

## MARKET PULSE™

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## FROM THE EDITOR

## Next Test: Commitment

One of this week's biggest regional ideas is still only an idea, but now a tested one. A new feasibility study concludes that a natural-gas pipeline extending roughly 93 miles along the Route 11 corridor from the Ohio River to Lake Erie is technically feasible. The estimated investment is \$1.3 billion, with potential capacity of up to 3 billion cubic feet per day.

Elsewhere, projects moved beyond feasibility. Hermitage approved land-development plans for Meijer, Meijer Express and a new Wendy's at Hickory Fields. MCCTC opened a \$7.5 million Medical Wellness and Education Center. Struthers opened a \$1.18 million river-access project. And Vallourec's \$48 million premium-threading expansion remains under construction.

Studies and approvals can prepare the ground, but they are not the same as a market commitment. For the pipeline, the next tests are a builder, customers and financing. For other projects, they are permits, construction, workforce and execution.

*All items sourced Aug. 24-30 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                                                                                                                                                                                                                                                        |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Thursday, September 3 | Youngstown/Warren Regional Chamber hosts Salute to Business at the Eastwood Event Centre. The program includes Ohio Manufacturers' Association President Ryan Augsburger and a discussion of manufacturing, data-center growth and Ohio's energy landscape. |
| Friday, September 4   | YSU's Williamson College of Business Administration hosts its Professional Development Summit, bringing students together with industry professionals for career-path sessions and networking.                                                              |

Sources: [Regional Chamber](#) | [Youngstown State University](#)

## MARK YOUR CALENDAR

| Date                    | Item                                                                                                                                                                                                               |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Thursday, September 10  | BRITE Energy Innovators hosts its Grid to Growth Energy Innovation Summit in Columbus, focused on grid capacity, affordability, reliability and investment as AI and data-center demand expands.                   |
| Thursday, September 10  | North Beaver Township Zoning Hearing Board holds a 4:30 p.m. hearing on SS Penn LLC's appeal involving the Powder Mill Works preliminary development plan; an anticipated vote is identified in the public notice. |
| Monday, September 14    | Evidentiary hearing scheduled in the SOBE Thermal rate case before PUCO in Columbus.                                                                                                                               |
| Tuesday, September 15   | Oppidan is scheduled to meet with McDonald officials and residents regarding its potential data-center development at the former McDonald Steel property.                                                          |
| Friday, September 18    | MCCTC holds a ribbon cutting for its new Medical Wellness and Education Center.                                                                                                                                    |
| Wednesday, September 23 | Eastgate hosts its Metropolitan Transportation Plan / Transportation Improvement Program workshop.                                                                                                                 |

Sources: [BRITE](#) | [North Beaver Township public notice](#) | [SOBE hearing](#) | [McDonald forum](#) | [MCCTC ribbon cutting](#) | [Eastgate workshop](#)

## LEAD STORY

## Route 11 Pipeline Study Moves Regional Energy Concept to the Next Test

A new feasibility study concludes that a natural-gas pipeline extending approximately 93 miles along the Route 11 corridor from East Liverpool to Ashtabula is technically feasible. The Verdantas study, commissioned by Eastgate Regional Council of Governments and Lake to River Economic Development, estimates project cost at roughly \$1.3 billion. Industry reporting based on the 142-page study says a system could carry up to 3 billion cubic feet of gas per day.

The economic-development case is straightforward. Eastern Ohio sits above major natural-gas resources but lacks the transmission and distribution infrastructure needed to connect more of that supply directly to manufacturers and prospective industrial users within the four-county Lake to River region. The study found that areas of high industrial-development potential and high energy demand overlap along the corridor. Thirty manufacturers participated in the demand survey, while more than 14 energy-industry representatives were interviewed.

But this is not yet a pipeline project. No builder or customer is committed. Lake to River's next step is a request for information seeking parties with the technical, financial and operating capability to participate. At least three firms interviewed during the study were characterized as highly interested in investing, but responses to the RFI will determine whether the concept advances and on what timetable.

The study therefore moves the proposal across an important threshold: from a long-discussed regional idea to an analyzed infrastructure opportunity. The next threshold is whether private parties are prepared to commit capital and demand.

Sources: [Business Journal Daily](#) | [Marcellus Drilling News](#)

### STRATEGIC SIGNALS

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## Meijer Plans Clear Next Approval at Hickory Fields

Hermitage commissioners approved land-development plans for a Meijer Superstore, Meijer Express gas station and convenience store and a new Wendy's at Hickory Fields, advancing the redevelopment of the former Shenango Valley Mall site.

Target, already under construction there, remains on schedule for an early 2027 opening and has begun adding exterior signage. The Meijer-related approvals are significant but are not construction authorizations: state permits and additional steps are still required before work can begin.

Source: [City of Hermitage](#)

## Land Banks Move From Demolition Toward Development

Mahoning County Land Bank Executive Director Debora Flora has begun a two-year term as president of the 71-member Ohio Land Bank Association at a time when many Ohio land banks are shifting from demolition toward redevelopment, land assembly and housing production.

That evolution has particular relevance in the Valley, where the cost of new housing can exceed the values achievable in some neighborhoods. Land banks can assemble sites, support infill construction and use programs such as Welcome Home Ohio to help close that gap. Flora also will host the association's statewide conference in Canfield next April, with Mahoning, Trumbull, Columbiana and Ashtabula County projects expected to be featured.

Source: [Business Journal Daily](#)

### EMPLOYER WATCH

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## Vallourec \$48 Million Threading Expansion Moves Toward Completion

Vallourec's \$48 million investment in additional premium-threading capacity at its Youngstown operation remains under construction, with completion expected by early 2027. The new high-torque threading line is designed to serve

increasingly long horizontal shale wells that place greater technical demands on tubular connections.

The project, expected to support 40 jobs, strengthens a manufacturing operation tied directly to domestic shale production while adding higher-value finishing capacity in Youngstown.

Source: [Vallourec](#)

## WORKFORCE & EDUCATION

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### MCCTC Opens \$7.5 Million Medical Wellness and Education Center

Mahoning County Career & Technical Center has opened its new \$7.5 million, 13,000-square-foot Medical Wellness and Education Center in Canfield. The project combines workforce training with health services through partnerships with Mercy Health and Cadence Care Network.

The facility includes EMT, paramedic and practical-nursing programs, clinical training space and a school- and community-based clinic. Mercy Health will provide primary and preventive care, while Cadence will provide mental and behavioral-health services. The project includes \$5 million from Ohio's Appalachian Community Innovation Centers program and is scheduled for a formal ribbon cutting Sept. 18.

Source: [Business Journal Daily](#)

## INFRASTRUCTURE & COMMUNITY DEVELOPMENT

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### \$1.18 Million River Launch Opens in Struthers

Struthers opened its new Community River Launch along the Mahoning River, converting an overgrown access area into a public riverfront amenity with a pavilion, play area, restrooms and improved access for kayaks and canoes.

The \$1.18 million investment is part of the broader Mahoning River Corridor Revitalization effort. Four of the nine dams identified in the program, including the former Struthers Dam, have been removed, with work or planning continuing on the remaining five. The launch pairs environmental restoration with public access and redevelopment amenities.

Source: [Business Journal Daily](#)

## POWER, DATA & SITE READINESS

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### Warren Township Begins Work on Temporary Data-Center Pause

Warren Township's zoning commission is drafting language for a temporary data-center moratorium while it develops permanent zoning standards. The township currently has no specific data-center zoning provisions.

The action remains preliminary. The zoning commission expects to continue work in September, but township trustees say the board itself has neither discussed nor decided on a moratorium. Market Pulse therefore treats Warren Township as a governance review in development, not as a jurisdiction with a moratorium in effect.

Source: [Tribune Chronicle](#)

### Powder Mill Appeal Returns Sept. 10

North Beaver Township's Zoning Hearing Board will hold a Sept. 10 hearing on SS Penn LLC's appeal of a June zoning determination involving the proposed Powder Mill Works development. The public notice says the board is expected to consider the appeal and anticipates taking a vote.

The hearing provides a defined next trigger after months of parallel zoning and legal proceedings in North Beaver and Mahoning townships. It does not constitute approval of the underlying data-center proposal.

Source: [North Beaver Township public notice](#)

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

## Youngstown Signals More Discipline on Future Tax Abatements

Youngstown officials are signaling that they want future Community Reinvestment Area tax-abatement requests generally closer to 75%, even as developers remain free to request larger incentives. The discussion came as the city's Tax Incentive Review Council extended six existing agreements and officials disclosed that the Mahoning Bank Building developer anticipates seeking a 90% abatement. A Central Tower request also is expected.

The city's existing enterprise-zone agreements provide useful context. Four active agreements reported 116 jobs created against 73 committed, \$39.03 million of investment against \$37.08 million committed and \$7.76 million in new payroll during the 2025 reporting year. Those agreements generated \$433,372 in tax savings. The emerging policy question is therefore not whether incentives produce benefits, but how much public participation individual projects require to close their financing gaps.

Source: [Business Journal Daily](#)

LEGISLATIVE & POLICY WATCH

## Ohio Data-Center Framework Remains in Senate

No material current-week action changes the five primary Ohio measures tracked in Issue #25. HB 646 remains pending in the Senate after its June 10 recommittal to the Senate Energy Committee. The remaining measures retain their prior status.

| Bill                   | Current Treatment            | Status / Significance                                                                                  |
|------------------------|------------------------------|--------------------------------------------------------------------------------------------------------|
| <a href="#">HB 646</a> | Data-center framework        | House-passed measure remains pending in the Senate; reported by Senate Energy and recommitted June 10. |
| <a href="#">HB 292</a> | Defense & aerospace          | Signed July 7; remaining provisions effective Oct. 6, with appropriations effective July 7.            |
| <a href="#">HB 361</a> | Development review           | Remains in House Local Government Committee.                                                           |
| <a href="#">HB 756</a> | R&D tax credit               | Remains in House Ways and Means.                                                                       |
| <a href="#">HB 844</a> | Technology investment credit | Remains in House Ways and Means.                                                                       |

Also monitoring: HB 983, HB 613, HB 921, SB 462, SB 428 and SB 250.

ECONOMIC INDICATORS

Mahoning and Trumbull County unemployment rates were unchanged in July, while Columbiana County improved slightly. Pennsylvania's July county rates for Lawrence and Mercer are not scheduled for release until Sept. 1, after publication. Ohio initial unemployment claims declined by 100 for the week ended Aug. 22, while the 30-year fixed mortgage rate edged up one basis point to 6.66%.

| Indicator                        | Latest            | Prior            | Change        | Signal                                 |
|----------------------------------|-------------------|------------------|---------------|----------------------------------------|
| Mahoning County unemployment     | 4.6% July         | 4.6% June        | flat          | Stable month to month; below year ago  |
| Trumbull County unemployment     | 5.0% July         | 5.0% June        | flat          | Stable month to month; below year ago  |
| Columbiana County unemployment   | 3.8% July         | 3.9% June        | down 0.1 pts. | Modest improvement                     |
| Ashtabula County unemployment    | 3.6% June         | 3.2% May         | up 0.4 pts.   | July value not verified by publication |
| Lawrence County unemployment     | 3.9% June         | 4.0% May         | down 0.1 pts. | July release due Sept. 1               |
| Mercer County unemployment       | 4.3% June         | 4.2% May         | up 0.1 pts.   | July release due Sept. 1               |
| Ohio unemployment                | 3.4% July         | 3.6% June        | down 0.2 pts. | Statewide improvement                  |
| Pennsylvania unemployment        | 3.9% July         | 4.1% June        | down 0.2 pts. | Below U.S. rate                        |
| U.S. unemployment                | 4.1% July         | 4.2% June        | down 0.1 pts. | Slight improvement                     |
| Ohio initial unemployment claims | 4,403 w/e Aug. 22 | 4,503 prior week | down 100      | Weekly claims eased                    |
| Valley home sales                | 491 July          | 488 July 2025    | up 0.6%       | Essentially flat YoY                   |
| 30-year fixed mortgage rate      | 6.66% Aug. 27     | 6.65% Aug. 20    | up 0.01 pts.  | Little changed                         |

Sources: [BJD unemployment](#) | [Ashtabula / FRED-BLS](#) | [Lawrence / FRED-BLS](#) | [Mercer / FRED-BLS](#) | [BLS state rates](#) | [BLS U.S. rate](#) | [Ohio initial claims](#) | [Valley home sales](#) | [Freddie Mac PMMS](#)

Ashtabula County remains at the latest independently verified June value; July county data was not verified by publication. Pennsylvania county July data for Lawrence and Mercer is scheduled for release Sept. 1.

## 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.

Rows remain alphabetized by jurisdiction. \* = existing row materially updated this issue; NEW = jurisdiction added this issue. All unmarked rows carry forward from Issue #25.

| Jurisdiction                                      | Action Being Tracked                                  | Current Status                                                      | Effective Date / Next Trigger                                                                                                                        |
|---------------------------------------------------|-------------------------------------------------------|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ashtabula Township (Ashtabula OH)                 | One-year moratorium                                   | MORATORIUM IN EFFECT                                                | Growth Partnership reports trustees implemented a one-year moratorium as of June 2026; exact adoption date remains unverified.                       |
| Bazetta Township (Trumbull OH)                    | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective May 12 for 180 days; scheduled to expire Nov. 8 unless extended or replaced.                                                               |
| Boardman Township (Mahoning OH)                   | Moratorium / zoning study                             | MORATORIUM IN EFFECT                                                | One-year moratorium adopted April 28; scheduled to expire April 28, 2027.                                                                            |
| Braceville Township (Trumbull OH)                 | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective June 2 for six months; scheduled to expire Dec. 2.                                                                                         |
| Conneaut City (Ashtabula OH)                      | Moratorium / charter-cap proposal                     | MORATORIUM REJECTED — CHARTER CAP PROPOSAL UNDER CONSIDERATION      | Council rejected proposed moratorium Aug. 12; separate 25-MW charter-cap proposal remains under consideration.                                       |
| Cortland City (Trumbull OH)                       | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective June 1 for one year; scheduled to expire June 1, 2027.                                                                                     |
| Girard City (Trumbull OH)                         | Moratorium                                            | MORATORIUM ADOPTED                                                  | Effective July 13 for 12 months.                                                                                                                     |
| Hermitage City (Mercer PA)                        | Zoning restrictions / conditional-use standards       | RESTRICTIONS ENACTED                                                | Ordinance enacted July 22 and effective July 29; data centers are conditional uses in LI/HI districts with specific standards.                       |
| Howland Township (Trumbull OH)                    | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective June 10 for six months; scheduled to expire Dec. 10.                                                                                       |
| Hubbard City (Trumbull OH)                        | Moratorium / local policy review                      | MORATORIUM IN EFFECT                                                | Effective June 1, 2026-June 1, 2027; policy and infrastructure issues remain under review.                                                           |
| Hubbard Township (Trumbull OH)                    | Moratorium / disclosed developer interest             | MORATORIUM IN EFFECT — DEVELOPER INTEREST DISCLOSED                 | Effective Feb. 10, 2026-Feb. 10, 2027; preliminary interest in separate 75-acre site; no application or approval.                                    |
| Lawrence County Planning Commission (Lawrence PA) | Preliminary-plan review                               | PROJECT REVIEW PENDING                                              | North Beaver/Mahoning preliminary plan remains pending; no post-Aug. 12 disposition verified.                                                        |
| Lordstown Village (Trumbull OH)                   | Moratorium and extension                              | MORATORIUM EXTENDED                                                 | Extension effective July 5; scheduled to expire Jan. 1, 2027 unless further extended or replaced.                                                    |
| Mahoning Township (Lawrence PA)                   | Zoning controls / litigation                          | ZONING / LITIGATION UNDERWAY                                        | Powder Mill Works review remains subject to local and legal proceedings; no project approval implied.                                                |
| McDonald Village (Trumbull OH)                    | Local guidelines / disclosed developer interest       | ZONING REVIEW UNDERWAY — DEVELOPER INTEREST DISCLOSED               | Oppidan evaluating former McDonald Steel site; no site plan submitted; public forum Sept. 15.                                                        |
| New Beaver Borough (Lawrence PA)                  | Zoning ordinance review                               | ZONING REVIEW UNDERWAY                                              | Ordinance No. 2 of 2026 remains the local-review item.                                                                                               |
| Niles City (Trumbull OH)                          | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective May 20 for 180 days; scheduled to expire Nov. 16.                                                                                          |
| * North Beaver Township (Lawrence PA)             | Zoning controls / litigation                          | ZONING / LITIGATION UNDERWAY — HEARING SCHEDULED                    | SS Penn appeal hearing Sept. 10 at 4:30 p.m.; public notice anticipates a Zoning Hearing Board vote. No project approval implied.                    |
| Ohio statewide ballot issue                       | Statewide ballot proposal                             | 2026 BALLOT DEADLINE MISSED                                         | Signature threshold was not met for 2026; later effort remains possible.                                                                             |
| Pennsylvania statewide                            | GRID requirements / municipal pause legislation       | GRID REQUIREMENTS IN EFFECT / MUNICIPAL PAUSE LEGISLATION PENDING   | Executive Order 2026-05 effective Aug. 18; HB 2496 remains pending.                                                                                  |
| Sharon City (Mercer PA)                           | Zoning standards                                      | ZONING STANDARDS ADOPTED                                            | City Council adopted data-center standards in July; action is not project approval.                                                                  |
| Vienna Township (Trumbull OH)                     | Moratorium and extension                              | MORATORIUM EXTENDED                                                 | Extension runs Aug. 16-Oct. 16 while permanent zoning language proceeds through review.                                                              |
| Warren City (Trumbull OH)                         | Permanent-ban proposal / governance study             | BAN UNDER CONSIDERATION — TABLED / GOVERNANCE REVIEW PLANNED        | Proposed ban tabled July 22; further action expected after August recess.                                                                            |
| NEW — Warren Township (Trumbull OH)               | Temporary moratorium / zoning standards               | MORATORIUM UNDER DEVELOPMENT — NOT ADOPTED                          | Zoning commission is drafting temporary-moratorium language and plans additional work in September; trustees report no board discussion or decision. |
| Weathersfield Township (Trumbull OH)              | Moratorium                                            | MORATORIUM IN EFFECT                                                | Effective April 30 for six months; scheduled to expire Oct. 30.                                                                                      |
| Youngstown City (Mahoning OH)                     | Preliminary recruitment / municipal governance review | GOVERNANCE REVIEW / PRELIMINARY DISCUSSIONS — NO FORMAL APPLICATION | Public records document site and utility discussions; city reports no application, agreement, permit or site approval.                               |

Governance shading: red = moratorium/pause in effect; yellow = pending review, proposal or litigation; blue = enacted standards or requirements. Color reflects governmental posture, not project development status.

**CAPITAL PIPELINE TRACKER**

Rows remain alphabetized by project. \* = existing tracker row materially updated this issue; NEW = project added this issue. All unmarked rows carry directly from Issue #25 FINAL.

| Project                                         | Investment                              | Jobs / Units                          | Status                                                                                                                                                                   | County              |
|-------------------------------------------------|-----------------------------------------|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Amazon Bazetta DC                               | \$30M                                   | ~120                                  | Under construction; opening date pending.                                                                                                                                | Trumbull            |
| AMG Chrome - New Castle                         | \$15M                                   | TBD                                   | Opened; sole U.S. chrome-metal producer; 6,500-ton capacity.                                                                                                             | Lawrence PA         |
| AMG Titanium - Neshannock                       | \$15.7M                                 | 50+                                   | \$750K RACP supports 60,000-SF production expansion and 17,000-SF corporate headquarters.                                                                                | Lawrence PA         |
| Bristolville 25 / Lordstown                     | \$3.6B                                  | 120 projected                         | Lordstown moratorium extended 180 days effective July 5.                                                                                                                 | Trumbull            |
| CCL Container - Hermitage                       | \$16.3M                                 | 30 new / 302 retained                 | New production line will nearly double capacity; Pennsylvania offered \$160K in grants.                                                                                  | Mercer PA           |
| 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            |
| 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          |
| East Palestine Train Depot                      | \$889,545 contract                      | TBD                                   | Renovation contract awarded.                                                                                                                                             | Columbiana          |
| EOG/Encino - Utica Drilling                     | \$6.5B                                  | 1,000s                                | Regional upstream priority.                                                                                                                                              | Regional            |
| Everest Aluminum - Warren                       | \$19.5-33M                              | 70                                    | Tax abatement approved; site decision pending.                                                                                                                           | Trumbull            |
| FirstEnergy Grid - Trumbull                     | \$24M                                   | —                                     | 138-kV rebuild; Energize365 reliability work.                                                                                                                            | Trumbull            |
| Graphite One - Conneaut                         | \$1.4B Ph1                              | 150+                                  | Ohio EPA air-permit application administratively complete; technical review underway; no permit approval.                                                                | Ashtabula           |
| 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            |
| Innovation Hub - A&D                            | \$32.7M renovation                      | 450 by 2029                           | Building renovation underway; initial company occupancy targeted for summer 2027.                                                                                        | Mahoning            |
| Iten Defense - Saybrook                         | Not disclosed                           | Not disclosed                         | 50,000-SF manufacturing expansion broke ground Aug. 5; new equipment/product lines planned.                                                                              | Ashtabula           |
| K-C Distribution Center                         | \$160M                                  | 65                                    | Board decision pending.                                                                                                                                                  | Trumbull            |
| Keel Data Center - Sharon                       | \$5B                                    | 134                                   | Zoning and land-development approvals secured; environmental permits remain in process; Keel says Pennsylvania's GRID requirements do not alter its permitting schedule. | Mercer PA           |
| Kimberly-Clark - Warren Mfg                     | \$800M                                  | ~500                                  | Construction active; access-road design about 30% complete; first road phase targeted for early 2027.                                                                    | Trumbull            |
| Mahoning Co. Gov't Center                       | \$60M                                   | 400+                                  | Construction-manager-at-risk qualifications closed July 22; shortlist or selection is the next trigger.                                                                  | Mahoning            |
| Mahoning National Bank Bldg                     | \$18.5M                                 | 71 units                              | Renovation active.                                                                                                                                                       | Mahoning            |
| MCCTC LEAD Center                               | \$16M                                   | 100+ additional student capacity      | Roughly 40,000-SF workforce facility opened in August with robotics, automation, cybersecurity, AI/software, HVAC and welding programs.                                  | Mahoning            |
| NEW — MCCTC Medical Wellness & Education Center | \$7.5M                                  | —                                     | 13,000-SF health/workforce facility opened with Mercy Health and Cadence Care partnerships plus EMT, paramedic and practical-nursing training; Sept. 18 ribbon cutting.  | Mahoning            |
| McDonald Steel Site                             | \$3.25M                                 | —                                     | Oppidan is evaluating the former mill property for possible data-center development; no site plan submitted; Sept. 15 public forum next trigger.                         | Trumbull            |
| 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 |
| Mercy Health - Champion ER                      | \$50M project; \$843K bridge            | 75 prior estimate                     | Construction active; 32,000-SF Champion Emergency Care Center will include 25-bed freestanding ER, imaging and lab services; spring opening targeted.                    | Trumbull            |
| SB 450 Valley line items                        | Mult                                    | —                                     | Capital budget signed; local line items enacted.                                                                                                                         | Mult                |
| 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           |
| SoftBank/Stargate - Lordstown                   | \$3B+                                   | TBD                                   | Foxconn says Ohio manufacturing and R&D capabilities are expected to build in 2027 as AI-system demand grows; Lordstown transition continues.                            | Trumbull            |
| Trumbull Energy Center                          | \$1.2B                                  | —                                     | 953-MW Lordstown power plant completed / commercial operation.                                                                                                           | Trumbull            |
| Ultium Cells - Lordstown                        | \$2.3B                                  | ~1,400 expected as production resumes | Final group of temporarily laid-off hourly employees returned Aug. 17; production ramp expected after required training.                                                 | Trumbull            |

| Project                                 | Investment                 | Jobs / Units      | Status                                                                                                                                                       | County     |
|-----------------------------------------|----------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| * Vallourec - Premium Thread            | \$48M                      | 40                | Construction underway; new premium-threading line expected to be completed by early 2027.                                                                    | Mahoning   |
| Warren Peninsula Project                | \$851K                     | 306 units         | Awarded March 6.                                                                                                                                             | Trumbull   |
| Warren Steel Site                       | \$15M loan                 | —                 | Foreclosure; 360-acre industrial site.                                                                                                                       | 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   |
| YNDC Glenwood Cleanup                   | \$1M                       | —                 | EPA Brownfields grant supports assessment and cleanup.                                                                                                       | Mahoning   |
| YNG Aviation Education Center           | \$6.98M                    | —                 | Preconstruction completed; equipment delivery underway; \$6.98M construction contract awarded.                                                               | Trumbull   |
| Youngstown REDD Infill                  | \$2.5M                     | 220 units         | City Council authorized implementation of up to \$2.5M in REDD-funded infrastructure serving YNDC sites and Homestead Crossing.                              | Mahoning   |
| Youngstown river / sewer infrastructure | \$10.35M sewer + dam work  | —                 | \$1.19M Exal Court pump-station contract awarded; no development agreement.                                                                                  | Mahoning   |
| 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   |
| Zuharis / Project Astralus              | TBD                        | 2,000-5,000       | 510-acre data center + power plant + water concept; Q3 2027 target.                                                                                          | Columbiana |

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.

Sources: [MCCTC Medical Wellness & Education Center](#) | [Vallourec Youngstown expansion](#)

*The Lake-to-River pipeline study is intentionally not added to the Capital Pipeline because it remains a feasibility concept without a committed builder, customer or investment decision.*

## FINAL THOUGHT

Feasibility matters because it turns a broad ambition into a question the market can answer.

This week's strongest developments also show that capital, approvals, infrastructure and workforce have to line up. The Valley has no shortage of concepts. The next test is commitment.