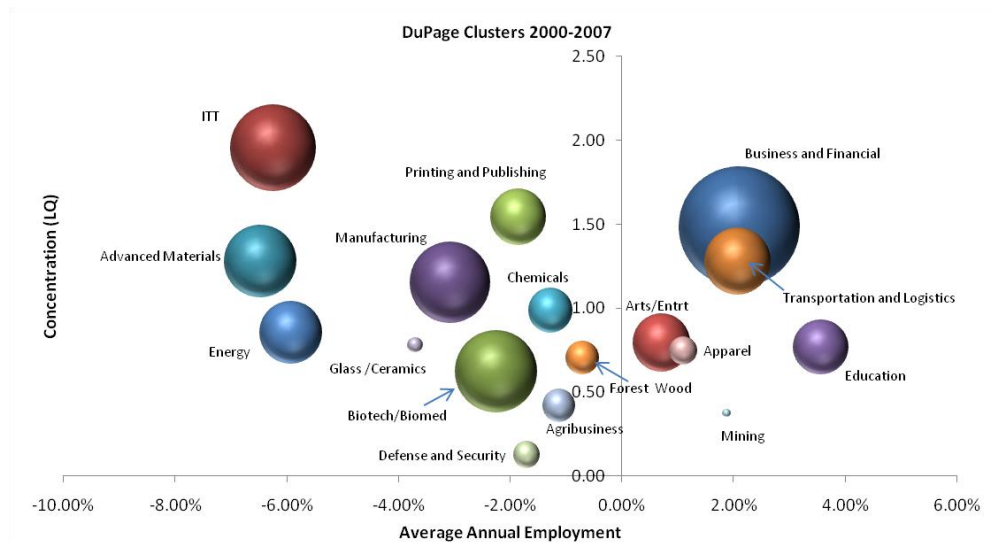




DuPage County Economic Development Cluster Report

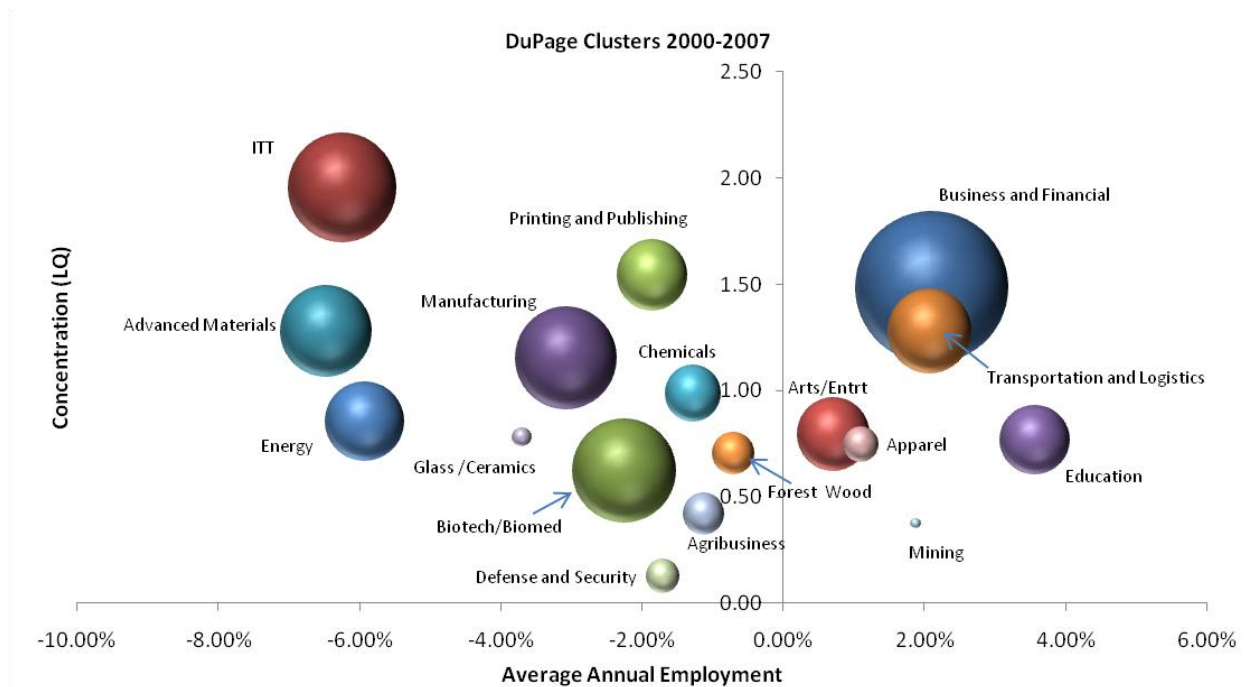


Industry Cluster Report Prepared for Choose DuPage

Summary

An initial analysis of industry cluster analysis identified emerging, leading, and maturing clusters in DuPage County. Highlights from that analysis found that the Business & Financial cluster and Transportation & Logistics are leading industry clusters in the county. The Business and Financial cluster provides a significant number of jobs and had average employment growth over 2% from 2000 to 2007. The county has several emerging clusters including Education, Arts and Entertainment, and Apparel and Textiles. Education and Knowledge Creation had significant growth over the seven year period (3.46%). Information Technology & Telcom is the second largest cluster in the county and is heavily concentrated in the county (1.95). Similarly, Advanced Materials, Manufacturing, and Printing & Publishing are considered mature clusters because although they are heavily concentrated in the county they did experience job loss over the study period.

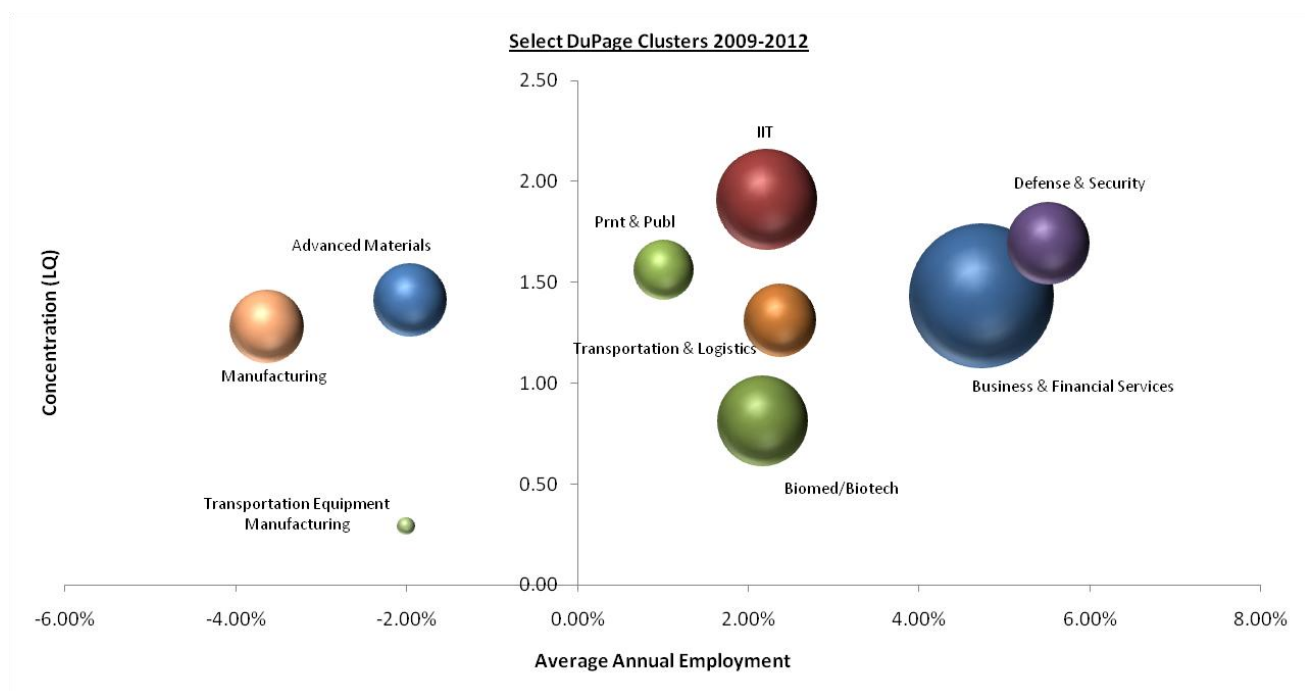
The purpose of this report is to provide detailed information on clusters chosen by Choose DuPage in order to build information on industries.



The clusters chosen for analysis include: Advanced Materials (pg 4-7), Transportation Equipment Manufacturing (pg 8-9), Business & Financial Services (pg 10-12), Information Technology & Telecommunications (13-15), Biomedical/Biotechnology (Life Sciences) (pg 16-18), Transportation & Logistics (pg 19-21), Manufacturing (pg 22-25), Printing & Publishing (pg 26-28), and Defense & Security (pg 29-30).

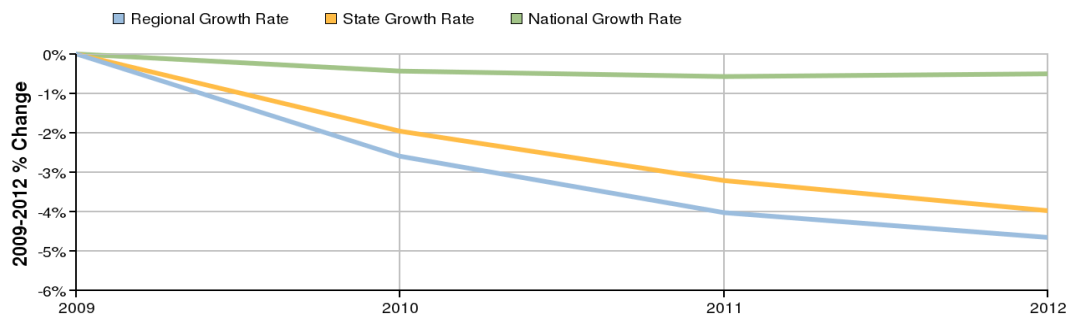
The report is divided into two sections. The first section provides detailed analysis for each cluster identifying the industries within a particular cluster as leading, emerging, or mature based off of three benchmarks (employment growth, concentration, and wage). The second section is an asset map that highlights the industrial base, human capital, financial capital, and infrastructure available in the County. Since clusters are linked through the buyer-supplier relationship, they share common resources and technologies, depend on similar labor pool and institutions and on special infrastructure.

Three benchmarks are used to identify industries that may have a competitive advantage: a high employment concentration (referred to as a location quotient); high wage levels; and fast employment growth in the county. This report includes highlights of the industries and detailed tables that meet the criteria established above.



Advanced Materials Cluster

The Advanced Materials cluster can be considered a mature cluster. This means that the cluster is heavily concentrated in the region (greater than 1.25) but has had a shrinking employment base. The Advanced Material Cluster is projected to have continued declines in employment over the next three years. This is consistent with state and national trends. Nonetheless, the Advanced Materials Cluster in DuPage is the fourth largest cluster in terms of employment, pays a competitive wage and includes over one thousand establishments.



Source: EMSI Complete Employment - 4th Quarter 2009

Description	% Change	Earnings Per Worker	2008 Establishments
DuPage County	-5%	\$77,432	1,104
Illinois	-4%	\$80,201	8,483
United States	-1%	\$81,287	150,537

Highlights from the Industry Perspective

- Twenty-two manufacturing and related industries are projected to grow in DuPage County over the next three years including several of the largest employing industries including Machine Shops (4%), and Printed Circuit Assembly Manufacturing, (11%).
- Testing Laboratories and Surgical & Medical Equipment Manufacturing are among the potentially emerging industries with average employment growth projected to be 3% and 7% respectively.
- Twenty industries are projected to decline in employment over the next three years especially in electrical equipment manufacturing and chemical manufacturing.

Detailed Industry Analysis of the Advanced Materials Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Twelve industries fall within this classification. In most cases these industries pay wages greater than the national average for the industry. They are predominantly in the machinery manufacturing industries with Machine Shops having the largest employment and the most establishments.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Current EPW	2008 Establishments
Machine shops	1,676	1,833	3%	1.64	\$58,453	142
Printed circuit assembly mfg	936	1,380	14%	4.66	\$65,478	11
Relay and industrial control mfg	779	781	0.09%	4.06	\$77,863	17
Sheet metal work manufacturing	678	764	4%	1.72	\$57,824	27
Cutting tool & machine tool mfg.	446	611	11%	4.60	\$62,226	15
Adhesive mfg	418	445	2%	4.90	\$68,435	10
Electronic connector mfg	283	350	7%	3.97	\$75,610	7
Plastics packaging film and sheet mfg.	239	340	12%	5.60	\$60,439	5
All other basic inorganic chemical mfg.	270	332	7%	2.09	\$135,927	3
Industrial gas mfg	280	302	3%	3.80	\$143,640	4
All other industrial machinery mfg	204	219	2%	1.84	\$78,133	11
Abrasive product mfg	181	203	4%	4.57	\$60,818	2
Coated and laminated packaging materials mfg.	99	127	9%	1.66	\$110,097	3
Nonferrous metal, except CU and AL, shaping	79	90	4%	1.58	\$56,293	2
Nonclay refractory mfg	54	63	5%	2.15	\$93,328	3
Other metalworking machinery mfg	43	51	6%	1.34	\$86,592	3

Source: EMSI Complete Employment - 4th Quarter 2009

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Six industries are considered potentially emerging and offer competitive wages when compared to the national average. The largest industry is testing laboratories with the largest employment and the most establishments.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Current EPW	2008 Establishments
Testing laboratories	673	732	3%	1.13	\$85,027	60
Surgical and medical instrument manufacturing	148	182	7%	0.32	\$97,989	9
Rolled steel shape manufacturing	70	89	8%	0.88	\$166,714	4
Iron and steel forging	58	70	6%	0.61	\$88,416	2
Ethyl alcohol manufacturing	33	40	7%	0.88	\$119,420	2
Social science and humanities research	300	338	4%	1.11	\$61,126	15

Source: EMSI Complete Employment - 4th Quarter 2009

Mature Industries

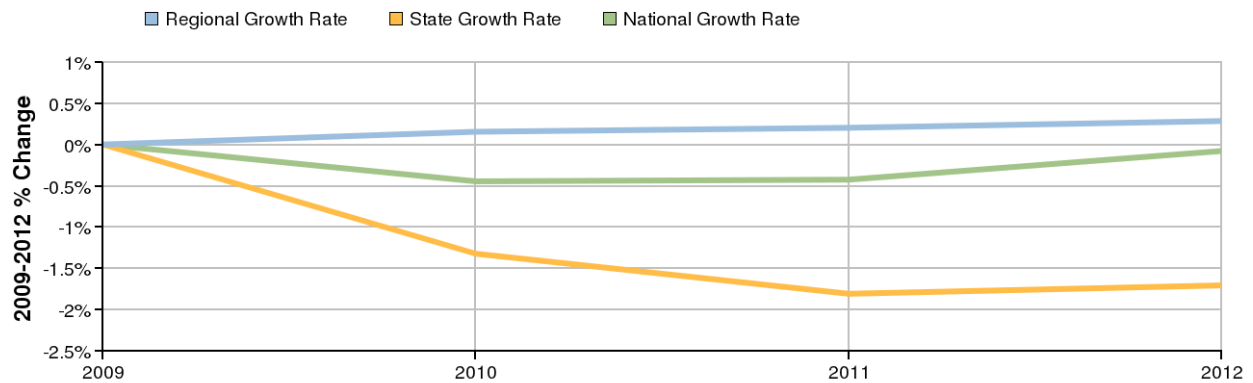
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Current EPW	2008 Establishments
Physical, engineering and biological research	4,820	4,266	-4%	2.01	\$107,046	97
All other plastics product manufacturing	1,806	1,735	-1%	1.66	\$50,055	51
Other commercial and service machinery mfg.	749	690	-3%	3.77	\$74,489	21
Polystyrene foam product manufacturing	611	593	-1%	5.61	\$54,355	9
Industrial process variable instruments	522	488	-2%	2.09	\$92,210	22
Special tool, die, jig, and fixture mfg.	543	433	-7%	2.19	\$65,586	53
Electroplating, anodizing, and coloring metal	399	379	-2%	1.61	\$53,538	23
Miscellaneous fabricated metal product mfg.	385	313	-7%	1.64	\$53,066	20
Industrial mold manufacturing	523	302	-17%	3.71	\$71,529	54
Other computer peripheral equipment mfg.	525	261	-21%	3.32	\$104,987	13
Other measuring and controlling device mfg.	260	258	0%	2.06	\$82,837	5
Broadcast and wireless communications equip.	412	252	-15%	1.32	\$111,917	14
Other miscellaneous chemical product mfg.	231	238	1%	1.50	\$128,029	11
Paint and coating manufacturing	212	213	0%	1.25	\$87,064	9
Current-carrying wiring device manufacturing	452	194	-25%	3.24	\$83,649	6
Ball and roller bearing manufacturing	252	186	-10%	2.12	\$74,744	1
Fiber optic cable manufacturing	239	181	-9%	6.23	\$117,135	7
Aluminum extruded product manufacturing	144	99	-12%	1.81	\$67,621	5
Electronic coils, transformers, and inductors	124	59	-22%	3.30	\$50,583	8
Powder metallurgy part manufacturing	72	61	-5%	2.17	\$57,783	2

Source: EMSI Complete Employment - 4th Quarter 2009

Transportation Equipment Manufacturing Cluster

The Transportation Equipment Manufacturing Cluster is projected to remain constant over the next three years. This is consistent national trends while the trend in the state is projected to decline. The Transportation Equipment Manufacturing Cluster in DuPage is not heavily concentrated in the region, has an average wage higher than the state but not the nation; however, the cluster has had employment growth, and there are fifty-three establishments in the county.



Description	% Change	Earnings Per Worker	2008 Establishments
DuPage County	0.26%	\$76,074	53
Illinois	-2%	\$69,484	560
United States	-0.7%	\$81,359	16,759

Source: EMSI Complete Employment - 4th Quarter 2009

Detailed Industry Analysis of the Transportation Equipment Manufacturing Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Two industries fall within this classification. These industries pay wages greater than the national average and are in manufacturing car parts and locomotive and rail related equipment.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Current EPW	2008 Establishments
Motor vehicle metal stamping	505	555	3.20%	1.98	\$65,901	4
Railroad rolling stock manufacturing	145	159	3.12%	1.44	\$69,934	4

Source: EMSI Complete Employment - 4th Quarter 2009

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Two industries are considered potentially emerging and offer competitive wages when compared to the national average. Aircraft parts and equipment manufacturing is not as heavily concentrated as truck manufacturing but is projected to grow over the next three years.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Current EPW	2008 Establishments
Heavy duty truck manufacturing	60	70	5.27%	0.60	\$95,618	1
Other aircraft parts and equipment	74	113	15.15%	0.20	\$109,849	5

Source: EMSI Complete Employment - 4th Quarter 2009

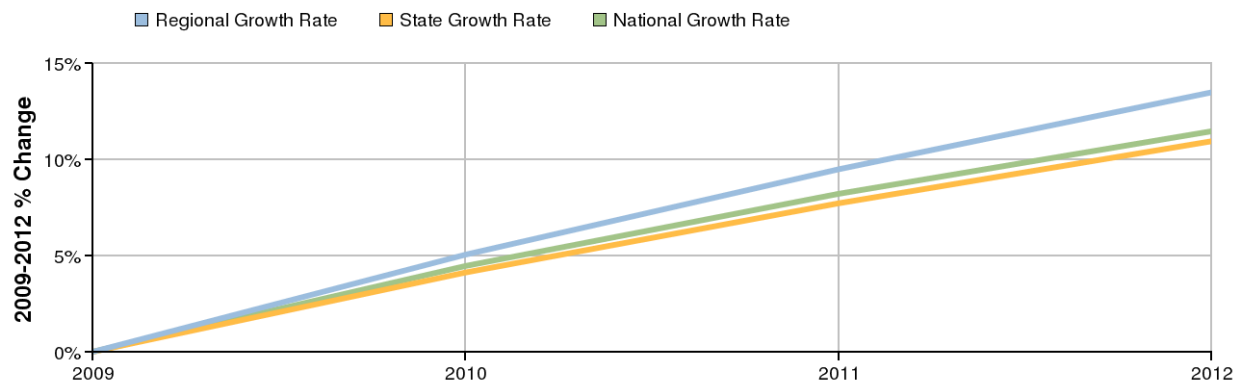
Mature Industries

Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Current EPW	2008 Establishments
Motor vehicle steering and suspension parts	186	156	-5.69%	1.62	\$92,434	4

Business and Financial Services Cluster

The Business and Financial Services Cluster is projected to have growth in employment over the next three years. This is consistent with state and national trends. This cluster is the largest cluster in terms of employment, pays a competitive wage and includes over nine thousand establishments.



Description	% Change	Earnings Per Worker	2008 Establishments
DuPage County	13%	\$74,208	9,979
Illinois	11%	\$79,448	69,790
United States	11%	\$70,412	1,430,892

Source: EMSI Complete Employment - 4th Quarter 2009

Highlights from the Industry Perspective

- Twenty-seven professional and financial firms are projected to grow in DuPage County over the next three years including several large employment industries including computer systems design services (9%), consulting services (9%), and engineering services (3%).
- Consulting service industries are among the potentially emerging industries with average employment growth to be around 5%.
- Six business industries are projected to decline in employment over the next three years particularly in data processing and related services and insurance related industries.

Detailed Industry Analysis of the Business/Financial Services Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Eighteen industries fall within this category. These industries pay wages greater than the national average for the industry. Many of the county's larger industries fall in this category and are related to information technology and consulting services.

Industry	2009 Jobs	2012 Jobs	Avg Empl Grwth	2009 LQ	Current EPW	2008 Establishments
Computer systems design services	11,550	15,154	9.48%	3.36	\$101,265	1,086
Custom computer programming services	7,667	9,410	7.07%	2.29	\$99,826	985
Engineering services	5,867	6,578	3.89%	1.45	\$91,250	436
Marketing consulting services	2,739	3,559	9.12%	2.31	\$74,720	338
Offices of certified public accountants	2,542	2,748	2.63%	1.35	\$83,774	339
All other insurance related activities	1,666	1,968	5.71%	4.40	\$75,591	93
Nonresidential property managers	1,497	1,813	6.59%	1.63	\$48,561	126
Other computer related services	1,641	1,806	3.25%	2.86	\$93,410	378
Graphic design services	1,525	1,697	3.63%	1.77	\$49,916	169
Third party administration of insurance funds	1,506	1,655	3.19%	1.62	\$53,357	42
Investment banking and securities dealing	1,276	1,640	8.73%	1.46	\$142,728	48
Mortgage and nonmortgage loan brokers	1,274	1,560	6.98%	2.65	\$65,027	218
Human resource consulting services	1,190	1,319	3.49%	1.46	\$92,063	170
Direct mail advertising	1,163	1,296	3.68%	3.17	\$60,956	42
Claims adjusting	518	571	3.30%	1.33	\$69,686	52
Real estate investment trusts	312	372	6.04%	1.91	\$87,531	19
Digital printing	189	244	8.89%	1.92	\$58,195	20
Other direct insurance carriers	175	190	2.78%	3.29	\$85,959	9

Source: EMSI Complete Employment - 4th Quarter 2009

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Nine industries are considered potentially emerging and offer competitive wages when compared to the national average. A majority of these industries are in services ranging from tax preparation to environmental consulting services.

Industry	2009 Jobs	2012 Jobs	Avg Empl Grwth	2009 LQ	Current EPW	2008 Establishments
Other activities related to real estate	4,497	5,705	8.25%	0.87	\$14,206	121
Residential property managers	1,668	1,774	2.07%	0.74	\$36,072	126
Tax preparation services	805	915	4.36%	0.86	\$29,951	61
Process and logistics consulting services	755	899	5.99%	1.08	\$71,650	109
Environmental consulting services	706	837	5.84%	1.13	\$73,480	74
Testing laboratories	673	732	2.84%	1.13	\$85,027	60
Other technical consulting services	577	702	6.75%	0.51	\$80,566	200
Media representatives	176	206	5.39%	0.96	\$87,992	28
All other legal services	22	27	7.06%	0.22	\$94,094	12

Source: EMSI Complete Employment - 4th Quarter 2009

Mature Industries

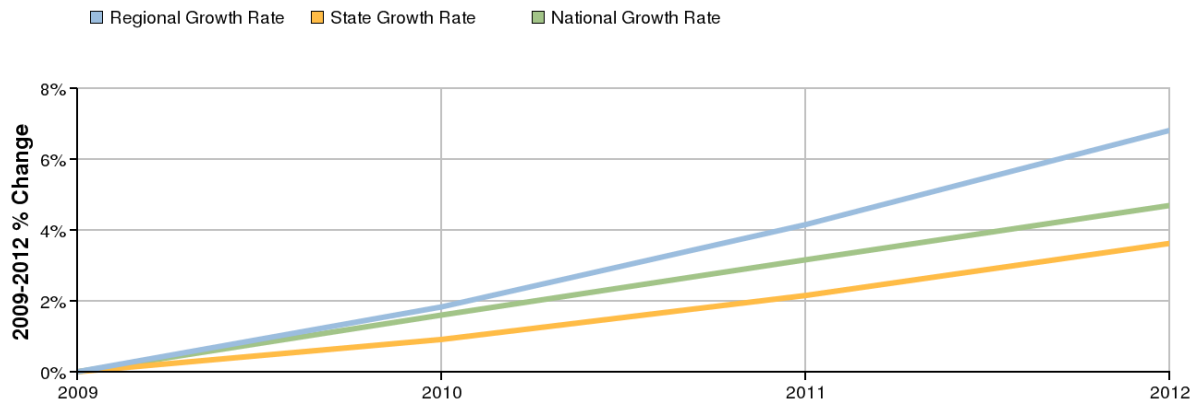
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average. Six industries are within this category and include services related to information technology and insurance industries.

Industry	2009 Jobs	2012 Jobs	Avg Empl Grwth	2009 LQ	Current EPW	2008 Establishments
Data processing and related services	2,710	2,508	-2.55%	2.19	\$114,209	138
Direct life insurance carriers	1,927	1,635	-5.33%	1.56	\$86,171	52
Advertising agencies	1,525	1,513	-0.26%	1.45	\$78,508	161
Real estate credit	1,466	1,448	-0.41%	1.56	\$77,235	140
Reinsurance carriers	677	577	-5.19%	5.79	\$78,107	8
Manifold business forms printing	247	124	-20.52%	2.06	\$89,253	13

Source: EMSI Complete Employment - 4th Quarter 2009

Information Technology and Telecommunications Cluster

The Information Technology and Telecommunications Cluster as a mature cluster is projected to grow over the next three years indicating this cluster will become a leading cluster. This cluster is one of the largest in terms of employment, pays a competitive wage and includes over four thousand establishments.



Area	% Change	Current EPW	2008 Establishments
DuPage County	7%	\$98,966	4,385
Illinois	4%	\$87,613	22,603
United States	5%	\$88,371	446,639

Source: EMSI Complete Employment - 1st Quarter 2010

Highlights from the Industry Perspective

- Eighteen service and manufacturing industries are projected to grow in DuPage County over the next three years including several of the largest employing industries including Computer Systems design services (10%) and Computer Programming (7%).
- The majority of manufacturing related to ITT pays high wages and are heavily concentrated here, but are projected to see continued declines in employment.

Detailed Industry Analysis of the Information Technology/Telecommunications Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Eleven industries fall within this category. These industries pay wages greater than the national average for the industry. Many of the county's larger industries fall in this category and are related to computer and internet related services.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings Per Worker	2008 Establishments
Computer systems design services	11,448	15,425	10.45%	3.32	\$101,239	1,107
Custom computer programming services	7,706	9,636	7.73%	2.30	\$99,795	997
Nonresidential electrical contractors	3,785	4,154	3.15%	1.40	\$79,954	195
Data processing and related services	2,716	2,727	0.13%	2.21	\$114,258	140
Other computer related services	1,608	1,807	3.97%	2.81	\$93,416	379
Software publishers	1,580	1,708	2.63%	1.37	\$99,894	157
Printed circuit assembly manufacturing	906	1,167	8.80%	4.54	\$65,481	11
Cellular and other wireless carriers	1,081	1,119	1.16%	1.34	\$110,132	45
Other electronic component manufacturing	477	586	7.10%	1.91	\$56,123	14
Miscellaneous electrical equipment mfg.	384	523	10.85%	3.44	\$60,114	12
Other communication and energy wire mfg.	161	228	12.30%	3.20	\$70,732	2

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Seven industries are considered potentially emerging and offer competitive wages when compared to the national average. The industries are mixed between services related to consulting and research to manufacturing.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings Per Worker	2008 Establishments
Other management consulting services	561	626	3.72%	0.81	\$75,255	159
Social science and humanities research	298	318	2.19%	1.11	\$61,174	15
Motor and generator manufacturing	193	207	2.36%	1.10	\$82,102	9
Internet service providers	144	197	11.01%	0.40	\$84,077	27
Web search portals	99	180	22.05%	0.51	\$129,965	7
Electronic computer manufacturing	83	118	12.44%	0.22	\$93,045	15
Carbon and graphite product manufacturing	16	19	5.90%	0.55	\$106,243	1

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

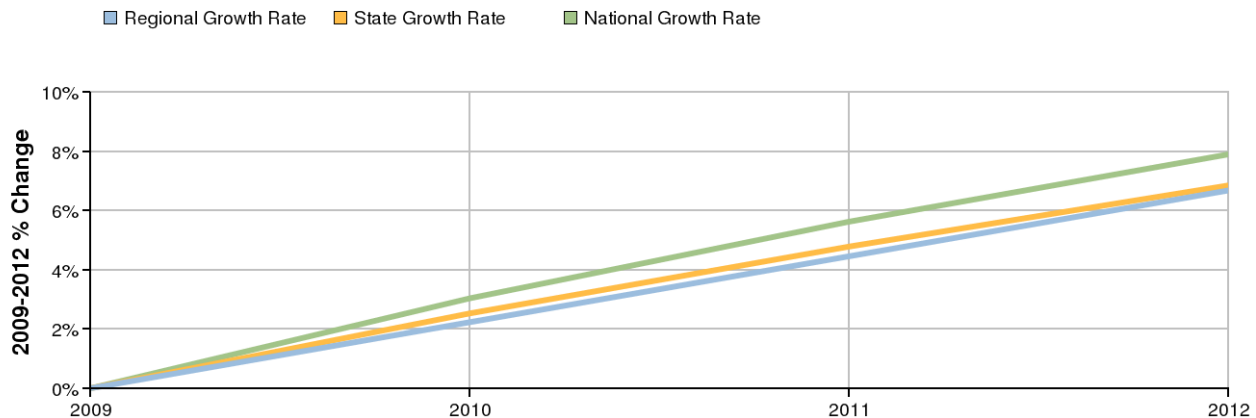
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average. Twenty industries are within this category and are predominately in the wholesale and manufacturing of equipment and computer goods.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings Per Worker	2008 Establishments
Physical, engineering and biological research	4,878	4,585	-2.04%	2.02	\$107,044	101
Computer and software merchant wholesalers	3,561	3,172	-3.78%	3.78	\$132,301	250
Other electronic parts merchant wholesalers	1,267	1,054	-5.95%	1.94	\$90,678	134
Telephone apparatus manufacturing	1,527	781	-20.03%	12.09	\$134,269	16
Relay and industrial control manufacturing	798	768	-1.27%	4.17	\$77,883	17
Telecommunications resellers	825	666	-6.89%	1.53	\$102,448	35
Industrial process variable instruments	525	511	-0.90%	2.13	\$92,214	22
Electronic connector manufacturing	388	389	0.09%	5.48	\$75,636	9
Other computer peripheral equipment mfg.	532	251	-22.15%	3.39	\$104,991	13
Broadcast and wireless communications equip.	412	242	-16.25%	1.32	\$111,919	14
Bare printed circuit board manufacturing	409	237	-16.63%	2.32	\$38,866	20
Current-carrying wiring device manufacturing	450	194	-24.46%	3.29	\$83,663	6
Fiber optic cable manufacturing	243	185	-8.69%	6.31	\$117,157	7
Mechanical power transmission equipment mfg.	158	132	-5.82%	2.68	\$55,409	5
Electric power and specialty transformer mfg.	144	130	-3.35%	1.36	\$43,644	4
Noncurrent-carrying wiring device mfg.	135	80	-16.01%	2.92	\$61,996	3
Electronic coils, transformers, and inductors	127	53	-25.27%	3.48	\$50,584	8
Automatic environmental control manufacturing	125	40	-31.60%	1.49	\$112,957	5
Software reproducing	69	26	-27.77%	1.38	\$174,957	14
Electronic resistor manufacturing	29	13	-23.47%	1.60	\$43,785	3

Source: EMSI Complete Employment - 1st Quarter 2010

Biomedical/Biotechnical (Life Sciences) Cluster

The Biomedical/Biotechnical (Life Sciences) Cluster is projected to have employment growth over the next three years. This is consistent with state and national trends. The cluster can be considered emerging since it is not as heavily concentrated as compared to other areas in the region.



Area	% Change	Earnings per Worker	2008 Establishments
DuPage County	7%	\$59,213	1,068
Illinois	7%	\$53,981	11,253
United States	8%	\$52,610	316,258

Source: EMSI Complete Employment - 1st Quarter 2010

Highlights from the Industry Perspective

- Fifteen Life Science industries are projected to grow in DuPage County over the next three years including Hospitals, Medical Centers, and other health care related services.
- Seven industries are projected to decline in employment in particular Physical, engineering and biological research and wholesale of medical equipment, two industries that pay competitive wage and are heavily concentrated in DuPage.
- Manufacturing related to Life Sciences are among the potentially emerging industries.

Detailed Industry Analysis of the Biotechnology/Biomedical (Life Sciences) Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. Four industries fall within this category. These industries pay wages greater than the national average and are primarily in the provision of medical services.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings per Worker	2008 Establishments
Continuing care retirement communities	2,355	2,791	5.83%	1.54	\$32,231	21
Blood and organ banks	587	820	11.79%	1.55	\$64,430	10
Freestanding emergency medical centers	549	709	8.90%	1.49	\$127,772	24
Diagnostic imaging centers	393	563	12.73%	1.25	\$70,225	31

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Eleven industries are considered potentially emerging and offer competitive wages when compared to the national average. A majority of these industries provide medical attention while there are three goods producing industries emerging.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings Per Worker	2008 Establishments
General medical and surgical hospitals	11,502	12,434	2.63%	0.65	\$59,316	26
Nursing care facilities	4,444	4,856	3.00%	0.66	\$36,663	43
Home health care services	3,741	4,492	6.29%	0.68	\$41,518	97
Ambulance services	820	871	2.03%	1.07	\$43,953	3
Psychiatric and substance abuse hospitals	448	477	2.11%	1.10	\$41,617	2
Residential mental and substance abuse care	322	404	7.86%	0.42	\$39,509	5
Pharmaceutical preparation manufacturing	314	364	5.05%	0.36	\$85,618	8
Social science and humanities research	298	318	2.19%	1.11	\$61,174	15
Kidney dialysis centers	163	238	13.45%	0.44	\$67,037	15
Surgical and medical instrument manufacturing	148	176	5.95%	0.32	\$98,298	9
Electromedical and electrotherapeutic apparatus manufacturing	74	132	21.28%	0.30	\$213,676	5

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

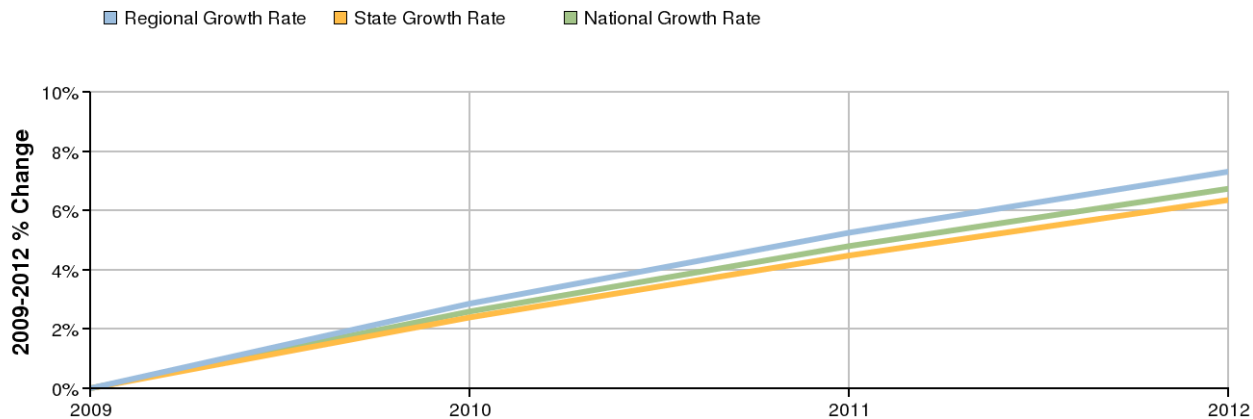
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average. Seven industries are within this category and range from health services to wholesale and research.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	Earnings Per Worker	2008 Establishments
Physical, engineering and biological research	4,878	4,585	-2.04%	2.02	\$107,044	101
Medical equipment merchant wholesalers	1,875	1,801	-1.33%	2.47	\$84,146	159
Other hospitals	1,012	818	-6.85%	1.32	\$57,730	4
All other health and personal care stores	520	510	-0.65%	1.39	\$57,315	33
Hazardous waste treatment and disposal	558	432	-8.18%	3.35	\$80,933	10
Optical goods stores	395	418	1.90%	1.50	\$38,187	52
Miscellaneous ambulatory health care services	296	242	-6.49%	1.86	\$140,930	14

Source: EMSI Complete Employment - 1st Quarter 2010

Transportation & Logistics Cluster

The transportation & Logistics Cluster is considered a leading cluster and is projected to grow in DuPage over the next three years. This trend is consistent with state and national trends, with the growth in DuPage pacing the national growth. The cluster offers a competitive wage and there are over fifteen hundred establishments in the county.



Area	% Change	Current EPW	2008 Establishments
DuPage County	7%	\$63,893	1,690
Illinois	6%	\$57,198	13,300
United States	7%	\$53,726	223,400

Highlights from the Industry Perspective:

- Over ten industries in this cluster are projected to add employment over the next three years and are predominantly in industries heavily concentrated in the county including trucking and warehousing/storage.
- The handful of mature industries in this cluster is support and service oriented industries to the freight and air transportation industries.

Detailed Industry Analysis of the Transportation & Logistics Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. Seven industries fall within this category. These industries pay wages greater than the national average and are primarily in logistics and trucking industries.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Freight transportation arrangement	6,668	7,095	2.09%	8.65	\$77,446	406
General warehousing and storage	5,061	5,272	1.37%	2.14	\$41,335	64
General freight trucking, local	2,701	2,885	2.22%	1.50	\$57,727	408
Other warehousing and storage	1,135	1,431	8.03%	5.75	\$62,318	15
Packaging and labeling services	685	808	5.66%	2.12	\$48,700	32
Other support activities for road transport.	254	282	3.55%	1.79	\$46,400	23
Coastal and Great Lakes freight transport.	89	116	9.23%	1.93	\$85,639	3

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Six industries are considered potentially emerging and offer competitive wages when compared to the national average. These industries are further related to support services to the trucking and logistics industry.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
General freight trucking, long-distance TL	2,636	3,196	6.63%	0.88	\$78,447	159
Process and logistics consulting services	754	943	7.74%	1.07	\$71,649	111
Other specialized trucking, local	703	840	6.11%	0.79	\$61,646	93
Other support activities for air transport.	152	267	20.66%	0.37	\$43,041	6
Nonscheduled air passenger chartering	78	104	10.06%	0.55	\$87,209	10
Other airport operations	31	33	2.11%	0.12	\$23,337	7

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. Eight industries are within this category and are more closely related to freight transportation.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Local messengers and local delivery	715	757	1.92%	2.66	\$36,582	68
Used household and office goods moving	822	725	-4.10%	2.03	\$66,703	49
Deep sea freight transportation	378	362	-1.43%	7.50	\$85,994	13
Pipeline transportation of crude oil	259	265	0.77%	7.29	\$144,937	2
Support activities for rail transportation	190	176	-2.52%	1.87	\$74,388	7
Scheduled freight air transportation	76	70	-2.70%	1.64	\$74,527	9
Transportation equipment rental and leasing	64	60	-2.13%	1.41	\$125,525	10
Other nonscheduled air transportation	32	17	-19.01%	2.81	\$104,675	5

Source: EMSI Complete Employment - 1st Quarter 2010

Manufacturing Cluster (*specifically Fabricated Metals, Machinery, and Primary Metal Manufacturing*)

Three benchmarks are used to identify industries that may have a competitive advantage: a high employment concentration (referred to as a location quotient); high wage levels; and fast employment growth in the county. An initial cluster analysis for DuPage County identified the Manufacturing cluster as mature industry, yet it continues to decline in overall employment.

Area	% Change	Avg Earnings	Establishments
DuPage County	-8%	\$69,583	841
Illinois	-7%	\$73,361	6,621
United States	-3%	\$67,783	98,212

Highlights from the Industry Perspective

- Manufacturing is an industry sector that pays a competitive annual wage, but the sector is projected to continue to lose employment overall. However, manufacturing related to other clusters (i.e. biomedical and information technology) will be in just as much demand as their service sector counterparts.
- Over twenty manufacturing industries are projected to grow in DuPage County over the next three years especially in Machine Shops and Precision product manufacturing two of the largest industries in the region.
- Conversely, over twenty manufacturing industries, although heavily concentrated in the county, are projected to have declines in employment in the next three years.

Detailed Industry Analysis of the Manufacturing Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. Ten industries fall within this category. These industries pay wages greater than the national average and include large employing industries including machine shop and precision product manufacturing.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earning per Worker	2008 Establishments
Machine shops	1,689	1,796	2.07%	1.67	\$58,437	143
Precision turned product manufacturing	1,142	1,257	3.25%	8.07	\$59,393	32
Sheet metal work manufacturing	691	747	2.63%	1.77	\$57,816	28
Cutting tool and machine tool accessory mfg.	442	630	12.54%	4.71	\$62,221	15
Fluid power valve and hose fitting mfg.	224	253	4.14%	1.67	\$54,825	3
Metal heat treating	172	189	3.19%	2.51	\$57,846	8
Fabricated pipe and pipe fitting mfg.	169	183	2.69%	1.46	\$58,085	9
Elevator and moving stairway manufacturing	61	80	9.46%	1.79	\$45,775	2
Rolling mill machinery and equipment mfg.	49	68	11.54%	3.22	\$56,911	4
Industrial process furnace and oven mfg.	58	66	4.40%	1.26	\$70,140	3

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but high employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Eleven industries are considered potentially emerging and offer competitive wages when compared to the national average. A majority of these industries are involved in transforming metal into intermediate or end products.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Metal window and door manufacturing	255	297	5.21%	1.08	\$73,021	9
Prefabricated metal buildings and components	123	198	17.20%	0.97	\$67,550	1
Industrial valve manufacturing	120	147	7.00%	1.22	\$93,543	4
Ornamental and architectural metal work mfg.	99	123	7.50%	0.65	\$78,453	9
Pump and pumping equipment manufacturing	84	111	9.74%	0.76	\$77,001	3
Fluid power pump and motor manufacturing	60	80	10.06%	0.80	\$94,775	4
Metal can manufacturing	65	78	6.27%	0.79	\$121,092	1
Food product machinery manufacturing	36	53	13.76%	0.54	\$90,149	6
Other metalworking machinery manufacturing	37	48	9.06%	1.18	\$86,851	3
Construction machinery manufacturing	18	28	15.87%	0.06	\$99,129	1
Overhead cranes, hoists, and monorail systems	17	21	7.30%	0.30	\$112,933	4

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

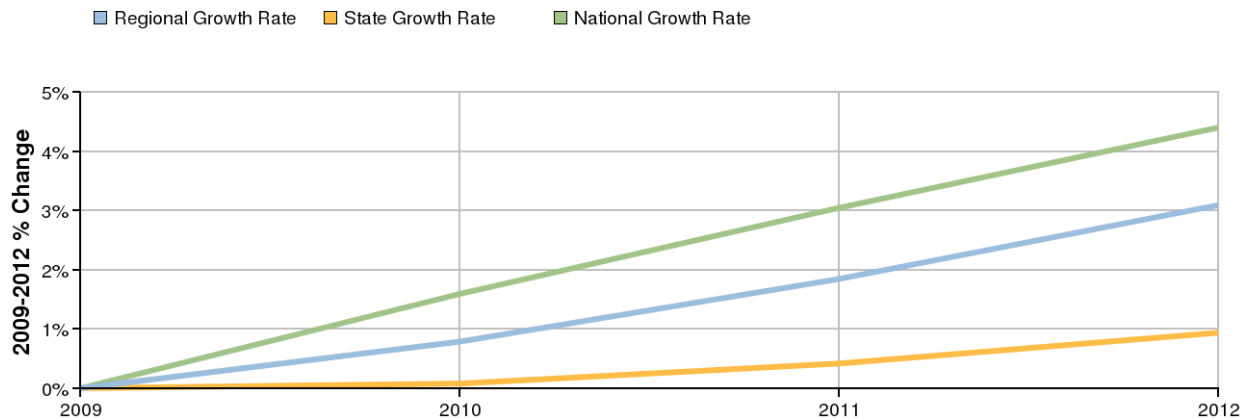
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold but have not recently experienced any significant growth in employment. In many cases these industries have a decline in employment growth. However, these industries have higher earnings per worker than the national average. Twenty-nine industries are within this category and range from are split between machinery manufacturers and fabricated metal manufacturing.

Description	2009 Jobs	2012 Jobs	AAG	2009 LQ	Current EPW	2008 Establishments
Bolt, nut, screw, rivet, and washer mfg.	1,067	897	-5.62%	6.90	\$80,696	35
Other commercial and service machinery mfg.	733	688	-2.09%	3.71	\$74,491	21
Metal stamping	653	635	-0.93%	3.32	\$73,308	26
Other metal valve and pipe fitting mfg.	823	507	-14.91%	11.75	\$53,333	5
AC, refrigeration, and forced air heating	618	500	-6.82%	1.64	\$69,004	12
Printing machinery and equipment mfg.	565	453	-7.10%	12.27	\$58,398	17
Speed changer, drive, and gear manufacturing	411	425	1.12%	7.85	\$78,947	6
Special tool, die, jig, and fixture mfg.	515	422	-6.42%	2.13	\$65,637	53
Electroplating, anodizing, and coloring metal	395	362	-2.87%	1.63	\$53,547	23
Industrial mold manufacturing	519	320	-14.89%	3.82	\$71,533	54
Plastics and rubber industry machinery	307	294	-1.43%	5.46	\$64,735	12
Metal coating and nonprecious engraving	297	277	-2.30%	1.45	\$39,095	21
Hardware manufacturing	243	215	-4.00%	2.30	\$69,167	11
All other industrial machinery manufacturing	200	199	-0.17%	1.83	\$78,167	12
Metal forming machine tool manufacturing	226	198	-4.31%	4.56	\$60,697	14
Ball and roller bearing manufacturing	256	179	-11.24%	2.18	\$74,724	1
Mechanical power transmission equipment mfg.	158	132	-5.82%	2.68	\$55,409	5
Fluid power cylinder and actuator mfg.	206	128	-14.67%	3.17	\$74,564	6
Hand and edge tool manufacturing	201	116	-16.74%	1.72	\$96,657	15
Spring, light gauge, manufacturing	158	111	-11.10%	3.97	\$41,615	7
Industrial and commercial fan and blower mfg.	150	98	-13.23%	3.39	\$88,447	5
Other fabricated wire product manufacturing	173	96	-17.82%	1.36	\$50,507	11
Spring, heavy gauge, manufacturing	78	77	-0.43%	4.71	\$50,917	2
Commercial laundry and drycleaning machinery	72	68	-1.89%	5.12	\$69,304	1
Plumbing fixture fitting and trim mfg.	90	67	-9.37%	2.23	\$32,359	1
Powder metallurgy part manufacturing	62	50	-6.92%	1.94	\$57,821	2
Crown and closure manufacturing	159	48	-32.92%	18.33	\$82,798	3
Custom roll forming	69	46	-12.64%	3.22	\$51,462	2
Packaging machinery manufacturing	86	41	-21.88%	1.32	\$84,945	10

Source: EMSI Complete Employment - 1st Quarter 2010

Printing & Publishing Cluster

The Printing and Publishing Cluster is projected to grow over the next three years, which is consistent with the national and state as well. The cluster pays a competitive wage and has over fifteen hundred establishments.



Area	% Change	Current EPW	2008 Establishments
DuPage County	3%	\$64,579	1,589
Illinois	1%	\$69,560	12,040
United States	4%	\$61,576	197,853

Source: EMSI Complete Employment - 1st Quarter 2010

Highlights from the Industry Perspective:

- The leading industries in the printing and publishing cluster are predominantly in graphic design, advertising and related printing services.
- Mature industries in this cluster are in printing and manufacturing. As more graphic design and advertising is computer based these will continue to be important support industries for the cluster and other clusters such as business and financial services.

Detailed Industry Analysis of the Printing & Publishing Cluster

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Eight industries fall within this classification. In most cases these industries pay wages greater than the national average for the industry. They are predominantly in the Professional Services industries especially the consulting and design industries.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	DuPage EPW	2008 Establishments
Marketing consulting services	2,730	3,736	11.02%	2.31	\$74,703	345
Graphic design services	1,547	1,765	4.49%	1.85	\$50,025	170
Direct mail advertising	1,113	1,248	3.89%	3.15	\$60,996	43
Cable and other subscription programming	834	903	2.69%	2.24	\$52,359	13
Book publishers	606	647	2.21%	1.73	\$57,922	36
Other commercial printing	542	578	2.17%	2.85	\$49,167	35
Other services related to advertising	540	576	2.17%	1.35	\$50,100	84
Digital printing	186	236	8.26%	1.88	\$58,172	20

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but projecting employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor. Seven industries are considered potentially emerging in a range of advertising to manufacturing industries.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	DuPage EPW	2008 Establishments
Sign manufacturing	380	476	7.80%	0.97	\$73,820	45
Display advertising	261	275	1.76%	1.25	\$34,668	20
Media representatives	165	196	5.91%	0.94	\$88,109	28
Commercial gravure printing	119	124	1.38%	2.22	\$46,203	9
All other information services	53	63	5.93%	0.77	\$164,201	19
Radio stations	13	40	45.45%	0.04	\$72,021	1
Radio networks	27	33	6.92%	0.26	\$36,943	2

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

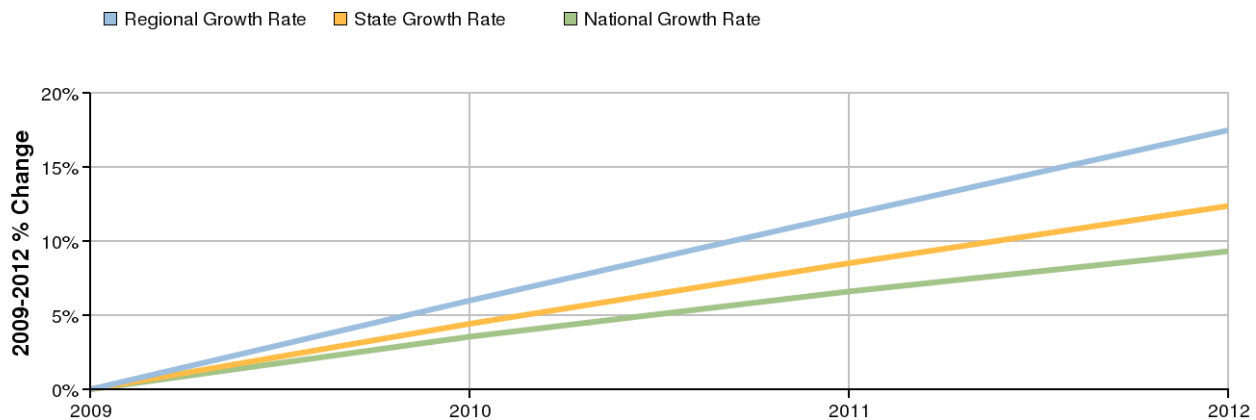
Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold in the county but are not projected to have significant growth in employment. In many cases these industries will have a decline in employment.

Industry	2009 Jobs	2012 Jobs	Avg Emp Growth	2009 LQ	DuPage EPW	2008 Establishments
Commercial lithographic printing	2,457	2,305	-2.11%	2.75	\$68,543	103
Advertising agencies	1,516	1,507	-0.20%	1.47	\$78,471	162
Commercial flexographic printing	748	638	-5.16%	4.97	\$61,390	26
Quick printing	616	590	-1.43%	2.49	\$45,935	65
Directory and mailing list publishers	650	532	-6.46%	3.46	\$73,545	16
Printing ink manufacturing	300	299	-0.11%	6.93	\$71,442	16
Manifold business forms printing	240	121	-20.41%	2.02	\$89,202	13
Prepress services	201	104	-19.72%	2.32	\$68,207	27
Blankbook and looseleaf binder manufacturing	116	59	-20.18%	3.75	\$52,398	4

Source: EMSI Complete Employment - 1st Quarter 2010

Defense and Security Cluster

The Defense and Security cluster is projected to grow over the next three years, similar to but faster than the state and national rate. This cluster pays a competitive wage compared to the national average and has close to three thousand establishments.



Description	% Change	Current EPW	2008 Establishments
DuPage County	17%	\$88,214	2,965
Illinois	12%	\$74,845	14,033
United States	9%	\$74,766	294,764

Source: EMSI Complete Employment - 1st Quarter 2010

Highlights from the industry perspective:

- The Defense and Security Cluster includes leading industries identified elsewhere in this report in the computer software and development services. Two industries related to security protection is also projected to grow in the county.
- Three industries are identified as emerging and cover diverse industries in construction, airplane equipment and maintenance and repair work.
- Physical Engineering and Biological Research is identified as a mature industry a trend noted in other clusters including Biotechnology Cluster and Information Technology.

Leading Industries

Industries with high concentration and positive employment growth are important growth industries in the region. They represent industries that export products and may have a competitive advantage because they are more concentrated in DuPage County. Seven industries fall within this classification. They are predominantly in the Professional Services industries especially computer programming and security protection.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Computer systems design services	11,448	15,425	10.45%	3.32	\$101,239	1,107
Custom computer programming services	7,706	9,636	7.73%	2.30	\$99,795	997
Security guards and patrol services	4,055	4,277	1.79%	1.41	\$37,532	34
Other computer related services	1,608	1,807	3.97%	2.81	\$93,416	379
Security systems services, except locksmiths	1,210	1,358	3.92%	2.50	\$71,258	47
Other transport. goods merchant wholesalers	426	493	4.99%	3.04	\$85,247	35
Fluid power valve and hose fitting mfg.	224	253	4.14%	1.67	\$54,825	3

Source: EMSI Complete Employment - 1st Quarter 2010

Emerging Industries

Industries with low concentration but projecting employment growth may be emerging industries. Employment growth indicates that the industry and its products are in demand. That demand is met with increased labor.

Three industries are considered potentially emerging in a range of industries.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Other household goods repair and maintenance	856	915	2.25%	0.66	\$28,093	33
Power and communication system construction	289	325	3.99%	0.49	\$66,444	19
Other aircraft parts and equipment	88	121	11.20%	0.23	\$109,782	5

Source: EMSI Complete Employment - 1st Quarter 2010

Mature Industries

Industries that have a high concentration and low employment growth are mature industries. They represent industries that have a stronghold in the county but are not projected to have significant growth in employment.

In many cases these industries have a decline in employment.

Industry	2009 Jobs	2012 Jobs	Avg Empl Growth	2009 LQ	Earnings per Worker	2008 Establishments
Physical, engineering and biological research	4,878	4,585	-2.04%	2.02	\$107,044	101

Source: EMSI Complete Employment - 1st Quarter 2010

Summary of Detailed Industry Analysis

The industries listed below cross clusters and appear more than once. For example, Surgical and Medical Instrument Manufacturing is an industry that was identified as an emerging industry and appears in both the Biomedical Cluster and the Advanced Materials Cluster. The summary below identifies any industries that appear more than once in each category – Leading, Emerging, and Mature.

Leading Industries:

Sheet Metal Manufacturing
Machine Shops
Printed Circuit Assembly Manufacturing
Custom Computer Programming Services
Computer Systems Design Services
Other Computer Related Services

Emerging Industries:

Surgical and Medical Instrument Manufacturing
Testing Laboratories
Process and Logistics Consulting Services
Social Science and Humanities Research

Mature Industries:

Ball and Roller Bearing Manufacturing
Broadcast and Wireless Communications Equipment
Current-carrying Wiring Device Manufacturing
Electronic Coils, Transformers, and Inductors
Electroplating, Anodizing, and Coloring Metal
Fiber Optic Cable Manufacturing
Industrial Mold Manufacturing

Mature Industries:

Industrial Process Variable Instruments
Mechanical Power Transmission Equipment Manufacturing
Other Commercial and Service Machinery Manufacturing
Other Computer Peripheral Equipment Manufacturing
Physical, Engineering and Biological Research
Powder Metallurgy Part Manufacturing
Special Tool, Die, Jig, and Fixture Manufacturing

Asset Map

Industrial Base

Advanced Materials Cluster

There are over one thousand establishments in the advanced materials cluster. The top ten largest employers include:

NAICS Code	Industry	Business Name
339112	Surgical and medical instrument manufacturing	Argonne National Laboratory
332999	Miscellaneous fabricated metal product mfg.	Spraying Systems Co
334417	Electronic connector manufacturing	Molex Inc
541711	Physical, engineering and biological research	Cnh Burr Ridge Operations
331316	Aluminum extruded product manufacturing	Werner Co
332116	Metal stamping	Wilton Brands Inc
339112	Surgical and medical instrument manufacturing	M & R Printing Equipment Inc
332116	Metal stamping	Fic America Corp
325998	Other miscellaneous chemical product mfg.	Cabot Microelectronics
326199	All other plastics product manufacturing	Phoenix Closures

Source: Nielsen Claritas Business-Facts®

Business and Financial Services Cluster

There are over nine thousand establishments in the business and financial services cluster. The top ten largest employers include:

NAICS Code	Industry	Business Name
522291	Consumer lending	Household Finance Corp
541613	Marketing consulting services	Calence Insight Networking
518210	Data processing and related services	Acxiom Corp
524114	Direct health and medical insurance carriers	First Health Group Corp
541330	Engineering services	Ambitech Engineering Corp
531390	Other activities related to real estate	Sirva Relocation Llc
523930	Investment advice	Van Kampen Funds Inc
541330	Engineering services	Ambitech
541211	Offices of certified public accountants	Crowe Horwath Llp
541810	Advertising agencies	Aspen Marketing Svc

Source: Nielsen Claritas Business-Facts®

Transportation Equipment Manufacturing Cluster

There are over fifty establishments in the transportation equipment manufacturing cluster. The top ten largest employers include:

NAICS Code	Industry	Business Name
336211	Motor vehicle body manufacturing	Navistar Inc
336399	All other motor vehicle parts manufacturing	Progressive Automotive Sys
336399	All other motor vehicle parts manufacturing	Chrysler Parts Distribution
336399	All other motor vehicle parts manufacturing	Hendrickson Usa Llc
336399	All other motor vehicle parts manufacturing	Itw Chronotherm
336399	All other motor vehicle parts manufacturing	Machinery Components Inc
336510	Railroad rolling stock manufacturing	Salco Products Inc
336510	Railroad rolling stock manufacturing	Relco Locomotives Inc
336413	Other aircraft parts and equipment	Scot Inc
336399	All other motor vehicle parts manufacturing	S & S Truck Parts Inc

Source: Nielsen Claritas Business-Facts®

Information Technology and Telecommunications Cluster

There are over four thousand establishments in the ITT cluster. The top ten largest employers include:

NAICS Code	Industry	Business Name
517919	Other telecommunications	Alcatel-lucent
517110	Wired telecommunications carriers	A T & T
334417	Electronic connector manufacturing	Molex Inc
518210	Data processing and related services	Acxiom Corp
541711	Physical, engineering and biological research	Cnh Burr Ridge Operations
517919	Other telecommunications	Verizon Business
238210	Residential electrical contractors	Siemens Energy & Automation
518210	Data processing and related services	Fiserv
518210	Data processing and related services	Tri Zetto Group
238210	Residential electrical contractors	Emcor Services Team Mechanical

Source: Nielsen Claritas Business-Facts®

Biomedical/Biotechnology (Life Sciences) Cluster

There are over one thousand establishments in the Biomed/Biotech cluster. Top ten largest employers include:

NAICS Code	Industry	Business Name
622110	General medical and surgical hospitals	Edward Hospital & Health Svc
339112	Surgical and medical instrument manufacturing	Argonne National Laboratory
622110	General medical and surgical hospitals	Advocate Good Samaritan Hosp
622110	General medical and surgical hospitals	Elmhurst Memorial Healthcare
541711	Physical, engineering and biological research	Cnh Burr Ridge Operations
339112	Surgical and medical instrument manufacturing	M & R Printing Equipment Inc
423450	Medical equipment merchant wholesalers	Philips Medical Systems Inc
621511	Medical laboratories	Lab Corp
621493	Freestanding emergency medical centers	Dupage Medical Group
339112	Surgical and medical instrument manufacturing	Dunlee Inc

Source: Nielsen Claritas Business-Facts®

Transportation & Logistics

There are over fifteen hundred establishments in the Transportation & Logistics cluster. Top ten largest employers include:

NAICS Code	Industry	Business Name
484110	General freight trucking, local	Sirva Inc
484230	Other specialized trucking, long-distance	Black Horse Carriers Inc
484110	General freight trucking, local	Allied Van Lines
541614	Process and logistics consulting services	Reed Business Information
488510	Freight transportation arrangement	Ait Worldwide Logistics
561910	Packaging and labeling services	Havi Global Solutions
486210	Pipeline transportation of natural gas	Kinder Morgan
484230	Other specialized trucking, long-distance	Central States Trucking
541614	Process and logistics consulting services	Csc Consulting Inc
488510	Freight transportation arrangement	Ups Supply Chain Solutions

Source: Nielsen Claritas Business-Facts®

Printing & Publishing

There are over one thousand establishments in the Printing & Publishing Cluster. Top ten largest employers include:

NAICS Code	Industry	Business Name
541613	Marketing consulting services	Calence Insight Networking
323110	Commercial lithographic printing	Berlin Industries Inc
541810	Advertising agencies	Aspen Marketing Svc
541613	Marketing consulting services	Kellogg's Snacks
323121	Tradebinding and related work	Booklet Binding Inc
541613	Marketing consulting services	Computer Accessories
323119	Other commercial printing	Continental Web Press
541613	Marketing consulting services	Havi Group Lp
323110	Commercial lithographic printing	Moore North America
541850	Display advertising	Exhibitgroup/giltspur

Source: Nielsen Claritas Business-Facts®

Defense & Security

There are over one thousand establishments in the Defense & Security Cluster. Top ten largest employers include:

NAICS Code	Description	Business Name
541711	Physical, engineering and biological research	Cnh Burr Ridge Operations
423860	Other transport. goods merchant wholesalers	Aar Aircraft Sales & Leasing
561621	Security systems services, except locksmiths	Adt Security Svc
237130	Power and communication system construction	Infra Source Underground Svc
423120	New motor vehicle parts merchant wholesalers	Illinois Auto Electric Co
334290	Other communications equipment manufacturing	Simplex Grinnell Warehouse
561612	Security guards and patrol services	Kard Protection Group Inc
561611	Investigation services	Factual Photo
423120	New motor vehicle parts merchant wholesalers	International Truck & Engine
541511	Custom computer programming services	Ultimate Software Consultants

Source: Nielsen Claritas Business-Facts®

Human Capital

Each cluster contains a skilled workforce from life sciences, financial management, computer technology, to production and manufacturing. DuPage County population is well educated (figure 1). Over 45% have a bachelor's degree or higher, while 91% of residents have a high school degree or higher. Many of the clusters require highly skilled workers (figure 2) especially in Professional Services like engineering and life sciences, information technology and advanced manufacturing. Over twenty percent of the county's workforce is employed in occupations considered to be vital in high-technology clusters.

There are approximately twenty institutions of higher learning in DuPage County; including some satellite campuses..

FIGURE 1

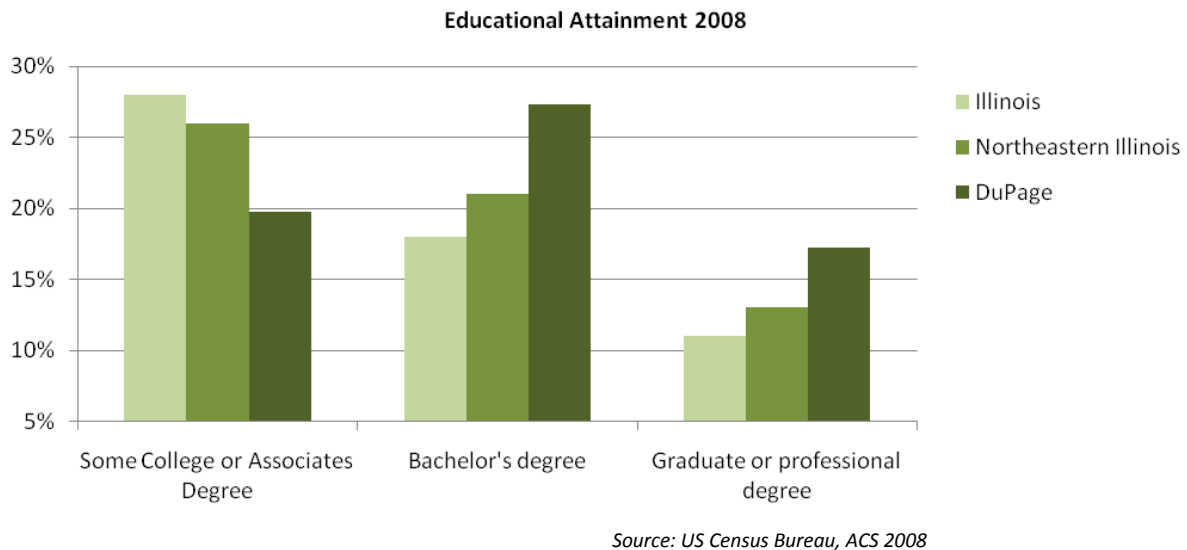
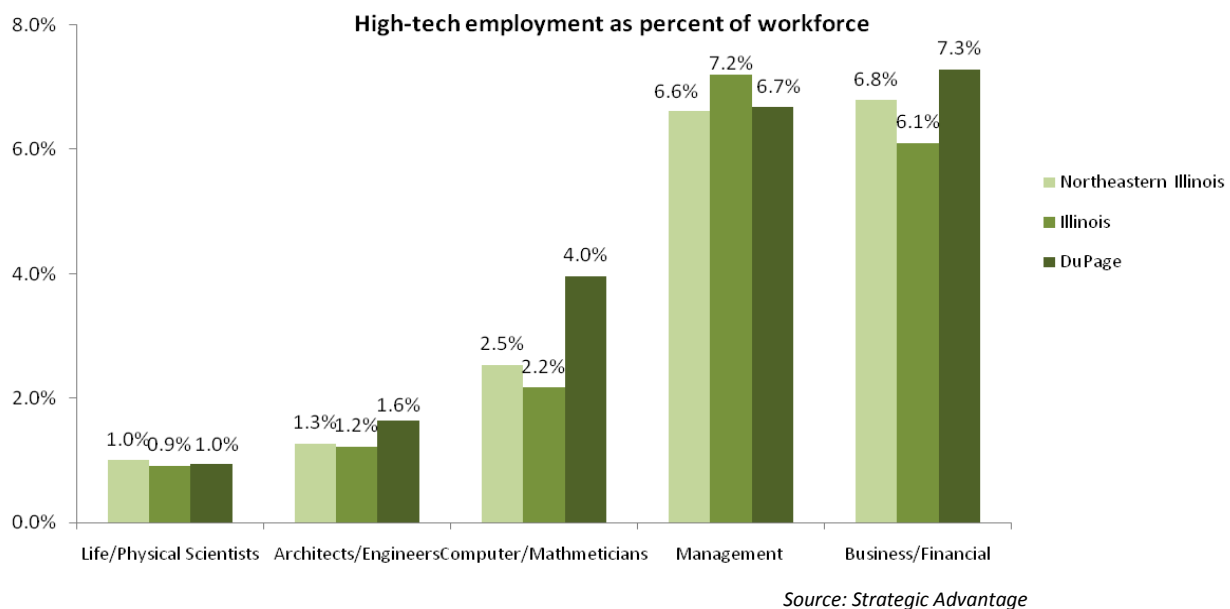


FIGURE 2



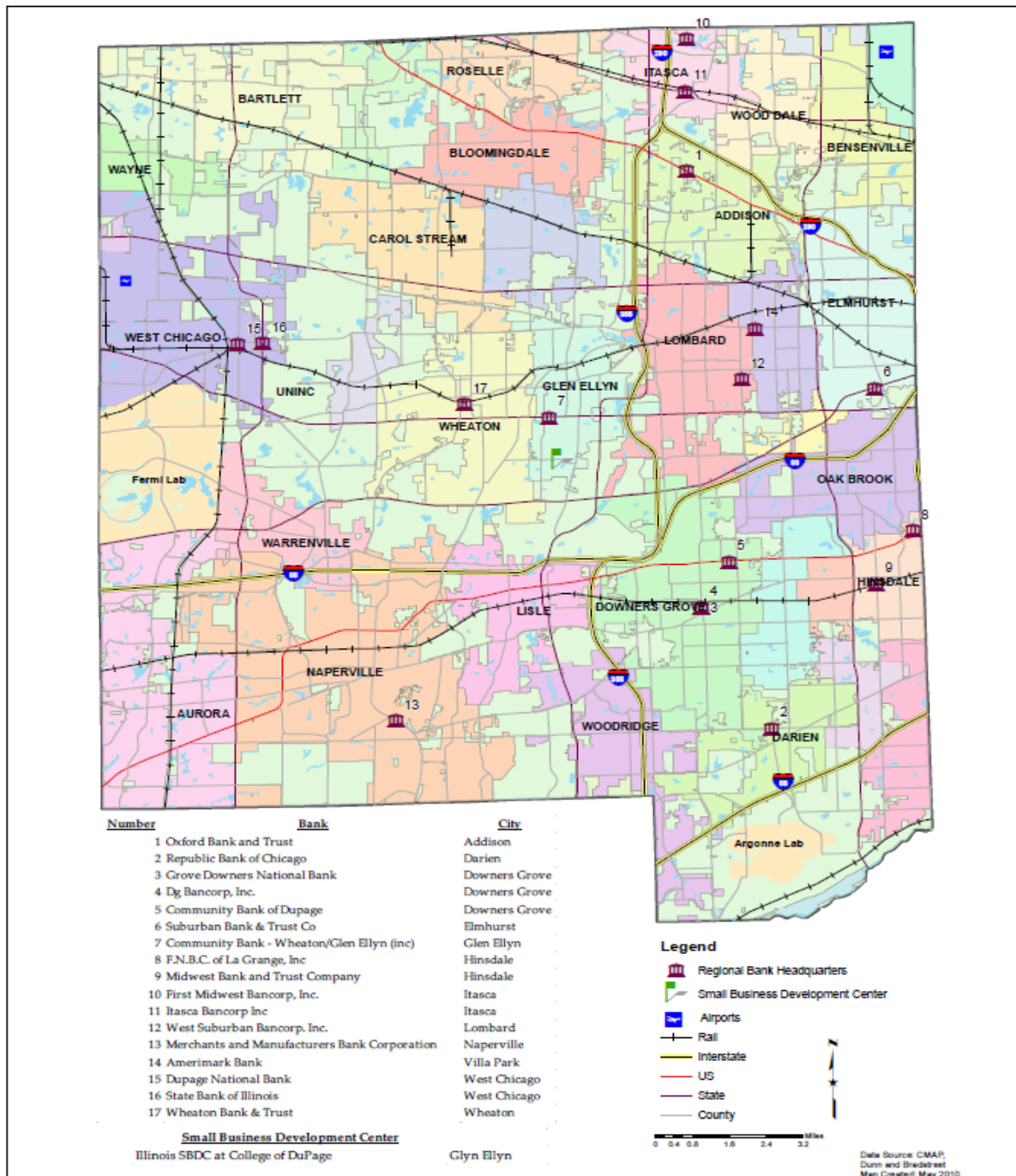
Universities in DuPage County, Illinois

School	Municipality	Total Enrollment	Undergraduate	Graduate
DeVry University *	Addison	3,400	***	***
DeVry University *	Downers Grove	***	***	***
DeVry University *	Naperville	***	***	***
Chamberlain College of Nursing	Addison	***	***	***
National University of Health Sciences	Lombard	740	100	640
Northern Seminary *	Lombard	300	0	300
Westwood College *	Woodridge	500	500	0
Northwestern College *	Naperville	121	121	0
Illinois Institute of Technology *	Wheaton	288**	47	38
Robert Morris University *	Bensenville	91	91	0
Robert Morris University *	Aurora	324	310	14
Benedictine University	Lisle	7,013	3,825	3,188
Elmhurst College	Elmhurst	3,455	3,190	265
Midwestern University	Downers Grove	2,300	0	2,300
North Central College	Naperville	2,960	2,700	260
Lewis University *	Oak Brook	320	108	212
National Louis University *	Lisle	1,160	182	978
Northern Illinois University *	Naperville	3,625	401	3,224
Northwood University	Glen Ellyn	100	100	0
DePaul University *	Naperville	1,500	1,000	500
Wheaton College	Wheaton	3,000	2,400	600
College of DuPage (community college)	Glen Ellyn	30,000	30,000	0
* Satellite campus				
** ITT has over 200 students who take classes as continuing education without pursuing a degree.				
*** DeVry University and Chamberlain College of Nursing have over 3,400 students between the two schools in DuPage County for both undergraduate and graduate programs.				

Financial Capital

An important asset to industry, entrepreneurs, and small business is financial capital. Innovation and business growth require significant resources. Regional banks and small business development centers offer programs and solutions to issues related to financial capital. Below is a list of bank headquarters in DuPage County as well as the Illinois Small Business Development Center.

DuPage County Regional Bank HQ and Small Business Center



Infrastructure

A region's physical infrastructure is essential to successful clusters, innovative industries, and attracting and expanding companies. Industry relies on access to highways, airports and available rail and trucking routes. The building stock and in the new decade the availability of green buildings is an asset for attracting and retaining business. Commuting habits and migration is useful to understand how residents get to work and where they are going.

COMMUTING TO WORK	Estimate	Percent
Car, truck, or van -- drove alone	373,982	78.90%
Car, truck, or van -- carpooled	34,189	7.20%
Public transportation (excluding taxicab)	30,447	6.40%
Walked	8,669	1.80%
Other means	6,253	1.30%
Worked at home	20,522	4.30%
Mean travel time to work (minutes)	28.9	

Source: U.S. Census, American Community Survey, 2008

Real Estate data

DuPage County has a diverse building stock of industrial and office buildings. The availability of business and industrial space is an asset as companies look to expand or move into the area for business.

DuPage	Buildings	Vacant Rate	Average Rate	Average time on the market
Industrial	3,036	14%	\$4.54 whse avg	16.9 Months
Office	1,776	18%	\$20.50/yr	23.8 Months

Source: CoStar Group; Quarter 4, 2009

Industrial/Business Parks

The county has over 90 business and industrial parks, 1 Technology Park, and 2 federal research facilities. Many parks have quick access to the transportation network, airports, and Midwest market.

Data Sources and Calculations

Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

Location Quotient

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

State Data Sources

This report uses state data from the following agencies: Illinois Department of Employment Security, Employment Projections.