PRESENT
Dr. Mary Bolt (Cecil College), JoAnn Dawson (Fairwinds), Danny DeMarinis (URP), Sandra Edwards (Economic Development Manager), Bruce England (SWN), Paula Gilley (Citizen), Michael Lara (Northrop Grumman), Sandy Maruchi-Turner (Tourism Manager), Morgan Miller (CCPL), Chris Moyer (Director, Economic Development), Robert Palsgrove (WSFS), Michael Ratchford (W.L. Gore & Associates), Dr. Carl Roberts (Roberts Consulting), Rupert Rossetti (Citizen), Dan Schneckenburger (County Council), Mike Travers (Cecil Dancenter)

ABSENT
Walter Buck (Citizen), Linda Burris (Delmarva Power), Scott Holland (i-Lighting), Woody Jackson (Citizen), Grove Miller (Citizen), Dr. Rich Szumel (Union Hospital)

GUESTS
Matt Cabrey ((Select Greater Philadelphia Council), Joe DiNunzio (Artesian Water), Vince Fiorelli (Chesapeake Utilities), Dr. Jeffrey Lawson (CCPS), Alan McCarthy (Cecil County Executive), Alan Sexton (SWN), David Strouss (McCrone), Scott Sturgill (Cecil Bank), Katie Tabeling (Cecil Whig)

Call to Order & Welcome
- Meeting called to order at 8:04 a.m.
- Introductions made by all in attendance
- September 5, 2018 meeting minutes approved

Chairman’s Report – Mike Ratchford
- Going to yield time this morning to Alan McCarthy.

County Executive’s Report - Alan McCarthy
- A lot of exciting things happening and many more on the way
- Last Thursday we broke ground on Elkton West Sanitary Sewer Project; cut ribbon on new synthetic turf field at Bo Manor High (important because many fields are unusable because of flooding issues)
- Toured two facilities in Principio in Opportunity Zone with Senator Scott (SC) & Congressman Andy Harris, one of which was Clene Nanomedicine that performs medical scientific research and the other that makes human replicas to teach young doctors how to heal combat wounds

Director’s Report – Chris Moyer
- Big events coming up in October:
  - CoreNet conference in Boston – large group of site selectors
  - Fair Hill International – BIG event in Cecil County
    - 3 Star Event – October 19-21
      - as it evolves into a 4 Star and hopefully a 5 Star in next few years, could mean millions of dollars of economic impact
    - Had great Broker Event – Thank you to everyone who attended, who spoke, everyone who sponsored, great article (Katie); have had great feedback
• We will be creating an electronic database of real estate opportunities – looking forward to next year – great effort all around!

“At the Heart of Good Business, Greater Philadelphia: The Place to Establish and Grow your Business” was presented by Matt Cabrey, Executive Director of the Select Greater Philadelphia Council

• Matt touched on the following points in his presentation:
  • Business is greater here – What Select Greater Philadelphia (Select) is and what they do
    • Cecil County has not previously been on their radar until now – that is starting to change
  • Strategic Location
  • Powerful Market
  • Greater Philadelphia
  • Best Value in the Northeast
  • Diverse Economy – Job Shares
  • Key Sectors in the Region
  • Talented Workforce
  • World Class Talent
  • Home to Top Ranked Universities
  • Global Access Supported by a Dynamic Regional Infrastructure
    • Air, Sea, Rail, Highway, East Coat Gateway to the World
  • Manufacturing: Food, Philadelphia Produce Terminal
  • Life Sciences: Firsts in Healthcare
  • Energy Renaissance: PECO/Exelon, Marcellus & UTICA Shale, Philadelphia Energy Solutions & More
  • New Philadelphia
  • Transformations: People, Places
  • Looking Ahead
  • Collaborative Community

A copy of this handout is available on our website.

An Update was Given by Economic Development Manager Sandra Edwards

• Housing Shortage – Residential Event planned for October 25th @ Schaefer’s 9am–Noon
  • Try to bring builders and developers in from Cecil County and beyond to raise awareness in terms of what we have and what we see we need in next 10 years with business expansions
  • Will talk about what is happening here in Cecil County
  • Incentives towns are offering to help spur housing/new development
  • Tons of lots through final plat process that are ready to go
  • Permitting stage and fees associated seem to be stagnating builders from taking on new construction
  • Need to understand issues in order to deal with need for housing
  • Live / Work / Play
  • Hope event will be start of dialogue to raise awareness and understand the issues that are facing the County for housing given what’s anticipated with economic growth and workforce needs
  • This will be joint effort of County co-hosting with the towns
• Towns will have tables at the event – last 45-60 minutes of event will be networking time to be able to chat with the towns
• Working on Enterprise Zone expansions which will include Chesapeake Overlook in Perryville and North East Commons in North East

Subcommittee Reports:
Education/Workforce – Bruce England
• Committee met; talked about collaboration, industry needs, workforce needs.
• Need to increase awareness of these programs and what they address.
• How to get more residents interested in jobs available here.
• Opportunities that exist and letting people know about them.
• How to attract more interest of people to work in this area.
• Live / Work / Play
• Ideas / discussions on the table.

Technology – Danny DeMarinis
• Last meeting mentioned funding Incubator 2-phase study problematic.
• Sandra pursuing funding sources.
• Turns out there are three efforts ongoing that help budding firms in Cecil County that help startups:
  • Deftec, Tedco, and NMTC
    • For all three organizations, we need to better understand what they are doing for our startups and how we can better help facilitate that process

Land Use – Rupert Rossetti
• Live / Work / Play Concept
• Wilmington Riverfront – Opened walking trail – from City of Wilmington to Old New Castle
• Cecil County has an asset – old rail system – fair amount still owned by County – might take a look at it
• Fair Hill International –
  • Horse inspection Wednesday, Oct. 17th
  • Competition starts Oct. 18th
  • Triathlon of equestrian sports
  • 3 Star and Young Event Horse (4 and 5 yr. old horses – see if they have what it takes to be an event horse)
  • 30th Anniversary
  • Thank our Sponsors
  • New Tents for Sponsors and Owners
  • 15% more Competitors than Last Year
  • Lack of Fiber for Broadcasting – Will have Closed Circuit TV
  • Live Broadcasting for Cross Country (Red Bull Day)

Finance – Bob Palsgrove
• Have first application for Cecil Catalyst (Revolving Loan Fund)
• Bumped into an attorney in Elkton who is working with someone who is looking to put in an application

Communications – JoAnn Dawson
• New Cecil County video (90-second video) – working on 15 to 30-second finishes
• Branding initiative meeting tomorrow

**Council Report – Dan Schneckenburger**
• Passed Enterprise Zone expansions in North East and Perryville – can move forward with application
• NMTC have a STEM Summit on Oct. 17th at CCST.

The report will be available via OED website.

**Adjournment**
Meeting adjourned at 9:29 a.m.

*Our next EDC meeting will be on November 7, 2018 at 8:00 a.m. at Cecil College, Room TC208.*

Respectfully Submitted,

Terri Springel
Administrative Assistant
At the Heart of Good Business

Greater Philadelphia: The Place to Establish and Grow your Business

Cecil County, Maryland

Economic Development Commission

October 3, 2018

Presented by the Cecil County Economic Development Team
Select Greater Philadelphia (Select) is a business attraction marketing organization created to market the region’s business opportunities to attract new companies and to support local business growth. Select works to effectively market Greater Philadelphia’s 11 counties, as one economic unit, to businesses looking to relocate or expand into the region.
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And Cecil County, Too!
Greater Philadelphia’s geographic position in the heart of the Northeast USA - with 40% of the U.S. population within a day’s drive – and 60% of North America within a two hour flight – is an advantage in terms of both market access and strong economic activity.
Strategic Location

- Located between New York City - the nation’s financial hub & Washington, D.C. - the legislative & regulatory center of the US
- At the core of the country’s wealthiest and most densely-populated region
### Powerful Market

#### Market Size within 200 Miles of Major U.S. Cities

<table>
<thead>
<tr>
<th>City</th>
<th>Population (in millions)</th>
<th>Income (in $ trillions)</th>
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</thead>
<tbody>
<tr>
<td>New York</td>
<td>53.7</td>
<td>3.17</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>53.8</td>
<td>3.13</td>
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<tr>
<td>Washington D.C.</td>
<td>44.6</td>
<td>2.39</td>
</tr>
<tr>
<td>Boston</td>
<td>34.0</td>
<td>2.08</td>
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<td>Los Angeles</td>
<td>25.9</td>
<td>1.25</td>
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<tr>
<td>Detroit</td>
<td>20.9</td>
<td>1.02</td>
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<tr>
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<td>23.9</td>
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<td>Dallas</td>
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<tr>
<td>Houston</td>
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<tr>
<td>San Francisco</td>
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<td>0.79</td>
</tr>
<tr>
<td>Miami</td>
<td>13.1</td>
<td>0.61</td>
</tr>
</tbody>
</table>
# Greater Philadelphia

<table>
<thead>
<tr>
<th>Metric</th>
<th>Amount</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>6.3 million</td>
<td>5th</td>
</tr>
<tr>
<td>Labor Force</td>
<td>3.3 million</td>
<td>6th</td>
</tr>
<tr>
<td>Personal Income</td>
<td>$368 billion</td>
<td>7th</td>
</tr>
<tr>
<td>Gross Regional Product</td>
<td>$432 billion</td>
<td>8th</td>
</tr>
</tbody>
</table>
Best Value in the Northeast
Compared to Boston, New York and Washington DC, Greater Philadelphia has the lowest:

- Wage & salary costs
- Office rental rates
- Industrial rental rates
- Cost of living
- Median housing sales price

Cost of Living Difference Compared to Greater Philadelphia

- New York: +25%
- Washington D.C.: +23%
- Boston: +21%
- Los Angeles: +17%

Source: Council for Community and Economic Development
Diverse Economy – Job Shares

Greater Philadelphia Employment by Sector, 2016 Q2

- Education & Health Services: 26.42%
- Trade, Transportation & Utilities: 19.07%
- Professional & Business Services: 17.63%
- Government: 4.68%
- Leisure & Hospitality: 4.92%
- Financial Activities: 4.59%
- Manufacturing: 6.05%
- Other Services: 5.89%
- Construction, Natural Resources & Mining: 9.06%
- Information: 4.68%

Source: JobsEQ
Key Sectors in the Region

Employment Shares by Industry

- Health Care and Social Assistance: Greater Philadelphia 18.06%, USA 14.0%
- Educational Services: Greater Philadelphia 9.39%, USA 8.3%
- Professional, Scientific, and Technical Services: Greater Philadelphia 7.74%, USA 6.5%
- Finance and Insurance: Greater Philadelphia 6.07%, USA 4.0%
Talented Workforce
World Class Talent

Education Pipeline:

- Over 100 Degree-Granting Institutions
- Approximately 440,000 full & part-time students
- Over 89,000 Degrees & Certificates Awarded
Home to Top Ranked Universities
Global Access
Supported by a Dynamic Regional Infrastructure
Greater Philadelphia is a *the* east coast gateway to the world with excellent connectivity. As a top 3 emerging logistics hub in the USA and top 20 in the world, the region has international airports*, two class 1 railroads, major highway access, 3 major ports, fiber connectivity and more.
5 international airports within 90-minute drive

PHL Airport:
- International Hub for American Airlines
- Regional Hub for UPS Airlines
- 27 carriers with 524 daily departures to 129 cities
- 37 international destinations

Source: Philadelphia International Airport
American Airlines opens its first facility for healthcare materials in PHL Airport

- Only temperature-controlled facility of its kind in the Northeast corridor
- 25,000-square-foot
- Located in Cargo City at the PHL International Airport
- 3 Major Ports with 30+ active port terminals
- Delaware River’s $330M project to dredge over 100 miles of river from 40 to 45 ft. is 75% complete
- Port of Philadelphia: 5 years of double-digit cargo growth
Amtrak Train: New York and Washington, DC in 1.5 hours
Two Class 1 freight railroads - CSX and Norfolk Southern

Did you know?

Philadelphia’s 30th street station is Amtrak’s 3rd busiest train station?

Source: Visit Philadelphia
Highway

- Convenient access to I-95, I-80, I-78, NJ & PA Turnpikes
- Improved Connectivity for I-95

Image: PA Turnpike
East Coast Gateway to the World

In the heart of the world’s 5th largest economy

- with 40% of the U.S. population within a day’s drive
- 60% of the U.S. and Canadian populations accessible via a 2-hour flight
- Largest contiguous refrigerated facility in North America: Philadelphia Wholesale Produce
- Amazon’s 4 massive warehouses
- Port of Philadelphia’s 52-acre forest-products facility
MANUFACTURING
Top manufacturing sectors in Greater Philadelphia:

- Chemicals (including pharmaceuticals)
- Fabricated Metals
- Food manufacturing
- Computer and electronic goods
- Transportation equipment
Food Manufacturing

- Hatfield Quality Meats
- Campbell Soup
- Flowers Foods
- Herr Foods Inc.
- Dietz & Watson, Inc.
- Clement Pappas & Company, Inc.
- J & J Snack Foods Corp.
- Amoroso’s Baking Co.
- Frankford Candy LLC
- PEPSI-COLA & National Brand Beverages Ltd
- Puratos
- Dr. Schär
- Universal Pasteurization
Philadelphia Produce Terminal

- Largest refrigerated wholesale produce terminal in the US
- 700,000-sq-ft of air conditioned space
Life Sciences
Firsts in Healthcare:

- 1st Hospital
  Pennsylvania Hospital

- 1st Medical College
  University of Pennsylvania

- 1st Pharmacy School
  University of the Sciences

- 1st Cancer Treatment Center
  Fox Chase Cancer Treatment Center

- 1st Private Biomedical Research Center
  The Wistar Institute

- 1st Non-profit, independent College of Optometry
  Salus University

Source: U.S. History
7 medical schools, 3 pharmacy schools, 2 dental schools, 2 schools of podiatric medicine, schools of optometry and veterinary medicine

5 children’s hospitals

4 National Cancer Institute (NCI) designated centers

The nation’s first medical school: University of Pennsylvania School of Medicine

A total of 16 medical institutions in the Greater Philadelphia Region

7 Medical Schools
- Cooper Medical School at Rowan
- Drexel University
- Philadelphia College of Osteopathic Medicine
- Rowan University School of Osteopathic Medicine
- Temple University
- Thomas Jefferson University
- University of Pennsylvania

3 Pharmacy Schools
- University of the Sciences
- Temple University
- Thomas Jefferson University

2 Dental Schools
- Penn Dental Medicine
- Temple University

School of Podiatric Medicine
- Temple University

School of Optometry
- Salus University

Veterinary Medicine Leader
- University of Pennsylvania School of Veterinary Medicine
Energy Renaissance
Electricity / Gas
- Reliable
- Accessible
- Affordable
- Sustainable

PECO / Exelon

PJM Interconnection – Grid distributor for East Coast
Marcellus & UTICA Shale

- Largest natural gas field in the United States located in Western Pennsylvania
- Downstream opportunities in the Greater Philadelphia Region: manufacturing, chemicals, NGLs
- Bolstered by superior infrastructure: Top 3 emerging logistics hubs in the USA
Processes 350,000 barrels of crude oil per day

Largest oil refining complex on the Eastern seaboard

8th largest refiner in the US

Driving energy hub using Marcellus Shale natural gas to produce motor fuels, electricity, and chemicals

More: MHIC / Braskem / Monroe
Vacant industrial land sites and redevelopment parcels along the Delaware River in NJ/DE/PA

MHIC NGL-related project opportunities

PES natural gas feedstock projects (700+ acres)

Others include Southport Marine Terminal, Keystone Industrial Port Complex, Eagle Point, Edgemoor on the Delaware, First State Crossing
New Philadelphia
Population growth in the City over past decade:

*First Time in 60 years*

- Fastest Millennial growth rate of any of nation’s 30 largest cities
- College graduate retention is higher at 64%
- Pew Poll: residents have a more positive outlook about the city than ever

Sources: 2015 City Commerce Department, Pew, 2015 Campus Philly Report
Transformations: Places

- Comcast’s 2nd Tower: technology innovation
- Navy Yard: a hub for innovation in diverse sectors
- University City: job growth; 63% more jobs per square mile than Cambridge, MA
- Real Estate Growth: International developers investing in Philadelphia for the first time in 20 years

“Philadelphia is now the No. 1 destination for expat 20-somethings from Brooklyn”

– Kevin Gillen, Meyers Research LLC

Sources: University City District 2015 report; WSJ
Transformations: Places

New Live-Work-Play Developments

- Philadelphia County: Schuylkill Yards, Market East, NoLib, uCity Square, Market East
- Montgomery County: Conshohocken
- Chester County: Great Valley Corporate Center
- Camden County: Camden City “tipping point” bringing unprecedented transformational change
- New Castle County: Market Street renewal
Opening of Comcast Innovation & Technology Center
Return of the Four Seasons
Renaissance of Camden
I-95 Connectivity
Philadelphia International Airport Expansion
Deepening of the Delaware River
Philadelphia hosted the 2017 NFL Draft over a three day festive gathering.

Pope Francis chose Philadelphia as the 1st city in the U.S. to host the World Meeting of Families in 2015.

Philadelphia hosted the 2016 Democratic National Convention.

In 2015, Philadelphia was named the first U.S. World Heritage City.

Lonely Planet named Philadelphia the #1 place to visit on its 2016 “Best in the U.S.” list.

James Beard Award Winners!

*Three in 2017*

*One in 2018*

Pope Francis chose Philadelphia as the 1st city in the U.S. to host the World Meeting of Families in 2015.
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Thank You