



MAHONING VALLEY MARKET PULSE™

Issue #15 • Week of June 15, 2026

FROM THE EDITOR: Last week, local municipalities stepped in as state legislators stepped back. At the Statehouse, an eleventh-hour effort to put guardrails on Ohio's data-center boom collapsed over a tax-break fight — so Valley townships kept doing the regulating themselves, with Howland the latest to hit pause. A court-appointed receiver detailed how close downtown Youngstown's steam system is to going cold, and City Council moved to ask Columbus for help. The House sent a nearly \$4 billion capital budget to the governor with money bound for the Valley. And in Columbiana and Mercer Counties, familiar questions raised: who pays for the power, who pays for the water, and who decides.

All items sourced June 8–14 unless marked **[ONGOING]**. The Capital Pipeline Tracker and Economic Indicators are cumulative reference tables updated weekly.

ON DECK — JUNE 15–21

- **Mon, June 15** — Lordstown public hearing on a proposed 180-day data-center moratorium extension (Bristolville 25 / \$3.6B mandamus).
- **Tue, June 16** — Trumbull County Commissioners workshop, 10:30 a.m. (Warren).
- **Tue, June 16** — Ashtabula County Commissioners work/agenda session, 9:00 a.m. (Jefferson).
- **Tue, June 16** — Lawrence County (PA) Commissioners, 10:00 a.m. (New Castle).
- **Wed, June 17** — Trumbull County Commissioners regular meeting, 10:30 a.m. (Warren).
- **Wed, June 17** — Columbiana County Commissioners, 9:00 a.m. (Lisbon).
- **Wed, June 17** — Youngstown City Council: second reading on the \$130K SOBE viability study (Roetzel & Andress) plus a resolution declaring a "local energy and public utility emergency."
- **Thu, June 18** — Mahoning County Commissioners, ~10:00 a.m.
- **Thu, June 18** — Mercer County (PA) Commissioners, 3:00 p.m. (Mercer).
- **Fri, June 19** — **Juneteenth (federal holiday)**. Courts and county offices closed; may shift any Friday meetings.

County commissioner meetings follow each county's standard weekly schedule; confirm against posted agendas.

MARK YOUR CALENDAR

- **Wed, June 24** — Ohio House may reconvene on the HB 646 data-center bill (Senate will not).
- **Wed, June 25** — PennDOT NEVI Community Charging (Western PA) webinar, 1 p.m. [PennDOT](#)
- **Fri, June 26** — Graphite One 2026 Annual General & Special Meeting (Conneaut/Ashtabula site).

LEAD STORY

SOBE's fall deadline: receiver warns downtown Youngstown's steam system could run out of time by October

City Council is considering a resolution asking Columbus for help. Receiver John C. Collins, who replaced Reg Martin on Feb. 17, has reported that SOBE **owes roughly \$4 million to creditors** and takes in about **\$130,000 a month against roughly \$220,000 in expenses**, and that the **\$750,000 Enbridge settlement fund** (from the 2024 Realty Tower explosion) covering its rented boilers will be exhausted by **September or October**. Collins filed for an emergency PUCO rate increase on May 21; six days later the commission directed its staff to prepare an emergency-rate report.

The city is weighing a **\$130,000 payment to hire Roetzel & Andress Associates** — an Akron firm whose work would be led by Marc Divis of Akron Energy Systems, who helped untangle Akron's and Cleveland's steam systems — to assess SOBE's viability. Council gave that a first reading June 10 and takes it up again, alongside a resolution declaring a "local energy and public utility emergency," at its **June 17 meeting**. Meanwhile SOBE sent a 10-day disconnection notice to Wick Tower over a disputed \$25,913.52 bill. Gov. DeWine's office says he is monitoring but can't tap the capital budget or rainy-day fund, and Rep. Lauren McNally says SOBE can't qualify for capital dollars as a private, bonded entity. The system that has heated downtown for generations — **23 customers**, several of them city-owned buildings — now has only months of boiler funding left, with a full rebuild estimated near \$30 million.

• **Sources:** [Vindicator](#) • [BJD](#) • [WKBN](#) • [WYTV](#)

STRATEGIC SIGNALS

- **1. Ohio's data-center guardrails die at the Statehouse — Howland becomes the next Valley township to act alone.** An eleventh-hour push to send data-center regulations to Gov. DeWine before summer recess **died late June 10**, when House objections to extending the sales-tax break killed negotiations on HB 646 — a bill that would have cut the sales-tax exemption to 50–75%, capped local abatements at 50%, created a PUCO data-center rate class, and regulated water use. It is now unlikely to see action before November (the House could reconvene June 24; the Senate will not). With no state framework coming, **Howland trustees approved a six-month renewable moratorium on June 11** — the latest in a Trumbull-centered wave that days earlier saw Cortland's council give emergency passage to a full one-year data-center moratorium (June 1). [Statehouse News \(6/9\)](#) • [Statehouse News \(6/11\)](#) • [Tribune \(Howland\)](#) • [Tribune \(Cortland\)](#)
- **2. Ohio's ~\$4B capital budget clears the House and heads to DeWine — with Valley dollars inside.** The House passed **SB 450 on June 10**: ~\$3.7–4 billion total, \$208 million across 815 community projects in all 88 counties. Verified Valley line items include **YSU's \$10.7M main campus plus \$3.5M for YSU-Steubenville**; ~\$2.47M across 10 Mahoning County projects (including \$750K for the Youngstown Innovation Hub for Aerospace and Defense); more than \$3M across 12 Trumbull County projects (\$1.47M parks/athletics, \$450K regional fire-training, \$400K Akron Children's Warren, \$250K Medici Museum); Salem's \$600K Lincoln Plaza expansion and a \$2.9M Columbiana County Annex/Drug Task Force building; and \$450K each for Kent State's East Liverpool and Salem branches. [BJD](#) • [Tribune](#) • [Ohio House](#)
- **3. The \$3.6B Lordstown data-center fight in focus — today.** Developers behind the **Bristolville 25** project asked the Ohio Supreme Court on ~June 8 to take judicial notice of Lordstown's latest maneuver: a **June 15 public hearing to extend the village's moratorium another 180 days**, which would push the freeze on the \$3.6B project — 133 acres in Trumbull and Mahoning counties, 1,600 construction and 120 permanent jobs projected — through year-end against a September construction target. The original moratorium expires July 4. [WFMJ](#)

POWER, DATA & SITE READINESS

The state hesitated; the townships didn't. Columbus tried and failed to set statewide rules. HB 646's collapse means the 100% sales-tax exemption stands untouched for now — and the multi-decade contracts Amazon, Meta and Google signed under the Kasich administration run through **2055, 2056 and 2058**, insulating roughly three-quarters of the market from any future change. Lawmakers also acknowledged the state underestimated the 2025 cost of the exemption by more than \$1.4 billion. [Statehouse News](#)

The Valley's data-center moratorium wave. At least 11 jurisdictions across the region have enacted pauses. (PA municipalities can't impose true moratoriums under state law, so the Lawrence County items are restrictive zoning ordinances.)

Jurisdiction	County	Term	Status
Cortland (city)	Trumbull OH	1 year	Enacted (emergency) June 1
Howland Twp	Trumbull OH	6 mo	Enacted June 11
Braceville Twp	Trumbull OH	6 mo	Enacted early June
Hubbard (city)	Trumbull OH	12 mo	Enacted early June
Hubbard Twp	Trumbull OH	12 mo	Enacted Feb
Niles (city)	Trumbull OH	6 mo	Enacted mid-May
Weathersfield Twp	Trumbull OH	6 mo	Enacted
Vienna Twp	Trumbull OH	6 mo	Enacted (spring)
Bazetta Twp	Trumbull OH	180 days	Enacted mid-May
Lordstown (village)	Trumbull OH	6 mo +ext.	Enacted Jan; June 15 extension hearing
Boardman Twp	Mahoning OH	1 year	Enacted April
Mahoning Twp	Lawrence PA	zoning ord.	Enacted April (zoning, not moratorium)
North Beaver Twp	Lawrence PA	zoning ord.	Enacted April (zoning, not moratorium)
Warren (city)	Trumbull OH	perm. ban	In process — 1st reading/committee

Sources: Cortland City Council O-21-26 + Tribune; Tribune (Howland); WFMJ (Braceville, Hubbard); WKBN (Niles, Weathersfield, Vienna); WFMJ (Lordstown); Vindicator (Boardman, Bazetta); WKBN/CNHI (Mahoning Twp, North Beaver Twp PA). Bazetta Twp's moratorium is distinct from the tracker-only Amazon-Bazetta DC project.

- **Howland's JEDD question.** Howland trustees, in passing their moratorium, raised whether it reaches land governed by the separate Warren-Howland-Warren JEDD board, which oversees the site of Kimberly-Clark's \$800M plant — an open jurisdictional question. [Tribune](#)
- **Site readiness is the scarce product (Columbiana).** With the Columbiana County Port Authority's parks full — 45 shovel-ready acres at the World Trade Park in Leetonia and six at the Wellsville Intermodal Facility (Exec. Dir. Brittany Smith) — the city of Columbiana is pursuing a second park and a spec building (City Manager Lance Willard), Salem's SOD Center is redeveloping the former Miller-Holzwarth brownfield (Julie Needs), and East Palestine's CIC holds a one-year option on 85 acres for a 400,000–800,000-SF park (Antonio Diaz-Guy). [BJD](#)
- **EV charging expands PA footprint.** PennDOT released NEVI Community Charging Round 2 for Western Pennsylvania on June 12 — \$25M of a \$100M statewide program — with **Mercer and Lawrence** among eligible counties; proposals run a Sept. 8–Nov. 20 eGrants window (webinar June 25), grants averaging ~\$500K, awards expected early 2027. [PennDOT](#) · [BJD](#)
- **Niles — \$402,500 ARC POWER grant for electrical capacity (June 8).** An Appalachian Regional Commission POWER Initiative grant (Eastgate-assisted) will expand power capacity in the city's west-side industrial area to support a BRT Extrusions expansion projected at ~30 direct jobs. [BJD](#)
- **[ONGOING] Zuharis "Project Astralus," Yellow Creek Township (Columbiana).** A 510-acre data center with its own power plant and Ohio River water, target Q3 2027; ~100 residents attended a May 28 information meeting (pre-window).
- **Joint Data Center Committee** continues; Development Director Lydia Mihalik said the state could try to renegotiate the legacy Big Tech contracts but conceded the companies will decide on their own terms. [Statehouse News](#)

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 →](#)

- **Career Navigator** — eight Trumbull County districts participate in the county ESC's career-navigation program. [Tribune](#)

- **Ohio weekly jobless claims** — continued claims 41,073 for the week ending June 6 (up 1,483); initial claims also rose.

HOUSING

- **Mercer County (PA): \$425K in PHARE awards (June 12).** Youngstown Neighborhood Development Corp. receives \$200,000 to build four family homes in the City of Sharon (PA); CAP of Mercer County \$100,000 and \$75,000; Shenango Valley Urban League \$50,000. Announced by Rep. Parke Wentling. [BJD](#)

EMPLOYER WATCH

- **Mercer County (PA) employer base** — a new profile shows a labor force of 46,600 (44,500 employed); commonwealth government among the top employers (1,000+ workers across 23 establishments); major private employers include Wabtec, Joy Cone, NLMK Pennsylvania, John Maneely and UPMC Horizon. [WFMJ](#)

RETAIL & RESTAURANT BEAT

- **Oakmont Plaza (Columbiana) sells for \$2.2M.** The 18,890-SF retail plaza at 901–921 Columbiana-Canfield Road — 11 tenants including Domino's, H&R Block and AT&T — sold from Oakmont Plaza LLC to 3rd Realm Holdings LLC on June 8. [BJD](#)

- **Cortland Roller Rink (Trumbull)** sold for \$700,000 to a Nevada company (290 S. High St.). [BJD](#)

ECONOMIC INDICATORS

Indicator	Current	Prior	Source
Trumbull unemployment	4.7% (Apr)	5.6% (Mar)	ODJFS
Mahoning unemployment	4.4% (Apr)	5.3% (Mar)	ODJFS
Columbiana unemployment	3.4% (Apr)	4.4% (Mar)	ODJFS
Ohio unemployment (SA)	3.9% (Apr)	4.1% (Mar)	ODJFS
U.S. unemployment	4.3% (May)	4.3% (Apr)	BLS
PA statewide unemployment	4.2% (Apr)	4.2% (Mar)	BLS
CPI (headline)	+0.5% MoM / +4.2% YoY (May)	—	BLS
PPI (final demand)	+1.1% MoM / +6.5% YoY (May)	—	BLS
Initial jobless claims	229,000 (wk 6/6)	—	BLS/DOL
Consumer sentiment (UMich)	48.9 (Jun prelim)	44.8 (May)	U. Michigan
Ohio continued claims	41,073 (wk 6/6)	—	ODJFS
Columbiana oil (Q1 2026)	543,905 bbl	307,985 (Q4)	ODNR
Fed Beige Book (4th Dist.)	Up slightly (May)	—	FRB Cleveland

Ashtabula County and Mercer & Lawrence (PA) April figures not cleanly released — prior figures carried pending verification. Next ODJFS county release June 18. Sources: [BLS CPI](#) · [BLS PPI](#) · [ODJFS](#) · [ODNR](#).

National context (WSJ consensus vs. actual): May CPI (+0.5% MoM / +4.2% YoY) and PPI (+1.1% / +6.5%) both ran warm; initial jobless claims (229K, wk 6/6) came in above the roughly 219K consensus; and June consumer sentiment (UMich prelim 48.9) beat the ~46.0 forecast, rebounding from May's record-low 44.8.

CAPITAL PIPELINE

Cumulative reference table, carried forward from Issue #14. * = updated this issue; NEW = added this issue.

Project	Invest.	Jobs	Status	County
SoftBank/Stargate — Lordstown	\$3B+	TBD	Site work continues; online '26-'27	Trumbull
* Ultium Cells — Lordstown	\$2.3B	~1,500 pk	Aug callback target; ~850 temp layoff; ~650 active	Trumbull
Graphite One — Conneaut	\$1.4B	Ph1 150+	Q4 2027 target; FAST-41 Sept 29; AGM June 26	Ashtabula
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; at Mercer Co. RPC; Oct '26	Mercer PA
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	Niles 6-mo moratorium in effect (see roster)	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; Columbiana Q1 record	Regional
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 design; demo bid; const. 2027	Mahoning
S.E.T. Sewer Interceptor Ph. 1	\$5.44M	—	Final cost approved; overflow eliminated	Mahoning
Ashore/Concept-4 — Berlin Ctr	TBD	TBD	Precision machining; AS9100 path; defense	Mahoning
Brownfield — YMCA Ytown	\$1M	—	Transitional housing + youth dev; 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	—	Council approved; const. mid-2027	Mahoning
YNG Aviation Ed Center	\$6.98M	—	Contract approved; EDA/FAA notice pending	Trumbull
East Liverpool Route 39	~\$40M	—	\$29.7M federal; \$7M local match; 2028	Columbiana
Castlo Industrial Park Road	\$537K	60	\$350K ODOT grant; Lindy Paving support	Mahoning
Pier 48 Equipment — Wellsville	\$573K	—	\$441K MARAD + \$133K ODOT grants	Columbiana
Niles Riverside Park	\$3.5M	—	Opened May 28, 2026	Trumbull
* SOBE Thermal — Dtown YTown	TBD	—	Receiver Collins; ~\$4M owed; Sept/Oct cliff; Council 2nd reading June 17	Mahoning
Trumbull Land Bank Housing	\$1M	10 homes	Welcome Home Rd 5; 5 purchase + 5 new	Trumbull
* Bristolville 25 — Lordstown	\$3.6B	120	OH Supreme Court mandamus; June 15 extension hearing	Trumbull
Zuharis / Project Astralus	TBD	2,000-5,000	510 ac DC + power plant + water; Q3 2027	Columbiana
* SB 450 — Valley line items	\$16M+	—	House passed June 10; to DeWine	Multi
Amazon Bazetta DC	\$30M	~120	169K SF; under construction; awaiting opening date	Trumbull
NEW Niles ARC POWER Grant	\$402,500	~30	Awarded; west-side electrical capacity / BRT	Trumbull

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

Amazon Bazetta DC is a tracker-only line and does not appear in editorial, signals, On Deck, or teasers. Bazetta Township's data-center moratorium (see roster) is a distinct governance item.

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