

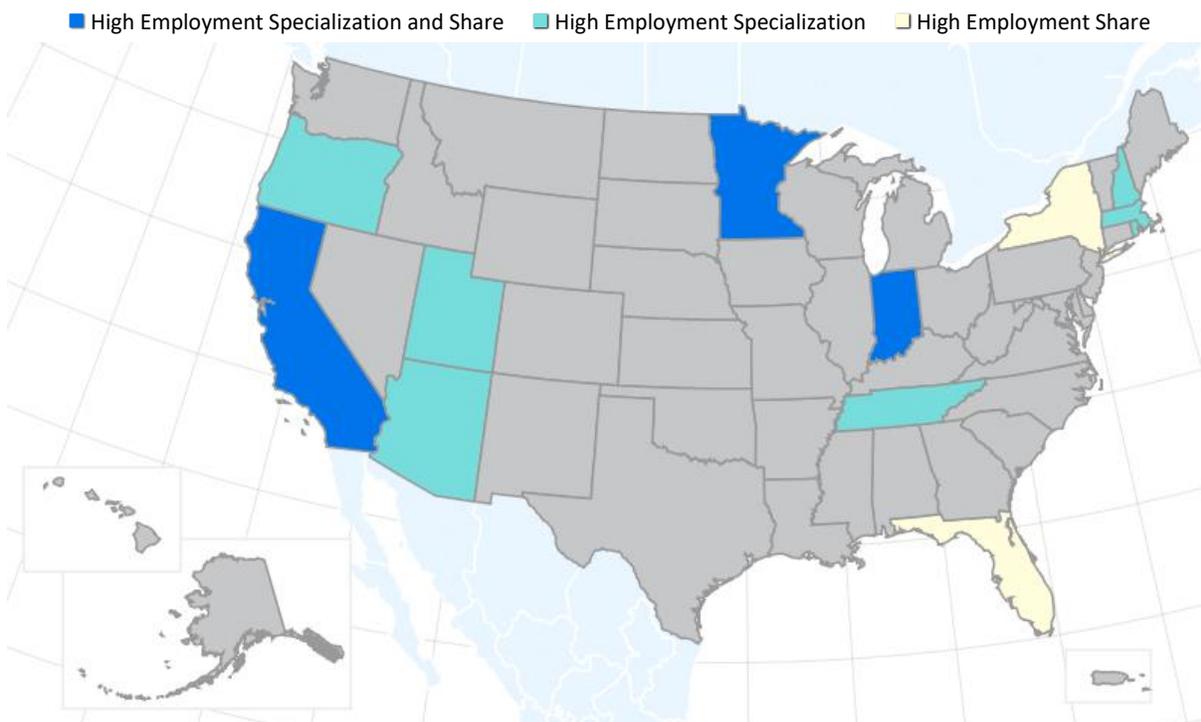
U.S. Industry Report

Medical Devices Cluster

The Medical Devices cluster includes subclusters in Optical Instruments and Ophthalmic Goods as well as Surgical and Dental Instruments and Supplies. This cluster represents industries ranging from Optical Instrument and Lens Manufacturing (NAICS 333314) to Surgical Appliance and Supplies Manufacturing (NAICS 339113). As of 2016, there are **4,943 establishments** across the United States that employ **255,322 professionals**, earning an **average annual wage of \$69,302**. The following three states offer high employment specialization *and* share.

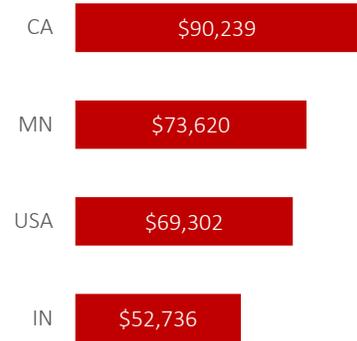
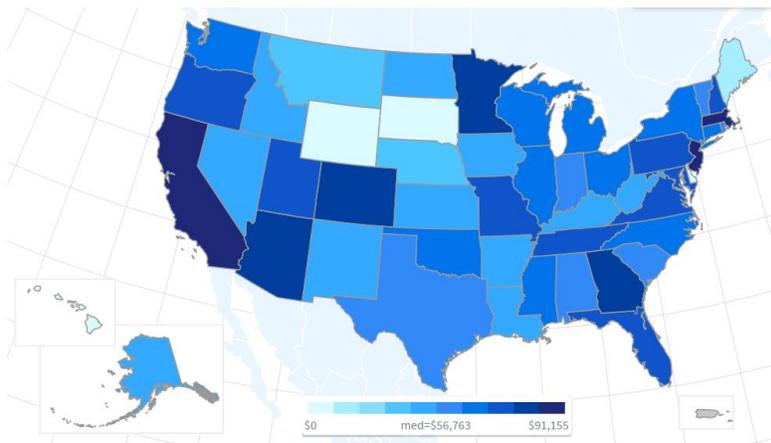
INDIANA	MINNESOTA	CALIFORNIA
Location Quotient 2.9	Location Quotient 2.5	Location Quotient 1.5
Establishments 147	Establishments 192	Establishments 827
Employment 16,840	Employment 13,869	Employment 45,347

Top States by Specialization & Share



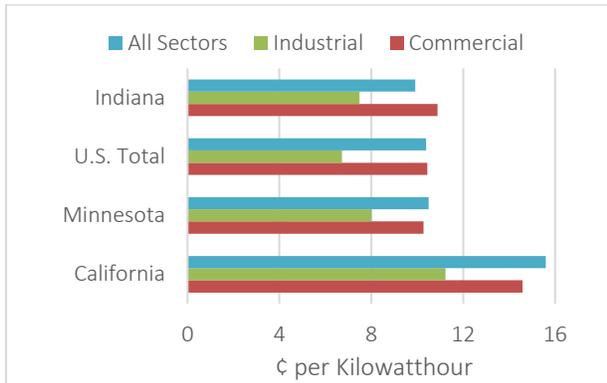
Source: *U.S. Cluster Mapping Project*

2016 Average Annual Cluster Wages



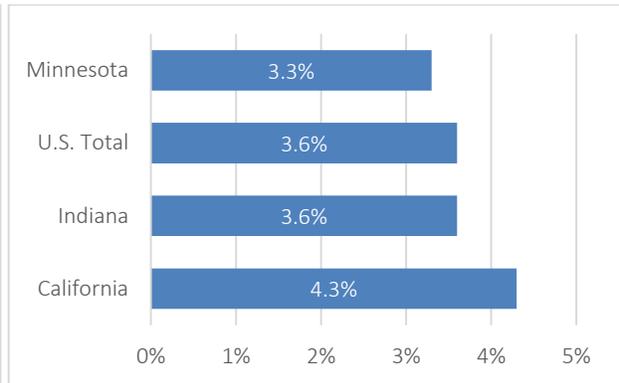
Source: *U.S. Cluster Mapping Project*

Energy Costs (March 2019)



Source: *Energy Information Administration, Electric Power Monthly*

Unemployment Rates (April 2019)



Source: *Bureau of Labor Statistics*

State Cluster Trends (2011-2016)

Highest % ↑ in Employment	WYOMING	IDAHO	HAWAII	ARIZONA	MISSISSIPPI
	25%	10%	8%	6%	6%
2016 Employment	30	357	120	6,975	810
	MINNESOTA	INDIANA	GEORGIA	UTAH	TENNESSEE
Most New Establishments	+15	+10	+8	+8	+5
	192	147	103	79	96
Highest ↑ in Location Quotient	ARIZONA	UTAH	VERMONT	SOUTH DAKOTA	TENNESSEE
	+0.49	+0.46	+0.31	+0.28	+0.18
2016 LQ	1.56	2.88	1.57	1.54	1.54

Source: *U.S. Cluster Mapping Project*

Definitions

Cluster – A cluster is a regional concentration of related industries that arise out of the various types of linkages or externalities that span across industries in a particular location.

Establishment – An establishment is a single physical location at which business is conducted or services or industrial operations are performed. It is not necessarily identical with a company or enterprise, which may consist of one or more establishments. When two or more activities are carried on at a single location under a single ownership, all activities generally are grouped together as a single establishment.

Location Quotient – A location quotient greater than 1 indicates a higher than average cluster concentration in a location.

NAICS – The North American Industry Classification System is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

High Employment Share – States with high employment *share* rank among the top 10 percent of states with employment information by number of employees in an industry.

High Employment Specialization – States with high employment *specialization* have a location quotient ranking among the top 25 percent of states with employment information for an industry.

U.S. States and Territories



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