

# LONG ISLAND INDEX 2007

## APPENDIX A: DATA SOURCES

All public opinion data in this report are from *In a Tough Spot: Jobs, Taxes and Affordability on Long Island*, a regional public opinion survey conducted by Stony Brook University's Center for Survey Research for the Rauch Foundation in Fall 2006. A full copy of survey report is available at [www.longislandindex.org](http://www.longislandindex.org).

### INTRODUCTION

Long Island Profiles of Brightwaters, NY, ([www.LIProfiles.com](http://www.LIProfiles.com)), a private firm that gathers house price sale data from all towns and cities in Long Island each year, provided house price data which was analyzed by Regional Plan Association. Methodology for Map: Housing price bracket data was provided for each zip code, with some exceptions. In some cases, data was provided for a zip code for which a base map was not available. In these cases, the original hamlet name was used to find a proxy zip code.

These cases are listed below:

Original Zip Code Provided with the Data	Original Hamlet Name Provided with the Data	Proxy Town Chosen to Group Data With	Proxy Zip Code Chosen to Group Data With
11975	Wainscott	East Hampton	11937
11972	Speonk	Westhampton Beach	11978
11970	South Jamesport	Riverhead	11901
11962	Sagaponack	East Hampton	11937
11960	Remsenburg	Westhampton Beach	11978
11959	Quogue	Westhampton Beach	11978
11958	Peconic	Southold	11971
11956	New Suffolk	Southold	11971
11947	Jamesport	Riverhead	11901
11932	Bridgehampton	Southampton	11968
11931	Aquebogue	Riverhead	11901
11930	Amagansett	East Hampton	11937
11749	Islandia	Ronkonkoma	11779
11739	Great River	Islip	11751
11569	Point Lookout	Lido Beach	11561
11547	Glenwood Landing	Roslyn Heights	11576
11111	Fire Island	Fire Island	11782
11096	Inwood	Cedarhurst	11516

Difference between 2005 and 2000 in Share of House Prices Under \$250,000 = Share of Single Family Houses Sold in the Zip Code for Under \$250,000 in 2005 – Share of Single Family Houses Sold in the Zip Code for Under \$250,000 in 2000.

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Difference between 2005 and 2000 in Share of House Prices \$500,000 or More=Share of Single Family Houses Sold in the Zip Code for \$500,000 or More in 2005—Share of Single Family Houses Sold in the Zip Code for \$500,000 or More in 2000.

See the “Economy” section of the *Index* for information on all statistics and charts.

Quote from, *America’s High-Tech Economy: Growth, Development and Risks for Metropolitan Areas*, published by Milken Institute, July 13, 1999. [http://www.milkeninstitute.org/pdf/ross\\_report.pdf](http://www.milkeninstitute.org/pdf/ross_report.pdf)

### ***Silicon Valley Housing near Transit and Residential Density***

Data was provided by Joint Venture Silicon Valley Network. See: *Index of Silicon Valley 2006*, [http://www.jointventure.org/publicatons/index/2006 Index/index.html](http://www.jointventure.org/publicatons/index/2006%20Index/index.html).

## **ECONOMY**

### ***Gross Metropolitan Product***

Data were provided by Economy.com. The figures reflect financial transactions in a given sector less the value of intermediate goods and services purchased to facilitate the production. GMP can thus be conceptualized as the net output of an economy or sector and is the sum of labor costs paid to employees and profits retained by firms. GMP data were adjusted for inflation by Economy.com. Data were analyzed by Hofstra University.

### ***Average Annual Employment***

Data were provided by Economy.com. Employment figures are total non-farm private employment, and government and military employment, 1996–2006. Data were analyzed by Hofstra University.

### ***Value Added per Employee***

Value-added data were provided by Economy.com. Value added is the sum of compensation within a sector and profits accrued by firms within that sector. Regional value-added estimates were constructed by Economy.com using productivity estimates at higher geographic levels (state and national) and applying them to employment and wage/income data at the metropolitan level. Data were analyzed by Hofstra University.

### ***Average Pay per Employee and Occupational Salaries and Wages***

Regional average pay data were provided by Economy.com. Average pay per employee was calculated by dividing total annual payroll by total private non-farm (TPNF) employment. Constant-dollar

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transformations were performed by Economy.com. Total annual payroll includes wages, salaries, bonuses and stock options. Occupational wage data were provided by the Bureau of Labor Statistics. BLS-reported wages exclude bonuses and stock options. Data from both sources were analyzed by Hofstra University.

### ***Industry Clusters***

Data were provided by Economy.com. Clusters are sub-sectors of the regional economy made up of interdependent firms in related industries that transact business outside of the local area. Sectors of the economy were combined according to the four-digit NAICS (North American Industrial Classification System) codes to form distinct groupings of firms that are situated similarly in the economy. Appendix B identifies the specific sub-sectors that comprise each cluster. Federal, state and local government includes all civilian employees of government, including teachers and other employees of public school districts, county and state colleges and universities, and employees of local special districts (water, fire, etc.). Cluster groupings are unchanged from the 2006 report and reflect the definitions established by Collaborative Economics. Data for the 2007 report were analyzed by Hofstra University.

### ***Household Income Distribution***

Data are from the March Supplements of the Census Bureau's Current Population Survey (CPS). Household income includes earned and unearned income for all persons living in the same household. Household income was standardized to a four-person unit by doubling household income and dividing it by the square root of the number of household residents. Reported incomes were adjusted for inflation (i.e., converted to 2004 dollars) according to the national Consumer Price Index (all urban consumers) published by the U.S. Bureau of Labor Statistics. Data for each survey year are subject to sampling error. In order to increase the reliability of the reported incomes as estimates of the Long Island population of households, a three-year rolling average was created for each year reported. Each average included the income from the survey of the prior year, current year, and subsequent year. Such data are best used to track trends over longer periods of time, and not year-to-year shifts. Data were analyzed by Hofstra University.

### ***Business Vitality***

The data was provided by the Ewing Marion Kauffman Foundation, and the analysis was carried out by Collaborative Economics. The data was extracted from the Kauffman Financial and Business Research Database (4-17-2006 file). Based on Dun & Bradstreet data, this database is assembled by the Ewing Marion Kauffman Foundation and is specifically conditioned to meet high research standards. The dataset consists of all firms in Nassau and Suffolk Counties and is current up to January 2005.

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### *Venture Capital Financing*

Data are from the PricewaterhouseCoopers/Thomson Venture Economics/National Venture Capital Association/MoneyTree™ Survey and analyzed by Hofstra University.

### *Research and Development Investment*

Data were provided by the RAND Corporation. Figures represent the average annual funding that went to Long Island research universities, labs and corporations. Dollar figures are inflation-adjusted and set to 2004 values. Differences in values from the 2005 report reflect a shift in methodology from reporting total fiscal year funding to average annual funding. Data were analyzed by Hofstra University.

## **OUR COMMUNITIES**

### *Central Business District*

Nassau County: Data on Nassau communities was collected by staff from the Rauch Foundation and Middle Country Public Library, September–October 2006. This is not an exhaustive list of every Nassau downtown business community. The list includes those districts measured by the Long Island Regional Planning Board’s study of vacancy rates completed for Nassau County in 1982, *Commercial Development Analyses*. This was the last time Nassau’s vacancy rates were measured.

Suffolk County: Data on Suffolk communities was collected by the Suffolk County Planning Department, <http://www.co.suffolk.ny.us/planning/retail2006.pdf>, published 2006.

### *Migration Patterns*

Data are from the United States Internal Revenue Service and specifically tracks the number of exemptions on tax returns by county of residence. By tracking year-to-year changes in the residence where returns were filed for specific individuals, the IRS calculates how many people moved to and from individual counties. Data were analyzed by Regional Plan Association.

### *Persons Becoming Legal Permanent Residents*

Data are from the U.S. Citizens and Immigration Services and were analyzed by Regional Plan Association.

### *Race/Ethnicity Share of Population*

Data are from the U.S. Census of Population, 1990 and 2000, and the 2005 American Community Survey, and analyzed by Regional Plan Association.

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### ***Change in Population by Age***

Data are from the U.S. Census of Population, 1990 and 2000, and the 2005 American Community Survey, and analyzed by Regional Plan Association.

### ***Trends in Property and Violent Crime***

Data were compiled from the New York State Division of Criminal Justice Services (<http://www.criminaljustice.state.ny.us>) and the U.S. Census. Data were analyzed by Hofstra University.

### ***Ratio of Median House Value to Median Household Income***

Data were compiled by the Regional Plan Association from the American Community Survey.

Methodology: Ratio = median housing value/median income, for each county and the U.S. Median housing value is measured for owner-occupied housing units. Median income is measured for all households.

In prior years, family income was used to create this ratio. This year, household income is used, and the data shown for prior years has been adjusted for household income. As defined by the U.S. Census, families are a subset of households. Households are defined as any person or people in a housing unit, while families are defined as two or more related people living together (through marriage, birth or kinship). There are 217,000 non-family households in Long Island, comprising about 24% of all households. Household income tends to be lower than family income because it includes those who live alone, many of whom are elderly. Household income is the measure that better reflects more of the people living in Long Island.

### ***Share of Households with a High Housing Cost Burden***

Data were compiled by the Regional Plan Association from the American Community Survey.

Methodology: A household with a high housing cost burden is defined in this case as a household paying 35% or more of income in housing expenses. Both renters and owners are included.

### ***Homes Sold on Long Island***

Long Island Profiles of Brightwaters, NY, ([www.LIProfiles.com](http://www.LIProfiles.com)), a private firm that gathers house sale prices from all towns and cities in Long Island each year, provided house price data. Various census sources were used for the household income data: Census 2000, 2001 Supplementary Survey, and American Community Survey 2002–2005. Data were analyzed by Regional Plan Association.

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Methodology: Prices and income are not adjusted for inflation; the data sets are produced in brackets and accurate adjustments are not possible. Nevertheless, the trends shown on the maps are much more dramatic than the 13% inflation rate between 2000 and 2005. The number of homes for sale below \$250,000, for example, fell by 99% between 2000 and 2005. (There were 23,594 homes for sale below \$250,000 in 2000 and only 131 in 2005.) Only a small part of the overall trend shown in the data is due to inflation.

Comparisons between income and sale prices indicate an affordability gap, based on the assumption that a house should cost approximately 2.5 times a household's income.

### *Income Targeted Housing*

Data Sources: U.S. Department of Housing and Urban Development for data on Federally-subsidized housing; Suffolk County Planning Department for data on non-Federally-subsidized housing; U.S. Census American Community Survey for data on household income by age groups and total number of housing units. Data were analyzed by Regional Plan Association.

Methodology: HUD provides a frequently-updated list of addresses where landlord-based Section 8 vouchers are in use, and where low income housing tax credits were used to finance the residential development. There is a number of units set-aside for lower income households indicated next to each address, along with an indication of whether the units are set-aside for the elderly, disabled population, or families. This list was compared with a list of addresses of income-targeted housing units from the Suffolk Planning Department for both Nassau and Suffolk Counties. These lists combined, with duplications removed, show a total number of 15,916 income-targeted units.

HUD defined very low income households, or those eligible for Section 8 housing, as two person families earning \$35,550 and three person families earning \$40,000. Since data on household income by family size is not available from census, \$30,000 was used as a conservative proxy. Some lower income households, especially elderly households, may have privately-arranged living situations that would disqualify them for the income-targeted housing identified in this section. However, since \$30,000 is a conservative proxy, and since, as noted, the difference between the number of households (147,700) earning under \$30,000 and the number of housing units (16,000) is so large, it is reasonable to characterize the unmet need for income-targeted housing as very large.

### *Food Stamp Recipients*

Data on Food Stamp recipients are from the United States Census Bureau. Data were analyzed by Hofstra University.

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### *Cost of Self-Sufficiency*

The Self-Sufficiency Standard was developed by Dr. Diana Pearce in conjunction with WOW (Wider Opportunities for Women) as part of their Family Economic Self-Sufficiency Project.

The Standard is calculated using actual costs of goods and services purchased in the regular marketplace and reflects actual expenses consumers face. It represents a bare-bones budget; it does not allow for entertainment, carry-out or fast food, savings, credit-card debt, or emergency expenses such as car repairs.

The Standard uses official government data sources and a consistent, national methodology, providing an objective and comparable measure of the true cost of living on a minimally adequate budget, across states.

### *Transit Ridership*

Data were compiled by Regional Plan Association from the National Transit Database, Annual Unlinked Passenger Trips for 1995 to 2005 and Suffolk County Transit and Huntington Area Rapid Transit for 2004 and 2005.

### *Change in Ridership on New York Region Commuter Rail Lines*

Data were compiled by Regional Plan Association from the American Public Transportation Association's Commuter Rail Transit Ridership Report, Fourth Quarters 2000–2005.

### *Change in Number of Vehicles per Household*

Data were compiled by Regional Plan Association from the U.S. Census of Population and American Community Survey.

## **HEALTH**

All data were provided and analyzed by the North Shore-LIJ Health System Planning Office of Strategic Planning and Program Development. Supplementary analyses were provided by Hofstra University.

## **EDUCATION**

All data are from the New York State Education Department. Differences from the 2006 report are based on methodological changes. The 2006 *Long Island Index* reported the average performance of Long Island school districts. The 2007 *Index* reports the performance of students at the level of the

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individual school. School-level data were aggregated to the district level where appropriate. Data were analyzed by Hofstra University.

Performance of LEP students were collected for students at the school level. School-level data were aggregated to the district level where appropriate. Data were analyzed by Hofstra University.

### OUR ENVIRONMENT

#### *Pollution: Air Quality Index*

Data were compiled by Regional Plan Association from U.S. Environmental Protection Agency's Air Quality Index.

#### *Pollution: Water Quality*

Data were compiled by Regional Plan Association from New York State Department of Environmental Conservation 2006 Water Quality Report. Note: The surface water resources within and surrounding Long Island (including Queens and Brooklyn as well as Nassau and Suffolk) are collectively monitored as the Atlantic Ocean/Long Island Sound Basin. This basin, which also includes the coastlines of New York City and Westchester County, is dominated by the estuary/marine waters which cover 905,934 acres (or 1,415 square miles). There are also about 552 miles of freshwater rivers and streams, and 132 significant freshwater lakes, ponds and reservoirs (covering 6,728 acres) in the basin.

#### *Land Protection*

All data was collected and tabulated by Rauch Foundation staff. For the purposes of the *Long Island Index*, preserved land is defined as "open space or farmland that has been preserved by a municipality either through outright acquisition, easement or transfer of development rights."

The numbers reported in the *Index* reflect the best available data to date for the number of acres preserved and the total amount of funds expended on preservation. Data was not available from some municipalities either because data has not been maintained or no land preservation program exists. Data was provided by the following offices:

- New York State, Department of Environmental Conservation, Region #1; 1977–2005
- Suffolk County, Department of Planning; 1977–2005
- Town of Brookhaven, Department of Planning, Environment & Land Management; 2000–2005
- Town of East Hampton, Department of Land Acquisition; 2000–2005

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- Town of Huntington, Town Clerk's Department; 1999–2005
- Town of Riverhead, Planning Department; 1998–2005
- Town of Shelter Island, Town Clerk's Office; 2000–2005 (Note: Shelter Island provided data on acreage only.)
- Town of Southampton, Community Preservation Division; 1999–2005
- Town of Southold, Department of Land Preservation; 1986–2005

In 2004, voters approved environmental bond acts of \$50 million in Nassau County, \$75 million in Suffolk County, \$100 million in the Town of Brookhaven, and \$30 million in the Town of Oyster Bay. In 2006, voters approved an additional \$100 million environmental bond act in Nassau County as well as an extension of the East End Community Preservation Fund. Land preservation efforts resulting from these measures will be reflected in future reports.

### GOVERNANCE

#### *Balance of Payments*

Federal and state taxes and fees paid by Nassau and Suffolk residents and businesses and expenditures received by Long Island from the federal and state government were computed by Regional Plan Association from a range of sources. Federal expenditures received by Nassau and Suffolk are calculated by the U.S. Bureau of the Census and were reported in the *Consolidated Federal Funds Report for 2003*. This source accounts for 85% of federal expenditures. The remainder was assumed to be distributed on the same proportion as reported expenditures. Long Island's share of federal tax revenues were estimated from state-level estimates calculated by the Tax Foundation for 2003. Nassau and Suffolk's share of federal income taxes paid by New York State were assumed to be the same as their share of New York State income taxes. Corporate income and payroll taxes were assumed to be the same as Long Island's share of state payrolls. Excise taxes, the largest portion of which are gasoline taxes, were assumed to be the proportion of state gasoline purchases. Federal estate taxes were assumed to be the same proportion as Long Island's portion of New York State estate taxes.

For New York State revenues, personal income, sales, estate and real estate taxes paid by Long Island residents are actual amounts reported by the New York State Department of Taxation and Finance. Business taxes were assumed to be proportionate to Long Island's share of state payrolls. Motor vehicle and highway taxes were assumed to be proportionate to Long Island's share of motor vehicle registrations. Motor fuel taxes were assumed to be proportionate to the share of gasoline purchases. Other revenues,

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such as lottery proceeds, state fines, bond proceeds, etc. represent about 21% of the total, and were assumed to be proportionate to Long Island's share of the state population. For expenditures that flowed back to Long Island, about 41% of the total represents state aid to counties, municipalities and school districts as reported by the Office of the New York State Comptroller. For other expenditures, those related to higher education were assumed to be proportionate to enrollment in Long Island-based state campuses, those related to business to Long Island's share of payrolls, Medicaid expenditures to Medicaid enrollment, and state government operations to Long Island's share of state government employees. All other expenditures, about 18% of the total, were assumed to be proportionate to Long Island's share of the state's population.

### ***Bond Rating***

Data are from Standard & Poor's and Moody's Investor's Service.

### ***Per Capita and Per Household Property Taxes***

Long Island property tax data is from the New York State Office of the State Comptroller, Detailed Revenue Tables, OSC Code 1001. New York State property tax data is from the New York State Office of the State Comptroller, Financial Data for Local Governments. New York State data includes PILOTS, interest and penalties on real property tax payments, special assessments and other elements excluded from the Nassau and Suffolk data sets. The two lines are therefore not strictly comparable, but should be analyzed for the overall trend. Personal income data is from the U.S. Bureau of Economic Analysis. Population data is from the U.S. Census population estimates program. Household data is from the U.S. Census American Community Survey 2005. Data were compiled and analyzed by Regional Plan Association.

Methodology: Per capita property taxes = aggregate real property taxes/population.

Property taxes as share of personal income = aggregate real property taxes/aggregate personal income.

Per household property taxes, 2004 = aggregate real property taxes 2004/households in 2005. The number of households by county for 2004 was not available.

### ***School Budget Votes***

Data are from The New York State Education Department.

## APPENDIX B: INDUSTRY CLUSTER DEFINITIONS

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Cluster definitions were provided by Collaborative Economics for the *Long Island Index 2007*.

### **Finance and Insurance**

- 5211 Monetary Authorities—Central Bank
- 5221 Depository Credit Intermediation
- 5222 Non-depository Credit Intermediation
- 5223 Activities Related to Credit Intermediation
- 5231 Securities and Commodity Contracts Intermediation and Brokerage
- 5232 Securities and Commodity Exchanges
- 5239 Other Financial Investment Activities
- 5241 Insurance Carriers
- 5242 Agencies, Brokerages and Other Insurance Related Activities
- 5251 Insurance and Employee Benefit Funds
- 5259 Other Investment Pools and Funds
- 5412 Accounting, Tax Preparation, Bookkeeping and Payroll Services

### **Creative Services**

- 5122 Sound Recording Industries
- 5413 Architectural, Engineering and Related Services
- 5414 Specialized Design Services
- 5416 Management, Scientific and Technical Consulting Services
- 5418 Advertising and Related Services
- 7111 Performing Arts Companies
- 7112 Spectator Sports
- 7114 Agents and Managers for Artists
- 7115 Independent Artists, Writers and Performers

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### **Diversified Manufacturing**

- 3149 Other Textile Product Mills
- 3169 Other Leather and Allied Product Manufacturing
- 3256 Soap, Cleaning Compound and Toilet Preparation Manufacturing
- 3259 Other Chemical Product and Preparation Manufacturing
- 3322 Cutlery and Hand Tool Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3325 Hardware Manufacturing
- 3332 Industrial Machinery Manufacturing
- 3333 Commercial and Service Industry Machinery Manufacturing
- 3335 Metalworking Machinery Manufacturing
- 3339 Other General Purpose Machinery Manufacturing

### **Education and Training**

- 5111 Newspaper, Periodical, Book and Directory Publishers
- 6111 Elementary and Secondary Schools (Note: This includes private institutions only; it does not include public school teachers or personnel.)
- 6112 Junior Colleges
- 6113 Colleges, Universities and Professional Schools
- 6114 Business Schools and Computer and Management Training
- 6115 Technical and Trade Schools
- 6116 Other Schools and Instruction
- 6117 Educational Support Services

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### Information Services

- 5112 Software Publishers
- 5152 Cable and Other Subscription Programming
- 5161 Internet Publishing and Broadcasting
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5173 Telecommunications Resellers
- 5175 Cable and Other Program Distribution
- 5179 Other Telecommunications
- 5181 Internet Service Providers and Web Search Portals
- 5182 Data Processing, Hosting and Related Services
- 5191 Other Information Services
- 5415 Computer Systems Design and Related Services

### Health

- 3391 Medical Equipment and Supplies Manufacturing
- 5417 Scientific Research and Development Services
- 6211 Offices of Physicians
- 6212 Offices of Dentists
- 6213 Offices of Other Health Practitioners
- 6214 Outpatient Care Centers
- 6215 Medical and Diagnostic Laboratories
- 6216 Home Health Care Services
- 6219 Other Ambulatory Health Care Services
- 6221 General Medical and Surgical Hospitals
- 6222 Psychiatric and Substance Abuse Hospitals
- 6223 Specialty (except Psychiatric and Substance Abuse) Hospitals
- 6231 Nursing Care Facilities
- 6232 Residential Mental Retardation, Mental Health and Substance Abuse Facilities
- 6233 Community Care Facilities for the Elderly
- 6239 Other Residential Care Facilities
- 8122 Death Care Services

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### **Transportation Services**

- 3366 Ship and Boat Building
- 4811 Scheduled Air Transportation
- 4812 Non-scheduled Air Transportation
- 4821 Rail Transportation
- 4831 Deep Sea, Coastal and Great Lakes Water Transportation
- 4832 Inland Water Transportation
- 4851 Urban Transit Systems
- 4852 Interurban and Rural Bus Transportation
- 4853 Taxi and Limousine Service
- 4854 School and Employee Bus Transportation
- 4859 Other Transit and Ground Passenger Transportation
- 4881 Support Activities for Air Transportation
- 4882 Support Activities for Rail Transportation
- 4883 Support Activities for Water Transportation
- 4884 Support Activities for Road Transportation
- 4885 Freight Transportation Arrangement
- 4889 Other Support Activities for Transportation
- 4922 Local Messengers and Local Delivery

### **Visitors**

- 4870 Scenic and Sightseeing Transportation
- 5615 Travel Arrangement and Reservation Services
- 7121 Museums, Historical Sites and Similar Institutions
- 7131 Amusement Parks and Arcades
- 7132 Gambling Industries
- 7139 Other Amusement and Recreation Industries
- 7211 Traveler Accommodation
- 7212 RV (Recreational Vehicle) Parks and Recreational Camps
- 7221 Full-Service Restaurants
- 7222 Limited-Service Eating Places
- 7224 Drinking Places (Alcoholic Beverages)

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### **Business Services**

- 3231 Printing and Related Support Activities
- 5331 Lessors of Non-financial Intangible Assets (except Copyrighted Works)
- 5411 Legal Services
- 5419 Other Professional, Scientific and Technical Services
- 5511 Management of Companies and Enterprises
- 5611 Office Administrative Services
- 5612 Facilities Support Services
- 5614 Business Support Services
- 5619 Other Support Services

### **Technology/Manufacturing**

- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications and Equipment Manufacturing
- 3343 Audio and Video Equipment Manufacturing
- 3344 Semiconductor and other Electronic Component Manufacturing
- 3345 Navigational, Measuring, Electromedical and Control Instruments Manufacturing
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 3353 Electrical Equipment Manufacturing
- 3364 Aerospace Product and Parts Manufacturing