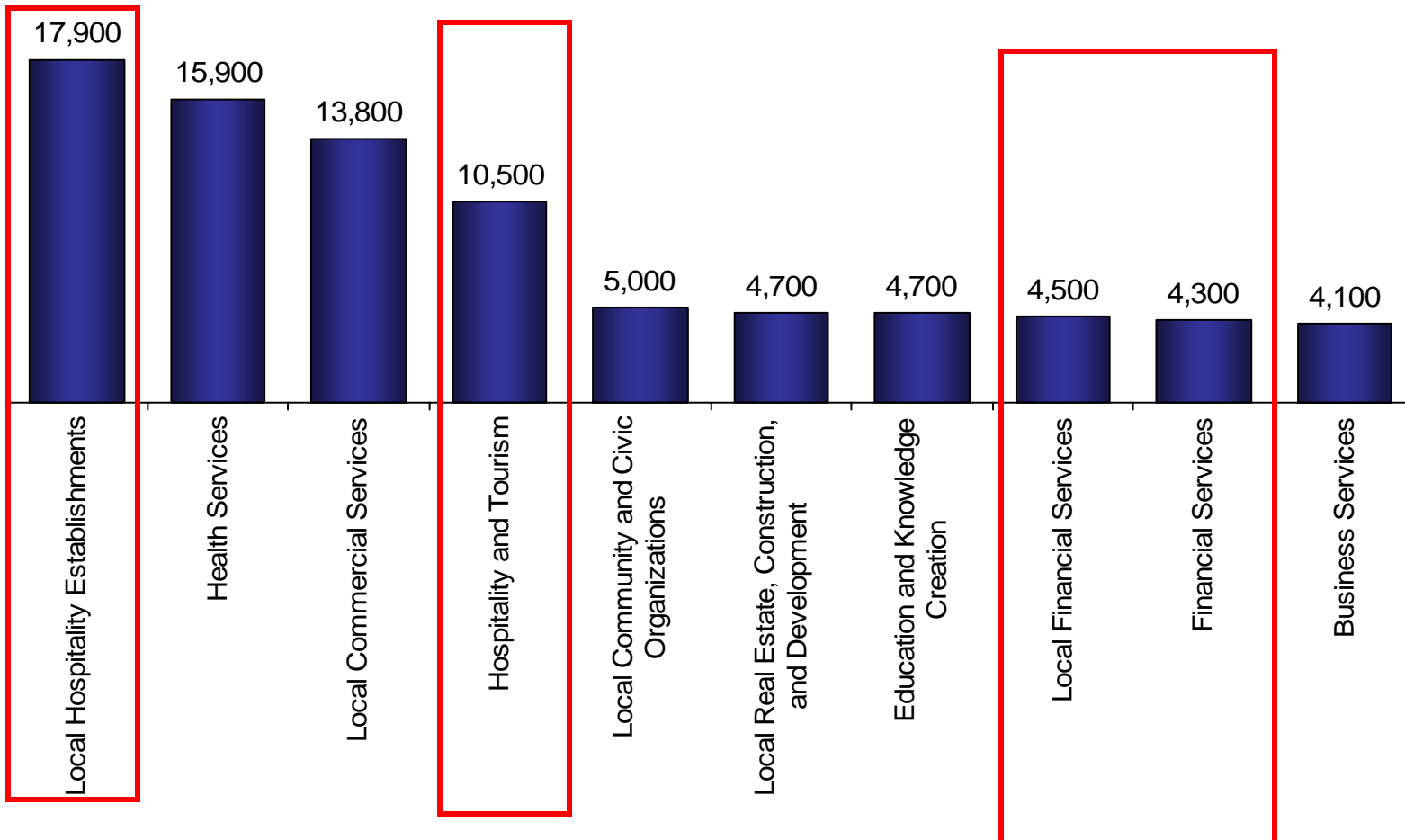
Source: Geolytics, 1999 (poverty, MHI), Easy Analytics Solutions Inc. 2000 (educ., race)

THE INNER CITY GENERATES A SIGNIFICANT PORTION OF THE REGION'S BUSINESS ACTIVITY

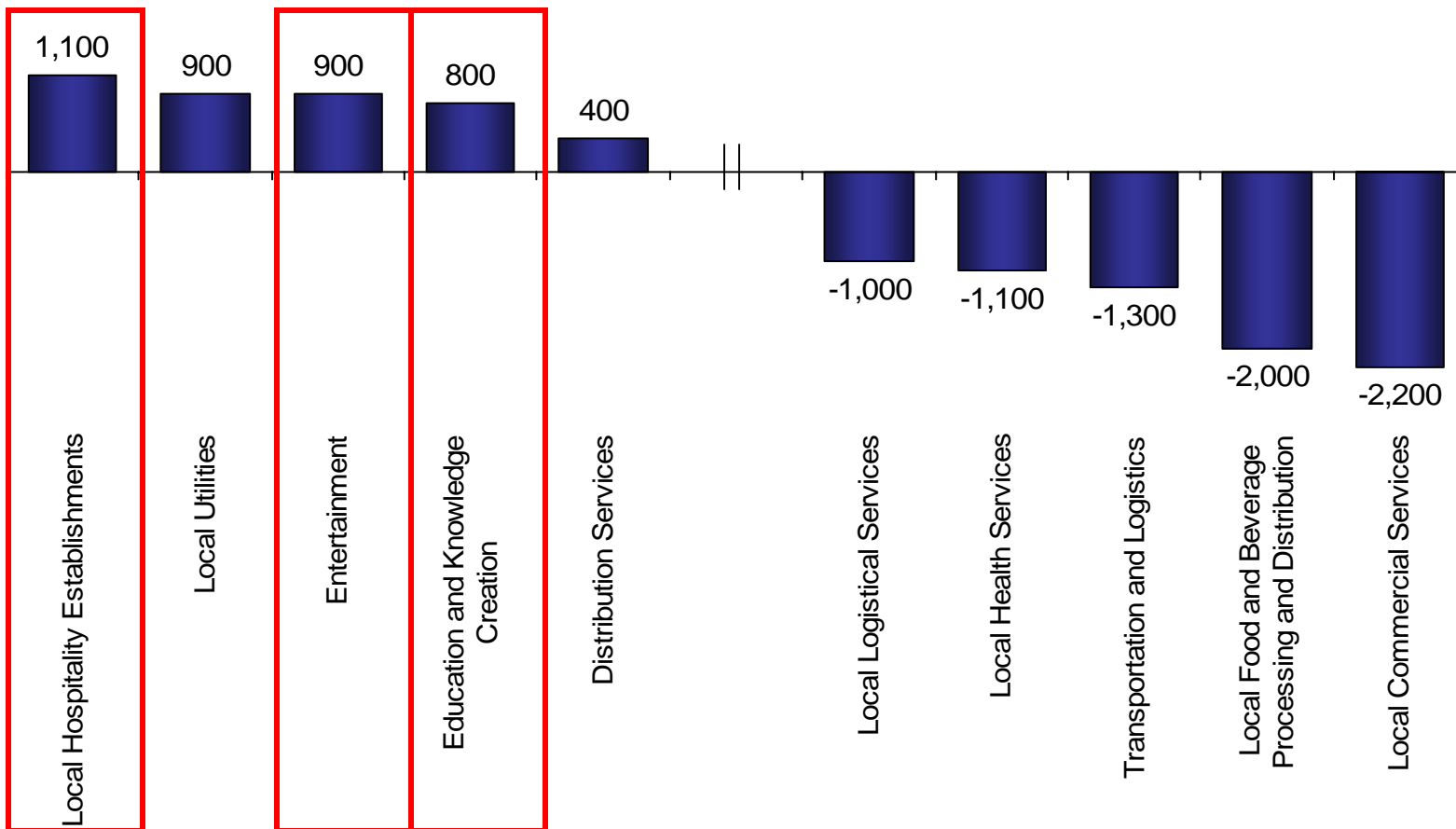


Largest Employers

Inner City New Orleans, 2002 (August 2005¹)



Largest Job Gainers and Losers Inner City New Orleans, 1998-2002 (August 2005¹)



Retail Spending

(August 2005¹)

Inner city New Orleans' 283,000 residents spend roughly \$2 billion each year on retail goods, with food and clothing comprising half of the total retail expenditure

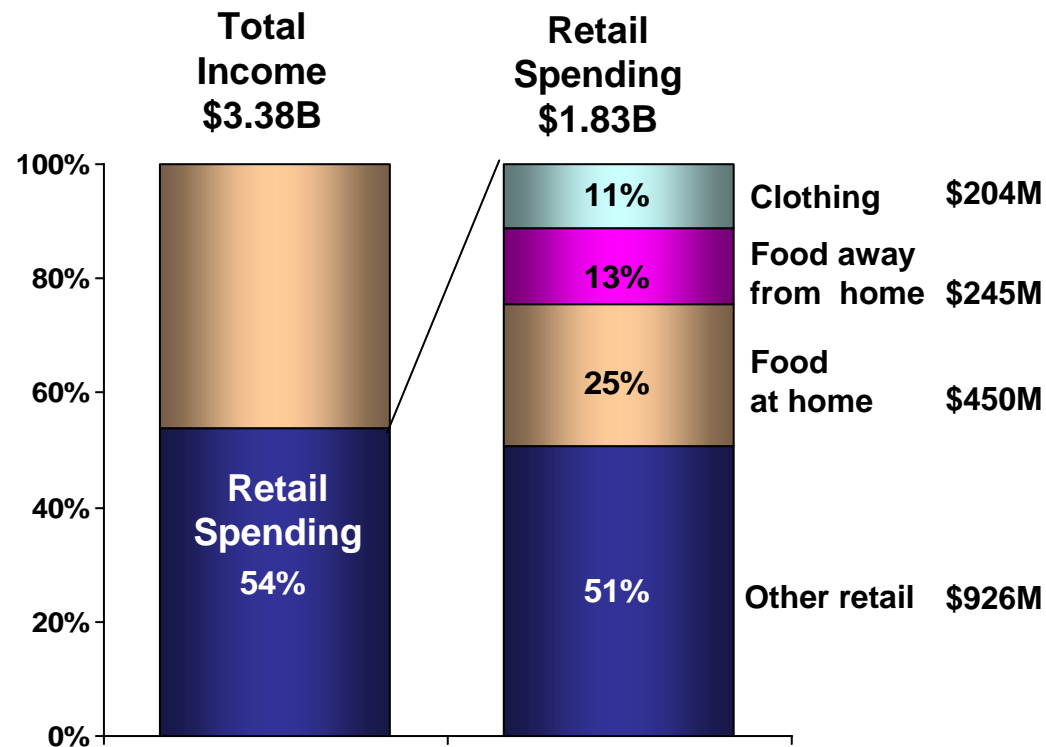


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Port Underperformance Abstract



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Collective action regimes in seaport clusters: the case of the Lower Mississippi port cluster

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9 Abstract

10 This paper analyses the competitiveness of the Lower Mississippi seaport from a cluster perspective, discussing the importance of
11 local governance and collective action regimes for the competitiveness of the cluster. The case study of the Lower Mississippi port
12 cluster shows that collective action regimes are relatively poorly developed in this cluster, compared with the seaport cluster of
13 Rotterdam. Furthermore, the case shows these ineffective regimes are one of the reasons explaining the declining market share in
14 overall throughput in the Gulf region of the port cluster. Houston, especially its nearest and main competitor, has grown much more
15 than the Lower Mississippi port cluster. A number of collective action problems require effective collective action regimes that
16 render significant benefits at the cluster level. Several proposals are formulated to improve the quality of the collective action regimes
17 and hence enhance the performance of the Lower Mississippi port cluster.

18 © 2004 Published by Elsevier Ltd.

19 *Keywords:* Seaports; Clusters; Mississippi; Governance; Collection action problems; Collective action regimes

Port Underperformance

Key Points

- Lower Mississippi Port Cluster (12 counties surrounding New Orleans) has lost U.S. market share, though by throughput volume it remains the largest in the world
 - **Overall market share fell from 18% to 17%** while Houston gained from 6% to 8%, 1990 - 2001
 - In container traffic, LMPC volume stayed constant 1980 – 2001 while U.S. volume almost quadrupled; **LMPC share of Gulf Coast container traffic fell from 48% to 15%**
- Authors attribute this to fragmentation of the five port authorities and lack of firm leadership and cooperation
 - Underinvestment by Port Authorities in activities that benefit other ports (free-rider problem)
 - Duplication of similar port facilities and spatial misallocation of investment in facilities
- This has resulted in inadequate collective cluster activity:
 - There is little **training or education** for port-related jobs, esp. higher-value added ones. 'Brain jobs' fled to Houston and St. Louis, where the shipping periodical is published. In 2000, effort was made to start a Master's program, but failed due to lack of interest from business community
 - **Innovation:** No cooperative efforts and insufficient individual efforts
 - **Marketing, promotion, and market intelligence:** Activity is fragmented between authorities, though some efforts at consolidation have taken place; inadequate involvement of local industry associations
 - **Inland access:** Railroad access is inadequate, though road and river barge access (except for containers) is good)
 - **Internationalization** (as most U.S. shipping traffic enters East and West Coasts, LMPC needs to better focus on niche Latin American market)
- LMPC is missing opportunities to bolster the regional economy by attracting high value-added related and supporting industries through better cluster coordination

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Traded Clusters and Subclusters in the US Economy

Aerospace Engines Aircraft Engines Precision Metal Products	Chemical Products Intermediate Chemicals and Gases Packaged Chemical Products Other Processed Chemicals Refractories Leather Tanning and Finishing Ammunition Special Packaging Treated Garments	Furniture Furniture Wood Materials and Products Furnishings Tableware and Kitchenware	Metal Manufacturing Fabricated Metal Products Metal Alloys Primary Metal Products Precision Metal Products Fasteners Wire and Springs Metal Processing Iron and Steel Mills and Foundries Nonferrous Mills and Foundries Metal Furniture Environmental Controls Pumps Saw Blades and Handsaws General Industrial Machinery Laundry and Cleaning Equipment Metal Armaments	Processed Food Milk and Frozen Desserts Baked Packaged Foods Coffee Processed Dairy and Related Products Meat and Related Products and Services Flour Specialty Foods and Ingredients Milling Candy and Chocolate Malt Beverages Distilled and Blended Liquors Paper Containers and Boxes Metal and Glass Containers Food Products Machinery
Aerospace Vehicles and Defense Aircraft Missiles and Space Vehicles Defense Equipment	Communications Equipment Communications Equipment Electrical and Electronic Components Specialty Office Machines	Heavy Construction Services Final Construction Subcontractors Primary Construction Materials Ceramic Tile Equipment Distribution and Wholesaling Fabricated Metal Structures and Piping Explosives	Motor Driven Products Motors and Generators Batteries Motorized Equipment Refrigeration and Heating Equipment Appliances Specialized Pumps Specialized Machinery Tires and Inner Tubes	Production Technology Machine Tools and Accessories Process Equipment Sub-systems and Components Hoists and Cranes Process Machinery Industrial Patterns Fabricated Plate Work Industrial Trucks and Tractors Ball and Roller Bearings
Agricultural Products Farm Management and Related Services Soil Preparation Services Irrigation Systems Packaging Fertilizers Agricultural Products Wine and Brandy Cigars Milling and Refining	Construction Materials Tile, Brick and Glass Plumbing Fixtures Wood Products Cut and Crushed Stone Gum and Wood Chemicals Rubber Products	Heavy Machinery Construction Machinery Farm Machinery Railroad Equipment and Rental Mining Machinery Machinery Components Valves and Pipe Fittings	Oil and Gas Products and Services Oil and Gas Machinery Hydrocarbons Oil and Gas Exploration and Drilling Oil Pipelines Petroleum Processing Oil and Gas Trading Water Freight Transportation Services	Publishing and Printing Publishing News Syndicates Signs and Advertising Specialties Photographic Services Photographic Equipment and Supplies Radio, TV, Publisher Representatives Printing Services Printing Inputs Paper Products Specialty Paper Products Inked Paper and Ribbons Office Equipment and Supplies
Analytical Instruments Laboratory Instruments Optical Instruments Process Instruments Search and Navigation Equipment Electronic Components	Distribution Services Merchandise Wholesaling Apparel and Accessories Wholesaling Catalog and Mail-order Food Products Wholesaling Farm Material and Supplies Wholesaling Transportation Vehicle and Equipment Distribution	Hospitality and Tourism Tourism Attractions Tourism Related Services Water Passenger Transportation Accommodations and Related Services Boat Related Services Ground Transportation	Plastics Plastic Materials and Resins Plastic Products Paint and Allied Products Synthetic Rubber	Sporting, Recreational and Children's Good Sporting and Athletic Goods Games, Toys, and Children's Vehicles Motorcycles and Bicycles
Apparel Men's Clothing Women's and Children's Clothing Hosiery and Other Garments Accessories Knitting and Finishing Mills	Education and Knowledge Creation Educational Institutions Research Organizations Educational Facilities Patent Owners and Lessors Supplies	Information Technology Computers Electronic Component and Assemblies Peripherals Software Communications Services	Power Generation and Transmission Electric Services Turbines and Turbine Generators Transformers Porcelain, Carbon and Graphite Components Electronic Capacitors	Textiles Fabric Mills Specialty Fabric Mills Specialty Fabric Processing Textile Machinery Yarn and Thread Mills Carpets and Rugs Wool Mills Fibers Finishing Plants Specialty Apparel Components Women's and Children's Underwear Tire Cord and Fabrics
Automotive Motor Vehicles Automotive Parts Automotive Components Forgings and Stampings Flat Glass Production Equipment Small Vehicles and Trailers	Entertainment Video Production and Distribution Recorded Products Entertainment Equipment Entertainment Related Services Entertainment Venues	Jewelry and Precious Metals Jewelry and Precious Metal Products Costume Jewelry Cutlery Collectibles	Prefabricated Enclosures Recreational Vehicles and Parts Mobile Homes Trucks and Trailers Caskets Elevators and Moving Stairways Office Furniture Household Refrigerators and Freezers Aluminum Processing	Tobacco Cigarettes Other Tobacco Products Tobacco Processing Specialty Packaging
Biopharmaceuticals Biopharmaceutical Products Health and Beauty Products Containers	Financial Services Depository Institutions Securities Brokers, Dealers and Exchanges Insurance Products Health Plans Risk Capital Providers Investment Funds Real Estate Investment Trusts Passenger Car Leasing	Leather and Related Products Leather products Fur Goods Coated Fabrics Related Products Accessories	Lighting and Electrical Equipment Lighting Fixtures Electric Lamps Batteries Switchgear Electrical Parts Metal Parts	Transportation and Logistics Air Transportation Bus Transportation Marine Transportation Ship Building Transportation Arrangement and Warehousing Trucking Terminal Airports
Building Fixtures, Equipment and Services Plumbing Products Drapery Hardware Fabricated Materials Heating and Lighting Furniture and Fittings Clay and Vitreous Products Floor Coverings Steam and Air-conditioning Stone and Tile Work Wood Cabinets, Fixtures and Other Products Concrete, Gypsum and Other Building Products	Fishing and Fishing Products Fish Products Fishing and Hunting Processed Seafoods	Medical Devices Surgical Instruments and Supplies Dental Instrument and Supplies Ophthalmic Goods Medical Equipment Diagnostic Substances Biological Products		
Business Services Management Consulting Online Information Services Computer Services Computer Programming Photocopying Marketing Related Services Professional Organizations and Services Engineering Services Laundry Services Facilities Support Services	Footwear Footwear Specialty Footwear Footwear Parts			
	Forest Products Paper Products Paper Mills Paper Industries Machinery Prefabricated Wood Buildings Wood Partitions and Fixtures			

Source: Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School