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I am pleased to share the Governor’s Action Team (GAT) annual report for fiscal year 2020-2021.

The mission of GAT is to support the attraction of businesses to Pennsylvania and the expansion of businesses currently operating in Pennsylvania. The fiscal year 2020-2021 began in July 2020 – a time of continued uncertainty surrounding the COVID-19 pandemic. But as the whirlwind months of Spring 2020 turned to summer and fall and the business community learned to adapt to the evolving pandemic landscape, businesses once again began looking toward their long-term futures. That meant businesses were eager to resume relocation and expansion plans previously put on hold due to the pandemic – or begin bold new plans as the economic future came into clearer focus.

As a result, GAT has worked harder than ever to ensure Pennsylvania captured the opportunities to bring new businesses to the commonwealth and expand existing ones. And that hard work led to a substantially higher number of projects completed, dollars invested, and jobs created compared to the previous fiscal year. GAT supported the completion of 58 projects leading to nearly 10,000 pledged new jobs and more than 33,000 pledged retained jobs – totaling over $3.8 billion in investment into the commonwealth.

This report provides additional detail on GAT’s results this year, including major job creation projects like First National Bank’s new headquarters office tower in Pittsburgh; family-owned Clemens Food Group expanding its production in Montgomery County; Nestle Purina PetCare expanding production lines in Cumberland County; Ball Corporation and CANPACK Group establishing aluminum canning operations in Northeast Pennsylvania; and so many other examples of businesses choosing Pennsylvania as the best operating location for sustainable long-term growth.

Though the pandemic still presents supply chain issues and other disruptions for businesses in all sectors, companies are transforming challenges into opportunities. Company executives not only seek competitive and business-friendly locations, but also partners to help advance their goals. In collaboration with other state agencies and a network of accomplished service delivery providers throughout the commonwealth, GAT proudly shares our Pennsylvania story and the many advantages for businesses to choose to invest right here.

The Governor’s Action Team continues to stand ready to support businesses seeking to expand their operations, increase productivity, and expand global competitiveness. Our team looks forward to the fiscal year ahead and the bright future of Pennsylvania’s economy.

Brent K. Vernon
Executive Director
Governor’s Action Team
GROWING FROM WITHIN

The majority of financial assistance through the Governor’s Action Team during FY 2020-2021 was provided to companies as an incentive to expand within the state.
In FY 2020-2021 the economic development professionals of the Governor’s Action Team (GAT) engaged in over 197 business leads resulting in discussions with 100 companies with defined projects prepared to consider relocating to or expanding within Pennsylvania. Customized assistance packages were offered to companies for 43 projects that were ready to proceed, 58 projects were successfully completed, and 31 GAT projects were publicly announced by Governor Wolf during this period.

**New Job Creation and Retained Jobs Pledged by Project Type**
*FY 2020-2021*

Fifty-two percent (4,979) of all new jobs pledged to be created were considered as part of new operations established in Pennsylvania, and 37% (3,531) of new jobs pledged were associated with expansions by established businesses within Pennsylvania.
In FY 2020-2021, 36% of Pennsylvania’s assistance to GAT projects comprised of Redevelopment Assistance Capital Program (RACP) while almost a quarter of assistance was Pennsylvania Industrial Development Authority (PIDA) loans (24%). Over 98% of the $3.87 billion in total capital investment during this fiscal year was private investment. Recovering from the COVID-19 pandemic, Pennsylvania achieved the 2nd highest private investment total in the Wolf administration to date with $3.87 billion in private investment - trailing only behind FY 2015-2016 when the Shell Petrochemical Complex was announced.

Successfully Completed Projects
FY 2020-2021

Every $1 PA State Incentive Funds Awarded Leveraged $63.90 in New Private Investment*

* State incentives include grants and tax credits (excludes state loans). Total private investment equals project cost less state incentives (includes state loans).
Total Capital Investment (Project Cost)

Wolf Administration to Date

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Private Investment</td>
<td>$198,740,869</td>
<td>$6,903,034,190</td>
<td>$1,554,304,740</td>
<td>$1,061,868,307</td>
<td>$1,558,592,571</td>
<td>$807,552,035</td>
<td>$3,879,473,396</td>
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<tr>
<td>State Incentives</td>
<td>2.60%</td>
<td>0.40%</td>
<td>3.50%</td>
<td>3.10%</td>
<td>2.49%</td>
<td>2.62%</td>
<td>1.65%</td>
</tr>
<tr>
<td>State Loans</td>
<td>4.10%</td>
<td>0.20%</td>
<td>1.80%</td>
<td>4.10%</td>
<td>3.20%</td>
<td>3.09%</td>
<td>0.48%</td>
</tr>
<tr>
<td>Private Investment</td>
<td>93.30%</td>
<td>99.30%</td>
<td>94.70%</td>
<td>92.80%</td>
<td>94.31%</td>
<td>96.91%</td>
<td>99.52%</td>
</tr>
<tr>
<td>Jobs Created / Retained</td>
<td>1,466 / 5,442</td>
<td>6,920 / 12,076</td>
<td>8,592 / 36,126</td>
<td>6,339 / 14,214</td>
<td>6,012 / 21,029</td>
<td>3,926 / 16,545</td>
<td>9,554 / 33,641</td>
</tr>
</tbody>
</table>

* State incentives include grants and tax credits (excludes state loans). Total private investment equals project cost less state incentives (includes state loans).

** FY 2015-16 reflects the Shell Pennsylvania Petrochemicals Complex project in Beaver County announced in June 2016.

*** Represents January - June of fiscal year.
The relocation or expansion of a business in Pennsylvania has far-reaching ripple effects on the state’s economy as businesses bring new jobs to the commonwealth and commit to retaining existing jobs. The 9,554 pledged new jobs created, and 33,641 existing jobs retained by GAT projects in FY 2020-2021 are expected to create or support more than 70,494 additional jobs and generate as much as $619.7 million in state and local tax revenue each year as their effects ripple through the state’s economy.

GAT’s 58 successfully completed projects in FY 2020-2021 are estimated to affect a total of **113,689 jobs in Pennsylvania’s economy.**

![Effects of Project Activity on Pennsylvania’s Economy](image)

**How the Effects of New and Retained Jobs Ripple Through the State’s Economy**

- **Initial Effect:** The initial effect represents the initial change in jobs, earnings, and sales.

- **Direct Effect:** The first round of ripple effects is the new purchase of goods, supplies, and services by the business as a result of the initial effect.

- **Indirect Effect:** The next round of effects is the subsequent ripple further down the supply chain resulting from the direct effects.

- **Induced Effect:** The next round of effects is the impact of the new earnings created by the initial, direct, and indirect changes. These earnings enter the economy as employees spend their paychecks in the region on housing, food, clothing, and other goods and services.

*Source: EMSI*
## JOBS & WAGES BY INDUSTRY

The Northeast Region with 25% and Southcentral Region with 21% led the Commonwealth in job creation. The Manufacturing Industry’s largest job creation regions were the Northeast with 27% and Lehigh Valley with 20%.

### JOBS CREATED AND RETAINED BY FACILITY USE/FUNCTION AT PROJECT SITE FY 2020-2021

<table>
<thead>
<tr>
<th>Facility Use/Function</th>
<th>% of Total Jobs Created</th>
<th>New Jobs Created</th>
<th>Existing Jobs Retained</th>
<th>Total Jobs</th>
<th>Annual Payroll for New Jobs</th>
<th>Weighted Avg. Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warehouse &amp; Distribution</td>
<td>29%</td>
<td>2,780</td>
<td>13,449</td>
<td>16,229</td>
<td>$112,087,298</td>
<td>$51,606</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>51%</td>
<td>4,850</td>
<td>11,680</td>
<td>16,530</td>
<td>$215,455,659</td>
<td>$48,225</td>
</tr>
</tbody>
</table>

### WAREHOUSE & DISTRIBUTION

- New Jobs Created: 2,780
- Existing Jobs Retained: 13,449
- Total Jobs: 16,229
- Annual Payroll for New Jobs: $112,087,298
- Weighted Avg. Wage: $51,606

### MANUFACTURING

- New Jobs Created: 4,850
- Existing Jobs Retained: 11,680
- Total Jobs: 16,530
- Annual Payroll for New Jobs: $215,455,659
- Weighted Avg. Wage: $48,225
**Jobs & Wages by Industry**

**Food Processing**

- % of Total Jobs Created: 4%
- New Jobs Created: 361
  - Northeast: 75
  - Lehigh Valley: 70
  - Southeast: 87
  - Southcentral: 129
- Existing Jobs Retained: 3,512
- Total Jobs: 3,873
- Annual Payroll for New Jobs: $10,946,987
- Weighted Avg. Wage: $38,067

**Computer Information & Systems Technology**

- % of Total Jobs Created: 6%
- New Jobs Created: 555
  - Southwest: 250
  - Southeast: 305
- Existing Jobs Retained: 1,300
- Total Jobs: 1,855
- Annual Payroll for New Jobs: $20,740,000
- Weighted Avg. Wage: $68,000

**Regional & National HQ**

- % of Total Jobs Created: 10%
- New Jobs Created: 1,008
  - Northeast: 479
  - Southwest: 160
  - Northwest: 90
  - Southeast: 279
- Existing Jobs Retained: 3,070
- Total Jobs: 4,708
- Annual Payroll for New Jobs: $68,579,718
- Weighted Avg. Wage: $65,951
Initial new jobs created by GAT projects and the economic activity they stimulated helped to bolster the state’s economy and reduced the total number of unemployed Pennsylvanians.
A snapshot of unemployment trends shows that as of June 2021, nearly 361,000 Pennsylvania workers were unemployed. Through the attraction of private investment by new and expanding businesses creating additional employment opportunities for Pennsylvanians, the estimated economic activity created by companies assisted by GAT is projected to help bolster the state’s ongoing recovery from the COVID-19 Pandemic.

### Jobs Created by GAT Projects Compared to Pennsylvania Unemployed Workers by Sector (NAICS Code)
#### FY 2020-2021

<table>
<thead>
<tr>
<th>Industry</th>
<th>New Jobs Pledged by Successfully Completed Projects</th>
<th>Number of Unemployed Workers in Pennsylvania</th>
<th>% of Pennsylvania Unemployed Workers</th>
<th>% of Unemployed Workers in the U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>5,581</td>
<td>38,302</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>2,721</td>
<td>27,023</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>439</td>
<td>8,063</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>430</td>
<td>12,723</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Information</td>
<td>250</td>
<td>3,645</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>133</td>
<td>9,881</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>-</td>
<td>900</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Mining, Quarrying, and Oil and Gas Extraction</td>
<td>-</td>
<td>2,651</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Utilities</td>
<td>-</td>
<td>607</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>-</td>
<td>34,002</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>222,839</td>
<td>62%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>9,554</strong></td>
<td><strong>360,636</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

*Source: EMSI*

### Annual Unemployment Trends

*Average through June

*Source: US Bureau of Labor Statistics*

### Total New Payroll at Project Sites (Annual)

- **$427 MILLION**
  - Total New Payroll at Project Sites (Annual)

- **$1.69 BILLION**
  - New Earnings from Projects

**Earnings include wages and salaries, supplements to wages and salaries (e.g. employer contributions to employee pension and insurance funds as well as employer contributions to government social insurance) and proprietors’ earnings

*Source: EMSI*
Successfully completed projects during FY 2020-2021 pledged to create 9,554 new jobs at project sites across the state. In addition, companies associated with these projects also committed to retaining 33,641 jobs within the Commonwealth. Regarding job creation, projects in three regions accounted for nearly 66% of all new jobs pledged to be created: Northeast – 2,362 (24%), Southcentral – 2,046 (21%), and Leigh Valley – 1,873 (20%).

Locations of Successfully Completed Projects*

* Locations are based on a per project basis using the location by physical address of the pledged jobs created.
The jobs resulting from expansion and location projects in FY 2020-2021 are mostly clustered in the Lehigh Valley, Southcentral and Southeast regions of Pennsylvania. Retained jobs played a significant role in successfully completed projects.
Manufacturing projects dominated job creation in every region, especially in the Northeast with over 1,300 jobs pledged to be created. Projects in the Lehigh Valley Region have over 900 manufacturing jobs pledged to be created with the Central and Southeast Regions each having more than 500 new manufacturing jobs expected to be created by businesses.

**Central Region**
- Jobs Created: 549
- Jobs Retained: 2,218
- Total Jobs Created and Retained: 2,767
- Ripple Effect Jobs: 3,237
- Jobs Multiplier: 2.17
- Average Wage (jobs created): $56,095
- Total Project Cost: $165,307,000
- Total State Assistance: $2,111,800

**Lehigh Valley Region**
- Jobs Created: 1,873
- Jobs Retained: 8,780
- Total Jobs Created and Retained: 10,653
- Ripple Effect Jobs: 13,582
- Jobs Multiplier: 2.27
- Average Wage (jobs created): $52,487
- Total Project Cost: $570,887,352
- Total State Assistance: $13,318,667

**Northeast Region**
- Jobs Created: 2,362
- Jobs Retained: 2,622
- Total Jobs Created and Retained: 4,984
- Ripple Effect Jobs: 6,064
- Jobs Multiplier: 2.22
- Average Wage (jobs created): $42,267
- Total Project Cost: $1,193,719,612
- Total State Assistance: $14,806,100

Source: EMSI
**SOUTHCENTRAL REGION**

- Jobs Created: 2,046
- Jobs Retained: 8,358
- Total Jobs Created and Retained: 10,404
- Ripple Effect Jobs: 20,281
- Jobs Multiplier: 2.95
- Average Wage (jobs created): $46,958
- Total Project Cost: $785,149,657
- Total State Assistance: $18,481,267

**SOUTHEAST REGION**

- Jobs Created: 1,579
- Jobs Retained: 6,499
- Total Jobs Created and Retained: 8,078
- Ripple Effect Jobs: 14,273
- Jobs Multiplier: 2.77
- Average Wage (jobs created): $60,179
- Total Project Cost: $783,056,264
- Total State Assistance: $19,312,267

**NORTHWEST REGION**

- Jobs Created: 282
- Jobs Retained: 766
- Total Jobs Created and Retained: 1,048
- Ripple Effect Jobs: 6,064
- Jobs Multiplier: 2.22
- Average Wage (jobs created): $57,550
- Total Project Cost: $24,970,000
- Total State Assistance: $3,757,000

**SOUTHWEST REGION**

- Jobs Created: 863
- Jobs Retained: 4,398
- Total Jobs Created and Retained: 5,261
- Ripple Effect Jobs: 11,512
- Jobs Multiplier: 3.19
- Average Wage (jobs created): $55,752
- Total Project Cost: $356,383,510
- Total State Assistance: $10,763,600

Source: EMSI
**PROJECT HIGHLIGHTS**

**CANPACK GROUP**

Olyphant Borough, Lackawanna County

CANPACK Group is a leading multinational manufacturer of aluminum & metal cans and bottles for the food & chemical industries. The company will establish its U.S. headquarters and first state-of-the-art manufacturing facility in Olyphant Borough, Lackawanna County. As a result, CANPACK’s investment will also serve to remediate a 102-acre brownfield site. Pennsylvania was selected by CANPACK after an extensive national search due in part to its proximity to major population centers, existing robust infrastructure, and a highly skilled and available manufacturing workforce.

- **Project Type**: New Operation
- **Capital Investment**: $365,888,533
- **State Assistance**: $6,000,000
- **Jobs Created**: 437
- **Average Wage**: $50,372

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**BALL METAL BEVERAGE CONTAINER CORPORATION**

Jenkins Township, Luzerne County

Ball is a Fortune 500 company and one of the world's leading suppliers of aluminum packaging for the beverage, personal care and household products industries. The company acquired a redeveloped 1,078,799 sq. ft. state-of-the-art industrial building on 100 acres in Jenkins Township, Luzerne County to manufacture aluminum cans for the food packaging industry. This project is providing family sustaining wages and showcases the impact of Pennsylvania's strong food and beverage manufacturing industry that is attracting supply chain companies like Ball into the Commonwealth. The project further demonstrates the demand for more recyclable packaging solutions and Pennsylvania's ability to attract these types of forward-thinking companies that are meeting the increased demand for packaged beverage products in a sustainable way.

- **Project Type**: New Operation
- **Capital Investment**: $421,000,000
- **State Assistance**: $2,400,000
- **Jobs Created**: 231
- **Average Wage**: $69,593
Clemens Food Group
Hatfield, Montgomery County
Clemens Food Group is a sixth-generation family-owned business with over 100 years of pork processing experience operating in Pennsylvania. The company will replace and expand its current smoked meats and cooked sausage capabilities by building a new facility at its Hatfield, Montgomery County location. In addition to creating new jobs, this project also expands support for Pennsylvania’s agricultural community and Clemens’ own network of farms by sourcing locally grown hogs. Clemens decision to expand in Pennsylvania during the pandemic is an indication of the resilience of the food manufacturing supply chain in the commonwealth and demonstrates the benefit of long-standing supply-chain relationships with the local farming community.

Project Type .................Expansion
Capital Investment ........... $228,490,000
State Assistance .............. $2,715,400
Jobs Created ....................87
Jobs Retained .................2,634
Average Wage ................. $30,204

F.N.B. Corporation
Pittsburgh, Allegheny County
A Joint Venture comprised of F.N.B. Corporation, Pittsburgh Arena Real Estate Development LP and The Buccini/Pollen Group, will develop the FNB Financial Center, a 26-story, 547,888-square-foot office tower in Pittsburgh that will include 471,890 square feet of Class A office space, 20,000 square feet of retail space on the first floor, and two floors of parking. F.N.B., established more than 150 years ago in Greenville, PA, will consolidate its headquarters operation from multiple locations on the City’s North Shore and occupy roughly 40% of the new building along with a retail banking branch in the lobby. The office tower will feature state of the art technologies which include enhanced filtration, UV lights, as well as Bipolar Ionization to improve indoor air quality. The office tower will be built on a portion of the 28-acre Lower Hill Redevelopment site that was the location of the former Civic Arena. This development will bridge the historic Hill District with the central business district and the development group committed to more than 45 percent MWBE (Minority/Woman-Owned Business Enterprise) participation in the total development effort.

Project Type .................Expansion
Capital Investment ........... $220,471,187
State Assistance .............. $10,000,000
Jobs Created ....................160
Jobs Retained .................2,898
Average Wage ................. $89,108
NESTLE PURINA PETCARE COMPANY

Hampden Township, Cumberland County
Nestle Purina PetCare Company, the largest dry dog and cat food manufacturer in the U.S., is investing $165 million to add two extruder banks and three additional packing lines to its existing facility in Hampden Township, Cumberland County. With 25 locations in North America, the company chose Pennsylvania for this expansion due in part to the strong manufacturing workforce and strategic location to consumer markets. Between the project location and the company’s Allentown operations, Nestle Purina PetCare employs nearly 800 people in Pennsylvania.

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Investment</td>
<td>$166,000,000</td>
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<tr>
<td>State Assistance</td>
<td>$470,000</td>
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<tr>
<td>Jobs Created</td>
<td>94</td>
</tr>
<tr>
<td>Jobs Retained</td>
<td>782</td>
</tr>
<tr>
<td>Average Wage</td>
<td>$42,606</td>
</tr>
</tbody>
</table>

HALL TECHNICAL SERVICES, LLC
Grove City, Mercer County
Hall Industries, Inc., a family-owned engineering and manufacturing company operating in Western Pennsylvania for more than 50 years, purchased a 468,000 square-foot facility and property known as the Cooper Industrial Commons in Grove City, Mercer County to streamline and expand operations in Pennsylvania. Hall Industries offers an array of services and support for the aviation industry, including the engineering and design of components, mechanical improvements, service, and ground and maintenance support at airports. In addition to the new jobs created, Hall’s investment will result in remediation and other improvements to the industrial property in Grove City.

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Investment</td>
<td>$11,810,000</td>
</tr>
<tr>
<td>State Assistance</td>
<td>$3,487,000</td>
</tr>
<tr>
<td>Jobs Created</td>
<td>57</td>
</tr>
<tr>
<td>Jobs Retained</td>
<td>184</td>
</tr>
<tr>
<td>Average Wage</td>
<td>$51,213</td>
</tr>
</tbody>
</table>

SHARP CORPORATION
Conshohocken Borough, Montgomery County
Sharp Corporation has maintained a strong presence in Pennsylvania since its founding in Conshohocken Borough (Montgomery County) in 1952. The company has established a stellar reputation as a global leader in advanced clinical supply chain services and contract pharmaceutical packaging. For this project, Sharp will increase its manufacturing capacity by upgrading and partially re-purposing some of its four-facility Allentown campus, upgrade and obtain new machinery and equipment for its two-facility Conshohocken Borough (Montgomery County) site, and carry out building improvements and obtain new machinery and equipment at its recently acquired 170,000 sq. ft. facility in Macungie Borough (Lehigh County).

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Expansion</th>
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<tbody>
<tr>
<td>Capital Investment</td>
<td>$42,900,000</td>
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<tr>
<td>State Assistance</td>
<td>$2,060,400</td>
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<tr>
<td>Jobs Created</td>
<td>335</td>
</tr>
<tr>
<td>Jobs Retained</td>
<td>1,092</td>
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<tr>
<td>Average Wage</td>
<td>$42,100</td>
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