Comprehensive Economic Development Strategy

5 YEAR VISION

CEDS
Presented by the
Regional Economic Development Center

2015

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Acknowledgements

Introduction

The Regional Economic Development Center of Southern New Hampshire (REDC) is pleased to present the 2015 Comprehensive Economic Development Strategy (CEDS). This plan reflects the results of the grass roots visioning process we go through every five years as we assess our needs as a region and come up with new goals and objectives.

REDC, a non-profit organization incorporated in 1994, seeks to promote responsible, sustainable economic development activities within its southern New Hampshire based region. REDC's focus is on creating jobs for low- to moderate-income people by accessing alternative financing for business and industrial expansion or relocations, which in turn provides tax relief for our communities and our region. REDC operates a multi-million dollar loan fund which facilitates our job creation goals through alternative lending.

Since May 2010, REDC has managed a $1.825M Revolving Loan Fund (RLF) grant awarded by the U.S. Environmental Protection Agency (EPA). The Brownfields RLF is used to capitalize a revolving loan fund from which the REDC provides low-interest loans and sub-grants to conduct cleanup activities of contaminated sites for the purposes of redevelopment. REDC also recently received Community Development Finance Institution (CDFI) designation which will allow us to continue to broaden our economic impact throughout the region.

As part of its economic development efforts, REDC completes and submits an updated CEDS to the Department of Commerce, Economic Development Administration (EDA) annually. The CEDS emerges from a continuous planning process developed with broad based and diverse community participation

that addresses the economic problems and potential of an area. The strategy promotes sustainable economic development and opportunity, fosters effective transportation systems, enhances and protects the environment, and balances resources through sound management and development.

Through the CEDS planning process, REDC and its partners develop a set of regional goals on a five-year cycle.

The current goals, listed on the facing page, were developed this spring through a public visioning process. In the CEDS, we present the state of our region, along with projects and programs that help satisfy the CEDS goals.

The CEDS region is comprised of the 37 municipalities that make up Rockingham County, together with the towns of Hudson, Litchfield, Merrimack, and Pelham and the city of Nashua (all within eastern Hillsborough County). For the purposes of demographic analysis, the region is divided into three subregions, as shown below.

Western CEDS Region
Central CEDS Region
Eastern CEDS Region
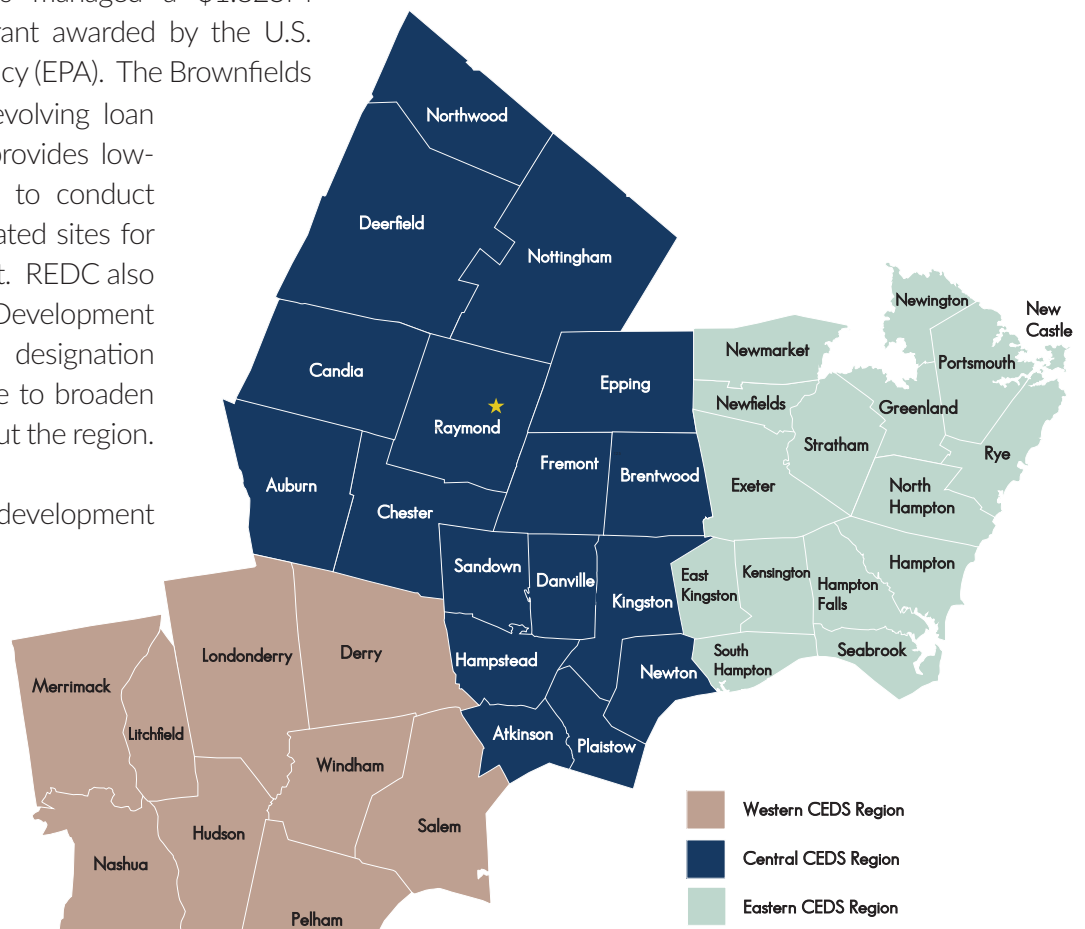
2015 - 2019 CEDS Goals and Objectives

Infrastructure Development

To invest in infrastructure improvements, such as roads, bridges, sewers, water facilities, and broadband, and multi-modal transportation systems that will strengthen and diversify the regional economy.

Regional Cooperation

To develop cost-effective regional solutions to local problems as a means to improve municipal budgets and maintain the quality of life in the region.

Workforce Attraction & Retention

To attract and retain a skilled workforce by providing the necessary support in the form of housing, education and training, networking, transportation options, and cultural/social opportunities.

Affordable Housing

To develop diversified housing options for all income levels to ensure the availability of workers for expanding businesses and new firms in the region.

Sustainable Living

To maintain the unique qualities of life in southern New Hampshire through sustainable living best management practices, the preservation of natural and historic resources, and a balanced approach to economic development.

Background Conditions

Regional Geography

The Regional Economic Development Center of Southern New Hampshire (REDC) CEDS region is comprised of the 37 municipalities of Rockingham County, plus the towns of Hudson, Litchfield, Merrimack, Pelham, and the city of Nashua, all located in eastern Hillsborough County. There are two cities (Portsmouth and Nashua) and 40 towns. The total area of the region is 853 square miles which includes an inland water area of 33.6 square miles. The region is located in southeastern New Hampshire, bordered by the Atlantic Ocean on the east; Essex County, MA on the south; Hillsborough County, NH on the west; and Strafford County, NH on the north. The center of the region is approximately equidistant (60 miles) from Boston, MA and Portland, ME, and approximately 30 miles east of Manchester (see regional map). According to the U.S. Census, the population of the CEDS region was 452,846 persons in 2010, and estimated at

455,704 persons in 2013 (NH Office of Energy and Planning population estimates).

The western and southern sections of the region are part of the middle and lower Merrimack River Valley areas, respectively. The eastern portion is part of the Piscataqua River Basin, except for the coastal communities, which drain directly to the Atlantic Ocean. A portion of the city of Nashua is part of the Nashua River Basin.

The region has one central/urban city: Nashua. The more populous Massachusetts communities to the south heavily influence the southern portion of the region. Historically they have been both the source of employment for many southern NH residents, but also a major source of population growth from in-migration into the region.

The Piscataqua River, which forms the border between Maine and New Hampshire, drains into the Gulf of Maine through Portsmouth Harbor. Portsmouth Harbor is the only major port between Portland, ME, and Boston, MA. The 18-mile coast-line is the smallest for any of the 23 coastal U.S. states.

For the purposes of developing the original CEDS document, REDC divided Rockingham County into three subregions of roughly equal size. These subregions, called the "Seacoast", "Central" and "West" subregions, were established based upon such factors as
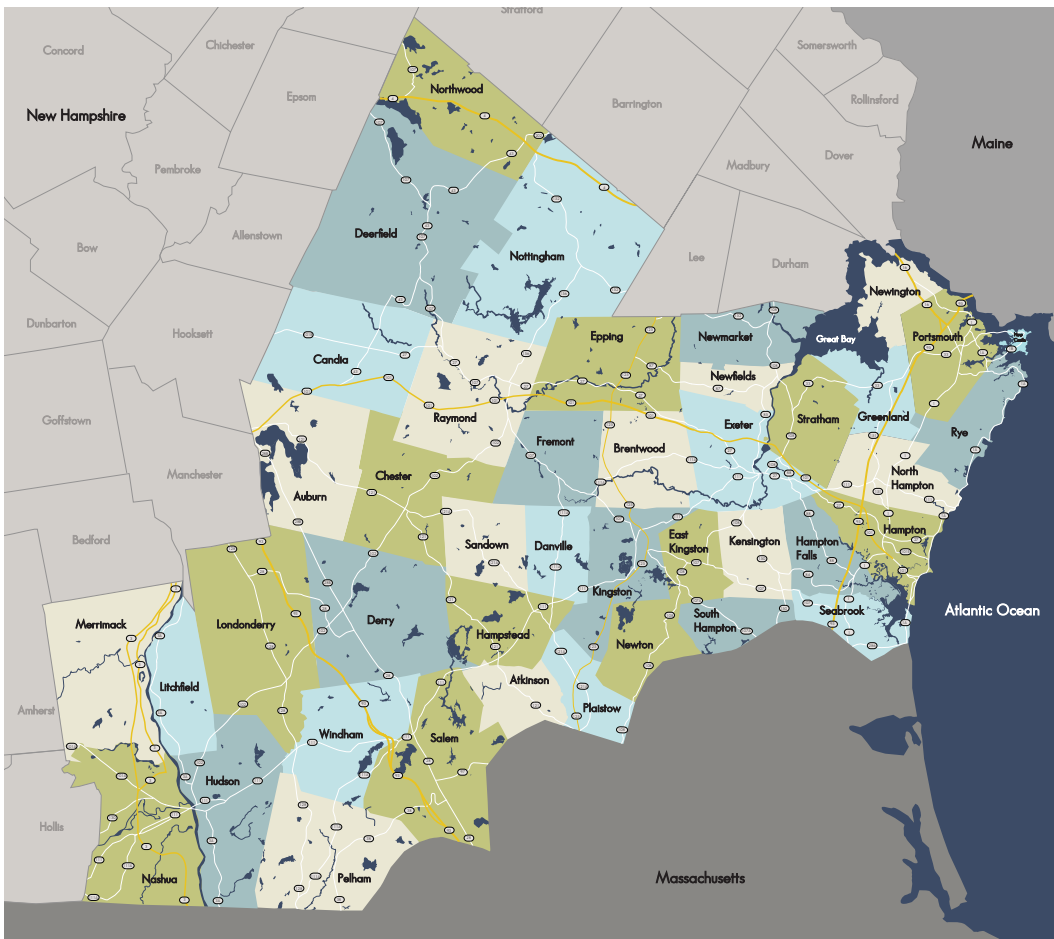
transportation infrastructure, institutional service areas, labor market areas and other socio-economic associations. The "Seacoast" subregion was later renamed the "Eastern" subregion.

With the inclusion of five additional communities in 2010, these subregions were adjusted. The new communities added only approximately 19% in land area; however, increased the total population by over 50%. Since 2010, the three subregions have remained unchanged and remain useful in analyzing differing growth and development trends affecting the region, as well as in characterizing the strengths, weaknesses, and needs of different parts of the region. The subregions are depicted on the map to the right.
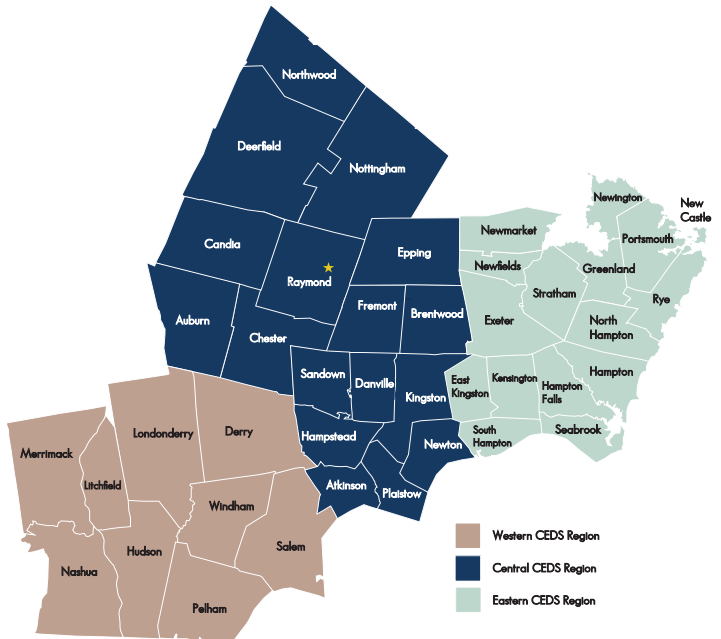
New England City and Town Areas (NECTAs)

The United States Office of Management and Budget (OMB) delineates metropolitan and micropolitan statistical areas according to standards that are applied to Census Bureau data. The general concept of a metropolitan or micropolitan statistical area is that of a "core area containing a substantial population nucleus, together with adjacent communities having a high degree of economic and social integration with that core." In the six New England states, this is further addressed by the use of the New England City and Town Areas (NECTAs). NECTAs are created using the same criteria as metropolitan and micropolitan statistical areas based, respectively, on the presence of either an urbanized area of 50,000 or more population or an urban cluster of at least 10,000 but less than 50,000 population. If the specified criteria are met, a NECTA containing a single core with a population of at least 2.5 million may be subdivided to form smaller groupings of cities and towns referred to as New England city and town area divisions.

Since the 2010 CEDS was prepared, a change has been made in the NECTAs based on the 2010 Census. The OMB revised the old and created new statistical areas, which were effective as of February 2013. These changes are intended to reflect changes in employment and commuting patterns, as well as any changes to the economic and social integration with the core community.

For statistical and data gathering purposes, the New Hampshire Employment Security Economic & Labor Market Information Bureau (ELMI) uses the NECTAs: subdivided into the Metropolitan and Micropolitan NECTAs. Additionally, areas that do not fall into either of the these categories are placed into a Labor Market Area.

The following definitions of the NECTAs and subdivisions are provided by ELMI:

Metropolitan NECTA: These areas consist of a core urban area with population of 50,000 or more, plus contiguous cities and towns that have a high degree of social and economic integration with the urban core as measured by commuting patterns. New Hampshire includes all or part of three Metro NECTA.

Metropolitan NECTA Division: A Metropolitan NECTA containing a single core urban area with a population of at least 2.5 million may be subdivided into NECTA Divisions. NECTA Divisions consist of a core urban area plus contiguous MCDs, all of which are included in the larger Metro NECTA, and must have a total population of 100,000 or more. The core urban area of a NECTA Division must have population of 50,000 or more, with the highest rate of out-commuting to any other city or town less than 20 percent. NECTA Divisions function as distinct social, economic, and cultural areas within the larger metropolitan region. New Hampshire

includes portions of four NECTA Divisions, all of which are subdivisions of the Boston-Cambridge-Nashua MA-NH Metropolitan NECTA.

Micropolitan NECTA: These areas consist of a core urban area with a population of at least 10,000 (but less than 50,000), plus contiguous cities and towns that have a high degree of social and economic integration with the urban core as measured by commuting patterns. This area type was defined for places that behave similarly to a large metropolitan area, but have a much smaller population. New Hampshire includes all or part of five Micro NECTA.

Labor Market Areas (LMA): These areas do not meet the OMB minimum core population standard of at least 10,000 residents, but are socially and economically integrated regions, as measured by commuting patterns, within which workers can change jobs without changing place of residence. LMA, also known as small labor market areas, are defined independently by the U.S. Department of Labor, Bureau of Labor Statistics with input from state labor market information agencies. New Hampshire includes all or part of 16 LMA.

As mentioned above, there are three Metropolitan NECTAs partially within New Hampshire. Two NECTAs partially fall within the REDC region: the Boston-Cambridge-Quincy and Portsmouth NECTAs. Additionally, the Dover-Durham NECTA also falls partially within the state, north of the REDC region. The NECTA divisions within the REDC region are listed on the following table of communities.

Key:
HC = Hillsborough County
RC = Rockingham County
NRPC = Nashua Regional Planning Commission
RPC = Rockingham Planning Commission
SNHPC = Southern New Hampshire Planning Commission
SRPC = Strafford Regional Planning Commission

NECTA Regions:
11 = Haverhill-Newburyport-Amesbury, MA-NH NECTA Division
16 = Lawrence-Methuen-Salem, MA-NH NECTA Division
19 = Lowell-Billerica-Chelmsford, MA-NH NECTA Division
20 = Manchester Metropolitan NECTA
22 = Nashua NH-MA NECTA Division
26 = Portsmouth NH-ME Metropolitan NECTA
27 = Raymond LMA

Town/City	County	Regional Planning Comm.	Subregion	NECTA Div.
Atkinson	RC	RPC	Central	11
Auburn	RC	SNHPC	Central	20
Brentwood	RC	RPC	Central	26
Candia	RC	SNHPC	Central	20
Chester	RC	SNHPC	Central	22
Danville	RC	RPC	Central	11
Deerfield	RC	SNHPC	Central	27
Derry	RC	SNHPC	West	22
East Kingston	RC	RPC	East	11
Epping	RC	RPC	Central	26
Exeter	RC	RPC	East	26
Fremont	RC	RPC	Central	11
Greenland	RC	RPC	East	26
Hampstead	RC	RPC	Central	11
Hampton	RC	RPC	East	26
Hampton Falls	RC	RPC	East	11
Hudson	HC	NRPC	West	22
Kensington	RC	RPC	East	11
Kingston	RC	RPC	Central	11
Litchfield	HC	NRPC	West	22
Londonderry	RC	SNHPC	West	22
Merrimack	HC	NRPC	West	22
Nashua	HC	NRPC	West	22
New Castle	RC	RPC	East	26
Newfields	RC	RPC	East	26
Newington	RC	RPC	East	26
Newmarket	RC	SRPC	East	26
Newton	RC	RPC	Central	26
North Hampton	RC	RPC	East	24
Northwood	RC	SRPC	Central	27
Nottingham	RC	SRPC	Central	27
Pelham	HC	NRPC	West	19
Plaistow	RC	RPC	Central	11
Portsmouth	RC	RPC	East	26
Raymond	RC	SNHPC	Central	27
Rye	RC	RPC	East	26
Salem	RC	RPC	West	16
Sandown	RC	RPC	Central	11
Seabrook	RC	RPC	East	11
South Hampton	RC	RPC	East	11
Stratham	RC	RPC	East	26
Windham	RC	SNHPC	West	22

Regional Population

Historical Population Growth

For most of the past half century, southeastern New Hampshire, as represented by Rockingham and Hillsborough Counties, has experienced rapid population growth. As shown in the following figure, both Rockingham and Hillsborough Counties experienced rapid and sustained population growth that began in 1950 and continued to the early part of the century. From 1950 to 2010 the REDC region quadrupled in population, growing from approximately 112,500 to over 452,800 people. However, growth in the region has slowed down considerably and even stopped since 2000, as shown in the figure below.

Historical Population Counts

Source: U.S. Census Bureau

Population Estimates

Source: NH OEP

During the first half of the last century, the REDC CEDS region amounted to approximately 20% of the overall New Hampshire population (shown in figure below).
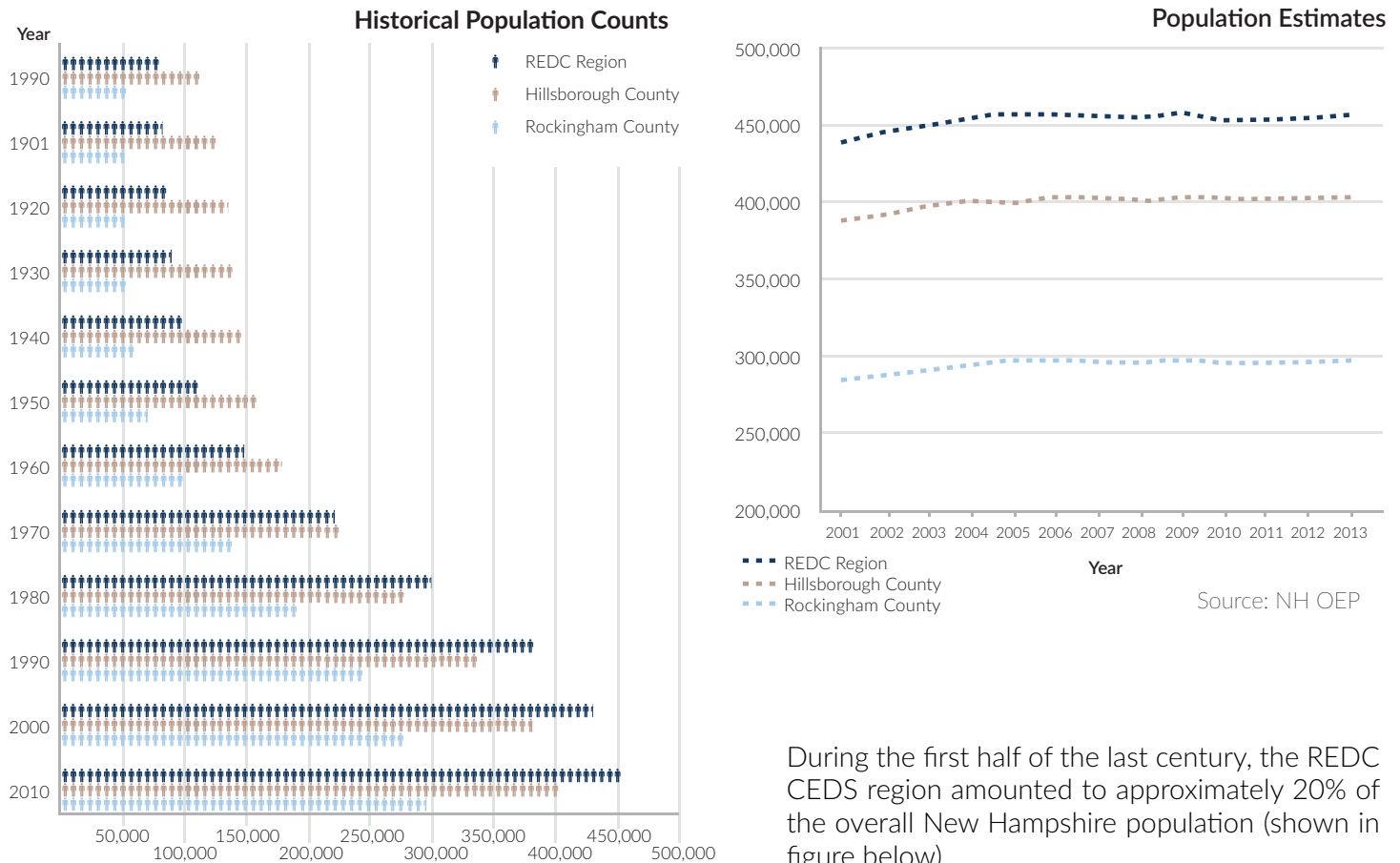
As the population boom began in the 1950s, the region grew faster than the rest of New Hampshire and currently amounts to just over one-third of the total state population.

The Western subregion historically has been the most densely settled part of the region and experienced the post-war

Source: U.S. Census Bureau

REDC Region as % of Total State Population
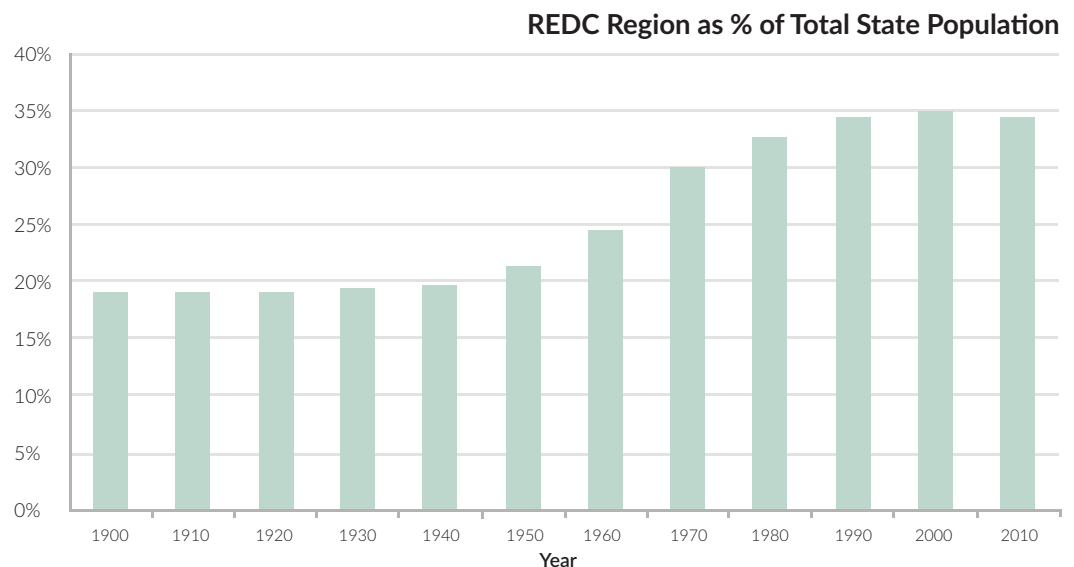
Background Conditions

growth earliest, primarily due to the location of the state's second largest city, Nashua. As shown in the figure below, at the start of the 1950s the Western region had approximately 15,800 more persons than that of the Eastern subregion and was roughly equal in size to the remaining two subregions combined. However, by 2010, after nearly 60 years of sustained rapid growth, the Western subregion is now 30% larger than the total of the Eastern and Central subregions combined, with the Central subregion nearly identical to the Eastern subregion population.

Population Growth by CEDS Subregion

U.S. Census Counts

- - - Eastern Communities
- - - Central Communities
- - - Western Communities
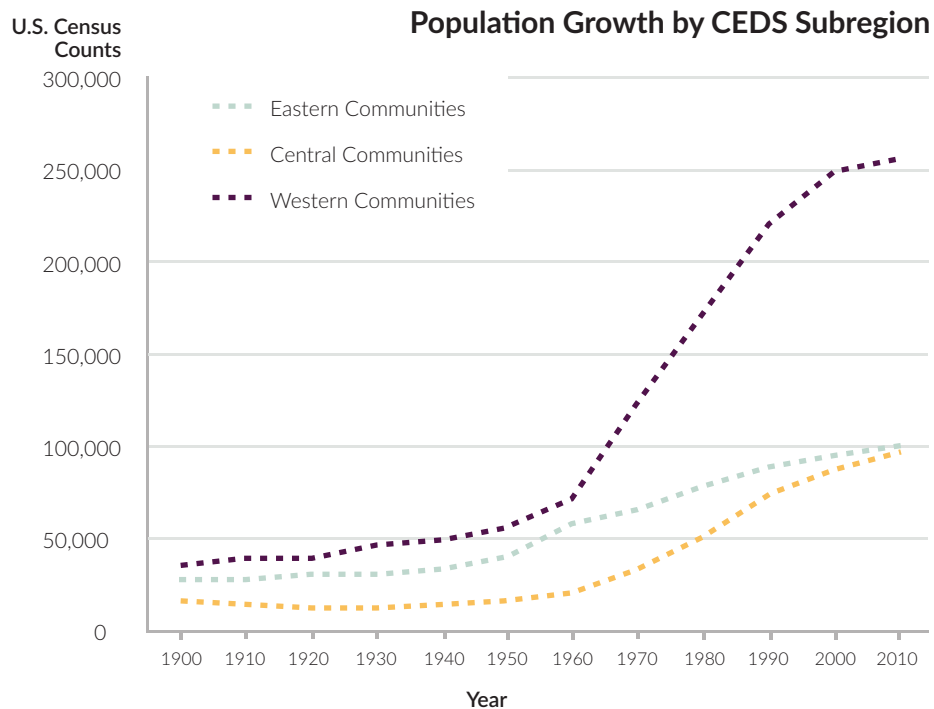
Year

As is the case with the entire state, population growth has slowed down in the CEDS region over the past 10 years. A comparison of growth rates for the subregions, counties, and state indicates that although the Western subregion has experienced tremendous growth during the last half of the previous century, it is in fact the Central subregion that is growing at the fastest rate, especially in the past decade. The Central subregion is also the only area of the CEDS region continuing to grow at a faster pace than the state.

Source: U.S. Census Bureau

Town/Area	Growth Rate 1900-1950	Growth Rate 1950-2010	Growth Rate 2000-2010
Eastern Communities	43%	149%	5%
Central Communities	9%	467%	11%
Western Communities	58%	361%	3%
REDC Region	43%	302%	5%
Hillsborough County	39%	155%	5%
Rockingham County	37%	321%	6%
New Hampshire	29%	148%	7%

Source: U.S. Census Bureau

Current Population

The NH Office of Energy and Planning (NH OEP) publishes population estimates for New Hampshire cities and towns on an annual basis. The annual estimates are based on survey responses received from cities and towns regarding numerical changes in constructed housing units (both additions and demolitions). Results are converted to population estimates based on current person-per-household data. As such these are not enumerated counts as compared to the Census, but annual estimates based on building permits. The results are calibrated to the U.S. Census counts of housing units in decennial census years. New population estimates are typically available in the summer or fall of the following calendar year. At the time of writing this document, the NH OEP 2013 population estimates are the best available information.

Comprehensive Economic Development Strategy 2015

The 2013 estimates are provided in Table A-1 of the Appendix. These figures are an estimate for July 2013. According to the estimates, the REDC region was home to over 455,700 persons in 2013, and experienced an estimated net growth of 1,711 individuals between 2012 and 2013. There was no substantial population growth in any of the subregions, with an annual growth rate at or near zero percent. This mirrored the data for the state of NH as well.

As mentioned earlier, the largest concentration of persons lives within the Western subregion of the REDC territory. In 2013, 57% of REDC residents were located within the Western subregion (257,293 persons). The Eastern and Central subregions split the remaining population, with 100,328 persons (22%) in the Eastern subregion and 97,473 (21%) in the Central subregion.

The relatively flat rate of annual population growth and future population predictions were discussed at length in the 2013 CEDS Update. As reported, population growth has been slowing since 2000 in the REDC region as well as throughout New Hampshire and New England. Slowing growth is partly due to the lack of job growth that occurred during the Great Recession. In addition, tighter land use restrictions by towns have also slowed growth by discouraging housing development.

Population Projections

The NHOEP is responsible for preparing population projections for the state. These projections were previously released in 2003 (for 2005-2025) and 2007 (for 2010-2030) and are updated approximately every five years. The most recent projections were prepared in the fall of 2013. The current projections have been adjusted to account for recent county and state level growth since the 2010 Census results were published.

The OEP projections are processed by a standard demographic, cohort-component method. This technique breaks the population into 36 age/gender cohorts. Each cohort has its own survival rate and migration rate. Fertility rates are also applied on an age-specific basis. OEP's projections are made on the county level,

and the state totals are generated from the sum of the 10 counties. Municipal level projections are direct products of the projections developed at the state and county levels. Population totals for each lower geography must agree with the appropriate higher geography. For more information on the municipal projections, please see the report on OEP's website.

Town-by-town, county, regional, and state-wide projections are provided in Table A-2 in the Appendix. As illustrated in the following figure, the 2013 projections show a decline in expected growth rate for the region when compared to the projections from both 2003 and 2007. This is in line with continuing downward trends in the growth rate of New Hampshire. The current projections indicate an annual growth rate of only 0.3% for the CEDS region between 2010 and 2040. Previously, the 2003 projections indicated an average annual growth rate from 2005 and 2025 at 1%, and the 2007 projections calculated the annual growth rate at 0.7% between 2010 and 2030. When breaking down the growth rates by decades, the current projections show a slightly declining rate over the projection period, with growth at 0.3% per year from 2010 to 2020, 0.4% from 2020 to 2030, but only 0.1% from 2030 to 2040. In fact, the projections indicate that the region will have a net loss in population from 2035 to 2040. With growth rates slowing to less than 1% per year, the region is predicted to only grow about 35,300 people or about 8% between 2010 and 2040.

Population History & Projections for CEDS Region

Legend:
Population (U.S. Census)
OEP Projections (2003)
OEP Projections (2007)
OEP Projections (2013)

Source: NH OEP

Background Conditions

A word of caution is in order regarding the town-by-town projections: first, these numbers are heavily influenced by past growth history which is not necessarily a reliable indicator of future growth; second, the projections are based on communities' past "share" of their county's population growth, which will not be a reliable predictor of future growth in all cases. This is especially true for communities that are approaching "buildout" under existing zoning or where growth policies or other factors have changed in response to rapid growth.

Current projections show that New Hampshire and the CEDS region will experience a significant slowdown in growth over the next 30 years, and at a rate well below the national average. As shown in the table below, the population of the region between 2010 and 2040 is projected to increase under 8%, which is less than both the nation and the State.

Gender and Age

Table A-3 in the Appendix shows both gender and age distributions for Rockingham and Hillsborough counties and each municipality of the CEDS region as published in the 2010 Census. The region is closely balanced in gender, with slightly more women than men (50.6% women), which was the same as what was found in 2000. The distribution of gender reflects that at the county and state-levels.

Age distribution, as found in the 2010 Census, shows that the average age of the regional population is the same as that of the state as a whole (41.1 years and 41.4 years, respectively). However, upon further examination at the subregional level, we see that both the Eastern and Central subregions have an average age greater than that of New Hampshire (43.6 years and 42.1 years, respectively). Whereas the more

	2010 Population	2040 Projection	Absolute Change	% Change	Avg. Annual Growth Rate
United States	308,745,538	380,219,000	71,473,462	23%	0.8%
New Hampshire	1,316,470	1,427,098	110,628	8.4%	0.3%
CEDS Region	452,846	488,146	35,300	7.8%	0.3%

Source: U.S. Census and NH Office of Energy and Planning

USDA Rural Housing Service

The U.S. Department of Agriculture's (USDA) Rural Housing Service offers a variety of programs to build or improve housing and essential community facilities in rural areas. Programs include:

• Single-Family Housing Programs – provides direct loans or loan guarantees to help low and moderate income residents in rural areas to purchase safe, affordable housing, and offers loans and grants for home repair.

• Multi-Family Housing Programs – offers loans for affordable rental housing for very low, low, and moderate income residents, the elderly, and persons with disabilities. Funds may also be used to buy and improve land to provide necessary facilities, such as water and waste disposal systems. This program also offers rental assistance to help eligible rural residents with monthly rental costs.

• Community Facilities Programs – provides loans, grants, and loan guarantees for essential community facilities in rural areas. Priority is given to health care, education, and public safety projects.

Precent of Total Population

Age Distribution

Legend: CEDS Region, New Hampshire, United States

Source: U.S. Census Bureau

Age
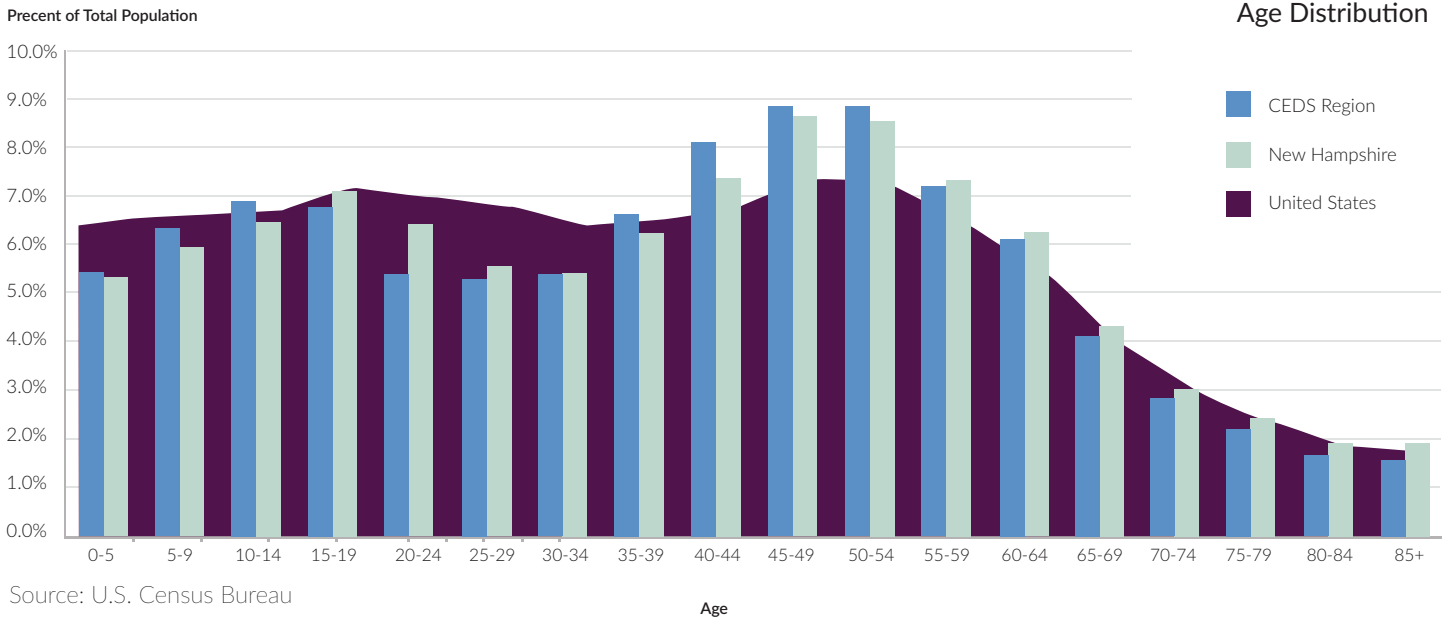
populous Western subregion has a lower median age (39.8 years) due to the larger concentration of younger people in the greater Nashua area, bringing the whole region to an average age similar to that of the state. Those communities directly on the seacoast have the highest median ages of the region.

When comparing the region's age distribution to that of the state (graph, above), we see that children under the age of 15 years makes up a higher percentage of the region's demographics than that of the state. But in that crucial up-and-coming young professional cohort of 20-34 years, the region's percentage of total population falls below the rate of the state. Yet overall, the region and the state have similar age distribution profiles. It's not until we compare both the region and state to that of the federal age profile that we see a large difference in age distribution. The United States on a whole is much younger, with larger percentages of the population under the age of 35. The federal profile shows a more even distribution of ages under the age of 55, whereas New Hampshire and the region have higher peaks and lower valleys in the same age groups.

Race and Ethnic Origin

Like all of New Hampshire, the REDC CEDS region is predominantly white. According to the 2010 census, just over 98% of the region's population reported as belonging to one race, and of those people, 95% reported their race as white. Overall, 93% of the region's citizens reported their race as white, while

that number edges up to 94% for the state. The largest single ethnic population in the region and state is the Asian community, with 2.7% of the population in the region and 2.2% in the state reporting as Asian. The Western subregion is slightly more diverse than the region and state, with 91% of the population reporting their race as white. Refer to Table A-4 in the Appendix for additional details.

Housing Supply

In previous years, REDC used housing estimates provided by NH Office of Energy and Planning (OEP) to monitor changes in housing supply for our region. Unfortunately, due to staffing reductions in 2011, NH OEP discontinued reporting annual housing estimates. Therefore, REDC now uses the American Community Survey (ACS) 5-year data to report on housing stock estimates. Table B-1 of the Appendix lists housing estimates for 2011, 2012, and 2013 (the most recent year available). Because they utilize two different methodologies for estimating the housing stock, the ACS and OEP data cannot be used for historical comparison.

In 2013, there were 190,652 total housing units within the REDC region, with over 50%, or 103,110 of those units within the Western subregion. This correlates to the population data, discussed earlier in the CEDS. The

Background Conditions

Total Housing Units in REDC Region 190,843

Eastern — 49,137 (26% of REDC Region)

Central — 38,405 (20% of REDC Region)

Western — 103,110 (54% of REDC Region)
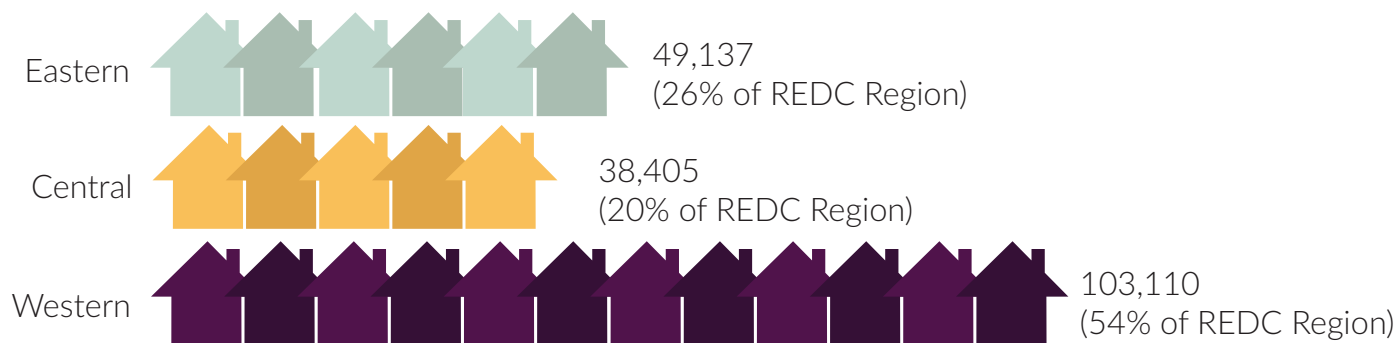
Vacant Units in REDC Region 14,058

Western — 5,289 — 5% Vacancy Rate

Central — 2,863 — 7% Vacancy Rate

Eastern — 5,906 — 12% Vacancy Rate

Source: U.S. Census Bureau / A.C.S

Eastern subregion follows with 49,137 units (26%) and finally the Central subregion with 38,405 units (20%). Once again, the most current data demonstrates a higher than average percent of vacancies in the Eastern subregion when compared to the region. Although the total number of vacant units decreased between 2012 and 2013, down 152 units, the total number of housing units also decreased (by 340 units or 0.7%), therefore the vacancy rate remained in the double-digits for the Eastern subregion. Although the Eastern subregion only has 26% of the housing stock, it has 42% of the vacant units within the region. It is possible that the elevated rate of vacancies in the Eastern subregion is due to the seasonal nature of the seacoast. Coastal communities such as Hampton, Rye, and Seabrook have higher vacancy rates than the surrounding communities. These communities experience high volumes of summer rentals and seasonal residencies, possibly contributing to a higher than average vacancy rate. However, the entire REDC region fares better than the state, which had a vacancy rate of 16% in 2013.

Housing Sales and Purchase Prices

NH Housing Finance Authority (NHHFA) compiles a housing purchase price database annually for new and used home, condominium, and non-condominium sales. In years past, REDC typically reported on the sales and purchase prices from the full-year ending prior to the

release of the CEDS. Unfortunately, the vendor that supplies the raw data to NHHFA was unable to supply the year-end data to NHHFA prior to the release of this report. Additionally, much of the data on a town-by-town basis is not available. At the time of writing the 2015 CEDS, the only data available for our analysis is the January through September 2014 sales data on the state- and county-wide level. Therefore, this year's update on housing sales and purchase price trends is extremely limited, and there are no summarized results from 2014 in the Appendix.

Based on the first three quarters of home sales across the state for 2014, the average sale price of a home (new and existing, all sizes) increased slightly when compared to 2013 values. If the trend holds up for the fourth quarter, 2014 will be the second straight year that home prices increased in the state. The average sales price for a home was $225,000 (January – September) in NH, which is up 2% from the previous year. While prices remain about 10-30% less than the market highs circa 2007, the data indicates that prices are up on the state level about 7% over the past five years.

Using the data available, it appears that most of the counties within the state are experiencing a positive increase in the average sale price of homes. Only

Cheshire, Grafton, and Sullivan counties report declining prices from 2013 to 2014, and these three counties also have experienced a decrease in average prices over the past five years (2009 to 2014, first three quarters). In the first three quarters of 2014, the highest median sales price for all homes was once again in Rockingham County, with an average cost of $277,500. This is up $8,500, or 3%, from the year-end 2013 data. Once again, the second highest median sales price was in Hillsborough County at $225,000. Both counties in the REDC region were the only two at or above the state median sales price of $225,000. Overall, sale prices are up on average 3% in Hillsborough County and 12% in Rockingham County over the five-year period from 2009 to 2014, with a statewide increase of 7% during that same time period.

A house that sold in 2014 in Rockingham County, which utilized the USDA Rural Development Program.

Housing Purchase Prices for New Hampshire Counties

	2007	2008	2009	2010	2011	2012	2013	2014*
Belknap County	$219,000	$215,000	$170,000	$175,000	$170,000	$170,000	$172,400	$184,000
Carroll County	$219,900	$210,000	$170,000	$180,000	$173,000	$169,000	$180,000	$195,000
Cheshire County	$205,000	$192,500	$169,900	$166,000	$159,000	$164,500	$164,000	$158,000
Coos County	$127,533	$115,000	$80,000	$95,000	$90,000	$98,000	$88,600	$100,000
Grafton County	$221,000	$212,500	$182,000	$185,000	$189,425	$185,000	$190,000	$155,000
Hillsborough County	$265,000	$244,900	$218,500	$224,900	$210,533	$209,900	$225,000	$225,000
Merrimack County	$238,000	$232,000	$199,900	$195,000	$182,000	$185,000	$202,500	$211,000
Rockingham County	$300,000	$285,000	$247,000	$259,000	$250,000	$255,000	$269,000	$277,500
Strafford County	$235,000	$225,500	$194,933	$195,000	$186,000	$187,900	$200,000	$213,000
Sullivan County	$190,000	$185,000	$149,000	$153,000	$149,900	$158,500	$148,000	$130,000
New Hampshire	$252,500	$240,000	$210,000	$215,000	$207,000	$205,000	$220,000	$225,000

Data Source: NH Housing Finance Authority
* 2014 prices include January - September 2014 data only.

Housing Rental Prices

The NHHFA also collects data on the average monthly price of a rental unit. In 2014, the highest average monthly rental price was in the Eastern subregion at $1,338 per month. Of the eight communities reporting data in this subregion, the lowest average rental was in Seabrook at $1,118/month and the highest was in Stratham at $1,816/month.

Monthly costs were not as high in the other two subregions. The Central subregion rates ranged from $760/month to $1,163/month, while the Western subregion prices ranged from $947/month to $2,418/month. Of note, Merrimack, in the Western subregion, reported near doubling of rental rates from 2013 to 2014, going from

Background Conditions

$1,217 to $2,418/month. Unsure of the reasons for this increase, the data point could be an outlier. The table below summarizes the average monthly rental prices for our region and the state of New Hampshire. Note that the subregion averages are calculated as an average based on only those communities reporting data within the subregion.

Average Monthly Rental Prices for CEDS Region and the State of New Hampshire

Town/Area	2012	2013	2014
CEDS Eastern Communities Average	$1,357	$1,337	$1,338
CEDS Central Communities Average	$914	$980	$995
CEDS Western Communities Average	$1,072	$1,091	$1,242
REDC CEDS Region Average	$1,064	$1,089	$1,153
Hillsborough County Average	$1,067	$1,054	$1,073
Rockingham County Average	$1,070	$1,099	$1,123
State of NH Average	$1,005	$1,018	$1,037

The subregion averages are based on the average monthly rental rates for those towns reporting rates.

A comparison of rental rates from year to year for the REDC region and subregions cannot be made due to the fact that the towns reporting rates are not the same from year to year.

Data Source: NHHFA, rental prices are average as reported by each community for all rental units, regardless of size.

Deed Foreclosures

Real Data Corporation publishes summaries of New Hampshire real estate sales and other public records. This includes foreclosure data for both Hillsborough and Rockingham counties and the state of New Hampshire. The table below summarizes the annual number of foreclosed deeds in the three subregions of the REDC region, as well as county- and state-wide information. In addition, Table B-7 in the Appendix lists the foreclosure data on a town-by-town format.

After an increase in the number of foreclosures in 2012 from 2011, the table demonstrates that for the second straight year, there was a decrease in the number of foreclosures. From 2013 to 2014, the number of foreclosures was down 35% in the REDC region, and remains well under the peak witnessed in 2010. Generally, the 2014 numbers are roughly 50% less than those from 2010, indicating that the mortgage crisis of the late 2000s appears to be behind us.

Deed Foreclosures in the REDC Region and State

Town/Area	2010	2011	2012	2013	2014	1 year change 2013 - 2014	% change 2013 - 2014
Eastern Communities	181	152	148	102	82	-20	-20%
Central Communities	343	273	286	210	179	-31	-15%
Western Communities	715	556	637	550	302	-248	-45%
REDC CEDS Region	1239	981	1071	862	563	-299	-35%
Hillsborough County	1172	933	1078	766	500	-266	-35%
Rockingham County	820	680	710	507	392	-115	-23%
New Hampshire	3953	3146	3768	2796	2074	-722	-26%

Source: Real Data Corp, Compiled by New Hampshire Housing Finance Authority

Employment and Wages

Hillsborough and Rockingham counties continue to be the hub of employment for the state of New Hampshire, although growth has nearly halted. During 2013, the two counties combined reported 21,092 establishments, which was only 19 new establishments added from 2012, accounting for a near zero percent increase (less than 0.1%). However, that base of employment still holds at 47% of the state total, which also experienced a less than 0.1% increase in establishments. Additionally, the two counties had an average annual employment of 328,073 jobs, up 1.3% from 2012, which is 53% of the state total. A summary of employment units (establishments), average employment, and average weekly wages by industry classification for Hillsborough and Rockingham counties, as well as the state of NH, is found in Table C-2 of the Appendix. This table has been updated with data from 2013, the latest available from the Labor Market Information Bureau of the NH Department of Employment Security (as of May 2015).

In 2013, for both Rockingham and Hillsborough counties, the Retail Trade industry (North American Industry Classification System [NAICS] Codes 44-45) supported the largest number of jobs. In Rockingham, retail supported 19% of all employment, followed by

Health Care and Social Assistance (NAICS 62), which supplied 11% of employment. Government jobs rounded out the top three employment sectors with 10% of the available employment in 2013. Meanwhile in Hillsborough County, Retail supported nearly 15% of all employment during 2013, followed by Health Care at 14% and Manufacturing (NAICS 31-33) at just under 13%. (Please note that these figures represent employers located within the region and not employees who reside within the region.)

Table C-3: Employers, Employment & Wages by Town in the Appendix looks at similar data for establishments, employment, and wages but at a town level rather than by industry class, for the most current two years of data. A summary of that information for the region, counties, and state over the five years since the last CEDS is provided the table, below. Looking at the annual changes from 2012 to 2013, employers, employment, and wages generally increased. While annual growth slowed down from previous years, the REDC region gained an additional 2,880 jobs and 39 establishments from 2012 to 2013. The Western subregion continues to hold the largest base of employment due to size of the Nashua regional area. Additionally, it has the highest average weekly wage of the three subregions.

Town/Area	2008			2012			2013		
	Establish-ments	Avg. Annl. Employ-ment	Average Weekly Wage	Establish-ments	Avg. Annl. Employ-ment	Average Weekly Wage	Establish-ments	Avg. Annl. Employ-ment	Average Weekly Wage
Eastern Communities	4,557	66,701	$813	4,659	67,455	$880	4,677	68,405	$864
Central Communities	2,161	22,882	$692	2,136	22,683	$715	2,118	23,050	$716
Western Communities	7,578	127,205	$903	7,450	124,332	$962	7,489	125,895	$966
REDC CEDS region	14,296	216,788	$782	14,245	214,470	$831	14,284	217,350	$826
Hillsborough County	11,396	194,059	$976	11,245	188,425	$1,030	11,257	190,568	$1,039
Rockingham County	10,099	137,191	$839	9,828	135,396	$907	9,835	137,505	$919
New Hampshire	45,052	628,819	$864	44,804	612,432	$928	45,183	618,756	$942

Source: NH Department of Employment Security, Economic & Labor Market Information Bureau
Note: These figures represent employers located within the region and not employees who reside within the region.

Background Conditions

Looking at the same information over a five-year time frame, employment remained relatively flat or even down since 2008, while wages continued to increase. The greatest growth over those five years was in the Eastern subregion, which saw a 2.6% increase in the number of establishments and jobs. Additionally, the REDC region had an average weekly rate that not only remained less than that of the state over the past five years, but also grew at a rate less than the state during those same five years (5.7% increase and 9.1% increase, respectively).

As demonstrated in the chart below, the large majority of jobs within the REDC region are within the Western subregion (58%), followed by 31% in the Eastern subregion and 11% within the Central subregion. The distribution of jobs within the region has not changed in the five years since the last CEDS. Altogether, the 42 communities of the region contain 35% of all jobs within New Hampshire. Again, this has remained relatively the same since the previous five-year CEDS.

Tables C-3 and C-5 in the Appendix include weekly wage information in addition to the employer and employment data already discussed. The Appendix

tables show changes in numbers of employers, employees and average wages from 2012 and 2013. Although we present the data town-by-town and summarized by CEDS subregion, it should be noted that some data is suppressed in smaller communities or where a single employer makes up more than 80 percent of the collected data. This means that the subregional totals do not always add to the regional totals. In addition, the wage information for the subregions and the region is an average of the individual town data.

The chart on page 17 outlines the average weekly wages for the region and state for the most recent from 2008 to 2013. After experiencing a dip in weekly wages during 2009, wages in the REDC region increased at roughly a 3% average annual growth rate until 2012. However in 2013, wages for the region dropped, most significantly due to a nearly 2% decrease in the average weekly rate of the Eastern subregion. The 2013 average weekly rate for the REDC region was $826 (down $5/week from 2012). In contrast, average weekly wages were up for the state as well as Hillsborough and Rockingham counties. The state's rate at $942/week, increased at a rate of 1.5% from 2012 to 2013.

Distribution of Jobs Within the REDC Region, 2013

31%
11%
58%

■ CEDS Eastern Communities
□ CEDS Central Communities
□ CEDS Western Communities
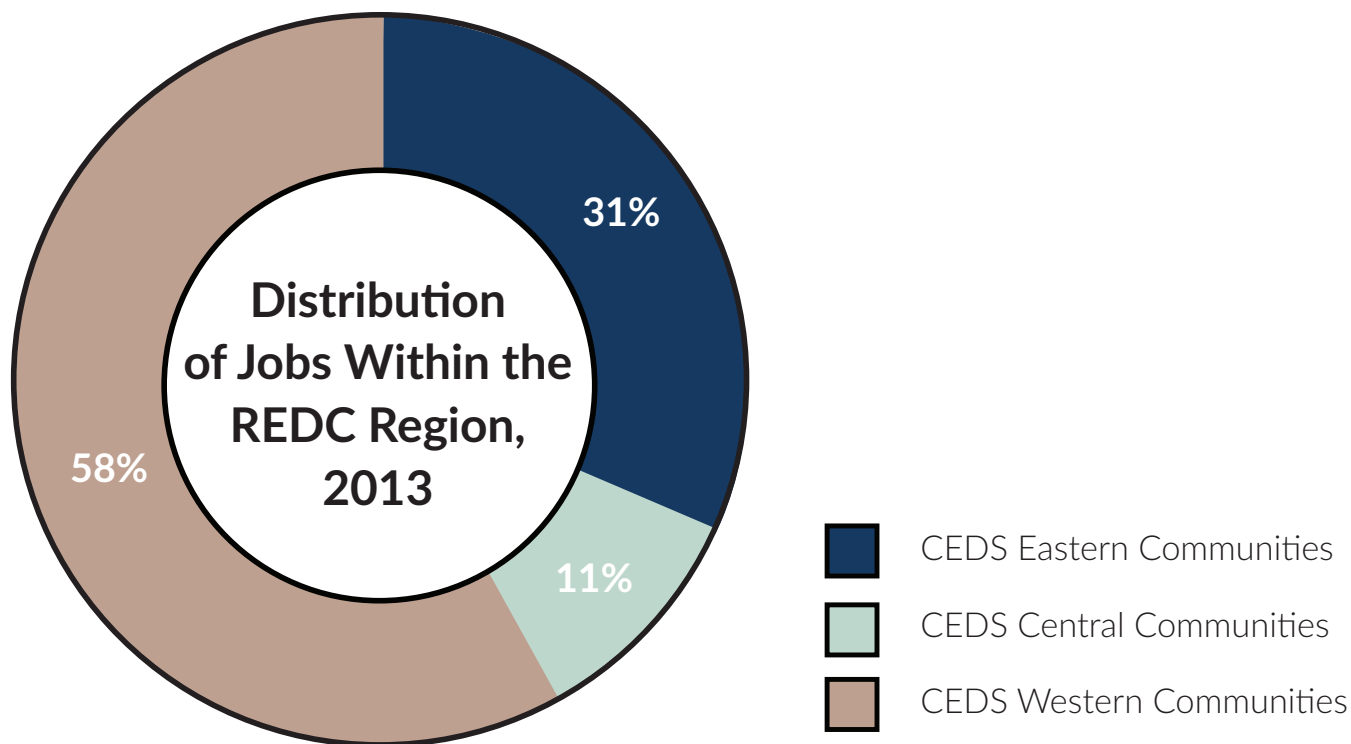
Source: NH Dept. of Employment Security, Economic & Labor Market Information Bureau

Average Weekly Wages Between 2008 and 2013
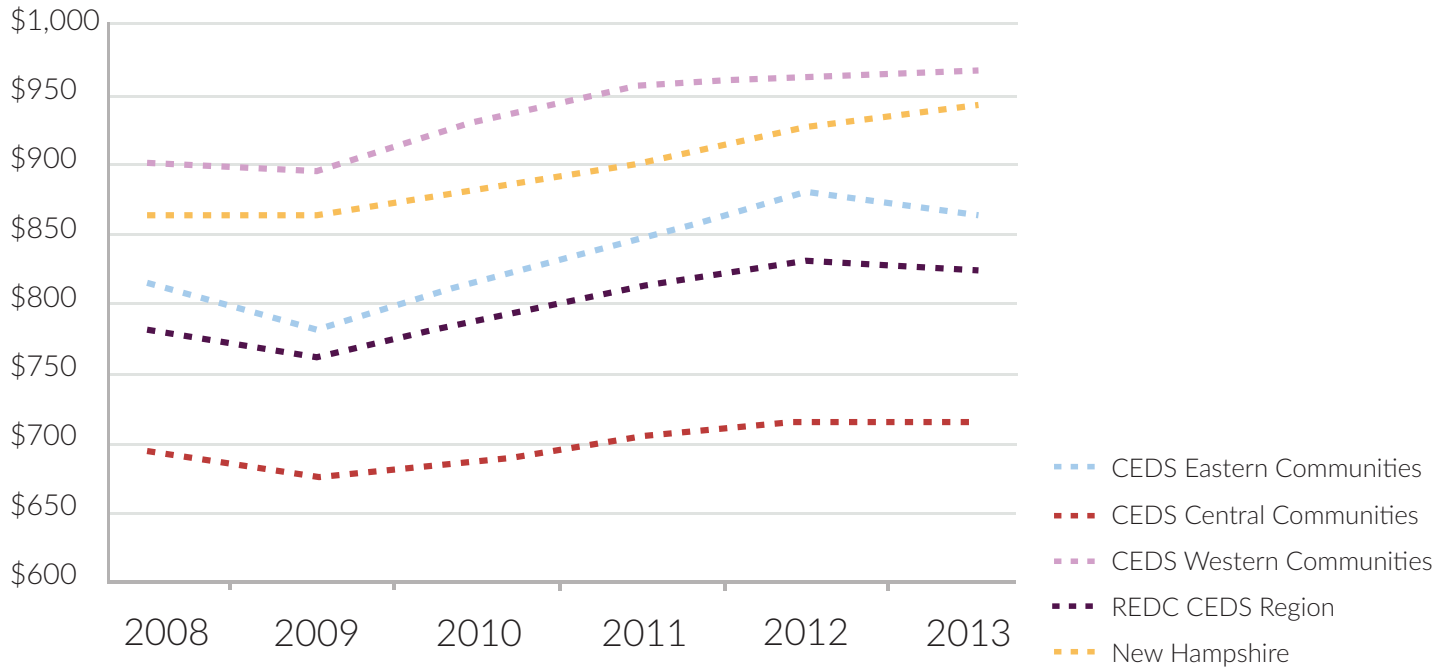
Legend:
- CEDS Eastern Communities
- CEDS Central Communities
- CEDS Western Communities
- REDC CEDS Region
- New Hampshire

Source: NH Department of Employment Security, Economic & Labor Market Information Bureau
*NOTE: Weekly wages are based on all reporting jobs from both private and government sectors.

Within the REDC region, the highest average wage rate was in the town of Merrimack at $1,577/week, followed closely by North Hampton at $1,340/week. Both of these towns experienced decreases in weekly wages from 2012 to 2013. The lowest average weekly wage was found in the town of Deerfield, with an average wage of $566/week, followed by Sandown with a weekly wage averaging $580 per week.

Employment Projections

The NH Employment Security Economic & Labor Market Information Bureau provides employment projections for both industry and occupation. The latest projections are based on estimated data for 2012 and project out 10 years to 2022 for the state. County level projections are based on 2010 data and project out to 2020.

Over the ten-year period from 2012 to 2022, total employment in New Hampshire is expected to grow by 10.3%, with the estimated number of jobs from 668,268 to 736,999. In comparison, projected growth for the U.S. for the same period is 10.8%.

The chart on page 18 shows how each industry sector is expected to grow from 2012 to 2022 for the state. Of note, each sector is expected to increase in number of jobs, with the exception of Manufacturing (down 1.4%) and Utilities (down 6.0%). The strongest growing sectors are Administrative Support and Waste Management Services, Health Care and Social Assistance, and Professional, Scientific, and Technical Services. The Health Care and Social Assistance sector will add roughly 20,325 new jobs in by 2022, making it the single largest increase in employment, holding 105,659 of the state's projected total of 736,999 jobs in 2022.

Rockingham County

Industry Classification	2010 # Jobs Estimated	2020 # Jobs Projected	Change	Percent Change	2010 % of Total Employment	2020 % of Total Employment
Total Employment (county-wide)	145,401	161,327	15,926	11.0%	n/a	n/a
Agriculture, Forestry, Fishing, and Hunting	828	875	47	5.7%	0.6%	0.5%
Mining	103	107	4	3.9%	0.1%	0.1%
Construction	5,221	6,895	1,674	32.1%	3.6%	4.3%
Manufacturing	13,124	13,421	297	2.3%	9.0%	8.3%
Utilities	1,076	1,021	-55	-5.1%	0.7%	0.6%
Wholesale Trade	6,114	6,756	642	10.5%	4.2%	4.2%
Retail Trade	24,666	26,589	1,923	7.8%	17.0%	16.5%
Transportation and Warehousing	4,634	5,063	429	9.3%	3.2%	3.1%
Information	2,580	2,764	184	7.1%	1.8%	1.7%
Finance and Insurance	5,083	5,328	245	4.8%	3.5%	3.3%
Real Estate and Rental and Leasing	1,696	1,941	245	14.4%	1.2%	1.2%
Professional, Scientific, and Technical Services	6,980	8,581	1,601	22.9%	4.8%	5.3%
Management of Companies and Enterprises	2,038	2,153	115	5.6%	1.4%	1.3%
Administrative and Waste Management Services	8,146	9,895	1,749	21.5%	5.6%	6.1%
Educational Services	11,242	11,981	739	6.6%	7.7%	7.4%
Health Care and Social Assistance	14,488	18,247	3,759	25.9%	10.0%	11.3%
Arts, Entertainment, and Recreation	2,936	3,360	424	14.4%	2.0%	2.1%
Accommodation and Food Services	12,398	13,390	992	8.0%	8.5%	8.3%
Other Services (except government)	4,863	5,182	319	6.6%	3.3%	3.2%
Government	5,908	6,145	237	4.0%	4.1%	3.8%
Self-employed and Unpaid Family Workers	11,277	11,633	356	3.2%	7.8%	7.2%

Source: NH Employment Security Economic & Labor Market Information Bureau

Percent Change in Projected Employment by Sector, in New Hampshire 2012 -2022

Sector	Percent Change
Admin and Support and Waste Management Services	23.9%
Health Care and Social Assistance	23.8%
Professional, Scientific, and Technical Services	22.6%
Construction	17.7%
Wholesale Trade	11.8%
Real Estate and Rental and Leasing	11.4%
Arts, Entertainment, and Recreation	11.2%
Financial and Insurance	10.9%
Accommodation and Food Services	10.4%
Other Services (except government)	9.1%
Educational Services	7.0%
Agriculture, Forestry, Fishing, and Hunting	6.9%
Retail Trade	6.1%
Government	4.5%
Self-employed and Unpaid Family Workers	4.7%
Mining	4.2%
Information	3.9%
Management of Companies and Enterprises	3.7%
Transportation and Warehousing	2.8%
Manufacturing	-1.4%
Utilities	-6.0%

Legend:
- Service-providing industries
- Goods-producing industries
- Self-employed and UFW

Average, all sectors = 10.3%

Source: NH Employment Security Economic & Labor Market Information Bureau

Hillsborough County

Industry Classification	2010 # Jobs Estimated	2020 # Jobs Projected	Change	Percent Change	2010 % of Total Employment	2020 % of Total Employment
Total Employment (county-wide)	202,087	227,418	25,331	12.5%	n/a	n/a
Agriculture, Forestry, Fishing and Hunting	413	447	34	8.2%	0.2%	0.2%
Mining	32	32	-	0.0%	0.0%	0.0%
Construction	5,843	7,469	1,626	27.8%	2.9%	3.3%
Manufacturing	26,090	26,061	-29	-0.1%	12.9%	11.5%
Utilities	379	354	-25	-6.6%	0.2%	0.2%
Wholesale Trade	7,299	8,462	1,163	15.9%	3.6%	3.7%
Retail Trade	26,299	28,753	2,454	9.3%	13.0%	12.6%
Transportation and Warehousing	5,337	5,662	325	6.1%	2.6%	2.5%
Information	5,179	5,752	573	11.1%	2.6%	2.5%
Finance and Insurance	9,564	11,003	1,439	15.0%	4.7%	4.8%
Real Estate and Rental and Leasing	2,307	2,612	305	13.2%	1.1%	1.1%
Professional, Scientific, and Technical Services	11,421	14,505	3,084	27.0%	5.7%	6.4%
Management of Companies and Enterprises	2,950	3,188	238	8.1%	1.5%	1.4%
Administrative and Waste Management Services	8,721	10,542	1,821	20.9%	4.3%	4.6%
Educational Services	15,781	17,045	1,264	8.0%	7.8%	7.5%
Health Care and Social Assistance	26,275	33,650	7,375	28.1%	13.0%	14.8%
Arts, Entertainment, and Recreation	2,419	2,787	368	15.2%	1.2%	1.2%
Accommodation and Food Services	13,863	14,982	1,119	8.1%	6.9%	6.6%
Other Services (except government)	7,740	8,622	882	11.4%	3.8%	3.8%
Government	9,292	9,532	240	2.6%	4.6%	4.2%
Self-employed and Unpaid Family Workers	14,883	15,958	1,075	7.2%	7.4%	7.0%

Source: NH Employment Security Economic & Labor Market Information Bureau

The two tables, shown above and on page 18 show expected job growth by industry for the 10 years between 2010 and 2020 on the county level. While generally the 10-year trends are similar to that projected for the state, there are a few notable differences. In Hillsborough County, the growing sectors are Health Care and Social Assistance, Construction, and Professional, Scientific, and Technical Services, with the largest total increase in jobs coming from the Health Care and Social Assistance sector. The county on a whole is predicted to add 25,331 jobs, for an increase of 12.5%. Similar to the state, the only declining sectors are Manufacturing and Utilities.

Meanwhile in Rockingham County, the strongest projected increase from 2010 to 2020 will be in the Construction sector, followed by Health Care and Social Assistance and Professional, Scientific, and Technical Services, with the largest total increase in jobs coming from the Health Care and Social Assistance sector. The only declining sector is projected to be in the Utilities sector, with Manufacturing actually adding 297 jobs, for a 2.3% increase. Rockingham County is predicted to add 15,926 jobs, for an increase of 11.0% between 2010 and 2020.

Unemployment Rates and Trends

Table C-4 in the Appendix includes town-by-town annual unemployment data from 2004 through 2014. Over this 10-year period, rates were generally at the lowest from 2006 to 2007 and highest during 2009 to 2010. The state and country are coming off of the worst recession in over 70 years, and the unemployment rates are slow to recover, but overall

the annual unemployment rates within the REDC region and the state are at their lowest post-recession levels. Within the REDC region, the lowest unemployment rate was in the Eastern subregion (4.1%) and highest in the Western subregion (5.0%). And as it has been for the previous few years, the State of New Hampshire has an annual unemployment rate lower than both Hillsborough and Rockingham Counties. The lowest annual rate of unemployment for 2014 was in New Castle (3.2%) and the highest was in Plaistow (6.5%). Results are summarized in the table, below. Note that the regional and subregional data is an average of the individual communities and not an average based on population, therefore it is not a true weighted-average.

In addition to reviewing unemployment data on a town-by-town basis, the CEDS also reviews information based on the various NECTA through its region. The U.S. Office of Management and Budget (OMB) uses the term NECTA, New England City and Town Area, which is a geographic and statistical entity for use in describing aspects of the New England region of the United States. As described in the Regional Geography section of the CEDS (page 4), the OMB changed the composition of the NECTAs in 2014. Unfortunately, this means that a direct year-to-year comparison is not always possible. With respect to the REDC region, the only two NECTAs that did not change in composition are the Pelham Town, Lowell-Billerica-Chelmsford MA-NH NECTA Division, Salem Town, NH Portion, and the Lawrence-Methuen-Salem MA-NH NECTA. Additionally, the Manchester NH NECTA, Nashua NH-MA NECTA, NH Portion, and Portsmouth NH-ME Metro NECTA remain part of the REDC region, with minor composition changes.

Rockingham Annual Unemployment Rates for the REDC Subregions, Counties, and State

Area	Annual 2004*	Annual 2005*	Annual 2006*	Annual 2007*	Annual 2008*	Annual 2009*	Annual 2010*	Annual 2011*	Annual 2012*	Annual 2013*	Annual 2014*
Eastern Communities	3.8%	3.6%	3.5%	3.4%	3.8%	5.8%	5.4%	4.8%	5.2%	5.2%	4.1%
Central Communities	4.6%	4.2%	3.9%	3.9%	4.5%	6.8%	6.5%	5.8%	6.3%	5.7%	4.6%
Western Communities	4.7%	4.2%	3.9%	3.9%	4.2%	6.7%	6.6%	5.9%	6.1%	5.9%	5.0%
REDC CEDS Region	**4.3%**	**3.9%**	**3.7%**	**3.7%**	**4.2%**	**6.4%**	**6.1%**	**5.5%**	**5.9%**	**5.6%**	**4.5%**
Hillsborough County	4.0%	3.7%	3.7%	3.6%	3.9%	5.6%	6.3%	5.5%	5.7%	5.4%	4.5%
Rockingham County	4.7%	4.2%	3.9%	3.9%	4.3%	6.6%	6.3%	5.7%	6.0%	5.7%	4.7%
New Hampshire	3.9%	3.6%	3.5%	3.5%	3.9%	6.2%	6.1%	5.4%	5.5%	5.3%	4.3%

Source: NH Department of Employee Security - Economic & Labor Market Information Bureau
*Rates not seasonally adjusted.

As highlighted in the table on page 21, all of the regional NECTAs show a decrease in annual unemployment during 2014, both over the course of one year (from 2013) and from five years ago (2009). For the first time in five years, the hardest hit NECTA in the REDC region is no longer the Salem, NH area, but rather the Pelham, NH area. Yet even at a rate of 6.0% annual unemployment in 2014, the Pelham, NH NECTA was still less than the national annual unemployment rate of 6.2%. The Portsmouth NH-ME Metro NECTA, NH Portion remained the strongest subarea with an annual unemployment rate of only 4.0% for 2014.

Average Annual Unemployment Rates for the Region

	2008	2009	2010	2011	2012	2013	2014	5 year change from 2009-2014	1 year change from 2013-2014
Rochester-Dover NH-ME MetroNECTA (no longer within the REDC region)	3.7%	6.2%	5.9%	5.3%	5.5%	5.1%		n/a	n/a
Manchester NH NECTA (change in composition in 2014)	3.9%	6.3%	6.2%	5.3%	5.5%	5.1%	4.2%	-2.1%	-0.9%
Nashua NH-MA NECTA, NH Portion (change in composition in 2014)	3.9%	6.4%	6.3%	5.6%	5.7%	5.5%	4.7%	-1.7%	-0.8%
Exeter Area, NH Portion, Haver-hill-North Andover-Amesbury (changed to the Seabrook-Hampstead Area in 2014)	5.1%	7.4%	6.9%	6.3%	6.7%	6.3%		n/a	n/a
Portsmouth NH-ME Metro NECTA, NH Portion (change in composition in 2014)	3.5%	5.4%	5.1%	4.7%	4.8%	4.7%	4.0%	-1.4%	-0.7%
Pelham Town, Lowell-Billerica-Chelms-ford MA-NH NECTA Division	5.2%	8.2%	7.8%	7.1%	7.3%	7.2%	6.0%	-2.2%	-1.2%
Salem Town, NH Portion, Law-rence-Methuen-Salem MA-NH NECTA	5.4%	8.0%	8.2%	7.3%	8.1%	7.6%	5.4%	-2.6%	-2.2%
Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division							5.3%	n/a	n/a
Raymond NH LMA (new in 2014)							4.2%	n/a	n/a
Hillsborough County	3.9%	6.5%	6.3%	5.5%	5.7%	5.4%	4.5%	-2.0%	-0.9%
Rockingham County	4.3%	6.6%	6.3%	5.7%	6.0%	5.7%	4.7%	-1.9%	-1.0%
New Hampshire	3.9%	6.2%	6.1%	5.4%	5.5%	5.3%	4.3%	-1.9%	-1.0%
New England	5.4%	8.1%	8.5%	7.7%	7.2%	7.1%	5.9%	-2.2%	-1.2%
United States	5.8%	9.3%	9.6%	8.9%	8.1%	7.4%	6.2%	-3.1%	-1.2%

Source: U.S. Department of Labor, Bureau of Labor Statistics
NH Economic & Labor Market Information Bureau

Unemployment Trend

New Hampshire had an unemployment rate of 4% at the beginning of 2015, and analysts predict if the state trends downward at the same pace as the nation, our rate could be 3.6% by the end of the first quarter of the year. Analysts are noting a strong increase, 15%, in business service jobs. According to data from the U.S. Bureau of Labor Statistics and the NH Department of Employment Security, the health care and information technology sectors have the state's lowest unemployment numbers: 2.0% and 2.1% unemployment, respectively. The specific job sector with the lowest unemployment is application development, with just 1.6%.

Background Conditions

Monthly Unemployment Rates for Regional NECTAs

	January 2014	February 2014	March 2014	January 2015	February 2015	March 2015	change Jan-March 2015	change March 2014-2015
Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	6.8%	6.5%	6.4%	5.8%	5.9%	5.4%	-0.4%	-1.0%
Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA Division	6.3%	6.2%	6.0%	5.6%	5.6%	5.1%	-0.5%	-0.9%
Pelham Town, NH Portion, Lowell-Billerica-Chelmsford MA-NH NECTA Division	7.3%	7.3%	6.8%	6.4%	6.2%	5.7%	-0.7%	-1.1%
Manchester NH MetroNECTA	5.0%	5.0%	4.8%	4.3%	4.3%	4.0%	-0.3%	-0.8%
Nashua NH-MA NECTA Division, NH Portion	5.6%	5.5%	5.3%	4.8%	4.8%	4.5%	-0.3%	-0.8%
Portsmouth NH-ME MetroNECTA, NH Portion	4.9%	4.8%	4.5%	4.2%	4.1%	3.8%	-0.4%	-0.7%
Raymond NH LMA	5.5%	5.4%	5.0%	4.5%	4.6%	4.4%	-0.1%	-0.6%
Hillsborough County	5.2%	5.2%	5.0%	4.6%	4.6%	4.3%	-0.3%	-0.7%
Rockingham County	5.7%	5.6%	5.2%	4.9%	4.9%	4.5%	-0.4%	-0.7%
New Hampshire	5.2%	5.2%	4.9%	4.5%	4.5%	4.2%	-0.3%	-0.7%
United States	7.0%	7.0%	6.8%	6.1%	5.8%	5.6%	-0.5%	-1.2%

Source: NH Economic & Labor Market Information Bureau

The trend of declining unemployment rates continued in the first quarter of 2015. The table above outlines the monthly (not seasonally adjusted) unemployment rates for the first three months of 2015. Generally the rates within the REDC region have stayed within a half of a point on average from January to March 2015, but are down roughly one point when compared to the same period one year ago. The Pelham Town NECTA, which has the highest rates within REDC for the first quarter of 2015, also saw the largest decrease in unemployment rates during the same time period, dropping 0.7 points from January to March 2015.

On a regional and national scale, New Hampshire fairs well. From 2013 to 2014, all states within New England, experienced a decrease in annual unemployment, with an average of a 1.2 point decrease. The table to the right demonstrates that New Hampshire is second only to Vermont with the lowest unemployment rate in the New England Region. New Hampshire's jobless rate continued to remain below the national average rate during 2014, at almost 2% less than the U.S. average, and is ranked seventh overall (tied with Wyoming) behind North Dakota

Unemployment Rates for New England States and Country

Region/State	2011 Unempl. Rate (%)	2012 Unempl. Rate (%)	2013 Unempl. Rate (%)	2014 Unempl. Rate (%)	change 2013-2014
New Hampshire	5.4	5.5	5.3	4.3	-1.0
Connecticut	8.8	8.4	7.8	6.6	-1.2
Maine	7.5	7.3	6.7	5.7	-1.0
Massachusetts	7.4	6.7	7.1	5.8	-1.3
Rhode Island	11.3	10.4	9.5	7.7	-1.8
Vermont	5.6	5.0	4.4	4.1	-0.3
New England	7.7	7.2	7.1	5.9	-1.2
United States	8.9	8.1	7.4	6.2	-1.2

Source: NH Employment Security, U.S. Bureau of Labor Statistics.

(2.8%), Nebraska (3.3%), South Dakota (3.4%), Utah (3.8%), and Minnesota and Vermont (4.1%) on the national level.

Recent Closings

The State of New Hampshire Department of Resources and Economic Development (DRED) Office of Workforce Opportunity monitors significant plant and business closings during the year. The state's Rapid Response program works with qualifying employers (must have a group of 25 or more workers being dislocated), and if a company chooses to participate, DRED receives a count of the number of layoffs. The table below summarizes reported closings and/or reductions in workforce in the REDC region that occurred during 2014 and for partial year 2015 (report date of May, 2015). Due to the nature of the reporting requirements, not all job losses are captured through the Rapid Response program; however, the data provides quality data, especially on larger layoff events.

During 2014, the region experienced a reported loss of 450 jobs, which is a decrease of over 1,450 jobs than what was reported during 2013. A stronger regional economy, smaller available labor force, and lower unemployment rates are also indicators that job losses were not as significant during 2014 when compared to recent history. Additionally, REDC reported significant layoffs at the state-wide level in 2013 with the closure of both Shaw's Markets (453 jobs) and Stop & Shop Markets (672 jobs). Therefore, the actual number of jobs lost year-over-year may not be as significant as the numbers appear. The most notable events reported between January 2014 and May 2015 came from Sig Sauer in Newington with 117 jobs lost and L-3 Warrior Systems of Londonderry with 113 reported layoffs.

The hardest hit community during this time period was Londonderry, with reported work force reduction of over 200 jobs. All 518 layoffs reported from January 2014 to May 2015 are in the manufacturing sector.

Reported Workforce Reductions from Layoffs and Plant Closings

Company Name	Location	Industry	Date Reported	Layoff Date	Total Employ-ees	# Employees Terminated	# of Sites	In 2014 CEDS?
L-3 Warrior Systems	Londonderry	manufacturing	04/10/14	04/29/14	761	113	1	Yes
Sig Sauer	Portsmouth	manufacturing	05/15/14	05/15/14		57	1	No
Sig Sauer	Newington	manufacturing	07/08/14	07/10/14	800	117	1	No
Benchmark Electronics	Londonderry	manufacturing	09/16/14	10/10/14	107	92	1	No
Benchmark Electronics	Nashua	manufacturing	10/20/14	11/13/14	480	25	1	No
GT Advanced Technologies	Merrimack	manufacturing	10/24/14	12/22/14		46	1	No
Amphenol	Nashua	manufacturing	03/27/15	04/01/15	290	18	1	No
St. Joseph Home Health Care	Nashua	manufacturing	03/26/15	06/26/15	50	50	1	No

Data Source: New Hampshire DRED Office of Workforce Opportunity

Total # layoffs reported in 2014:   450
Total # layoffs reported in 2015 (as of May 2015):   68
Total # layoffs reported Jan. 2014 - May 2015:   518

An internet-based search for additional layoffs during 2014 produced the following information:

- October 21, 2014 in *NH Business Review*: GT Advanced Technologies' planned to lay off 890 employees nationally, including 47 in Merrimack, New Hampshire, due to bankruptcy proceedings.

- February 17, 2015 in the *Union Leader*: Approximately 100 employees will face a temporary layoff after a roof collapse on a warehouse at Georgia Pacific in Newington, NH. There is no word on when the employees will be back to work.

Background Conditions

Labor Force Trends

Table C-6 in the Appendix tracks civilian labor force data at the county and state level, along with the other New England states, and it is summarized for 2013 and 2014, to the right. As mentioned earlier, from 2013 to 2014, all states within New England and the U.S. experienced a decrease in annual unemployment rates. The changes in the available labor force may have had some impact on the unemployment rates. In all three northern-New England states, the pool of available workers decreased, most notably in Maine, where the available labor force decreased over 5.5% from 2013 to 2014. Fewer available workers can mean fewer unemployed workers. Meanwhile, in Massachusetts, the available workforce increased by 93,000 people, which equates to just under 3% growth. The total number of employed workers increased, suggesting the creation of new jobs.

Income

The ACS collects numerous data regarding income and poverty, and categorizes it by factors such as ethnicity, gender, age, family type, etc. For the purposes of the 2015 CEDS, we narrowed down the scope of data to look solely at the per capita income, since this is the factor that is often used in various reports and distress criteria.

The ACS defines per capita income as: *Per capita income is the mean money income received in the past 12 months computed for every man, woman, and child in a geographic area. It is derived by dividing the total income of all people 15 years old and over in a geographic area by the total population in that area. Note -- income is not collected*

Civilian Labor Force in the New England Region

Region/State	2013			
(in thousands)	Civilian Labor Force	Em- ployed	Un- employed	Unempl. Rate (%)
Hillsborough County	230.4	217.9	12.5	5.4
Rockingham County	178.0	167.8	10.2	5.7
New Hampshire	742.1	702.9	39.1	5.3
Connecticut	1,860.0	1,715.0	145.0	7.8
Maine	709.0	662.0	47.0	6.7
Massachusetts	3,484.0	3,238.0	246.0	7.1
Rhode Island	556.0	503.0	53.0	9.5
Vermont	351.0	336.0	15.0	4.4
New England	7,702.0	7,157.0	545.0	7.1
United States	155,389	143,929	11,460	7.4

Region/State	2014			
(in thousands)	Civilian Labor Force	Em- ployed	Un- employed	Unempl. Rate (%)
Hillsborough County	228.6	218.3	10.3	4.5
Rockingham County	175.7	167.5	8.2	4.7
New Hampshire	741.0	709.0	32.0	4.3
Connecticut	1,885.0	1,760.0	125.0	6.6
Maine	669.0	659.0	40.0	5.7
Massachusetts	3,577.0	3,353.0	205.0	5.8
Rhode Island	553.0	511.0	42.0	7.7
Vermont	349.0	335.0	14.0	4.1
New England	7,785.0	7,327.0	458.0	5.9
United States	155,992	146,305	9,617	6.2

Region/State	Change 2013 to 2014			
(in thousands)	Civilian Labor Force	Em- ployed	Un- employed	Unempl. Rate (%)
Hillsborough County	-1.8	0.4	-2.2	-0.9
Rockingham County	-2.3	-0.3	-2.0	-1.0
New Hampshire	-1.1	6.1	-7.1	-1.0
Connecticut	25.0	45.0	-20.0	-1.2
Maine	-40.0	-3.0	-7.0	-1.0
Massachusetts	93.0	115.0	-41.0	-1.3
Rhode Island	-3.0	8.0	-11.0	-1.8
Vermont	-2.0	-1.0	-1.0	-0.3
New England	83.0	170.0	-87.0	-1.2
United States	603	2,376	-1,843	-1.2

Source: U.S. Bureau of Labor Statistics

for people under 15 years old even though those people are included in the denominator of per capita income. This measure is rounded to the nearest whole dollar.

Money income includes amounts reported separately for wage or salary income; net self-employment income; interest, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

Receipts from the following sources are not included as income: capital gains; money received from the sale of property (unless the recipient was engaged in the business of selling such property); the value of income "in kind" from food stamps; public housing subsidies; medical care; employer contributions for individuals;etc.; withdrawal of bank deposits; money borrowed; tax refunds; exchange of money between relatives living in the same household; gifts and lump-sum inheritances; insurance payments; and other types of lump-sum receipts.

Table F-3 in the Appendix lists the per capita income for the 12-month periods during the years 2010, 2011, 2012, and 2013, dollars for the municipalities within the CEDS region, as well as Hillsborough and Rockingham counties, New Hampshire, and the United States. In addition, a summary of the average annual household incomes for the REDC region is listed below. Note that the subregional and regional values are averages of the communities within the region, rather than a true value based on individual counts.

In 2013, the average per capita income for the REDC region, generated from the ACS 5-year data from 2009-2013 and adjusted to 2013 dollars, was $40,798, which was up $565 or 1.4% from 2012. On average, the entire REDC region, the two-county area in our region, and the state all experienced an increase in the per capita income from 2010 to 2013; however, the Western subregion experienced a reduction in average per capita income in the most recent year's data. Several of the towns within the Western subregion experienced a decline from 2012 to 2013, most notably Litchfield, down 4.6%, and Merrimack, down 3.4%.

Average Per Capita Income

Town/Area	2010	2011	2012	2013	1 year change 2012 - 2013	% change 2012 - 2013
CEDS Eastern Communities	$43,039	$46,329	$47,840	$47,955	$115	0.2%
CEDS Central Communities	$33,922	$34,275	$34,548	$35,888	$1,340	3.9%
CEDS Western Communities	$35,235	$36,675	$37,448	$37,348	-$100	-0.3%
REDC CEDS region	$37,676	$39,381	$40,233	$40,798	$565	1.4%
Hillsborough County	$33,108	$33,653	$34,208	$34,390	$182	0.5%
Rockingham County	$35,889	$37,422	$37,820	$38,399	$579	1.5%
New Hampshire	$31,422	$32,357	$32,758	$33,134	$376	1.1%
United States	27,334	$27,915	$28,051	$28,155	$104	0.4%

Data Source: American Community Survey five-year estimates

At $40,798, the REDC region's average per capita income for 2013 was $12,643, or 45%, greater than the United States average of $28,155. Although not as large of a difference, the New Hampshire state average of $33,134 annual income is still 18% greater than that of the nation. Looking within the REDC Region, the Eastern subregion has the highest per capita average at $47,955 annually, which is 71% greater than the national average in 2013. The larger per capita income in the Eastern subregion correlates with higher cost of living as seen by the housing prices and weekly rental rates in those communities. Also, as discussed in prior CEDS documents, the Seacoast communities have a higher percentage of older persons of retirement age than the other subregions. Retirement nest eggs, second homes, and other income traditionally held by retirees may also influence the higher per capita income found in the Eastern subregion.

Background Conditions

Looking within the REDC region in 2013, there was one community with a per capita income less than the national level. The town of Raymond's average of $27,755 was the lowest in the region and $400 less than the U.S. level. New Castle saw the highest per capita income level at $82,879 annually. Meanwhile, the town of Kingston in the Central subregion saw the largest one-year increase from 2012 to 2013, at over 24% or $7,241, and East Kingston in the Eastern subregion had the largest decrease in income, down $4,521 or 10.3% during that same time period.

Land Use

Changes in population growth and physical development after World War II have had profound effects on land use in the REDC region. The historical view of population growth observed from the U.S. Census data shows that through much of its early history, the population in the region was relatively stable. The post-war boom that began in 1950 resulted in a quadrupling of the population, from 112,500 people in 1950 to 430,285 people in 2000.

The historical landscape and land use characteristics of the region were significantly altered as a result of this growth, not just because of the number of people, buildings, and infrastructure added, but because of how this growth was accommodated. The land area of the region was primarily rural at the beginning of this growth period. Only a few communities had densely developed town and city centers and the sewer and water facilities to support them. As the region grew, most communities avoided building sewer and water infrastructure due to the costs associated with construction and management and the desire to remain rural. The decision to not provide sewer and water treatment resulted in lower density, sprawling developments requiring onsite water supplies and treatment of wastewater. Residential development, along with roads and traffic, grew rapidly, along with a separation of residential and commercial uses, stunting town center development, and the creation of large commercial development along major roadways.

Today, the rural to urban continuum continues in the region. Residential development is distributed throughout communities, and commercial and industrial development is concentrated primarily in urban centers and along major transportation corridors. Many towns in the region retain a low population density, yet struggle to maintain a truly rural character in the face of lost agricultural and forest land and low-density but widespread residential subdivisions. Nearly seven out of ten acres in the region remain as undeveloped land (forest, agriculture, wetland, and open land), however the undeveloped land is much more fragmented by roads and buildings. Local and regional efforts to conserve open space and natural habitats through conservation continue, resulting in approximately 20% of land in the region conserved from development.

The REDC CEDS region and subregions exhibit considerable variations in land use. Geographic Information Systems (GIS) analysis by the Rockingham Planning Commission of 2010 data highlights the following:

- Land use in the CEDS Eastern Subregion to be comprised of 34.1% forested land, 29.9% developed land, 23.4% undeveloped or wetlands, 7.3% water, and 5.3% agricultural land. Developed land in this region increased by 3.6% since the 2010 CEDS, from 32,791 acres to 37,292 acres.
- Land use in the CEDS Central Subregion was 61.0% forested, 18.7% developed, 12.7% undeveloped or wetlands, 4.3% water, and 3.4% agricultural. Developed land in this region increased by 2.1% since the 2010 CEDS, from 42,461 acres to 47,785 acres.
- Land use in the CEDS Western Subregion was 56.3% developed, 19.9% forested, 18.4% undeveloped or wetlands, 2.9% water, and 2.5% agricultural land. Developed land increased by 11.7% since the 2010 CEDS, from 75,309 acres to 96,864 acres.
- Land use in the CEDS portion of Hillsborough County, the most densely developed region, was 70.3% developed, 25.3% undeveloped or wetlands, 2.6% water, 1.9% agriculture, and zero percent forested. Land use data for this region is collected by the Nashua Regional Planning Commission in a manner different from the other CEDS regions. Forested areas are included as part of the primary use of each parcel, with parcels of completed forested land classified as vacant, making it difficult to compare land use to the other regions.
- Land use in the entire CEDS region was 42.1% forested, 32.9% developed, 16.9% undeveloped or wetlands, 4.6% water, and 3.5% agricultural. Developed land increased by 5.5% since the 2010 CEDS, from 150,661 acres to 181,941 acres. Forested land decreased 5.6%, from 262,097 acres to 232,810 acres. Agricultural land decreased .4%, from 21,562 acres to 19,463 acres.

The four Regional Planning Commissions operating in the REDC region – Rockingham Planning Commission, Strafford Regional Planning Commission, Southern New Hampshire Regional Planning Commission, and Nashua Regional Planning Commission – maintain regional buildout analyses to estimate the maximum amount of future development that would be possible under current zoning and land use regulations. Buildout results are available by town level and aggregated for each regional planning commission. These analyses take into account land use and zoning constraints, lot and building dimensional requirements, environmental protection overlays such as wetlands and shoreland buffers, and conservation land that is deed restricted and cannot be developed. Based on current zoning and land use regulations, the potential for a 70% increase in the number of new dwelling units exists. Despite this, retaining rural character remains a common desire expressed in local master plans.

Land Use / Land Cover - 2010
Regional Economic Development Center
Comprehensive Economic Development Strategy
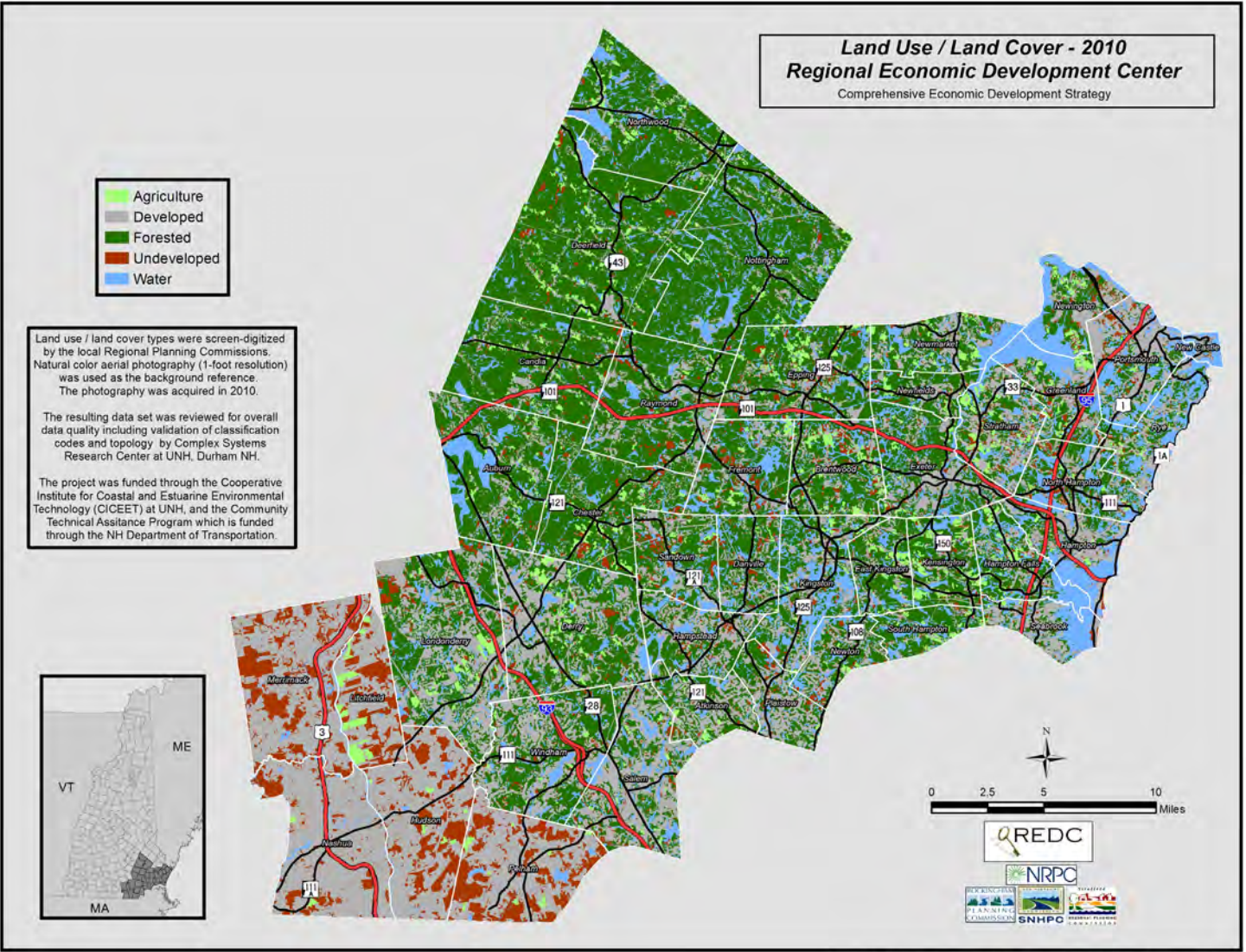
Infrastructure

"We should modernize our streetscapes layout and fix our 100-year-old sewer lines all in one motion. If we are going to tear up the streets, we should go ahead and fix the whole system."
- stakeholder comment at the Nashua workshop

Transportation Systems

The REDC region is served by a well developed roadway network, a geographically limited public transportation system, and a large variety of domestic and international freight transportation carriers. All modes of transport and goods movement are available within or near to the region, including the Port of New Hampshire, Pan Am Railways main line, and the airports located in Portsmouth and Manchester.

Transportation planning in the region is the responsibility of the regional planning commissions in coordination with state, regional, and local governments. This activity is carried out through the federally mandated Metropolitan Planning Organization (MPO) process, which identifies and prioritizes transportation improvements.

Highways – An extensive roadway network serves the region. Major north-south highways include Interstates 93 and 95, NH Routes 16, 28, 102, 125, and U.S. Route 1. Interstate 95 serves as the major transportation corridor between southern and northern coastal New England and the Maritime Provinces of Canada. Its connection to NH Route 16 in Portsmouth allows it to serve as a vital link for travel to the Lakes Region,

I-93 High Speed Toll. Image courtesy of NH Department of Transportation.

White Mountain Region, and northern New Hampshire. Interstate 93 runs from the Massachusetts state line, through the cities of Manchester and Concord and, ultimately, to Interstate 91 in Vermont. NH Route 125 serves an increasing volume of local inter-state traffic from the Massachusetts line northerly through the region and beyond. All three highways link with Interstate 495 in Massachusetts, providing access to the Boston metropolitan area. The region's east-west highway network is not as well developed, with access provided primarily by NH Route 101 across the center of the region, NH Route 111 in the south and U.S. Route 4 in the north.

Public Transportation – Public Transportation plays an important and growing role in addressing mobility, traffic congestion, and air quality issues facing the region. The number of communities in the region served by transit has increased and ridership on all forms of transit has seen a dramatic growth in response to rising fuel prices and growing transit dependent populations. Despite an increase in demand, many towns in the region are not served by public transportation and significant challenges exist to expanding services, including funding availability and low density development patterns, making fixed-route service inefficient.

A variety of public and private transportation operators provide local, regional, and specialized public transit services in the REDC region. Services include local fixed-route and demand-response public transportation services, intercity bus service along the I-95 and I-93 corridors, and intercity rail service via the Amtrak Downeaster line. Specialized transportation services are also provided by numerous human service and health organization for their clients, as well as seasonal/tourist trolley services.

Fixed-route local bus service is limited to the more populated urban communities in the region. The Cooperative Alliance for Seacoast Transportation (COAST) operates several routes in Rockingham and Strafford Counties. The University of New Hampshire's Wildcat Transit system provides service from the Durham campus to surrounding communities. There is

limited access to the Massachusetts - based Merrimack Valley Regional Transit Authority (MVRTA), with a single stop at the State Line Plaza in Plaistow. The Greater Derry-Salem Cooperative Alliance for Regional Transportation (CART) provides demand response, curb to curb services in several communities. In addition, the NH Department of Transportation operates several Park & Ride facilities to support commuters in the region.

Commuter bus service to Boston from the region is provided by four private commuter bus operators – C & J, Boston Express, Concord Coach Lines, and the Coach Company. In addition, many residents travel to Massachusetts Bay Transportation Authority commuter rail stations in the Massachusetts cities of Lawrence, Lowell, Haverhill, and Newburyport. The most recent bus service in the region is the East West bus service connecting Portsmouth with the Manchester-Boston Regional Airport and downtown Manchester. Operated by Flight Line, the East West Express runs daily round trips between the Portsmouth Transportation Center and Manchester airport, with stops in Epping and downtown Manchester.

Airports – The REDC region is served by two regional airports, Manchester-Boston Regional Airport in Manchester and Portsmouth International Airport at Pease. The airport at Pease opened for civilian use in 1991, following the closure of the Pease Air Force Base, and offers limited air passenger and freight flights as well as corporate and general aviation. Manchester-Boston Regional Airport provides passenger, cargo, and general aviation air services. The airport averages 3.2 million passengers and 175 million pounds of cargo per year.

Freight – Intermodal freight such as truck, rail, air, and ocean shipping play an important role in the region's continued economic development. Many businesses rely on freight service to meet the needs of their customers and to receive raw materials for use in production. The movement of goods in the region is accomplished by a variety of freight options – air, rail, truck, pipeline, ships, and multiple modes, including mail. 70% of freight movement is made by truck, 20% by multiple modes including mail, 3% by air, and 2.5% by ship. Rail freight access has significantly declined, while motor carrier freight access has dramatically increased.

The region is served by direct airfreight services at

Pease Air National Guard Base, N.H—Airmen from the 157th Air Refueling Wing perform a routine phase inspection on a KC-135R Stratotanker, June 11, 2014. (N.H. Air National Guard photo by Staff Sgt. Curtis J. Lenz.)

Pease International Tradeport. The fixed-base operator at Pease Airport provides cargo handling by truck and air. The facility can accommodate the largest cargo planes and has 45,000 square feet of warehouse facilities in close proximity to rail, deep water port, and Interstate 95. Boston's Logan Airport and the Manchester-Boston Regional Airport are located less than 50 miles away, adding access to a wide variety of air cargo serving markets throughout North America and the world.

The REDC region is served by the mainline of Pan Am Railways, a major U.S. regional railroad, historically known and the Boston and Maine Railroad. The mainline is categorized as a Class 4 track, which allows passenger speeds up to 80 mph and freight rail. Branch line freight services are currently available between the main line and Portsmouth and over the Sarah Long Bridge into Maine on a Class 1 track. Intermodal (rail-truck) facilities operated both by Pan Am and Conrail in the Boston area and by the St. Lawrence and Atlantic Railway in Auburn, Maine are within easy reach of the region. Through these connections, shippers have access by rail to points throughout North America, and are using Rail Land Bridge services throughout the world.

Portsmouth is home to the Port Authority of New Hampshire, a division of the Pease Development Authority, a deep-water port with wharves, piers, warehouse space, and rail access. The port handles over 8.8 million tons of cargo each year and U.S. DOT estimates the amount of cargo handled will double by

2040. The Division of Ports and Harbors Market Street Marine Terminal, located on the Piscataqua River, is the only public access, general cargo terminal on the river. The port is a designated Foreign Trade Zone, a special designation awarded by the U.S. Department of Commerce, enabling incentives for business to locate within the zone, including the reduction, deferment, or elimination of custom duties on imports.

Sewer and Water Systems

There are ten municipal sewer systems operating wastewater treatment facilities in the REDC region, primarily servicing the more suburbanized and urbanized communities. Many of these facilities were built over 40 years ago and require expensive upgrades in order to meet more stringent water quality protection regulations mandated by the federal National Pollutant Discharge Elimination System (NPDES). All of the communities currently operating sewer systems are developing plans for infrastructure improvements, including retrofitting treatment plants to reduce pollutant discharge or building new systems. The NH Department of Environmental Services (DES) estimates cost associated with wastewater treatment infrastructure improvements statewide to be $1.7 billion, with approximately $350 million in the REDC region.

Municipalities in the region are also making significant investments in infrastructure to manage stormwater. Water pollution from stormwater runoff accounts for over 80% of the pollution entering surface waters in the region. Much of this stormwater comes from rain and snowmelt running off of roads, parking lots, roofs, and across lawns and fields. Many municipalities are required by U.S. EPA to comply with the NPDES Stormwater Program, and EPA is promulgating new rules that will require more towns to comply. The rules require towns and cities to identify and remove sanitary and other wastes from stormwater systems, monitor the water quality of stormwater, and encourage low impact development and the installation of green infrastructure, such as rain gardens. Economic development in the REDC region relies on a healthy natural environment coupled with strong and resilient communities. The estimated cost to install and upgrade stormwater infrastructure in the region is estimated to be over $50 million. Municipal investment to improve wastewater infrastructure will be an ongoing need in the region for years to come.

There are 14 large water systems operating in the REDC region, the majority owned and operated by municipalities. All but two of these systems rely on groundwater withdrawals to meet demand. Systems operated by the towns of Exeter and Salem rely on surface water withdrawals. The DES Drinking Water and Groundwater Bureau works with water system operators, both public and private, to implement local groundwater protection programs, promote water conservation, and ensure accurate water use and testing. DES estimates over 72% of the population in the region is served by community water systems, with the remaining served by private wells.

The U.S. Geologic Survey and NHDES have worked cooperatively to study water resources in the region and to predict demand. As a result, it is estimated that demand for water in the region is expected to grownby more than 50% by 2025, to more than 40 million gallons per day. The estimation reflects demand for water by homes, business, industry, and irrigation. Residential use accounts for more than 70% of all water use in the region, and the type of housing development significantly affects the amount of water used. Homes in less urbanized areas with extensive lawns consumed a much greater volume of water than homes in areas with a higher population density. As the population of the region continues to grow, it will be important for communities and water suppliers to make land use and other policy decisions that protect ground and surface water resources, and maximize the efficient use of water.

Utilities

New Hampshire sources nearly 90% of its energy from out of state, and petroleum and nuclear power alone comprise 55% of the state's total energy portfolio. (Graph in RPC regional master plan shows types of energy used). The graphs on page 31 shows the types of energy used and their relative percent of consumption. Of the energy produced in-state, 79% is derived from nuclear power and natural gas, with lesser use of renewable sources, hydroelectric, coal, and petroleum sources. Total energy production in the state is derived from 89% non-renewable and 11% renewable sources.

Types and Relative Percentage of Fuels Consumed in New Hampshire

- Petroleum 37%
- Nuclear Power 28%
- Natural Gas 16%
- Coal 8%
- Wood, Wood Waste 6%
- Hydro 4%
- Fuel Ethanol 0.10%
- Wind 1%
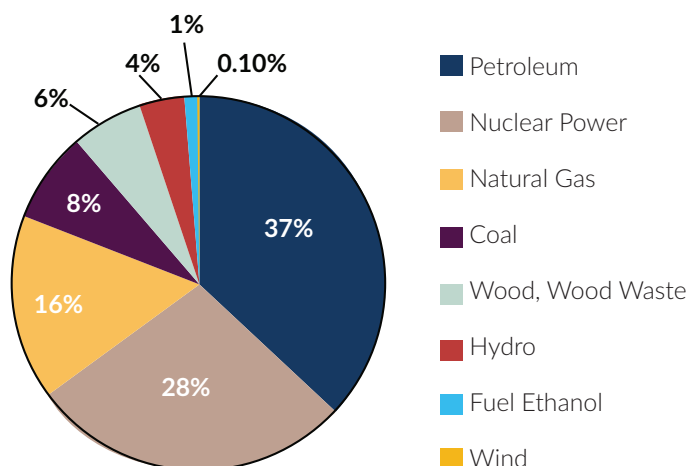
Data Source: U.S. Energy Information Administration (2010)

Types and Relative Percentage of Energy Produced in New Hampshire.
(% total generated, 2011)

- Coal 6.6%
- Hydro 6.7%
- Wind 0.2%
- Nuclear Power 42.5%
- Petroleum 7.2%
- Renewables
- 36.5%
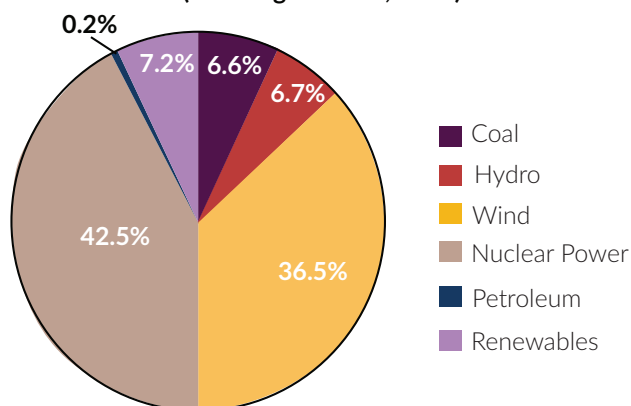
Data Source: 2012 Vital Signs NH ELMI

Electric Services

Four electric utilities serve the REDC region: Eversource (formerly PSNH), Unitil, New Hampshire Electric Cooperative, and Granite State Electric. Eversource is the largest provider of electricity in the region and operates two power generation plants, Schiller Station in Portsmouth, which burns coal, oil, and wood, and the Newington Station in Newington, which burns gas and oil. NextEra Energy operates a nuclear power facility in Seabrook, known as the Seabrook Station. With its 1,244 megawatt electrical output, Seabrook Station is

the largest individual electrical generating unit on the New England power grid.

Each utility offers a variety of residential, business and municipal energy efficiency, purchasing and rebate programs focused on retrofits, replacement systems and new construction. New Hampshire's regulated electric distribution utilities jointly develop and offer their customers energy efficiency programs under a statewide program known as NH Saves.

Natural Gas Services

The distribution of natural gas in the region is provided by three utilities regulated by the NH Public Utilities Commission - Unitil, Keyspan, and Energy North. Gas supply for residential, commercial, and industrial customers is provided by two gas transmission pipelines running from Dracut, MA, into Salem, NH, and north through Plaistow, Newton, East Kingston, Exeter, Stratham, Greenland, Portsmouth, and Newington. The six-inch gas line is owned by Unitil and is linked to the major, nationwide natural gas distribution system. An eight-inch line runs parallel to this line from Plaistow to Exeter. An inter-state, high pressure, 30-inch gas transmission pipeline owned jointly by Portland Natural Gas Transmission System and Maritimes & Northeast Pipeline runs through Rockingham County, providing access to gas production facilities in Nova Scotia and western Canada.

Telecommunications and Broadband

Telecommunications service, both analog and digital, are reliably available in most parts of the region. High speed internet, commonly referred to as broadband, has become an essential component to the region's success, providing service for telemedicine, education, teleconferencing, email, and more. The development of a national broadband access system has been compared to the creation of the interstate highway system in the mid-twentieth century and to the establishment of a reliable, standardized electrical distribution system in the early 20th century. The REDC region has benefited from several state-led broadband planning initiatives to identify areas served and not served by broadband and an analysis of consumer satisfaction with existing broadband services. Results for the REDC region indicate most sectors of the economy perceive broadband service to be adequate, with approximately 80% of internet consumers using broadband service. With only two primary broadband providers in the region, Comcast and Fairpoint, a lack of competition among providers is seen as preventing consumer choice and creating high costs.

Environmental Conditions & Assets

Swamplands, Newfields, NH.

Water Quality

Since 1990, the amount of developed land in the Regional Economic Development Center's region has nearly doubled. As forest and farmland is converted to buildings, roads, and parking lots, the amount of impervious surface increases, causing rain and snowmelt to wash across the surface and carry pollutants into rivers and streams, lakes and ponds, Great Bay, and the Atlantic Ocean. From 1990 to 2010, the rate of impervious surface created in the region outpaced the population growth, with the amount of impervious surface doubling while the population grew approximately 20 %.

For the REDC region, the increase in impervious coverage has resulted in a decline in water quality, causing long-term impacts to the natural environment, municipal budgets, and land development. In 2008 the NH Department of Environmental Services (DES) designated the Great Bay Estuary as an "impaired" waterbody that does not meet state water quality standards. Many of the municipalities in the REDC region lie within the Great Bay watershed and as a result, permits and approvals required by federal and state agencies for infrastructure such as wastewater treatment plants have invoked stricter requirements and higher costs. New federal, state and local regulations for stormwater management for new development

and redevelopment have been adopted or are pending in order to mitigate the impacts of development to protect water quality.

In addition to Great Bay, many of the rivers, lakes, and ponds in the REDC region are listed as "impaired or threatened by a pollutant or pollutants" by DES. DES is required by the Federal Clean Water Act to compile and report every two years on the quality of surface water in the state. The listing of a water body on the impaired list is a catalyst for enacting change in local land use regulations and for educating homeowners and businesses about threats to water quality and how these threats can be reduced or prevented. There are many agencies and organizations able to assist municipalities and businesses with protecting water quality in the region, including the DES, the Piscataqua Region Estuaries Partnership (PREP), and the regional planning commissions.

Water Quality in
NH's Great Bay Watershed

Several communities in the REDC region are in the midst of planning for infrastructure improvements required by federal and state regulators to improve and protect water quality in the Great Bay watershed. These infrastructure improvements will include retrofitting existing municipal wastewater treatment plant systems and/or building new treatment plants, replacing and rehabilitating existing sewer systems, and correcting combined sewer overflow systems. Discussions about these improvements involve municipal officials, state and federal regulators, scientists, environmental organizations, business and industry representatives, and residents.

Town of Exeter – Exeter has received a final (National Pollutant Discharge Elimination System (NPDES) permit from the EPA for its wastewater treatment plant (WWTP). As part of an Administrative Order on Consent (AOC), the town has five years to build/retrofit a plant that discharges no more than eight mg/liter of nitrogen to the Squamscott River. The Town will then have five years to operate the plant. If water quality in the Squamscott River is showing improvement, and the town has taken positive steps towards reducing nonpoint sources of nitrogen, no further reductions from the treatment plant are necessary. If these conditions are not met, additional nitrogen reductions

will need to be put in place within five years. The town is currently working on a facility plan that will lead to a preferred design and eventually final design and construction. The cost of the new plant is estimated to be in the range of $40 million-$48 million.

Town of Newmarket – Similar to Exeter, Newmarket has an AOC and is working towards a new facility. The town has secured funding for the new plant and is working on final design plans. The cost is estimated to be about $14 million.

City of Portsmouth – Portsmouth is under a court order to build a WWTP. That plant is now entering the final design phase and the City Council has voted to include nitrogen treatment into that design. In addition, EPA sent a letter to Portsmouth suggesting the nitrogen permit limit for that plant will be 8 mg/l. No new EPA permit has been drafted. The design of the new plant should be completed in 2015. The city is talking with surrounding communities about the feasibility of constructing a regional wastewater treatment plant at Pease.

Town of Durham – Durham has been on a different track from the other communities. Durham has improved its WWTP over years and now has a relatively low nitrogen effluent concentration (5-8 mg/l) compared to other watershed communities. Durham has been working on an approach and plan that would integrate the point and nonpoint source permits for the both the town and UNH in a comprehensive permit. This work has been expensive (greater than $500,000) but, for the present, EPA appears to have no plans to issue new permit requirements for Durham.

Great Bay, Stratham, NH.

City of Dover – Dover has received a draft permit from EPA which would limit its effluent concentration of nitrogen to 3 mg/l. EPA has not written a final permit for Dover. In the meantime, Dover has elected to move forward with an upgrade to the current WWTP at a cost of about $8 million which would result in an effluent concentration of 8 mg/l. It is unknown when EPA will finalize the final permit.

City of Rochester – Rochester does not have a draft permit. However, the city has moved forward on nitrogen reductions in two ways. First, the Turnkey Landfill has installed new pretreatment technology which has and will dramatically lower the effluent arriving at the Rochester treatment plant from the landfill. In addition, the plant has made upgrades to pumps which will allow for improved nitrogen reduction. It is estimated that these changes will yield an effluent concentration of about 10 mg/l, which is about one-quarter of the historic rate.

Economic development in the REDC region relies on a healthy natural environment coupled with strong and resilient communities. The challenges posed by improving and protecting water quality will influence public and private sector investment in the region in the coming years.

Open Space/Conservation Land

The significant population growth and land development in the REDC region in the past four decades has put increasing pressure on remaining natural and open spaces. Much of this open space is vulnerable to being developed because of its high value for residential and commercial uses. Significant local and state conservation efforts began in the 1970s with agriculture preservation easements, followed by conservation and preservation action fostered by the Land Conservation Investment Program in the 1980's and the current Land and Community Heritage Investment Program.

The state-enabled Current Use program is a form of preferential property taxation used to encourage land conservation and the preservation of the rural landscape. The goal of Current Use is to enable property owners to maintain their farm and forest land without being taxed at rates that force changes in land use. Since the NH General Court enacted RSA 79-A in 1973 and established the Current Use program, over three million acres have been enrolled by landowners seeking to maintain the working landscape of farms and forests.

Most communities in the region have put land conservation goals into action by using dedicated local funds and grant funds from conservation agencies and organizations, resulting in the permanent conservation of 20% of the land in the REDC region. Conservation organizations, including the Great Bay Resource Protection Partnership, Southeast Land Trust, and Bear-Paw Regional Greenways, have worked with landowners to protect thousands of acres of land and hundreds of miles of shoreline.

Land conservation priorities for the region have been developed using science-based information that identifies land critical for wildlife habitat, drinking water supplies, production of food and forest products, and adaptation to climate change. Two reports that document conservation priorities are The Land
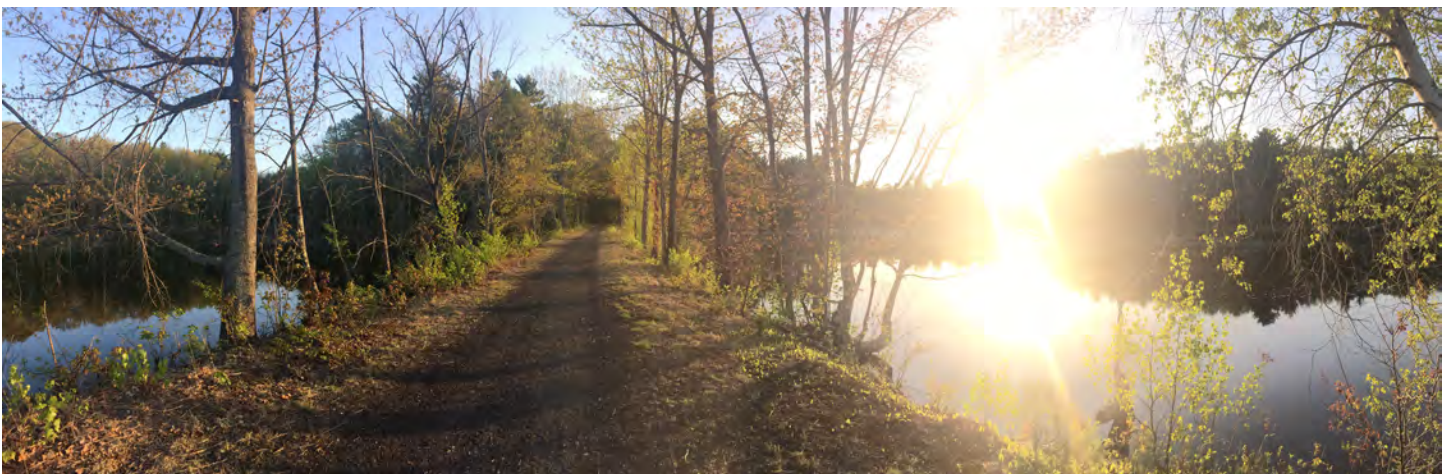
A section of the Portsmouth Branch-Rockingham Recreational Trail.

Conservation Plan for New Hampshire's Coastal Watershed (2005):
http://www.rpc-nh.org/PDFs/docs/coastal-conservation/Coastal_Plan_Complete.pdf,
and A Land Conservation Plan for the Lower Merrimack River Watershed (2014):
http://www.forestsociety.org/sites/default/files/Merrimack%20Plan%20Technical%20Report%20FINAL%20July%202014.pdf.

Estuarine and Coastal Resources/ Ecosystems

The Great Bay estuary, Hampton/Seabrook estuary, tidal rivers, and Atlantic Ocean coastline are significant components of the natural, aesthetic and economic character of the REDC region. Protecting these unique ecosystems is important in supporting the region's character and quality of life, both of which attract new residents, businesses, and tourists.

Several institutional mechanisms are in place to help manage estuary and coastal resources, especially the effects of growth and development on these unique ecosystems:

- The New Hampshire Coastal Program is one of 34 federally approved coastal program authorized under the Coastal Zone Management Act and is administered by the NH DES. The Coastal Program provides funding and staff assistance to municipalities, regional planning commissions, and regional organizations to protect water quality, restore coastal habitats, and help make communities more resilient to flooding and other natural hazards. The Coastal Program supports the region's economy by helping to preserve the environmental health of the coast and Great Bay and Hampton/Seabrook estuaries for fishing, shellfishing, and assistance with maintenance of ports, harbors, and tidal rivers for commercial and recreational uses. http://des.nh.gov/organization/divisions/water/wmb/coastal/

- The Great Bay Estuarine Research Reserve (GBNERR) is part of a national network of protected areas and promotes long-term research, education and stewardship throughout Great Bay estuary. Created under the Coastal Zone Management Act, the National Estuarine Research Reserve partnership program between the National Oceanic and Atmospheric Administration (NOAA) and the coastal states protects more than one million acres of the nation's most important coastal resources. The NH Fish and Game Department manages the Great Bay Reserve, which was designated in 1989. The Reserve is also supported by the Great Bay Stewards, a non-profit friends group. www.greatbay.org

- The Piscataqua Region Estuaries Partnership (PREP) is a part of EPA's National Estuary Program, a joint local/state/federal program established under the Clean Water Act with the goal of protecting and enhancing nationally significant estuarine resources. PREP is administered by the University of New Hampshire. PREP is responsible for developing and maintaining the region's Comprehensive Conservation and Management Plan, which outlines key issues and priorities related to management of Great Bay and Hampton/Seabrook estuaries, and proposes strategies to preserve, protect, and enhance the estuaries. Projects that address these priorities are undertaken throughout the region in partnership with state agencies, municipalities, and regional conservation organizations. www.prepestuaries.org

- The Sea Grant program is administered by the University of New Hampshire and is a federal/university partnership whose mission, as mandated by Congress, is to foster sustainable development of the nation's coastal resources. Sea Grant supports research, education, and outreach to help balance the conservation of coastal and marine resources with a sustainable economy and environment. Sea Grant addresses a broad range of issues including aquaculture, marine biotechnology, seafood processing, the development of marine products, fisheries recruitment and conservation, and marine policy. www.seagrant.unh.edu/about-us

Solid Waste Disposal

NH state law (RSA Chapter 149-M) requires all municipalities to participate in a solid waste management district, which is responsible for preparing and maintaining a long-range plan for the management and disposal of solid waste. RSA 149-M establishes a statewide recycling goal of 40%. The law establishes a hierarchy of preferences for waste disposal, with source

reduction the top preference, followed by recycling and reuse, composting, waste to energy, incineration without energy recovery, and landfilling. Statewide, DES estimates that 35% of the municipal solid waste generated in New Hampshire is recycled, 33% is landfilled, 27% is converted from waste to energy, 5% is exported, and less than 1% is incinerated without energy recovery.

The majority of municipalities in the REDC region send their solid waste to facilities outside the region, relying primarily on a landfill operated by Waste Management in Rochester, and waste-to-energy incinerators in Massachusetts. The Waste Management landfill in Rochester has an estimated life to 2022 and the potential for expansion. There is one DES permitted composting facility in the region: Seacoast Farms in Fremont.

Hazardous Waste Management

The majority of municipalities in the REDC region provide annual or semi-annual household hazardous waste collections for residentially generated hazardous wastes, such as paint, automotive fluids, and pesticides. Funding is available from the NH DES to assist municipalities and solid waste districts with costs associated with properly collecting and disposing of household hazardous waste, including the costs associated with contracting with a registered hazardous waste generator. Industrial and commercial generators of hazardous waste are obligated to make their own arrangements with licensed hazardous waste transporters to remove and dispose of such wastes. DES continues to work with municipalities, industry, and residents to reduce the amount of toxicity in products purchased for the home and for manufacturing.

Regional Brownfields Program

Brownfields are properties that may be polluted or are perceived to be polluted, and this stigma of contamination may prevent redevelopment. Brownfields sites exist throughout the REDC region, in every community, and represent enormous economic development potential. Properties can include closed gas stations and auto body repair shows, manufacturing mills, and commercial and industrial sites. The U.S.

Zach Tompkins Memorial Field, a recently developed Brownfields Site in Hudson, NH, is ready and waiting for its second coat of pavement, turf, and -- most importantly -- the first young players to arrive. Tentative opening is planned for fall 2015.

EPA's Brownfields Program provides competitive grants to states, municipalities, tribal authorities, and regional planning and economic development organizations to support the identification, assessment, clean-up, and redevelopment of Brownfields. Cleaning up and reinvesting in these properties increases local tax bases, facilitates job growth, utilizes existing infrastructure and alleviates development pressure on undeveloped land in the region.

The EPA manages a competitive grant program to provide government and redevelopment agencies with funds to conduct environmental site assessments and cleanup activities on properties poised for redevelopment. The assessments can provide critical information for property owners and developers on potential sources of water and soil contamination and ways to mitigate contamination to protect human health and the environment. Grant funds may be available for properties in the REDC region; contact the REDC office for information.

With grant funds from EPA, REDC maintains a Brownfields Revolving Loan Fund (RLF) to provide low interest loans and sub-grants to conduct clean-up activities on selected Brownfields sites in the region. The RLF funds are available for anyone anticipating cleaning up a contaminated property for redevelopment, as long as the applicant is not responsible for the contamination. Low interest loans, typically three %, are available for expanding businesses, developers, non-profit organizations, and municipalities. Sub-grants can be awarded to municipalities and non-profit organizations only. Eligible clean-up activities include the installation of fences and drainage systems, capping, excavation and removal of contaminated soils,

and removal of drums, tanks and other sources of hazardous materials. For more information on the RLF and the application process, visit the REDC website, www.redc.com, or call the office, 603-772-2655.

The City of Nashua, NH manages a Brownfields Assessment and Cleanup Program for sites in that community. For more information, contact the City of Nashua's Community Development Department at 603-589-3095, www.gonashua.com.

Air Quality

The Clean Air Act Amendment (CAAA) of 1990 requires that all areas of the country meet federal standards for air quality. The CAAA resulted in the identification of non-attainment areas in the REDC region in southeastern New Hampshire. As of January 2015, the U.S. EPA lists non-attainment areas in Rockingham, Hillsborough, and Merrimack counties for the pollutant sulfur dioxide. The CAAA mandates that the state implement measures to reduce emissions of the non-attainment pollutant.

The NH DES Air Resource Division operates a network of Air Quality Monitoring Stations throughout the state to measure meteorological parameters and levels of ozone, sulfur dioxide, nitrogen oxide, carbon monoxide, small particle pollution, and other pollutants of concern in outdoor air. Air pollutants are emitted from a number of sources, but are generally categorized as either "mobile" or "stationary" sources.

Because motor vehicles (a mobile source) are the single largest emitters of ozone emissions in the United States, transportation planning must consider the effect of vehicles and traffic on air quality. The CAAA specifies that transportation plans, programs, and projects must not worsen existing air quality, not create any additional violations, and not delay attainment of standards. In addition, once a mobile source emissions budget has been established for a non-attainment area, the annual emission produced from all sources must fall at or below that budget. The budget does not grow with the population or economic activity, rather it is an absolute budget that cannot be exceeded, regardless of growth in the region. As a result, the region's long range transportation plan is rigorously reviewed prior to being approved and funded to determine if it is in conformity with air quality goals and objectives.

For stationary sources, the CAAA has established a federal permitting program title, "New Source Review" (NSR) to protect air quality from the nation's major sources of air pollution. In the REDC region, stationary sources include factories and power plants. In New Hampshire, non-attainment requirements apply to sources that emit nitrous oxide and volatile organic compounds. Both an existing major source or new major source wishing to expand operations may have to install state of the art pollution control devices and purchase emissions offsets.

In the REDC region, the greatest ongoing challenge for meeting attainment will continue to be the mobile source sector, primarily because the use of automobiles, measured in vehicle miles traveled, continues to grow at a faster rate than the population. It will take improvements in auto emission technology and the development of effective alternatives to single occupant vehicle use to stay within fixed emission budgets set for the region.

Stuart Farm, Stratham, NH.

Agricultural and Forest Resources

Farming and forestry are integral to the history of the REDC region and continue today as valued and critically important activities.   Farming and forestry were once predominant land uses across New Hampshire, but the region's population growth has led to residential and commercial development encroaching on activities that can often be regarded as incompatible with housing subdivisions and retail centers.   Common practices of the working landscape, such as fertilizing fields and timber harvesting, may be seen as detrimental to property values when conducted near residential developments. Municipal land use regulations have been adopted to deal with such conflicts, resulting in regulations that may restrict backyard farming and the production of local food and forest products.

The past decade has seen a strong interest in purchasing locally grown food and other agricultural and forest products. This interest can be seen in all areas of the food system, from increased demand for local foods in grocery stores, farmers' markets, farm stands, and restaurants, to the establishment of local Agricultural Commissions by municipal governments. Agricultural Commissions are working with local Planning Boards to enable backyard farming and promote commercial farms. Residents and visitors are asking for food that has been produced locally for a wide variety of reasons including health and wellness, support for local farmers,

and increasing the amount of food produced in the state to stabilize supply. The ice storms of 2008 and 2010 revealed that at any given time New Hampshire has only a three day supply of food on hand. UNH Cooperative Extension estimates that 3-4% of food consumed in New Hampshire comes from local sources.

New Hampshire's working landscape of farms and forests represent a viable, dynamic industry integrated within New Hampshire's communities. These operations offer diverse products and services to local, regional, national, and international markets. Farmland and forestland owners are stewards of nearly a half million acres in the state, representing a major influence on the region's character and quality of life.

The NH Timberland Owners Association estimates that the state is losing working forestland at a rate of 18,000 acres per year. The forest products industry is New Hampshire's third largest industry, employing over 10,000 people and providing over $1.5 billion in revenue annually. In the REDC region, the amount of forested land continues to decrease as forest is cleared for residential and commercial development.

New Hampshire has retained its third-in-the-nation ranking as a state committed to locally sourced food. The annual Locavore Index conducted by the Vermont based Strolling of the Heifers organization looks at a number of factors including number of farmers'

markets, Community Supported Agriculture operations (CSAs), food hubs, and active farm to school programs, all compared on a per capita basis. This year, data on dollar volume of direct to the consumer sales was also included. Vermont ranked 1st, Maine was 2nd, Oregon was 4th, and Massachusetts was 5th.

Farmers' markets are well established and celebrated in the REDC region year round, thanks to two organizations, Seacoast Growers Association and Seacoast Eat Local. In 2014, the Seacoast Growers Association managed farmers' markets in four seacoast towns – Portsmouth, Exeter, Dover, and Durham. The weekly markets run from May to October and feature locally grown food and locally made crafts from 128 vendors and 17 community nonprofit organizations. Seacoast Eat Local manages winter farmers' markets in Exeter and Rollinsford. The Seacoast Eat Local website provides a link to resources for local food, including markets, farmstands, and restaurants:
www.seacoasteatlocal.org/find-local-food/

Farmers' markets are also held in several other communities in the region, including Salem, Hampton Falls, Nottingham, Raymond, Epping, Newmarket, Deerfield, Atkinson, and Hampstead. An updated list of markets in the region is available on the Seacoast Eat Local website:
http://www.seacoasteatlocal.org/seacoastharvest/index.php?page=farmersmarkets.

Community Supported Agriculture, Commonly referred to as CSAs, is an opportunity for customers to develop a close relationship with an individual farm while gaining a share in the farm's harvest. The REDC region includes almost two dozen CSA farms that may provide shares of meat, fruit, vegetables, dairy, eggs, oils, bread, maple syrup, and plant seedlings. A list of farms providing CSA share in the region in 2014 is available on the Seacoast Eat Local website:
http://seacoasteatlocal.org/find-local-food/csas/

- According to the 2012 Census of Agriculture data, the number of farms in the state increased 5% from the 2007 Census, to a total of 4,391 farms.

- New Hampshire ranks 1st in the nation in direct sales of farm and forest products to consumers; 23% of New Hampshire farms sell directly to consumers versus 6% of farms nationally.

- Agriculture provides 11,606 jobs in New Hampshire and contributes $43.8 million in tax revenue.

- The market value of agricultural and forestry products sold in Hillsborough County increased 32% from 2007 to 2012, from $17M to $23M. The market value of products sold in Rockingham County decreased 29% in the same period, from $26M to $18M.

- In the REDC region, Hillsborough County ranks 37th ($3,706,000) and Rockingham County ranks 38th ($3,685,000) out of 3,130 counties in the U.S. in the value of direct market sales.

- New Hampshire ranks 3rd in the nation in the percentage of total market value of agricultural sales from direct sales to consumers.

- Agricultural acreage in Hillsborough County in 2012 was 47,707, a 5% decrease from the 50,238 acres in 2007. Agricultural acreage in Rockingham County in 2012 was 36,003, an increase of 7% over the 33,570 acres in 2007.

- The number of farms in the REDC region grew between 2007 and 2012. The number of farms in Hillsborough County increased 12%, from 615 to 668. In Rockingham County, the number of farms increased 11%, from 594 to 658.

The New Hampshire Department of Agriculture, Markets, and Food is an excellent resource for identifying and researching and agriculturally-based economic development opportunities. In addition, the Department's website provides a wide variety of economic and market information on the agriculture and forest resources in the state. For more information:
www.agriculture.nh.gov/index.htm

Natural Hazard Mitigation/ Adaptation Planning

Changes in New Hampshire's climate are well documented in local records of precipitation and temperature, sea level, and growing seasons. Mitigating the impacts of natural hazards such as floods, storm surges, and extreme temperatures and adapting to new climatic conditions is a critical economic strategy for the REDC region. Natural hazard mitigation actions can be summarized into four types: local planning and regulations, structure and infrastructure projects, natural systems protection, and education and awareness programs. The Federal Emergency Management Agency (FEMA) requires every municipality in the United States to have a Natural Hazard Mitigation Plan. Plans must

be updated every five years and identify the type of natural hazards impacting the community, such as floods, sea level rise, and severe winter weather. Plans must also identify critical infrastructure vulnerable to storms and plans to prevent and mitigate damage.

Adaptation planning involves responding to the impacts of climate change, both proactively and reactively. Adaptation planning can include preventative measures to slow down the progression of climate change and mitigation measures to reduce the effects. Coastal municipalities in the REDC region are on the front lines of adaptation planning. The goal of adaptation planning is to provide municipalities, businesses and residents with the information needed to:

- Enhance preparedness and raise awareness of weather related risks such as flooding and storm surge.
- Identify costs-effective measures to protect and adapt to changing conditions.
- Improve resiliency of infrastructure, buildings, and other investments.
- Protect life, property, and local economies.
- Protect services that natural systems such as salt marshes and undeveloped land provide, such as flood storage and storm surge protection.
- Preserve unique community character.

As a coastal state, New Hampshire's economy and quality of life have historically been linked to its shores, ports and harbors, and its vast expanses of productive saltmarshes and sandy beaches. Accounting for changes in sea level that may be expected to occur over the lifetime of infrastructure will lead to informed decisions for public and private investments by minimizing risk and the potential for damage. In addition, the many rivers flowing through the REDC region are being impacted by changes in storm frequency and intensity. Increases in flooding and erosion are being experienced in many communities, resulting in increased spending on road maintenance and construction, employee and contractor labor costs, and damage to private homes and businesses and municipal infrastructure.

There are several projects and programs taking place in the REDC region and across NH designed to assist municipal and business leaders with adaptation planning. Examples include:

- With funding from FEMA, the Rockingham Planning Commission and the NH Coastal Adaptation Workgroup are working with the communities of Seabrook, Hampton Falls, Hampton, North Hampton, Rye, New Castle, and Portsmouth on a project entitled, "From Tides to Storms". The purpose of the project is to help these communities prepare for sea level rise and storm surge by assessing their risk and vulnerability. The project will be completed in 2015 and will provide each town with a specific vulnerability assessment, maps, and data, all designed to summarize the impacts of climate change on land, natural resources, and infrastructure based on projects of future seal level rise and storm surge.

- Residents and municipal officials from the town of Exeter are working with a team from the University of New Hampshire and the Great Bay National Estuarine Research Reserve on a two year project, called a Climate Adaption Plan for Exeter (CAPE). The team will help Exeter create a flexible, science-based plan to address the intensifying impacts of stormwater runoff, flooding, sea level rise, nonpoint source pollution and habitat change in the context of a changing climate. Funds for the project were provided by the National Estuarine Research Reserve Science Collaborative. The plan will be completed in 2015.

- The NH Coastal Adaptation Workgroup (NHCAW) is a collaboration of 19 organizations working to help communities in New Hampshire's seacoast area prepare for the effects of extreme weather events and other effects of long-term climate change. Through workshops and meetings, NHCAW helps communities learn about and utilize existing resources and locate additional assistance to better prepare for climate effects. In April 2014, NHCAW organized the Coastal NH Climate Summit, a day-long collaborative forum among scientists, natural resource agencies, municipal leaders, watershed organization, and concerned citizens. The goal of the Climate Summit is to inform participants of current local climate change research and adaptation planning efforts, identify needs and gaps in current knowledge, and foster collaboration in the region.

- The New Hampshire Climate Change Action Plan was prepared by the NH Department of Environmental Services (DES) and the NH Climate Change Task Force in 2009. The Action Plan presents 67 recommendations designed to benefit the economy, increase state and regional energy security, and improve environmental quality. Recommendations include reducing emissions from buildings, electric generation, and transportation; protecting natural resources to maintain the amount

of carbon sequestered, and; adapting to existing and potential climate change impacts.
http://des.nh.gov/organization/divisions/air/tsb/tps/climate/action_plan/documents/nhcap_final.pdf

- The Adaptation Toolkit for NH Communities was developed by NHDES to guide NH communities through a logical planning process. The toolkit includes information on assessment, education and outreach, planning and implementation, and funding resources. http://des.nh.gov/organization/divisions/air/tsb/tps/climate/toolkit/adaptation.htm

Recent extreme weather events have led to a growing appreciation for the need for municipalities, residents, institutions, and businesses to plan for and adapt to changes in climate. Extreme precipitation events, flooding, and warmer temperatures are the "new normal", affecting local economies, infrastructure, public health, and natural resources.

MS4 Permitting

Stormwater runoff from roads, parking lots, and lawns is a leading cause of water pollution in the REDC region. Rain and snowmelt running off the land and discharging from drainage pipes carries pollutants that can result in the destruction of fish, wildlife, and aquatic life habitats; a loss in aesthetic value; and threats to public health

Stormwater sign, Stratham, NH.

due to contaminated food, drinking water supplies, and recreational waterways. According to EPA, 83% of the surface water quality impairments in NH are primarily due to stormwater runoff.

Mandated by Congress under the Clean Water Act, the National Pollutant Discharge Elimination System (NPDES) Stormwater Program is a comprehensive two-phased national program for addressing the non-agricultural sources of stormwater discharges which adversely affect the quality of our nation's waters. The program uses the NPDES permitting mechanism to require the implementation of controls designed to prevent harmful pollutants from being washed by stormwater runoff into local water bodies. The regulated entities must obtain coverage under an NPDES stormwater permit and implement stormwater pollution prevention plans (SWPPPs) or stormwater management programs (both using best management practices (BMPs)) that effectively reduce or prevent the discharge of pollutants into receiving waters. In NH, municipalities, institutions, and industries must work with EPA Region One to meet permit requirements.

In the REDC region, many municipalities are required by EPA to comply with the NPDES Stormwater Program. EPA is promulgating new rules that will require even more municipalities to comply. It is anticipated that the rules, called the Phase II Rule, will be enacted in the coming year and will require additional communities to meet MS4 permit requirements. MS4 is the term used to identify a Municipal Separate Storm Sewer System. EPA defines MS4 as, "a publicly owned conveyance or system of conveyances from ditches, curbs or underground pipes that divert stormwater into the surface waters of the state." In the REDC region, there are a number of organizations working with municipalities and institutions to prepare for MS4 permit requirements, including the regional planning commissions, NH Department of Environmental Services, the Southeast Watershed Alliance, the Piscataqua Region Estuaries Partnership, and the University of New Hampshire Stormwater Center.

NH Fisheries

The NH Fishing Industry will complete its fifth year of the new fisheries management plan fiscal year 2014 (June 2014 – May 2015) at the end of May. In 2010 the Northeast Marine Fisheries Service (NMFS)

implemented Amendment 16 to the Northeast Multispecies Fisheries Management Plan (FMP). This system included a harvesting strategy to stay under any specific Total Allowable Catch (TAC) imposed by the government for each fish stock. Prior to the start of the FY 2013 fishing year, the initial allocations for all sector members (across all sectors throughout New England) were dramatically reduced. The TAC was reduced on all key ground fish stock by up to 80% on some stocks. The TAC for Gulf of Maine (GOM) Atlantic Cod, arguably the region's most important commercial fish species,

was reduced 78%. GOM Cod is a critical species for New Hampshire's fleet of inshore fishermen, because 1) it is a highly popular fish in the marketplace, which results in high market prices, and 2) it is a widely distributed species in our nearshore waters as a result of feeding behavior and its natural spawning areas. This later point is important because even though GOM Cod stocks have declined dramatically, it is still present and very hard for NH fishermen to avoid. Our important commercial groundfish species in the Gulf of Maine include Cod, Haddock, Yellowtail Flounder, Pollock, American Plaice, Gray Sole, Redfish, and Hake. These fish species often swim together. As a result, NH Fishermen, who typical fish with trawler nets or gills nets, routinely catch a mix of these species. A fisherman is required to manage his catch of each species and should he catch over his limit on any one species he is forced to stop fishing for all species. While some stocks are strong, (among them Haddock, which is actually increasing,) if fishermen are limited in their catch of cod and cannot avoid them, it limits their ability to catch other groundfish stocks.
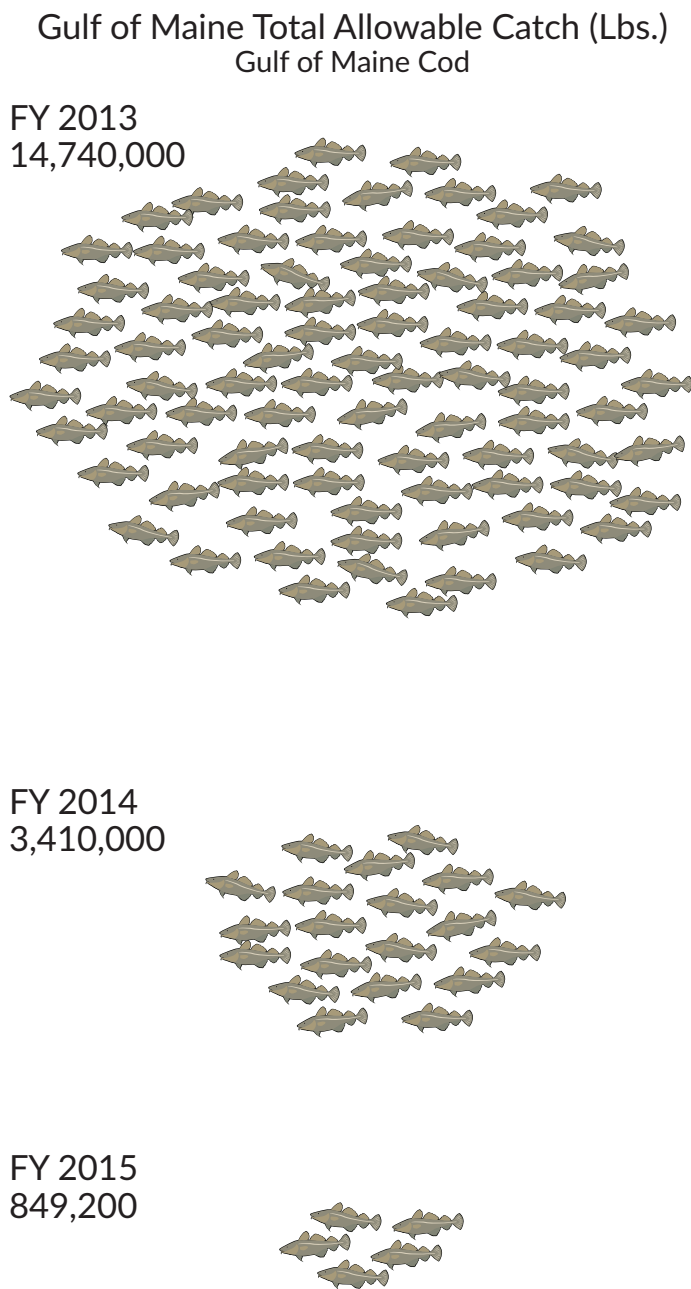
NMFS Interim Emergency Management Act
In mid-2014 new NMFS scientific data was published suggesting that the Cod stock was in an even worse state than had previously been predicted. As a result of this data and an inability of the New England Fisheries Management Counsel to agree on drastic corrective action, in November of 2014 the NMFS imposed an Interim Emergency Management Act that effectively closed the groundfish fishery for NH fishermen for the next six months, because it closed near shore fishing areas and it required maximum daily catch limits of 200 pounds for the couple of boats capable of fishing in offshore waters outside of Jeffries Ledge. This action further reduced the TAC for Cod by another 75% after the 80% reduction of the previous year. While the Allowable Catch Entitlement (ACE) of all groundfish species for the NH Fishing Sector has not been finalized for FY 2015, the Manager of the Yankee Fishermen's Cooperative reports that the ACE for Cod will be 53,000 pounds for the entire sector. To put this in perspective, individual boats caught over 60,000 in FY 2014 and over 200,000 in FY 2013.

Recently the New England Fisheries Management Counsel did approve Framework 53. This rule sets fishing years 2015–2017 catch limits for several groundfish stocks, modifies management measures for GOM Cod, and adopts other measures to improve the management of the groundfish fishery. The result of all

Gulf of Maine Total Allowable Catch (Lbs.)
Gulf of Maine Cod

FY 2013
14,740,000

FY 2014
3,410,000

FY 2015
849,200

New Hampshire Groundfish Disaster Relief Fund
Allocation of Grant Fund of $1,136,400

$22,728

$180,000

$278,418

$334,000

$267,254

$54,000

- NHF&G
- For-Hire Industry
- Active Commercial Vessel
- InActive Commercial Vessel
- NH Shoreside Infrastructure
- Fishing Sector Permit Bank
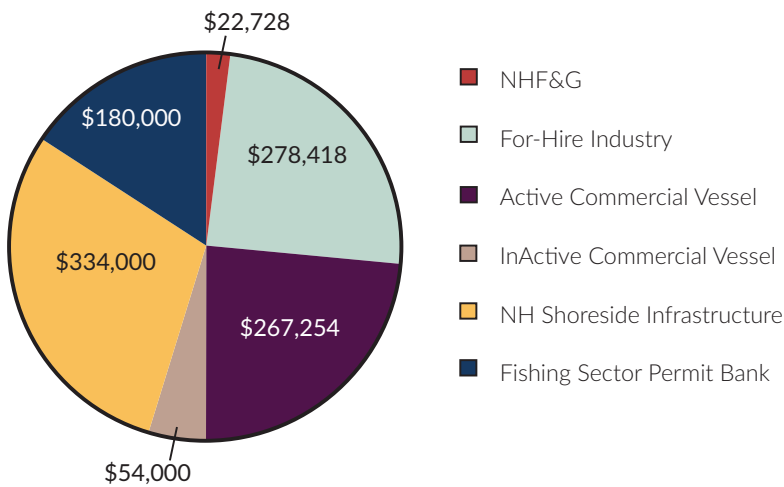
People/Permit Holders
Receiving Disaster Relief Funds

20 For-Hire

65 Active Crew

9 Inactive Permit Holders

8 Shoreside

Source: NH Fish & Game

of the measures has been that the NH fishing fleet has reduced from 24 active boats in 2013 to 14 in 2014. Members of the fishing fleet predict that only seven to nine boats will fish in 2015.

Natural Disaster Declaration
As reported in the 2014 CEDS, the U.S. Department of Commerce declared the New England groundfish industry a natural disaster in 2013, and congress allocated $32 million to help assuage some of the economic loss to fishermen and communities. There were long delays in allocating these funds from the federal government because of very different views amongst New England states about how to spend this money. Eventually it was determined that funds would be granted to individual states to determine how best to allocate the funds to impacted fishermen and fishing related business in their area. In New Hampshire, the Department of Fish and Game was granted the funds and tasked with developing a distribution plan. NH F&G held numerous meetings with members of the NH For-Hire Groundfish Industry (recreational) and Commercial Groundfish Industry, including fishing

permit (boat) owners, both active and inactive, as well as crew and shoreside industry operators. NH F&G recently released their final plan and the highlights can be viewed in the graphics above.

New Hampshire Community Seafood
New Community Seafood's (NHCS) Community Supported Fishery (CSF) successfully completed its second year of operation. This program continues to buy all fish from NH fishermen and offer a price above market and introduces consumers to a broader variety of fish, including hake, dogfish, skate, and whiting. NHCS met its goal to double members and revenues and expand the total areas of distribution further into the state. It held three 8-week seasons and had over 500 members in its strongest second season. It expanded to 17 drop off sites around the state and added a restaurant member program. NHCS is just commencing its first season of 2015 and the new manager reports active signups at this time.

Cultural and Recreational Amenities

The REDC region encompasses a wide variety of wonderful cultural and recreational amenities. Nationally acclaimed theater and musical venues, first-class dining, museums, coastal beaches and harbors, lakes, rivers, fishing, hunting, sailing, historic sites of all kinds, farmers' and craft markets, and tax-free shopping. These amenities are a primary attraction for visitors to southern New Hampshire and are a vital component of the high quality of life that continues to attract people, business, and industry.

The REDC region includes the state's entire Atlantic Ocean coastline. This 18 mile coast is the focus of water-based recreational opportunities including boating, fishing, swimming, and surfing. Easy access to the seacoast from southern New England and Canada has resulted in an influx of seasonal residents in the region's coastal communities. Although mid-summer population figures are not available, it has been estimated that coastal populations double during the summer months for tourist-oriented communities in the region like Hampton and Seabrook beaches. Great Bay estuary, often referred to as New Hampshire's hidden coast, also provides fishing and boating opportunities.

The interior portion of the REDC region also attracts visitors with many inland rivers, lakes, and ponds. There are numerous campsites along the shore of all these water bodies, as well as public access for swimming, boating and fishing. Pawtuckaway State Park and Kingston Lake are particularly popular freshwater lakes in the region.

The Scenic and Cultural Byways program was enabled by the NH Legislature in 1992 to provide residents and visitors to travel a system of byways which feature scenic and cultural amenities and support the recreational and historical attributes found along the way. The REDC region is host to three Scenic and Cultural Byways: the Coastal Byway, which features state parks, beaches,

Open Mic Night at Able Ebenezer Brewery, Merrimack, NH.

There are 75 New Hampshire State Park properties. The NH park system includes beaches, campgrounds, historic sites, waysides, natural areas, a multitude of trails, which include 1,000 miles of wheeled off-highway recreational vehicle trails, over 300 miles of state owned rail-trails, and 7,422 miles of snowmobile trails.

Kayakers enjoying the Squamscott River, Exeter, NH.

ocean views, historic sites, and harbors; the Independence Byway, featuring the state's first European settlements; and, the Appleway, highlighting agricultural heritage.

The NH Division of Parks and Recreation and NH Office of Energy and Planning are responsible for developing the Statewide Comprehensive Outdoor Recreation Plan (SCORP). The most recent SCORP was released in January 2013 and provides a strategic vision through 2018. The plan includes the following vision statement, "Outdoor recreation in New Hampshire serves diverse populations throughout the state, has a strong, positive impact on the economy, and improves the quality of life for New Hampshire residents and visitors. Strong partnerships among community organizations, the business community, and the public sector facilitate diverse outdoor recreation opportunities for a variety of users." The plan estimates that outdoor recreation supports 53,000 jobs in New Hampshire, generates $261M in annual state tax revenue, and produces nearly $4B annually in retail sales and services.
http://www.nhstateparks.org/uploads/pdf/NH-SCORP_2013-2018_Exec-Overview.pdf

Almost every community in the REDC region is home to historic homes and buildings that are open for public viewing, either on a regular schedule or by appointment. These buildings are prized for their link to the region's rich and varied colonial history and are preserved by town historic commissions as well as local and regional heritage organizations. Strawbery Banke Museum in Portsmouth encompasses over 20 buildings, providing visitors with the opportunity to experience and imagine how people have lived and worked in Portsmouth for nearly four centuries. Historic New England, a regional heritage organization, preserves and presents the cultural and architectural heritage of New England. Historic New England is the steward of four homes in the REDC region: the Rundlet-May House, Gov. John Langdon House, and Jackson House, all in Portsmouth, and the Gilman Garrison House in Exeter. All the homes provide an understanding of how their owners lived and worked from the early 1700's and beyond.

Annual festival and celebrations of all kinds are held throughout the year in the region. Celebrations of local food include chowder festivals, fish and lobster festivals, chili festivals, and strawberry and apple festivals. Hampton Beach is home to an annual sand sculpture contest, featuring 200 tons of sand, master sand sculptors from all over the world and $15,000 in prize awards. The winter holiday season highlights candlelight strolls, vintage Christmas displays, and First Night celebrations in many communities.

The Regional Economy

by Chancellor Ross Gittell, NH Community College System

with contributing author Scott Lemos, UNH Economics PhD student

New Hampshire Overview

The New Hampshire economy has now recovered all the jobs lost in the Great Recession of 2008-2009. In this recovery, however, after several decades in which New Hampshire led New England in job growth, the state lagged behind Massachusetts and Vermont in job recovery and growth and also grew at rate below the U.S. average. New Hampshire in 2014 continued its relatively slow growth, adding employment at a lower rate than the New England and national average.

Figure 1 highlights how far New Hampshire, New England, and the nation have come in regaining the jobs lost during the recent recession. The chart shows that NH and the REDC region fared relatively well during the recession, suffering a lower percentage decline in employment than the national average.[1] But NH and the REDC region have had lower growth than the U.S. and New England since the end of the recession.

Similar to the nation and New England, New Hampshire regained all of the jobs lost during the great recession in 2014. New Hampshire regained all

Figure 1: Change in Total Employment- Index
(Each Region's Peak = 100) [2]

Total Employment Growth (Index)
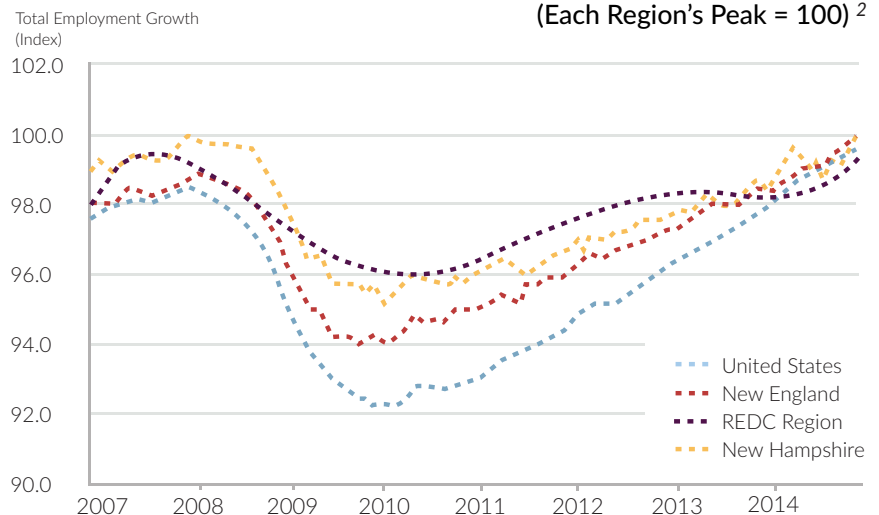
Source: U.S. Bureau of Labor Statistics

Figure 2: Change in Employment

Employment Growth Index (Jan 2007=100)

- New Hampshire Total
- New Hampshire Private Sector
- NH Public Sector
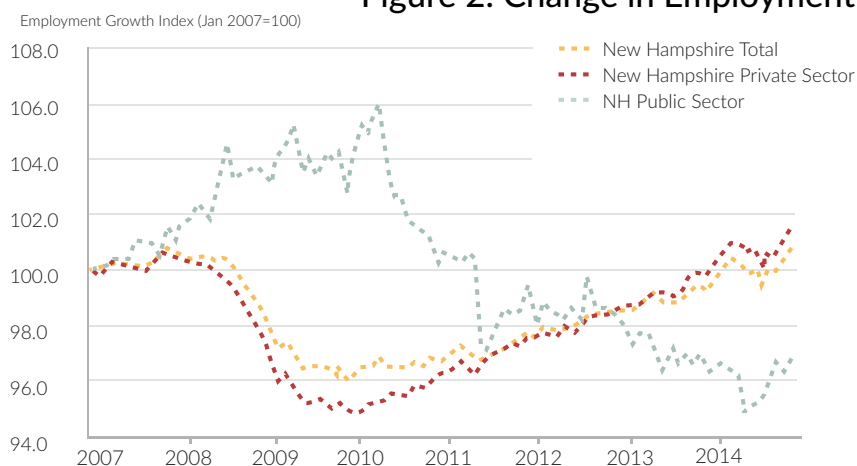
Source: U.S. Bureau of Labor Statistics

of the private sector jobs lost during the recession in 2013, but declines in government employment offset some of those gains. The end of the funding from the American Recovery and Reinvestment Act resulted in declines in government employment in the state while the private sector recovered jobs. Through 2014, increases in private sector employment (7,600 jobs) were offset by decreases in public sector employment (-500 jobs), contributing to overall state employment growth of 7,100 jobs, or 1.1%, see Figure 2.

[1] In Figures 1 and 3 the REDC region is defined as the combined Rockingham and Hillsborough counties in NH. This is done to include the most current data available. Seasonally unadjusted data has been smoothed using polynomial smoothing.

[2] Seasonally-adjusted data was not available for REDC region because of a change in BLS methodology. REDC region data was smoothed using a sixth order polynomial smoothing function.

As Figure 3 below shows, in New Hampshire the largest gain in private sector employment (1,500 jobs) over the past year was in retail trade, growing at 1.6% for the year. Following closely behind retail trade was health care and social assistance (1,400) which grew 1.6% over the year, administrative support and waste management (1,000) growing 3.1% over the year, and finally construction services (900 jobs), which, in percentage terms grew the most of all industry sectors in New Hampshire, growing 3.9% over 2014.

Figure 3: Year-Over-Year Private Sector Job Growth – 2014

Industry	Jobs
Retail Trade	6,300
Construction	3,100
Health Care and Social Assistance	2,000
Admin and Support and Waste	1,800
Transportation and Warehousing	1,600
Educational Services	1,300
Accommodation and Food Services	1,200
Manufacturing	900
Professional, Scientific, and Technical Services	500
Other Services	500
Financial Activities	400
Wholesale Trade	300
Management of Companies and Enterprises	100
Arts, Entertainment, and Recreation	-100
Information	-200

Source: NH Department of Employment Security, Economic & Labor Market Information Bureau

Figure 4: Unemployment Rate 2007-2014[3]

As Figure 4 to the right shows, New Hampshire and the REDC region have continued to have unemployment rates well below the national and regional averages. Over the past decade, the unemployment rate in New Hampshire and the region has consistently been 1 to 2 percentage points below the U.S. and New England levels. In February 2015, the unemployment rate in New Hampshire declined to a seasonally-adjusted rate of 3.9%, as the state and the REDC region continue approaching their pre-recession rates.

Unemployment Rate (%)

- United States
- New England
- REDC Region
- New Hampshire

Source: U.S. Bureau of Labor Statistics
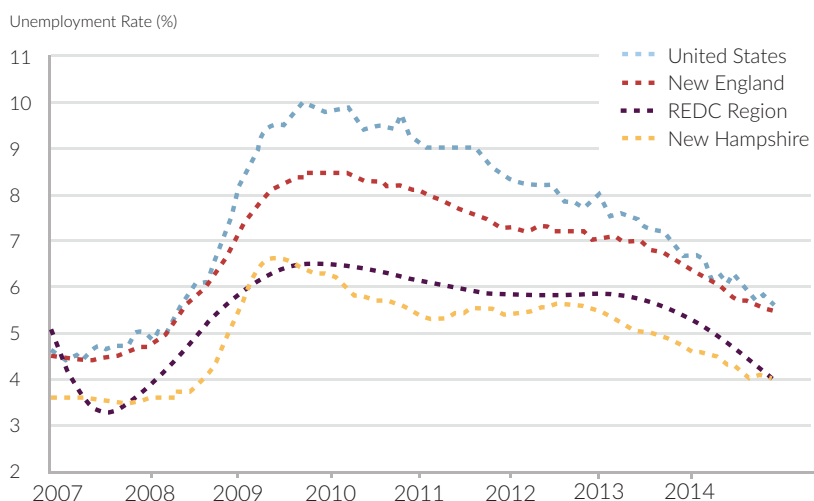
[3] *Seasonally-adjusted data was not available for REDC region because of a change in BLS methodology. REDC region data was smoothed using a sixth order polynomial smoothing function.*

Figure 5: Average Weekly New Unemployment Insurance Claims & Year-over-Year Job Growth in NH

Average Weekly Unemployment Claims

- - - Average Weekly Unemployment Claims
- - - Employment Growth

Employment Growth (%)
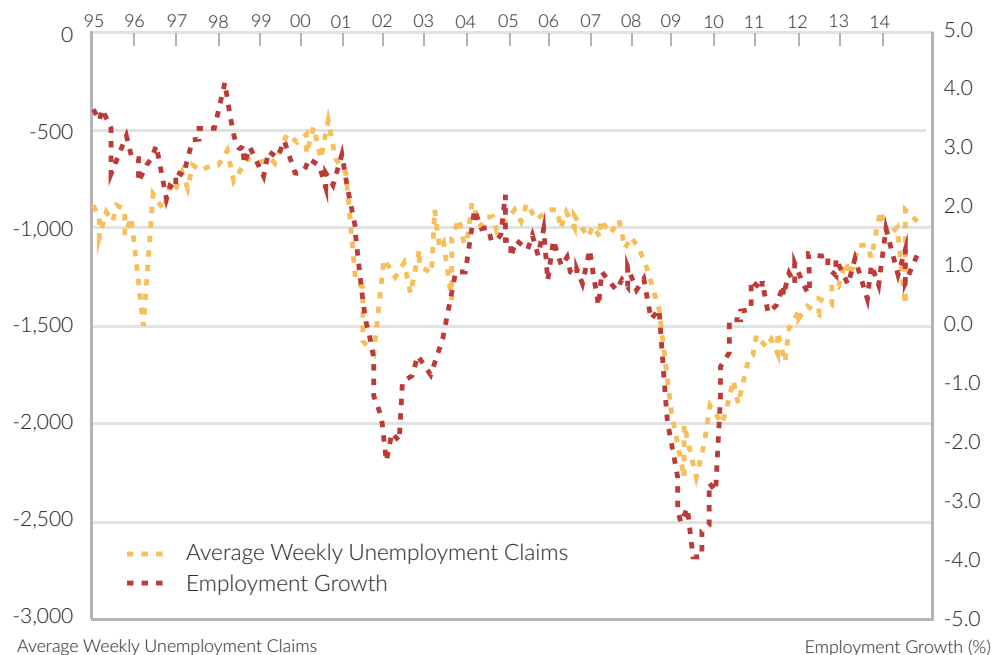
Source: U.S. Bureau of Labor Statistics & The Federal Reserve Bank of Boston Economic Indicators

Key Indicators Suggest Stronger Growth in New Hampshire

There are a number of indicators that suggest New Hampshire's economy is strengthening and will see stronger job growth for 2015. Initial claims for unemployment compensation insurance continue to decline. Figure 5 below shows how strong the relationship is between the rate of job growth in New Hampshire and the average weekly claims for unemployment insurance. In this chart, new claims for unemployment are inverted (a decrease in new claims is indicated by a line that is rising and an increase by a line that is falling), to make the relationship between the two variables more apparent. Historically, initial claims below 1,000 per week for more than a month or two have been associated with periods of stronger job growth, and New Hampshire is now just at that threshold and heading downward.

Leading Index Points to Stronger NH Growth

The Federal Reserve Bank of Philadelphia produces a leading economic index for each of the 50 states. Each state's leading index is designed to predict the strength of the state's economy six months later. The indexes are calculated

and reported by the Philadelphia Federal Reserve Bank on a monthly basis. As Figure 6 shows, there is a strong relationship between the value of the NH Leading Index and the annualized rate of employment growth in the state six months later. The 2014 Philadelphia Fed indexes suggest that New Hampshire will have the third highest improvement among all 50 states, noting future improvements in housing permits and initial unemployment insurance claims.

Figure 6: Philadelphia Federal Reserve NH Leading Index
(3 Mos. Moving Average)

Leading Index

- - - NH Leading Index
- - - Employment Growth

Employment Growth (%)
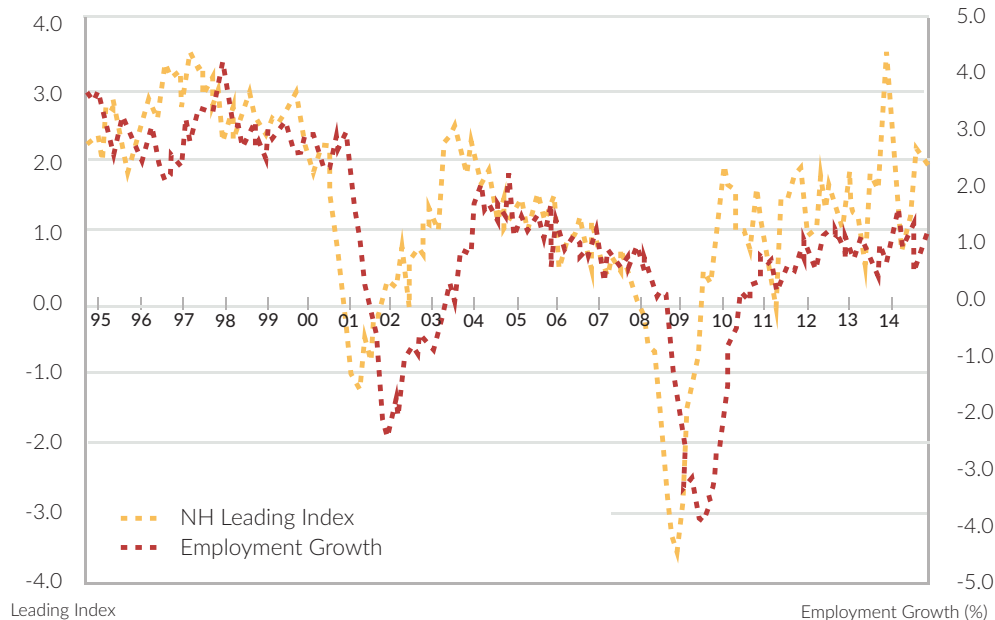
Source: U.S. Bureau of Labor Statistics & The Federal ReserveBank of Philadelphia - State Leading Indexes

The U.S. and New Hampshire Forecast

A September 2014 forecast by Moody's Analytics expects the U.S. economy to grow overall (Gross National Product) by 3.5% in 2015 and 3.3% in 2016. Employment growth nationally is expected to increase to 2.4% in 2015 and 2016. While also increasing, New Hampshire's employment growth is expected to remain below the U.S. average in both 2015 and 2016, at 2.0% and 2.1% respectively. After several years of job growth below the New England regional average, however, New Hampshire is forecasted to have employment growth above the average for New England as some core industry employers add jobs in the state.

Table 1: NH Gross State Product and Employment Growth Forecast (% Change)

		2013	2014	2015f	2016f	2017f	2018f
Gross Product	U.S.	2.2	2.1	3.5	3.3	2.7	2.1
	NE	1.6	1.7	2.9	2.7	2.5	2.2
	NH	0.9	1.5	3.2	2.6	1.9	1.8
Employment Growth	U.S.	1.7	1.8	2.4	2.4	1.3	0.5
	NE	1.1	1.3	1.5	1.7	1.1	0.4
	NH	0.9	1.5	2.0	2.1	1.3	0.5

Source: Moody's Analytics-U.S. Macro Forecast & Regional Forecast, Sept. 2014. "f" represents Moody's full-year forecast.

REDC Area Economy

Growth Stronger in the REDC Region than in New Hampshire

There are substantial differences in growth rates in regions across the state. The REDC region, comprised of Rockingham County and five communities in Hillsborough County, has experienced a stronger recovery and job growth than New Hampshire over the past several years.

The most recent data available for covered (by unemployment insurance) employment by town and county in New Hampshire is for the third quarter of 2014 (annual data for 2014 will not be available until June 2015). Thus some of the recent strength in job growth that is apparent in the current monthly statewide data will not be captured by the town level data required to aggregate employment in the REDC region and its three subregions.

Figure 7: Private Sector Job Growth

Source: NH Department of Employment Security, Economic & Labor Market Information Bureau, Quarterly Employment & Wages.   *2014 includes up through Q3, the most up to date data available.

Figure 7 highlights important private sector job growth trends in the REDC region. The region has experienced stronger job growth than NH for the five year period for which data is available. After experiencing much stronger growth than NH overall, however, the REDC region is trending toward job growth that more closely matches state-wide growth.

Table 2: REDC Region Industry Clusters (% of Total Employment in Region)

Industry Cluster	REDC Region	New Hampshire	REDC as % of Total NH Employment
Biomedical/Biotechnical (Life Sciences)	10.6%	11.0%	50.9%
Business & Financial Services	9.7%	8.6%	59.9%
Advanced Materials	7.0%	5.4%	68.6%
Information Technology & Telecommunications	6.9%	5.0%	72.2%
Manufacturing Supercluster	6.8%	5.6%	64.9%
Defense & Security	5.4%	4.8%	60.2%
Energy (Fossil & Renewable)	3.6%	3.4%	56.3%
Arts, Entertainment, Recreation & Vistor Industries	3.0%	3.7%	42.7%
Education & Knowledge Creation	2.3%	4.5%	27.4%
Transportation & Logistics	1.9%	1.6%	62.6%
Chemicals & Chemical Based Products	1.8%	1.5%	65.0%
Printing & Publishing	1.2%	1.3%	49.5%
Apparel & Textiles	0.7%	0.7%	55.7%
Agribusiness, Food Processing & Technology	0.7%	0.6%	56.6%
Forest & Wood Products	0.6%	0.8%	40.0%
Glass & Ceramics	0.3%	0.2%	74.8%
Mining	0.1%	0.1%	35.9%

Table 3: REDC Region Industry Clusters (Location Quotient)

Industry Cluster	REDC Region	New Hampshire
Advanced Materials	2.15	1.66
Manufacturing Supercluster	1.82	1.49
Information Technology & Telecommunications	1.79	1.31
Glass & Ceramics	1.48	1.04
Education & Knowledge Creation	1.48	1.19
Arts, Entertainment, & Recreation	1.45	0.94
Chemicals & Chemical Based Products	1.28	1.04
Apparel & Textiles	1.1	1.38
Forest & Wood Products	0.99	0.86
Energy (Fossil & Renewable)	0.97	0.75
Business & Financial Services	0.8	0.97
Transportation & Logistics	0.79	0.54
Printing & Publishing	0.65	0.84
Mining	0.64	0.62
Agribusiness, Food Processing & Technology	0.62	0.27
Biomedical/Biotechnical (Life Sciences)	0.42	1.01
Defense & Security	0.29	0.87

REDC Region[4] Clusters

Industry cluster data is available on a countywide basis and not town-by-town, therefore for the purposes of this analysis, the REDC region is defined as the combination of Rockingham and Hillsborough Counties. The 2013 CEDS update highlighted the major industry clusters in Rockingham County in 2010, according to the Innovation in America's Regions tool developed by U.S. EDA. Table 2 below shows employment (percent of total employment in region) in each industry cluster for 2012, the most current cluster data available.

The REDC region accounts for about 53% of the total employment in New Hampshire and accounts for over 50% of the total NH employment in 12of the 17 clusters presented above. The region accounts for 58% of total New Hampshire employment among the top three clusters in the state: Biomedical, Business and Financial Services, and Advanced Materials .

4 For the purposes of Cluster Analysis, the REDC region is defined as the combination of Rockingham and Hillsborough Counties.

Table 3 also updates the location quotients (LQs) for 2012 in both the REDC region and New Hampshire overall. Location quotients are used to assess the relative concentration of an industry in a region compared to the concentration of employment in the same industry in a reference region (the nation for this analysis). Location quotients higher than 1.0 in a region indicate that an industry's employment is more concentrated (as a share of the region's total employment) in the REDC region than it is in the nation. The table highlights eight clusters in Rockingham that are substantially above the national employment average, those being Advanced Materials, Manufacturing, IT, Glass and Ceramics, Education, Arts and Entertainment, Chemicals, and Textiles.

Visioning the REDC Region and NH Economic Advantage and Looking Forward

New Hampshire is economically advantaged on a number of important measures, including high per capita income (8th of the 50 states, 2014), low unemployment (7th lowest in January 2015) and the lowest poverty rate in the nation. Supporting a strong economy is a highly educated workforce (6th highest in percent of working age adults with associates degree or higher) and strong technology sector concentration (with NH ranking 7th in concentration of employment in technology and science jobs). As a subsection of the state, the REDC region is a leader in the state in the economic performance measures and "economic advantage" factors.

There are signs, however, of decline in the New Hampshire and REDC area economic performance and advantages. New Hampshire and the region have experienced slower growth in employment coming out of the most recent recession than the U.S. average and other New England states. In addition, the state and the region have experienced declines in employment concentration in technology-based industry. And of strong concern is the aging workforce with significant numbers of highly educated residents reaching retirement

age. Specifically, the age cohort of 55-64 year olds represents roughly 13.5% of the total New Hampshire population, whereas the young adult "replacement" cohort, those aged 25-34 are smaller in number, about 10.9% of the state population, and are not as highly educated.

Looking forward, it will be critical for the NH and REDC region to support and sustain its key economic advantage factors to retain a strong economy.

The "People" (Skilled Workforce) Advantage

In terms of people, New Hampshire possesses a high skilled and well educated workforce, which is increasingly considered the most important factor in economic advantage. Human capital is the key factor in economic performance and average income levels for regions (Florida, 2013, http://www.citylab.com/work/2013/01/does-human-capital-tend-cluster-center-cities-or-suburbs/3245/) . For cities and regions, highly educated people are: the source of skilled workers; the entrepreneurs starting up new companies; and the innovators of new products and services that help to differentiate areas and produce productivity gains, economic growth and competitiveness. And, an available "talent/people pool" is an important "magnet" for firms in areas and firms considering moving to an area

Figure 8 shows the strong correlation between education

Figure 8: Per Capita Income and % Working Age with Associate's Degree by State
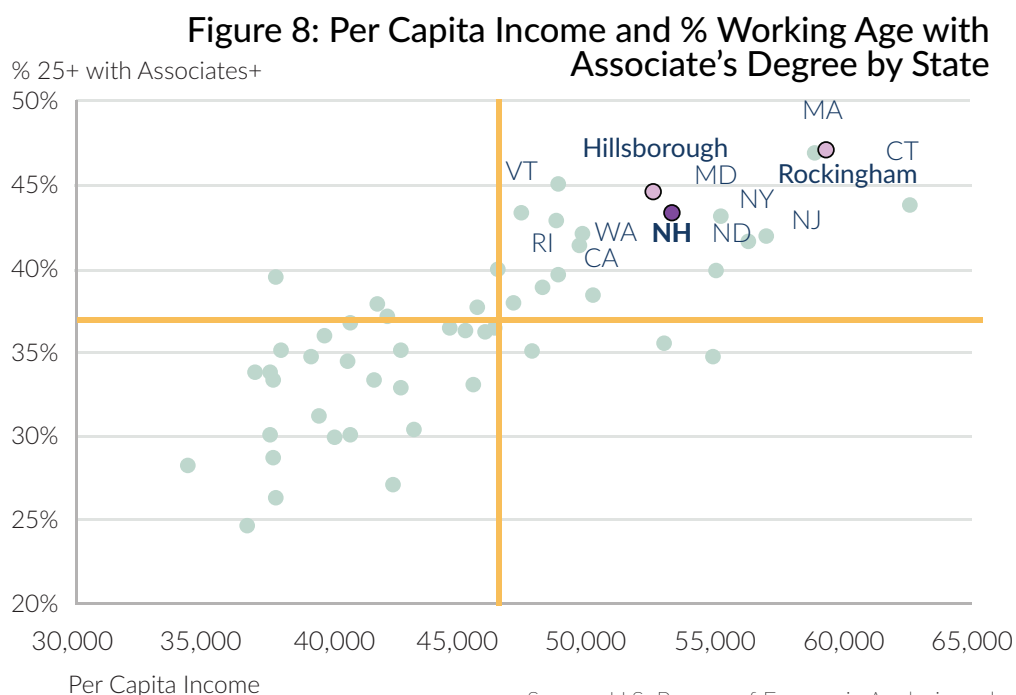
Source: U.S. Bureau of Economic Analysis and U.S. Census Bureau, American Community Survey

of the workforce (percent of working age adults with associates degree or higher) and per capita income. The gold lines represent the U.S. average for either measure, and the upper right quadrant represents states and counties that are above the U.S. average in both per capita income and percentage working age with associate's degree. NH ranks among the small number of states in the highly desired upper right hand quadrant – with Massachusetts and other leading states – of educational attainment and high income.

Figure 9: Percent of Resident Population Born Out-of-State by Community, Region, and State

Source: U.S. Census Bureau, 2010

Rockingham and Hillsborough counties are the two most heavily populated counties in the state and of the four NH counties that are part of Boston metropolitan area. Both counties are officially part of the Boston metro area as defined by the U.S. Census Bureau based on commuting patterns and economic connections. Both counties and metro NH have educational attainment and income higher than the state average and comparable to Massachusetts.

The "people advantage" in NH (and in an even more pronounced manner in the REDC region) developed between 1980 and the mid-2000s, as new residents, many of whom were members of the baby boom generation (born between 1946 and 1964), were attracted to New Hampshire because of the high quality of life and low costs relative to places they were migrating from, including Massachusetts, Connecticut, New York, and New Jersey. For the domestic in-migrants, New Hampshire was a great place to raise a family. It is recreationally advantaged between the mountains and ocean and was attractive because of a low crime rate, a high quality health care state, and because of many cultural and historical amenities. Further, and for some most importantly, it was the only state besides Alaska without a broad-based income or sales tax. This is particularly important when recruiting new businesses to the state; business with heavy FF&E expense can greatly benefit from lack of sales tax. Companies having server farms or high tech manufacturing equipment needs can

realize significant savings by purchasing in tax free NH. For the economy and high tech industry, baby boomers moving to New Hampshire were well timed to the transformation of the economy from industrial to knowledge- and innovation-based. Many of the in-migrants were recent college graduates and they helped to transform the NH economy. By 2000, nearly three-fourths of adults in NH with at least a bachelor's degree had been born in another state.

As the young recently educated moved into New Hampshire with advanced education and the latest technology skills and training, they led the innovation and growth in the state. The REDC region, once again, led the state in domestic in-migration, with some communities having as high as 60 percent of residents born in another state, see Figure 9.

But what was a source of advantage – NH's human capital -- is increasingly an area of concern. An available pool of skilled workers, particularly young skilled workers, is important to retain and grow employment. The population and, more importantly for the economic future, the workforce in NH and the REDC region are aging and domestic in-migration can no longer be the source of the state's and REDC region's highly educated workforce. In NH, from 2000 to 2010, the population between ages 25 to 44 declined 15%, and in the REDC region the cohort declined over 20%. The scale has tipped from young adult, entry level skilled worker concentration towards retirement age concentration. Figure 10 shows that in the REDC region from 1990

to 2010, the ratio of young adults (25 to 44) to those 65 and over went from 4.3 to 2.0 and is on a trajectory to decline to 1.3 by 2020, going from over 50% above the national average in 1990 average to 20% below the U.S. (on current trajectory in 2020).

The current center of technology growth in New England -- the Boston/Cambridge area -- contrasts sharply in demographic trends with NH and the REDC region. The Boston/Cambridge area has retained a very high 25-44 to 65+ cohort ratio from 1990 to 2010 and importantly has experienced an improvement relative to the U.S. average. The high number of young adults has contributed to the continued technology-based strength in the Boston/Cambridge area as growing and start-up technology companies tend to concentrate in areas with a strong pool of young talent . This was the case with REDC region in the 1990s but is no longer as much the case.

And unlike the last decades of the 20th century, domestic in-migration cannot be relied on to supply an available skilled workforce. The net gain from migration into New Hampshire was 74,000 from 1985 to 1990. Between 1990 and 1998, New Hampshire had net gains of 19,000 in domestic migration. As recently as 2004, New Hampshire experienced net migration of over 7,000. The in-migration was concentrated in the REDC area. But since 2008, NH annual net in-migration has been below 1,000 with four years of negative net

in-migration. And according to New England Economic Partnership forecasts, in-migration is not expected to exceed 1,000 in any year in the forecast up through 2018.

Adding to the concern about the decline in the "people advantage" is the relatively low rate of increase in educational attainment of the population. Nationwide from 2008 to 2012, the percentage of American adults with an associate degree or higher increased by 1.5 percent, while NH's percentage increased by less than half that. The main factor in this is that the baby-boomers who moved to the state in the 1970s, 1980s, and 1990s are beginning to retire. The changes in in-migration indicate that the state is in need of a different approach to ensure a highly educated workforce. To keep pace with the educational attainment increases nationally, the entry level workforce in NH has to exceed the educational attainment level of the population retiring from the workforce and this is not the case currently in NH.

To ensure that the REDC area retains its "economic magnet" of an available pool of skilled workers, the pipeline of young adults entering the workforce must be highly educated with skills aligned with employers' needs.. The rate of higher education attainment for all young adults nationwide was higher than for all adults, at 40.9%. **While the NH percentage of young adults with higher education achievement is higher than the U.S. average, it is below the rate of higher educational attainment of older adults in NH and this does not bode well for the future.**

One pertinent issue requiring attention is the very high percentage of NH high school graduates going to college out of state. 43% of NH high school graduates go out of state to college, the second highest rate in the nation. Only Vermont has a higher percentage of students going to college out of state, and Vermont is facing similar demographic challenges as New Hampshire. Driving students out of state are the low levels of public support for higher education that lead to

Figure 10: Ratio of Population Aged 25-44 : 65+

Ratio 25-44 : 65+
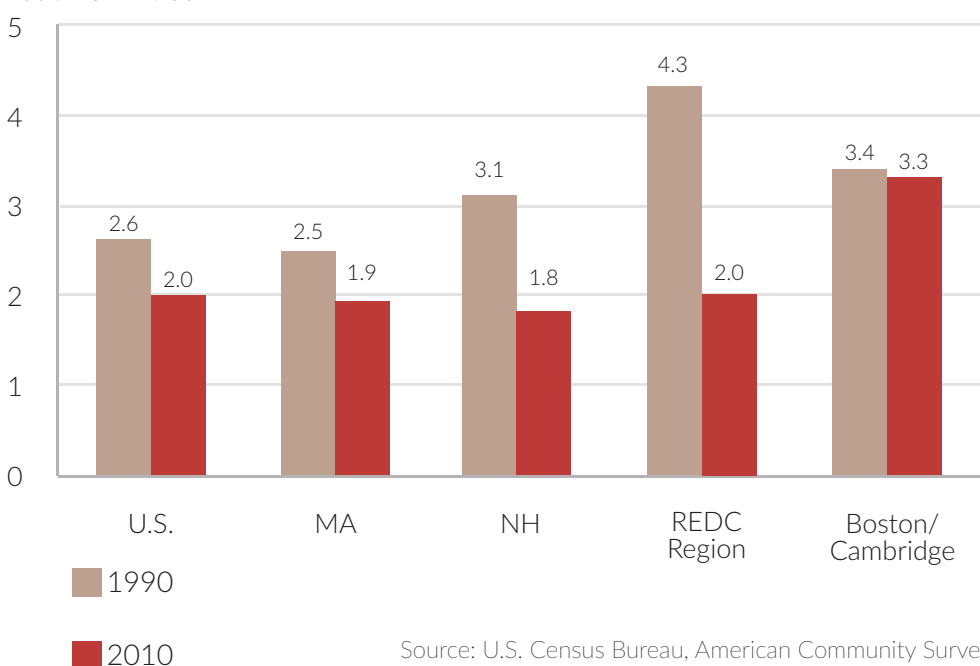
Source: U.S. Census Bureau, American Community Survey

high in-state tuition costs for public higher education in both states. The state has the highest average public college tuition in the country. NH provides the lowest level of per capita support for higher education in the nation and the resulting high in-state public higher education tuition results in migration out of the state by many of the state's best and brightest. Going to college out of state makes it less likely that the highest achieving youth graduating from NH high schools will be part of a high-skilled workforce in the state when they complete college. To ensure a pool of skilled workers, the state and REDC region have to retain more of the local high school graduates going to college.

The need to replenish the supply of skilled workers as baby boomers retire is made more challenging by the fact that the pipeline from secondary education is also in decline. The prominent baby boom generation peaked in births of children in the early 1990s and most of their children are now well beyond secondary school. With this, NH's K-12 school enrollment has been declining and the NH graduating class is expected to decline by 20% in the next 20 years for both NH and the REDC region. This heightens the importance of having high percentages of high school graduates in NH go on to college here in NH, helping to ensure that the state retains its strong position in the education of its workforce.

Clusters

The second main source of the REDC region's economic advantage is the industry base in the area. The advantage and value of these clusters include a large skilled labor pool with skills closely tied to cluster needs, as well as shared infrastructure and resources.

These clusters can justify investment in education and training, technological infrastructure, and transportation that support the clusters and have significant returns on investment. The clusters also foster innovation, in that their close proximity to each other heightens competition and cooperation, which drives innovation. The technology cluster in the REDC area is part of the world class Greater Boston area technology cluster.

The technology cluster in NH and REDC region is being challenged by increasing competition from other states and countries. High tech employment in NH is lower than it was in the early 1990s. Further, New Hampshire has been steadily dropping in high tech concentration since the mid-1990s, when it ranked 9th in 2010 compared to 4th in 1995. During the technology bust

in the early 2000s, New Hampshire had the highest percentage decline of technology employment.

Now that the nation and state are coming out of the recession and starting to grow at rates more typical of post-recessions, growth in technology and related employment is being challenged by the limited supply of skilled labor available in NH and the REDC region. There are three main contributing factors for this. One, the unemployment rates in NH and Rockingham are 25% below the national average; Two, the most highly educated and populated age cohort in NH and region is reaching retirement age, Three, there are indications that the education of many young adults and older adults is out of alignment with the economy, particularly with regards to technology-based and applied skills.

These challenges could be "flipped" into an opportunity to turn a relatively strong regional economy, into one among New England's -leading regional economies. The REDC region has an opportunity to better align both the emerging and the incumbent workforce with the workforce that technology-based and related industries seek   and use this to achieve a stronger economy. Steps required to do this would include confronting the people challenge by ensuring an affordable and easily accessed pathway for youth from secondary to post-secondary to careers within the region particularly in high demand STEM fields, and strengthening, through investments in transportation infrastructure, existing high value-added clusters shared with nearby Boston/Cambridge area.

Looking Forward: The Future is Now

Looking forward, the REDC region has a strong base to build upon its people and cluster advantages. The region is in a better position than most other areas both in the state and nationally. The focus needs to change, however, from importing skilled workers to enhancing the education of the resident population, both school-aged and adults seeking to enhance their labor market standing. Each and every young person and incumbent worker is a valuable economic resource, and they need to be treated as such.

REDC should focus on strengthening the connection between K-12 and post-secondary education to employers' needs and the area's economy. This is important for the economy, the competitiveness of New Hampshire industries, and for New Hampshire students and workers. The focus should be on STEM fields, which are critical for economic advantage to

support high tech, advanced manufacturing, and other high value-added and well-paying industries with concentrations in REDC area.

In terms of the cluster advantage, looking forward, New Hampshire possesses a strong cluster foundation and should look to build on its strengths. In the seacoast and along Highway 101, the strong growing clusters include advanced composite materials, digital media and advertising, biotech, and internet services and mobile app development/ support. In the I-93 corridor, the strong clusters include advanced manufacturing, defense, and information technology industries.

Relatively low costs are a part of the New Hampshire and REDC advantage, where relatively is an important word. The REDC region needs to try to maintain a lower tax rate and other costs compared to other ortheast and high tech states, though this does not mean New Hampshire or the REDC region have to have the lowest costs. In addition, transportation and technology infrastructure investments should be made that support clusters and strengthen the economic advantage of proximity to Boston/Cambridge. These should focus on making it lower cost and easier to connect to the world-class Boston/Cambridge/Route 128 technology cluster to the south.

The REDC region has a strong economic foundation to act and build on. The appropriate public and private focus and investment can help to maintain the region's economic advantages and support a strong economic future.

Workforce Development

"We have a strong base, but we need to change our focus from importing workers to training our own."
- Ross Gittell, Community College System of NH

New Hampshire Division of Economic Development
Annual Report - July 1, 2013 to June 30, 2014

The Division of Economic Development offers a variety of programs to support the growth of New Hampshire companies and to facilitate the relocation of new companies into the state. Their programs collectively had the following impact on New Hampshire's economy during the fiscal year ending June 30, 2014:

- $483 million in earnings for New Hampshire workers.
- $3.6 million in Business Enterprise Tax revenue.

Supported the creation and retention of

8,260 jobs

Business Retention

Their business resource specialists cultivate relationships with New Hampshire companies and communities. Their specialists serve as trusted partners who guide clients to programs and services that address their needs or help them find the right partners in state and federal government that will move a project forward.

- 650 business & community visits.

42 Rapid Response Sessions

for 530 workers experiencing a reduction in force

Business Recruitment

Their recruitment team focuses on developing long-term relationships with real estate brokers, site consultants, and decision makers of companies in the U.S. and Canada that may have an interest in locating their business in New Hampshire.

- 1,200 new jobs.
- 1.8 million square feet of real estate.
- $130 million in new capital expenditures.
- $4.6 million in local and state property tax revenues.

Facilitated 17
company relocations or expansions

International Commerce

Their experienced team assists New Hampshire businesses, both seasoned exporters and those new to exporting, in becoming more competitive in the global marketplace.

- Trained 140 people in 11 export-related sessions.
- Provided one-on-one counseling to 78 companies.
- Facilitated overseas business development activity for 11 companies (Singapore Air Show & trade mission to Turkey).
- $4.5 million in new international sales obtained by 13 of the companies we assisted.

Trained 140
people in 11 export-related sessions

Statistics are for all of New Hampshire.

Government Procurement Assistance

Their trained experts provide critical technical support for New Hampshire businesses in their efforts to secure and deliver on government contracts.

- Delivered 1,900 one-on-one counseling sessions to 572 companies.
- 44 training & outreach events with 1,185 participants $650 million in government contracts obtained by 115 of our clients.

$650 Million
in government contracts obtained
by 115 of our clients

Tax Credits

They administer the Economic Revitalization Zones (ERZ) program and the Coos County Job Creation Tax Credit (CCJC), and they report on the Research & Development Tax Credit (R&D).

- 16 applicants requested $1.5 million in ERZ tax credits.
- The program is capped at $825,000, so applicants received a proportional share of credits.
- 166 businesses requested over $6.3 million in R&D tax credits. The program is capped at $2 million, so applicants received a proportional share of credits.

23 Businesses Awarded

Tax Credit $$$$

$86,000 in CCJC tax credits

Job Training

They provide 1:1 matching grants to New Hampshire companies to promote investment in skills development for New Hampshire's workforce.

- 56 companies awarded a total of $897,362.
- 3,090 workers trained in new skills.

The Office of Workforce Opportunity administers $8 million in federal Workforce Investment Act funds, which are used to provide reemployment services, and include on-the-job training, tuition reimbursement, and other supports through the NHWorks system to keep our workforce competitive.

Broadband

Their broadband program provides technical assistance to businesses with questions about broadband and coordinates state and local telecommunications policy planning initiatives.

- 20 outreach events to educate state and local officials on broadband related issues.

21 Technical Assistance Projects

FY 2014 Job Training Grants by Industry Sector

$33,494 $31,551 $18,113
$34,949
$187,423
$591,832

- Manufacturing
- Sales
- Construction
- Professional Services
- Non-profits
- Transportation & Distribution
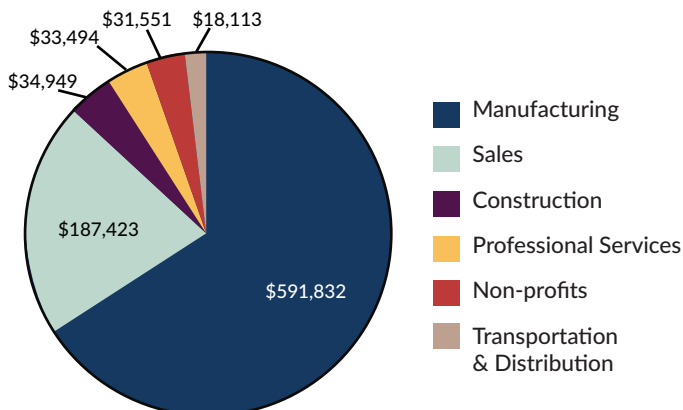
Funding Key Partners

The Division of Economic Development provides funding or in-kind match totaling over $750,000 for NH Small Business Development Center, NH Innovation Research Center, and NH Manufacturing Extension Partnership.

$750,000
in funding or in-kind match

Statistics are for all of New Hampshire.

Small Business Development Center

The NH Small Business Development Center (SBDC) is an outreach program of UNH's Paul College of Business & Economics and a partnership program with the U.S. Small Business Association (SBA), UNH, the state of NH, and the private sector. SBDC provides confidential business management consulting and educational programs to more than 3,000 New Hampshire small businesses each year.

The NH SBDC has full time, certified business advisors providing one-on-one, long-term, management consulting to small businesses.

31 Years
NH SBDC has advised businesses

Target Market: NH companies who have the intent to grow and contribute to the NH economy.

SBDC E-Learning 24/7:
9,700 courses taken, 230+ NH communities, 47 U.S. states, 28 countries, and six continents.

Rich Grogan
State Director for the NH Small Business Development Center

8,100
Businesses Created

4,400
Jobs Created

$202.5 Million
Capital Raised in the Last Decade

In 2014
6,990 hours were spent assisting **949** small business clients in NH.

After 5 Years
80% of SBDC-counseled businesses are still in business.

44% Survival rate of non-assisted businesses.

SBDC CY 2014 Assistance in NH	
Clients	949
Jobs Created	204
Jobs Retained	44
Business Starts	76
Employees	3,155
Client Annual Sales	$361,582,008
Total Capital Formation	$22,473,213

SBDC Assistance in REDC Communities	
Clients	144
Jobs Created	36
Jobs Retained	23
Business Starts	14
Employees	850
Client Annual Sales	$201,291,283
Total Capital Formation	$2,533,300

University of New Hampshire

The University of New Hampshire (UNH) promotes economic development and business innovation through many programs and services offered statewide. Programs and services include:

- UNHInnovation – Advocates for, manages, and promotes UNH's intellectual property; promotes partnerships between UNH and the business community; and is responsible for licensing UNH technologies and creating start-up companies based on innovations created at the university. UNHInnovation also hosts the Interoperability Laboratory and the NH Innovation Research Center. www.innovation.unh.edu

- Alpha Loft – Incubates and accelerates startup and early-stage companies in New Hampshire, creating an entrepreneurial culture of growing companies. Offers co-working locations in Durham, Portsmouth, and Manchester, and provides high value programming, events, advice, and mentoring, improving entrepreneurs prospects for successfully launching and scaling innovation-based businesses. www.alphaloft.org

- NH Social Venture Innovation Challenge – Engages aspiring and practicing student and community social entrepreneurs across New Hampshire in designing novel, sustainable, business-oriented solutions to pressing social and environmental challenges. The Challenge is an idea-stage competition with the goal of inspiring innovative, solution-orientated thinking and providing a forum to shine a light on these ideas. Challenge winners receive awards that help bring needed resources to advance these promising models. http://www.unh.edu/socialbusiness/nh-social-venture-innovation-challenge

- UNH Cooperative Extension (UNHCE) - Provides New Hampshire citizens with research-based education and information, enhancing their ability to make informed decisions that strengthen youth, families, and communities, sustain natural resources, and improve the economy. Community and Economic Development staff works with local communities to enhance skills and broaden knowledge on decision-making, engaging the public, creating a vision for the future, improving the economy, and developing leadership. http://extension.unh.edu/resources/category/Economic_Development

Community College System

The Community College System of NH (CCSNH) is a consortium of the seven community colleges located around the state. The schools include Great Bay CC (GBCC) in Portsmouth, Lakes Region CC (LRCC) in Laconia, Manchester CC (MCC) in Manchester, NHTI—Concord's Community College (NHTI) in Concord, Nashua CC (NCC) in Nashua, River Valley CC (RVCC) in Claremont, and White Mountain CC (WMCC) in Berlin. Both GBCC and NCC reside within the REDC region. For more information about CCSNH, visit their website at www.ccsnh.edu.

Great Bay Community College, Portsmouth, NH.

Great Bay Community College
With its main campus located at the Pease Tradeport in Portsmouth, GBCC provides accessible, student-centered, quality higher education programs for a diverse population of students seeking career, degree, or transfer opportunities. Great Bay Community College is a two-year public accredited institution, with additional accreditations in its Business, Nursing, Surgical Technology, and Veterinary Technology Programs.

In addition to its main campus, the Advanced Technology & Academic Center (ATAC) in Rochester, NH, is an extension of Great Bay Community College with a focus on technical, composites manufacturing, and academic courses that serve New England job seekers and business owners. ATAC offers 27,000 square feet of classroom, computer, academic support, and technology laboratories, for a wide array of both credit and non-credit courses. In addition, ATAC provides advanced manufacturing courses, which will fulfill training needs for Albany Engineered Composites

(AEC), Safran Aerospace Composites (SAC), and other area manufacturers.

This past April, Great Bay Community College held its first annual Campus2Campus event at the Portsmouth campus. The program was catered to high school students currently enrolled in career and technical courses at their local high schools or regional technical centers. The 40 high school students and their families who attended were presented a pathway to a certificate or associate degree that started in high school and can end with an industry-ready credential or transition to a four-year institution. They learned about the GBCC's degree and certificate programs as well as student-run clubs and organizations and the new student success center slated to open this fall.

Nashua Community College

NCC is a two year, comprehensive community college located in Nashua, NH. With over 2,200 students, NCC remains committed to the trade programs that built the school while also adapting to the changing needs of its students and surrounding businesses. In the past four years the school has invested $15.4 million in creating programs, which will allow students to receive both technical and academic training in their desired career paths. The majority of the investment has been made possible through grants and fundraising. This has allowed the college to keep tuition low while meeting the demands of 21st century education.

NCC holds specialized accreditations in Automotive Technology and Collision Repair Technology, Aviation Technology, Electronic Engineering Technology, and Nursing, while offering over 30 challenging and unique associate degree programs. NCC is housed in four buildings, containing 31 general classrooms, 25 program-specific classrooms and laboratories, the Learning Commons, the Advising Center, the Wellness Center, the Peterson Library, auditorium/lecture hall, administrative and faculty offices, the Maintenance Department, cafeteria, and bookstore.

WorkReadyNH

WorkReadyNH is a skills development program which addresses gaps in soft skills for work place success. The state of NH launched the WorkReadyNH program in collaboration with New Hampshire's Community Colleges. The program focuses on upgrading skills In Applied Mathematics, Reading for Information, and Locating Information (problem solving). It also addresses the so-called "soft skills" such as workplace behaviors, teamwork, and communications needed in today's work environment. The program is open to unemployed and under-employed New Hampshire residents.

WorkReadyNH helps job-seekers by improving their skills and adding a nationally recognized credential to their resume (The National Career Readiness Certificate (NCRC), from ACT and the WorkReadyNH Certificate from the community college). The program utilizes standardized assessment testing to identify gaps in abilities and adds training to strengthen the weaker areas. Upon successful completion of the program, a job-seeker will earn bronze, silver, gold, or platinum level certification. Each certification level corresponds to a skill set needed for success within a range of specific jobs.

Since the program start in October 2011, the WorkReadyNH program has had 1,822 graduates across the state. The participants have earned the following levels for the National Career Readiness Certificate: Bronze – 344, Silver –1118, Gold – 412, Platinum – 8.

WorkReadyNH is an initiative of the CCSNH, the Office of the Governor, the NH Department of Resources

Students of the WorkReadyNH session held at the REDC Training Center in March 2015.

and Economic Development's (DRED) Office of Workforce Opportunities. When it launched in 2011, WorkReadyNH was offered at the following four NH Community Colleges:

- Great Bay Community College (Portsmouth)
- Manchester Community College
- River Valley Community College (Claremont and Keene)
- White Mountains Community College (Berlin, Conway, Littleton)

With additional Trade Adjustment Assistance Community College and Career Training (TAACCCT) grant funds, the Community College System, program expanded in the spring of 2013 to include:

- Lakes Region Community College (Laconia)
- Nashua Community College
- New Hampshire Technical Institute (Concord)
- Great Bay Community College (Rochester campus)

The program continues to expand, with more employers recognizing the value in the credentials and asking for it in their application process. The program has had companies use the NCRC as a benchmark for current employees to establish training needs throughout the organization and as entrance requirements into apprenticeship programs.

With the success of WorkReadyNH, the Statewide Liaison and Directors have been consulting with groups in Maine and Massachusetts to implement WorkReadyME and WorkReadyMA. Employers across New England are echoing the concerns of NH employers in the skills gap and recognize the value in the soft skills/professional development training.

Pathway to Work

The Pathway To Work initiative is a voluntary program created to assist unemployment claimants start their own businesses. A major benefit of the program is that it allows eligible unemployed claimants to continue to receive their unemployment benefits while working full time to start businesses in New Hampshire. The initiative provides financial support to eligible claimants while they access the resources, information, and training they need to get their businesses off the ground. NH Employment Security (NHES) identifies eligible candidates, provides orientation, and accepts

people into the program. SBDC helps screen applicants to determine if their business ideas are feasible. It then provides entrepreneurial training, business counseling, and technical assistance to participants.

The program was added to New Hampshire's existing program to assist employers and employees in New Hampshire called New Hampshire Working. Created by legislation signed in July 2013, Pathway to Work was added to the New Hampshire Working initiative to assist claimants interested in self-employment assistance.

For more information on Pathway to Work, visit the NHES website at
www.nhes.nh.gov/nhworking/pathwaytowork/
or email the SBDC at Jason.Cannon@unh.edu.

Advanced Manufacturing Partnerships in Education (AMPed)

In the fall of 2011, CCSNH was awarded a $19.9 million grant by the U.S. Department of Labor Employment and Training Administration under the Trade Adjustment Assistance Community College and Career Training Act to develop education, training, and outreach programs that bolster New Hampshire's advanced manufacturing industry.

A new initiative was born, uniting all seven of NH's community colleges, more than 100 advanced manufacturing industry partners and multiple city and state agencies under the umbrella of New Hampshire's Advanced Manufacturing Partnerships in Education (AMPed NH). Over the last few years, they have redefined industry education at the community colleges, which now provide dozens of certificate and degree programs statewide, designed to get students from classrooms to careers with efficiency. Education and training programs run from two-week intensive training "boot camps" to two-year associate degree tracks and are all industry guided and approved. Further, students in updated community college labs use the same types of cutting-edge manufacturing equipment found on professional production floors -in many cases donated by the manufacturers- easing transitions into the workplace.

Workforce Development

As of December 31, 2014, more than 6,650 individuals have been trained under AMPedNH.

Transformed manufacturing programming and industry partnerships are making a lasting impact on New Hampshire's largest industry sector. Students, including Trade Adjustment Assistance (TAA) participants, the unemployed, returning veterans, and other non-traditional learners have reported being better prepared for high-wage, high-skill employment, and success stories are adding up. Scores of students have been hired right out of AMPed NH teaching labs — even before finishing their studies. In some cases, entire class rosters have been hired by AMPed NH industry partners within days of graduation. Advanced manufacturers are now looking to NH's community colleges as reliable recruiting grounds, with presentations, networking events and more continually arranged to connect job seekers with hiring managers.

New in 2014-15

An innovative, interactive web-based career guide was launched in October 2014 that allows participants to take a quick survey of various workplace scenarios and, based upon their answers, to see a list of suggested career paths in advanced manufacturing, along with career-specific information, required skill sets, the community colleges that provide the necessary training, and a link to current manufacturing job postings.

New Programs: The seven NH Community Colleges have also added new advanced manufacturing degrees and certificates over the past year: degrees in Advanced Manufacturing Process Technology and Industrial Design Technology (NHTI); a degree in Advanced Welding (White Mountain CC), and a Robotics certificate (Manchester CC).

New Space: Great Bay CC has expanded into another 10,000 square feet at its Advanced Technology and Academic Center in Rochester, creating space for additional classrooms, academic support and technology laboratories. The now 27,000 square-foot facility offers specialized certificates in advanced composites manufacturing training, as well as a liberal arts curriculum transfer.

REDC Training Center

- Since its opening, REDC has hired an in-house Business Advisor who has counseled over 40 businesses during the past year. In addition to providing business advice, REDC now offers assistance with marketing and design to its clients.

- Since April 2014, REDC has approved 12 loans for a total amount of $1,581,400, helping to bring a total leveraged value of $21,476,166 into Southern NH's economy. REDC helped businesses create 65 new jobs and retain 13 jobs during those months.

- Groups such as the Small Business Development Center (SBDC), Service Corps of Retired Executives (SCORE), NH Department of Resources and Economic Development (DRED), NH Bureau of Vocational Rehabilitation, and various lenders have held meetings and met with clients in our day-office space. REDC hosted WorkReadyNH course, administered by Manchester Community College, providing training to under- and unemployed residents in soft skills and other areas needed to enter the workplace. REDC also hosts its own business development workshops and classes, free of charge.

- REDC held a series of business development workshops and classes in February and March 2015, which were free for attendees. In addition, REDC hosted Manchester Community College, which held a WorkReadyNH session at our training center, graduating 9 students in March 2015. Finally, groups such as the Small Business Administration and SCORE, have advisors who hold office hours using REDC's free, day-use office space.

Advanced Manufacturing Program and Lab Details as of Spring 2014

College	Programs of Study	Program Type(s)	Lab Highlights
GBCC	Advanced Composites Manufacturing (8 concentrations) Computer Numerical Control (CNC) Production Boot Camp Advanced Welding Technical Studies	Certificate *Certificate Certificate Associate Degree	At GBCC's Applied Technology and Academic Center (ATAC) in Rochester: 5-axis CNC machine and simulators, resin transfer molding equipment, 3-D loom, 3-D printer, clean room, autoclave, CMM. In 2015, added 10,000 SF, creating a total of 27,000 SF for classroom, computer, academic support, and technology laboratories.
LRCC	Advanced Manufacturing Electromechanical Technician	Cert. and Assoc. Associate Degree	Fully updated shop and classroom space; CNC milling machines (tabletop and full size) and simulators; hydraulics, pneumatics, robotics, and electronic training equipment.
MCC	Computer Aided Design Mechatronics Robotics Welding Technology Electrical Technology Advanced Manufacturing Technology	Certificate Certificate Certificate Cert. and Assoc. Cert. and Assoc. Associate Degree	Welding training equipment; electrical training equipment; robotics/mechatronics training lab simulating production from conceptualization to shipping; 3-D printer.
NCC	Computer Numerical Control Machine Tool Technology CNC Programming Mechanical Design Technology Electronic Engineering Technology Precision Machining	Certificate Certificate Associate Degree Associate Degree Associate Degree	Fully updated shop and classroom space mirroring true job shops; CNC simulators, Star Swiss lathe, 3-D printers, multi axis CNC machines.
NHTI	Advanced Manufacturing Processes Computer Tech. Programming Electronic Technology Manufacturing Engineering Technology Mechanical Engineering Technology Computer Engineering Technology Robotics and Automation Engineering Technology Electronic Engineering Technology Advanced Manufacturing Process Technology Industrial Design Technology	Certificate Certificate Certificate Associate Degree Associate Degree Associate Degree Associate Degree Associate Degree Associate Degree Associate Degree Associate Degree	Updated lab grand opening October 2013; Robotics and Automation Engineering training equipment; CNC simulation and training equipment; measuring equipment.
RVCC	Advanced Machine Tool Technology CNC Boot Camp NIMS CNC Machinist	Certificate *Certificate *Certificate	Fully updated lab; CNC simulators and training equipment; metrology tools; new computing equipment; 3-D printer.
WMCC	Pipe Welding Precision Welding Advanced Welding	Certificate Certificate Cert. and Assoc.	Fully updated lab; new extraction system, 25 workstations, virtual welding units, training equipment for multiple types of welding; mobile welding lab operational.
All colleges	WorkReadyNH	Certificate	

*Noncredit certificate

For more information about NH's Community Colleges, WorkReadyNH, and AMPedNH, visit ccsnh.edu and click on the appropriate links.

Workforce Development

In 2012, REDC compiled a comprehensive list of technical and trade training programs available in and around southern New Hampshire, focusing our research primarily on trade programs such as electrical, plumbing, HVAC, welding, machinery, advanced machinery/CNC, and other like programs. As part of the 2015 CEDS process, REDC reviewed the most current data and updated it as appropriate. In addition to those programs on the map, two schools in the Boston, MA area, the Wentworth Institute of Technology (www.wit.edu/continuinged/programs/workforce-training.html) and the Benjamin Franklin Institute of Technology (www.bfit.edu), offer a wide array of programs and classes.

1 NHTI Concord's Community College
www.nhti.edu
Advanced Manufacturing Processes,
Computer Aided Design (CAD),
Electronic Technology, WorkReadyNH

1 IBEW Local Union 490
www.ibew490.org
State Approved Electrical
Apprenticeship Program

2 NH Plumbers & Pipefitters UA Local 131
www.ualu131.org/
Plumbing Apprenticeship Program

3 NH School of Mechanical Trades
www.tnhsmt.com
State Sponsored Electrical
& Plumbing Apprenticeship

3 Manchester Community College
www.mccnh.edu
Advanced Manufacturing Technology,
Construction Technology, Electrical
Technology, CAD, WorkReadyNH

3 Manchester School of Technology
www.mst.mansd.org
State Sponsored Electrical
& Plumbing Programs

4 Tenet Electrical School
www.tenet-ed.com
Electrical Apprenticeship
and Code Update Course
Work

5 Nashua Community College
www.nashuacc.edu/
Electronic Engineering Technology,
Machine Tool Technology, CNC,
WorkReadyNH

5 Visible Edge
www.visible-edge.com
Machine Design, Pipe Design

Granite State Trade School 6
www.granitestatetradeschool.com
Gas, Plumbing Continuing
Education Coursework, Gas Licensing

**Great Bay Community College - Advanced 7
Technology & Academic Center**
www.greatbay.edu/about/atac
Advanced Manufacturing, CNC

Dover High School 8
DHS.journeyman@dover.k12.nh.us
State Sponsored Electric
& Plumbing Programs

Portsmouth Naval Shipyard 9
www.usajobs.gov
Heat Metal, Welding, Machinist,
Electronics, HVAC, CNC,
Fabrication &
Apprenticeship Jobs

**Great Bay Community College - 9
Portsmouth**
www.greatbay.edu/
Welding Techology, WorkReadyNH

Intercoast Career Institute 10
www.intercoast.edu
State Sponsored Electrical Apprenticeship

Wilbur H. Palmer Vocational-Technical Center 11
jdube@alvirnehs.org or cnoonan@alvirnehs.org
State Sponsored Electrical Program

Rochester
Concord
Dover
Hooksett
Portsmouth
Manchester
Raymond
Bedford
Salem
Hudson
Nashua

STEM Education

(Science, Technology, Engineering, and Mathematics)

As part of her efforts to help students develop the skills and critical thinking needed for success in the innovation economy, Governor Maggie Hassan issued an Executive Order in April 2014 creating the Governor's Task Force on STEM Education. The Task Force issued its final report in January 2015, with recommendations aimed at enhancing education and pathways in science, technology, engineering and math in New Hampshire schools.

The report, entitled "Pathways to STEM Excellence: Inspiring Students, Empowering Teachers and Raising Standards," outlines eight recommendations along with implementation strategies for each. The strategies are designed so that educators can focus on local approaches that are aligned with each district's priorities, resources, and existing educational initiatives while incorporating business and higher education as partners.

In a press release issued by the her office, Gov. Hassan said "Modernizing how we educate our students in the STEM fields of science, technology, engineering and math is critical to helping them develop the skills needed for good jobs in the innovation economy, and I thank the members of the task force for their important work.

"Developed with input from leaders throughout the education and business communities, the task force recommendations outline how our schools and students can be competitive in the 21st century economy. This report will help us strengthen the foundations of STEM education, inspire our students through competitions and more hands-on experiences, and empower our teachers. By bringing our standards into the 21st century, we can ensure that our students are prepared to compete for jobs in today's global economy."

The press release notes that the report recommendations are grouped in three areas: Strengthening STEM Foundations; Inspiring Students; and Empowering Teachers and these areas include:

- Creating more opportunities for hands-on learning experience in science courses ;

- Encouraging "Personal Learning Plans" that enable students as early as middle school to progress on a STEM educational and career pathway;

- Expanding curriculum options to include coding and other pathways that enhance students' STEM mastery and broaden career possibilities;

- Creating "early college" programs and academies to support excellence in student STEM attainment at advanced levels;

- Increasing the availability of competitions and capstone experiences for students;

- Engaging and mentoring girls for STEM careers;

- Increasing STEM proficiency of teachers and developing resources for teachers to enhance the transmission of STEM learning; and

- Supporting teachers' efforts to embed STEM learning from the earliest grades in a variety of curriculum.

The final report is available to the public: www.governor.nh.gov/commissions-task-forces/stem/index.htm.

Best Practices for Workforce Attraction/Retention

Aligning the Talent Pool with Employer Needs – The Workforce Development Department of the Green River Area Development District (GRADD) in Owensboro, Kentucky provides employers with qualified employees to improve the economic stability of the region. GRADD has identified six industry sectors as high demand occupations : energy, advanced manufacturing, health care, transportation, finance, and scientific. Sector strategies are regional, industry-focused approaches to building skilled workforces that result in job opportunities for all workers across a range of industries, and result in education and training investments that are directly responsive to specific needs of employers in the region. Because they bring workforce development, economic development, higher education and other partners together, sector strategies result in more efficient use of public resources.
www.gradd.com/WD/

Goals and Objectives

CEDS Visioning Session, Portsmouth NH.

Public Participation
Authored by Consensus Building Institute

Background

The CEDS planning and drafting process involves broad based community consultation and dialogue. As part of the 2015 planning process, REDC held four public visioning sessions in March 2015. The sessions had three broad purposes:

• Provide a forum for a diverse group of individuals interested in regional economic development to meet, share ideas, and learn from each other;

• Provide participants an opportunity to learn from a local economic development expert; and

• Gain insight from the public and local stakeholders on regional strengths and weaknesses, and the goals and objectives the region should pursue over the next five years to further regional economic development.

Each event was open to the public, featured a keynote speaker, and involved a facilitated discussion to gather public input.   REDC also created an online survey to solicit additional input.

The Consensus Building Institute (CBI) provided facilitation services at each of the four visioning sessions. CBI is a not-for-profit 501(c)(3) organization based in Cambridge, MA, which provides facilitation and mediation services to help public, private, and non-governmental organizations nationally and internationally reach agreement on complex public policy matters. The CBI facilitation team consisted of Carri Hulet, Senior Associate, and Toby Berkman, Associate.

CBI drafted a Final Report summarizing the public and municipal input from the visioning sessions and the online survey. Although the report provides some basic background on the sequence and agenda of each meeting, it is not intended to serve as a precise play-by-play of exactly what transpired during the four sessions. Rather, the report seeks to pull out and identify the key themes that emerged from the meetings as a whole, and provide recommendations to REDC as they formulate the updated CEDS.

Overview of the Sessions

The four visioning sessions took place at different locations in southern New Hampshire, but each followed a similar format. First, Laurel Bistany, President of REDC, welcomed participants and introduced them to the purposes of the visioning sessions and the CEDS. Next, a keynote speaker provided expert background on economic development challenges and opportunities in southern New Hampshire, and addressed questions from participants.

Carri Hulet then led the group in a facilitated conversation around adjusting or improving the CEDS goals. In each meeting, the facilitated conversation involved a combination of full group discussions and small group breakouts organized by theme or development goal.

The meetings attracted a range of participants from diverse backgrounds, including federal, state, and municipal government officials and employees, students, business representatives, and private citizens. The dates and locations of the sessions were as follows:

• March 3, 9am, City Hall Auditorium, Nashua

• March 5, 5pm, Grill 28, Portsmouth

• March 12, 9am, REDC Training Center, Raymond

• March 17, 5pm, Tuscan Kitchen, Salem

The Guest Speaker Presentations
Dennis Delay, economist at the New Hampshire Center for Public Policy Studies, was the guest speaker at

the March 3 meeting in Nashua. Mr. Delay focused his presentation on the long-term economic and demographic trends in southern New Hampshire. He highlighted the region's rapid economic growth, which has lasted for close to a generation due to migration of workers from other states. He noted that migration has slowed, but the region continues to have high projected economic growth due to the presence of fast growing companies and industries.

Despite these positive historical trends, Delay suggested that demographic shifts in southern New Hampshire will likely hinder growth moving forward. Migration is projected to continue to lag, while the age of the workforce will increase. Delay argued that the region is unlikely to experience both high projected economic growth and an aging workforce. One of the two projections will be wrong, he suggested.

Ross Gittell, Chancellor of the Community College System of New Hampshire, spoke at the March 5 meeting in Portsmouth and the March 12 meeting in Raymond. In both meetings, Gittell discussed the historical sources of the so-called "New Hampshire advantage," which had led to strong economic growth over the last thirty years.

Gittell suggested that the "New Hampshire advantage" had been built on two pillars: "people" and business "clusters." The "people" advantage emerged as highly skilled, educated workers migrated to southern New Hampshire attracted by its proximity to Boston, its quality of life, and its relatively low cost of living. Meanwhile, the "clusters" advantage came about as world-class companies were attracted by the region's skilled labor pool, its low taxes, and its business-friendly climate.

Gittell suggested that both sources of the "New Hampshire advantage" are currently in decline. The region faces decreased migration, an aging workforce, fewer high growth firms, slow recovery from the recession, and a failure to attract or retain young, educated professionals. He recommended the state recapture its "people advantage" by educating its own, particularly in STEM fields, and supporting clusters, such as media, biotech, and advanced manufacturing along the seacoast, and advanced manufacturing, defense, and high tech along the I-93 corridor.

Dan Barrick, Deputy Director of the New Hampshire Center for Policy Studies, spoke at the final meeting on March 17 in Salem. Like Delay, Barrick noted that

Dennis Delay, New Hampshire Center for Public Policy Studies Economist, presenting at the CEDS Visioning Session in Nashua, NH.

Ross Gittell, Chancellor of the Community College System of New Hampshire, presenting at the CEDS Visioning Session in Raymond, NH.

Dan Barrick, Deputy Director of the New Hampshire Center for Policy Studies, presenting at the CEDS Visioning Session in Salem, NH.

New Hampshire faces two opposing economic trends: a growth in jobs, especially in the Nashua-Salem-Portsmouth area, combined with an aging workforce and lower workforce participation. Mr. Barrick stressed that there are no simple solutions to the challenge presented by these opposing trends, and noted that the region has struggled to attract and retain young people. He nonetheless highlighted a handful of possible approaches, such as efforts to better connect employers to young workers, efforts to improve the education system, efforts to increase immigration, and efforts to improve the region's business climate.

The Visioning Sessions and Online Survey

During the portion of each meeting dedicated to facilitated conversation, Hulet began by asking participants a series of broad questions. Although the exact questions were different in each meeting, they touched on the following issues:

- Those aspects of living and working in the southern New Hampshire region that participants most want to preserve;

Visioning Session, Nashua, NH.

Visioning Session, Raymond, NH.

- Those aspects of living and working in the region that are most challenging; and (in the latter two meetings only)

- Economic development strategies we are using that we should continue, and those that we should stop because they are not working.

The participants' responses to these questions tended to coalesce around a handful of themes. The participants were then divided into smaller breakout groups to brainstorm economic development goals and strategies related to the themes they had identified.

During the breakout sessions, participants were provided with posters and handouts identifying the goals and objectives from the 2010 CEDS.   In their breakout groups, participants reviewed these goals and objectives and commented on the degree to which they remain helpful and relevant today.

In the final portion of each meeting, the breakout groups reported to the full group on the ideas they had discussed, and participants offered questions and comments.   Ms. Hulet concluded the meetings by thanking participants and summarizing the various ideas that had emerged from both the small and the large group discussions.

Feedback from the Visioning Sessions

Themes

During the four visioning sessions and in the online survey, participants offered a broad range of comments and suggestions on regional development generally and the 2010 CEDS goals and objectives more specifically. The emphasis on particular issues varied by meeting,

and many of the comments are not easily distilled into simple statements or straightforward advice. Nevertheless, it is possible to observe a set of themes that cut across all four meetings, which were mentioned multiple times by a large number of participants. We recount five such themes below.

Theme 1: There are important synergies and linkages among the key development goals and objectives

In every meeting, participants pointed out important synergies and linkages among development goals and objectives across the CEDS categories. The 2010 CEDS lists six discrete categories of goals and objectives, and the CEDS document depicts these categories existing separately, side-by-side. However, participants' comments paint a picture more akin to multiple sets of interlocking puzzle pieces. Participants drew multiple connections between the goals of regional cooperation, workforce development, workforce housing, and infrastructure development. For example, they noted that to attract a young, educated workforce, the region would have to upgrade its infrastructure, zoning, and land use regulations to encourage the growth of mixed use districts supported by bus, rail, and public transportation.

In addition, participants maintained that the region should diversify its housing stock and provide access to water and sewer in order to offer younger workers affordable places to live. "We can't attract anyone if the cost of infrastructure is too high," one participant noted. These improvements, in turn, would only be affordable if pursued by multiple municipalities working together. "Infrastructure cannot be done on a town-by-town basis," suggested a different participant. "We need to cooperate."

Other participants maintained that efforts to attract new business clusters would only be successful if combined with efforts to educate workers through the community college system and efforts to encourage regional cooperation around ensuring access to affordable housing. One of the survey responses aptly demonstrated the interconnectedness of the region's demographic, housing, infrastructure, and business development challenges in a single sentence: "We need to reverse the gentrification of the region so that younger people just starting out can live here, close to jobs of all ranges, and not be forced into long commutes," the respondent suggested.

Visioning Session, Salem, NH.

Goals and Objectives

These comments suggest that participants see the CEDS goals and objectives as parts of an interdependent system, and believe it is important to pursue multiple goals across the different CEDS categories simultaneously as part of a comprehensive regional strategy.

Theme 2: Demographic shifts represent a critical challenge

Within each of the four meetings, a large number of comments and suggestions focused on attracting and retaining a younger, educated workforce. This emphasis on demography cut across the comments' substantive areas of focus. For example, the discussion on small business development touched on how to encourage younger people to start new small businesses and how to educate older business owners on how to hand off or sell their businesses to younger owners. Discussions on infrastructure development focused on developing more urban and town landscapes that fit the preferences of the Millennial generation (e.g. walk-able communities and mixed use districts). The discussions on workforce development and workforce housing focused substantially on how to educate younger workers who may lack the skills needed to work in STEM fields or advanced manufacturing, and how to provide attractive housing options for younger workers who want to live in smaller homes, condos, or rental units. The discussions on regional cooperation touched in part on the need for regional strategies to attract and retain younger workers.

Visioning Session, Salem, NH.

Theme 3: A regional approach is needed but faces structural and cultural challenges

Another key theme was the importance of regional cooperation to achieving many of the other development goals. Much like participants' comments on demography, the comments on regional cooperation cut across multiple substantive areas of focus. Participants highlighted the importance of regional cooperation to managing the high costs of infrastructure projects, attracting new and innovative businesses, developing a skilled workforce through the community college system, and ensuring the availability of attractive and affordable housing. Participants further noted that where regional cooperation is lacking, it is the smaller communities that suffer the most because they lack the resources of larger towns.

Even as participants emphasized the importance of regional cooperation, they also described deep political, historical, and cultural barriers in achieving it. They noted that the local tax and governance structures in New Hampshire tend to pit towns against each other and encourage a "fiefdom mentality." Municipal leaders focus on maximizing property taxes, not on creating affordable housing or developing regional infrastructure, and tend to view neighboring towns as competitors rather than allies. "They don't see it as a good thing if a nearby town gets the business," a participant said. "It's hard to break through that." A survey respondent noted, "To disassemble all these little fiefdoms which have been created over the years will take years."

Visioning Session, Portsmouth, NH.

Similarly, participants reported that many citizens have a "Not in My Back Yard" mentality when it comes to regional projects, and a strong cultural resistance to change. In this way, participants argued that New Hampshire's strong tradition of civic engagement – though laudable in many respects – may actually impede regional cooperation and development. In many towns, existing townspeople will actively oppose innovative approaches that would attract new, younger workers and families to the region. "The problem is that the people who are already there don't want it to change," a participant said.

Together, participants suggested that these realities make regional cooperation exceedingly hard to implement in practice, regardless of how attractive or necessary it may seem in theory.

Theme 4: The 2010 CEDS goals and objectives are still valid but should be made more specific and actionable

Overall, participants were largely supportive of the 2010 CEDS goals and objectives. Many of the participants' recommendations for regional development paralleled the 2010 goals or objectives, and participants reacted positively to the goals and objectives when reviewing them in detail in small groups. This suggests that the 2010 goals are still broadly relevant.

the bulleted lists of objectives in the CEDS should be phrased less like aspirational desires and more like specific, concrete action steps.

Theme 5: There is urgency to act on the region's challenges now

Lastly, participants in each meeting expressed urgency around tackling the region's economic development challenges now. Participants noted that the costs of inaction around issues like wastewater treatment, aging sewer systems, and outdated streetscapes grow every year. The region will have to address these challenges sooner or later, they argued, it is simply a question of whether they do it now when the costs and risks are manageable, or later when they are not.

Participants expressed similar urgency around regional cooperation, and implementing measures to address the region's demographic challenges. They suggested that the region would need to introduce new, proactive regional policies as the baby boomers near retirement to avoid losing businesses and educated workers to neighboring states like Massachusetts.

When participants were critical of the 2010 goals and objectives, they tended to want them to be fewer in number, more specific, and more "actionable." A number of participants stressed the importance of identifying clear, measurable goals, so they could track the region's progress and determine how it was performing. For example, participants requested that the region set measurable five- and ten-year development targets, and attach performance measures to issues like business money spent in the community and quantifiable improvements to workforce housing. Some participants suggested that

Visioning Session, Portsmouth, NH.

2015-2019 REDC CEDS Goals and Objectives

The development of the Goals and Objectives for the REDC CEDS for 2015-2019 was based upon the grassroots input provided at the four Visioning Sessions held throughout the region. The public forum process is outlined in detail in the previous section. REDC also incorporated its past experience in the development of the previous Five-Year CEDS in 2000, 2005, and 2010. REDC reviewed the draft Economic Development Goals and Objectives with the CEDS Steering Committee electronically before finalizing the material as part of this CEDS document.

The Goals and Objectives of the REDC CEDS are established to promote and encourage responsible economic development by creating high-skill, higher-wage jobs and support networks within innovative and growing industry sectors and clusters as a means to diversify the regional economy and improve the economic conditions in the area. REDC recognizes that economic development is varied and diverse, as is the support needed within our region. The Economic Development Goals and Objectives for the 2015-2019 REDC CEDS are as follows:

Infrastructure Development

To invest in infrastructure improvements, such as roads, bridges, sewers, water facilities, and broadband, and multi-modal transportation systems that will strengthen and diversify the regional economy.

- Encourage project options with a focus on regional cooperation or shared services;

- Maintain and expand the region's infrastructure to address the needs of existing businesses and residences, as well as to accommodate the needs of new and expanding businesses;

- Target infrastructure improvements to "pockets of distress" in accordance with sustainable development principles;

- Expand public transit systems through investments in bus and rail service as a means to maximize the mobility of the workforce;

- Encourage development of interconnected, multi-modal transportation systems with alternative travel networks and connections such as bike lanes, walkable communities, and ride share options; and

- Upgrade water, sewer, septic, and wastewater treatment infrastructure, as necessary, to meet recent regulatory changes.

Regional Cooperation

To develop cost-effective regional solutions to local problems as a means to improve municipal budgets and maintain the quality of life in the region.

- Consolidate local services to create economic efficiencies and improve the effectiveness of service delivery;

- Encourage the development of an economic development strategy and financial incentives at the state level that complements the business needs in southern New Hampshire;

- Facilitate collaboration between the private and public sectors as a means to create more effective and efficient public/private partnerships to address regional problems and expand the economy;

- Create and sustain spaces, forums, and events that encourage regional interaction;

- Highlight and share best practices and positive regional cooperation examples; and

- Work collaboratively on the development and implementation of infrastructure projects.

Workforce Attraction & Retention

To attract and retain a skilled workforce by providing the necessary support in the form of housing, education and training, networking, transportation options, and cultural/social opportunities.

- Leverage the resources available through the workforce development and university/community college systems to address the growing skill needs of the business community and regional workforce;

- Facilitate collaboration among the economic development stakeholders in the economic development, workforce development, and education sectors to address the current and future skill needs of the business community and regional workforce;

- Identify and address the employment and skill needs of firms within the specific growing industry sectors and innovative clusters in the region;

- Foster workforce development at the high school and vocational, trade, and technical school levels; and

- Enhance and augment the existing support network for startups and small- and medium-sized enterprises;

- Improve local networks and connections among young professionals and businesses; and

- Encourage projects, businesses, and services that provide cultural and social opportunities for a younger, educated demographic.

Affordable Housing

To develop diversified housing options for all income levels to ensure the availability of workers for expanding businesses and new firms in the region.

- Increase broad-base knowledge of programs available to homebuyers such as USDA rural development, FHA, and NH Housing Finance Authority programs;

- Work with communities and residents to identify the need for and benefits of a diversified housing stock, including homes at multiple price points;

- Work with employers, state and local housing and development entities, banks, and private developers to encourage the development of workforce housing on a regional basis;

- Promote pedestrian-friendly, mixed-use (residential and commercial) developments in the downtowns and village centers of the region; and

- Support the development of financial incentives for communities to work together on a regional basis to address the region's workforce housing needs.

Sustainable Living

To maintain the unique qualities of life in southern New Hampshire through sustainable living best management practices, the preservation of natural and historic resources, and a balanced approach to economic development.

- Encourage investment in environmentally sustainable development related to "green" products, processes, and buildings as part of the "green" economy;

- Support the agricultural and fishing industries serving the region;

- Build and rebuild the energy infrastructure of the region through conservation initiatives, development of renewable energy sources, and working with the public utility companies;

- Encourage a diversity of energy options to insulate against fluctuations in the energy market;

- Support the development of economically and environmentally balanced water and wastewater treatment infrastructure;

- Identify and redevelop "brownfields" sites to return them to productive economic use;

- Redevelop properties for industrial and commercial uses in "pockets of distress" areas, downtowns, and village centers through the use of targeted financial resources; and

- Promote tourism and recreational activities that reflect the historic, cultural, and natural resources of the region.

Priority & Vital Projects

Project Selection Criteria

Using the 2014 CEDS Priority Project List, REDC utilized its RFP (Request for Projects) process to update and create the 2015 Priority Project List. The RFP solicitation was mailed to all communities within the CEDS Region, and any other group that had a project on the 2014 list. REDC continued its dedication to bringing in new projects and focused on reaching out to communities with a newly designed, eye-catching flyer, in hopes of achieving better participation. REDC put together a package consisting of the flyer, the 2014 Priority Project list, the 2010-2014 CEDS Goals and Objectives, the CEDS Project Criteria, an explanation of the CEDS process and projects, and a new Project Submission form. In addition, a form for updates to existing priority projects was included for those communities with projects already on the list. Forms were also emailed to CEDS Steering Committee members and made available on the REDC website. Current project proponents received the CEDS Project Update form via email, postal service mail and a follow-up telephone call.

After collecting the new and updated project proposals, REDC staff reviewed each to ensure compliance with at least one of the CEDS goals and objectives. Projects were presented to the CEDS Steering Committee throughout the year, and each new project was discussed in detail. REDC staff made recommendations for additions and changes to the CEDS Priority Project List based on its review of the materials submitted by the municipalities and organizations. The Steering Committee approved changes to the List at both its February and April meetings.

2015 Priority Project List

The RPF process brought in three new priority projects, one each in Exeter, Hudson, and Nashua, (see section on following page) for the 2015 CEDS. Additionally, three projects were removed from the list. The city of Portsmouth reported that the Route 1A / Sagamore Bridge Replacement project was completed earlier in 2015, and therefore should be removed from the list. In addition, the town of Raymond informed the Steering Committee that there is no current interest in the long-term Flint Hill Eco-Sensitive Low Impact Design Business Park project and requested that it be removed from the list at this time, but did note that it may reemerge in the future. Finally, the town of Plaistow requested removal of the Railroad Extension project from the list after the majority of citizens voted not to support the rail extension to Plaistow.

For more detailed updates regarding each project, please refer to the Priority Project List, Project Matrix, and Project Details, starting on page 76.

Completed Priority Project Highlight: Sagamore Bridge

The new Sagamore Bridge reopened December 2014, replacing the 72 year-old bridge that was closed in October 2013 due to structural deficiencies. The bridge spans the tidal Sagamore River and connects Portsmouth and Rye via Route 1A. The new bridge is wider and allows for easier vehicular, pedestrian, and bicycle use.

The old bridge was knows as a "singing bridge" because of the humming sound tires generated when vehicles travelled over the bridge's metal grate surface. The new bridge surface has no grates and so the bridge no longer sings. For those missing the sound, the city preserved a recording of cars passing over the old bridge, which can be heard on the city's website.   www.cityofportsmouth.com/projects/12.htm

New Priority Project Details

The following is a descriptive listing of the three new priority projects on the 2015 list.

Epping Road Economic Development Initiative

Location: Exeter, NH

Project Description: The town approved a TIF district for parcels along Epping Road (Route 27) from Continental Drive to and through the Route 101 interchange. In anticipation of future development, the town plans to construct water and sewer lines along Route 27, an industrial-grade spur road with water and sewer, and a turn lane with necessary roadway infrastructure and traffic controls along Route 27. Only the first two parts of the project are covered by TIF funds. Possible funding sources for the balance of the project include local bonding, EDA grants, and private funds. The town of Exeter is responsible for the development of this project. At this time, it is estimated between 150 and 250 new jobs will be created once all phases of the infrastructure and private land development are completed.

Goals Addressed: ID   Time Frame: Short-term

Gordon Street Storage Tank

Location: Hudson, NH

Project Description: The town of Hudson must remove existing lead paint and repaint the exterior of the existing Gordon Street Water Storage Tank. If not completed, NHDES may shut down the use of the tank, reducing the town's storage capacity by 1 mil/gpd, which will impact the Clement Road Industrial Park and surrounding area. NHDES expects the town to address the problem by 2016. Estimated project cost is $650K; no funding sources identified. The town of Hudson is responsible for the development of this project. No jobs will be created as a result of this project; however, the completion of this project is necessary to project the integrity of the neighboring industrial park.

Goals Addressed: ID, SL   Time Frame: Short-term

25 Crown Street Redevelopment

Location: Nashua, NH

Project Description: MakeIt Labs, a not-for-profit organization community-operated workshop (hackerspace / makerspace), is looking to lease a 15,000 sf building located at 25 Crown Street from the city of Nashua. The building requires a number of improvements such as new plumbing and electrical, new garage doors, modified entryway, bathrooms, and exterior improvements. MakeIt Labs plans to relocate from its existing location to expand its space, as well as accommodate a planned technology incubator. Potential funding sources include CDFA tax credits and private funding. The city of Nashua and the tenant, MakeIt Labs, are responsible for the development of this project. No new jobs are anticipated at this time.

Goals Addressed: WF, SL   Time Frame: Short-term

Priority Project by Location & Duration
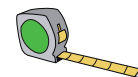
Short Term Intermediate Term Long Term
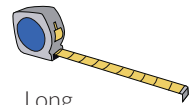
Derry

Route 28 Water & Sewer Expansion

Exeter

Epping Road Economic Development Initiative

YMCA Exeter Project

Greenland

Route 33 Sewer Expansion

Hampton
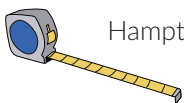
Hampton Intermodal Transportation Center

Hudson

Gordon Street Storage Tank

Londonderry

Pettengill Road Commerce Park

Nashua

Front & Franklin St. Mill District

Bridge St. Waterfront Development Site

25 Crown Street Redevelopment
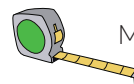
Mohawk Tannery Cleanup & Redevelopment

Pelham
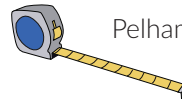
Pelham Route 38 Water/Sewer Study

Plaistow

Water/Waste Water Engineering & Needs Assessment

Portsmouth

Greenland Well Upgrade

Regional Biosolid/Septage Treatment Facility

REDC/Region-wide

REDC Revolving Loan Fund

Raymond

REDC Regional Business Development & Training Center
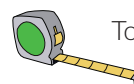
Town of Raymond Route 101 Exit 4 Development

Seabrook

NH Route 107 1-95 Bridge Expansion

Route 1 Expansion South of Route 107

Route 107 West (of I-95): Future Needs Analysis

Replacement of Harbor Seawall

Stratham

Stratham Gateway Project

Well Development/Testing/Permitting (Water System Phase I)

Water System Treatment/Storage/Distribution Design (Water System Phase II)

Waste Water Disposal/Testing/Permitting (Waste Water System Phase I)
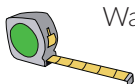
Water Supply System Construction (Water System Phase III)
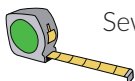
Sewer Collection/Treatment/Disposal Design (Waste Water System Phase II)
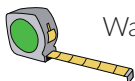
Waste Water System Construction (Waste Water System Phase III)
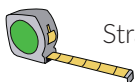
Stratham Town Center Project

Windham
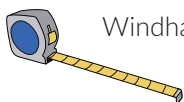
Windham Water Study

Short-term
- Route 28 Water & Sewer Extension
- Epping Road Economic Development Initiative
- YMCA Exeter Project
- Route 33 Sewer Expansion
- Gordon Street Storage Tank
- Pettengill Road Commerce Park
- Front & Franklin Street Mill District
- Bridge Street Waterfront Development Site
- 25 Crown Street Redevelopment
- Water/Waste Water Engineering & Needs Assessment
- Greenland Well Upgrade
- REDC Regional Business Development & Training Center
- NH Route 107 / I-95 Bridge Expansion
- Route 1 Expansion South of Route 107
- Route 107 West (of I-95) Future Needs Analysis (formerly
- Development and Master Plan)
- Replacement of Harbor Seawall
- Stratham Gateway Project
- Well Development/Testing/Permitting (Water System Phase I)
- Water System Treatment/Storage/Distribution Design (Water System Phase II)
- Waste Water Disposal/Testing/Permitting (Waste Water System Phase I)
- REDC Revolving Loan Fund

Intermediate-term
- Mohawk Tannery Cleanup & Redevelopment
- Town of Raymond Route 101 Exit 4 Development
- Water Supply System Construction (Water System Phase III)
- Sewer Collection/Treatment/Disposal Design (Waste Water System Phase II)
- Waste Water System Construction (Waste Water System Phase III)
- Stratham Town Center Project

Long-term
- Hampton Intermodal Transportation Center
- Pelham/Route 38 Water/Sewer Study
- Regional Biosolids/Septage Treatment Facility
- Windham Water Study

2015 REDC /CEDS Priority Project Matrix

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
Short-term (0 -24 Months to Completion)					
Route 28 Water & Sewer Extension Derry	Extend utilities to townline for future development.	$3.8 million	Local bonding	UNK	ID
Update: Phase II construction started June 2014. Project cost is $3.8 mil. 90% completed as of Dec. 2014. Final work will be done during May-August 2015.					
Epping Road Economic Development Initiative Exeter	Infrastructure project along Epping Road (Route 27) from Continental Drive to and through the Route 101 interchange to foster new commercial and industrial growth.	UNK	Private, TIF, local bonding, EDA	150 - 250	ID
Update: New project.					
YMCA Exeter Project Southern District YMCA	Demolition of abandoned asbestos contaminated building, cleanup of site, construction of 30K YMCA in two phases.	$5 million	Private, YMCA fundraising, Tax credit	15 - 30	SL, WF
Update: Contract for construction was signed in January 2014 and the capital fundraising began in earnest in June 2014. On September 16, the YMCA held a ceremonial groundbreaking with site work starting in October. Anticipated opening in Fall 2015.					
Route 33 Sewer Expansion Greenland	Extend Portsmouth municipal sewer from its existing location, through the commercial/industrial zone of Greenland along Route 33 and sections of Portsmouth Ave and Ocean Road.	$14 million	Local, Private, EDA	UNK	ID, SL
Update: The town of Greenland continues to work with Portsmouth, Stratham, and Exeter for a regional approach to wastewater treatment. The Planning Board has hired a consultant to investigate creating a TIF district to help finance the project.					
Gordon Street Storage Tank Hudson	Remove existing lead paint and repaint the exterior of the existing Gordon Street Water Storage Tank.	$650,000	UNK	0	ID, SL
Update: New Project.					
Pettengill Road Commerce Park Londonderry	Develop new roadway/ boulevard to gain access to over 1000 acres of commercial/industrial land.	$12.3 million	EDA, TIF, Local, Private	1,000-4,000	ID
Update: The town has approved three projects in the Pettengill area. A scaled down version of the original road project proposal is under construction, with private sources funding the work. Right-of-ways are in place for future expansion of the roadway.					
Front & Franklin Street Mill District Nashua	Redevelopment of mill district to private, mixed-use with public infrastructure.	Infrastructure only: $3.1 million	Private, TIF district, Local, Federal, EDA	UNK	ID, AH, SL
Update: The Cotton Mill Square project is fully leased and opening April 2015. The Broad Street Pkwy project construction is anticipated completing in fall 2015. The northwestern segment of the Nashua Riverwalk was completed in fall 2014.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF
Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
		Short-term (0 -24 Months to Completion)			
Bridge Street Waterfront Development Site Nashua	Rebuild at 30-acre site into mixed-use, new-urbanist designed community.	$4.3 million	NH DOT, EPA, EDA Brownfields, Private, TIF	UNK	ID
Update: The $15 million underground CSO Screening and Disinfection Facility is completed. The city has hired STV Group to complete a strategy for replacing wastewater and transportation infrastructure. Renaissance Downtowns received approval of a modification to its site plan in August 2014, with anticipated start date in fall 2015.					
25 Crown Street Redevelopent Nashua.	Update and make necessary building improvements to existing 15,000 sf building located at 25 Crown Street to accommodate relocation of MakeIt Labs.	$100,000	Tax credit, Private, Local	0	WF, SL
Update: New Project.					
Water/Waste Water Engineering & Needs Assessment - Plaistow	Update a comprehensive engineering and needs assessment report from the 1970s addressing water supply and wastewater treatment.	$150,000	EPA, USDA, State, Local	0	ID, SL
Update: In 2014, Plaistow received $118,000 from the GREE Fund to assist in updating the town's 1973 water system study. The town has identified concern with MtBE contamination as one of the primary needs to update the study, which will focus on protecting the town's drinking water. In addition, public water and wastewater treatment is needed to assist with job creation and economic development, most especially along Route 125.					
Greenland Well Upgrade Portsmouth	Upgrades at Greenland Well to improve reliability & efficiency of region's water source.	$1 million	Municipal Bonding	UNK	ID, SL, RC
Update: In 2014, the city council approved a municipal bond to fund the project. An RFP was issued and consultant selected for the work. Anticipated start date is 2015.					
REDC Regional Business Development and Training Center - REDC	Construction of new 5,000 sf regional business development and training center with new REDC offices.	$1.1 million	EDA, REDC, CDFA tax credits, USDA	UNK	WF, SL
Update: REDC moved its offices in February 2014. REDC held a ribbon cutting in May 2014. REDC began a series of business development workshop and classes in September 2014. In addition, REDC is working with Manchester Community College to hold a WorkReadyNH session at our training center. Finally, groups such as the Small Business Administration and SCORE, have advisors who hold office hours using REDC's free, day-use office space. Due to a few outstanding issues, the EDA grant close out deadline was moved to summer 2015.					
NH Route 107 / I-95 Bridge Expansion Seabrook	Widening a bridge that provides access to the Seabrook business district and is the connector between eastern and western portions of the town.	$6.4 million	Private, State, Local	0	ID
Update: The bridge construction widening is completed, with finish pavement applied to the newly expanded Route 107 travel lanes and ramps onto I-95. DOT and private developers continue to finalize work at the Route 1 / Route 107 interchange in connection with the new retail development along Route 1.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF
Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Priority & Vital Projects

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
Short-term (0 -24 Months to Completion)					
Route 1 Expansion South of Route 107 Seabrook	Widening main road through Seabrook business district for improved traffic flow.	$1.5 million	Private, State DOT, Local	UNK	ID
Update: DDR Seabrook Commons (400,000 sq ft retail development, which will bring 750 new jobs) opened August 2014. Additionally, Waterstone Retail Development is under construction. Developer is funding and completing certain aspects of the widening project, to include intersection improvements at Route 1 and Route 107. NHDOT is working with landowners to obtain necessary strips of land for new right-of-way. Construction expected to begin in 2017.					
Route 107 West (of I-95) (Future Needs Analysis) - Seabrook	Plan to evaluate and analyze the feasibility for the highest and best future development of Route 107 in Seabrook, west of the interchange with I-95.	$50-60,000 for study only	Public, Private, NHHFA Challenge Grant	UNK	ID, SL
Update: The town, with assistance from Rockingham Planning Commission and a NHHFA Challenge Grant, completed a study of the project area, which resulted in the recommendation for an Aquifer Protection Overlay Zone and ordinance. The zone and ordinance were approved by voters in March 2015. The town continues to analyze future needs with a focus on future traffic and transportation needs.					
Replacement of Harbor Seawall Seabrook	Repair and restore approximately 550 linear feet of failing seawall abutting the Seabrook/Hampton Harbor.	$1.2 million	Local, Private, EDA	0	ID, SL
Update: The town voters approved partial funding for the replacement construction. Working with REDC, the town is investigating additional funding sources to come up with a match for an EDA grant application. The town anticipated applying for funding with EDA in summer/fall 2015.					
Stratham Gateway Project Stratham	Upgrade water lines in business corridor for job growth.	$1 million	EDA, Local, Private	UNK	ID, SL
Update: During 2014, the town drafted revised stormwater management regulations in compliance with EPA's MS4 requirements. It is anticipated the town will adopt the regulations in 2015. The town is pursuing additional studies regarding infrastructure improvements needed to increase development potential in the project area.					
Well Development/ Testing/ Permitting (Water System Phase I) - Stratham	Complete analysis of two potential well sites, construct production well, test water quality/quantity, seek NHDES permits to use as water supply for Route 108 commercial corridor/town center.	$150,000	Local, State, Coastal, TIF	UNK	ID, SL, RC
Update: Stratham continues to work with Exeter on a combined system for water supply and distribution, while temporarily postponing work on well development for Stratham. An agreement for shared water supply will be considered in 2016.					
Water System Treatment/ Storage/Distribution Design (Water System Phase II) - Stratham	After Phase I completed: design a water supply treatment, storage and distribution system for 108 corridor/town center. May be a multi-jurisdictional project with Exeter.	$400,000	Local, State, Coastal, TIF	UNK	ID, SL, RC
Update: This phase is dependent on the results of Phase I.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF

Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
	Short-term (0 -24 Months to Completion)				
Waste Water Disposal/ Testing/Permitting (Waste Water System Phase I) - Stratham	Evaluation and testing of potential site for waste water discharge for Route 108 commercial corridor/ town center; obtain DES permits.	$175,000	Local, State, Coastal	UNK	ID, SL, RC
Update: Stratham continues to work both independently and cooperatively with Exeter on a regional approach to wasterwater treatment. Stratham and Exeter hired Underwood Engineers, which completed an evaluation on the feasibility of connecting to a regional facility in the City of Portsmouth. The study demonstrated the option is technically viable.					
REDC Revolving Loan Fund REDC	Establishment of an EDA RLF to supplement existing loan funds. The money will be used to make loans to new & existing businesses across the region.	$500,000 - $1 million	50% RLF EDA grant; 50% TBD	UNK	WF
Update: REDC filed an application for an EDA RLF in October 2014. In January 2015, the EDA informed REDC that the proposed match for the grant application did not meet the RLF application requirements. After discussion with Alan Brigham, EDR, regarding the requirements, REDC opted to hold off resubmitting the application at this time. However, REDC will continue to pursue a match that satisfies the EDA requirements and hopes to reapply within the next fiscal year.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF
Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Priority & Vital Projects

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
Intermediate Projects (2 - 4 Years to Completion)					
Mohawk Tannery Cleanup & Redevelopment Nashua	Revitalization of former tannery site, cleanup, and reuse of 39 acres for mixed use.	$5.65 million	Private, EPA, EDA, Federal	UNK	ID, AH, SL
Update: The city continues to work with a local developer and U.S. EPA to develop a framework for cleaning up the site. The Broad Street Parkway project is underway and is scheduled for completion in the fall of 2015. Additionally, the city received a site assessment grant from NH DES to evaluate a neighboring property which faces similar development challenges.					
Town of Raymond Route 101 Exit 4 Development Raymond	Development of 300 acres for mixed use and wastewater treatment.	$80 million	EDA, TIF, USDA, CDBG, Private	UNK	ID, AH, SL
Update: The site is being actively marketed, with the wetlands permit the only outstanding permit needed.					
Sewer Collection/ Treatment/ Disposal Design (Waste Water System Phase II) - Stratham	After Phase I is completed: design a sewer collection, treatment, and disposal system for 108 corridor/town center. May be a multi-jurisdictional project with Exeter.	$600,000	TIF, State, Bonds, Local	UNK	ID, RC, SL
Update: This phase is dependent on the results of Phase I.					
Water Supply System Construction (Water System Phase III) - Stratham	After Phase II is completed: construct water system for 108 corridor/town center. Maybe a multi-jurisdictional project with the town of Exeter.	$4.5 million	TIF, State, Bonds, Local	UNK	ID, RC, SL
Update: This phase is dependent on the results of Phase II.					
Waste Water System Construction (Waste Water System Phase III) - Stratham	After Phase II is completed – construct waste water system for 108 corridor/town center. May be a multi-jurisdictional project with Exeter.	$6 million	TIF, State, Bonds, Local	UNK	ID, RC, SL
Update: This phase is dependent on the results of Phase II.					
Stratham Town Center Project Stratham	Infrastructure Improvements and Master Plan study aimed at increasing development potential, future job growth, and housing needs.	$90,000	Local – municipal	UNK	ID, AH, SL
Update: In 2014, the town approved a form-based code zoning ordinance for the area. During 2015, the town will continue to examine the area for ways to improve multi-modal transportation, traffic mitigation, housing, energy savings, and other infrastructure needs. It is anticipated that the draft Area Master Plan will be adopted by the town in 2015. The town continues to work on the streetscape and pedestrian improvements, using the NHDOT Transportation Enhancement funding. Engineering and construction of the project will be completed in 2015.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF

Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals

Long-term Projects (5+ Years to Completion)

Project Name & Proponent	Project Description	Estimated Cost	Possible Funding Source	Jobs Created	Goals
Hampton Intermodal Transportation Center Rockingham Planning Commission with Hampton	Development of an intermodal transportation center at the Route 1 – Hwy 101 interchange constructing new center w/ Park & Ride facility and several multi-user transportation participants.	Center: $4 Million; Road: $19 Million, Reconfiguration: $19 Million	Fed Highway programs (CMAQ), state DOT, Brownfields	UNK	ID, RC
Update: Phase II Environmental Site Assessment and conceptual designs for new interchange realignment and intermodal center were completed in 2013. Designs were presented to the public in fall 2013, where preferred designs were selected. Cost estimates for the preferred designs are significantly lower than earlier designs included in the 2009 U.S. Route 1 Corridor Study. Next step is to present the project, funding options and implementation plan to town of Hampton, expected in fall 2015, followed by submittal to NH DOT for the 10-year plan.					
Pelham/Route 38 Water/ Sewer Study Pelham	Engineering study to determine how to provide infrastructure along Pelham's business corridor to foster economic growth and development.	$30,000-$50,000	UNK	UNK	ID, SL
Update: No changes in, or updates to, the proposal. Seeking funding opportunities.					
Regional Biosolids/Septage Treatment Facility Portsmouth	Design and construction of a regional biosolid/septage treatment and energy recovery facility.	$6-7 million	Private, user fees, Local, State/ Federal grants, EPA, EDA	UNK	ID, SL, RC
Update: Project was endorsed by the city's Sustainability Committee in past year. No changes to the status of the project.					
Windham Water Study Windham	A water needs and assessment study to help the town determine the costs associated with implementing a public water system.	UNK	Local - Municipal	UNK	ID, SL
Update: New Project.					

Infrastructure Development = ID   Regional Cooperation = RC   Workforce Attraction & Retention = WF
Affordable Housing = AH   Sustainable Living = SL   Unknown at this time = UNK

Projects Removed from Priority Project List

Development of Railroad Station - Plaistow	In March 2015, a Citizen's Petition to support the rail extension to Plaistow was presented to voters, and citizens voted not in favor of the project. Subsequently, the Board of Selectmen voted to support a "no build" option and requested the project be removed from the list.
Route 1A / Sagamore Bridge Replacement Portsmouth	Project was completed in spring 2015.
Flint Hill Eco-Sensitive Low Impact Design Business Park - Raymond	This project is being removed at the request of the town. It may re-emerge in the future.

Vital Project Criteria

While the Priority Project List is a comprehensive list of all of the projects that the CEDS recognizes and supports, federal regulations also require the CEDS to include a vital project list that "prioritizes those projects that address the region's greatest needs or best enhance competitiveness." With that for direction, at its first meeting, the CEDS Steering Committee developed a set of criteria that could be used for consideration to determine the vital projects. Next, REDC staff conducted an online search for how other communities develop their project lists. Subsequently REDC created a worksheet, giving points to each criterion, and tested projects to see how it worked. After a few tweaks, the worksheet was finalized. Vital projects were selected based on the following definition:

A vital project is a project, program, or activity that addresses the region's greatest needs or that will best enhance the region's competitiveness. A vital project shall meet one or more of the region's CEDS goals and objectives, and shall be evaluated based on the following criteria:

- Compliance with CEDS goals and objectives
- Project support
- Ability to facilitate additional economic development
- Regional impact
- Number of jobs created and/or retained
- Availability of funding
- Project readiness

2015 Vital Project Project List

Based on the criteria outlined in the previous section, the REDC staff, with input from the CEDS Steering Committee, recognizes the following three projects as Vital Projects for the 2015 CEDS.
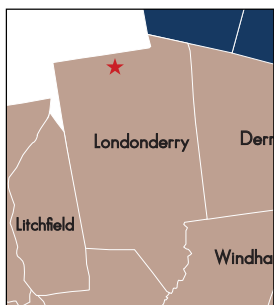
Pettengill Road Commerce Park located in Londonderry. The purpose of this project is to redevelop the existing Pettengill roadway and install public sewer to gain access to approximately 1,000 acres of commercial and industrial land that is adjacent to the Manchester-Boston Regional Airport and along the I-93 corridor. The first phase of the project, already under construction, will bring in an estimated 1,000 new jobs. At build-out, this project is estimated to create more than 4,000 new jobs for the region.

Front & Franklin Street Mill District Development located in Nashua. The Nashua area was once home to a thriving mill industry, which left the city with several unoccupied buildings. The Front & Franklin Street Mill project capitalizes on its location and the historic buildings by redeveloping the site to a private, mixed-use development with public infrastructure improvements and recreational uses. This project proposes to clean up and reuse a Brownfields site and create much needed workforce housing for the region.

Replacement of the Harbor Seawall in Seabrook. Seabrook is home to the Seabrook/ Hampton Harbor, which is a crucial part of the NH Ports and Harbor system and is utilized by commercial fishermen and regional businesses and industries. Approximately 550 linear feet of the existing seawall is failing, which could result in the closing of a section of the harbor area for commercial and recreational use and would have significant economic impact. This project proposes to repair and restore the failing section and abutting site.

Plan of Action

With the development of the region's CEDS, REDC will work to support and implement projects, programs, and activities that promote economic development and opportunity throughout southern New Hampshire. REDC will continue to meet its obligations as an Economic Development District (EDD) by (1) coordinating and implementing economic development activities in the district, (2) carrying out economic development research, planning, implementation, and advisory functions identified in the CEDS and (3) coordinating the development and implementation of the CEDS with other local, state, federal, non-profit and private organizations.

For the 2015 CEDS, REDC developed a new set of Goals and Objectives, which will guide our activities during the five-year cycle from 2015-2019. REDC will use the following Plan of Action to direct our activities and implementation of the CEDS on an annual basis. Status of these action items is discussed in the Evaluation and Performance Measure section of the CEDS.

1. Continue CEDS grassroots planning process:

- Implement the EDA Planning Investment grant on an annual basis and develop the annual updates to the 2015 CEDS;
- Schedule four CEDS Steering Committee meetings as part of the program year;
- Maintain the required percentage of private sector representatives on the CEDS Steering Committee. If we fall below that percentage, then identify, recruit, train and orient private sector representatives for the CEDS Steering Committee. Key areas of interest include new and emerging technologies, renewable and traditional energy suppliers, expertise in green technologies, banking and financing, as well as real estate development;
- Host, or partner with other agencies to host, public events in order to keep stakeholders informed of the CEDS process and relevant economic development issues for our region;
- Provide demographic data and information developed through five-year CEDS process to municipalities, businesses, non-profit groups, and the public through an enhanced website and regular electronic updates.

2. Promote economic development and opportunities:

- Develop a program of classes and/or guest speakers for the REDC Business Training Center. Provide local entrepreneurs with access to instruction, computers, and reference materials to facilitate the creation of new rural businesses and the expansion of existing businesses;
- Continue work with the Brownfield's Advisory Committee to redevelop blighted areas and encourage economic growth;
- Meet with representatives from distressed communities to identify infrastructure and community needs;
- Pursue microlending capacity and clients to build on our CDFI designation;
- Pursue and utilize additional funding sources and opportunities;
- Provide technical assistance and financing for expanding businesses that create jobs; and
- Assist other communities as requested.

3. Implement the CEDS Goals and Objectives:

- Identify projects, programs, and activities that address one or more of the CEDS Goals via the CEDS Priority Project process and by increasing outreach to local communities and stakeholders;
- Provide funding for local projects that support the CEDS goals and objectives through the availability of additional EDA project funds;
- Develop/sponsor forums that address one or more of the CEDS objectives;
- Work with the Steering Committee to identify opportunities to address a set of the CEDS objectives on an annual basis;
- Continue to provide grant and loan opportunities to the region with the REDC $1.825 million EDA Brownfield's grant;
- Create opportunities that encourage local and regional interactions, include state agencies when appropriate; and
- Provide technical assistance to the proponents of Priority Projects, as needed. Identify key Priority Projects that are eligible for EDA funding opportunities. Provide grant writing and management assistance as needed for these projects.

Evaluation

Evaluation and Performance Measures

The REDC evaluates the success of its work in developing and implementing the CEDS using a variety of performance measures. The performance measures are divided into three categories: private sector investment, action plan items and objectives, and the EDA planning grant. REDC will report the progress in each of these performance measures on an annual basis in the Evaluation Section of the CEDS.
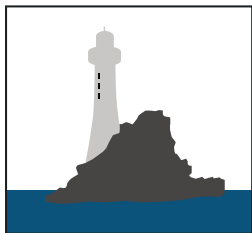
Private Sector Investment

One of the primary goals of the CEDS is to create economic development through private sector investment and growth. REDC gauges success using the following performance measures:

- Number of new jobs created in our region;
- Number of jobs retained in our region;
- Number and types of investments undertaken in the region;
- Amount of private sector investment in our region.

Action Plan Items and Objectives

REDC has a comprehensive list of Goals and Objectives, which will be used to guide our Priority Projects, programs, and activities throughout the next five years. REDC gauges success based on the following performance measures:

- Number of Priority Projects started;
- Number of Priority Projects completed;
- Number of new Priority Projects added to the list;
- Number and types of investments in areas supporting the Goals and Objectives;
- Number and types of programs/activities implemented in areas supporting the Goals and Objectives;
- Compliance with and completion of the CEDS Plan of Action.
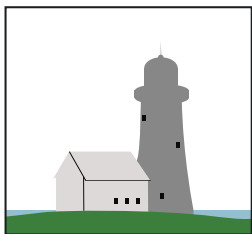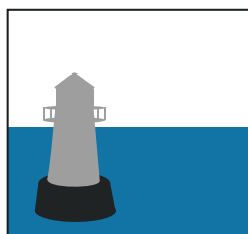
EDA Planning Grant Scope of Work

Funding for the CEDS and its annual updates comes in part from the Department of Commerce, Economic Development Administration. As part of the grant award, the REDC agrees to complete the annual CEDS and provide semi-annual Performance and Project Progress Reports. The EDA authorizes a Scope of Work with each grant award. REDC gauges success based on completing the annually approved EDA Scope of Work. For the 2014-2015 grant award, that includes:

- Complete a new five-year CEDS (2015 CEDS).
- Continue the grassroots on-going planning process, which includes the production, dissemination and implementation of the CEDS five-year plan and annual updates.
- Create a new vision and set of regional goals for the upcoming five-year planning cycle (2015-2020).
- Provide two to four public planning forums throughout the region to gather input for creating the region's vision and goals.
- Identify projects for inclusion on the Priority Project List. Provide technical support for projects on the region's Priority Project List, including identification of potential funding sources, assistance in grant writing, and providing grant management.
- Active participation in the region's Brownfields Assessment and new Brownfields Clean up programs.
- Provide financing and technical assistance to the private sector where job growth, emerging technologies and/or recycling efforts are part of the outcome.
- Identification of, recruitment, training, and orientation for private sector representatives for key CEDS committees. These members will represent new and emerging technologies, green technologies, banking and finance, as well as real estate developers.

Annual Evaluation

Private Sector Investment

Since April 2014, REDC has approved 12 loans for a total amount of $1,581,400, helping to bring a total leveraged value of $21,476,166 into southern NH's economy. REDC helped businesses create 65 new jobs and retain 13 jobs during those months. In addition, we have counseled 43 new businesses, many of which were able to receive private sector investment.

REDC provided funding to a wide variety of businesses, including:

- Medical Services
- Equipment Installation
- Medical Device development
- Day Care

- Manufacturing
- Manufacturing/Food
- Assisted Living Facility
- Brewery

- Dental Office
- Sober Living Facility
- CNC Machining

In addition to the investments made by REDC, there were two Priority Projects that were finalized during the year. The Route 1A/Sagamore Bridge Replacement in Portsmouth, NH repaired/replaced a bridge that carried loads well above the designed limits. The project was approximately $5 million with 80% state financed and 20% local city match. Also, the REDC Business Training Center opened in February 2014. The EDA supplied a $432,185 Public Works Grant, which was matched by REDC and private investment ($659,315 REDC and $108,500 private).
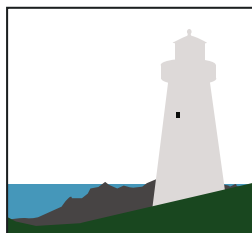
Action Plan Items and Objectives

With the new five-year CEDS, REDC updated its Plan of Action. The Plan of Action is divided into three categories, and each is evaluated, below.

Continue CEDS grassroots planning process.

During the past 12 months, REDC has met this action item by completing and filing the 2014 CEDS Update, working on the 2015 CEDS, which will be submitted on time, holding four Steering Committee meetings through the planning cycle, updating the Priority Project list, creating a Vital Project list, holding four public events/workshops throughout our region, developing new five-year Goals and Objectives, completing the evaluation for the past 12 month cycle, and updating all available demographic data. In addition, REDC actively recruited new private-sector representatives for the CEDS Steering Committee and continues to meet the 50% composition requirement for private sector representatives.

Promote economic development and opportunities.

The opening of the REDC Business Training Center has been an economic boon to the southern NH region. With its spacious classroom, day-use office space, and

REDC Training Center, Raymond, NH.

modern technology, the Center has hosted a number of meetings and events for a wide array of uses. Additionally, REDC has hired an in-house Business Advisor who has counseled over 40 businesses during the past year. As well as providing business advice, REDC now offers assistance with marketing and design to its clients.

Groups such as the Small Business Development Center (SBDC), Service Corps of Retired Executives (SCORE), NH Department of Resources and Economic Development (DRED), NH Bureau of Vocational Rehabilitation, and various lenders have held meetings and met with clients in our day-office space. REDC hosted a WorkReadyNH course, administered by Manchester Community College, providing training to under- and unemployed residents in soft skills and other areas needed to enter the workplace. REDC also hosts its own business development workshops and classes, free of charge.

Implement the CEDS Goals and Objectives

REDC worked with a number of communities in its region to provide economic development advice and provide assistance when needed. REDC continued to work with the towns of Hudson and Nashua on their Brownfields grants and the city of Keene on its Brownfields loan.

REDC continued to work closely with the town of Seabrook on a much-needed seawall repair infrastructure project, anticipating submittal for funding assistance from the EDA. REDC also met with several towns in the Seacoast region to look at the possibility of regional wastewater infrastructure.

During the year, REDC added three new priority projects, one each in Exeter, Hudson, and Nashua, for the 2015 CEDS. Additionally, one project was completed during the past year. The city of Portsmouth reported that the Route 1A / Sagamore Bridge Replacement project finished up earlier in 2015, and therefore should be removed from the list. Currently, there are 31 projects on our Priority Project List. Of those projects, 15 are currently underway, in either the planning stages or actual construction.
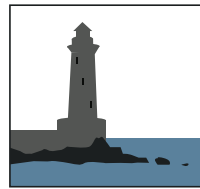
EDA Planning Grant Scope of Work

Complete a new five-year CEDS (2015 CEDS). Continue the grassroots on-going planning process, which includes the production, dissemination and implementation of the CEDS five-year plan and annual updates.

REDC is nearing the conclusion of the 2015 CEDS planning cycle. The 2015 CEDS will be completed and submitted to the EDA on or before June 30, 2015.

Create a new vision and set of regional goals for the upcoming five-year planning cycle (2015-2020).
REDC held four public events during March 2015 and gathered valuable input from stakeholders, businesses, and residents of our region. The REDC staff, with input from the Steering Committee, finalized the Goals and Objectives in May 2015.

Provide two to four public planning forums throughout the region to gather input for creating the region's vision and goals.

REDC completed this goal in March 2015. The following events were held throughout our region:

- March 3 @ 8:30 AM
  City Hall Auditorium, Nashua
  Guest Speaker: Dennis Delay, New Hampshire Center for Public Policy Studies

- March 5 @ 5:00 PM
  Grill 28, Portsmouth
  Guest Speaker: Ross Gittell, Chancellor of the Community College System of New Hampshire

- March 12 @ 8:30 AM
  REDC Training Center, Raymond
  Guest Speaker: Ross Gittell, Chancellor of the Community College System of New Hampshire

- March 17 @ 5:00 PM
  Tuscan Kitchen, Salem
  Guest Speaker: Dan Barrick, Deputy Director of the New Hampshire Center for Public Policy Studies

Visioning Session, Raymond, NH.

Identify projects for inclusion on the Priority Project List. Provide technical support for projects on the region's Priority Project List, including identification of potential funding sources, assistance in grant writing, and providing grant management.

REDC reached out to its member communities and interested stakeholders from October through December 2014 to solicit updates to and new projects for the 2015 Priority Project List. REDC received three new projects for the 2015 list. Additionally, REDC continued to work with the town of Seabrook on its seawall repair project, and met with communities on the seacoast about a potential wastewater project.

Active participation in the region's Brownfields Assessment and new Brownfields Clean up programs. REDC continues to actively pursue projects for its Brownfields Program. REDC worked closely with the town of Hudson on its new recreation field. The town was awarded a $500,000 grant to convert a contaminated asbestos dump site to a recreation field. In additional, REDC continues to work with the developers of the Cotton Mill Square in Nashua, NH. REDC closed on a $265,000 loan to Cotton Mill Square

to remediate and convert an existing mill building to low-income housing. The third project REDC is working on is a loan for $317,000 and a subsequent sub-grant for $82,500 to clean up old railroad land for future development in downtown Keene, NH.

Provide financing and technical assistance to the private sector where job growth, emerging technologies, and/ or recycling efforts are part of the outcome. Since April 2014, REDC has approved 12 loans for a total amount of $1,581,400, helping to bring a total leveraged value of $21,476,166 into southern NH's economy. REDC helped businesses create 65 new jobs and retain 13 jobs during those months.

Identification of, recruitment, training, and orientation for private sector representatives for key CEDS committees. These members will represent new and emerging technologies, green technologies, banking and finance, as well as real estate developers.

During the 2015 CEDS planning cycle, REDC has maintained the necessary ratio of private sector to public representatives. This year, we welcomed two new private sector representatives to the committee.

Steering Committee

The first step in creating a successful Comprehensive Economic Development Strategy is to form a steering committee that is a broad-based representation of the major interests of the region. Once again, REDC started with the previous year's CEDS Steering Committee as a starting point to develop this year's committee. The 2015 Steering Committee and support staff are listed below.

REDC Staff

Laurel Bistany	President	Laurel@redc.com
Jennifer Kimball	CEDS Planner	Jennifer@redc.com
Laura Harper	Administrative Assistant/Graphic Designer	Laura@redc.com
Beth Johnson	Accountant	Beth@redc.com
Chris Duffy	Business Advisor	Chris@redc.com

Consultants

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Cliff Sinnott	Rockingham Planning Commission	csinnott@rpc-nh.org
Ross Gittell	Chancellor, Community College System of NH	rgittell@ccsnh.edu
Carri Hulet	Consensus Building Institute	chulet@cbuilding.org
Toby Berkman	Consensus Building Institute	tberkman@cbuilding.org
Dennis Delay	New Hampshire Center for Public Policy Studies	ddelay@NHPolicy.org

CEDS Steering Committee Meetings

Date	Meetings	Location	Agenda
11/19/2014	CEDS Steering Committee Meeting #1	Derry	Review of 2014 CEDS. Discuss 2015 CEDS timeline and process. Discuss regulations for 5-year CEDS. Discuss Priority Project Process. Work on Vital Project selection criteria. Discuss public forum process, types of speakers, topics of interest.
2/11/2015	CEDS Steering Committee Meeting #2	Seabrook	Discuss upcoming public sessions and changes to the CEDS. Review submitted updates for Priority Project List. Presentation of new projects in Nashua and Exeter. Work on Vital Project selection criteria.
4/15/2015	CEDS Steering Committee Meeting #3	Hudson	Review results from public sessions and CBI draft report. Discuss general concepts for 2015-2019 Goals & Objectives. Approve 2015 Priority Project List. Finalize Vital Project selection criteria.
06/24/2015	CEDS Steering Committee Meeting #4	Raymond -REDC	Review and approval of the 2015 CEDS.

CEDS Steering Committee Members

Name	Representing
John Akers	NH Electric Co-op
Nancy Carmer	City of Portsmouth
Ernie Cartier-Creveling	Town of Raymond
Catalina Celentano	Eversource Energy
David Choate	Colliers International
Daniel Clapp	ReVision Energy LLC
Glenn Coppelman	Town of Kingston
Bev Donovan	Greater Haverhill Chamber
Katy Easterly Martey	NH CDFA
Carol Estes	Kennebunk Savings
Tom Galligani	City of Nashua
Jeff Gowan	Town of Pelham
Warren Henderson	Small Business Entrepreneur, REDC Board
Michael Houghton	Dowling Corporation
Barbara Kravitz	Rockingham Planning Commission
Len Lathrop	Hudson/Litchfield News, Town of Hudson
Susan Blake Lee	Town of Merrimack ED Citizens Committee
Robert McDonald	Santander Bank
Wes Moore	Moorecast, iPlayer HD
Julian Kiszka	Town of Plaistow
Peter Rayno	Enterprise Bank
George Sioras	Town of Derry
Lin Tamulonis	Great Bay Community College
Ralph Valentine	The Valentine Group
John Vogl	Town of Londonderry
Scott Zeller	RallyMe.com

Appendix

Table A-1: Population History and Estimates

2015 CEDS

Town/Area	U.S. Census 1950	1960	1970	1980	1990	2000	2010	OEP 2008	2009	2010	2011	2012	2013	1-yr 2012-2013	% change	5-yr 2008-2013	% change	avg. annual growth rate
East Kingston	449	574	838	1,135	1,352	1,784	2,357	2,256	2,281	2,358	2,363	2,365	2,372	7	0.3%	116	5.1%	1.0%
Exeter	5,664	7,243	8,892	11,024	12,481	14,058	14,306	14,497	14,777	14,314	14,354	14,366	14,454	88	0.6%	-43	-0.3%	-0.1%
Greenland	719	1,196	1,784	2,129	2,768	3,208	3,549	3,401	3,438	3,551	3,586	3,628	3,699	71	2.0%	298	8.8%	1.8%
Hampton	2,847	5,379	8,011	10,493	12,278	14,937	15,430	16,032	15,072	14,868	14,887	14,887	14,979	92	0.6%	-1,053	-6.6%	-1.3%
Hampton Falls	629	885	1,254	1,372	1,503	1,880	2,236	2,085	2,102	2,237	2,235	2,239	2,241	2	0.1%	156	7.5%	1.5%
Kensington	542	708	1,044	1,322	1,631	1,893	2,124	2,098	2,110	2,125	2,121	2,118	2,113	-5	-0.2%	15	0.7%	0.1%
New Castle	583	823	975	936	840	1,010	968	1,018	1,023	969	967	970	971	1	0.1%	-47	-4.6%	-0.9%
Newfields	469	737	843	817	888	1,551	1,680	1,657	1,670	1,681	1,678	1,678	1,683	5	0.3%	26	1.6%	0.3%
Newington	494	2,499	798	716	990	775	753	787	791	753	753	750	748	-2	-0.3%	-39	-5.0%	-1.0%
Newmarket	2,709	3,153	3,361	4,290	7,157	8,027	8,936	9,243	9,276	8,941	8,950	8,942	9,173	231	2.6%	-70	-0.8%	-0.2%
North Hampton	1,104	1,910	3,259	3,425	3,637	4,259	4,301	4,437	4,472	4,303	4,324	4,394	4,421	27	0.6%	-16	-0.4%	-0.1%
Portsmouth	18,830	25,833	25,717	26,254	25,925	20,784	20,779	20,520	20,668	21,245	21,206	21,273	21,280	7	0.0%	760	3.7%	0.7%
Rye	1,982	3,244	4,083	4,508	4,612	5,182	5,298	5,133	5,151	5,301	5,324	5,336	5,336	0	0.0%	203	4.0%	0.8%
Seabrook	1,788	2,209	3,053	5,917	6,503	7,934	8,693	8,363	8,373	8,698	8,697	8,732	8,768	36	0.4%	405	4.8%	1.0%
South Hampton	314	443	558	660	740	844	814	886	891	814	813	811	810	-1	-0.1%	-76	-8.6%	-1.7%
Stratham	759	1,033	1,512	2,507	4,955	6,355	7,255	7,225	7,259	7,259	7,245	7,270	7,280	10	0.1%	55	0.8%	0.2%
CEDS Eastern Communities	**39,882**	**57,869**	**65,982**	**77,505**	**88,260**	**94,481**	**99,479**	**99,638**	**99,364**	**99,534**	**99,484**	**99,759**	**100,328**	**569**	**0.6%**	**690**	**0.7%**	**0.1%**
Atkinson	492	1,017	2,291	4,397	5,188	6,178	6,751	6,443	6,466	6,755	6,741	6,739	6,732	-7	-0.1%	289	4.5%	0.9%
Auburn	1,158	1,292	2,035	2,883	4,085	4,682	4,953	5,085	5,110	4,956	4,974	5,054	5,154	100	2.0%	69	1.4%	0.3%
Brentwood	819	1,072	1,468	2,004	2,590	3,197	4,486	4,183	4,279	4,489	4,497	4,623	4,666	43	0.9%	483	11.5%	2.3%
Candia	1,243	1,490	1,997	2,989	3,557	3,911	3,909	4,085	4,112	3,911	3,913	3,916	3,919	3	0.1%	-166	-4.1%	-0.8%
Chester	807	1,053	1,382	2,006	2,691	3,792	4,768	4,621	4,624	4,771	4,762	4,792	4,762	-30	-0.6%	141	3.1%	0.6%
Danville	508	605	924	1,318	2,534	4,023	4,387	4,427	4,438	4,389	4,424	4,441	4,436	-5	-0.1%	9	0.2%	0.0%
Deerfield	706	714	1,178	1,979	3,124	3,678	4,280	4,366	4,403	4,282	4,308	4,371	4,394	23	0.5%	28	0.6%	0.1%
Epping	1,796	2,006	2,356	3,460	5,162	5,476	6,411	6,104	6,256	6,415	6,501	6,544	6,617	73	1.1%	513	8.4%	1.7%
Fremont	698	783	993	1,333	2,576	3,510	4,283	4,159	4,200	4,285	4,316	4,364	4,432	68	1.6%	273	6.6%	1.3%
Hampstead	902	1,261	2,401	3,785	6,732	8,297	8,523	8,741	8,794	8,528	8,526	8,563	8,547	-16	-0.2%	-194	-2.2%	-0.4%
Kingston	1,283	708	2,882	4,111	5,591	5,862	6,025	6,125	6,163	6,028	6,010	6,007	6,011	4	0.1%	-114	-1.9%	-0.4%
Newton	1,173	1,419	1,920	3,068	3,473	4,289	4,603	4,532	4,589	4,606	4,661	4,693	4,734	41	0.9%	202	4.5%	0.9%
Northwood	966	1,034	1,525	2,175	3,124	3,640	4,241	4,110	4,136	4,243	4,235	4,249	4,252	3	0.1%	142	3.5%	0.7%
Nottingham	566	623	952	1,952	2,939	3,701	4,785	4,498	4,540	4,788	4,813	4,830	4,840	10	0.2%	342	7.6%	1.5%
Plaistow	2,082	2,915	4,712	5,609	7,316	7,747	7,609	7,612	7,629	7,613	7,584	7,576	7,563	-13	-0.2%	-49	-0.6%	-0.1%
Raymond	1,428	1,867	3,003	5,453	8,713	9,674	10,138	10,825	10,950	10,145	10,185	10,208	10,210	2	0.0%	-615	-5.7%	-1.1%
Sandown	315	366	741	2,057	4,060	5,143	5,986	5,961	6,001	5,989	6,076	6,136	6,184	48	0.8%	223	3.7%	0.7%
CEDS Central Communities	**16,942**	**20,225**	**32,760**	**50,579**	**73,455**	**86,800**	**96,138**	**95,877**	**96,193**	**96,526**	**96,690**	**97,106**	**97,453**	**347**	**0.4%**	**1,576**	**1.6%**	**0.3%**
Derry	5,826	6,987	11,712	18,875	29,603	34,021	33,109	34,071	34,318	33,129	33,008	33,008	32,988	-20	-0.1%	-1,083	-3.2%	-0.6%
Hudson	4,183	5,876	10,638	14,022	19,530	22,928	24,467	24,580	24,712	24,481	24,514	24,514	24,538	24	0.1%	-42	-0.2%	0.0%
Litchfield	427	721	1,420	4,150	5,516	7,360	8,271	8,468	8,528	8,276	8,275	8,303	8,330	27	0.3%	-138	-1.6%	-0.3%
Londonderry	1,640	2,457	5,346	13,598	19,781	23,236	24,129	24,567	24,729	24,144	24,132	24,137	24,209	72	0.3%	-358	-1.5%	-0.3%
Merrimack	1,908	2,989	8,595	15,406	22,156	25,119	25,494	26,139	26,278	25,508	25,454	25,473	25,474	1	0.0%	-665	-2.5%	-0.5%
Nashua	34,669	39,096	55,820	67,865	79,662	86,605	86,494	87,111	87,566	86,543	86,366	86,211	86,766	555	0.6%	-345	-0.4%	-0.1%
Pelham	1,317	2,605	5,408	8,090	9,408	10,914	12,897	12,454	12,550	12,897	12,894	12,898	12,970	72	0.6%	516	4.1%	0.8%
Salem	4,805	9,210	20,142	24,124	25,746	28,112	28,776	29,549	29,640	28,776	28,702	28,707	28,688	-19	-0.1%	-861	-2.9%	-0.6%
Windham	964	1,317	3,008	5,664	9,000	10,709	13,592	12,823	12,993	13,600	13,756	13,877	13,960	83	0.6%	1,137	8.9%	1.8%
CEDS Western Communities	**55,739**	**71,258**	**122,089**	**171,794**	**220,402**	**249,004**	**257,229**	**259,762**	**261,314**	**257,378**	**257,101**	**257,128**	**257,923**	**795**	**0.3%**	**-1,839**	**-0.7%**	**-0.1%**
REDC Region	*112,563*	*149,352*	*220,831*	*299,878*	*382,117*	*430,285*	*452,846*	*455,277*	*457,368*	*453,105*	*453,111*	*453,993*	*455,704*	*1,711*	*0.4%*	*427*	*0.1%*	*0.0%*
Hillsborough County	*156,987*	*178,161*	*223,941*	*276,608*	*336,073*	*380,841*	*400,721*	*400,940*	*403,288*	*400,950*	*400,797*	*401,585*	*402,606*	*1,021*	*0.3%*	*1,666*	*0.4%*	*0.1%*
Rockingham County	*70,059*	*98,065*	*138,950*	*190,345*	*245,845*	*277,359*	*295,223*	*295,525*	*297,734*	*295,123*	*295,608*	*296,594*	*297,626*	*1,032*	*0.3%*	*2,101*	*0.7%*	*0.1%*
New Hampshire	*529,880*	*606,787*	*737,681*	*920,475*	*1,109,252*	*1,235,550*	*1,316,470*	*1,315,000*	*1,324,575*	*1,317,208*	*1,318,000*	*1,321,000*	*1,323,262*	*2,262*	*0.2%*	*8,262*	*0.6%*	*0.1%*

Sources: U.S. Census and NH Office of Energy and Planning

Table A-2: Population History and Projections

Town/Area	OSP Projections-Fall 2013							Average Annual Growth Rates			
	2010	2015	2020	2025	2030	2035	2040	2010-2020	2020-2030	2030-2040	2010-2040
East Kingston	2,357	2,622	2,926	2,991	3,042	3,069	3,063	2.2%	0.4%	0.1%	0.9%
Exeter	14,306	14,169	14,187	14,499	14,751	14,879	14,851	-0.1%	0.4%	0.1%	0.1%
Greenland	3,549	3,666	3,829	3,913	3,981	4,015	4,008	0.8%	0.4%	0.1%	0.4%
Hampton	14,976	14,714	14,607	14,929	15,188	15,320	15,291	-0.2%	0.4%	0.1%	0.1%
Hampton Falls	2,236	2,386	2,568	2,625	2,670	2,694	2,689	1.4%	0.4%	0.1%	0.6%
Kensington	2,124	2,208	2,321	2,372	2,413	2,434	2,430	0.9%	0.4%	0.1%	0.4%
New Castle	968	927	895	915	930	939	937	-0.8%	0.4%	0.1%	-0.1%
Newfields	1,680	1,718	1,777	1,816	1,847	1,863	1,860	0.6%	0.4%	0.1%	0.3%
Newington	753	727	708	724	736	742	741	-0.6%	0.4%	0.1%	-0.1%
Newmarket	8,936	9,257	9,696	9,909	10,081	10,169	10,150	0.8%	0.4%	0.1%	0.4%
North Hampton	4,301	4,242	4,229	4,322	4,397	4,436	4,427	-0.2%	0.4%	0.1%	0.1%
Portsmouth	21,233	21,074	21,146	21,661	21,986	22,177	22,135	0.0%	0.4%	0.1%	0.1%
Rye	5,298	5,260	5,281	5,397	5,491	5,538	5,528	0.0%	0.4%	0.1%	0.1%
Seabrook	8,693	8,938	9,294	9,498	9,663	9,747	9,729	0.7%	0.4%	0.1%	0.4%
South Hampton	814	782	758	775	789	795	794	-0.7%	0.4%	0.1%	-0.1%
Stratham	7,255	7,603	8,051	8,228	8,371	8,444	8,428	1.0%	0.4%	0.1%	0.5%
CEDS Eastern Communities	*99,479*	*100,293*	*102,273*	*104,574*	*106,336*	*107,261*	*107,061*	*0.3%*	*0.4%*	*0.1%*	*0.2%*
Atkinson	6,751	6,932	7,199	7,358	7,485	7,551	7,536	0.6%	0.4%	0.1%	0.4%
Auburn	4,953	5,006	5,117	5,229	5,320	5,366	5,356	0.3%	0.4%	0.1%	0.3%
Brentwood	4,486	5,097	5,789	5,916	6,019	6,071	6,060	2.6%	0.4%	0.1%	1.0%
Candia	3,909	3,834	3,799	3,883	3,950	3,985	3,977	-0.3%	0.4%	0.1%	0.1%
Chester	4,768	5,204	5,717	5,842	5,944	5,996	5,984	1.8%	0.4%	0.1%	0.8%
Danville	4,387	4,500	4,669	4,772	4,855	4,897	4,888	0.6%	0.4%	0.1%	0.4%
Deerfield	4,280	4,524	4,828	4,935	5,020	5,064	5,054	1.2%	0.4%	0.1%	0.6%
Epping	6,411	6,794	7,269	7,429	7,558	7,624	7,609	1.3%	0.4%	0.1%	0.6%
Fremont	4,283	4,619	5,020	5,131	5,220	5,265	5,255	1.6%	0.4%	0.1%	0.7%
Hampstead	8,523	8,484	8,539	8,726	8,878	8,955	8,938	0.0%	0.4%	0.1%	0.2%
Kingston	6,025	5,999	6,040	6,173	6,280	6,334	6,322	0.0%	0.4%	0.1%	0.2%
Newton	4,603	4,685	4,824	4,930	5,016	5,059	5,050	0.5%	0.4%	0.1%	0.3%
Northwood	4,241	4,485	4,789	4,895	4,980	5,023	5,013	1.2%	0.4%	0.1%	0.6%
Nottingham	4,785	5,279	5,853	5,981	6,085	6,138	6,127	2.0%	0.4%	0.1%	0.8%
Plaistow	7,609	7,391	7,247	7,406	7,535	7,601	7,586	-0.5%	0.4%	0.1%	0.0%
Raymond	10,138	10,197	10,373	10,601	10,785	10,879	10,858	0.2%	0.4%	0.1%	0.2%
Sandown	5,986	6,328	6,754	6,903	7,023	7,084	7,070	1.2%	0.4%	0.1%	0.6%
CEDS Central Communities	*96,138*	*99,358*	*103,826*	*106,110*	*107,953*	*108,892*	*108,683*	*0.8%*	*0.4%*	*0.1%*	*0.4%*
Derry	33,109	31,991	31,189	31,876	32,429	32,711	32,649	-0.6%	0.4%	0.1%	0.0%
Hudson	24,467	24,925	25,653	26,196	26,608	26,824	26,831	0.5%	0.4%	0.1%	0.3%
Litchfield	8,271	8,634	9,097	9,290	9,436	9,512	9,515	1.0%	0.4%	0.1%	0.5%
Londonderry	24,129	24,154	24,453	24,991	25,425	25,646	25,598	0.1%	0.4%	0.1%	0.2%
Merrimack	25,494	25,317	25,393	25,930	26,338	26,552	26,559	0.0%	0.4%	0.1%	0.1%
Nashua	86,494	85,157	84,648	86,437	87,798	88,511	88,534	-0.2%	0.4%	0.1%	0.1%
Pelham	12,897	13,762	14,797	15,110	15,348	15,473	15,477	1.4%	0.4%	0.1%	0.6%
Salem	28,776	28,590	28,719	29,351	29,861	30,120	30,063	0.0%	0.4%	0.1%	0.1%
Windham	13,592	14,890	16,408	16,769	17,060	17,208	17,176	1.9%	0.4%	0.1%	0.8%
CEDS Western Communities	*257,229*	*257,420*	*260,357*	*265,950*	*270,303*	*272,557*	*272,402*	*0.1%*	*0.4%*	*0.1%*	*0.2%*
CEDS Region	*452,846*	*457,071*	*466,456*	*476,634*	*484,592*	*488,710*	*488,146*	*0.3%*	*0.4%*	*0.1%*	*0.3%*
Hillsborough County	*400,721*	*405,380*	*414,356*	*423,117*	*429,776*	*433,266*	*433,381*	*0.3%*	*0.4%*	*0.1%*	*0.3%*
Rockingham County	*295,223*	*299,277*	*306,867*	*313,619*	*319,065*	*321,840*	*321,226*	*0.4%*	*0.4%*	*0.1%*	*0.3%*
New Hampshire	*1,316,470*	*1,330,834*	*1,359,836*	*1,388,884*	*1,412,041*	*1,425,357*	*1,427,098*	*0.3%*	*0.4%*	*0.1%*	*0.3%*

Source: NH Office of Energy and Planning

Table A-3: Gender and Age – 2010 Census

2015 CEDS

Table A-3: Gender and Age - 2010 Census

Town/Area	Total Population	Male Popl.	Female Popl.	Age Under 5	Age 5-9	Age 10-14	Age 15-19	Age 20-24	Age 25-29	Age 30-34	Age 35-39	Age 40-44	Age 45-49	Age 50-54	Age 55-59	Age 60-64	Age 65-69	Age 70-74	Age 75-79	Age 80-84	Age 85+	Median Age	Age 20+	Age 65+	Percent <19	Percent 20-64	Percent 65+
East Kingston	2,357	1,151	1,206	114	169	185	142	91	78	77	139	202	239	125	153	180	159	97	67	28	22	44.6	1,657	373	26%	54%	16%
Exeter	14,306	6,722	7,584	689	925	1,009	883	570	607	661	855	1,095	1,267	1,241	1,022	873	645	466	436	467	595	44.3	10,800	2,609	25%	57%	18%
Greenland	3,549	1,731	1,818	200	216	254	230	121	132	166	230	298	374	336	250	240	172	148	68	55	59	43.8	2,649	502	25%	60%	14%
Hampton	15,430	7,693	7,737	605	722	835	823	797	712	733	814	1,168	1,339	1,482	1,357	1,236	924	661	524	344	349	47.0	12,440	2,802	19%	62%	18%
Hampton Falls	2,236	1,122	1,114	138	144	175	123	81	77	70	113	189	188	269	187	167	116	60	61	50	28	45.2	1,656	315	26%	60%	14%
Kensington	2,124	1,063	1,061	90	168	191	130	77	41	64	120	198	242	267	178	117	93	45	43	32	28	44.6	1,545	241	27%	61%	11%
New Castle	968	443	525	31	34	60	37	16	20	18	30	60	64	85	113	102	102	66	58	39	33	56.1	806	298	17%	52%	31%
Newfields	1,680	854	826	75	132	163	146	53	41	50	90	163	217	179	118	100	50	42	36	15	10	43.1	1,164	153	31%	60%	9%
Newington	753	371	382	27	27	41	51	39	36	22	39	58	64	91	72	66	41	31	27	10	11	48.0	607	120	19%	65%	16%
Newmarket	8,936	4,431	4,505	583	488	425	444	979	800	651	643	605	683	692	600	472	275	192	146	134	124	35.8	6,996	871	22%	69%	10%
North Hampton	4,301	2,102	2,199	142	288	305	252	156	105	136	187	370	410	436	416	369	270	176	146	90	67	47.9	3,334	749	22%	60%	17%
Portsmouth	20,779	10,080	10,699	975	1,012	930	805	1,318	2,102	1,660	1,473	1,458	1,586	1,479	1,412	1,264	893	630	665	536	581	40.3	17,057	3,305	18%	66%	16%
Rye	5,298	2,583	2,715	207	294	349	297	157	173	174	260	353	499	546	498	445	305	243	211	134	153	48.8	4,151	1,046	22%	59%	20%
Seabrook	8,693	4,325	4,368	454	408	445	502	497	459	423	532	688	713	743	657	647	482	341	317	215	170	44.6	6,884	1,525	21%	62%	18%
South Hampton	814	395	419	27	36	50	59	35	28	26	50	56	93	98	89	59	33	18	28	17	12	47.2	642	108	21%	66%	13%
Stratham	7,255	3,534	3,721	383	527	600	549	208	227	257	461	668	736	707	592	498	282	219	163	94	84	43.3	5,196	842	28%	60%	12%
CEDS Eastern Communities	**99,479**	**48,600**	**50,879**	**4,740**	**5,570**	**6,017**	**5,473**	**5,195**	**5,638**	**5,188**	**6,036**	**7,629**	**8,714**	**8,776**	**7,714**	**6,835**	**4,842**	**3,435**	**2,996**	**2,260**	**2,326**	**43.6**	**77,584**	**15,859**	**22%**	**62%**	**16%**
Atkinson	6,751	3,282	3,469	258	377	494	432	277	195	221	364	530	667	622	586	592	405	282	208	149	92	46.7	5,190	1,136	23%	60%	17%
Auburn	4,953	2,504	2,449	222	339	372	346	192	187	198	321	443	555	533	455	323	199	115	75	40	38	43.5	3,674	467	26%	65%	9%
Brentwood	4,486	2,309	2,177	211	342	413	347	206	155	171	306	444	440	357	286	208	138	108	82	112	160	41.4	3,173	600	29%	57%	13%
Candia	3,909	1,967	1,942	175	249	273	255	156	140	162	251	330	379	441	370	326	161	86	72	46	37	44.5	2,957	402	24%	65%	10%
Chester	4,768	2,393	2,375	194	354	441	461	294	150	169	270	442	550	460	338	285	153	98	56	32	21	40.6	3,318	360	30%	62%	8%
Danville	4,387	2,224	2,163	198	301	373	352	197	178	170	321	424	519	403	310	218	162	106	78	43	34	41.5	3,163	423	28%	62%	10%
Deerfield	4,280	2,110	2,170	251	260	304	291	171	201	202	315	368	455	401	356	285	184	103	58	40	35	42.0	3,174	420	26%	64%	10%
Epping	6,411	3,154	3,257	387	410	397	406	354	334	414	500	582	609	503	463	382	225	183	115	83	64	40.0	4,811	670	25%	65%	10%
Fremont	4,283	2,122	2,161	248	308	332	274	195	176	218	349	380	473	409	258	225	139	99	84	46	70	40.5	3,121	438	27%	63%	10%
Hampstead	8,523	4,220	4,303	373	508	587	644	401	291	311	410	621	907	892	709	657	453	307	225	144	83	45.7	6,411	1,212	25%	61%	14%
Kingston	6,025	2,965	3,060	290	355	389	380	310	309	258	356	502	602	596	511	403	268	201	116	98	81	43.7	4,611	764	23%	64%	13%
Newton	4,603	2,264	2,339	273	329	332	325	230	200	259	328	426	525	385	297	269	164	106	63	43	49	40.4	3,344	425	27%	63%	9%
Northwood	4,241	2,147	2,094	216	258	294	311	199	223	228	251	338	407	391	330	298	178	125	97	62	35	42.2	3,162	497	25%	63%	12%
Nottingham	4,785	2,422	2,363	323	334	323	269	198	208	295	399	416	478	410	404	315	186	94	70	36	27	40.5	3,536	413	26%	65%	9%
Plaistow	7,609	3,749	3,860	396	428	578	563	393	381	401	478	619	748	703	530	442	301	233	179	127	109	41.6	5,644	949	26%	62%	12%
Raymond	10,138	5,081	5,057	605	606	606	628	612	639	662	727	763	958	1,008	784	576	382	232	158	110	82	39.9	7,693	964	24%	66%	10%
Sandown	5,986	3,024	2,962	318	402	464	477	337	258	280	414	538	616	658	435	295	162	129	82	61	60	40.4	4,325	494	28%	64%	8%
CEDS Central Communities	**96,138**	**47,937**	**48,201**	**4,938**	**6,160**	**6,972**	**6,761**	**4,722**	**4,225**	**4,619**	**6,360**	**8,166**	**9,888**	**9,172**	**7,422**	**6,099**	**3,860**	**2,607**	**1,818**	**1,272**	**1,077**	**42.1**	**71,307**	**10,634**	**26%**	**63%**	**11%**
Derry	33,109	16,435	16,674	1,900	2,062	2,454	2,661	2,161	1,926	1,943	2,347	2,718	3,204	2,946	2,222	1,684	1,083	617	459	359	363	38.2	24,032	2,881	27%	64%	9%
Hudson	24,467	12,113	12,354	1,441	1,648	1,837	1,772	1,204	1,249	1,439	1,799	2,216	2,319	2,133	1,512	1,305	872	627	447	328	319	39.6	17,769	2,593	27%	62%	11%
Litchfield	8,271	4,141	4,130	442	634	740	679	385	300	364	573	813	878	710	541	518	296	185	98	74	41	40.1	5,776	694	30%	61%	8%
Londonderry	24,129	11,963	12,166	1,161	1,766	2,133	2,061	1,105	1,014	1,068	1,567	2,051	2,479	2,388	1,786	1,441	890	509	311	245	154	40.5	17,008	2,109	30%	62%	9%
Merrimack	25,494	12,685	12,809	1,368	1,716	1,878	1,807	1,185	1,260	1,469	1,791	2,049	2,525	2,399	1,757	1,652	1,048	668	410	304	208	40.0	18,725	2,638	27%	63%	10%
Nashua	86,494	42,661	43,833	5,472	5,235	5,018	5,642	5,836	6,050	5,789	5,989	6,343	7,075	6,666	5,683	4,627	3,280	2,350	2,052	1,693	1,604	38.5	65,037	10,979	25%	62%	13%
Pelham	12,897	6,429	6,468	729	951	1,073	906	582	516	606	935	1,184	1,363	1,193	793	708	473	337	251	166	131	40.7	9,238	1,358	28%	61%	11%
Salem	28,776	14,253	14,523	1,367	1,643	2,000	1,929	1,489	1,419	1,326	1,724	2,366	2,743	2,549	2,040	1,803	1,423	1,010	835	588	522	43.2	21,837	4,378	24%	61%	15%
Windham	13,592	6,698	6,894	877	1,132	1,123	925	474	344	542	938	1,184	1,343	1,225	1,002	920	599	341	251	177	195	41.8	9,535	1,563	30%	59%	11%
CEDS Western Communities	**257,229**	**127,378**	**129,851**	**14,757**	**16,787**	**18,256**	**18,382**	**14,421**	**14,078**	**14,546**	**17,663**	**20,924**	**23,929**	**22,209**	**17,336**	**14,658**	**9,964**	**6,644**	**5,114**	**3,934**	**3,537**	**39.8**	**188,957**	**29,193**	**27%**	**63%**	**11%**
CEDS Region	**452,846**	**223,915**	**228,931**	**24,435**	**28,517**	**31,245**	**30,616**	**24,338**	**23,941**	**24,353**	**30,059**	**36,719**	**42,531**	**40,157**	**32,472**	**27,592**	**18,666**	**12,686**	**9,928**	**7,466**	**6,940**	**41.1**	**337,848**	**55,686**	**27%**	**62%**	**12%**
Hillsborough County	400,721	198,163	202,559	23,824	25,588	27,716	27,145	24,253	24,657	24,441	26,881	30,698	35,267	33,209	27,074	22,441	15,045	10,515	8,325	6,794	6,848	39.3	296,448	47,527	27%	62%	12%
Rockingham County	295,223	145,886	149,337	14,983	18,333	20,699	19,810	15,146	14,571	14,686	18,972	24,414	28,371	27,146	22,186	18,782	12,697	8,519	6,670	4,901	4,637	42.2	221,398	37,424	25%	62%	13%
New Hampshire	1,316,470	649,394	667,076	69,806	77,756	84,620	93,620	84,546	73,121	71,351	82,152	97,026	113,564	112,397	96,289	81,954	57,176	39,586	31,774	24,971	24,761	41.4	990,668	178,268	25%	62%	14%

Source: 2010 U.S. Census

Table A-4: Race and Ethnic Origin – 2010 Census

Town/Area	Total Population	One Race	Two or More Races	White	Black	American Indian	Asian	Pacific Islander	Other Race	% White	% Black	% Asian	% All Other Races/more than race
East Kingston	2,357	2,336	21	2,308	3	1	17	0	7	97.9%	0.1%	0.7%	1.2%
Exeter	14,306	14,072	234	13,659	79	15	287	2	30	95.5%	0.6%	2.0%	2.0%
Greenland	3,549	3,504	45	3,403	22	3	63	3	10	95.9%	0.6%	1.8%	1.7%
Hampton	15,430	15,225	205	14,827	89	32	191	8	78	96.1%	0.6%	1.2%	2.1%
Hampton Falls	2,236	2,219	17	2,187	9	1	17	0	5	97.8%	0.4%	0.8%	1.0%
Kensington	2,124	2,110	14	2,071	7	4	19	5	4	97.5%	0.3%	0.9%	1.3%
New Castle	968	960	8	950	1	1	7	1	0	98.1%	0.1%	0.7%	1.0%
Newfields	1,680	1,670	10	1,638	6	2	17	0	17	97.5%	0.4%	1.0%	1.1%
Newington	753	744	9	725	4	1	10	0	4	96.3%	0.5%	1.3%	1.9%
Newmarket	8,936	8,770	166	8,238	90	21	358	9	54	92.2%	1.0%	4.0%	2.8%
North Hampton	4,301	4,263	38	4,175	19	8	55	1	5	97.1%	0.4%	1.3%	1.2%
Portsmouth	20,779	20,300	479	19,017	359	46	719	6	153	91.5%	1.7%	3.5%	3.3%
Rye	5,298	5,257	41	5,179	16	1	48	2	11	97.8%	0.3%	0.9%	1.0%
Seabrook	8,693	8,574	119	8,373	46	10	92	0	53	96.3%	0.5%	1.1%	2.1%
South Hampton	814	801	13	786	8	0	4	0	3	96.6%	1.0%	0.5%	2.0%
Stratham	7,255	7,165	90	6,994	11	7	138	5	10	96.4%	0.2%	1.9%	1.5%
CEDS Eastern Communities	*99,479*	*97,970*	*1,509*	*94,530*	*769*	*153*	*2,042*	*42*	*444*	*95.0%*	*0.8%*	*2.1%*	*2.1%*
Atkinson	6,751	6,701	50	6,583	34	3	64	1	63	97.5%	0.5%	0.9%	1.0%
Auburn	4,953	4,898	55	4,811	18	10	39	0	20	97.1%	0.4%	0.8%	1.7%
Brentwood	4,486	4,427	59	4,320	30	6	46	4	21	96.3%	0.7%	1.0%	2.0%
Candia	3,909	3,866	43	3,818	11	13	19	0	5	97.7%	0.3%	0.5%	1.6%
Chester	4,768	4,711	57	4,632	19	4	38	2	16	97.1%	0.4%	0.8%	1.7%
Danville	4,387	4,304	83	4,241	28	8	13	2	16	96.7%	0.6%	0.3%	2.4%
Deerfield	4,280	4,234	46	4,197	10	4	14	0	9	98.1%	0.2%	0.3%	1.4%
Epping	6,411	6,306	105	6,168	22	13	82	2	19	96.2%	0.3%	1.3%	2.2%
Fremont	4,283	4,217	66	4,178	9	6	11	0	13	97.5%	0.2%	0.3%	2.0%
Hampstead	8,523	8,436	87	8,320	23	7	70	1	15	97.6%	0.3%	0.8%	1.3%
Kingston	6,025	5,935	90	5,846	20	16	26	8	19	97.0%	0.3%	0.4%	2.2%
Newton	4,603	4,532	41	4,503	14	11	19	0	15	97.8%	0.3%	0.4%	1.5%
Northwood	4,241	4,195	46	4,131	17	13	30	0	4	97.4%	0.4%	0.7%	1.5%
Nottingham	4,785	4,733	52	4,637	20	15	51	0	10	96.9%	0.4%	1.1%	1.6%
Plaistow	7,609	7,562	47	7,426	42	13	45	0	36	97.6%	0.6%	0.6%	1.3%
Raymond	10,138	10,001	137	9,837	68	17	60	1	18	97.0%	0.7%	0.6%	1.7%
Sandown	5,986	5,925	61	5,848	18	7	18	1	33	97.7%	0.3%	0.3%	1.7%
CEDS Central Communities	*96,138*	*94,983*	*1,125*	*93,496*	*403*	*166*	*645*	*22*	*332*	*97.3%*	*0.4%*	*0.7%*	*1.7%*
Derry	33,109	32,538	571	31,301	326	80	513	12	306	94.5%	1.0%	1.5%	2.9%
Hudson	24,467	24,076	391	22,750	331	33	745	6	211	93.0%	1.4%	3.0%	2.6%
Litchfield	8,271	8,173	98	7,973	59	30	70	1	40	96.4%	0.7%	0.8%	2.0%
Londonderry	24,129	23,834	295	23,113	180	19	418	7	97	95.8%	0.7%	1.7%	1.7%
Merrimack	25,494	25,090	404	24,230	192	46	499	4	119	95.0%	0.8%	2.0%	2.2%
Nashua	86,494	84,312	2,182	72,120	2,346	249	5,626	26	3,945	83.4%	2.7%	6.5%	7.4%
Pelham	12,897	12,768	129	12,387	74	18	225	1	63	96.0%	0.6%	1.7%	1.6%
Salem	28,776	28,366	410	26,592	259	42	933	9	531	92.4%	0.9%	3.2%	3.4%
Windham	13,592	13,448	144	12,934	59	26	392	8	29	95.2%	0.4%	2.9%	1.5%
CEDS Western Communities	*257,229*	*252,605*	*4,624*	*233,400*	*3,826*	*543*	*9,421*	*74*	*5,341*	*90.7%*	*1.5%*	*3.7%*	*4.1%*
CEDS Region	*452,846*	*445,558*	*7,258*	*421,426*	*4,998*	*862*	*12,108*	*138*	*6,117*	*93.1%*	*1.1%*	*2.7%*	*3.2%*
Hillsborough County	*400,721*	*392,782*	*7,939*	*362,153*	*8,298*	*961*	*12,954*	*140*	*8,276*	*90.4%*	*2.1%*	*3.2%*	*4.3%*
Rockingham County	*295,223*	*291,169*	*4,054*	*281,966*	*1,996*	*486*	*4,943*	*100*	*1,678*	*95.5%*	*0.7%*	*1.7%*	*2.1%*
New Hampshire	*1,316,470*	*1,295,088*	*21,382*	*1,236,050*	*15,035*	*3,150*	*28,407*	*384*	*12,062*	*93.9%*	*1.1%*	*2.2%*	*2.8%*

Source: U.S. Census Bureau

Comprehensive Economic Development Strategy 2015

Table B-1: Housing Units – Census Counts and Housing Estimates

	Housing Units (U.S. Census counts)		Avg. Annual Growth Rate	ACS Housing Estimates								
				Housing Counts			Number Occupied Units			Number Vacant Units		
TOWN/AREA	2000	2010	'00-'10	2011	2012	2013	2011	2012	2013	2011	2012	2013
East Kingston	648	907	3.4%	901	893	942	870	859	987	31	34	45
Exeter	6,107	6,496	0.6%	6,527	6,472	6,449	6,182	6,128	6,146	345	344	303
Greenland	1,244	1,443	1.5%	1,375	1,459	1,489	1,355	1,409	1,435	20	50	54
Hampton	9,349	9,921	0.6%	9,652	9,556	9,554	6,922	6,744	6,709	2,730	2,812	2,845
Hampton Falls	729	900	2.1%	878	912	931	835	862	900	43	50	31
Kensington	672	806	1.8%	794	826	857	741	776	783	53	50	74
New Castle	488	537	1.0%	508	570	557	428	469	456	80	101	101
Newfields	532	591	1.1%	603	570	577	594	561	577	9	9	0
Newington	305	322	0.5%	305	310	351	283	278	318	22	32	33
Newmarket	3,457	4,139	1.8%	3,890	3,875	3,917	3,688	3,693	3,697	202	182	220
North Hampton	1,782	1,914	0.7%	1,890	1,931	1,901	1,764	1,801	1,776	126	130	125
Portsmouth	10,186	10,625	0.4%	10,757	11,451	11,001	9,992	10,425	10,157	765	1,026	844
Rye	2,645	2,852	0.8%	2,811	2,847	2,830	2,299	2,281	2,244	512	566	586
Seabrook	4,066	4,544	1.1%	4,693	4,599	4,585	3,905	3,856	3,907	788	743	678
South Hampton	308	504	5.0%	365	389	431	289	287	291	76	102	140
Stratham	2,371	2,864	1.9%	2,777	2,817	2,765	2,673	2,727	2,682	104	90	83
CEDS Eastern Communities	*44,889*	*49,365*	*1.0%*	*48,726*	*49,477*	*49,137*	*42,820*	*43,156*	*43,065*	*5,906*	*6,321*	*6,162*
Atkinson	2,431	2,788	1.4%	2,813	2,728	2,748	2,642	2,568	2,553	171	160	195
Auburn	1,622	1,814	1.1%	1,863	1,914	1,858	1,705	1,749	1,758	158	165	100
Brentwood	920	1,350	3.9%	1,217	1,247	1,317	1,217	1,247	1,317	0	0	0
Candia	1,384	1,494	0.8%	1,482	1,491	1,486	1,448	1,460	1,432	34	31	54
Chester	1,247	1,596	2.5%	1,621	1,659	1,671	1,551	1,618	1,643	70	41	28
Danville	1,479	1,684	1.3%	1,637	1,647	1,641	1,545	1,537	1,544	92	110	97
Deerfield	1,406	1,743	2.2%	1,682	1,693	1,661	1,487	1,545	1,533	195	148	128
Epping	2,215	2,723	2.1%	2,889	2,971	2,888	2,487	2,532	2,545	402	439	343
Fremont	1,201	1,573	2.7%	1,581	1,599	1,604	1,486	1,526	1,565	95	73	39
Hampstead	3,276	3,727	1.3%	3,650	3,668	3,657	3,387	3,415	3,434	263	253	223
Kingston	2,265	2,480	0.9%	2,419	2,466	2,582	2,281	2,321	2,397	138	145	185
Newton	1,552	1,751	1.2%	1,708	1,698	1,783	1,679	1,664	1,743	29	34	40
Northwood	1,905	2,129	1.1%	2,209	2,240	2,127	1,753	1,766	1,705	456	474	422
Nottingham	1,592	1,986	2.2%	2,039	2,091	2,155	1,750	1,785	1,787	289	306	368
Plaistow	2,927	3,016	0.3%	3,195	3,074	2,899	3,016	2,878	2,812	179	196	87
Raymond	3,710	4,254	1.4%	4,185	4,145	4,193	3,893	3,878	3,945	292	267	248
Sandown	1,777	2,214	2.2%	1,924	2,034	2,135	1,924	1,959	2,061	0	75	74
CEDS Central Communities	*32,909*	*38,322*	*1.5%*	*38,114*	*38,365*	*38,405*	*35,251*	*35,448*	*35,774*	*2,863*	*2,917*	*2,631*
Derry	12,735	13,277	0.4%	13,481	13,397	13,546	12,773	12,886	12,987	708	511	559
Hudson	8,165	9,212	1.2%	9,064	9,040	9,174	8,808	8,736	8,822	256	304	352
Litchfield	2,389	2,912	2.0%	2,873	2,806	2,842	2,730	2,667	2,712	143	139	130
Londonderry	7,718	8,771	1.3%	8,846	8,843	8,847	8,507	8,456	8,496	339	387	351
Merrimack	8,959	9,818	0.9%	9,754	10,139	10,026	9,421	9,763	9,708	333	376	318
Nashua	35,387	37,168	0.5%	37,422	37,392	37,089	35,220	35,209	34,778	2,202	2,183	2,311
Pelham	3,740	4,598	2.1%	4,364	4,413	4,595	4,275	4,288	4,437	89	125	158
Salem	10,866	11,810	0.8%	11,984	11,920	11,866	11,194	11,219	11,143	790	701	723
Windham	3,906	5,164	2.8%	4,989	5,051	5,125	4,560	4,717	4,887	429	334	238
CEDS Western Communities	*93,865*	*102,730*	*0.9%*	*102,777*	*103,001*	*103,110*	*97,488*	*97,941*	*97,970*	*5,289*	*5,060*	*5,140*
REDC CEDS Region	*171,663*	*190,417*	*1.0%*	*189,617*	*190,843*	*190,652*	*175,559*	*176,545*	*176,809*	*14,058*	*14,298*	*13,933*
Hillsborough County	*149,961*	*166,053*	*1.0%*	*165,465*	*165,960*	*166,322*	*153,471*	*153,747*	*154,324*	*11,994*	*12,213*	*11,988*
Rockingham County	*113,023*	*126,709*	*1.1%*	*126,140*	*126,644*	*126,926*	*115,105*	*115,552*	*116,262*	*11,035*	*11,092*	*10,664*
State of NH	*546,524*	*614,754*	*1.2%*	*611,916*	*613,995*	*615,204*	*514,869*	*516,845*	*518,245*	*97,047*	*97,150*	*96,959*

Sources: U.S. Census and American Community Survey 5-year data

Table B-7: Foreclosure Data

Town/Area	Number of Foreclosures						Year-to-Year Change		5-Year Change	
	2009	2010	2011	2012	2013	2014	2013-2014	% change	2009-2014	% change
East Kingston	7	8	2	3	8	0	-8	-100%	-7	-100%
Exeter	21	25	34	29	29	18	-11	-38%	-3	-14%
Greenland	6	6	3	4	0	4	4	100%	-2	-33%
Hampton	32	46	32	25	12	14	2	17%	-18	-56%
Hampton Falls	3	3	4	4	0	2	2	100%	-1	-33%
Kensington	3	8	3	5	3	0	-3	-100%	-3	-100%
New Castle	0	0	0	0	0	0	0	0%	0	0%
Newfields	1	0	0	2	2	1	-1	-50%	0	0%
Newington	1	2	0	0	0	0	0	0%	-1	-100%
Newmarket	15	27	17	17	13	8	-5	-38%	-7	-47%
North Hampton	10	8	5	10	4	5	1	25%	-5	-50%
Portsmouth	18	17	17	16	8	12	4	50%	-6	-33%
Rye	5	4	6	2	2	1	-1	-50%	-4	-80%
Seabrook	20	19	20	16	13	4	-9	-69%	-16	-80%
South Hampton	2	0	1	3	0	1	1	100%	-1	-50%
Stratham	12	8	8	12	8	12	4	50%	0	0%
CEDS Eastern Communities	*156*	*181*	*152*	*148*	*102*	*82*	*-20*	*-20%*	*-74*	*-47%*
Atkinson	11	14	9	7	6	6	0	0%	-5	-45%
Auburn	7	10	10	11	9	8	-1	-11%	1	14%
Brentwood	11	12	8	8	5	7	2	40%	-4	-36%
Candia	10	10	8	6	12	4	-8	-67%	-6	-60%
Chester	9	14	8	15	7	6	-1	-14%	-3	-33%
Danville	11	13	9	18	16	6	-10	-63%	-5	-45%
Deerfield	16	21	13	12	9	9	0	0%	-7	-44%
Epping	16	29	17	22	13	13	0	0%	-3	-19%
Fremont	15	17	17	16	10	14	4	40%	-1	-7%
Hampstead	9	19	19	25	11	10	-1	-9%	1	11%
Kingston	15	17	22	17	9	12	3	33%	-3	-20%
Newton	14	23	10	16	10	11	1	10%	-3	-21%
Northwood	24	19	20	18	15	13	-2	-13%	-11	-46%
Nottingham	13	18	12	16	13	9	-4	-31%	-4	-31%
Plaistow	17	27	25	23	17	10	-7	-41%	-7	-41%
Raymond	51	51	43	37	30	27	-3	-10%	-24	-47%
Sandown	29	29	23	19	18	14	-4	-22%	-15	-52%
CEDS Central Communities	*278*	*343*	*273*	*286*	*210*	*179*	*-31*	*-15%*	*-99*	*-36%*
Derry	112	122	106	130	99	51	-48	-48%	-61	-54%
Hudson	70	73	37	26	47	32	-15	-32%	-38	-54%
Litchfield	15	14	9	23	8	4	-4	-50%	-11	-73%
Londonderry	51	82	69	50	40	35	-5	-13%	-16	-31%
Merrimack	82	79	63	87	52	43	-9	-17%	-39	-48%
Nashua	190	225	166	204	130	97	-33	-25%	-93	-49%
Pelham	21	28	24	23	18	8	-10	-56%	-13	-62%
Salem	65	69	65	79	40	22	-18	-45%	-43	-66%
Windham	24	23	17	15	116	10	-106	-91%	-14	-58%
CEDS Western Communities	*630*	*715*	*556*	*637*	*550*	*302*	*-248*	*-45%*	*-328*	*-52%*
REDC CEDS Region	*1064*	*1239*	*981*	*1071*	*862*	*563*	*-299*	*-35%*	*-501*	*-47%*
Hillsborough County	*1044*	*1172*	*933*	*1078*	*766*	*500*	*-266*	*-35%*	*-544*	*-52%*
Rockingham County	*686*	*820*	*680*	*710*	*507*	*392*	*-115*	*-23%*	*-294*	*-43%*
New Hampshire	*3467*	*3953*	*3146*	*3768*	*2796*	*2074*	*-722*	*-26%*	*-1393*	*-40%*

Source: Real Data (www.real-data.com)

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
Busby Construction Co., Inc.	Atkinson	65	General Contractor
Busby Construction	Atkinson	70	Contractor
Lewis Builders, Inc.	Atkinson	80	Builder
Lewis Builders Development Inc.	Atkinson	82	General Contractor
Palmer Gas/Ermer Oil	Atkinson	82	Propane gas
GEX, Inc.	Atkinson	101	Graphics, printing
Atkinson Concessions	Atkinson	229	Country club
Atkinson Resort & Country Club	Atkinson		Conference Facility
SFC Engineering Partnership, Inc.	Auburn	13	Engineering Firm
Stantec Inc.	Auburn	34	Site Investigation/Remediation, etc.
T. Buck Construction Inc.	Auburn		Largest Public Works Contracts in FY 2014
Brentwood Machinery & Tools	Brentwood	14	Tool sales
Difeo Oil Co., Inc.	Brentwood	25	Fuel oil, propane
Highland Hardwoods	Brentwood	28	Specialty lumber
Stratham Tire	Brentwood	30	Tire warehouse, retail sales & headquarters
United Machine & Tool Design	Brentwood	39	Machine shop
RTH Mechanical Contractors Inc.	Brentwood	50	Mechanical Contractor
Bayside Distribution	Brentwood	65	Beer distributor
Northern Elastomeric Inc.	Brentwood	115	Asphalt commercial roofing
The Provider Enterprises, Inc.	Brentwood	115	Student transportation
Rockingham County Rehabilitation & Nursing Center and County Jail	Brentwood	690	Nursing home & correctional facility
Rockingham County Court House	Brentwood	100+	County courthouse & registry of deeds
Reinforced Plastics	Danville	5	Fiberglass feeders
CZ Machine Shop	Danville	6	Job machine
Post Woodworking	Danville	12	Utility buildings
Danville Chenille Co., Inc.	Danville	15	Chenille thread, floss, tinsel
Allen Datagraph	Derry	34	Manufacturing short run label production equipment
Betley Chevrolet	Derry	48	Chevrolet Dealership
Parkland Medical Center	Derry	600	Acute Care Hospital
East Coast Lumber Building Supply Company	East Hampstead	91	Building supply company
RAM Printing Inc.	East Hampstead	n/a	Offset printing, mail house, large format graphics
Abenaki Timber	Epping	16	Lumber, timber
Wendy's	Epping	22	Fast food restaurant
Burger King	Epping	25	Fast food restaurant
ERRCO	Epping	30	Demolition recycling
McDonald's	Epping	65	Fast food restaurant
Lowe's	Epping	135	Home improvement center
Epping Elementary and High Schools	Epping	210	Education
Wal-Mart	Epping	317	Retail store, supermarket
Market Basket	Epping	400	Supermarket
Digital Prospectors Corporation	Exeter	17	Consulting firm specializing in placing highly qualified IT and engineering professionals
Hampton Inn & Suites Exeter	Exeter	25	Hotel and Lodging Facility
Foss Motors Inc.	Exeter	40	Auto dealer
Palmer & Sicard	Exeter	70	Mechanical Contractor
McFarland Ford Sales Inc.	Exeter	73	Auto dealer
Town of Exeter	Exeter	150	Municipal services
Sig Sauer, Inc.	Exeter	200	Handguns
Osram Sylvania	Exeter	318	Electronics
Cobham	Exeter	370	Electronics

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
Cobham Antenna Systems-Continental Microwave & Tool Co. Inc.	Exeter	400	Manufacturer of microwave communications components
RiverWoods Retirement Community	Exeter	475	Continuing care retirement community
Riverwoods at Exeter	Exeter	500	Elderly housing, health care
Philips Exeter Academy	Exeter	520	Education
Exeter Hospital	Exeter	900	Health care services
Exeter Hospital	Exeter	1,371	Acute care hospital/Ortho/Cancer/Maternity
Core Physicians LLC	Exeter		Medical
Langdon Place of Exeter	Exeter		Residential care facility
Phillips Exeter Academy	Exeter		Private high school
Fremont Engineering Inc.	Fremont	4	Machine parts
Collins Pattern & Mold	Fremont	6	Foundry patterns
Fremont Pizzeria	Fremont	14	Restaurant
KTM Properties, LLC	Fremont	25	Construction
United Machine & Tool Design	Fremont	48	General tool & die
Fremont Animal Hospital	Fremont	10+	Veterinarian
Action Auto Body & Service	Fremont	3+	Automotive repair, body work
Fremont Welding & Towing	Fremont		General welding
Schreiber's Collision & Restoration Center	Fremont		Automotive repair
Advanced Concrete Technologies	Greenland	30	U.S. Headquarters
Target	Greenland	100	Department store
Lowe's	Greenland	100	Home improvement center
Nike/Baur	Greenland	200+/-	Warehouse/sporting goods
Anson Sailmakers	Greenland		Sail manufacturer
High Flying Flag Co.	Greenland		Flags, banners
Novel Iron Works	Greenland		Structural steel fabrication
Boise Cascade Building Materials	Greenland		Lumber mill
MicroArts Creative Agency	Greenland		Graphic design
East Coast Lumber	Hampstead	35	Lumber sales
Consolidated Plastechs	Hampstead	38	Plastic injection molding
Hampstead Hospital	Hampstead	130	Psychiatric care, services
Hampstead Hospital	Hampstead		Psychiatric hospital
The Granite Rose	Hampstead		Conference facility
Hannaford Brothers	Hampstead		Supermarket
Walgreens	Hampstead		Pharmacy
Blue Lobster Brewing Company	Hampton		Brewery
One Liberty Lane	Hampton		Conference facility
Partridge House	Hampton		Residential care facility
Perspecta Trust, LLC	Hampton		Trust company
Unitil Corporation	Hampton	375	Utility providing electric and gas service to New England & non-utility natural gas transmission
Ashworth by the Sea Hotel	Hampton		Conference facility
Dodge's Agway/Rockingham Feed & Supply	Hampton Falls	25	Farm and garden stores
SEMIKRON, Inc.	Hudson	55	Power semiconductors and solutions
Atrium Medical Corporation	Hudson	450	Manufacturer of medical products (angioplasty, drug delivery, stents, vascular grafts, etc.)
Exeter & Hampton Electric	Kensington	40	Electric utility services
James R. Rosencrantz & Sons	Kensington	15+	Farm, garden equipment
CP Building Supply, Inc.	Kensington		Building supplies & equipment
TD Bank	Kingston	12	Banking services
Northland Forest	Kingston	45	Lumber
Landscapers Depot	Kingston	50	Landscaping center

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Comprehensive Economic Development Strategy 2015

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
1686 Kingston House Restaurant	Kingston	60	Restaurant
Sears Logistics Services	Kingston	96	Warehouse, appliances
Safeway Training & Transportation Services Inc.	Kingston	140	Bus transportation services
Town of Kingston	Kingston	147	Municipal services
Sanborn Regional School District	Kingston	353	Education
Ford of Londonderry	Londonderry	60	Ford dealership
MTS Services	Londonderry	86	Communications cabling & audio visual systems
Stonyfield Farm Inc.	Londonderry	400	World's largest maker of organic yogurt, smoothies, cultured soy, and milk
Harvey Building Products	Londonderry	479	Manufacturer and distributor of building products
603 Brewery	Londonderry		Brewery
Continental Paving Inc.	Londonderry		Largest road & bridge contracts in FY 2014
Florence Electric	Merrimack	17	Electrical contractor
Tech NH Inc.	Merrimack	78	Specializing in plastic injection molding for medical electronics and industrial applications
GT Advanced Technologies	Merrimack	186	Technology company for global solar, LED, & electronics
Saint-Gobain Performance Plastics	Merrimack	250	Manufacturer of polymer-based engineered products and material systems
Anheuser-Busch Inc.	Merrimack	400	Brewery
PC Connection Inc.	Merrimack	1,049	Direct marketer of IT products/Provider of information technology products and services
Fidelity Investments	Merrimack	5,400	Financial services company
Merrimack Premium Outlets	Merrimack		Top valued commercial properties
The Thomas More College of Liberal Arts	Merrimack		College and/or graduate school
Saint Joseph Hospital	Nashua	1,100	Acute care hospital
Paradigm Computer Consulting Inc.	Nashua	21	Computer network service provider
Hayner/Swanson Inc.	Nashua	22	Engineering firm
Hampton Inn - Nashua	Nashua	25	Conference facility
New Horizons Computer Learning Center	Nashua	30	Microsoft Training, classroom, client site, and online training
Residence Inn by Marriott - Nashua	Nashua	30	Conference facility
The Stabile Companies	Nashua	32	General contractor
White Mountain Computer Company	Nashua	40	Full service computer hardware and network provider
Gate City Electric LLC	Nashua	42	Electrical contractor
iCAD Inc.	Nashua	45	Advanced image analysis & radiation therapy for early detection of cancer
Holiday Inn & Suites Nashua	Nashua	70	Hotels & lodging
J. Lawrence Hall Co Inc.	Nashua	71	Mechanical contractor
P.M. MacKay Group	Nashua	75	General contractor
Transparent Language Inc.	Nashua	95	Develops and markets language learning software
Lovering Volvo/Lovering Mitsubishi	Nashua	101	Auto dealer
GLV Inc.	Nashua	105	Manufacturer of machinery for paper, pulp industry and water treatment
Worthen Industries Inc.	Nashua	118	Manufacturer of industrial adhesives and coatings
Pfieffer Vacuum GmbH	Nashua	150	Sales, service and distribution of vacuum pumps, systems and accessories
Crowne Plaza Nashua	Nashua	160	Conference facility
General Dynamics Global Imaging Tech	Nashua	165	Manufacturer of thermal imaging cameras and equipment
MacMulkin Chevrolet-Cadillac	Nashua	175	Auto dealer
Amphenol TCS	Nashua	200	Provider of high-tech systems solutions
Radisson Hotel Nashua	Nashua	200	Hotels & lodging
Toyota of Nashua	Nashua	200	Toyota dealer
Delta Education LLC	Nashua	220	Educational publisher
Amphenol Printed Circuits	Nashua	250	Manufactures flexible circuits, offering fully assembled and tested systems
Benchmark Electronics	Nashua	429	Manufacturer of printed circuit assemblies and fully integrated products
Oracle Corporation	Nashua	523	Develops computer hardware systems and enterprise software
Target Stores	Nashua	1,464	Retail

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
Southern New Hampshire Medical Center	Nashua	2,269	Acute care hospital
BAE Systems	Nashua	4,500	Major producer of aircraft self-propelled systems, tactical surveillance, and intelligence systems for all armed forces
DeMoulas & Market Basket	Nashua	9,000	Supermarket
Courtyard by Marriott Nashua	Nashua		Conference facility
D.L. King & Associates Inc.	Nashua		Largest public works contracts in FY 2014
Daniel Webster College	Nashua		College and/or graduate school
Foundation Medical Partners	Nashua		Nonprofit
IncrediBREW	Nashua		Brewery
Martha's Exchange Restaurant & Brewing Co.	Nashua		Brewery
Nashua Crossings	Nashua		Residential care facility
Pennichuck Water Works	Nashua		Top valued commercial properties
Rivier University	Nashua		College and/or graduate school
Shroeder Construction Management Inc.	Nashua		Largest public works contracts in FY 2014
Sky Meadow Country Club	Nashua		Conference facility
St. Joseph Hospital Employees' Credit Union	Nashua		Credit union
State Street Bank and Trust Co of NH	Nashua		State chartered non-depository trust company
Sunnyside Acura	Nashua	72	Acura dealership
Wentworth By The Sea	New Castle		Conference facility
Stratham Tire	Newfields	5	Tire warehouse, retail sales
Conner Bottling Works	Newfields	5	Bottling company
Knipstein & Conner Enterprises	Newfields	14	Construction
Dunkin' Donuts	Newfields	15	Donut shop
Home Fashions Outlet	Newfields	15	Warehouse
Great Bay Camping	Newfields	16	Convenience store, camping
Coed Sportswear, Inc.	Newfields	60	Clothing manufacturer, distributor
Hutchinson Sealing Systems	Newfields	333	Designs/manufactures rubber and plastic sealing systems for auto, OEM, and other products
Hutchinson Automotive	Newfields	400	Automotive products
Windroc Vineyard	Newfields		Winery
Main Street Art	Newfields		Classes & gallery
Custom Pools	Newington	35	Pool installation, service
Rockingham Electrical Supply	Newington	40	Wholesale, retail lighting
Sprague Energy	Newington	65	Fuel storage
Georgia-Pacific	Newington	90	Gypsum board
Westinghouse Electric Co.	Newington	175	Water pumps
Tyco	Newington	200	Underwater cable manufacturing
Westinghouse Electric/Toshiba Corporation	Newington	310	Manufacturer of pumps for nuclear reactors and cylinders for spent fuel
The Crossings at Fox Run	Newington	500	Retail store
Fox Run Mall	Newington	600	Retail stores
SIG SAUER	Newington	600	Manufacturing
SIG SAUER Inc.	Newington	900	Firearms manufacturer
Sears at Fox Run Mall	Newington	1,200	Retailer of apparel, home and automotive products, and services
Essential Power	Newington		Top valued commercial properties
Fox Run Mall	Newington		Top valued commercial properties
Newington Station	Newington		Top valued commercial properties
The Pines of Newmarket	Newmarket		Residential care facility
Pro Design	Newton	4	Fiberglass forms
Newton Greenhouse	Newton	13	Wholesale florist
Ravensburger-FX Schmid, USA	Newton	25	Game puzzles
Continental Biomass Inc. (CBI)	Newton	64	Production machinery

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
Town of Newton	Newton	115	Municipal services
Lamprey Brothers	North Hampton	30	Fuel oil
Relco/Reilly Electrical Contractors Inc.	North Hampton	36	Electrical contractor
Town of North Hampton	North Hampton	50	Municipal services
First Student	North Hampton	60	Bus service
Throwback Brewery	North Hampton		Brewery
Home Depot	North Hampton		Home improvement center
Shaw's Supermarket	North Hampton		Supermarket
Marshall's	North Hampton		Department store
Rite Aid	Plaistow	25	Pharmacy
CVS	Plaistow	35	Pharmacy
Scandia Plastics	Plaistow	47	Custom plastic extrusions
T J Maxx	Plaistow	55	Department store
Kohl's	Plaistow	115	Department store
Shaw's Supermarket	Plaistow	125	Supermarket
Home Depot	Plaistow	165	Home improvement center
Wal-Mart	Plaistow	190	Retail store
Market Basket	Plaistow	401	Supermarket
Timberlane Regional School District	Plaistow	1,177	Education
Ransom Consulting Inc.	Portsmouth	11	Engineering firm
TMS Architects	Portsmouth	16	Architecture
Tighe & Bond Inc.	Portsmouth	22	Engineering firm
Wright-Pierce	Portsmouth	22	Engineering firm
Dowling Corporation	Portsmouth	24	Mechanical contractor
Brueckner Group USA Inc.	Portsmouth	27	North American sales of machines for plastics processing
JSA Inc.	Portsmouth	38	Architecture
Adaptive Communications	Portsmouth	39	Value-added reseller of network connectivity, information security and data storage solutions
Comfort Inn Portsmouth	Portsmouth	40	Hotel and lodging facility
Best Western Plus Wynwood Hotel & Suites	Portsmouth	45	Hotel and lodging facility
Bournival Inc.	Portsmouth	48	Auto dealer
PixelMEDIA Inc.	Portsmouth	61	Digital agency that creates value for organizations by delivering internet and mobile solutions
Willis of New Hampshire	Portsmouth	70	Insurance programs for 30+ industries
Sheraton Portsmouth Harborside Hotel	Portsmouth	125	Conference facility
Seacoast Media Group	Portsmouth	130	Newspapers and website
High Liner Foods USA Inc.	Portsmouth	162	Manufacturer of processed foods
Sprague Energy	Portsmouth	235	Oil energy terminal
Thermo Fisher	Portsmouth	274	Analytical instruments & laboratory equipment
Newmarket International Inc.	Portsmouth	305	Event software
Bottomline Technologies	Portsmouth	380	Finance software
Bottomline Technologies Inc.	Portsmouth	400	Provides cloud-based payment, invoice & banking solutions around the world
John Hancock	Portsmouth	400	Financial services
Thermo Fisher Scientific	Portsmouth	623	Provider of supplies, instruments and consumables for scientific researchers and clinicians
Lonza Biologics Inc.	Portsmouth	772	Manufacturer of therapeutic monoclonal antibodies and recombinant proteins from cell cultures
Lonza Biologics	Portsmouth	792	Contract pharmaceuticals
City of Portsmouth	Portsmouth	975	Municipal services
HCA Portsmouth Regional Hospital	Portsmouth	980	Health care services
Liberty Mutual Insurance	Portsmouth	1,013	Insurance services
Portsmouth Regional Hospital	Portsmouth	1,200	Acute care hospital women's services/ Cardiology/Neurosurgery/Psychiatric/Ortho

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
National Regional Passport Center, Bureau of Consular Affairs	Portsmouth	1,459	Passport, visa services
Fairfield Inn Portsmouth Seacoast	Portsmouth	n/a	Hotel and lodging facility
Hilton Garden Inn Portsmouth Downtown	Portsmouth	n/a	Hotel and lodging facility
Homewood Suites by Hilton Portsmouth	Portsmouth	n/a	Hotel and lodging facility
Careno Construction Co LLC	Portsmouth		Largest public works contracts in FY 2014
Earth Eagle Brewings	Portsmouth		Brewery
Great Bay Community College	Portsmouth		College and/or graduate school
Great Rhythm Brewing Co.	Portsmouth		Brewery
Mark Wentworth Home	Portsmouth		Residential care facility
Northeast Credit Union	Portsmouth		Credit union
PENSCO Trust Company, LLC	Portsmouth		Trust company
Portsmouth Brewery	Portsmouth		Brewery
Redhook Brewery	Portsmouth		Brewery
Schiller Station	Portsmouth		Top valued commercial properties
Service Credit Union	Portsmouth		Credit union
Smuttynose Brewing Co.	Portsmouth		Brewery
The Frank Jones Center	Portsmouth		Conference facility
Town of Rye	Rye	61	Municipal services
Petey's Restaurant	Rye		Seasonal restaurant
Rye Airfield	Rye		Skate park & BMX bikes
Wentworth by the Sea Country Club	Rye		Golf course
Ice House (seasonal)	Rye		Restaurant
TD Bank	Rye		Banking services
Rye Public Schools	Rye		Education
Sagamore Veterinary Clinic	Rye		Animal health care services
Abenaqui Country Club	Rye		Golf course
Webster at Rye	Rye		Rehabilitation & assisted living
ProPhotonix Limited	Salem	5	Designs and manufactures LED illumination solutions and laser modules
MHF Design Consultants Inc.	Salem	12	Engineering firm
Access Manufacturing Systems Inc.	Salem	15	Sells, supports, and trains manufacturing sector on CAM software
Liberty Electric Inc.	Salem	18	Electrical contractor
Blackdog Builders Inc.	Salem	23	General contractor
Standex International Corp.	Salem	34	Manufactures a variety of products and services for diverse market segments
Scott Electronics Inc.	Salem	100	Contract manufacturing; cables, harness, and fiber optic assembles
The Home Depot	Salem	100	Home improvement center
Salemhaven, Inc.	Salem	120	Elderly home
Reliable Security Guard Agency	Salem	135	Security guard services
J.C. Penny	Salem	200	Retail store
Northeast Rehabilitation Hospital	Salem	300	Comprehensive physical rehabilitation
Extreme Networks	Salem	600	Global networking company
Northeast Rehabilitation Hospital	Salem	1,000	Rehabilitation Hospital
Bank of New England	Salem		Bank
Border Brew Supply	Salem		Brewery
DWS Trust Company	Salem		Trust company
Fidelity Non-Profit Management Foundation	Salem		Financial services company
Greystone Farm at Salem	Salem		Residential care facility
Mall at Rockingham Park	Salem		Top valued commercial properties
Pryamis Global Advisors Trust Company	Salem		State chartered non-depository trust company
Rockingham Park	Salem		Conference facility
Salem Cooperative Bank	Salem		Bank

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-1: Inventory of Regional Employers

Company Name	Town/City	Number of Employees	Business Type
All Japanese Import Auto	Sandown	4	Automotive repair/service
Angle Pond Grove Camping & Rec Area	Sandown	5	Camping & picnicking
Main Street Friends	Sandown	5	Childcare center
Compliance Worldwide, Inc.	Sandown	7	EMC test lab
Sue Padden Real Estate	Sandown	13	Real estate agency
Playmates Learning Center	Sandown	14	Childcare center
Fox Den Retirement Community	Sandown	20	Assisted living facility
White Oaks Farm/St. Julien Macaroons	Sandown		Cookie factory
Zorvino Vineyards	Sandown		Winery
Zorvino Vineyards	Sandown		Vineyard & function facility
Chickadee Hill Cakes	Sandown		Specialty cake shop
Richardson Electrical Co Inc.	Seabrook	25	Electrical Contractor
Waterline Industries Corporation	Seabrook	66	General Contractor
DG O'Brien	Seabrook	110	Underwater electrical connections
Henkel Loctite	Seabrook	116	Adhesive manufacturing
Sam's Club	Seabrook	130	Wholesale warehouse
Wal-Mart	Seabrook	220	Retail store
NextEra	Seabrook	1,000	Electric utility services
Seabrook Station	Seabrook		Top valued commercial properties
Home Depot	Seabrook		Home improvement center
Lowe's	Seabrook		Home improvement center
Jewell Towne Vineyards	South Hampton		Winery
HD Smith	Stratham	25	Distributor
Staples	Stratham	25	Retail office products, services
Seacoast Imported Auto, Inc.	Stratham	35	Vehicle dealership
AutoFair/Nissan of Stratham	Stratham	35	Car dealership, sales, and service
Bell & Flynn	Stratham	44	Sand, gravel, construction
Bauer Performance Sports	Stratham	50	Retail sports equipment
Shaw's Supermarket	Stratham	143	Supermarket
Market Basket	Stratham	150	Supermarket
Lindt Sprungli, Inc.	Stratham	250	Chocolate manufacturer
Lindt & Sprungli	Stratham	465	Premium chocolate manufacturing, retail, wholesale
The Timberland Co.	Stratham	477	Distributes and sells premium-quality footwear, apparel, and accessories for men, women, and children
Timberland	Stratham	650	Retail outdoor sport equipment, catalog
Shaw's Supermarkets Inc.	Stratham	2,900	Supermarket
The Dubay Group Inc.	Windham	10	Engineering firm

Note: Major employer information was collected from the NH Department of Employment Security Community Profiles and the New Hampshire Business Review Publication 'Book of Lists:2015'

Table C-2: Employment and Wages for Hillsborough County

NAICS Code	Industry	Hillsborough County 2011			Hillsborough County 2012			Hillsborough County 2013		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
ALL	**Total, Private plus Government**	**11,094**	**186,437**	**$1,014.00**	**11,245**	**188,425**	**$1,030.00**	**11,257**	**190,568**	**$1,039**
	Total Private	10,813	165,030	$1,019.00	10,961	167,133	$1,036.00	10,976	169,383	$1,045
101	**Goods Producing**	1,569	32,694	$1,330.00	1,557	31,642	$1,326.00	1,553	30,861	$1,365
11	**Agriculture, Forestry, Fishing and Hunting**	**24**	**136**	**$585.00**	**24**	**139**	**$559.00**	**25**	**145**	**$588**
111	Crop Production	10	71	$308.00	9	76	$296.00	10	82	$340
112	Animal Production	n	n	n	n	n	n	n	n	n
113	Forestry and Logging	10	50	$856.00	12	52	$821.00	12	50	$874
114	Fishing, Hunting, and Trapping	0	0	$0.00	0	0	$0.00	0	0	$0
115	Agriculture and Forestry support Activities	n	n	n	n	n	n	n	n	n
21	**Mining**	**7**	**38**	**$1,267.00**	**8**	**45**	**$1,241.00**	**9**	**57**	**$1,019**
211	Oil and Gas Extraction	0	0	$0.00	0	0	$0.00	0	0	$0
212	Mining, except Oil and Gas	7	38	$1,267.00	8	45	$1,241.00	9	57	$1,019
213	Support Activities for Mining	0	0	$0.00	0	0	$0.00	0	0	$0
23	**Construction**	**913**	**6,194**	**$1,004.00**	**912**	**6,150**	**$1,001.00**	**924**	**6,284**	**$1,063**
236	Construction of Buildings	232	1,363	$1,068.00	231	1,340	$1,049.00	233	1,307	$1,163
237	Heavy and Civil Engineering Construction	24	132	$1,053.00	22	275	$1,119.00	24	349	$1,218
238	Specialty Trade Contractors	657	4,519	$981.00	659	4,535	$980.00	668	4,628	$1,024
31-33	**Manufacturing**	**625**	**26,327**	**$1,410.00**	**614**	**25,309**	**$1,409.00**	**395**	**24,375**	**$1,449**
311	Food Manufacturing	25	409	$684.00	27	415	$626.00	30	409	$641
312	Beverage and Tobacco Product Manufacturing	5	328	$1,514.00	5	341	$1,449.00	5	385	$1,445
313	Textile Mills	9	557	$1,044.00	9	593	$1,045.00	9	626	$1,023
314	Textile Product Mills	10	83	$658.00	9	83	$650.00	8	73	$688
315	Apparel Manufacturing	848	45	$991.00	n	n	n	n	n	n
316	Leather and Allied Product Manufacturing	n	n	n	n	n	n	n	n	n
321	Wood Product Manufacturing	12	145	$848.00	12	163	$932.00	10	144	$968
322	Paper Manufacturing	9	744	$1,016.00	9	673	$1,082.00	9	611	$1,082
323	Printing and Related Support Activities	56	627	$856.00	57	615	$864.00	54	588	$842
324	Petroleum and Coal Products Manufacturing	n	n	n	n	n	n	n	n	n
325	Chemical Manufacturing	17	413	$1,126.00	17	397	$1,172.00	17	391	$1,294
326	Plastics and Rubber Products Manufacturing	38	2,028	$1,006.00	36	1,908	$1,003.00	35	1,909	$1,013
327	Nonmetallic Mineral Product Manufacturing	20	437	$960.00	20	395	$1,015.00	19	382	$998
331	Primary Metal Manufacturing	11	1,164	$989.00	11	1,176	$975.00	11	1,130	$997
332	Fabricated Metal Product Manufacturing	116	3,055	$1,045.00	114	3,094	$1,050.00	111	3,130	$1,063
333	Machinery Manufacturing	50	1,295	$1,876.00	51	1,214	$1,722.00	50	1,142	$1,986
334	Computer and Electronic Product Manufacturing	143	11,237	$1,749.00	136	10,505	$1,794.00	133	9,959	$1,852
335	Electrical Equipment and Appliances Manufacturing	19	1,564	$1,312.00	21	1,569	$1,423.00	19	1,453	$1,465
336	Transportation Equipment Manufacturing	9	228	$1,048.00	7	119	$1,349.00	6	98	$1,403
337	Furniture and Related Product Manufacturing	15	85	$707.00	13	82	$713.00	12	89	$677
339	Miscellaneous Manufacturing	54	1,880	$1,362.00	56	1,921	$1,144.00	55	1,835	$1,188
102	Service Providing	9,244	132,336	$942.00	9,404	135,492	$968.00	9,423	138,522	$974
22	**Utilities**	**16**	**367**	**$1,662.00**	**16**	**375**	**$1,632.00**	**16**	**389**	**$1,620**
221	Utilities	16	367	$1,662.00	16	375	$1,632.00	16	389	$1,620
42	**Wholesale Trade**	**953**	**7,187**	**$1,521.00**	**916**	**7,307**	**$1,593.00**	**882**	**7,263**	**$1,597**
423	Merchant Wholesalers, Durable Goods	302	4,152	$1,522.00	292	4,270	$1,609.00	303	4,276	$1,659
424	Merchant Wholesalers, Nondurable Goods	89	1,293	$1,000.00	84	1,250	$1,016.00	83	1,359	$966
425	Electronic Markets and Agents and Brokers	563	1,742	$1,905.00	540	1,788	$1,960.00	496	1,628	$1,961
44-45	**Retail Trade**	**1,429**	**26,513**	**$586.00**	**1,518**	**27,330**	**$598.00**	**1,551**	**28,043**	**$599**
441	Motor Vehicle and Parts Dealers	165	3,502	$946.00	168	3,612	$950.00	173	3,766	$989
442	Furniture and Home Furnishings Stores	68	755	$606.00	77	811	$634.00	78	289	$646
443	Electronics and Appliance Stores	103	1,709	$1,363.00	104	1,683	$1,531.00	97	1,623	$1,488
444	Building Material and Garden Supply Stores	133	2,125	$655.00	114	2,038	$657.00	112	2,118	$639
445	Food and Beverage Stores	154	5,752	$344.00	164	6,044	$346.00	168	6,217	$354
446	Health and Personal Care Stores	117	1,295	$556.00	127	1,343	$626.00	133	1,413	$619
447	Gasoline Stations	113	899	$396.00	133	861	$397.00	130	864	$405
448	Clothing and Clothing Accessories Stores	160	2,099	$337.00	206	2,655	$344.00	228	2,944	$353
451	Sporting Goods, Hobby, Book, and Music Stores	112	1,420	$383.00	112	1,426	$376.00	113	1,511	$383
452	General Merchandise Stores	53	4,085	$403.00	55	4,008	$400.00	59	3,871	$413
453	Miscellaneous Store Retailers	184	1,660	$414.00	185	1,666	$406.00	185	1,788	$412
454	Nonstore Retailers	69	1,213	$1,152.00	75	1,183	$1,235.00	77	1,098	$1,272
48-49	**Transportation and Warehousing**	**211**	**3,820**	**$782.00**	**213**	**3,759**	**$818.00**	**202**	**3,639**	**$808**
481	Air Transportation	19	316	$1,065.00	21	281	$1,127.00	19	253	$1,189
484	Truck Transportation	76	827	$796.00	78	749	$875.00	76	744	$878
485	Transit and Ground Passenger Transportation	31	699	$383.00	29	705	$379.00	27	725	$360
486	Pipeline Transportation	n	n	n	0	0	$0.00	0	0	$0
487	Scenic and Sightseeing Transportation	n	n	n	n	n	n	0	0	$0
488	Support Activities for Transportation	n	n	n	n	n	n	n	n	n
491	Postal Service	n	n	n	n	n	n	0	0	$0
492	Couriers and Messengers	n	n	n	n	n	n	n	n	n

Source: NH Economic and Labor Market Information Bureau

Comprehensive Economic Development Strategy 2015

Table C-2: Employment and Wages for Hillsborough County

NAICS Code	Industry	Hillsborough County 2011			Hillsborough County 2012			Hillsborough County 2013		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
51	**Information**	**202**	**5,204**	**$1,621.00**	**184**	**5,259**	**$1,624.00**	**182**	**5,119**	**$1,685**
511	Publishing Industries (except Internet)	83	2,500	$1,819.00	82	2,532	$1,920.00	84	2,432	$1,956
512	Motion Picture and Sound Recording	9	212	$914.00	11	319	$711.00	11	328	$797
515	Broadcasting (except Internet)	7	211	$1,128.00	7	215	$1,155.00	8	228	$1,205
517	Telecommunications	46	1,940	$1,538.00	40	1,854	$1,514.00	39	1,830	$1,591
518	Data Processing and Related Services	30	218	$1,242.00	20	228	$876.00	19	201	$807
519	Other Information Services	27	124	$1,644.00	25	112	$1,777.00	22	101	$2,564
52	**Finance and Insurance**	**613**	**9,393**	**$1,941.00**	**622**	**9,817**	**$2,006.00**	**613**	**10,067**	**$1,997**
522	Credit Intermediation and Related Activities	197	2,141	$1,118.00	210	2,185	$1,275.00	211	2,132	$1,228
523	Financial Investment and Related Activities	150	4,452	$2,540.00	156	4,922	$2,549.00	157	5,052	$2,533
524	Insurance Carriers and Related Activities	255	6,278	$1,612.00	245	2,578	$1,614.00	n	n	n
525	Funds, Trusts, and Other Financial Vehicles	11	122	$1,739.00	11	131	$1,465.00	n	n	n
53	**Real Estate and Rental and Leasing**	**358**	**2,316**	**$1,054.00**	**356**	**2,280**	**$942.00**	**350**	**2,369**	**$949**
531	Real Estate	294	1,758	$1,121.00	294	1,739	$954.00	291	1,774	$983
532	Rental and Leasing Services	62	549	$840.00	60	532	$900.00	n	n	n
533	Lessors of Nonfinancial Intangible Assets	3	8	$903.00	3	9	$913.00	n	n	n
54	**Professional and Technical Services**	**1,414**	**11,599**	**$1,603.00**	**1,431**	**11,711**	**$1,666.00**	**1,442**	**12,327**	**$1,662**
541	Professional and Technical Services	1,414	11,599	$1,603.00	1,431	11,711	$1,666.00	1,442	12,327	$1,662
5411	Legal Services	254	1,705	$1,518.00	259	1,635	$1,595.00	262	1,709	$1,600
5412	Accounting and Bookkeeping Services	160	1,885	$1,525.00	164	1,936	$1,626.00	170	1,876	$1,512
5413	Architectural and Engineering Services	196	1,885	$1,464.00	197	1,803	$1,513.00	197	1,895	$1,601
5414	Specialized Design Services	31	249	$1,181.00	28	252	$1,278.00	28	274	$1,306
5415	Computer Systems Design and Related Services	388	3,261	$2,050.00	400	3,466	$2,059.00	399	3,712	$2,067
5416	Management and Technical Consulting Services	205	928	$1,563.00	206	941	$1,584.00	209	1,015	$1,547
5417	Scientific Research and Development Services	38	585	$1,829.00	37	634	$1,893.00	36	743	$1,866
5418	Advertising, PR, and Related Services	50	403	$1,015.00	47	319	$1,067.00	52	372	$1,052
5419	Other Professional and Technical Services	93	699	$661.00	96	726	$735.00	91	731	$697
55	**Management of Companies/Enterprises**	**103**	**2,997**	**$1,316.00**	**126**	**3,171**	**$1,350.00**	**122**	**3,147**	**$1,354**
551	Management of Companies/Enterprises	103	2,997	$1,316.00	126	3,171	$1,350.00	122	3,147	$1,354
56	**Administrative and Waste Services**	**775**	**9,160**	**$639.00**	**806**	**9,861**	**$742.00**	**805**	**10,097**	**$740**
561	Administrative and Support Services	747	9,006	$637.00	779	9,691	$742.00	774	9,920	$739
5611	Office Administrative Services	111	589	$1,426.00	116	1,031	$1,966.00	122	1,016	$1,864
5612	Facilities Support Services	n	n	n	10	164	$425.00	9	157	$436
5613	Employment Services	95	3,396	$538.00	97	3,557	$541.00	97	3,552	$565
5614	Business Support Services	69	863	$653.00	70	863	$704.00	68	920	$710
5615	Travel Arrangement and Reservation Services	43	206	$927.00	52	196	$961.00	54	170	$958
5616	Investigation and Security Services	54	781	$837.00	50	795	$836.00	47	831	$866
5617	Services to Buildings and Dwellings	351	2,786	$516.00	374	2,926	$540.00	368	3,111	$544
5619	Other Support Services	n	n	n	12	159	$779.00	12	162	$846
562	Waste Management and Remediation Services	28	154	$790.00	27	170	$765.00	31	178	$777
61	**Educational Services**	**188**	**4,625**	**$728.00**	**184**	**4,539**	**$752.00**	**185**	**4,882**	**$771**
611	Educational Services	188	4,625	$728.00	184	4,539	$752.00	185	4,882	$771
62	**Health Care and Social Assistance**	**1,062**	**26,575**	**$927.00**	**1,064**	**26,551**	**$937.00**	**1,087**	**27,121**	**$943**
621	Ambulatory Health Care Services	690	9,436	$1,282.00	695	9,513	$1,319.00	718	9,736	$1,317
622	Hospitals	10	8,590	$950.00	12	8,430	$946.00	12	8,563	$945
623	Nursing and Residential Care Facilities	98	5,124	$552.00	100	5,291	$538.00	101	5,374	$555
624	Social Assistance	264	3,425	$451.00	256	3,316	$454.00	256	3,448	$463
71	**Arts, Entertainment, and Recreation**	**150**	**2,418**	**$385.00**	**146**	**2,412**	**$382.00**	**146**	**2,412**	**$423**
711	Performing Arts and Spectator Sports	29	252	$891.00	28	250	$806.00	27	245	$1,166
712	Museums, Historic Sites, Zoos, and Parks	11	135	$427.00	10	139	$434.00	10	150	$417
713	Gambling, Recreation, Amusement Industries	111	2,031	$320.00	108	2,023	$326.00	109	2,017	$333
72	**Accommodation and Food Services**	**810**	**13,998**	**$324.00**	**828**	**14,318**	**$331.00**	**851**	**14,730**	**$338**
721	Accommodation	51	1,246	$418.00	51	1,256	$437.00	52	1,307	$478
722	Food Services and Drinking Places	759	12,752	$315.00	778	13,036	$321.00	799	13,423	$325
81	**Other Services Except Public Admin**	**959**	**6,523**	**$599.00**	**990**	**6,793**	**$602.00**	**979**	**6,894**	**$635**
811	Repair and Maintenance	350	1,942	$857.00	351	2,006	$865.00	347	2,032	$866
812	Personal and Laundry Services	290	2,326	$481.00	307	2,430	$489.00	311	2,517	$566
813	Membership Associations and Organizations	178	2,048	$506.00	180	2,140	$502.00	173	2,140	$514
814	Private Households	141	207	$444.00	152	217	$428.00	148	204	$440
99	**Unclassified Establishments**	**n**	**n**	**n**	**6**	**11**	**$694.00**	**12**	**23**	**$480**
999	Unclassified Establishments	n	n	n	6	11	$694.00	12	23	$480
	Total Government	**281**	**21,407**	**$974.00**	**284**	**21,291**	**$982.00**	**281**	**21,185**	**$987**
	Federal Government	74	3,841	$1,544.00	73	3,881	$1,536.00	70	3,822	$1,516
	State Government	91	1,994	$753.00	94	1,950	$751.00	96	2,013	$742
	Local Government	117	15,572	$862.00	117	15,460	$872.00	115	15,350	$887

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for Rockingham County

NAICS Code	Industry	Rockingham County 2011			Rockingham County 2012			Rockingham County 2013		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
ALL	**Total, Private plus Government**	**9,783**	**133,444**	**$881**	**9,828**	**135,396**	**$907.00**	**9,835**	**137,505**	**$919**
	Total Private	9,497	119,079	$884	9,526	121,125	$913.00	9,835	137,505	$919
101	**Goods-Producing Industries**	1,371	18,941	$1,146	1,369	18,942	$1,201.00	1,367	19,558	$2,105
11	**Agriculture/Forestry/Fishing**	**27**	**240**	**$441**	**27**	**241**	**$446.00**	**27**	**243**	**$464**
111	Crop Production	13	161	$360	14	161	$384.00	14	165	$397
112	Animal Production	5	26	$614	4	27	$583.00	4	27	$511
113	Forestry and Logging	3	19	$647	3	13	$739.00	n	n	n
114	Fishing, Hunting, and Trapping	n	n	n	n	n	n	n	n	n
115	Agriculture and Forestry Support Activities	n	n	n	n	n	n	6	37	$634
21	**Mining**	**11**	**113**	**$1,112**	**10**	**102**	**$1,160.00**	**12**	**112**	**$1,007**
211	Oil and Gas Extraction	n	n	n	0	0	$0.00	0	0	$0
212	Mining (except Oil and Gas)	n	n	n	n	n	n	n	n	n
213	Support Activities for Mining	n	n	n	n	n	n	n	n	n
23	**Construction**	**870**	**5,407**	**$1,018**	**867**	**5,353**	**$1,072.00**	**857**	**5,350**	**$1,066**
236	Construction of Buildings	229	891	$976	227	891	$1,116.00	222	956	$1,135
237	Heavy and Civil Engineering Construction	51	809	$1,315	46	970	$1,409.00	46	999	$1,345
238	Specialty Trade Contractors	590	3,708	$964	594	3,493	$967.00	589	3,395	$964
31-33	**Manufacturing**	**464**	**13,181**	**$1,212**	**465**	**13,245**	**$1,267.00**	**472**	**13,852**	**$1,273**
311	Food Manufacturing	30	1,189	$1,196	31	1,220	$1,188.00	28	1,265	$1,283
312	Beverage and Tobacco Product Manufacturing	8	250	$943	10	288	$1,055.00	11	292	$914
313	Textile Mills	n	n	n	n	n	n	n	n	n
314	Textile Product Mills	n	n	n	n	n	n	n	n	n
315	Apparel Manufacturing	n	n	n	n	n	n	n	n	n
316	Leather and Allied Product Manufacturing	n	n	n	n	n	n	n	n	n
321	Wood Product Manufacturing	18	166	$931	17	131	$946.00	17	186	$1,000
322	Paper Manufacturing	8	98	$781	8	101	$809.00	9	102	$815
323	Printing and Related Support Activities	40	392	$791	39	394	$846.00	41	417	$847
324	Petroleum and Coal Products Manufacturing	5	165	$1,249	5	187	$1,277.00	5	186	$1,509
325	Chemical Manufacturing	18	926	$1,415	16	998	$1,492.00	18	1,067	$1,502
326	Plastics and Rubber Products Manufacturing	20	977	$940	21	1,043	$977.00	21	1,082	$998
327	Nonmetallic Mineral Product Manufacturing	19	724	$1,214	21	736	$1,251.00	21	738	$1,241
331	Primary Metal Manufacturing	6	313	$927	5	268	$953.00	5	263	$950
332	Fabricated Metal Product Manufacturing	100	2,162	$1,190	108	2,387	$1,385.00	114	2,599	$1,255
333	Machinery Manufacturing	31	1,605	$1,220	31	1,504	$1,283.00	29	1,526	$1,359
334	Computer and Electronic Product Manufacturing	69	2,422	$1,540	62	2,076	$1,477.00	61	2,091	$1,562
335	Electrical Equipment/Appliances Manufacturing	15	630	$1,179	14	602	$1,210.00	15	663	$1,261
336	Transportation Equipment Manufacturing	9	99	$870	9	118	$856.00	9	143	$831
337	Furniture and Related Product Manufacturing	22	265	$968	21	279	$964.00	24	287	$992
339	Miscellaneous Manufacturing	33	375	$941	32	467	$1,329.00	30	451	$1,298
102	**Service-Providing Industries**	8,108	100,138	$834	8,157	102,183	$860.00	8,167	103,698	$872
22	**Utilities**	**19**	**1,063**	**$2,137**	**20**	**1,054**	**$2,096.00**	**19**	**1,015**	**$2,091**
221	Utilities	19	1,063	$2,137	20	1,054	$2,096.00	19	1,015	$2,091
42	**Wholesale Trade**	**963**	**6,246**	**$1,392**	**927**	**6,400**	**$1,428.00**	**906**	**6,442**	**$1,458**
423	Merchant Wholesalers, Durable Goods	290	2,974	$1,258	287	3,061	$1,291.00	292	3,130	$1,320
424	Merchant Wholesalers, Nondurable Goods	99	1,697	$1,170	100	1,719	$1,202.00	97	1,671	$1,226
425	Electronic Markets and Agents and Brokers	575	1,575	$1,885	541	1,620	$1,929.00	517	1,640	$1,957
44-45	**Retail Trade**	**1,450**	**25,241**	**$484**	**1,477**	**25,600**	**$502.00**	**1,475**	**25,456**	**$503**
441	Motor Vehicle and Parts Dealers	182	2,506	$864	186	2,561	$880.00	199	2,605	$894
442	Furniture and Home Furnishings Stores	73	653	$570	75	624	$586.00	79	627	$622
443	Electronics and Appliance Stores	91	1,042	$822	90	1,015	$895.00	85	1,034	$946
444	Building Material and Garden Supply Stores	131	2,636	$651	135	2,719	$633.00	130	2,738	$625
445	Food and Beverage Stores	136	6,068	$333	133	6,170	$333.00	132	6,085	$341
446	Health and Personal Care Stores	95	1,079	$516	111	1,125	$569.00	114	1,123	$557
447	Gasoline Stations	117	976	$370	119	1,004	$378.00	114	961	$382
448	Clothing and Clothing Accessories Stores	181	1,971	$312	184	2,045	$312.00	185	1,953	$352
451	Sporting Goods, Hobby, Book, and Music Stores	106	1,042	$330	102	999	$325.00	103	1,043	$331
452	General Merchandise Stores	63	4,808	$380	63	4,834	$386.00	67	4,733	$398
453	Miscellaneous Store Retailers	201	1,672	$381	203	1,733	$383.00	192	1,766	$392
454	Nonstore Retailers	76	787	$937	77	772	$1,350.00	78	789	$990
48-49	**Transportation and Warehousing**	**225**	**3,986**	**$744**	**228**	**4,121**	**$750.00**	**230**	**4,150**	**$787**
481	Air Transportation	9	130	$1,079	9	144	$1,142.00	9	149	$1,204
484	Truck Transportation	98	866	$894	101	852	$912.00	101	812	$954
485	Transit and Ground Passenger Transportation	35	1,266	$447	34	1,296	$475.00	35	1,295	$520
486	Pipeline Transportation	n	n	n	n	n	n	n	n	n
487	Scenic and Sightseeing Transportation	n	n	n	n	n	n	n	n	n
488	Support Activities for Transportation	33	306	$1,098	33	326	$1,051.00	38	350	$1,045
491	Postal Service	0	0	$0	0	0	$0.00	0	0	$0
492	Couriers and Messengers	20	473	$902	22	546	$842.00	22	576	$855
493	Warehousing and Storage	16	869	$784	16	876	$793.00	15	892	$834

Source: NH Economic and Labor Market Information Bureau

Comprehensive Economic Development Strategy 2015

Table C-2: Employment and Wages for Rockingham County

NAICS Code	Industry	Rockingham County 2011			Rockingham County 2012			Rockingham County 2013		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
51	**Information**	**123**	**2,445**	**$1,539**	**114**	**3,056**	**$1,586.00**	**106**	**3,004**	**$1,677**
511	Publishing Industries (except Internet)	46	1,014	$1,917	42	1,107	$1,844.00	41	1,184	$1,866
512	Motion Picture and Sound Recording	9	105	$394	11	115	$383.00	12	135	$349
515	Broadcasting (except Internet)	4	57	$1,091	5	66	$1,125.00	5	65	$1,046
517	Telecommunications	21	727	$1,498	20	805	$1,526.00	18	804	$1,595
518	Data Processing and Related Services	24	480	$1,155	19	907	$1,535.00	17	760	$1,787
519	Other Information Services	18	61	$1,165	16	56	$1,170.00	15	56	$1,328
52	**Finance and Insurance**	**421**	**4,997**	**$1,545**	**417**	**4,995**	**$1,588.00**	**437**	**5,538**	**$1,597**
522	Credit Intermediation and Related Activities	151	2,099	$1,290	148	1,896	$1,294.00	159	2,039	$1,256
523	Financial Investment and Related Activities	124	554	$2,590	129	605	$2,691.00	n	n	n
524	Insurance Carriers and Related Activities	139	2,333	$1,528	133	2,479	$1,549.00	141	2,882	$1,583
525	Funds, Trusts, and Other Financial Vehicles	8	11	$961	8	16	$936.00	n	n	n
53	**Real Estate and Rental and Leasing**	**312**	**1,721**	**$983**	**306**	**1,544**	**$951.00**	**311**	**1,615**	**$994**
531	Real Estate	251	1,137	$902	250	1,131	$935.00	256	1,162	$956
532	Rental and Leasing Services	61	583	$1,141	56	413	$993.00	55	453	$1,091
533	Lessors of Nonfinancial Intangible Assets	0	0	$0	0	0	$0.00	0	0	$0
54	**Professional and Technical Services**	**1,130**	**7,129**	**$1,372**	**1,135**	**7,030**	**$1,362.00**	**1,124**	**7,708**	**$1,440**
541	Professional and Technical Services	1,130	7,129	$1,372	1,135	7,030	$1,362.00	1,124	7,708	$1,440
5411	Legal Services	176	806	$1,125	170	787	$1,125.00	160	766	$1,223
5412	Accounting and Bookkeeping Services	133	1,007	$946	130	1,017	$1,023.00	134	1,082	$1,080
5413	Architectural and Engineering Services	186	1,169	$1,780	183	1,252	$1,661.00	182	1,395	$1,581
5414	Specialized Design Services	21	51	$1,132	21	52	$1,140.00	19	47	$1,266
5415	Computer Systems Design and Related Services	242	1,738	$1,375	247	1,574	$1,509.00	250	2,075	$1,712
5416	Management and Technical Consulting Services	212	905	$1,884	226	882	$1,760.00	228	925	$1,745
5417	Scientific Research and Development Services	25	214	$2,440	26	261	$1,709.00	24	275	$1,711
5418	Advertising, PR, and Related Services	51	265	$1,022	47	253	$1,089.00	44	216	$990
5419	Other Professional and Technical Services	85	974	$920	84	953	$904.00	85	927	$945
55	**Management of Companies/Enterprises**	**91**	**1,999**	**$2,592**	**100**	**1,844**	**$3,144.00**	**104**	**1,685**	**$2,844**
551	Management of Companies/Enterprises	91	1,999	$2,592	100	1,844	$3,144.00	104	1,685	$2,844
56	**Administrative and Waste Services**	**694**	**8,374**	**$830**	**718**	**8,445**	**$905.00**	**714**	**8,627**	**$894**
561	Administrative and Support Services	635	7,791	$810	659	7,842	$888.00	654	7,980	$876
5611	Office Administrative Services	109	753	$1,805	120	861	$1,864.00	113	842	$1,806
5612	Facilities Support Services	6	60	$437	8	98	$440.00	9	78	$467
5613	Employment Services	101	3,367	$701	104	3,059	$809.00	107	3,164	$824
5614	Business Support Services	58	976	$908	53	1,124	$915.00	48	967	$885
5615	Travel Arrangement and Reservation Services	41	185	$1,159	43	180	$1,247.00	42	210	$1,315
5616	Investigation and Security Services	27	669	$844	27	691	$904.00	32	784	$842
5617	Services to Buildings and Dwellings	281	1,562	$507	291	1,593	$524.00	292	1,711	$533
5619	Other Support Services	13	219	$515	14	237	$550.00	13	225	$543
562	Waste Management and Remediation Services	59	584	$1,093	60	603	$1,125.00	60	647	$1,120
61	**Educational Services**	**133**	**2,678**	**$690**	**132**	**2,633**	**$723.00**	**130**	**2,630**	**$745**
611	Educational Services	133	2,678	$690	132	2,633	$723.00	130	2,630	$745
62	**Health Care and Social Assistance**	**850**	**14,871**	**$853**	**861**	**15,307**	**$864.00**	**853**	**15,194**	**$879**
621	Ambulatory Health Care Services	581	6,089	$1,126	592	6,172	$1,167.00	588	6,105	$1,189
622	Hospitals	6	3,599	$930	8	3,671	$937.00	8	3,710	$952
623	Nursing and Residential Care Facilities	47	2,519	$574	45	2,520	$575.00	43	2,405	$587
624	Social Assistance	217	2,664	$392	216	2,944	$388.00	213	2,974	$390
71	**Arts, Entertainment, and Recreation**	**156**	**2,928**	**$374**	**162**	**3,032**	**$375.00**	**165**	**2,948**	**$3,887**
711	Performing Arts and Spectator Sports	30	416	$542	32	440	$518.00	33	450	$559
712	Museums, Historic Sites, Zoos, and Parks	13	141	$318	13	146	$333.00	13	141	$331
713	Gambling, Recreation, Amusement Industries	114	2,371	$348	117	2,446	$352.00	118	2,357	$358
72	**Accommodation and Food Services**	**771**	**12,539**	**$340**	**775**	**13,147**	**$344.00**	**798**	**13,639**	**$346**
721	Accommodation	81	1,547	$418	80	1,566	$431.00	81	1,574	$421
722	Food Services and Drinking Places	691	10,992	$329	695	11,580	$332.00	717	12,065	$336
81	**Other Services Except Public Admin**	**766**	**3,915**	**$608**	**778**	**3,967**	**$623.00**	**787**	**4,024**	**$619**
811	Repair and Maintenance	287	1,597	$862	301	1,631	$873.00	308	1,582	$888
812	Personal and Laundry Services	259	1,509	$396	259	1,514	$401.00	265	1,592	$406
813	Membership Associations and Organizations	104	649	$515	101	660	$553.00	100	698	$526
814	Private Households	116	160	$457	117	162	$464.00	115	151	$484
99	**Unclassified Establishments**	**6**	**7**	**$452**	**9**	**11**	**$1,002.00**	**12**	**22**	**$940**
999	Unclassified Establishments	6	7	$452	9	11	$1,002.00	12	22	$940
	Total Government	**304**	**14,366**	**$855**	**302**	**14,272**	**$857.00**	**301**	**14,250**	**$874**
	Federal Government	64	1,122	$1,200	64	986	$1,247.00	62	971	$1,251
	State Government	97	1,285	$663	93	1,246	$641.00	93	1,265	$652
	Local Government	144	11,958	$844	145	12,039	$848.00	146	12,014	$867

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for State of NH

NAICS Code	Industry	State of NH - 2012					State of NH - 2013				
		Units	Average Annual Empl.	Average Weekly Wage	Hills. Co. share of emplymt	Rock. Co. share of emplymt	Units	Average Annual Empl.	Average Weekly Wage	Hills. Co. share of emplymt	Rock. Co. share of emplymt
ALL	**Total, Private plus Government**	44,804	612,432	$928.00	30.8%	22.1%	45,183	618,756	$942	30.8%	22.2%
	Total Private	42,820	527,263	$938.00	31.7%	23.0%	43,187	534,106	$951	31.7%	25.7%
101	**Goods-Producing Industries**	5,908	90,404	$1,152.00	35.0%	21.0%	5,900	90,890	$1,173	34.0%	21.5%
11	**Agriculture/Forestry/Fishing**	248	1,810	$624.00	7.7%	13.3%	256	1,893	$604	7.7%	12.8%
111	Crop Production	63	798	$445.00	9.5%	20.2%	68	800	$461	10.3%	20.6%
112	Animal Production	52	458	$502.00	n/a	5.9%	52	508	$495	n/a	5.3%
113	Forestry and Logging	99	416	$766.00	12.5%	3.1%	98	425	$770	11.8%	n/a
114	Fishing, Hunting, and Trapping	n	n	n	n/a	n/a	n	n	n	n/a	n/a
115	Agriculture and Forestry Support Activities	n	n	n	n/a	n/a	n	n	n	n/a	n/a
21	**Mining**	62	500	$1,102.00	9.0%	20.4%	67	531	$1,030	10.7%	21.1%
211	Oil and Gas Extraction	0	0	$0.00	n/a	n/a	0	0	$0	n/a	n/a
212	Mining (except Oil and Gas)	n	n	n	n/a	n/a	57	433	$1,003	13.2%	n/a
213	Support Activities for Mining	n	n	n	n/a	n/a	10	99	$1,151	0.0%	n/a
23	**Construction**	3,627	22,156	$990.00	27.8%	24.2%	3,624	22,524	$1,020	27.9%	23.8%
236	Construction of Buildings	940	4,851	$1,021.00	27.6%	18.4%	923	4,806	$1,078	27.2%	19.9%
237	Heavy and Civil Engineering Construction	200	2,873	$1,267.00	9.6%	33.8%	195	2,965	$1,266	11.8%	33.7%
238	Specialty Trade Contractors	2,488	14,433	$925.00	31.4%	24.2%	2,507	14,753	$951	31.4%	23.0%
31-33	**Manufacturing**	1,971	65,939	$1,221.00	38.4%	20.1%	1,953	65,942	$1,243	37.0%	21.0%
311	Food Manufacturing	112	2,251	$967.00	18.4%	54.2%	113	2,319	$1,028	17.6%	54.5%
312	Beverage and Tobacco Product Manufacturing	23	697	$1,217.00	48.9%	41.3%	24	714	$1,165	53.9%	40.9%
313	Textile Mills	26	1,617	$1,153.00	36.7%	n/a	26	1,801	$1,147	34.8%	n/a
314	Textile Product Mills	41	212	$597.00	39.2%	n/a	41	211	$613	34.6%	n/a
315	Apparel Manufacturing	16	437	$866.00	n/a	n/a	16	439	$893	n/a	n/a
316	Leather and Allied Product Manufacturing	11	152	$637.00	n/a	n/a	11	142	$689	n/a	n/a
321	Wood Product Manufacturing	100	1,515	$785.00	10.8%	8.6%	98	1,616	$827	8.9%	11.5%
322	Paper Manufacturing	25	1,193	$1,066.00	56.4%	8.5%	26	1,122	$1,099	54.5%	9.1%
323	Printing and Related Support Activities	173	2,384	$867.00	25.8%	16.5%	172	2,355	$859	25.0%	17.7%
324	Petroleum and Coal Products Manufacturing	16	260	$1,252.00	n/a	71.9%	16	265	$1,412	n/a	70.2%
325	Chemical Manufacturing	54	1,837	$1,279.00	21.6%	54.3%	59	1,922	$1,305	20.3%	55.5%
326	Plastics and Rubber Products Manufacturing	98	4,774	$975.00	40.0%	21.8%	96	4,848	$992	39.4%	22.3%
327	Nonmetallic Mineral Product Manufacturing	94	1,867	$1,069.00	21.2%	39.4%	95	1,752	$1,056	21.8%	42.1%
331	Primary Metal Manufacturing	39	2,741	$970.00	42.9%	9.8%	36	2,411	$1,012	46.9%	10.9%
332	Fabricated Metal Product Manufacturing	391	10,955	$1,097.00	28.2%	21.8%	396	11,722	$1,077	26.7%	22.2%
333	Machinery Manufacturing	163	7,593	$1,281.00	16.0%	19.8%	154	7,474	$1,361	15.3%	20.4%
334	Computer and Electronic Product Manufacturing	272	14,840	$1,682.00	70.8%	14.0%	264	14,331	$1,725	69.5%	14.6%
335	Electrical Equipment/Appliances Manufacturing	56	3,724	$1,212.00	42.1%	16.2%	54	3,674	$1,237	39.5%	18.0%
336	Transportation Equipment Manufacturing	39	1,818	$1,257.00	6.5%	6.5%	39	1,899	$1,282	5.2%	7.5%
337	Furniture and Related Product Manufacturing	71	916	$791.00	9.0%	30.5%	73	926	$820	9.6%	31.0%
339	Miscellaneous Manufacturing	154	4,157	$1,031.00	46.2%	11.2%	148	4,000	$1,061	45.9%	11.3%
102	**Service-Providing Industries**	36,913	436,858	$894.00	31.0%	23.4%	37,287	443,216	$905	31.3%	23.4%
22	**Utilities**	103	2,452	$1,818.00	15.3%	43.0%	105	2,479	$1,820	15.7%	40.9%
221	Utilities	103	2,452	$1,818.00	15.3%	43.0%	105	2,479	$1,820	15.7%	40.9%
42	**Wholesale Trade**	4,854	26,642	$1,550.00	27.4%	24.0%	4,856	26,760	$1,581	27.1%	24.1%
423	Merchant Wholesalers, Durable Goods	958	10,682	$1,431.00	40.0%	28.7%	983	10,761	$1,466	39.7%	29.1%
424	Merchant Wholesalers, Nondurable Goods	377	7,193	$1,059.00	17.4%	23.9%	361	7,159	$1,059	19.0%	23.3%
425	Electronic Markets and Agents and Brokers	3,519	8,768	$2,098.00	20.4%	18.5%	3,512	8,839	$2,143	18.4%	18.6%
44-45	**Retail Trade**	5,860	94,360	$537.00	29.0%	27.1%	5,868	94,724	$547	29.6%	26.9%
441	Motor Vehicle and Parts Dealers	756	11,473	$877.00	31.5%	22.3%	781	11,803	$919	31.9%	22.1%
442	Furniture and Home Furnishings Stores	296	2,376	$595.00	34.1%	26.3%	300	2,380	$619	12.1%	26.3%
443	Electronics and Appliance Stores	308	3,491	$1,157.00	48.2%	29.1%	291	3,446	$1,154	47.1%	30.0%
444	Building Material and Garden Supply Stores	520	8,969	$617.00	22.7%	30.3%	511	9,089	$621	23.3%	30.1%
445	Food and Beverage Stores	586	21,914	$352.00	27.6%	28.2%	589	21,861	$360	28.4%	27.8%
446	Health and Personal Care Stores	415	4,328	$625.00	31.0%	26.0%	430	4,377	$625	32.3%	25.7%
447	Gasoline Stations	591	4,527	$371.00	19.0%	22.2%	580	4,497	$373	19.2%	21.4%
448	Clothing and Clothing Accessories Stores	651	7,088	$339.00	37.5%	28.9%	677	7,237	$348	40.7%	27.0%
451	Sporting Goods, Hobby, Book, and Music Stores	409	4,183	$369.00	34.1%	23.9%	411	4,327	$370	34.9%	24.1%
452	General Merchandise Stores	254	15,825	$394.00	25.3%	30.5%	262	15,428	$404	25.1%	30.7%
453	Miscellaneous Store Retailers	713	5,228	$394.00	31.9%	33.1%	676	5,373	$401	33.3%	32.9%
454	Nonstore Retailers	363	4,957	$1,058.00	23.9%	15.6%	361	4,905	$1,039	22.4%	16.1%
48-49	**Transportation and Warehousing**	873	12,230	$741.00	30.7%	33.7%	864	12,285	$755	29.6%	33.8%
481	Air Transportation	40	458	$1,159.00	61.4%	31.4%	39	433	$1,217	58.4%	34.4%
484	Truck Transportation	388	2,820	$873.00	26.6%	30.2%	0	0	$0	n/a	n/a
485	Transit and Ground Passenger Transportation	139	3,170	$435.00	22.2%	40.9%	0	0	$0	n/a	n/a
486	Pipeline Transportation	n	n	n	n/a	n/a	382	2,789	$892	0.0%	n/a
487	Scenic and Sightseeing Transportation	24	316	$460.00	n/a	n/a	135	2,301	$452	0.0%	n/a
488	Support Activities for Transportation	117	945	$885.00	n/a	34.5%	n	n	n	n/a	n/a
491	Postal Service	n	n	n	n/a	n/a	22	316	$485	0.0%	0.0%
492	Couriers and Messengers	90	2,262	$818.00	n/a	24.1%	92	2,346	$842	n/a	24.6%
493	Warehousing and Storage	67	2,235	$821.00	35.9%	39.2%	67	2,270	$831	34.0%	39.3%

Source: NH Economic and Labor Market Information Bureau

Comprehensive Economic Development Strategy 2015

Table C-2: Employment and Wages for State of NH

NAICS Code	Industry	State of NH - 2012					State of NH - 2013				
		Units	Average Annual Empl.	Average Weekly Wage	Hills. Co. share of emplymt	Rock. Co. share of emplymt	Units	Average Annual Empl.	Average Weekly Wage	Hills. Co. share of emplymt	Rock. Co. share of emplymt
51	**Information**	**672**	**12,046**	**$1,453.00**	**43.7%**	**25.4%**	**681**	**11,890**	**$1,519**	**43.1%**	**25.3%**
511	Publishing Industries (except Internet)	227	4,910	$1,707.00	51.6%	22.5%	236	4,902	$1,751	49.6%	24.2%
512	Motion Picture and Sound Recording	57	714	$552.00	44.7%	16.1%	61	753	$573	43.6%	17.9%
515	Broadcasting (except Internet)	47	656	$905.00	32.8%	10.1%	47	673	$934	33.9%	9.7%
517	Telecommunications	143	3,737	$1,433.00	49.6%	21.5%	132	3,717	$1,489	49.2%	21.6%
518	Data Processing and Related Services	70	1,579	$1,403.00	14.4%	57.4%	72	1,378	$1,578	14.6%	55.2%
519	Other Information Services	128	451	$1,244.00	24.8%	12.4%	133	467	$1,527	21.6%	12.0%
52	**Finance and Insurance**	**1,976**	**27,435**	**$1,628.00**	**35.8%**	**18.2%**	**2,003**	**27,817**	**$1,657**	**36.2%**	**19.9%**
522	Credit Intermediation and Related Activities	709	7,885	$1,155.00	27.7%	24.0%	737	7,959	$1,165	26.8%	n/a
523	Financial Investment and Related Activities	461	6,132	$2,543.00	80.3%	9.9%	477	6,275	$2,553	80.5%	n/a
524	Insurance Carriers and Related Activities	768	13,082	$1,493.00	19.7%	18.9%	775	13,571	$1,531	n/a	21.2%
525	Funds, Trusts, and Other Financial Vehicles	38	335	$1,297.00	39.1%	4.8%	14	12	$1,824	n/a	n/a
53	**Real Estate and Rental and Leasing**	**1,325**	**6,552**	**$863.00**	**34.8%**	**23.6%**	**1,309**	**6,767**	**$886**	**35.0%**	**23.9%**
531	Real Estate	1,058	4,725	$847.00	36.8%	23.9%	1,061	4,822	$875	36.8%	24.1%
532	Rental and Leasing Services	258	1,768	$894.00	30.1%	23.4%	242	1,897	$902	n/a	23.9%
533	Lessors of Nonfinancial Intangible Assets	9	59	$1,226.00	15.3%	0.0%	6	47	$1,400	n/a	0.0%
54	**Professional and Technical Services**	**5,460**	**30,372**	**$1,533.00**	**38.6%**	**23.1%**	**5,553**	**31,751**	**$1,543**	**38.8%**	**24.3%**
541	Professional and Technical Services	5,460	30,372	$1,533.00	38.6%	23.1%	5,553	31,751	$1,543	38.8%	24.3%
5411	Legal Services	760	4,064	$1,420.00	40.2%	19.4%	753	4,080	$1,431	41.9%	18.8%
5412	Accounting and Bookkeeping Services	569	4,096	$1,329.00	47.3%	24.8%	574	4,045	$1,302	46.4%	26.7%
5413	Architectural and Engineering Services	731	5,060	$1,522.00	35.6%	24.7%	721	5,176	$1,549	36.6%	27.0%
5414	Specialized Design Services	96	393	$1,252.00	64.1%	13.2%	94	404	$1,285	67.8%	11.6%
5415	Computer Systems Design and Related Services	1,580	7,441	$1,909.00	46.6%	21.2%	1,651	8,246	$1,964	45.0%	25.2%
5416	Management and Technical Consulting Services	967	3,403	$1,820.00	27.7%	25.9%	1,021	3,589	$1,718	28.3%	25.8%
5417	Scientific Research and Development Services	150	1,587	$1,960.00	39.9%	16.4%	149	1,741	$1,950	42.7%	15.8%
5418	Advertising, PR, and Related Services	221	1,439	$857.00	22.2%	17.6%	213	1,556	$738	23.9%	13.9%
5419	Other Professional and Technical Services	385	2,890	$836.00	25.1%	33.0%	378	2,915	$844	25.1%	31.8%
55	**Management of Companies/Enterprises**	**480**	**8,149**	**$1,881.00**	**38.9%**	**22.6%**	**496**	**8,172**	**$1,727**	**38.5%**	**20.6%**
551	Management of Companies/Enterprises	480	8,149	$1,881.00	38.9%	22.6%	496	8,172	$1,727	38.5%	20.6%
56	**Administrative and Waste Services**	**3,327**	**29,663**	**$821.00**	**33.2%**	**28.5%**	**3,413**	**30,480**	**$814**	**33.1%**	**28.3%**
561	Administrative and Support Services	3,141	28,030	$811.00	34.6%	28.0%	3,224	28,825	$804	34.4%	27.7%
5611	Office Administrative Services	666	3,504	$1,848.00	29.4%	24.6%	700	3,434	$1,744	29.6%	24.5%
5612	Facilities Support Services	32	345	$428.00	47.5%	28.4%	35	333	$494	47.1%	23.4%
5613	Employment Services	594	10,377	$686.00	34.3%	29.5%	618	10,421	$717	34.1%	30.4%
5614	Business Support Services	269	2,829	$799.00	30.5%	39.7%	265	2,956	$796	31.1%	32.7%
5615	Travel Arrangement and Reservation Services	146	655	$1,099.00	29.9%	27.5%	149	686	$1,149	24.8%	30.6%
5616	Investigation and Security Services	146	2,014	$807.00	39.5%	34.3%	145	2,083	$793	39.9%	37.6%
5617	Services to Buildings and Dwellings	1,216	7,450	$514.00	39.3%	21.4%	1,236	7,981	$518	39.0%	21.4%
5619	Other Support Services	74	856	$651.00	18.6%	27.7%	77	931	$656	17.4%	24.2%
562	Waste Management and Remediation Services	187	1,633	$991.00	10.4%	36.9%	189	1,655	$1,002	10.8%	39.1%
61	**Educational Services**	**649**	**17,783**	**$945.00**	**25.5%**	**14.8%**	**659**	**18,295**	**$970**	**26.7%**	**14.4%**
611	Educational Services	649	17,783	$945.00	25.5%	14.8%	659	18,295	$970	26.7%	14.4%
62	**Health Care and Social Assistance**	**3,636**	**84,779**	**$937.00**	**31.3%**	**18.1%**	**3,665**	**85,593**	**$948**	**31.7%**	**17.8%**
621	Ambulatory Health Care Services	2254	29,063	$1,307.00	32.7%	21.2%	2290	29,500	$1,315	33.0%	20.7%
622	Hospitals	38	27,276	$1,004.00	30.9%	13.5%	38	27,619	$1,016	31.0%	13.4%
623	Nursing and Residential Care Facilities	327	15,209	$572.00	34.8%	16.6%	331	15,203	$584	35.3%	15.8%
624	Social Assistance	1,018	13,231	$407.00	25.1%	22.3%	1,006	13,271	$408	26.0%	22.4%
71	**Arts, Entertainment, and Recreation**	**688**	**11,185**	**$376.00**	**21.6%**	**27.1%**	**691**	**11,204**	**$395**	**21.5%**	**26.3%**
711	Performing Arts and Spectator Sports	147	1,465	$601.00	17.1%	30.0%	147	1,500	$689	16.3%	30.0%
712	Museums, Historic Sites, Zoos, and Parks	61	580	$375.00	24.0%	25.2%	63	618	$379	24.3%	22.8%
713	Gambling, Recreation, Amusement Industries	480	9,140	$340.00	22.1%	26.8%	482	9,086	$348	22.2%	25.9%
72	**Accommodation and Food Services**	**3,299**	**53,293**	**$339.00**	**26.9%**	**24.7%**	**3,366**	**54,923**	**$344**	**26.8%**	**24.8%**
721	Accommodation	499	8,741	$418.00	14.4%	17.9%	506	9,002	$427	14.5%	17.5%
722	Food Services and Drinking Places	2,800	44,552	$323.00	29.3%	26.0%	2,861	45,920	$328	29.2%	26.3%
81	**Other Services Except Public Admin**	**3,591**	**19,729**	**$616.00**	**34.4%**	**20.1%**	**3,588**	**19,824**	**$635**	**34.8%**	**20.3%**
811	Repair and Maintenance	1,325	6,465	$878.00	31.0%	25.2%	1,325	6,492	$898	31.3%	24.4%
812	Personal and Laundry Services	965	6,330	$451.00	38.4%	23.9%	976	6,511	$484	38.7%	24.5%
813	Membership Associations and Organizations	723	6,019	$531.00	35.6%	11.0%	720	5,959	$540	35.9%	11.7%
814	Private Households	579	916	$443.00	23.7%	17.7%	567	862	$460	23.7%	17.5%
99	**Unclassified Establishments**	**121**	**187**	**$1,330.00**	**5.9%**	**5.9%**	**172**	**254**	**$1,542**	**9.1%**	**8.7%**
999	Unclassified Establishments	121	187	$1,330.00	5.9%	5.9%	172	254	$1,542	9.1%	8.7%
	Total Government	**1,984**	**85,169**	**$868.00**	**25.0%**	**16.8%**	**1,997**	**84,650**	**$885**	**25.0%**	**16.8%**
	Federal Government	373	7,365	$1,398.00	52.7%	13.4%	366	7,368	$1,387	51.9%	13.2%
	State Government	822	20,274	$907.00	9.6%	6.1%	828	20,044	$928	10.0%	6.3%
	Local Government	789	57,530	$787.00	26.9%	20.9%	803	57,238	$805	26.8%	21.0%

Source: NH Economic and Labor Market Information Bureau

Table C-3: Employers, Employment, and Wages by Town

Town/Area	2012			2013			Jobs Per Capita in 2013	# Change: 2012-2013			% Change: 2012-2013		
	Estab-lishments	Avg. Annl. Employ-ment	Average Weekly Wage	Estab-lishments	Avg. Annl. Employ-ment	Average Weekly Wage		Estab-lishments	Avg. Annl. Employ-ment	Average Weekly Wage	Estab-lishments	Avg. Annl. Employ-ment	Average Weekly Wage
East Kingston	42	223	$750	43	238	$747	0.10	1	15	-$3	2.4%	6.7%	-0.4%
Exeter	554	9,832	$1,030	552	9,950	$1,040	0.69	-2	118	$10	-0.4%	1.2%	1.0%
Greenland	172	1,838	$844	175	1,847	$911	0.50	3	9	$67	1.7%	0.5%	7.9%
Hampton	518	5,437	$949	528	5,606	$931	0.37	10	169	-$18	1.9%	3.1%	-1.9%
Hampton Falls	80	496	$638	81	491	$659	0.22	1	-5	$21	1.3%	-1.0%	3.3%
Kensington	45	297	$792	48	311	$763	0.15	3	14	-$29	6.7%	4.7%	-3.7%
New Castle	35	317	$646	35	329	$616	0.34	0	12	-$30	0.0%	3.8%	-4.6%
Newfields	62	542	$844	59	607	$843	0.36	-3	65	-$1	-4.8%	12.0%	-0.1%
Newington	200	4,445	$704	202	4,628	$739	6.19	2	183	$35	1.0%	4.1%	5.0%
Newmarket	149	1,240	$747	154	1,246	$754	0.14	5	6	$7	3.4%	0.5%	0.9%
North Hampton	281	2,351	$1,568	265	2,266	$1,340	0.51	-16	-85	-$228	-5.7%	-3.6%	-14.5%
Portsmouth	1,763	29,274	$1,067	1,798	29,885	$1,109	1.40	35	611	$42	2.0%	2.1%	3.9%
Rye	164	1,256	$725	154	1,250	$745	0.23	-10	-6	$20	-6.1%	-0.5%	2.8%
Seabrook	307	6,091	$962	298	5,917	$937	0.67	-9	-174	-$25	-2.9%	-2.9%	-2.6%
South Hampton	30	116	$735	28	127	$635	0.16	-2	11	-$100	-6.7%	9.5%	-13.6%
Stratham	257	3,700	$1,079	257	3,707	$1,047	0.51	0	7	-$32	0.0%	0.2%	-3.0%
CEDS Eastern Communities	*4,659*	*67,455*	*$880*	*4,677*	*68,405*	*$864*	*0.68*	*18*	*950*	*-$17*	*0.4%*	*1.4%*	*-1.9%*
Atkinson	122	1,112	$858	121	1,164	$861	0.17	-1	52	$3	-0.8%	4.7%	0.3%
Auburn	145	1,620	$848	143	1,689	$877	0.31	-2	69	$29	-1.4%	4.3%	3.4%
Brentwood	145	2,059	$848	145	2,033	$852	0.44	0	-26	$4	0.0%	-1.3%	0.5%
Candia	98	712	$768	98	755	$752	0.19	0	43	-$16	0.0%	6.0%	-2.1%
Chester	76	456	$717	73	396	$713	0.08	-3	-60	-$4	-3.9%	-13.2%	-0.6%
Danville	44	166	$679	39	176	$603	0.04	-5	10	-$76	-11.4%	6.0%	-11.2%
Deerfield	70	385	$605	70	402	$566	0.09	0	17	-$39	0.0%	4.4%	-6.4%
Epping	173	2,583	$606	180	2,786	$601	0.42	7	203	-$5	4.0%	7.9%	-0.8%
Fremont	66	522	$619	70	493	$655	0.11	4	-29	$36	6.1%	-5.6%	5.8%
Hampstead	261	2,202	$693	257	2,210	$702	0.26	-4	8	$9	-1.5%	0.4%	1.3%
Kingston	157	1,430	$676	161	1,493	$710	0.25	4	63	$34	2.5%	4.4%	5.0%
Newton	57	485	$719	55	489	$728	0.10	-2	4	$9	-3.5%	0.8%	1.3%
Northwood	96	983	$689	89	983	$687	0.23	-7	0	-$2	-7.3%	0.0%	-0.3%
Nottingham	49	294	$768	41	275	$804	0.06	-8	-19	$36	-16.3%	-6.5%	4.7%
Plaistow	347	4,667	$674	342	4,650	$671	0.61	-5	-17	-$3	-1.4%	-0.4%	-0.4%
Raymond	178	2,741	$798	177	2,772	$817	0.27	-1	31	$19	-0.6%	1.1%	2.4%
Sandown	52	266	$593	57	284	$580	0.05	5	18	-$13	9.6%	6.8%	-2.2%
CEDS Central Communities	*2,136*	*22,683*	*$715*	*2,118*	*23,050*	*$716*	*0.24*	*-18*	*367*	*$1*	*-0.8%*	*1.6%*	*0.2%*
Derry	614	7,733	$780	629	7,856	$789	0.24	15	123	$9	2.4%	1.6%	1.2%
Hudson	614	9,737	$978	605	9,413	$1,019	0.38	-9	-324	$41	-1.5%	-3.3%	4.2%
Litchfield	94	887	$833	93	903	$835	0.11	-1	16	$2	-1.1%	1.8%	0.2%
Londonderry	796	13,382	$916	784	13,221	$909	0.55	-12	-161	-$7	-1.5%	-1.2%	-0.8%
Merrimack	738	16,277	$1,643	769	16,920	$1,577	0.66	31	643	-$66	4.2%	4.0%	-4.0%
Nashua	2,703	49,873	$1,055	2,708	50,278	$1,055	0.58	5	405	$0	0.2%	0.8%	0.0%
Pelham	262	2,300	$806	269	2,329	$803	0.18	7	29	-$3	2.7%	1.3%	-0.4%
Salem	1,253	21,148	$835	1,250	21,741	$874	0.76	-3	593	$39	-0.2%	2.8%	4.7%
Windham	376	2,995	$808	382	3,234	$836	0.23	6	239	$28	1.6%	8.0%	3.5%
CEDS Western Communities	*7,450*	*124,332*	*$962*	*7,489*	*125,895*	*$966*	*0.49*	*39*	*1,563*	*$5*	*0.5%*	*1.3%*	*0.5%*
REDC CEDS Region	*14,245*	*214,470*	*$831*	*14,284*	*217,350*	*$826*	*0.48*	*39*	*2,880*	*-$5*	*0.3%*	*1.3%*	*-0.6%*
Hillsborough County	*11,245*	*188,425*	*$1,030*	*11,257*	*190,568*	*$1,039*	*0.47*	*12*	*2,143*	*$9*	*0.1%*	*1.1%*	*0.9%*
Rockingham County	*9,828*	*135,396*	*$907*	*9,835*	*137,505*	*$919*	*0.46*	*7*	*2,109*	*$12*	*0.1%*	*1.6%*	*1.3%*
New Hampshire	*44,804*	*612,432*	*$928*	*45,183*	*618,756*	*$942*	*0.47*	*379*	*6,324*	*$14*	*0.8%*	*1.0%*	*1.5%*

Source: NH Dept. of Employment Security, Labor Market Information Bureau

Table C-4: Current and Historic Unemployment Data

Town/Area	Unemployment Rate *Not Seasonally Adjusted											10-yr change from 2004 to 2014	5-yr change from 2009 to 2014	1-yr change from 2013 to 2014
	Annual 2004*	Annual 2005*	Annual 2006*	Annual 2007*	Annual 2008*	Annual 2009*	Annual 2010*	Annual 2011*	Annual 2012*	Annual 2013*	Annual 2014*			
East Kingston	5.0%	4.0%	3.9%	4.0%	4.3%	6.0%	5.2%	4.8%	5.0%	5.6%	4.4%	-0.6%	-1.6%	-1.2%
Exeter	4.4%	3.8%	3.5%	3.5%	4.1%	6.3%	6.1%	5.7%	5.7%	5.1%	4.1%	-0.3%	-2.2%	-1.0%
Greenland	3.3%	3.1%	2.8%	3.0%	3.2%	5.0%	5.1%	5.0%	4.6%	4.3%	3.9%	0.6%	-1.1%	-0.4%
Hampton	4.6%	4.2%	3.8%	3.6%	4.2%	6.3%	6.0%	5.3%	5.8%	5.9%	5.3%	0.7%	-1.0%	-0.6%
Hampton Falls	4.6%	3.7%	4.2%	3.5%	4.2%	5.8%	5.1%	5.2%	5.4%	6.1%	4.2%	-0.4%	-1.6%	-1.9%
Kensington	4.4%	4.0%	4.0%	3.7%	4.6%	6.4%	5.8%	5.3%	5.3%	5.3%	3.9%	-0.5%	-2.5%	-1.4%
New Castle	3.1%	3.1%	2.9%	3.2%	2.9%	4.2%	4.2%	3.4%	4.0%	4.3%	3.2%	0.1%	-1.0%	-1.1%
Newfields	2.8%	2.5%	3.0%	2.7%	3.3%	5.8%	6.0%	5.0%	5.1%	5.0%	3.4%	0.6%	-2.4%	-1.6%
Newington	3.0%	2.6%	2.6%	2.5%	2.7%	4.8%	5.4%	3.4%	5.2%	4.8%	3.8%	0.8%	-1.0%	-1.0%
Newmarket	3.1%	3.1%	2.9%	2.8%	3.2%	5.1%	5.2%	4.5%	4.5%	4.1%	3.5%	0.4%	-1.6%	-0.6%
North Hampton	3.1%	3.3%	3.2%	2.7%	3.0%	4.7%	4.9%	4.2%	5.1%	5.0%	4.1%	1.0%	-0.6%	-0.9%
Portsmouth	3.5%	3.2%	2.9%	2.9%	3.4%	5.2%	4.8%	4.3%	4.3%	4.1%	3.5%	0.0%	-1.7%	-0.6%
Rye	3.5%	3.5%	3.3%	3.1%	3.6%	5.4%	5.2%	4.9%	4.8%	5.0%	3.6%	0.1%	-1.8%	-1.4%
Seabrook	4.2%	6.2%	6.2%	5.6%	6.8%	9.3%	8.0%	7.3%	8.1%	7.9%	7.1%	2.9%	-2.2%	-0.8%
South Hampton	4.7%	4.4%	3.5%	3.9%	4.2%	7.7%	4.9%	4.4%	6.5%	6.0%	4.4%	-0.3%	-3.3%	-1.6%
Stratham	3.4%	3.1%	3.2%	3.2%	3.3%	5.0%	4.5%	4.6%	4.5%	4.5%	3.4%	0.0%	-1.6%	-1.1%
CEDS Eastern Communities	*3.8%*	*3.6%*	*3.5%*	*3.4%*	*3.8%*	*5.8%*	*5.4%*	*4.8%*	*5.2%*	*5.2%*	*4.1%*	*0.3%*	*-1.7%*	*-1.1%*
Atkinson	3.9%	3.6%	3.5%	3.6%	5.2%	7.3%	6.6%	6.2%	5.8%	5.9%	5.4%	1.5%	-1.9%	-0.5%
Auburn	3.4%	3.3%	3.1%	2.8%	3.1%	5.4%	5.0%	4.6%	4.3%	4.0%	3.7%	0.3%	-1.7%	-0.3%
Brentwood	5.0%	4.4%	4.5%	4.4%	4.5%	6.8%	6.6%	6.1%	6.2%	5.4%	3.4%	-1.6%	-3.4%	-2.0%
Candia	3.0%	3.0%	3.2%	3.1%	3.1%	4.9%	5.3%	4.3%	4.7%	4.5%	3.6%	0.6%	-1.3%	-0.9%
Chester	4.0%	3.6%	3.3%	3.4%	3.3%	5.3%	5.7%	5.2%	5.1%	5.0%	4.3%	0.3%	-1.0%	-0.7%
Danville	5.4%	4.9%	4.4%	4.7%	5.4%	8.1%	7.5%	7.2%	7.8%	6.7%	5.4%	0.0%	-2.7%	-1.3%
Deerfield	3.5%	3.7%	3.3%	3.9%	3.5%	6.0%	5.9%	4.5%	5.5%	5.3%	4.0%	0.5%	-2.0%	-1.3%
Epping	4.1%	3.7%	3.8%	3.9%	4.7%	7.4%	7.2%	6.2%	6.9%	5.9%	4.4%	0.3%	-3.0%	-1.5%
Fremont	5.2%	4.3%	3.9%	4.0%	4.5%	7.0%	7.0%	5.8%	6.5%	5.7%	4.8%	-0.4%	-2.2%	-0.9%
Hampstead	5.4%	4.5%	4.4%	4.1%	5.0%	7.4%	7.0%	6.1%	6.7%	6.3%	5.1%	-0.3%	-2.3%	-1.2%
Kingston	5.5%	5.1%	4.4%	4.8%	5.4%	7.6%	7.5%	7.0%	7.6%	7.3%	5.9%	0.4%	-1.7%	-1.4%
Newton	5.5%	5.0%	4.5%	4.1%	5.4%	7.5%	7.0%	6.8%	7.2%	6.0%	4.8%	-0.7%	-2.7%	-1.2%
Northwood	3.9%	3.3%	3.5%	3.6%	4.0%	6.8%	6.1%	6.0%	7.5%	5.0%	4.2%	0.3%	-2.6%	-0.8%
Nottingham	3.7%	3.6%	3.2%	3.0%	3.4%	5.6%	5.0%	4.3%	4.6%	4.5%	3.5%	-0.2%	-2.1%	-1.0%
Plaistow	6.2%	5.2%	4.9%	5.2%	5.8%	8.0%	7.4%	6.4%	7.5%	7.5%	6.5%	0.3%	-1.5%	-1.0%
Raymond	4.8%	4.3%	4.0%	4.1%	4.6%	7.5%	7.0%	5.9%	5.9%	5.7%	4.8%	0.0%	-2.7%	-0.9%
Sandown	5.7%	4.5%	4.2%	4.0%	5.5%	7.8%	7.2%	6.8%	6.9%	6.5%	5.2%	-0.5%	-2.6%	-1.3%
CEDS Central Communities	*4.6%*	*4.2%*	*3.9%*	*3.9%*	*4.5%*	*6.8%*	*6.5%*	*5.8%*	*6.3%*	*5.7%*	*4.6%*	*0.0%*	*-2.2%*	*-1.1%*
Derry	5.1%	4.7%	4.2%	4.0%	4.5%	6.9%	7.0%	6.1%	6.5%	6.1%	5.1%	0.0%	-1.8%	-1.0%
Hudson	4.6%	4.2%	3.8%	3.8%	4.2%	6.7%	6.6%	5.8%	6.1%	5.8%	5.2%	0.6%	-1.5%	-0.6%
Litchfield	3.8%	3.3%	3.2%	3.2%	3.6%	5.7%	6.1%	5.4%	5.3%	5.1%	4.9%	1.1%	-0.8%	-0.2%
Londonderry	4.2%	3.7%	3.5%	3.5%	3.8%	5.9%	5.9%	5.2%	5.6%	5.3%	4.5%	0.3%	-1.4%	-0.8%
Merrimack	3.4%	3.1%	3.0%	3.0%	3.3%	5.8%	5.7%	4.9%	5.0%	4.9%	4.0%	0.6%	-1.8%	-0.9%
Nashua	4.5%	4.1%	4.0%	3.7%	4.1%	6.9%	6.7%	6.0%	6.2%	5.9%	5.1%	0.6%	-1.8%	-0.8%
Pelham	5.8%	5.3%	4.9%	5.0%	5.2%	8.2%	7.8%	7.1%	7.3%	7.2%	6.0%	0.2%	-2.2%	-1.2%
Salem	6.5%	5.6%	4.9%	5.0%	5.4%	8.0%	8.2%	7.3%	8.1%	7.6%	5.5%	-1.0%	-2.5%	-2.1%
Windham	4.8%	4.0%	3.9%	3.7%	3.6%	6.1%	5.5%	5.1%	5.1%	5.2%	4.7%	-0.1%	-1.4%	-0.5%
CEDS Western Communities	*4.7%*	*4.2%*	*3.9%*	*3.9%*	*4.2%*	*6.7%*	*6.6%*	*5.9%*	*6.1%*	*5.9%*	*5.0%*	*0.3%*	*-1.7%*	*-0.9%*
REDC CEDS Region	*4.3%*	*3.9%*	*3.7%*	*3.7%*	*4.2%*	*6.4%*	*6.1%*	*5.5%*	*5.9%*	*5.6%*	*4.5%*	*0.2%*	*-1.9%*	*-1.0%*
Hillsborough County	*4.0%*	*3.7%*	*3.7%*	*3.6%*	*3.9%*	*5.6%*	*6.3%*	*5.5%*	*5.7%*	*5.4%*	*4.5%*	*0.5%*	*-1.1%*	*-0.9%*
Rockingham County	*4.7%*	*4.2%*	*3.9%*	*3.9%*	*4.3%*	*6.6%*	*6.3%*	*5.7%*	*6.0%*	*5.7%*	*4.7%*	*0.0%*	*-1.9%*	*-1.0%*
New Hampshire	*3.9%*	*3.6%*	*3.5%*	*3.5%*	*3.9%*	*6.2%*	*6.1%*	*5.4%*	*5.5%*	*5.3%*	*4.3%*	*0.4%*	*-1.9%*	*-1.0%*

Source: NH Dept. Employ. Security - Economic & Labor Market Information Bureau: Local Area Unemployment Statictics (LAUS) http://nhetwork.nhes.state.nh.us/nhetwork

Table C-5: Employment and Weekly Wages

Town/Area	Private Employers, 2012			Total Number of Employees, 2012				Private Employers, 2013			Total Number of Employees, 2013				Avg. Weekly Wage Total Private + Gov't	
	Private Goods-Producting	Private Service-Providing	Total	Private Goods-Producting	Private Service-Providing	Gov't	Total Private + Gov't	Private Goods-Producting	Private Service-Providing	Total	Private Goods-Producting	Private Service-Providing	Gov't	Total Private + Gov't	2012	2013
East Kingston	12	28	39	32	94	97	223	12	28	40	35	100	103	238	$750	$745
Exeter	52	484	536	1,466	7,417	949	9,832	56	480	535	1,774	7,218	959	9,950	$1,030	$1,040
Greenland	36	130	166	349	1,357	132	1,838	37	132	169	342	1,364	141	1,847	$844	$911
Hampton	53	447	501	740	3,664	1,033	5,437	50	460	510	794	3,789	1,024	5,606	$949	$931
Hampton Falls	9	69	77	62	341	93	496	8	70	78	61	337	93	491	$638	$659
Kensington	11	31	43	41	190	66	297	10	36	46	35	213	64	311	$832	$763
New Castle	n	31	32	n	n	45	317	0	31	31	0	284	44	329	$646	$616
Newfields	13	42	56	273	203	67	542	13	40	53	325	214	68	607	$844	$843
Newington	16	182	198	943	3,404	98	4,445	16	185	200	1,009	3,526	93	4,628	$704	$739
Newmarket	26	117	143	235	668	337	1,240	24	124	148	227	698	321	1,246	$747	$754
North Hampton	41	223	274	195	2,061	96	2,351	37	221	258	196	1,971	99	2,266	$1,568	$1,340
Portsmouth	114	1,598	1,711	2,300	25,151	1,823	29,274	116	1,630	1,746	2,410	25,628	1,847	29,885	$1,067	$1,109
Rye	n	n	155	n	n	219	1,256	13	132	145	21	1010	219	1250	$725	$745
Seabrook	52	246	298	1,063	4,506	523	6,091	50	239	289	900	4,505	512	5,917	$962	$937
South Hampton	9	19	28	43	40	34	116	9	17	26	47	46	34	127	$735	$635
Stratham	31	220	251	608	2,717	375	3,700	30	220	251	658	2,665	385	3,707	$1,079	$1,047
CEDS Eastern Communities	**475**	**3,836**	**4,508**	**8,350**	**51,813**	**5,987**	**65,636**	**481**	**4,045**	**4,525**	**8,834**	**53,568**	**6,006**	**68,405**	**$883**	**$863**
Atkinson	34	86	119	404	641	66	1,112	32	87	119	416	682	66	1,164	$858	$861
Auburn	41	101	142	504	962	154	1,620	42	98	140	486	1,055	147	1,689	$845	$877
Brentwood	35	95	130	325	941	792	2,059	36	95	131	327	967	740	2,033	$844	$852
Candia	24	69	93	205	386	121	712	25	69	93	217	420	119	755	$768	$752
Chester	20	53	73	74	215	168	456	21	48	70	72	170	154	396	$717	$713
Danville	14	28	42	44	75	47	166	13	25	37	46	83	47	176	$679	$603
Deerfield	19	49	68	107	227	52	385	19	49	68	106	240	56	402	$605	$566
Epping	26	137	164	120	2,105	359	2,583	26	145	171	129	2,297	359	2,786	$606	$601
Fremont	20	44	63	96	295	131	522	22	45	67	96	274	123	493	$619	$655
Hampstead	49	208	257	383	1,717	101	2,202	52	201	253	387	1,722	101	2,210	$693	$702
Kingston	30	118	148	118	991	320	1,430	31	121	152	131	1,047	316	1,178	$650	$687
Newton	12	40	52	101	189	194	485	13	38	50	96	202	191	489	$719	$728
Northwood	31	60	91	158	636	190	983	29	55	84	165	631	187	983	$689	$687
Nottingham	9	35	44	41	96	158	294	9	27	36	38	73	163	275	$768	$804
Plaistow	56	281	337	487	3,115	1,065	4,667	54	278	332	483	3,091	1,079	4,650	$674	$671
Raymond	34	140	173	332	1,986	423	2,741	32	140	172	331	2,014	427	2,772	$798	$817
Sandown	17	32	49	51	148	67	266	19	35	54	53	169	62	284	$634	$580
CEDS Central Communities	**471**	**1,576**	**2,045**	**3,550**	**14,725**	**4,408**	**22,683**	**475**	**1,556**	**2,029**	**3,579**	**15,137**	**4,337**	**22,735**	**$716**	**$715**
Derry	89	515	604	714	5,999	1,020	7,733	98	519	618	787	6,030	1,039	7,856	$780	$789
Hudson	155	448	602	3,845	5,002	889	9,737	155	438	593	3,715	4,784	914	9,413	$978	$1,019
Litchfield	22	66	88	199	354	334	887	23	64	87	198	362	343	903	$833	$835
Londonderry	134	648	782	3,931	8,320	1,132	13,382	129	641	770	3,894	8,215	1,112	13,221	$916	$909
Merrimack	101	620	721	3,018	12,141	1,117	16,277	103	649	752	2,885	12,933	1,102	16,920	$1,643	$1,577
Nashua	268	2,396	2,663	7,820	37,489	4,565	49,873	258	2,411	2,669	7,515	38,159	4,602	50,278	$1,055	$1,055
Pelham	67	187	254	595	1,237	468	2,300	68	193	260	608	1,230	491	2,329	$806	$803
Salem	136	1,089	1,225	2,061	17,887	1,200	21,148	140	1,084	1,223	2,166	18,401	1,174	21,741	$835	$874
Windham	50	317	367	305	2,161	529	2,995	49	325	374	299	2,348	587	3,234	$808	$836
CEDS Western Communities	**1,022**	**6,286**	**7,771**	**22,488**	**90,590**	**11,254**	**124,332**	**1,023**	**6,324**	**10,346**	**22,067**	**92,462**	**11,364**	**125,895**	**$962**	**$966**
REDC Region	*1,968*	*11,698*	*14,324*	*34,388*	*157,128*	*21,649*	*212,651*	*1,979*	*11,925*	*16,900*	*34,480*	*161,167*	*21,707*	*217,035*	*$832*	*$825*
Hillsborough County	*1,557*	*9,404*	*10,961*	*31,642*	*135,492*	*21,291*	*188,425*	*1,553*	*9,423*	*10,976*	*30,861*	*138,522*	*21,185*	*190,568*	*$1,030*	*$1,039*
Rockingham County	*1,369*	*8,157*	*9,526*	*18,942*	*102,183*	*14,272*	*135,396*	*1,367*	*8,167*	*9,534*	*19,558*	*103,698*	*14,250*	*137,505*	*$907*	*$919*
New Hampshire	*5,908*	*36,913*	*42,820*	*90,404*	*436,858*	*85,169*	*612,432*	*5,900*	*37,287*	*43,187*	*90,890*	*443,216*	*84,650*	*618,756*	*$928*	*$942*

Source: NH Employment Secu...

Table C-6: Civilian Labor Force and Employment: Hillsborough and Rockingham Counties, New Hampshire, and New England

C-6 Civilian Labor Force and Employment: Hillsborough and Rockingham Counties, New Hampshire, and New England

2015 CEDS

REGION/STATE (in thousands)	2009				2010				2011			
	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)
Hillsborough County	229.9	215.0	14.9	6.5	229.2	214.7	14.4	6.3	228.4	215.7	12.7	5.5
Rockingham County	174.8	163.2	11.6	6.6	176.0	165.0	11.0	6.3	174.9	165.0	9.9	5.7
New Hampshire	745.0	698.0	47.0	6.3	744.0	699.0	45.0	6.1	738.0	698.0	40.0	5.4
Connecticut	1,887.0	1,730.0	157.0	8.3	1,897.0	1,724.0	173.0	9.1	1,902.0	1,749.0	169.0	8.8
Maine	698.0	641.0	57.0	8.2	697.0	642.0	55.0	7.9	704.0	651.0	53.0	7.5
Massachusetts	3,477.0	3,190.0	286.0	8.2	3,494.0	3,197.0	297.0	8.5	3,470.0	3,202.0	254.0	7.4
Rhode Island	566.0	505.0	61.0	10.8	576.0	509.0	67.0	11.6	563.0	500.0	63.0	11.3
Vermont	360.0	335.0	25.0	6.9	361.0	338.0	22.0	6.2	359.0	339.0	20.0	5.6
New England	7,733.0	7,100.0	633.0	8.2	7,770.0	7,109.0	660.0	8.5	7,735.0	7,140.0	599.0	7.7
United States	154,142	139,877	14,265	9.3	153,889	139,064	14,825	9.6	153,617	139,869	13,747	8.9

REGION/STATE (in thousands)	2012				2013				2014			
	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)	Civilian Labor Force	Employed	Unemployed	Unempl. Rate (%)
Hillsborough County	229.5	216.4	13.0	5.7	230.4	217.9	12.5	5.4	228.6	218.3	10.3	4.5
Rockingham County	176.6	166.0	10.6	6.0	178.0	167.8	10.2	5.7	175.7	167.5	8.2	4.7
New Hampshire	742.0	701.0	41.0	5.5	742.1	702.9	39.1	5.3	741.0	709.0	32.0	4.3
Connecticut	1,887.0	1,731.0	156.0	8.3	1,860.0	1,715.0	145.0	7.8	1,885.0	1,760.0	125.0	6.6
Maine	706.0	655.0	52.0	7.3	709.0	662.0	47.0	6.7	669.0	659.0	40.0	5.7
Massachusetts	3,475.0	3,242.0	234.0	6.7	3,484.0	3,238.0	246.0	7.1	3,577.0	3,353.0	205.0	5.8
Rhode Island	560.0	502.0	58.0	10.4	556.0	503.0	53.0	9.5	553.0	511.0	42.0	7.7
Vermont	356.0	339.0	18.0	5.0	351.0	336.0	15.0	4.4	349.0	335.0	14.0	4.1
New England	7,720.0	7,161.0	560.0	7.2	7,702.0	7,157.0	545.0	7.1	7,785.0	7,327.0	458.0	5.9
United States	154,975	142,469	12,506	8.1	155,389	143,929	11,460	7.4	155,992	146,305	9,617	6.2

Source: NH Employment Security, U.S. Bureau of Labor Statistics.

Table D-1: Land Use by Town

Town/Area	Water Area	Land Area	Total Area	% of CEDS Region	Developed Acres	% of CEDS Region	Agriculture Acres	% of CEDS Region	Forested Acres	% of CEDS Region	Undev/Open/Wetlands Acres	% of CEDS Region
East Kingston	64	6,316	6,381	1.2%	1,366	0.8%	620	3.2%	3,288	1.4%	1,043	1.1%
Exeter	242	12,571	12,813	2.3%	3,937	2.2%	335	1.7%	5,821	2.5%	2,478	2.7%
Greenland	1,791	6,733	8,524	1.5%	2,451	1.3%	526	2.7%	2,161	0.9%	1,595	1.7%
Hampton	475	8,598	9,073	1.6%	3,581	2.0%	158	0.8%	1,701	0.7%	3,158	3.4%
Hampton Falls	167	7,911	8,078	1.5%	1,675	0.9%	709	3.6%	2,921	1.3%	2,607	2.8%
Kensington	50	7,620	7,670	1.4%	1,480	0.8%	1,072	5.5%	3,928	1.7%	1,139	1.2%
New Castle	811	537	1,348	0.2%	330	0.2%	0	0.0%	101	0.0%	106	0.1%
Newfields	93	4,554	4,647	0.8%	1,128	0.6%	220	1.1%	2,585	1.1%	621	0.7%
Newington	2,578	5,339	7,917	1.4%	1,850	1.0%	415	2.1%	2,223	1.0%	851	0.9%
Newmarket	1,020	8,059	9,080	1.6%	2,359	1.3%	655	3.4%	3,767	1.6%	1,279	1.4%
North Hampton	56	8,867	8,923	1.6%	2,492	1.4%	234	1.2%	3,010	1.3%	3,132	3.4%
Portsmouth	789	9,975	10,763	1.9%	5,433	3.0%	84	0.4%	1,914	0.8%	2,542	2.7%
Rye	441	7,965	8,406	1.5%	2,429	1.3%	220	1.1%	2,326	1.0%	2,989	3.2%
Seabrook	200	5,961	6,161	1.1%	2,720	1.5%	66	0.3%	958	0.4%	2,218	2.4%
South Hampton	144	5,000	5,145	0.9%	618	0.3%	375	1.9%	2,864	1.2%	1,143	1.2%
Stratham	254	9,648	9,902	1.8%	3,443	1.9%	934	4.8%	2,995	1.3%	2,276	2.4%
CEDS Eastern Communities	*9,173*	*115,655*	*124,828*	*22.6%*	*37,292*	*20.5%*	*6,622*	*34.0%*	*42,563*	*18.3%*	*29,178*	*31.3%*
Atkinson	184	7,075	7,258	1.3%	3,189	1.8%	268	1.4%	3,031	1.3%	586	0.6%
Auburn	2,350	16,087	18,437	3.3%	2,853	1.6%	434	2.2%	11,236	4.8%	1,564	1.7%
Brentwood	182	10,681	10,863	2.0%	2,407	1.3%	822	4.2%	5,432	2.3%	2,020	2.2%
Candia	461	19,096	19,557	3.5%	2,610	1.4%	710	3.6%	14,478	6.2%	1,298	1.4%
Chester	248	16,470	16,718	3.0%	2,117	1.2%	949	4.9%	11,519	4.9%	1,885	2.0%
Danville	332	7,097	7,430	1.3%	1,656	0.9%	81	0.4%	3,979	1.7%	1,381	1.5%
Deerfield	1,168	32,177	33,345	6.0%	2,969	1.6%	1,671	8.6%	25,489	10.9%	2,048	2.2%
Epping	337	16,442	16,779	3.0%	3,148	1.7%	985	5.1%	9,560	4.1%	2,749	2.9%
Fremont	248	10,892	11,139	2.0%	2,178	1.2%	381	2.0%	5,526	2.4%	2,807	3.0%
Hampstead	513	8,501	9,014	1.6%	3,548	2.0%	54	0.3%	3,563	1.5%	1,336	1.4%
Kingston	980	12,471	13,450	2.4%	3,608	2.0%	361	1.9%	5,119	2.2%	3,383	3.6%
Newton	149	6,216	6,365	1.2%	1,971	1.1%	121	0.6%	2,672	1.1%	1,452	1.6%
Northwood	1,424	17,932	19,356	3.5%	2,420	1.3%	704	3.6%	13,103	5.6%	1,705	1.8%
Nottingham	1,159	29,836	30,995	5.6%	3,027	1.7%	498	2.6%	22,484	9.7%	3,826	4.1%
Plaistow	40	6,749	6,790	1.2%	2,986	1.6%	84	0.4%	2,598	1.1%	1,083	1.2%
Raymond	722	18,219	18,941	3.4%	4,393	2.4%	318	1.6%	11,884	5.1%	1,625	1.7%
Sandown	427	8,945	9,372	1.7%	2,706	1.5%	181	0.9%	4,367	1.9%	1,691	1.8%
CEDS Central Communities	*10,922*	*244,887*	*255,809*	*46%*	*47,785*	*26.3%*	*8,623*	*44.3%*	*156,040*	*67.0%*	*32,439*	*34.8%*
Derry	838	22,386	23,224	4.2%	9,073	5.0%	1,113	5.7%	10,251	4.4%	1,949	2.1%
Hudson	395	18,372	18,767	3.4%	13,331	7.3%	187	1.0%	0	0.0%	4,854	5.2%
Litchfield	253	9,507	9,760	1.8%	5,477	3.0%	1,028	5.3%	0	0.0%	3,001	3.2%
Londonderry	318	26,638	26,956	4.9%	11,140	6.1%	989	5.1%	10,703	4.6%	3,807	4.1%
Merrimack	654	20,781	21,435	3.9%	14,530	8.0%	0	0.0%	0	0.0%	6,251	6.7%
Nashua	580	19,729	20,310	3.7%	17,323	9.5%	97	0.5%	0	0.0%	2,309	2.5%
Pelham	383	16,804	17,187	3.1%	10,815	5.9%	317	1.6%	0	0.0%	5,672	6.1%
Salem	808	15,762	16,569	3.0%	8,564	4.7%	275	1.4%	4,779	2.1%	2,144	2.3%
Windham	844	16,928	17,771	3.2%	6,611	3.6%	211	1.1%	8,475	3.6%	1,631	1.7%
CEDS Western Communities	*5,073*	*166,907*	*171,980*	*31%*	*96,864*	*53.2%*	*4,217*	*21.7%*	*34,207*	*14.7%*	*31,618*	*33.9%*
REDC CEDS Region	*25,169*	*527,449*	*552,617*	*100.0%*	*181,941*	*32.9%*	*19,463*	*3.5%*	*232,810*	*42.1%*	*93,235*	*16.9%*
Hillsborough County (CEDS portion only)	*2,266*	*85,193*	*87,459*	*15.8%*	*61,476*	*70.3%*	*1,629*	*1.9%*		*0.0%*	*22,088*	*25.3%*
Rockingham County	*22,903*	*442,256*	*465,158*	*84.2%*	*120,465*	*25.9%*	*17,833*	*3.8%*	*232,810*	*50.0%*	*64,678*	*13.9%*

Source: NH GRANIT, Rockingham Planning Commission, Nashua Regional Planning Commission, So. NH Planning Commission (2012). The photos used for determining land use classification were taken in 2010 and mapped by 2012.

Note: Towns within the Nashua Regional Planning Commission have been classified by parcel. As a result, forested areas are included as part of the primary use of each parcel. Parcels that are completely forested would be classified as vacant.

Table D-2: Land Use Distribution by Town

Town/Area	Total Area	Developed	Agriculture	Forested	Undev / Wetlands	Water
			Acres by Land Use Class			
East Kingston	100.0%	21.4%	9.7%	51.5%	16.3%	1.0%
Exeter	100.0%	30.7%	2.6%	45.4%	19.3%	1.9%
Greenland	100.0%	28.8%	6.2%	25.4%	18.7%	21.0%
Hampton	100.0%	39.5%	1.7%	18.7%	34.8%	5.2%
Hampton Falls	100.0%	20.7%	8.8%	36.2%	32.3%	2.1%
Kensington	100.0%	19.3%	14.0%	51.2%	14.9%	0.7%
New Castle	100.0%	24.5%	0.0%	7.5%	7.9%	60.2%
Newfields	100.0%	24.3%	4.7%	55.6%	13.4%	2.0%
Newington	100.0%	23.4%	5.2%	28.1%	10.8%	32.6%
Newmarket	100.0%	26.0%	7.2%	41.5%	14.1%	11.2%
North Hampton	100.0%	27.9%	2.6%	33.7%	35.1%	0.6%
Portsmouth	100.0%	50.5%	0.8%	17.8%	23.6%	7.3%
Rye	100.0%	28.9%	2.6%	27.7%	35.6%	5.2%
Seabrook	100.0%	44.1%	1.1%	15.5%	36.0%	3.2%
South Hampton	100.0%	12.0%	7.3%	55.7%	22.2%	2.8%
Stratham	100.0%	34.8%	9.4%	30.2%	23.0%	2.6%
CEDS Eastern Communities	*100.0%*	*29.9%*	*5.3%*	*34.1%*	*23.4%*	*7.3%*
Atkinson	100.0%	43.9%	3.7%	41.8%	8.1%	2.5%
Auburn	100.0%	15.5%	2.4%	60.9%	8.5%	12.7%
Brentwood	100.0%	22.2%	7.6%	50.0%	18.6%	1.7%
Candia	100.0%	13.3%	3.6%	74.0%	6.6%	2.4%
Chester	100.0%	12.7%	5.7%	68.9%	11.3%	1.5%
Danville	100.0%	22.3%	1.1%	53.6%	18.6%	4.5%
Deerfield	100.0%	8.9%	5.0%	76.4%	6.1%	3.5%
Epping	100.0%	18.8%	5.9%	57.0%	16.4%	2.0%
Fremont	100.0%	19.5%	3.4%	49.6%	25.2%	2.2%
Hampstead	100.0%	39.4%	0.6%	39.5%	14.8%	5.7%
Kingston	100.0%	26.8%	2.7%	38.1%	25.2%	7.3%
Newton	100.0%	31.0%	1.9%	42.0%	22.8%	2.3%
Northwood	100.0%	12.5%	3.6%	67.7%	8.8%	7.4%
Nottingham	100.0%	9.8%	1.6%	72.5%	12.3%	3.7%
Plaistow	100.0%	44.0%	1.2%	38.3%	15.9%	0.6%
Raymond	100.0%	23.2%	1.7%	62.7%	8.6%	3.8%
Sandown	100.0%	28.9%	1.9%	46.6%	18.0%	4.6%
CEDS Central Communities	*100.0%*	*18.7%*	*3.4%*	*61.0%*	*12.7%*	*4.3%*
Derry	100.0%	39.1%	4.8%	44.1%	8.4%	3.6%
Hudson	100.0%	71.0%	1.0%	0.0%	25.9%	2.1%
Litchfield	100.0%	56.1%	10.5%	0.0%	30.8%	2.6%
Londonderry	100.0%	41.3%	3.7%	39.7%	14.1%	1.2%
Merrimack	100.0%	67.8%	0.0%	0.0%	29.2%	3.1%
Nashua	100.0%	85.3%	0.5%	0.0%	11.4%	2.9%
Pelham	100.0%	62.9%	1.8%	0.0%	33.0%	2.2%
Salem	100.0%	51.7%	1.7%	28.8%	12.9%	4.9%
Windham	100.0%	37.2%	1.2%	47.7%	9.2%	4.7%
CEDS Western Communities	*100.0%*	*56.3%*	*2.5%*	*19.9%*	*18.4%*	*2.9%*
REDC CEDS Region	*100.0%*	*32.9%*	*3.5%*	*42.1%*	*16.9%*	*4.6%*
Hillsborough County (CEDS portion only)	*100.0%*	*70.3%*	*1.9%*	*0.0%*	*25.3%*	*2.6%*
Rockingham County	*100.0%*	*25.9%*	*3.8%*	*50.0%*	*15.3%*	*4.9%*

Source: NH GRANIT, Rockingham Planning Commission, Nashua Regional Planning Commission, So. NH Planning Commission (2012). The photos used for determining land use classification were taken in 2010 and mapped by 2012.

Note: Towns within the Nashua Regional Planning Commission have been classified by parcel. As a result, forested areas are included as part of the primary use of each parcel. Parcels that are completely forested would be classified as vacant.

Table E-1: Property Valuation and Taxes

| Town/Area | Total Population 2013 | Property Valuation and Taxes (excluding State School Tax portion) | | | |
		2013 Total Equalized Valuation	2013 Valuation per Capita	Full Value Tax Rate	State Rank (1=lowest)
East Kingston	2,372	$ 278,782,837	$ 117,531	$ 26.37	169
Exeter	14,454	$ 1,747,957,486	$ 120,932	$ 23.88	130
Greenland	3,699	$ 687,741,493	$ 185,926	$ 14.67	33
Hampton	14,979	$ 2,863,962,884	$ 191,199	$ 17.50	50
Hampton Falls	2,241	$ 421,291,053	$ 187,992	$ 19.80	66
Kensington	2,113	$ 301,336,758	$ 142,611	$ 24.14	138
New Castle	971	$ 647,672,238	$ 667,016	$ 6.30	6
Newfields	1,683	$ 234,593,238	$ 139,390	$ 24.81	150
Newington	748	$ 1,026,512,414	$ 1,372,343	$ 7.22	7
Newmarket	9,173	$ 732,953,940	$ 79,903	$ 24.83	151
North Hampton	4,421	$ 1,038,349,369	$ 234,868	$ 16.09	41
Portsmouth	21,280	$ 4,526,743,144	$ 212,723	$ 16.11	42
Rye	5,336	$ 1,900,684,092	$ 356,200	$ 10.21	15
Seabrook	8,768	$ 2,393,624,563	$ 272,996	$ 15.21	37
South Hampton	810	$ 132,314,937	$ 163,352	$ 17.47	49
Stratham	7,280	$ 11,777,199,177	$ 1,617,747	$ 20.37	74
CEDS Eastern Communities	*100,328*	*$ 30,711,719,623*	*$ 306,113*	*$ 17.81*	*n/a*
Atkinson	6,732	$ 858,387,793	$ 127,509	$ 18.61	59
Auburn	5,154	$ 658,850,856	$ 127,833	$ 18.33	57
Brentwood	4,666	$ 503,452,982	$ 107,898	$ 23.97	134
Candia	3,919	$ 382,497,161	$ 97,601	$ 20.81	79
Chester	4,762	$ 484,059,366	$ 101,650	$ 24.31	144
Danville	4,436	$ 333,031,867	$ 75,075	$ 28.29	193
Deerfield	4,394	$ 483,202,693	$ 109,969	$ 25.32	159
Epping	6,617	$ 658,804,899	$ 99,562	$ 23.95	132
Fremont	4,432	$ 361,487,287	$ 81,563	$ 29.43	203
Hampstead	8,547	$ 979,943,155	$ 114,653	$ 24.36	145
Kingston	6,011	$ 615,470,604	$ 102,391	$ 24.21	141
Newton	4,734	$ 436,305,952	$ 92,164	$ 27.67	186
Northwood	4,252	$ 469,159,740	$ 110,339	$ 24.85	152
Nottingham	4,840	$ 528,436,825	$ 109,181	$ 22.03	97
Plaistow	7,563	$ 910,862,857	$ 120,437	$ 22.91	115
Raymond	10,210	$ 813,575,881	$ 79,684	$ 24.14	138
Sandown	6,184	$ 529,304,535	$ 85,593	$ 25.75	165
CEDS Central Communities	*97,453*	*$ 10,006,834,453*	*$ 102,684*	*$ 24.06*	*n/a*
Derry	32,988	$ 2,688,560,224	$ 81,501	$ 27.47	183
Hudson	24,538	$ 2,555,157,971	$ 104,131	$ 20.32	73
Litchfield	8,330	$ 790,696,845	$ 94,922	$ 21.14	85
Londonderry	24,209	$ 3,093,766,590	$ 127,794	$ 23.31	123
Merrimack	25,474	$ 2,903,304,538	$ 113,971	$ 24.05	135
Nashua	86,766	$ 8,386,760,928	$ 96,660	$ 22.31	104
Pelham	12,970	$ 1,428,377,883	$ 110,129	$ 22.34	106
Salem	28,688	$ 3,936,929,706	$ 137,233	$ 20.01	69
Windham	13,960	$ 2,135,023,621	$ 152,939	$ 22.82	113
CEDS Western Communities	*257,923*	*$ 27,918,578,306*	*$ 108,244*	*$ 22.64*	*n/a*
Hillsborough County	*402,606*		*$ -*		*n/a*
Rockingham County	*297,626*		*$ -*		*n/a*
New Hampshire	*1,323,262*	*$ 155,235,384,527*	*$ 117,313*	*$ 21.43*	*n/a*

Source: NH Department of Revenue Administration (comparison of effective tax rates);
Population estimates from NH OEP

Table F-3: ACS data: Per Capita Income

Town/Area	2010	2011	2012	2013	1-year change 2012 - 2013	% change 2012 - 2013
East Kingston	$42,114	$42,916	$43,887	$39,366	-$4,521	-10.3%
Exeter	$37,043	$38,018	$38,220	$37,972	-$248	-0.6%
Greenland	$42,017	$45,333	$53,652	$50,901	-$2,751	-5.1%
Hampton	$37,680	$41,022	$40,827	$41,913	$1,086	2.7%
Hampton Falls	$53,371	$57,770	$54,410	$59,712	$5,302	9.7%
Kensington	$39,837	$44,747	$49,509	$49,435	-$74	-0.1%
New Castle	$70,462	$83,682	$86,051	$82,879	-$3,172	-3.7%
Newfields	$43,346	$50,351	$52,774	$50,700	-$2,074	-3.9%
Newington	$39,115	$36,086	$37,970	$39,587	$1,617	4.3%
Newmarket	$33,399	$33,473	$32,032	$32,244	$212	0.7%
North Hampton	$45,595	$48,534	$57,216	$61,736	$4,520	7.9%
Portsmouth	$36,823	$39,344	$40,111	$39,839	-$272	-0.7%
Rye	$51,493	$56,171	$54,214	$52,866	-$1,348	-2.5%
Seabrook	$29,907	$30,218	$30,014	$30,156	$142	0.5%
South Hampton	$41,185	$41,922	$40,721	$41,425	$704	1.7%
Stratham	$45,238	$51,674	$53,833	$56,550	$2,717	5.0%
CEDS Eastern Communities	*$43,039*	*$46,329*	*$47,840*	*$47,955*	*$115*	*0.2%*
Atkinson	$41,588	$41,143	$39,628	$42,505	$2,877	7.3%
Auburn	$33,982	$34,811	$36,070	$38,501	$2,431	6.7%
Brentwood	$37,518	$37,385	$35,815	$37,506	$1,691	4.7%
Candia	$36,860	$36,809	$37,781	$36,618	-$1,163	-3.1%
Chester	$38,741	$36,954	$41,261	$39,816	-$1,445	-3.5%
Danville	$28,716	$29,699	$30,857	$31,443	$586	1.9%
Deerfield	$32,419	$36,278	$37,187	$36,150	-$1,037	-2.8%
Epping	$34,193	$30,179	$32,416	$32,406	-$10	0.0%
Fremont	$29,486	$29,274	$32,512	$36,331	$3,819	11.7%
Hampstead	$37,666	$38,704	$37,425	$39,530	$2,105	5.6%
Kingston	$29,267	$30,549	$30,025	$37,266	$7,241	24.1%
Newton	$31,969	$32,027	$32,207	$34,035	$1,828	5.7%
Northwood	$31,336	$32,300	$34,204	$35,153	$949	2.8%
Nottingham	$38,351	$39,431	$36,058	$36,367	$309	0.9%
Plaistow	$34,147	$35,390	$31,583	$31,204	-$379	-1.2%
Raymond	$27,468	$28,531	$28,149	$27,755	-$394	-1.4%
Sandown	$32,961	$33,208	$34,130	$37,507	$3,377	9.9%
CEDS Central Communities	*$33,922*	*$34,275*	*$34,548*	*$35,888*	*$1,340*	*3.9%*
Derry	$30,089	$31,254	$31,259	$30,397	-$862	-2.8%
Hudson	$32,157	$33,712	$34,615	$36,109	$1,494	4.3%
Litchfield	$33,847	$36,497	$37,412	$35,674	-$1,738	-4.6%
Londonderry	$36,096	$38,492	$37,865	$38,553	$688	1.8%
Merrimack	$36,574	$37,698	$40,093	$38,711	-$1,382	-3.4%
Nashua	$33,200	$33,032	$33,352	$32,874	-$478	-1.4%
Pelham	$35,328	$36,558	$37,594	$37,663	$69	0.2%
Salem	$33,751	$34,496	$35,290	$36,598	$1,308	3.7%
Windham	$46,071	$48,336	$49,552	$49,552	$0	0.0%
CEDS Western Communities	*$35,235*	*$36,675*	*$37,448*	*$37,348*	*-$100*	*-0.3%*
REDC CEDS region	*$37,676*	*$39,381*	*$40,233*	*$40,798*	*$565*	*1.4%*
Hillsborough County	*$33,108*	*$33,653*	*$34,208*	*$34,390*	*$182*	*0.5%*
Rockingham County	*$35,889*	*$37,422*	*$37,820*	*$38,399*	*$579*	*1.5%*
New Hampshire	*$31,422*	*$32,357*	*$32,758*	*$33,134*	*$376*	*1.1%*
United States	*$27,334*	*$27,915*	*$28,051*	*$28,155*	*$104*	*0.4%*

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

Note: the subregion and region values are averages of the towns reporting within that region.

Acronym Guide

ACS	American Community Survey
AMID	Advanced Manufacturing by Innovation and Design
AMPed	Advanced Manufacturing Partnerships in Education
AOC	Administrative Order on Consent
ATAC	Advanced Technology & Academic Center
CAAA	Clean Air Act Amendment
CART	Greater Derry-Salem Cooperative Alliance for Regional Transportation
CCSNH	Community College System of New Hampshire
CEDC	Coastal Economic Development Corporation
CMAQ	Congestion Mitigation and Air Quality
CSA	Community Supported Agriculture
CTAP	Community Technical Assistance Program
DRED	Department of Resources and Economic Development
EDA	Economic Development Administration
EDD	Economic Development District
ELMI	Economic & Labor Market Information Bureau
EPA	Environmental Protection Agency
FEIS	Federal Environmental Impact Study
FEMA	Federal Emergency Management Agency
GBCC	Great Bay Community College
NCC	Nashua Community College
NCRC	National Career Readiness Certificate
NECTA	New England City and Town Area
NHCS	New Hampshire Community Seafoods
NHDES	New Hampshire Department of Environmental Services
NHDOT	New Hampshire Department of Transportation
NHES	New Hampshire Employment Security
NHHFA	New Hampshire Housing Finance Authority
NHOEP	New Hampshire Office of Energy & Planning
NHTI	New Hampshire Technical Institute
NHRTA	New Hampshire Rail Transit Authority
NMFS	Northeast Marine Fisheries Service
NPDES	National Pollutant Discharge Elimination System
NRPC	Nashua Regional Planning Commission
OMB	United States Office of Management and Budget
PDA	Pease Development Authority
RFP	Requst for Proposal
RLF	Revolving Loan Fund
RPC	Rockingham Planning Commission or Regional Planning Commission
SBA	Small Business Administration
SBDC	Small Business Development Center
SCORP	Statewide Comprehensive Outdoor Recreation Plan
STEM	Science, Technology, Engineering, and Mathematics
TAC	Total Allowable Catch
TIF	Tax Increment Finance District
UNHCE	University of New Hampshire Cooperative Extension

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Map A-1: Regional Planning Commissions
REDC CEDS Region
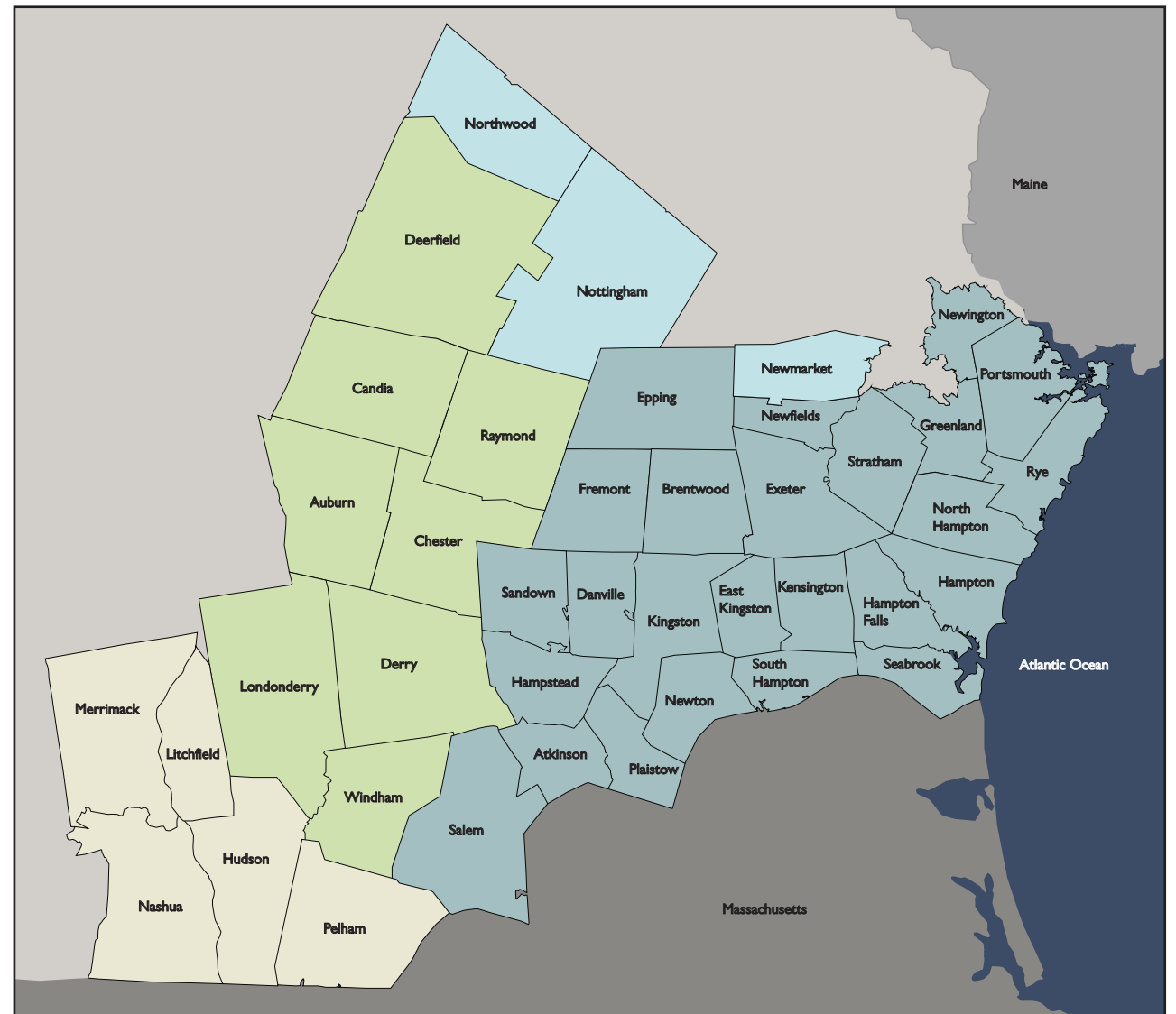
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Strafford RPC
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Rockingham RPC
156 Water Street
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603.778.0885
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REDC BOARD OF DIRECTORS

Executive Committee

William Davis, Chairman of the Board – Mr. Davis is Deputy Commander of the 157th Mission Support Group at Pease Air National Guard Base, as well as Chief of the NH National Guard's Congressional Affairs Contact Team. Mr. Davis was Newfields' Town and School Moderator for 13 years.

Scott Zeller Esq., Vice Chairman of the Board – Mr. Zeller is an entrepreneur who has started several local companies. He has used his background in law to aid local non-profits, such as the NH Music Chamber, with their formation. Each year Mr. Zeller travels to El Salvador to donate his time through the charitable organization Friends of ASAPROSAR (FoA), which provides critical eye care services to the local population. Mr. Zeller also served on the REDC Loan Committee for several years and sits on the board for a private charitable foundation based out of Las Vegas, NV.

Paul Deschaine, Secretary – Mr. Deschaine served as REDC's Treasurer for many years before transitioning to Secretary. He is the long time Town Administrator for Stratham, NH and is an active volunteer within the community. Mr. Deschaine is also an original incorporator of REDC.

Thomas Conaton , Treasurer – Mr. Conaton is a Senior Vice President and Business Banking Team Leader with Eastern Bank, and a member of the REDC Loan Committee. In addition to serving on the REDC Board, he has served on the Board of the SEE Science Center and the Home Health & Hospice Care. Mr. Conaton is also a 2012 graduate of the Greater Manchester Leadership Program.

Board Members

Robert McDonald – Mr. McDonald is a Senior Credit Officer with Santander Bank and serves on the REDC Loan Committee. He is also actively involved in local economic development in NH as a long-time member of the Londonderry Housing and Redevelopment Authority.

David Bickford – Mr. Bickford recently retired from Public Service of NH (PSNH) as the Director of Customer Operations. He has also served the region as a Board Member of the Greater Portsmouth Chamber of Commerce, Seacoast Family YMCA, and the Town of Dover Chamber. Also, Mr. Bickford is a graduate of Leadership Seacoast and Leadership NH.

George Sioras – Mr. Sioras is the Planning and Community Development Director for the town of Derry, NH. He works closely with Derry businesses to facilitate economic development, as well as acts as a liaison for the Derry Revolving Loan Fund (DRLF), which REDC helps run. Mr. Sioras is also on the Board of Directors of CART (Greater Derry-Salem Cooperative Alliance for Regional Transportation). CART is a non-profit public transit agency serving towns in the Derry-Salem area which provides access to medical care, employment, and other basic life needs for transit-dependent individuals.

Carol Estes – Ms. Estes is a Vice President, Middle Market Lender with Kennebunk Savings, as well as a member of the REDC Loan Committee. Ms. Estes was also the NH SBA 504 Lender of the Year for 2010 & 2012. In addition, Ms. Estes is actively involved with NH Workforce Housing Charettes and the United Way of the Greater Seacoast.

Craig Jewett – Mr. Jewett is President of Jewett Construction Co., Inc., which is a second generation, family-run company based in Raymond, NH. He holds a Bachelor of Science in Environmental Planning from Slippery Rock University. Mr. Jewett is also involved in the Town of Raymond Economic Development Committee, CHaD All-Star Football Finance Committee, New Hampshire Businesses for Social Responsibility, Exeter Chamber of Commerce Board of Directors, Daniel Webster Council Boy Scouts of America Board of Directors, New Hampshire Automobile Dealers Association, Jack Miller Network, and the U.S. Green Building Council.

The Regional Economic Development Center is a non-profit regional development corporation located in southern New Hampshire. REDC serves new, growing, and challenged businesses within our service territory. Whether you need to find a lending partner, finance an expansion, or need assistance with restructuring, REDC can help. REDC assists municipalities with strategic planning, economic development training, and assistance with infrastructure projects through the Comprehensive Economic Development Strategy (CEDS).

REDC
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