

MAHONING VALLEY MARKET PULSE™

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FROM THE EDITOR

The Mahoning Valley entered the second half of 2026 with major projects under construction. Kimberly-Clark's \$800 million manufacturing complex, Mercy Health's new Champion facility, Trumbull Career and Technical Center's expansion and Shepherd of the Valley's Salem development are contributing to a building season in which regional construction man-hours were reported roughly 15% above the comparable period last year.

The broader signal is not simply that several large projects happen to be underway at the same time. Manufacturing, health care, workforce training, senior housing, industrial-site planning and riverfront infrastructure are drawing investment across the region.

Momentum is being tested by questions about infrastructure capacity, development transparency and workforce supply. Hubbard's data-center debate is now focused on power infrastructure and public disclosure, while regional employers and workforce organizations are working to convert interns, students and trade-program participants into long-term Valley workers.

All items sourced July 6-12 unless otherwise dated. Capital Pipeline Tracker and Economic Indicators are cumulative reference tables updated weekly.

ON DECK - JULY 13-20

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|---------------------------|--|
| Monday, July 13 | New Beaver Borough Council: Council is scheduled to consider Ordinance No. 2 of 2026 establishing definitions and regulations for data centers and accessory uses. Agenda |
| Monday, July 13 | Girard City Council: Final action may occur on the proposed one-year data-center moratorium. Background |
| Wednesday, July 15 | Western Reserve Port Authority: Board meeting at 8:30 a.m. at Youngstown-Warren Regional Airport. Meeting information |
| Thursday, July 16 | Hubbard petition review: The Trumbull County Board of Elections is expected to review petitions seeking a permanent local ban on data centers. WFMJ report |

Mark Your Calendar: America Makes Members Meeting and Exchange, Aug. 4-5 at Waypoint 4180 in Canfield ([event information](#)); Mahoning Valley Skilled Trades Expo, Sept. 22-24 at the Canfield Fairgrounds ([venue information](#)).

Major Projects Drive a Broader Valley Construction Cycle

Major industrial, medical, education and residential projects are moving through construction across the Mahoning Valley, giving the region one of its most active building seasons in recent years.

The largest is Kimberly-Clark's \$800 million manufacturing complex on 560 acres spanning Warren, Warren Township and Howland Township. More than 350 people were reported working at the site during construction, with 491 permanent jobs associated with the project when operations begin. The planned facility will encompass approximately 1.2 million square feet. Kimberly-Clark helped Ohio secure a 2026 Silver Shovel Award from *Area Development*.

Other projects reinforce the breadth of the cycle. Mercy Health is building a \$50 million Champion facility that includes a 30,000-square-foot emergency, imaging and laboratory center. Trumbull Career and Technical Center is completing a \$6.4 million expansion for industrial training, career exploration and student mental-health services. Shepherd of the Valley's \$62 million Salem development will add independent-living villas, apartments and assisted-living suites.

Kevin Reilly of the Builders Association of Eastern Ohio and Western Pennsylvania told Business Journal Daily that construction man-hours measured from October through March were approximately 15% above the same period a year earlier. The impact extends beyond the individual projects: more work for contractors and skilled trades, added demand across the regional supply chain and a stronger base of operating assets as projects are completed.

Sources: [Business Journal Daily construction roundup](#) · [JobsOhio Kimberly-Clark profile](#) · [Tribune Chronicle Mercy Health report](#) · [Regional Chamber Silver Shovel report](#)

STRATEGIC SIGNALS

East Palestine advances industrial development as settlement activity continues

East Palestine's post-derailment economic recovery took another step forward as the village secured \$2.4 million in federal funding for engineering and design work on a planned industrial park along Route 14. The award is intended to prepare multiple light-industrial spaces, although no job estimate has been established. Property-claim settlement checks also began reaching class-action participants - independently confirmed by Market Pulse as early as July 6 - while separate business lawsuits against Norfolk Southern reached settlements whose amounts were not disclosed.

Sources: [U.S. Economic Development Administration](#) · [WKBN settlement-payment report](#) · [WFMJ business-settlement report](#)

Riverfront work connects Niles investment to the larger Mahoning River strategy

Riverfront investment continues to spread along the Mahoning River corridor, with Niles opening its new public square and Riverside Park as another visible milestone in the region's long-term waterfront redevelopment strategy. The \$3.5 million project includes a canoe and kayak launch, amphitheater, nature playground and riverfront pathways. The city is also preparing another \$4.5 million in signalization, lighting, crosswalk and streetscape work, while Eastgate reports additional dam removals are expected this year or early next year.

Source: [Tribune Chronicle](#)

Hubbard debate shifts toward infrastructure transparency

Newly released emails show Crane Data Centers communicated repeatedly with Hubbard officials while the city considered legislation authorizing the potential sale of municipal transmission infrastructure to

American Municipal Power. City officials maintain the legislation was already underway to strengthen Hubbard's electric system and was not driven by the proposed data-center project. The infrastructure sale has been authorized but not completed, while the city continues to debate future data-center development.

The report follows Hubbard City Council's creation of a data-center committee and a citizen petition drive seeking a permanent local ban on data centers.

Sources: [WFMJ Watchdog report](#) · [WFMJ committee and petition report](#)

INFRASTRUCTURE & COMMUNITY DEVELOPMENT

Mahoning County expands online property-record access

The Mahoning County Recorder's Office has made document images available remotely through Laredo Anywhere, expanding access for property owners, title professionals, attorneys, lenders and development teams conducting real-estate research and due diligence. The county describes the service as free and covering recorded documents from 1980 to the present. [Recorder's Office information](#)

POWER, DATA & SITE READINESS

New Beaver prepares data-center regulations

New Beaver Borough Council is scheduled to consider an ordinance July 13 establishing definitions and development regulations for data centers and accessory uses. Because the meeting occurs after publication, Issue #19 reports only that the ordinance is pending; the outcome will be carried into the following issue. [Public notices](#)

For a closer look at the power, zoning and economic considerations influencing data-center projects in the Mahoning Valley, download Cornerstone's [Data Center Dilemma white paper](#).

EMPLOYER WATCH

Schwebel reports a potential buyer

Schwebel Baking Co. has identified a potential buyer as the 120-year-old Youngstown company considers an expedited Chapter 11 process to facilitate a sale. A federal court filing indicates the parties are discussing whether a purchase is feasible, but no transaction has been completed; the signal is therefore potential operating continuity rather than a confirmed rescue. [WKYC report](#)

ECONOMIC DEVELOPMENT

Ohio ranking strengthens the backdrop for Valley investment

CNBC ranked Ohio first in its 2026 America's Top States for Business assessment, citing the state's performance in infrastructure and cost of doing business. The ranking provides a favorable recruitment backdrop, but the Valley's more meaningful measures remain project execution, hiring, infrastructure delivery and whether announced investments translate into sustained operating activity. [Read CNBC's ranking](#)

WORKFORCE & EDUCATION

Trades outreach is attracting younger applicants

Regional construction unions and education partners report increasing interest from students entering the building trades directly from high school. The Mahoning Valley Skilled Trades Expo, scheduled for Sept. 22-24 at the Canfield Fairgrounds, draws approximately 6,000 students annually, while the Builders Association is extending exposure to younger students through a JA BizTown storefront at the planned JA Discovery Center at Eastwood Mall. [Worker-pipeline report](#)

College Intern Day targets long-term retention

The Youngstown/Warren Regional Chamber hosted its second annual College Intern Day on July 9, giving student interns opportunities to meet employers and consider regional career, housing and quality-of-life options. The effort is intended to turn temporary internship exposure into longer-term employment and residency decisions. [WKBN report](#)

Population movement offers a cautiously positive signal

JobsOhio says Census estimates show Ohio has added more than 100,000 residents since 2020 and has also gained prime working-age residents. Closer to home, a Mahoning Valley housing symposium earlier this year reported a slight regional population uptick. Taken together, the figures suggest the population narrative may be improving. [JobsOhio population release](#)

LEGISLATIVE & POLICY WATCH

Data-center framework remains a priority watch

[HB 646](#) would create a Data Center Study Commission and address state incentives, electric service, water use and other regulatory considerations. The bill has direct relevance to Valley communities weighing moratoriums, zoning controls, infrastructure requirements and the appropriate division of responsibility between state and local government.

Defense and aerospace coordination could benefit Ohio suppliers

[HB 292](#) would establish an Ohio Defense and Space Commission intended to strengthen collaboration among government, universities, research organizations and defense-industry participants, with potential implications for Mahoning Valley manufacturers and additive-manufacturing organizations competing for defense and aerospace work.

Also monitored: [SB 462](#), addressing employer and higher-education partnerships, and [SB 428](#), addressing four-family dwellings and certain single-stairway building provisions.

RETAIL & RESTAURANT BEAT

Southern Park Mall resumes normal operations

Southern Park Mall reopened July 8 after closing for safety inspections and property assessments following weekend flooding, restoring normal operations at Boardman's principal retail center. [WFMJ report](#)

DATA-CENTER GOVERNANCE TRACKER

Cumulative roster of local and state actions affecting data-center development. New Beaver Borough is added this week; Hubbard City and the Lawrence County Planning Commission carry verified updates.

Jurisdiction	County	Term / Status	Date / Update
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Lordstown Village	Trumbull OH	180 days + extension	Original moratorium approved January; extension approved June 15, effective July 5
Hubbard City	Trumbull OH	12 months	Approved June 1; council committee formed July 6; 750+ petition signatures submitted for July 16 Board of Elections review; July 10 reporting raised power-infrastructure disclosure questions
Hubbard Township	Trumbull OH	12 months	Approved Feb. 10
Boardman Township	Mahoning OH	1 year	Approved at April township meeting; zoning commission studying impacts
Niles City	Trumbull OH	180 days	Approved May 20
Weathersfield Township	Trumbull OH	6 months	Effective April 30
Vienna Township	Trumbull OH	180 days	Approved week of Feb. 16; reported Feb. 21
Bazetta Township	Trumbull OH	180 days	Approved May 12
Braceville Township	Trumbull OH	6 months	Approved June 2, effective immediately
Cortland City	Trumbull OH	1 year	Approved June 1
Howland Township	Trumbull OH	6 months	Approved June 10
Warren City	Trumbull OH	Permanent ban proposed	In process / watch
Girard City	Trumbull OH	1-year moratorium proposed	Second reading June 2026; final reading expected July 13
Mahoning Township	Lawrence PA	Zoning ordinance + active review	Enacted local controls; preliminary 16-building S.S. Penn / Powder Mill Works plan; supervisors July 14
North Beaver Township	Lawrence PA	Zoning ordinance + active review	Enacted local controls; preliminary 16-building S.S. Penn / Powder Mill Works plan; supervisors July 13
New Beaver Borough	Lawrence PA	Data-center zoning ordinance pending	Ordinance No. 2 of 2026 scheduled for consideration July 13 at 7 p.m.; outcome follows Issue #19 publication
Lawrence County Planning Commission	Lawrence PA	Review body	July 8 meeting cancelled; North Beaver/Mahoning preliminary plan remains pending for a future review
Hermitage City	Mercer PA	Restrictions approved	Commissioners approved data-center restrictions; details to monitor
Pennsylvania statewide	PA	Legislation / moratorium option	HB 2359 passed House 171-31; Senate committee advanced 18-month municipal moratorium option
Ohio statewide ballot issue	Ohio	Ballot proposal	2026 signature threshold missed; 2027 effort possible

Issue #19 updates: Hubbard City committee/petition/infrastructure-disclosure developments; New Beaver Borough ordinance pending July 13; Lawrence County Planning Commission July 8 meeting cancellation.

ECONOMIC INDICATORS

Latest available values at the Issue #19 production cutoff. County unemployment figures use BLS Local Area Unemployment Statistics, not seasonally adjusted.

Indicator	Latest	Prior	Change	Signal
Mahoning County unemployment	3.8% May	4.4% Apr.	down 0.6 pts.	Improving
Trumbull County unemployment	4.1% May	4.6% Apr.	down 0.5 pts.	Improving

Columbiana County unemployment	3.1% May	3.4% Apr.	down 0.3 pts.	Improving
Ashtabula County unemployment	3.2% May	3.0% Apr.	up 0.2 pts.	Slight monthly uptick; below year-ago level
Lawrence County unemployment	4.0% May	3.9% Apr.	up 0.1 pts.	Slight monthly uptick
Mercer County unemployment	4.2% May	3.9% Apr.	up 0.3 pts.	Monthly increase; near year-ago level
Ohio unemployment	3.7% May	3.9% Apr.	down 0.2 pts.	Stable-to-improving
Pennsylvania unemployment	4.2% May	4.2% Apr.	Flat	Stable
U.S. unemployment	4.2% June	4.3% May	down 0.1 pts.	Softer payroll growth, lower jobless rate
Valley home sales	475 May sales	484 May 2025	down 2%	Slightly softer
30-year fixed mortgage rate	6.49% July 9	6.43% July 2	up 0.06 pts.	Prior week's easing reversed; affordability constraint remains

Updated this issue: Ashtabula, Lawrence and Mercer county unemployment; 30-year fixed mortgage rate. Sources: [BLS/FRED Ashtabula](#) · [BLS/FRED Lawrence](#) · [BLS/FRED Mercer](#) · [Freddie Mac PMMS](#)

CAPITAL PIPELINE TRACKER

Cumulative six-county project tracker. Existing rows carry forward unless a verified update supersedes them.

Project	Invest.	Jobs	Status	County
SoftBank/Stargate - Lordstown	\$3B+	TBD	Site work continues; online 2026-27	Trumbull
Ultium Cells - Lordstown	\$2.3B	~1,500 pk	August callback target; income-tax impact now visible	Trumbull
Graphite One - Conneaut	\$1.4B Ph1	150+	FAST-41 Sept. 29; AGM June 26	Ashtabula
Kimberly-Clark - Warren Mfg	\$800M	~500	Construction active; 1.2M SF on 560 acres	Trumbull
K-C Distribution Center	\$160M	65	Board decision pending	Trumbull
Keel Data Center - Sharon	\$5B	134	Zoning approved with conditions; Mercer Co. RPC review	Mercer PA
FirstEnergy Grid - Trumbull	\$24M	-	138-kV rebuild; Energize365 reliability work	Trumbull
Warren Steel Site	\$15M loan	-	Foreclosure; 360-acre industrial site	Trumbull
Everest Aluminum - Warren	\$19.5-33M	70	Tax abatement approved; site decision pending	Trumbull
Innovation Hub - A&D	\$62M	450 by 2029	State \$750K allocation supports first-phase renovations; summer 2026 start target	Mahoning
Mercy Health - Champion ER*	\$50M project; \$843K bridge	75 prior estimate	Construction active; 30,000 SF emergency, imaging and laboratory facility; bridge award supports access	Trumbull
Vallourec - Premium Thread	\$48M	40	Commissioning Q1 2027	Mahoning
EOG/Encino - Utica Drilling	\$6.5B	1,000s	Regional upstream priority	Regional
McDonald Steel Site	\$3.25M	-	51.8 acres cleared; sale window Jul-Oct 2026	Trumbull
Youngstown REDD Infill	\$2.5M	220 units	Awarded March 6	Mahoning
Warren Peninsula Project	\$851K	306 units	Awarded March 6	Trumbull
Mahoning National Bank Bldg	\$18.5M	71 units	Renovation active	Mahoning
Mahoning Co. Gov't Center	\$60M	400+	WRPA design / demolition path; construction 2027	Mahoning

Bristolville 25 / Lordstown	\$3.6B	120 projected	Lordstown moratorium extended 180 days effective July 5	Trumbull
Zuharis / Project Astralus	TBD	2,000-5,000	510-acre DC + power plant + water; Q3 2027 target	Columbiana
AMG Chrome - New Castle	\$15M	TBD	Opened; sole U.S. chrome-metal producer; 6,500-ton capacity	Lawrence PA
YNG Aviation Education Center	\$6.98M	-	Contract awarded; awaiting EDA / FAA notice to proceed	Trumbull
Youngstown river / sewer infrastructure	\$10.35M sewer + dam work	-	Exal Court pump-station bids below estimate; sewer overflow / dam-access work continues	Mahoning
East Palestine Train Depot	\$889,545 contract	TBD	Renovation contract awarded; work expected early July	Columbiana
SB 450 Valley line items	Mult	-	Capital budget signed; local line items enacted	Mult
Amazon Bazetta DC	\$30M	~120	Under construction; opening date pending	Trumbull
Trumbull Energy Center	\$1.2B	-	953-MW Lordstown power plant completed / commercial operation	Trumbull
WRTA Bus Barn	\$6.5M	-	Groundbreaking; EV charging, electrical upgrades and solar	Mahoning
Central Tower - Youngstown	\$21.66M	64 units	\$2M TMUD tax credit awarded after \$4.25M historic credit; summer start / Feb. 28, 2028 target	Mahoning
YNDC Glenwood Cleanup	\$1M	-	EPA Brownfields grant supports assessment and cleanup	Mahoning
Columbiana Stormwater	\$664,596	-	June 18 FEMA award for storm-sewer upgrades	Columbiana
East Palestine Route 14 Industrial Park NEW	\$2.4M EDA award	TBD	Federal award supports engineering and design for a new manufacturing-oriented industrial park	Columbiana

Legend: * Existing tracker row materially updated this issue. **NEW** = row added this issue. Shading: green = construction; yellow = planning; blue = awarded/funded; purple = renovation; red = paused/distressed.

Issue #19 changes: Mercy Health - Champion ER updated to active construction and marked with an asterisk; East Palestine Route 14 Industrial Park added as NEW. All other rows carry forward from Issue #18 without a current-week marker.

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