



**INDUSTRY
OVERVIEW
SEGMENTS**

AI DATA CENTERS: STRUCTURAL STEEL, RACKING & ENCLOSURES



Table of Contents

- Executive Summary **3**
- What is Structural Steel, Racking & Enclosure Manufacturing for an AI Data Center?..... **4**
- Industry Overview **5**
 - Market Size & Growth Forecasts **5**
 - Market Drivers..... **6**
 - Challenges & Concerns **7**
- AI Data Center Structural Steel, Racking & Enclosure Components..... **8**
 - Building Shell & Structural Steel **9**
 - Racking Systems..... **10**
 - Enclosures **10**
- AI Data Center Structural Steel, Racking & Enclosure Developers and Manufacturers..... **12**
 - Data Center Construction..... **12**
 - Structural Steel..... **12**
 - Racking Systems and Enclosures **13**
- AI Data Center Structural Steel, Racking & Enclosure Trade Association Resources **14**
 - Trade Associations..... **14**
 - Funding Opportunities **14**
- Links..... **15**
- Energy Manufacturing in Appalachia Program **16**



Executive Summary

The accelerating build-out of data centers—driven by surging adoption of cloud computing, AI, and edge deployments—is fueling robust new demand for structural steel, racking, and enclosures.

These elements represent the backbone of digital infrastructure, enabling fast construction, scalability, and efficiency while meeting the evolving technical and regulatory demands of hyperscale, enterprise, and colocation facilities.

Market analysts project the global data center rack and enclosure segment will grow from about \$4.6–6.7 billion in 2024 to \$7.6–9.4 billion by 2030, with a CAGR between 6.9% and 12.7%. Meanwhile, structural steel consumption for U.S. data centers has reached record highs, reflecting the need for faster, modular, and sustainable construction approaches.

Companies that can respond with flexible, code-compliant, and energy-efficient products—especially manufacturers using sustainable steel and next-gen designs—have a significant opportunity to capture market share in this rapidly expanding sector.



Source: [Google](#)



What is Structural Steel, Racking & Enclosures for an AI Data Center?

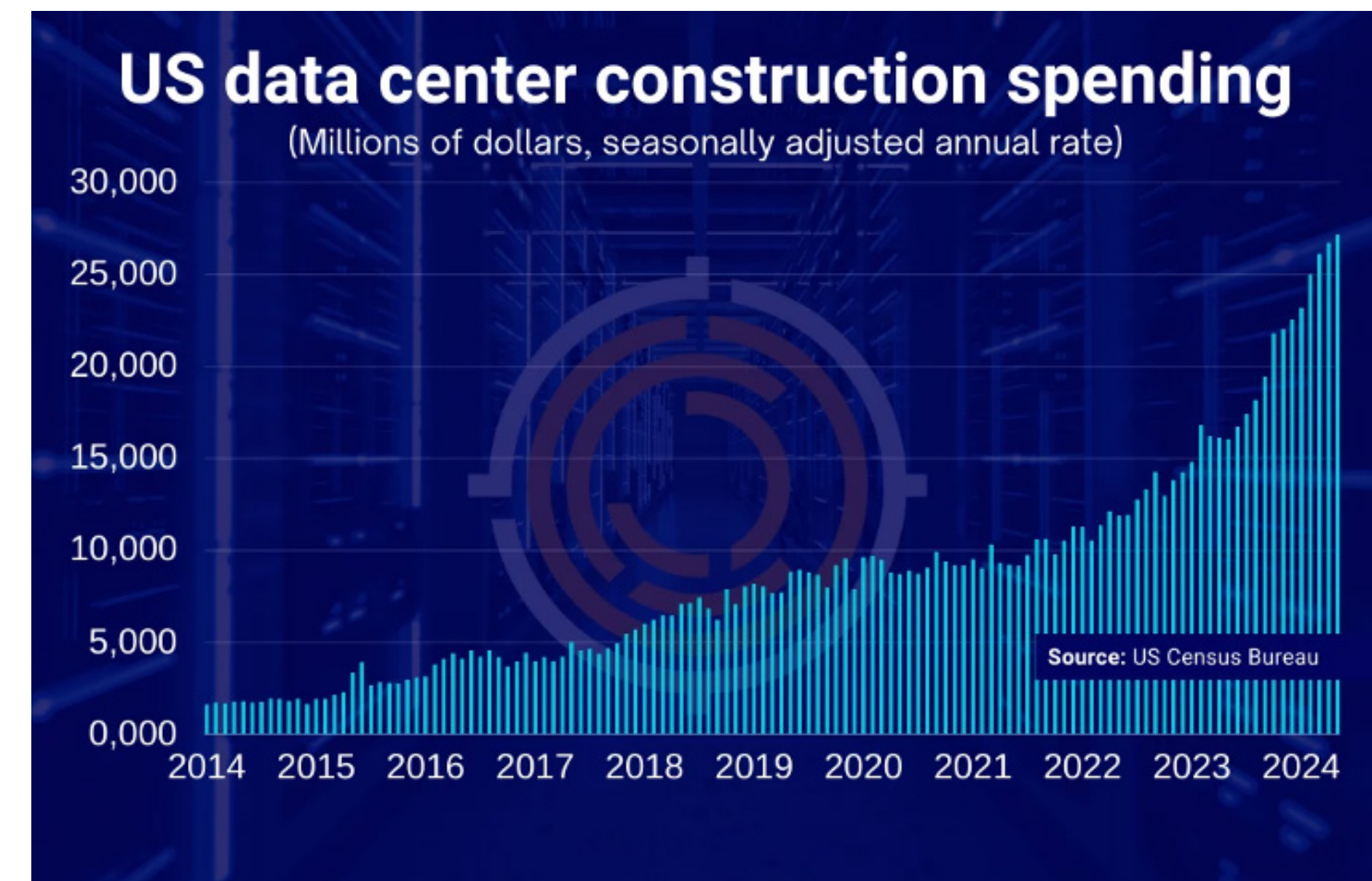
AI data centers are beginning to proliferate throughout our region and the United States, as described in the [Energy & Manufacturing in Appalachia](#) (EMA) program's [Overview of AI Data Centers](#). For small and medium-sized manufacturers, the structural steel, racking, and enclosures used in AI data centers present a potential market opportunity:

- **Structural steel** forms the framework of data center buildings, supporting the load of equipment and allowing for seismic, wind, and expansion compliance. Flexible, prefabricated steel solutions allow facilities to scale rapidly and adapt to new technologies or regulations.
- **Racking systems** are engineered frameworks for hosting servers, network devices, and power equipment. They maximize floor space, enable dense IT deployments, and integrate with advanced cooling and cable management. Modern racks are available as open, enclosed, modular, or “smart” racks that monitor critical operational parameters.
- **Enclosures** are cabinets or housings that protect sensitive equipment, ensure security, and enable thermal management—often integrating with airflow systems and sensors. These are designed to meet NEMA, UL, or ISO standards, and are available in a range of customizable, scalable, and durable materials.

About [20,000 metric tons](#) (30–40 pounds/square foot) of structural steel is used in hyperscale data centers in the United States. Large data centers typically have massive structural loads, multi-story designs, and dense internal infrastructure. The need for steel extends beyond primary framing to subsystems like raised floors, cable trays, and conduit, resulting in significantly more steel usage compared to typical commercial buildings.

One challenge increasingly facing AI data centers is the heavy weight load as AI server racks can weigh [1,000 pounds](#) more than those in traditional data centers. This has led some companies to move from multi-story to single-story data centers.

Steel is also used in the manufacturing of some of the devices used in data centers, like cooling systems, and in the energy systems that provide the electricity used in data centers, like wind turbines. These topics are discussed in other [EMA](#) reports and are not included in this report.



Source: [MEPS International](#), July 2025



Industry Overview

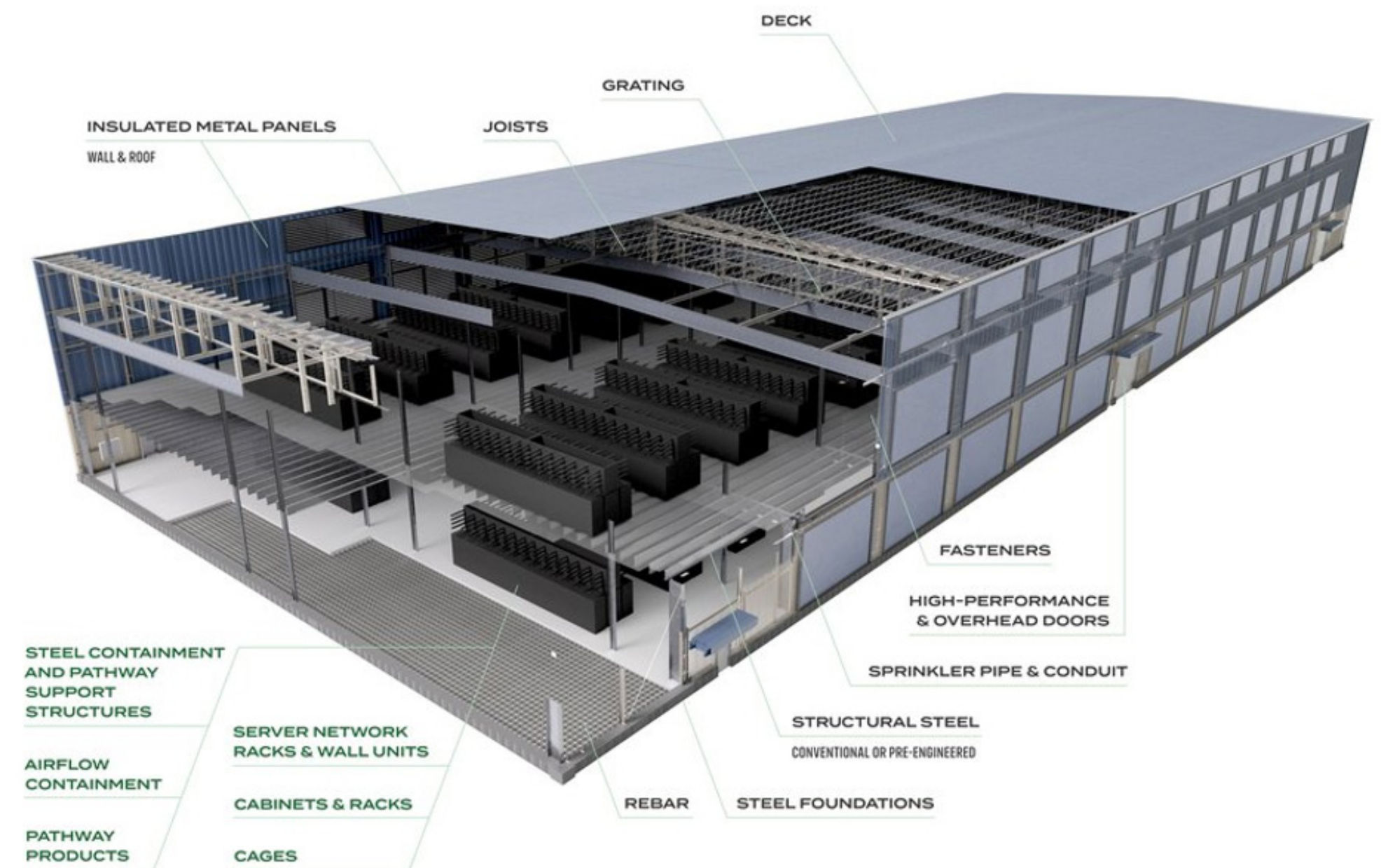
MARKET SIZE & GROWTH FORECASTS

Current and Future Market Value: Although there is no overall estimate for the structural steel market for data centers specifically, construction spending for data centers has increased at a rapid rate, as illustrated above. The market size for data center racks and enclosures, according to one recent [estimate](#), is \$5.2 billion in 2025, increasing to \$9.4 billion in 2030 with a compound annual growth rate (CAGR) of 12.7%.

Investment Trends: Today's AI-driven workloads not only require racks that can handle significantly greater weight and mounting capacity, but also demand enclosures with advanced airflow design and physical security measures. This [shift](#) has prompted operators to increase their investment in high-strength steel structures and specialized rack solutions, enabling faster expansion, improved resilience, and scalable performance to meet the rigorous demands of next-generation data processing environments.

Leading States and Emerging Markets: The leading states are Virginia, California, and Texas; however, AI data centers are also moving to other rural regions as these markets become increasingly saturated. Emerging markets include [Indiana](#), [Michigan](#), [Missouri](#), [Nebraska](#), [Nevada](#), [North Carolina](#), [North Dakota](#), [Ohio](#), [Pennsylvania](#), [South Carolina](#), [South Dakota](#), [Utah](#), [West Virginia](#), and [Wisconsin](#).

International Markets: Looking at [international markets](#), the Asia-Pacific region is experiencing significant growth in AI data centers, with countries such as China, India, Malaysia, Thailand, Japan, South Korea, Australia, Singapore, Taiwan, Indonesia, and Vietnam. In South America, Brazil is a key player, as are cities in the Middle East, such as the UAE and Saudi Arabia. European cities emerging are Berlin, Düsseldorf, Helsinki, Lille, Lisbon, Munich, Oslo, Turin, Warsaw, Reykjavik, and Zurich.



Data Center with Sustainable Steel
Source: [Nucor](#), Accessed August 2025



Industry Overview

MARKET DRIVERS

Government Support: Support at the federal level for AI data centers is strong, led by a Trump Administration executive order and actions to provide more access to federal land for data centers and streamlined permitting. Support varies by state, but overall is strong. For example,

- [New York](#) offers a tax exemption for data centers that purchase machinery, equipment, climate control systems, and power infrastructure.
- [Ohio](#) provides a partial or full state sales tax exemption on equipment for data centers that meet minimum investment and payroll thresholds.
- [Pennsylvania](#) exempts certified data centers from state sales tax if they invest \$75 million and create 25 new jobs within the state.

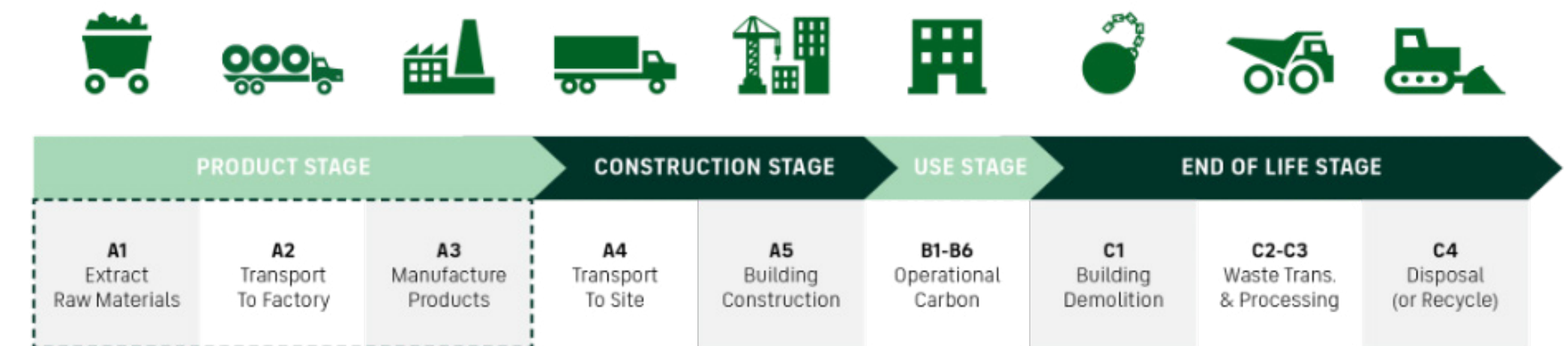
Environmental Goals: As data center companies strive to achieve their [sustainability objectives](#), some companies incorporate sourcing low-embodied-carbon or “green” steel, manufactured using renewable energy or recycled materials, into their construction. For example, [Amazon](#) began incorporating electric-arc furnace-produced steel in its data centers, which has half the carbon footprint of traditional basic oxygen furnace-produced steel.

Many data center developers are also targeting certifications, such as [LEED](#) (Leadership in Energy and Environmental Design), that prioritize resource-efficient materials and support closed-loop recycling practices throughout facility construction. Globally, over [1600](#) data centers are LEED-certified.

Technological Advancements: Given the rapid increase in demand for AI data centers, the focus of innovation is on constructing them as fast as possible.

For example, [prefabricated](#) and modular steel structures enable rapid assembly and deployment of entire data centers in a fraction of the time required for traditional construction, and facilitate seamless future expansion as technology needs evolve.

Next-generation data center racks and enclosures, often pre-engineered kits, are designed for quick installation, high-density server support, and integrated cable and airflow management, reducing both installation time and operational delays.



Stages Within A Lifecycle Assessment Enable Steel Industry Professionals To Calculate Environmental Product Declarations (EPDs)

Source: [Nucor](#), 2025

Industry Overview

CHALLENGES & CONCERNS

Regulatory Hurdles: All data center regulatory hurdles are similar to those for all new construction in regions where there are climate action plans or green building mandates. For example, some may require the use of low-carbon or recycled steel or supply chain transparency on production methods and potential contaminants like heavy metals.

As environmental pressures rise, future policies may further require end-of-life planning for steel components, favoring modular construction techniques and circular economy models that facilitate reuse or recycling.

Social license to operate: The Green Building Initiative's [Green Globes](#) program provides a certification program for sustainable building design for data centers. It "ensures building owners and operators are executing on their commitments to design and/or operational excellence and community impact while demonstrating accountability to stakeholders."

Environmental concerns: Environmental concerns related to the use of steel in data centers primarily focus on the high embodied carbon and energy intensity of steel production, as well as possible contamination. One response is for data centers to have an [Environmental Product Declaration \(EPD\)](#) for the steel they use in their centers. The requirements for EPDs for construction projects vary by [country](#) and U.S. state.

An EPD is a standardized, third-party verified document that provides transparent information about the [environmental impacts of a steel product](#), for example, throughout its entire lifecycle, from raw material extraction through manufacturing, use, and end-of-life recycling or disposal.

They are based on detailed [Life Cycle Assessments \(LCAs\)](#) and include key metrics such as greenhouse gas emissions, energy consumption, resource efficiency, recycled content, and recyclability.

For construction materials like steel, EPDs help architects, builders, and regulators compare products on environmental performance, support compliance with green building standards (such as LEED or Buy Clean requirements), and enable more sustainable material selection by disclosing verified, transparent, and comparable data.

Land use: While some [municipalities](#) treat data centers as industrial facilities during zoning, others are creating [specific land use regulations](#) for data centers. Some, for example, limit the ability to build a data center near residential or mixed-use areas, or require the establishment of buffer zones.



Source: [Data Center Resources](#)



AI Data Center Structural Steel, Racking & Enclosure Components

Structural steel, racking, and enclosure components form the backbone of AI data centers, supporting both the physical infrastructure and the demanding operational requirements of advanced computing environments. These elements work together to provide resilience, adaptability, and efficiency—critical foundations for future-proofing data centers as AI workloads grow in scale and complexity. Their primary benefits are:

- **Equipment Protection:** Robust steel structures and enclosures safeguard servers and sensitive equipment from physical damage, vibration, and unauthorized access
- **Performance Optimization:** Precision-engineered racks and enclosures enable optimal airflow, cable management, and component alignment, ensuring that high-density servers perform reliably under continuous heavy workloads.
- **Energy and Cost Savings:** Well-designed racking and enclosure systems enhance cooling efficiency and reduce energy usage by supporting effective separation of hot and cold aisles, ultimately lowering both operational costs and environmental impact.
- **Sustainability:** Use of recycled or low-emissions steel, along with modular enclosures, contributes to reduced embodied carbon and supports circular economy initiatives.
- **Scalability:** Modular and standardized structural components allow rapid expansion, reconfiguration, or upgrading of data center capacity with minimal disruption.

Key structural and enclosure components include:

- **Load-Bearing Steel Frameworks:** Provide the structural foundation for the data center, ensuring facility stability, seismic resilience, and safe support for high-density IT and mechanical equipment.
- **Modular Server Racks with Integrated Cable and Airflow Management:** Enable organized, high-density equipment installation, reduce cable congestion, and direct airflow precisely to optimize cooling and maintain consistent operational performance.
- **Aisle Containment Panels:** Physically separate hot and cold aisles to prevent thermal mixing, improve cooling efficiency, and support higher rack power densities essential for AI workloads.
- **Secure Enclosure Doors:** Protect sensitive IT infrastructure from unauthorized access while maintaining proper ventilation and containment for reliable environmental control.

The following table organizes key structural steel, racking & enclosure components, and technologies used for data centers according to their related North American Industry Classification System (NAICS) codes. Each component is grouped into relevant subcategories, offering concise descriptions and highlighting their specific applications within the data center environment. Subcategories included:

- Building Shell & Structural Steel
- Racking Systems
- Enclosures

Subcomponents within each are provided on the following pages.



AI Data Center Structural Steel, Racking & Enclosure Components

BUILDING SHELL & STRUCTURAL STEEL

COMPONENT	NAICS NUMBERS	NAICS NAME	DESCRIPTION	USE
Blast and Fire-Resistant Panels	332311	Prefabricated Metal Building and Component Mfg	Panels/barriers for enhanced envelope safety	Safety in mission-critical environments
Exterior Cladding/Wall Panels	332311	Prefabricated Metal Building and Component Mfg	Prefab metal or composite wall systems	Weather protection & insulation
Raised Floor Structures	238330	Flooring Contractors	Modular, steel-supported floors with airflow panels	Underfloor cable/cooling passage
Roof Trusses and Decking	332312/238160	Fabricated Structural Metal/ Roofing Contractors	Steel roof/decking structures with insulation	Roof support and weather resistance
Seismic Bracing/ Anchoring Systems	332312/332999	Fabricated Structural Metal/ Misc. Fabricated Wire Product Mfg	Steel bracing and anchor hardware	Seismic resilience, heavy load safety
Structural Steel Frames	332312	Fabricated Structural Metal Manufacturing	Main load-bearing support columns, beams, and joists	Building shell, room expansions
Utility Raceways	332999	Misc. Fabricated Wire Product Manufacturing	Segregated routing raceways for MEP (power, cable, etc.)	Organized distribution of infrastructure



AI Data Center Structural Steel, Racking & Enclosure Components

RACKING SYSTEMS

COMPONENT	NAICS NUMBERS	NAICS NAME	DESCRIPTION	USE
Cable Management Accessories	332999	Misc. Fabricated Wire Product Manufacturing	Horizontal/vertical managers, lacing bars, blanking panels	Cable airflow management
Earthquake-Proof/Specialized Mounts	332312	Fabricated Structural Metal Manufacturing	Locking hardware/mounting feet for seismic safety	Equipment protection
Modular Rack Frames	333318	Other Commercial Service Industry Machinery	Tool-less, expandable frames	Quick deployment/upgrades
Rack-Mounted Cooling Modules	333415	Commercial & Industrial Machinery Mfg	Integrated air or liquid cooling units in racks	Local/server cooling
Server/Network Racks	333415	Commercial & Industrial Machinery Mfg	Open/enclosed steel racks, 19"/23" sizes	Equipment mounting, density opt.
Smart Racks	333999	Miscellaneous Machinery Manufacturing	Embedded sensor racks for monitoring	Thermal control, asset, security

ENCLOSURES

COMPONENT	NAICS NUMBERS	NAICS NAME	DESCRIPTION	USE
Aisle Containment Doors	332321	Metal Door & Frame Manufacturing	Sliding/swinging doors for aisle containment	Thermal isolation, access control
Custom/Edge Enclosures	332710	Machine Shops	Special enclosure fabrication	Modular/edge deployments
Environmental Sensor Housings	334513	Instruments & Related Products Mfg	Protective enclosures for sensors	Environmental monitoring



AI Data Center Structural Steel, Racking & Enclosure Components

COMPONENT	NAICS NUMBERS	NAICS NAME	DESCRIPTION	USE
Equipment Cabinets	332439	Other Metal Container Manufacturing	Secured, lockable cabinets, airflow doors	Security, organization, cooling
Micro Data Center Enclosures	332439/333415	Other Metal Container Mfg/Commercial & Industrial Machinery Mfg	Compact modular racks, power, cooling unit	Edge/satellite/remote deployments
Power/PDUs Enclosures	335999	Miscellaneous Electrical Equipment Mfg	Durable locking boxes with cable entries	Power distribution safety
Security Cage Systems	332999	Misc. Fabricated Wire Product Manufacturing	Lockable wire mesh cages for rack/server containment	Physical access security



Modular Data Center Under Construction
Source: [Equinex](#)



AI Data Center Structural Steel, Racking & Enclosure Developers and Manufacturers

The construction of most U.S. AI data center projects is by experienced firms that provide preconstruction, engineering integration, and critical infrastructure commissioning. These firms rely on manufacturers of structural steel, racks, and enclosures to provide some of the numerous components that make up today's data centers.

Structural steel developers and fabricators deliver robust, scalable structural steel frames, trusses, and seismic/thermal supports critical for the reliable physical foundation of AI data centers, enabling large vertical and horizontal expansions, long-span floor plates, and resilient, compliant building shells for extreme compute densities.

Manufacturers and integrators of data center enclosures and racking systems typically design, engineer, and fabricate both advanced racks and secure enclosures as part of an integrated product suite. Their solutions are critical to safely and efficiently housing, cooling, and powering extremely dense AI server and GPU deployments.

A list of some of the leading companies is provided below.

DATA CENTER CONSTRUCTION

- **AECOM:** With a strong presence in project management, engineering, and large integrated builds, AECOM is frequently selected for complex, multi-phase data center developments alongside or in partnership with top GCs.
- **DPR Construction:** One of the largest and most experienced builders of data centers nationwide, DPR Construction is known for advanced project delivery and sustainable construction practices.
- **Holder Construction:** Holder is recognized as one of the top data center contractors by volume and revenue and is frequently chosen for speed, technical quality, and massive multi-hall developments.

- **Jacobs Solutions:** A global leader in engineering, design, and construction for digital infrastructure; Jacobs executes integrated planning, project management, and engineering for many of the largest campuses in the U.S. and worldwide, including complete turnkey services from site prep to commissioning.
- **Skanska USA:** Skanska engages in major, sustainable, and high-volume digital infrastructure projects, with a strong focus on environmental performance and efficient delivery.
- **Turner Construction Company:** A leading general contractor in both domestic and international projects, Turner routinely handles major data center campuses for the world's largest tech firms, utilizing advanced techniques such as BIM and prefabrication for speed and reliability.
- **Whiting-Turner Contracting Company:** Whiting-Turner delivers robust construction solutions and is a consistent player in the U.S. for large-scale data centers, executing complex projects across regions.

STRUCTURAL STEEL

- **Allied Steel Buildings:** Well-known for modular, pre-engineered steel building systems, delivering shells and framing for rapid data center construction and AI facility expansion.
- **Banker Steel:** Headquartered in Virginia with multiple regional plants, Banker Steel provides fabrication and erection for high-security, mission-critical, and hyperscale data center buildings across the Eastern and Midwestern U.S.
- **Basden Steel:** A leading Texas-based fabricator and erector of structural steel, Basden Steel supports industrial, commercial, and data center projects, with capacity for both traditional and modular approaches.



AI Data Center Structural Steel, Racking & Enclosure Developers and Manufacturers

- **Lexicon:** National structural steel fabrication and erection contractor experienced in data center shells and fast-track, high-security projects.
- **Nucor:** The largest U.S. steel producer, Nucor supplies beams, columns, plate, and custom-fabricated modules using sustainable electric arc furnace technology, widely utilized in data center construction.
- **Schuff Steel:** Among the largest steel fabricators and erectors in the country, Schuff Steel frequently supplies large-scale data centers, complex commercial structures, and projects with high capacity and precision needs.
- **U.S. Steel:** Major integrated U.S. steelmaker providing beams, columns, and plate for infrastructure, commercial, and data center projects, especially those requiring domestic sourcing or large volumes.

RACKING SYSTEMS AND ENCLOSURES

- **AMCO Enclosures:** Amco provides custom and standard server racks, seismic racks, cabinets, cold aisle containment, and modular enclosures manufactured in the U.S..
- **Black Box Corporation:** Black box produces modular racks, cabinets, and fully integrated IT enclosure solutions for data centers and network operations.
- **Chatsworth Products:** Chatsworth designs and manufactures cabinets, racks (including seismic and high-density), and integrated infrastructure solutions for mission-critical and edge environments.
- **Eaton:** Eaton supplies both racks and highly-engineered cabinet enclosures supporting advanced airflow, monitoring, and security features for AI data centers.
- **Hammond Manufacturing:** Hammond provides electrical and electronic enclosures and rack mounting solutions.
- **IMH Products:** IMH provides custom machining, sheet metal fabrication, and assembly for server racks, cabinets, airflow panels, mounting, and power distribution custom enclosures.
- **Legrand:** Legrand manufactures server racks and cabinet lines, along with extensive cable management and enclosure accessories.
- **Maysteel Industries:** Maysteel offers precision sheet metal enclosures, OEM custom server racks, aisle containment structures, and modular cabinet solutions.
- **nVent Hoffman:** nVent manufactures racks and cabinets, cable management and pathway solutions, and networking accessories
- **Rackmount Solutions:** Rackmount provides a wide range of customizable rack enclosures, wall mount cabinets, and mobile racks designed for small to large-scale IT/ data center deployments.
- **Saginaw Control & Engineering:** Saginaw manufactures standard and custom-designed enclosures made from various materials like steel, stainless steel, and non-metallic options, and meeting different NEMA ratings for environmental protection.



AI Data Center Structural Steel, Racking & Enclosure Trade Associations & Resources

TRADE ASSOCIATIONS

Association for Computer Operations Management: AFCOM serves as a leading professional organization for individuals engaged in data center and IT infrastructure management.

Associated General Contractors of America: AGC represents a broad range of construction firms, including those specializing in data center construction.

American Institute of Steel Construction: AISC develops and maintains standards for the design, fabrication, and erection of structural steel buildings. The institute provides education, technical resources, and certification programs to promote safety, innovation, and best practices for steel construction across a range of building types, including mission-critical facilities such as data centers.

Data Center Coalition: DCC serves as the membership association for the data center industry, advocating for favorable business climates, policies, and investments that support the sector's growth and success. DCC engages in public policy advocacy, thought leadership, and community outreach to promote the economic and community-building impacts of data centers.

Metal Building Manufacturers Association: MBMA serves as the leading advocate for the metal building systems industry, offering research, technical guidance, and education on the use of modular steel solutions. The association works closely with manufacturers, architects, and contractors to promote efficient, cost-effective, and high-performance metal buildings for industrial, commercial, and technology infrastructure applications.

Open Compute Project: OCP accelerates innovation in hardware design and data center infrastructure by developing and promoting open, vendor-neutral standards. OCP's collaborative community creates interoperable specifications for racks, power, and cooling systems, enabling greater flexibility, efficiency, and scalability for operators and manufacturers worldwide.

Uptime Institute: Uptime Institute (UI) is an independent advisory organization dedicated to enhancing the performance, efficiency, and reliability of business-critical infrastructure through innovation, collaboration, and impartial performance certifications. It is globally recognized for establishing and administering the Tier Standards & Certifications for data center design, construction, and operational sustainability.

FUNDING OPPORTUNITIES

DOE Manufacturing and Energy Supply Chains: The US Department of Energy's Manufacturing and Energy Supply Chains (MESC) office serves as the frontline of America's energy manufacturing deployment and supply chain security. Their mission is to enhance economic and national security by eliminating vulnerabilities in the United States' energy supply chains.

The MESC offers competitive grant opportunities for small to medium-sized manufacturers that focus on manufacturing expansion and workforce training. Efforts span battery storage, grid components, critical minerals processing and recycling, energy generation, nuclear power, buildings and energy efficiency, transportation, and industrial materials. Funding opportunities are announced periodically throughout the year. The office also publishes reports on supply chain needs, market opportunities, guidance documents, and factsheets.



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Energy & Manufacturing in Appalachia Program

AI Data Centers: Structural Steel, Racking & Enclosures for AI Data Centers was created under the Energy & Manufacturing in Appalachia (EMA) program made possible with grant funding from the Appalachian Regional Commission. EMA provides technical assistance and business support to small and medium manufacturers and enterprises seeking to expand business, production and jobs in the energy supply chains. Energy is a big expense for manufacturing companies. EMA helps companies save money with energy efficiency and emissions reductions.

This report was drafted by Dr. Deborah D. Stine, founder of the Science & Technology Policy Academy. She previously served as the Executive Director of the President Obama's Council of Advisors on Science and Technology, a Science & Technology Specialist at the Congressional Research Service, a study director at the National Academies of Sciences, Engineering, and Medicine, and as a professor of the practice in engineering and public policy at Carnegie Mellon University. Contact Dr. Stine at deborah@scitechpolicyacademy.com.

The EMA program supports Appalachia in 156 counties of Maryland, New York, Ohio, Pennsylvania, and West Virginia. This program was established to help small and medium manufacturers be a part of this Energy Economy. This program is managed by Manufacturing Extension Partnership (MEP) organizations from five Appalachian states. The activities and intended outcomes of EMA align with the National Institute of Standards and Technology (NIST) MEP and its mission to enhance the productivity and technological performance of U.S. manufacturing.

Learn more about the Energy & Manufacturing in Appalachia program by visiting: <https://www.wemakeithere.org/energy/> and join the EMA [LinkedIn group](#). Contact EMA Program Manager, Tom Reed, directly at Tom@WeMakeItHere.org and (412) 918-4269 with any questions or assistance.