

MAHONING VALLEY MARKET PULSE™

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FROM THE EDITOR

From Plans to Execution

Several of last week's strongest signals came from projects moving closer to execution. Hermitage advanced plans for a Meijer supercenter at Hickory Fields; Iten Defense broke ground on a 50,000-square-foot expansion in Saybrook; Southwoods Health completed a 40,000-square-foot expansion and renovation of its Surgical Hospital; and financing is in place for Youngstown's 120-unit Homestead Crossing development.

Mahoning County registered another kind of development signal: 496 new oil and gas leases have been filed since April 17, compared with 82 during all of 2025.

All items sourced Aug. 3-9 unless otherwise dated. The Capital Pipeline Tracker, Economic Indicators and Data-Center Moratorium, Restrictions & Governance Tracker are cumulative reference sections updated weekly.

ON DECK

Date	Item
Monday, August 10	Conneaut City Council is scheduled for the third reading of its proposed data center moratorium.
Wednesday, August 12	Proposals are due to Eastgate for its Mahoning-Trumbull housing development suitability analysis.
Wednesday, August 12	Lawrence County Planning Commission meets at noon in Plain Grove Township. No August agenda had been posted through Aug. 9.

Sources: [Gazette News](#); [Eastgate Council of Governments](#); [Lawrence County](#).

MARK YOUR CALENDAR

Date	Item
September 3	Regional Chamber hosts Salute to Business.
September 10	BRITE hosts its Grid to Growth Energy Innovation Summit.

Sources: [Youngstown/Warren Regional Chamber](#); [BRITE](#).

Meijer Plan Advances at Hickory Fields

Hermitage's Planning Commission recommended approval Aug. 3 of development plans for a 159,240-square-foot Meijer supercenter at Hickory Fields, the former Shenango Valley Mall property. The commission also recommended plans associated with an M Express fuel and convenience operation and a replacement Wendy's restaurant.

The action adds another potential major anchor to a redevelopment where Target is already under construction. It also moves Hickory Fields beyond the earlier mix of restaurant and retail announcements into another large-format project.

The Meijer plans still require action by the Hermitage Board of Commissioners, which is scheduled to consider the site plans Aug. 26, and subsequent construction-document and permitting review.

Sources: [City of Hermitage meeting schedule](#); [Business Journal Daily](#).

STRATEGIC SIGNALS

Mahoning Oil and Gas Leasing Surges

Mahoning County Recorder records cited in current reporting show 496 new oil and gas leases filed since April 17, along with 12 lease assignments. That compares with 82 leases during all of 2025 and one during 2024. Frio Resources and Del Rio III are among the companies assembling acreage.

The activity is a significant signal that attention is returning to the northern portion of the Utica/Point Pleasant formation. It remains an early-stage indicator: a lease establishes rights and development interest but does not mean the acreage will be drilled or producing on a defined schedule.

Sources: [Mahoning County Recorder](#); [Business Journal Daily](#).

Iten Defense Breaks Ground on Saybrook Expansion

Iten Defense broke ground Aug. 5 on a 50,000-square-foot expansion of its Saybrook Township manufacturing operation. Growth Partnership for Ashtabula County officials said the composite-armor manufacturer plans to install equipment for additional product lines and that the expansion is expected to support added employment and international growth. A specific investment amount and job count have not been publicly verified.

The same Growth Partnership meeting provided broader context. Lake to River Economic Development CEO Dani Robbins reported nearly \$4 billion in pending projects across 41 prospects with \$151 million in potential payroll in the four-county Lake to River territory. Those are pipeline figures, not committed investments. Growth Partnership officials also said Graphite One continues due diligence on its Conneaut site; that does not change Market Pulse's existing Graphite One tracker status.

Sources: [Iten Defense](#); [Business Journal Daily](#).

HEALTHCARE

Southwoods Completes 40,000-SF Surgical Hospital Expansion

Southwoods Health announced Aug. 4 that it completed a multimillion-dollar, 40,000-square-foot expansion and renovation at The Surgical Hospital at Southwoods in Boardman. The project includes a new endoscopy unit, renovated pre- and post-operative areas, larger patient bays and an expanded waiting room.

Southwoods said the project is intended to meet growing demand while improving privacy, efficiency and the patient experience.

Source: [Southwoods Health](#).

Homestead Crossing Moves Toward 120 New Youngstown Apartments

Wallick Development's Homestead Crossing project at 800 E. Indianola Ave. is moving toward construction with financing approvals that include a \$2.5 million Housing Development Loan, \$10 million in Ohio low-income housing tax credits and 4% federal LIHTCs. OHFA subsequently authorized up to \$21.5 million in Multifamily Housing Revenue Bonds. The development would add 120 apartments in five buildings.

OHFA application materials put the proposed total development cost at approximately \$34.4 million.

Sources: [OHFA May financing](#); [OHFA July bonds](#); [OHFA application](#).

POWER, DATA & SITE READINESS

North Beaver Hearing Leaves Powder Mill Zoning Question Open

North Beaver Township's Zoning Hearing Board held an Aug. 4 hearing over Stonebridge Associates' application for a proposed data center campus at Powder Mill Works. The dispute centers on whether the application was complete before newer township zoning provisions took effect. Township officials said Stonebridge paid the township and county filing fees but failed to include a required \$3,000 Lawrence County escrow payment; Stonebridge disputed whether that requirement had been adequately communicated.

The zoning board made no decision at the hearing and indicated a ruling would come within 45 days. Stonebridge's attorney said application of zoning provisions adopted in June rather than those in place when the plans were prepared could affect whether the project proceeds.

Source: [WKBN](#).

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](#).

LEGISLATIVE & POLICY WATCH

Ohio Supreme Court Ruling Adds to Data Center Referendum Questions

The Ohio Supreme Court ordered Ashville's fiscal officer to transmit a referendum petition challenging the village's EdgeConneX data center resolution to the Pickaway County Board of Elections. The Court found the resolution's emergency declaration insufficient to prevent certification.

The ruling is narrow. The Court did not decide whether the underlying Ashville action is legislative or administrative and therefore did not determine whether it ultimately is subject to referendum. That question remains for the local election process.

Why it matters here: Hubbard City offers a local parallel, although the legal circumstances are not identical. City Council adopted its 12-month data center moratorium June 1 as emergency legislation while residents separately pursued a citizen initiative seeking a data center ban. Trumbull County elections officials later certified 612 valid petition signatures, above the 370 required locally. The Ashville ruling does not decide Hubbard's initiative or affect Hubbard's moratorium, but it underscores why the form and stated basis of emergency legislation can matter when residents are simultaneously invoking petition rights.

Sources: [Supreme Court of Ohio](#); [Vindicator](#).

Bill	Current treatment	Status / significance
HB 646	Data center framework	House-passed measure remains in the Senate and has been recommitted to the Senate Energy Committee. It creates a Data Center Study Commission and addresses multiple infrastructure, utility, water and incentive issues.
HB 292	Defense & aerospace	Signed July 7. Creates the Ohio Defense and Space Advisory Commission and Defense and Aerospace Industries Expansion Program. Appropriations took effect July 7; remaining provisions take effect Oct. 6.

Bill	Current treatment	Status / significance
HB 361	Development review	Remains in House Local Government Committee and has not been reported; addresses building inspections, local regulations and zoning procedures.
HB 756	R&D tax credit	Remains in House Ways and Means and has not been reported; would expand Ohio's research-and-development tax credit to the income tax.
HB 844	Technology investment credit	Remains in House Ways and Means and has not been reported; would authorize an income-tax credit for qualifying technology investments.

Also monitoring: [HB 983](#), [HB 613](#), [HB 921](#), [SB 462](#), [SB 428](#), [SB 250](#).

RETAIL & RESTAURANT BEAT

Eastwood Mall Ranks No. 7 Nationally for Retail Center Experience

Chain Store Age ranked Eastwood Mall No. 7 nationally on its 2026 Top 10 Retail Center Experiences list, highlighting the Niles complex's mix of more than 200 retailers, restaurants and entertainment venues and 717 Credit Union Field, home of the Mahoning Valley Scrappers.

The publication also highlighted the broader Eastwood complex's approximately 3 million square feet of retail across the mall and six power centers, along with more than 20 brands added during the past five years. Recent additions cited include Meijer, HomeGoods, Dave & Buster's, Macy's Backstage and Sierra, while Regal Cinemas Eastwood recently completed an extensive renovation.

Source: [Chain Store Age](#).

Layne's Chicken Fingers Prepares Boardman Location

Layne's Chicken Fingers lists a new restaurant at 940 Boardman Poland Road as coming soon and has been recruiting an opening team. The Texas-based chain will enter one of the region's most concentrated restaurant corridors. An exact opening date has not been announced.

Source: [Layne's Chicken Fingers](#).

ECONOMIC INDICATORS

Indicator	Latest	Prior	Change	Signal
Mahoning County unemployment	4.6% June	3.8% May	up 0.8 pts.	Monthly increase
Trumbull County unemployment	5.0% June	4.1% May	up 0.9 pts.	Monthly increase
Columbiana County unemployment	4.0% June	3.1% May	up 0.9 pts.	Monthly increase
Ashtabula County unemployment	3.6% June	3.2% May	up 0.4 pts.	Monthly increase
Lawrence County unemployment	3.9% June	4.0% May	down 0.1 pts.	Slight improvement
Mercer County unemployment	4.3% June	4.2% May	up 0.1 pts.	Slight monthly increase
Ohio unemployment	3.6% June	3.7% May	down 0.1 pts.	Statewide rate improved
Pennsylvania unemployment	4.1% June	4.2% May	down 0.1 pts.	Below U.S. rate
U.S. unemployment	4.1% July	4.2% June	down 0.1 pts.	Payrolls fell 23,000
Ohio initial unemployment claims	4,331 w/e Aug. 1	5,061 prior week	down 730	Weekly claims eased
Valley home sales	514 June	483 June 2025	up 6%	Year-over-year gain
30-year fixed mortgage rate	6.69% Aug. 6	6.66% July 30	up 0.03 pts.	Affordability constraint remains

Sources: [Ohio LMI](#); [Pennsylvania Department of Labor & Industry](#); [U.S. Bureau of Labor Statistics](#); [U.S. Department of Labor weekly claims](#); [Valley home sales](#); [Freddie Mac](#).

DATA-CENTER MORATORIUM, RESTRICTIONS & GOVERNANCE TRACKER

This tracker covers municipal moratoriums, restrictions, zoning actions and government reviews affecting data-center development. It does not indicate that a data-center project has been approved unless specifically stated.

Jurisdiction	Action Being Tracked	Current Status	Effective Date / Next Trigger
Lordstown Village (Trumbull OH)	Moratorium and extension	MORATORIUM EXTENDED	Original moratorium adopted in January 2026; extension approved June 15, effective July 5; scheduled to expire Jan. 1, 2027, unless further extended or replaced.
Hubbard City (Trumbull OH)	Moratorium / local policy review	MORATORIUM IN EFFECT	Effective June 1, 2026; scheduled to expire June 1, 2027. Council committee formed July 6; petition and power-infrastructure issues remain under review.
Hubbard Township (Trumbull OH)	Moratorium / disclosed developer interest	MORATORIUM IN EFFECT - DEVELOPER INTEREST DISCLOSED	Effective Feb. 10, 2026; scheduled to expire Feb. 10, 2027. Trustees disclosed preliminary interest in a separate 75-acre site during the week of July 13; no application or approval.
Boardman Township (Mahoning OH)	Moratorium / zoning study	MORATORIUM IN EFFECT	One-year moratorium adopted April 28, 2026; scheduled to expire April 28, 2027. Zoning commission continues studying impacts.
Niles City (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective May 20, 2026 for 180 days; scheduled to expire Nov. 16, 2026, unless extended or replaced.
Weathersfield Township (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective April 30, 2026 for six months; scheduled to expire Oct. 30, 2026, unless extended or replaced.
Vienna Township (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Adopted in February 2026 for 180 days; the exact effective and scheduled expiration dates remain to be confirmed.
Bazetta Township (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective May 12, 2026 for 180 days; scheduled to expire Nov. 8, 2026, unless extended or replaced.
Braceville Township (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective June 2, 2026 for six months; scheduled to expire Dec. 2, 2026, unless extended or replaced.
Cortland City (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective June 1, 2026 for one year; scheduled to expire June 1, 2027, unless extended or replaced.
Howland Township (Trumbull OH)	Moratorium	MORATORIUM IN EFFECT	Effective June 10, 2026 for six months; scheduled to expire Dec. 10, 2026, unless extended or replaced.
Warren City (Trumbull OH)	Permanent-ban proposal / governance study	BAN UNDER CONSIDERATION - TABLED / GOVERNANCE REVIEW PLANNED	Council tabled the proposed ban at third reading July 22, 2026; a review committee was proposed, with the next action expected after the August 2026 recess.
Girard City (Trumbull OH)	Moratorium	MORATORIUM ADOPTED	Effective July 13, 2026 for 12 months; scheduled to expire July 13, 2027, unless extended or replaced.
McDonald Village (Trumbull OH)	Local guidelines	PLANNING UNDERWAY - GUIDELINES IN DEVELOPMENT	Guidelines remain under development; the next trigger is formal local action.
Mahoning Township (Lawrence PA)	Zoning controls / litigation	ZONING / LITIGATION UNDERWAY	Local controls and the Powder Mill Works review remain subject to litigation and local review; the next trigger is court or local action. No project approval is implied.
* North Beaver Township (Lawrence PA)	Zoning controls / litigation	ZONING / LITIGATION UNDERWAY	Aug. 4 appeal hearing held regarding application completeness and applicable zoning rules. No decision issued at hearing; board indicated a ruling within 45 days. No project approval is implied.
New Beaver Borough (Lawrence PA)	Zoning ordinance review	ZONING REVIEW UNDERWAY	Ordinance No. 2 of 2026 remains the local-review item; the next trigger is formal borough action.
Lawrence County Planning Commission (Lawrence PA)	Preliminary-plan review	PROJECT REVIEW PENDING	The North Beaver/Mahoning preliminary plan remains pending; the next regular Planning Commission meeting is Aug. 12.
Hermitage City (Mercer PA)	Zoning restrictions / conditional-use standards	RESTRICTIONS ENACTED	Board of Commissioners enacted the data-center zoning ordinance July 22, 2026; effective July 29. Data centers are conditional uses in LI/HI districts with setback, noise, utility, environmental, emergency-management and decommissioning standards.
Sharon City (Mercer PA)	Zoning standards	ZONING STANDARDS ADOPTED	City Council approved data-center zoning amendments during the week of July 13, 2026; the action sets standards and is not a new project approval.
Pennsylvania statewide (PA)	Municipal moratorium legislation	MUNICIPAL MORATORIUM OPTION UNDER CONSIDERATION	HB 2496 would allow municipalities to pause consideration of data-center applications for up to 180 days; the measure remains pending in the Senate.
Ohio statewide ballot issue (Ohio)	Statewide ballot proposal	2026 BALLOT DEADLINE MISSED	The signature threshold was not met for the 2026 ballot; a 2027 effort remains possible.
Youngstown City (Mahoning OH)	Preliminary recruitment / municipal governance review	GOVERNANCE REVIEW / PRELIMINARY DISCUSSIONS - NO FORMAL APPLICATION	Public records reviewed in July 2026 document site and utility discussions; the city reports no application, agreement, permit or site approval.
Conneaut City (Ashtabula OH)	Governance review / proposed moratorium	COMMITTEE FORMED - MORATORIUM PROPOSED	Nine-member review committee formed; no data-center proposal submitted. Proposed moratorium has not been adopted. Third reading scheduled Aug. 10, 2026.

Legend: * existing governance row materially updated this issue; NEW jurisdiction added this issue. Governance actions remain separate from project approvals and from the Capital Pipeline.

CAPITAL PIPELINE TRACKER

Cumulative six-county project tracker. Existing rows carry forward unless a verified update supersedes them. NEW marks a project added this issue.

Project	Investment	Jobs / Units	Status	County
SoftBank/Stargate - Lordstown	\$3B+	TBD	Site work continues; online 2026-27	Trumbull
Ultium Cells - Lordstown	\$2.3B	~1,500 pk	Phased callback began July 27; exact number returning has not been disclosed; return period expected through approximately week of Aug. 17; some workers remain on indefinite layoff.	Trumbull
Graphite One - Conneaut	\$1.4B	Ph1 150+	Ohio EPA air-permit application administratively complete; technical review underway; no permit approval.	Ashtabula
CCL Container - Hermitage	\$16.3M	30 new / 302 retained	New production line will nearly double capacity; Pennsylvania offered \$160K in grants.	Mercer PA
Sharon Regional modernization	\$11.9M	550+ existing employer	Additional \$3M RACP brings state support to \$5M for major building-system and clinical upgrades.	Mercer PA
AMG Titanium - Neshannock	\$15.7M	50+	\$750K RACP supports 60,000-SF production expansion and 17,000-SF corporate headquarters.	Lawrence PA
Kimberly-Clark - Warren Mfg	\$800M	~500	Construction active; access-road design about 30% complete; first road phase targeted for early 2027.	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	\$32.7M renovation	450 by 2029	Building renovation underway; initial company occupancy targeted for summer 2027.	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+	Construction-manager-at-risk qualifications closed July 22; shortlist or selection is the next trigger.	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	-	Preconstruction meeting completed; equipment delivery underway; \$6.98M construction contract awarded.	Trumbull
Youngstown river / sewer infrastructure	\$10.35M sewer + dam work	-	\$1.19M Exal Court pump-station contract awarded; August start expected; no development agreement.	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
WRTA Transit Hub	\$60M concept	TBD	Planning/design funded at \$2.94M; full construction financing and mixed-use program remain unresolved.	Mahoning
Central Tower - Youngstown	\$21.66M	64 units	WRPA preliminary bond and sales-tax assistance approved; \$2M TMUD and \$4.25M historic credits in place.	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	\$2.4M EDA award	TBD	Port Authority authorized land/development-agreement negotiations for proposed 85-acre park; JEDD and infrastructure arrangements remain pending; no tenant announced.	Columbiana
Youngstown Technology Park	\$1.1M city site readiness	100-200 projected	Developer/site-preparation phase; initial 50,000-SF building contemplated with potential expansion to 200,000 SF; no tenant or committed private investment.	Mahoning
Meander Reservoir Dam Improvements	\$83M	-	\$38M FEMA grant restored; \$29M OWDA borrowing planned and \$16M local share required; first phase approved; fall 2026 start targeted with completion in 2029.	Mahoning / Trumbull
NEW Iten Defense - Saybrook	Not disclosed	Not disclosed	50,000-SF manufacturing expansion broke ground Aug. 5; new equipment/product lines planned.	Ashtabula
NEW Homestead Crossing	\$34.4M proposed total development cost	120 units	OHFA financing approvals in place, including up to \$21.5M in bonds; new construction.	Mahoning

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

FINAL THOUGHTS

This week's strongest development signals are about movement through the pipeline. Planning recommendations, groundbreakings, financing and lease activity show capital and development interest becoming more concrete across several sectors.