



# MAHONING VALLEY MARKET PULSE™

Issue #12 • Week of May 25, 2026

**FROM THE EDITOR:** Youngstown's advanced-manufacturing ecosystem was further validated this week when a former Pentagon principal director called the city "ground zero" for additive manufacturing at YBI's AMUX event. Concurrently, America Makes announced defense-focused additive-manufacturing awards and the Youngstown Innovation Hub continued positioning itself as an integrator for aerospace, defense, autonomy, workforce, and commercialization. Elsewhere, Graphite One's move from Weathersfield to Conneaut underscored power, rail, port access, and shovel-ready infrastructure decides where major industrial growth lands. Across the region, WRPA contracts worth \$11 million, East Liverpool's \$40 million Route 39 corridor, Salem's five-year strategy, Castlo road funding, and Columbiana County's downtown programs all point to the same conclusion — the Valley's opportunity is real and execution capacity is the engine for growth.

All items sourced May 18–24 unless marked **[ONGOING]** for developing stories from prior weeks. Capital Pipeline Tracker and Economic Indicators are cumulative reference tables updated weekly.

## ON DECK — MAY 25 - MAY 31

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*Monday May 25 is Memorial Day. Verify county offices for rescheduled meetings.*

- **Mon, May 25 — MEMORIAL DAY.** Federal/state/county offices closed.
- **Tue, May 26 — Trumbull County Commissioners Workshop (10:30 AM).**
- **Tue, May 26 — Ashtabula County Commissioners (AM, Jefferson).**
- **Wed, May 27 — Ohio Joint Data Center Committee First Hearing (Columbus).** Eight members, bipartisan. Co-chairs: Rep. Adam Holmes (R-Nashport), Sen. Brian Chavez (R-Marietta). Companies including Google and Meta invited to testify. Streamed on Ohio Channel. [Spectrum News 1](#)
- **Wed, May 27 — Trumbull County Commissioners Regular Meeting (10:30 AM).**
- **Wed, May 27 — Columbiana County Commissioners (9:00 AM, Lisbon).**
- **Thu, May 28 — Ohio Joint Data Center Committee Second Hearing (Columbus).**
- **Thu, May 28 — Niles Riverside Park Grand Opening & Ribbon Cutting (12:00 PM).** \$3.5M Appalachian Community Grant project. [Eastgate COG](#)
- **Thu, May 28 — Mahoning County Commissioners (10:00 AM, courthouse).**
- **Fri, May 29 — Regional Chamber Data Center Overview Webinar with TPMA (12:00–1:00 PM).** [Regional Chamber Events](#)

## MARK YOUR CALENDAR

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- **Mon, June 1 — Columbiana County Downtown Building Renovation & Signage Program applications open.** \$250K GOA/Appalachian Development Program award. Seven walkable downtowns: Columbiana,

East Liverpool, East Palestine, Leetonia, Lisbon, Salem, Wellsville. Forgivable loans up to \$50K; signage grants up to \$5K. Applications at [ccpa-ohioriver.com](http://ccpa-ohioriver.com). [Salem News](#)

- **Wed, June 3 — Youngstown City Council Regular Meeting (7:00 PM).** Salt Springs Road Business Park sewer vote expected. [Vindicator](#)

## LEAD STORY

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• **Youngstown Called “Ground Zero” for Additive Manufacturing.** At YBI’s Advanced Manufacturing User Expo on Wednesday, Dr. Jaret C. Riddick — former Pentagon principal director of autonomy — described Youngstown as “ground zero” for additive manufacturing, citing the city’s role in the founding of NAMII/America Makes and the ecosystem now forming around YBI, YSU, America Makes, regional manufacturers, and the Youngstown Innovation Hub for Aerospace and Defense. YBI CEO Barb Ewing said the daylong event was designed to show manufacturers — from traditional shops to emerging tech firms — how advanced manufacturing tools can strengthen operations and open new markets. Topics covered advanced manufacturing, emerging technologies, digital transformation, workforce, defense and aerospace, and startups. **Impact for CRE and the Chamber:** This is a site-selection story. Advanced manufacturing, defense supply chains, autonomy, aerospace, additive production, legacy manufacturer modernization, and workforce development are converging around a place-based innovation ecosystem in Youngstown. The AMUX lead, paired with America Makes’ defense awards and the Innovation Hub’s continued buildout, positions the Valley’s additive-manufacturing base as a major asset cluster. [PRNewswire](#) · [BJD](#) · [Vindicator](#) · [Tribune Chronicle](#)

## STRATEGIC SIGNALS

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• **America Makes Announces \$1.7M Defense Additive-Manufacturing Awards (Wed, May 20).** America Makes and NCDMM announced the winners of the Joint Additive Qualification for Sustainment – Supplier Qualification (JAQS-SQ) Group 1 project call, totaling \$1.7M. Funded through the Office of the Under Secretary of War, Manufacturing Technology Office, the program accelerates integration of non-traditional suppliers into the defense additive manufacturing supply chain. Group 1 includes six suppliers focused on laser powder bed fusion: 3D Systems, Alloyed Inc., Howco Additive, Rennscot LLC, Velo3D, and Divergent Technologies. Groups 2 and 3 awards anticipated this summer. **Impact:** Paired with the AMUX lead, this is the Valley’s advanced-manufacturing ecosystem producing real defense-industrial-base results. America Makes, headquartered in Youngstown, remains the national accelerator for this work. [NCDMM](#) · [3D Printing Industry](#) · [BJD](#)

• **Graphite One Shifts to Conneaut for \$1.4B Anode Materials Plant (Mon, May 19).** Graphite One formalized its relocation from Weathersfield Township to Conneaut, Ashtabula County. The company cited challenges establishing power infrastructure at the Warren-area site within its construction timeline. The Conneaut property, secured through a license-of-occupation agreement with Bessemer and Lake Erie Railroad (CN subsidiary), offers Lake Erie/Great Lakes shipping, multi-line rail connectivity, existing power infrastructure, and an on-site substation. The move further affirms that power and shovel-readiness are first-order site-selection criteria. Phase One targets Q4 2027 completion with 10,000-tonne annual active anode material capacity for EV batteries, grid-scale storage, and data center infrastructure. Phase Two: 25,000 tonnes/year by Q3 2028. Full investment: \$1.4B Phase One / \$3.9B buildout. Conneaut remains inside the Lake to River Economic Development footprint. Regional Chamber President Guy Coviello: the move “creates many procurement and supply chain opportunities throughout the area.” Alaska mine permit decision (FAST-41) due September 29, 2026, which unlocks up to \$2B in federal financing. [PRNewswire](#) · [WKBN](#) · [Tribune Chronicle](#) · [Vindicator](#) · [Regional Chamber](#)

• **WRPA Moves \$11M+ in Public Assets from Planning to Execution (Wed, May 20).** The Western Reserve Port Authority board approved multiple contracts: **\$6.98M** to B&B Contractors and Developers (Youngstown) for YNG Aviation Education Center construction at Youngstown-Warren Regional Airport (contingent on EDA and FAA notices to proceed; ~14-month project). **\$3.38M** design contract for the Mahoning County Government Center. **\$516,777** owner’s representative contract for the Government Center. **Air Heritage Trail contracts** approved. **Clark Bar building sale (\$300K)** approved for the proposed Catalyst Creative Center. **Natural gas pipeline feasibility study** update — Eastgate COG-commissioned study for a pipeline running north from Columbiana County through Mahoning and Trumbull to Ashtabula along SR 11/7, addressing service gaps, supporting gas-fired power plants, enabling LNG shipping. Public-private partnership model under evaluation. **Impact:** Aviation workforce, county government consolidation, heritage tourism, downtown creative space, and energy infrastructure — all advancing simultaneously. [BJD](#)

• **East Liverpool Route 39 Corridor: \$40M Reconstruction Advances (Thu, May 22).** ODOT held a public open house for the nearly \$40 million reconstruction of State Route 39, stretching from Mulberry Street to the Pennsylvania state line. The project, backed by a \$29.7M federal Rural Surface Transportation Grant (December 2023) and a \$1.9M ODOT engineering award (January 2026), includes full roadway rebuild, sidewalks, signage, pedestrian crossings, lighting, storm sewers, and a roundabout at Parkway Avenue and Pennsylvania Avenue. The city still needs approximately \$7 million for its local match. Groundbreaking targeted for spring 2028 pending funding. As many as 180 right-of-way acquisitions anticipated. **Impact:** Cross-border infrastructure, federal leverage, distressed-river-city reinvestment, and major corridor improvement combine for the kind of project that demonstrates regional execution capacity. [WTOV9](#) · [WKBN](#)

• **Salem Unveils 2026–2031 Economic Development Plan (Wed, May 20).** The City of Salem and Sustainable Opportunity Development Center released an 80-page plan: Salem climbed from 84th to 12th among top U.S. micropolitan areas (Site Selection Magazine). Downtown vacancies fell 77%. Building permit timelines dropped from six months to six days. \$2.3M in competitive downtown-rehab grants secured since 2021. Annual income tax collections rose \$1.55M (+25%). 65 acres at Salem Industrial Park environmentally cleared and ready. \$305M+ in annual unmet consumer demand identified (Retail Strategies). Projected shortage of 316 housing units by 2030, with “missing middle” housing specifically identified. **Why it matters:** Salem is quantifying its gaps and turning them into a playbook. [WFMJ](#) · [BJD](#)

WATCH

**Execution Capacity Becomes the Real Differentiator.** Youngstown’s additive-manufacturing ecosystem is drawing national validation, while Graphite One’s move from Weathersfield to Conneaut affirms that investment will follow power, rail access, ready sites, utility certainty, workforce pipelines, and public-sector execution. This week’s developments — from AMUX and America Makes to WRPA contracts, East Liverpool’s Route 39 corridor, Salem’s five-year strategy, Castlo road funding, and Columbiana County’s downtown programs — all point to converting assets into capacity.

POWER, DATA & SITE READINESS

• **Niles Becomes Fifth Active Moratorium Jurisdiction (Wed, May 20).** Niles City Council unanimously approved a 180-day moratorium on data center permits following Bitdeer Technologies’ April 15 presentation proposing an AI data center. Council also approved hiring CodeCraft Planning Studio to draft restrictive data center zoning language. [Tribune Chronicle](#) · [WKBN](#)

• **Hubbard Prepares One-Year Moratorium Legislation (May 19).** Hubbard City Council requested emergency legislation for a one-year moratorium on data center construction, placement, or operation. More than 200 residents attended. No formal proposal has been received. Vote expected at June 1 council meeting. [Tribune Chronicle](#)

• **Southington Considering Moratorium (May 21).** Southington Township officials are considering a data center moratorium; zoning board expected to review. This keeps the governance wave active across Trumbull County. [Tribune Chronicle](#)

| Jurisdiction      | Type                     | Date        | Duration          |
|-------------------|--------------------------|-------------|-------------------|
| Lordstown         | Twp moratorium           | Feb 2026    | 180 days          |
| Weathersfield     | Twp moratorium           | Mar 2026    | 180 days          |
| Bazetta           | Twp moratorium           | May 15      | 180 days          |
| Niles             | City moratorium          | May 20      | 180 days          |
| Hubbard           | City legislation pending | June 1 vote | 1 year (proposed) |
| Southington       | Under consideration      | TBD         | TBD               |
| Mahoning Twp (PA) | Strengthened ordinance   | Apr 2026    | Permanent         |

• **Ohio Joint Data Center Committee — First Hearings Wed–Thu, May 27–28.** Bipartisan, bicameral committee will hold first public hearings streamed on Ohio Channel. Members include Rep. Heidi Workman (R-Rootstown), connecting to the Valley’s Portage County border. Additional legislation: HB 646 (study commission) in Senate committee; HB 706 (utility requirements) referred to House Energy Committee. [Spectrum News 1](#)

- **[ONGOING] Keel Infrastructure — Sharon.** Zoning board approved \$5B expansion in late April (70-dB noise cap, no river water use). Keel (formerly Bitfarms) plans 110MW AI data center on 18-acre former Westinghouse site. Sharon Planning Commission drafting new zoning ordinance with data center provisions (closed-loop cooling required). Still needs: Mercer County Regional Planning Commission → Sharon Planning Commission → City Council. Construction target: October 2026 if all approvals received. [WKBN](#) · [WFMJ](#)

For a closer look at the power, zoning, and economic considerations influencing data center projects in the Mahoning Valley, download our white paper: [The Data Center Dilemma →](#)

## DOWNTOWN YOUNGSTOWN

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- **Kurz & Schwartz Buy Third Downtown Building (Mon, May 18).** Attorneys Jeff Kurz and Brad Schwartz, who own the O'Donnell's and Imbibe buildings, purchased the former Connection building (previously Baker's Shoes). Plans include coffee shop, boutique retail, and office space targeting businesses outgrowing the Youngstown Business Incubator. [WKBN](#)
- **Historic Tax District Proposed — Up to 55% Combined Credits (May 13/May 23).** Kurz presented a proposal to City Council's CPED committee for a federal historic tax district downtown. The designation would make 39 buildings eligible for up to 55% combined state (35%) and federal (20%) tax credits on qualified rehabilitation expenditures. Economic Development Director Stephanie Gilchrist affirmed the city's interest on WFMJ Weekend Today. [WYTV](#) · [WFMJ](#)

## INFRASTRUCTURE & UTILITIES

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- **Castlo Industrial Park Road Funding (Wed, May 20).** ODOT awarded Castlo CIC a \$350,000 Roadwork Development Grant for a \$537,440 project to reconstruct and widen approximately 4,000 linear feet of roadway beginning at Bob Cene Way. The project supports Lindy Paving's facility and a reported 500% increase in heavy truck traffic. Road hasn't been resurfaced in 28 years. Expected to support 60 jobs. [BJD](#)
- **Pier 48 — \$440,683 Federal Marine Highway Grant (Mon, May 19).** The Columbiana County Port Authority received a \$440,683 U.S. Marine Highway Grant from MARAD for Pier 48 at the Wellsville Intermodal Facility to purchase two diesel-over-hydraulic clamshell buckets for the overhead gantry crane, replacing equipment manufactured in 1979. The \$132,816 ODOT Maritime Assistance Program grant was used as matching share. [BJD](#)
- **[ONGOING] Youngstown Dam Removal Advances.** Board of Control approved agreement with Ohio EPA for up to \$3.5M toward removal of three low-head dams in the Mahoning River (Center, Marshall, Crescent streets). Total project cost up to \$6.125M. Expected construction timeline: approximately 2.5 years. [BJD](#)
- **Struthers-Mahoning County Sewer Dispute Blocks Housing (Sat, May 17).** A 16-home villa development on U.S. Route 224 in Poland Township ("Hines Run," developer David Kosec/Hengst LLC) remains stalled by a sewer-capacity dispute between Struthers and Mahoning County tracing back to a 1979 cost-sharing agreement. Struthers Mayor Catherine Cercone Miller: "We can't accept any new flow." Direct CRE impact: infrastructure disputes at municipal boundaries freeze otherwise market-ready residential sites. [Vindicator](#)
- **Salt Springs Road Business Park — Watch for June 3.** Youngstown City Council delayed voting on up to \$1.95M in sanitary sewer improvements for the Salt Springs Road Business Park. Top Property Holdings interested in a 12.1-acre Exal Court site with concept of up to 200,000 SF. Council requested more information; next regular meeting June 3. [Vindicator](#)

## WORKFORCE & TALENT

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- **Lake-to-River Wage and Benefits Survey Launching Late May.** Lake to River Economic Development will launch a wage and benefits survey with collection open through July and results expected late August. Target sectors: manufacturing, distribution, technology, professional services, and health care. Participating firms receive the final report. [BJD](#)

## RETAIL, RESTAURANT & TOURISM

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- **Salem Plan Identifies \$305M+ Retail Opportunity Gap.** Salem's five-year plan identifies more than \$305 million in annual unmet consumer demand, with opportunity gaps in food service, building materials, furniture, and home goods. Community survey: 60% of respondents believe shopping options need improvement; 38% believe restaurant options need improvement. [BJD](#)

- **Columbiana County Downtown Programs Launch June 1.** CCPA's \$250K Appalachian Development Program-funded downtown programs open for applications June 1. Building renovation forgivable loans up to \$50K (50% of project costs); signage grants up to \$5K (50% reimbursement, first-come first-served). Seven walkable downtowns eligible. Applications due August 31; awards anticipated October 1. [Salem News](#) · [Review](#)

## ECONOMIC INDICATORS

| Indicator          | Value     | Prior  | Change / Notes                                                              |
|--------------------|-----------|--------|-----------------------------------------------------------------------------|
| Ohio statewide     | 3.9%      | 4.1%   | Apr '26. ↓ 0.2 pts. LFP fell to 61.9%. (ODJFS May 22)                       |
| Mahoning Co.       | 5.3%      | 6.2%   | Mar '26. No new county data. (Ohio LMI)                                     |
| Trumbull Co.       | 5.6%      | 6.6%   | Mar '26. No new county data. (Ohio LMI)                                     |
| Columbiana Co.     | 4.4%      | 5.4%   | Mar '26. No new county data. (Ohio LMI)                                     |
| Ashtabula Co.      | 4.5%      | 5.2%   | Mar '26. No new county data. (Ohio LMI)                                     |
| Lawrence Co. PA    | 5.1%      | —      | Feb '26. Mar data not yet released. (PA L&I)                                |
| Mercer Co. PA      | 4.6%      | —      | Feb '26. Mar data not yet released. (PA L&I)                                |
| US unemployment    | 4.3%      | 4.3%   | Apr '26. Flat. May data due June 5. (BLS)                                   |
| CPI Inflation      | 3.8% YoY  | —      | Apr '26. Gas-driven. Next release June 10. (BLS, May 12)                    |
| US Crude Oil (WTI) | ~\$91/bbl | ~\$106 | Brent ~\$103. ↓ 14% weekly. Iran deal progress. (Trading Economics, May 25) |
| S&P 500            | 7,473     | ~7,400 | Near ATH of 7,517 (May 14). (Investing.com, May 22)                         |

Sources: ODJFS Apr 2026 (May 22). Ohio LMI Mar 2026 LAUS (county). PA L&I Feb 2026 (county). BLS Employment Situation (May 8). CPI: BLS (May 12). Oil: Trading Economics (May 25). S&P: Investing.com (May 22).

## CAPITAL PIPELINE TRACKER

Cumulative reference table updated weekly. Color key below. \* = updated this issue. NEW = added this issue.

| Project                       | Invest.    | Jobs       | Status                                                  | County    |
|-------------------------------|------------|------------|---------------------------------------------------------|-----------|
| SoftBank/Stargate — Lordstown | \$3B+      | TBD        | Site work visible; online '27                           | Trumbull  |
| Kimberly-Clark — Warren Mfg   | \$800M     | ~500       | 1.2M SF on 560 ac; room to grow                         | Trumbull  |
| K-C Distribution Center       | \$160M     | 65         | Board Decision Pending                                  | Trumbull  |
| * Keel Data Center — Sharon   | \$5B       | 134        | Zoning approved w/ conditions; PC drafting DC ordinance | Mercer PA |
| * Graphite One — Conneaut     | \$1.4B     | 150+       | Relocated from Weathersfield; Q4 2027 target            | Ashtabula |
| Arclight — Lordstown 161 ac   | \$3.9M     | TBD        | Acquired; no plans disclosed                            | Trumbull  |
| FirstEnergy Grid — Trumbull   | \$24M      | —          | 138-kV rebuild; part of \$36B Energize365               | Trumbull  |
| Warren Steel Site             | \$15M loan | —          | Foreclosure; 360 ac industrial                          | Trumbull  |
| * Bitdeer Data Center — Niles | TBD        | TBD        | 180-day moratorium passed May 20                        | Trumbull  |
| Everest Aluminum — Warren     | \$19.5–33M | 70         | Tax abatement approved; 90-day decision                 | Trumbull  |
| Innovation Hub — A&D          | \$62M      | 450 by '29 | Reno Start Summer '26                                   | Mahoning  |
| Mercy Health — Champion ER    | \$50M      | 75         | Steel Rising; Q4 '26                                    | Trumbull  |
| Vallourec — Premium Thread    | \$48M      | 40         | Commissioning Q1 '27                                    | Mahoning  |
| EOG/Encino — Utica Drilling   | \$6.5B     | 1,000s     | 3 rigs; top-tier priority                               | Regional  |

|                                       |             |              |                                                          |            |
|---------------------------------------|-------------|--------------|----------------------------------------------------------|------------|
| Ultium Cells (Lordstown)              | \$2.3B      | ~900         | 1,000+ idled; Q3 recall possible                         | Trumbull   |
| Litco International — Lordstown       | TBD         | TBD          | 40K SF; operational                                      | Trumbull   |
| McDonald Steel Site                   | \$3.25M     | —            | 51.8 ac cleared; sale Jul–Oct '26                        | Trumbull   |
| L2R Project Pipeline                  | \$860M+     | 685          | 2025: \$860M invested; \$62.7M payroll                   | Regional   |
| Youngstown REDD Infill                | \$2.5M      | 220 units    | Awarded Mar 6                                            | Mahoning   |
| Warren Peninsula Project              | \$851K      | 306 units    | Awarded Mar 6                                            | Trumbull   |
| Mahoning Nat'l Bank Bldg              | \$18.5M     | 71 units     | Crane placed; reno active                                | Mahoning   |
| * Mahoning Co. Gov't Center           | \$60M       | 400+         | WRPA approved \$3.38M design + \$517K rep; demo bid June | Mahoning   |
| Hollywood Gaming — Austintown         | Multi-M     | —            | Patio expansion; 3K SF + 100 VLTs                        | Mahoning   |
| S.E.T. Sewer Interceptor Ph. 1        | \$5.44M     | —            | Final cost approved; 35.5M gal overflow eliminated       | Mahoning   |
| Project Milo — Hubbard                | TBD         | TBD          | L2R/JobOhio; NDA; 1-yr moratorium pending                | Trumbull   |
| Ashore/Concept-4 — Berlin Ctr         | TBD         | TBD          | Precision machining; AS9100 path; defense                | Mahoning   |
| Brownfield — YMCA Ytown               | \$1M        | —            | Transitional housing + youth development; funded         | Mahoning   |
| Brownfield — Warren YMCA              | \$635K      | 43 + 7 units | Mixed-use conversion; remediation funded                 | Trumbull   |
| Brownfield — Van Huffel               | \$300K      | 53 potential | Phase II assessment; mfg expansion                       | Trumbull   |
| Brownfield — Miller Holzwarth         | \$1M        | —            | Shovel-ready industrial; 2.8 ac; Salem                   | Columbiana |
| * Dam Removals — Youngstown           | \$6.125M    | —            | BOC approved OEPA agreement (\$3.5M); const. mid-2027    | Mahoning   |
| NEW YNG Aviation Ed Center            | \$6.98M     | —            | Contract approved; EDA/FAA notice pending; ~14 mo.       | Trumbull   |
| NEW East Liverpool Route 39           | ~\$40M      | —            | \$29.7M federal grant; \$7M local match needed; 2028     | Columbiana |
| NEW Castlo Industrial Park Road       | \$537K      | 60           | \$350K ODOT grant; Lindy Paving support                  | Mahoning   |
| NEW Pier 48 Equipment — Wellsville    | \$573K      | —            | \$441K MARAD + \$133K ODOT grants                        | Columbiana |
| NEW Catalyst Creative Ctr / Clark Bar | \$300K sale | —            | WRPA-approved; creative center proposed                  | Mahoning   |

Green = construction Yellow = planning Blue = awarded Purple = renovation Red = paused/distressed \* = updated NEW = added this issue

## Mahoning Valley Market Pulse™

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