

Chenango County

ECONOMIC TRENDS ANALYSIS

Update June 2024

PREPARED FOR:

Colliers Engineering and Design
Chenango County

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EXECUTIVE SUMMARY

Economic Snapshot

The County continues a path of steady recovery following the 2020 pandemic. Since 2020 approximately half of the county's industries recouped some or all of jobs they lost during the pandemic. Manufacturing and Accommodation and Food Services have added the most jobs in the post-pandemic period, while other sectors, such as Health Care and Social Assistance, as well as Finance and Insurance, have sustained further job loss since the initial pandemic shock.

Despite positive trends in some of the county's most specialized industries, job losses exceeded job growth between 2018-2023. Jobs were down -2.8% during these five years. The County fared better than the Southern Tier, which lost -5.0% of its employment base over 2018-2023.

Manufacturing industries propelled the county's Gross Regional Product (GRP) forward in the last five years. From 2018-2022, Chenango County saw steady GRP growth. From 2021-2022, GRP grew by about 30%.

Production occupations account for the largest share of Chenango County's workforce. This is correlated to the county's concentration of Manufacturing industries. 15% of Chenango County's jobs are in Production Occupations, compared to only 7% in the Southern Tier overall.

Chenango County is a net exporter of workers, meaning that more people commute out of Chenango for work than in. Around 60% of Chenango County's residents work in other counties like Broome, Onondaga, and Otsego.

Manufacturing

- Manufacturing is a powerhouse industry in Chenango County. It plays a large role in the stability and growth of the county's economy and has propelled economic growth since the pandemic.
- Manufacturing netted more job growth from 2018-2023 than the next four fastest-growing industries combined.
- The growth of the manufacturing industry drove GRP growth in 2022. From 2018-2022, Manufacturing GRP in Chenango County increased from \$824.6 million to almost \$1.1 billion.
- Chenango County's most concentrated manufacturing industries also tend to have high average earnings. For example, Dairy and Pharmaceutical Manufacturing have average earnings of over \$100,000 annually.
- Nearly all of Chenango County's largest manufacturing industries experienced notable job growth in the last five years. However, the county's smaller manufacturing industries experienced a combined 20% decline in employment during the five years from 2018-2023.

Agriculture

- Despite a declining number of farms in Chenango County, the total farming land area, the value of sales, and farm income all increased from 2017 to 2022 (*based on the 2022 US Agriculture Census*).
- In 2022, Chenango County dairy farmers had sales of over \$71.6 million, accounting for 58% of the total value of agricultural products sold by Chenango County farmers that year.

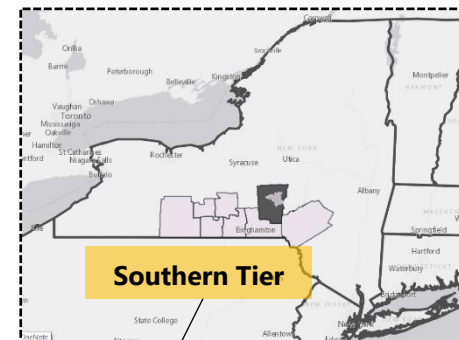
Entrepreneurship

- 6% of Chenango County's total employment is represented by self-employed workers, accounting for 1,039 jobs in 2023.
- As of 2021, about 4.5% of all businesses in Chenango County were less than a year old. Chenango County performs similarly to other Southern Tier Counties in this regard – other than Delaware and Schuyler Counties, the Southern Tier counties have startup rates that generally fall between 3.5%-5%.

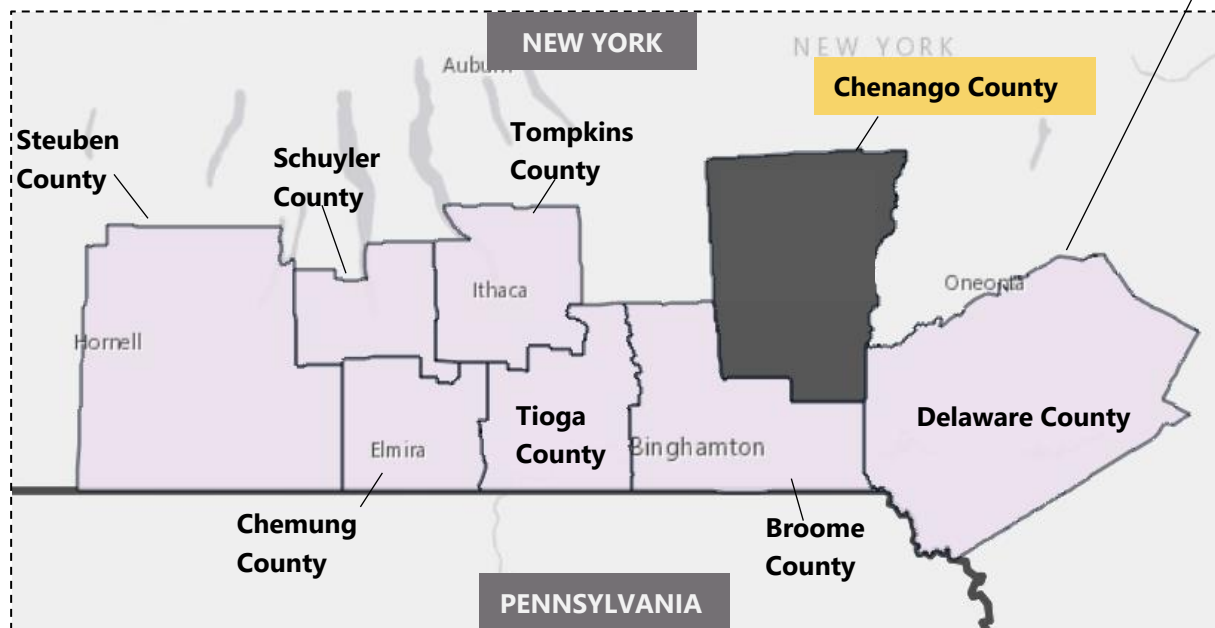
INTRODUCTION

The economic trends analysis considers several different geographical areas to compare local and regional trends, as well as to align with the available data sources.

Chenango County is the primary study geography. New York State’s Southern Tier Regional Economic Development Council (REDC) area was used as a comparison geography for Chenango County. The **Southern Tier REDC** includes Broome, Chemung, Delaware, Schuyler, Steuben, Tioga, Tompkins, and Chenango Counties.



STUDY AREA MAP



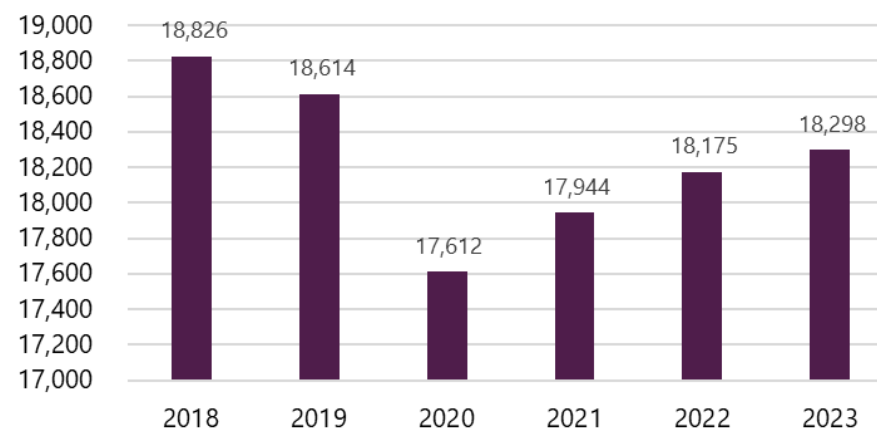
ECONOMY OVERVIEW

Total Jobs

Chenango County has seen steady employment growth since the COVID-19 economic shock, while 2022 was a strong year for GRP growth. Note that jobs counts provided in this section are jobs that are within the county boundaries, irrespective of where a worker lives.

- Chenango County had just over 18,600 total jobs before the pandemic in 2019 but experienced a job loss of approximately 1,000 jobs in 2020.
- Since 2020, the County has recovered almost 700 jobs, bringing overall employment to within approximately 300 jobs of the pre-pandemic level of 2019.
- From 2018-2022, Chenango County saw steady GRP growth. Between 2021-2022, GRP grew significantly, adding 30% from around \$2.11 billion to nearly \$2.75 billion.
- The growth of the manufacturing industry drove GRP increases in 2022. From 2018-2022, Manufacturing GRP in Chenango County increased from \$824.6 million to almost \$1.1 billion. See page 16 for the breakdown of manufacturing subsectors contributing to this growth.

Total Jobs in Chenango County, 2018-2023



Source: Lightcast

Total Jobs and Job Change, 2018-2023

Geography	2018 Jobs	2023 Jobs	Job Change	% Job Change
Chenango County	18,826	18,298	(528)	-2.8%
Southern Tier REDC	285,660	271,369	(14,291)	-5.0%
New York	10,433,046	10,412,585	(20,461)	-0.2%
United States	165,130,759	171,071,791	5,941,032	3.6%

Source: Lightcast

High-Level Job Distribution

- Manufacturing is the largest sector in Chenango County, with over 5,100 jobs, or 28% of total employment.
- Manufacturing is followed by Government, with over 3,900 jobs, and Retail Trade, with about 1,900 jobs in 2023

Sector Characteristics in Chenango County, 2023

Industry	Total Jobs	% of Total
Agriculture, Forestry, Fishing and Hunting	388	2%
Mining, Quarrying, and Oil and Gas Extraction	2	0%
Utilities	39	0%
Construction	711	4%
Manufacturing	5,116	28%
Wholesale Trade	175	1%
Retail Trade	1,913	10%
Transportation and Warehousing	382	2%
Information	255	1%
Finance and Insurance	1,058	6%
Real Estate and Rental and Leasing	224	1%
Professional, Scientific, and Technical Services	243	1%
Management of Companies and Enterprises	53	0%
Administrative and Support and Waste Management and Remediation Services	549	3%
Educational Services	86	0%
Health Care and Social Assistance	1,603	9%
Arts, Entertainment, and Recreation	130	1%
Accommodation and Food Services	858	5%
Other Services (except Public Administration)	550	3%
Government	3,921	21%
Total, All Sectors	18,298	100%

Source: Lightcast

Note: The Government sector includes all state, local, and federal jobs, including all public K-12 education.

Employment Dynamics During and After COVID-19

Some of Chenango County's sectors have been more resilient post-pandemic than others, including those most impacted by COVID-19 such as Accommodation and Food Services and Retail Trade.

- Nearly all sectors experienced job loss between 2018-2020, much of which was driven by COVID-19 related impacts.
- Government was the hardest-hit sector during the pandemic, driven primarily by losses in public education. Of the total 317 jobs lost in Government from 2018-2020, 259 of these jobs came from Local Government Education and Hospitals.
- However, since 2020, approximately half of sectors within the county have recouped some or all of these lost jobs. Manufacturing and Accommodation and Food Services have added the most jobs in the post-pandemic period, while other sectors, such as Health Care and Social Assistance, as well as Finance and Insurance, have sustained further job loss since the initial pandemic shock.

COVID-19 Job Impacts and Recovery, Chenango County

NAICS	Industry Sector	Job Change		
		2018-2020	2020-2023	2018-2023
11	Agriculture, Forestry, Fishing and Hunting	34	30	64
21	Mining, Quarrying, and Oil and Gas Extraction	21	(27)	(5)
22	Utilities	(5)	1	(4)
23	Construction	(58)	36	(21)
31	Manufacturing	(71)	325	254
42	Wholesale Trade	(15)	4	(11)
44	Retail Trade	(132)	126	(6)
48	Transportation and Warehousing	(3)	15	12
51	Information	(85)	(33)	(119)
52	Finance and Insurance	(10)	(67)	(77)
53	Real Estate and Rental and Leasing	(0)	99	99
54	Professional, Scientific, and Technical Services	(26)	(19)	(45)
55	Management of Companies and Enterprises	(55)	(3)	(58)
56	Administrative and Support and Waste Management and Remediation Services	(50)	114	64
61	Educational Services	(3)	8	4
62	Health Care and Social Assistance	(72)	(78)	(150)
71	Arts, Entertainment, and Recreation	(73)	37	(37)
72	Accommodation and Food Services	(156)	191	35
81	Other Services (except Public Administration)	(149)	(53)	(201)
90	Government	(317)	(47)	(364)
Total, All Sectors		(1,214)	687	(527)

Source: Lightcast

Commuting

Around 60% of Chenango County’s residents work in other counties. The data suggests that Chenango County is a net exporter of workers, meaning that more people commute out of Chenango for work than in.

- Outside of Chenango County, the most common counties where workers live are Broome, Otsego, and Oneida.
- Similar county relationships exist where Chenango residents work, with Broome, Onondaga, and Otsego being the most common work locations for residents.

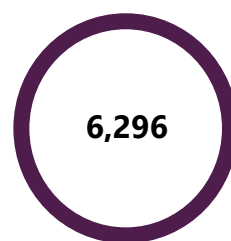
Top Counties where Chenango County Workers Live (2021)

County	Count	Share
Chenango County, NY	6,296	47.4%
Broome County, NY	1,466	11.0%
Otsego County, NY	981	7.4%
Oneida County, NY	778	5.9%
Madison County, NY	488	3.7%
Delaware County, NY	483	3.6%
Onondaga County, NY	388	2.9%
Herkimer County, NY	210	1.6%
Cortland County, NY	196	1.5%
Tioga County, NY	163	1.2%
All Other Locations	1,826	13.8%
Total	13,275	100.0%

Source: Census OnTheMap

**Work in
Chenango
County, Live
Elsewhere**

6,979



**Live and
Work in
Chenango
County**

**Live in
Chenango
County, Work
Elsewhere**

8,955

Top Counties where Chenango County Residents Work (2021)

County	Count	Share
Chenango	6,296	41.30%
Broome	1,922	12.60%
Onondaga	1,044	6.80%
Otsego	881	5.80%
Delaware	794	5.20%
Madison	502	3.30%
Oneida	380	2.50%
Cortland	351	2.30%
Monroe	327	2.10%
New York	284	1.90%
All Other Locations	2,470	16.20%
Total	15,251	100.00%

Source: Census OnTheMap

Note: Commuting data may count some workers who work from home.

Remote Workers

Approximately 7% of Chenango County workers aged 16+, totaling just over 1,400, work from home. This is according to data reflecting the five years from 2018-2022. The industries with the highest share of remote workers are Agriculture, Forestry, Fishing, and Hunting; Information; and Finance, and Insurance and Real Estate and Rental and Leasing, where over 20% of workers who live in Chenango County work from home.

By total number of workers, Finance and Insurance, and Real Estate and Rental and Leasing accounts for the most remote workers living in Chenango County, at just over 300. This is followed by Educational Services and Health Care and Social Assistance (242) and Manufacturing (225).

Chenango County Share of Workers who Work From Home by Industry (2022)

Industry	Number Work From Home	Percent Work From Home
Agriculture, forestry, fishing and hunting, and mining	149	25%
Construction	46	3%
Manufacturing	225	6%
Wholesale trade	0	0%
Retail trade	86	4%
Transportation and warehousing, and utilities	32	4%
Information	99	23%
Finance and insurance, and real estate and rental and leasing	305	23%
Professional, scientific, and management, and administrative and waste management services	129	11%
Educational services, and health care and social assistance	242	4%
Arts, entertainment, and recreation, and accommodation and food services	42	4%
Other services (except public administration)	53	7%
Public administration	3	0%
Armed forces	0	0%
Total, All Working Residents Age 16+	1,411	7%

Source: American Community Survey 2022 5-Year Estimates

Sector Characteristics

Manufacturing and Agriculture are Chenango County's most concentrated sectors, and both grew faster than expected from 2018-2023, given national economic and industry trends.

- Manufacturing; Agriculture, Forestry, Fishing, and Hunting; Government, Finance and Insurance; and Retail Trade are all industries with employment that is more concentrated in Chenango County than in the US on average. In addition to Manufacturing and Agriculture, Forestry, Fishing, and Hunting, Retail Trade also had a competitive advantage from 2018-2023.
- Utilities, Finance and Insurance, and Manufacturing are the sectors with the highest average earnings in Chenango County.

Sector Characteristics in Chenango County, 2023

Industry	Average Earnings Per Job	Location Quotient	Competitive Effect
Manufacturing	\$94,470	3.61	147
Agriculture, Forestry, Fishing and Hunting	\$51,174	1.81	66
Government	\$88,491	1.50	(348)
Finance and Insurance	\$101,752	1.41	(157)
Retail Trade	\$42,008	1.10	22
Information	\$57,512	0.73	(153)
Real Estate and Rental and Leasing	\$61,829	0.69	88
Health Care and Social Assistance	\$58,912	0.68	(246)
Construction	\$57,514	0.68	(76)
Utilities	\$144,119	0.64	(5)
Other Services (except Public Administration)	\$32,131	0.61	(165)
Accommodation and Food Services	\$23,351	0.57	37
Administrative and Support and Waste Management and Remediation Services	\$42,294	0.49	53
Transportation and Warehousing	\$77,287	0.48	(69)
Arts, Entertainment, and Recreation	\$31,662	0.41	(42)
Wholesale Trade	\$74,560	0.26	(17)
Management of Companies and Enterprises	\$54,689	0.19	(67)
Educational Services	\$28,010	0.19	4
Professional, Scientific, and Technical Services	\$70,635	0.19	(86)
Mining, Quarrying, and Oil and Gas Extraction	\$17,845	0.04	(4)

LQ > 1.0

Location Quotient and Competitive Effect

Both the location quotient and the competitive effect help to illustrate what makes a region unique.

Location quotient (LQ) is a measure of industry concentration within a region. An LQ of 1.0 means that an industry is as concentrated within the region as it is on a national level. An LQ greater than 1.0 indicates that an industry is more concentrated in a region than at the national level.

The **competitive effect** illustrates how much change in an industry is not explained by national economic or industry trends and is expressed in the number of jobs that a region gained or lost beyond expectations given national and industry trends. A positive competitive effect means that the region has unique characteristics giving it a competitive advantage in that respective industry.

Source: Lightcast

Chenango County's Most Concentrated Industries

Chenango County's employment is highly concentrated among a few key industries, many of which are in Manufacturing.

- All industries with a location quotient above 10.0 are Manufacturing industries. Dairy Product and General Purpose Machinery Manufacturing are the most concentrated, at 61x and 46x the average in the US.
- Chenango County's most concentrated industries also tend to be those with high average earnings, such as Dairy and Pharmaceutical Manufacturing.

This data reflects **industries** and includes all different types of occupations that work in a given industry. For example, Dairy Product Manufacturing includes all workers who work in the dairy industry, from technicians to managers and executives.

Most Concentrated Industries in Chenango County, 2023 (Location Quotient)



Source: Lightcast

Industries with Location Quotient of 2.5 or more in Chenango County, 2023

NAICS	Description	Jobs	2018-2023 Growth	Location Quotient	Average Earnings Per Job
3115	Dairy Product Mfg.	1,082	10%	61.31	\$122,190
3339	Other General Purpose Machinery Mfg.	1,420	24%	46.00	\$95,621
3111	Animal Food Mfg.	188	36%	23.69	\$84,224
3211	Sawmills and Wood Preservation	149	12%	14.38	\$69,818
3315	Foundries	158	121%	13.67	\$76,186
3149	Other Textile Product Mills	87	78%	12.34	\$68,926
3254	Pharmaceutical and Medicine Mfg.	419	0%	11.22	\$110,890
4851	Urban Transit Systems	46	382%	9.86	\$52,899
4572	Fuel Dealers	57	7%	7.05	\$70,122
3333	Commercial and Service Industry Machinery Mfg.	64	13%	6.55	\$87,977
3335	Metalworking Machinery Mfg.	115	18%	6.49	\$76,757
1152	Support Activities for Animal Production	29	(33%)	6.18	\$58,437
3219	Other Wood Product Mfg.	131	(0%)	4.54	\$63,757
3363	Motor Vehicle Parts Mfg.	274	(1%)	4.45	\$82,468
3332	Industrial Machinery Mfg.	62	(55%)	4.25	\$78,266
1133	Logging	29	(30%)	4.11	\$51,045
3399	Other Miscellaneous Mfg.	144	31%	4.06	\$87,410
3119	Other Food Mfg.	103	58%	3.71	\$87,881
1120	Animal Production	165	12%	3.34	\$48,627
9029	State Government, Excluding Education and Hospitals	735	(17%)	3.10	\$159,822
8134	Civic and Social Organizations	106	(28%)	2.95	\$13,953
5221	Depository Credit Intermediation	560	(8%)	2.91	\$96,144
5241	Insurance Carriers	417	1%	2.89	\$101,948
3261	Plastics Product Mfg.	186	31%	2.85	\$70,330
2212	Natural Gas Distribution	31	(21%)	2.57	\$148,564
3344	Semiconductor and Other Electronic Component Mfg.	109	4%	2.56	\$67,565

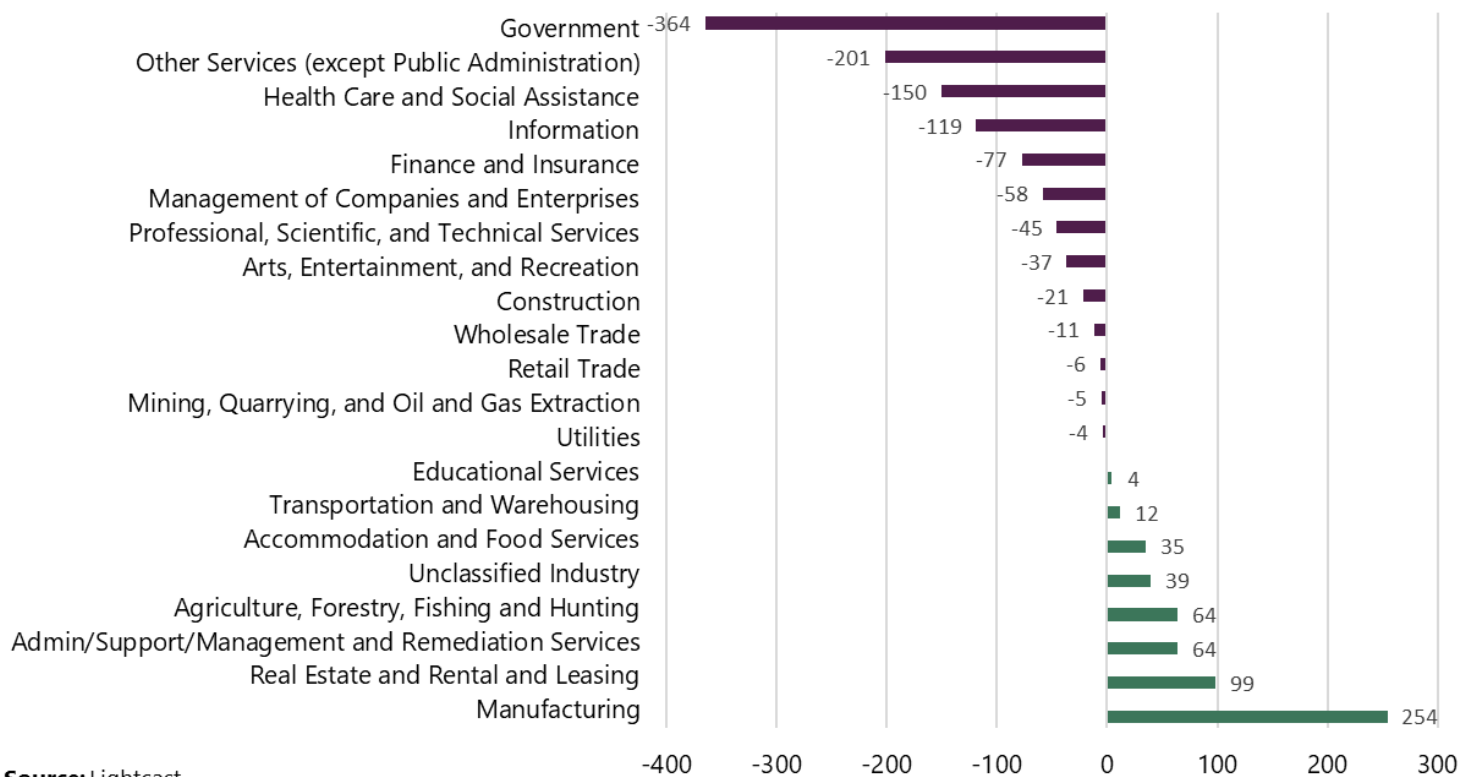
Source: Lightcast

Growing and Declining Sectors

Manufacturing netted more job growth from 2018-2023 than the next four fastest-growing sectors combined.

- Manufacturing added 254 new jobs during the five-year period, followed by Real Estate, Administrative, Support, and Waste Management, and Agriculture, Forestry, Fishing, and Hunting. Since 2020, Chenango County has recovered 687 jobs, driven by gains in Manufacturing, Retail Trade, and Accommodation and Food Services.
- Losses in other sectors offset job gains in the sectors noted above. The Government sector lost 364 jobs during this time (primarily driven by a decrease in state government and local education employment), the most of any sector, though most of this was largely due to pandemic effects in 2020 and 2021. Other sectors that were hard-hit by the pandemic, such as Health Care and Social Assistance, Information, and Arts, Entertainment, and Recreation also saw significant job losses, as did other sectors such as Finance and Insurance and Professional, Scientific, and Technical Services.

Job Change by Industry in Chenango County, 2018-2023



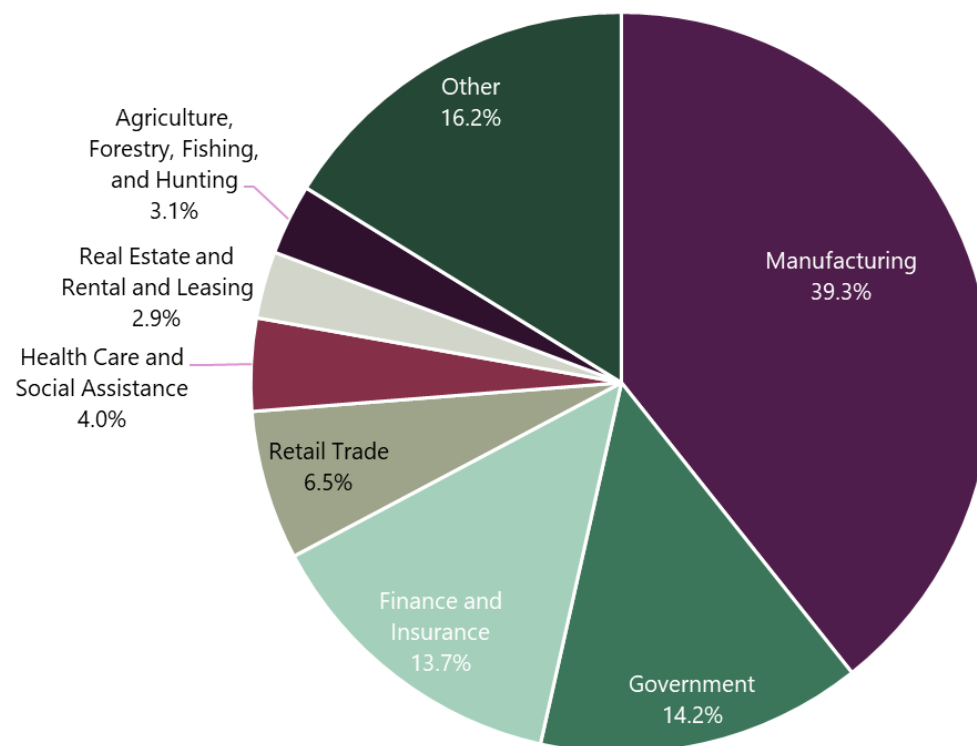
Source: Lightcast

Gross Regional Product

Chenango County's GRP is driven by Manufacturing, followed by Government, and Finance and Insurance.

- Manufacturing industries generated \$1.1 billion in GRP in 2022. This accounts for just over 39% of all the county's GRP.
- Finance and Insurance generated \$377.5 million in GRP for Chenango County which accounts for about 14% of GRP.

GRP Distribution by Industry in Chenango County, 2022



Source: Lightcast

Largest Industries by Total Jobs

Chenango County's economy is somewhat concentrated in industries with high average annual earnings.

- Three of the five largest industries by employment in Chenango County have average annual earnings higher than the average for all industries (\$73,225). These include Local Education & Hospitals, General Purpose Machinery Manufacturing, and Dairy Product Manufacturing.
- According to Commerce Chenango, the largest employers in Chenango County include Chobani in New Berlin (Dairy Product Manufacturing) and The Raymond Corporation in Greene (Other General Purpose Machinery Manufacturing). Both large employers have contributed to the growth of their respective industries and positively impacted the overall economy. Both of these industries are not only the largest employers but also have high earnings and strong employment growth over the last five years.
- Other large employer industries in Chenango County include Restaurants, Financial and Insurance industries, and Pharmaceutical and Medicine Manufacturing.

Top 10 Largest 4-Digit NAICS Industries in Chenango County, 2023

NAICS Description	2023 Jobs	% Change in Jobs		Establishments	Location Quotient	Avg. Earnings Per Job
		2018-2023				
9036 Education and Hospitals (Local Government)	1,781	(6%)		38	1.94	\$84,806
3339 Other General Purpose Machinery Manufacturing	1,420	24%		1	46.00	\$95,621
9039 Local Government, Excluding Education and Hospitals	1,248	(7%)		40	2.05	\$56,375
3115 Dairy Product Manufacturing	1,082	10%		2	61.31	\$122,190
7225 Restaurants and Other Eating Places	743	9%		67	0.63	\$22,710
9029 State Government, Excluding Education and Hospitals	735	(17%)		37	3.10	\$159,822
5221 Depository Credit Intermediation	560	(8%)		20	2.91	\$96,144
4552 Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	525	32%		21	2.20	\$37,182
3254 Pharmaceutical and Medicine Manufacturing	419	0%		4	11.22	\$110,890
5241 Insurance Carriers	417	1%		2	2.89	\$101,948
Total, All Industries	18,298	-2.8%		1,055	N/A	\$73,225

Source: Lightcast

Fastest Growing Industries

Top 25 Fastest-Growing Industries by Jobs, Chenango County, 2018-2023

NAICS	Description	Job Change	% Job Change
3339	Other General Purpose Machinery Manufacturing	274	24%
4552	Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	127	32%
5311	Lessors of Real Estate	98	149%
3115	Dairy Product Manufacturing	98	10%
3315	Foundries	87	121%
1110	Crop Production	74	113%
7225	Restaurants and Other Eating Places	64	9%
5613	Employment Services	50	23%
3111	Animal Food Manufacturing	50	36%
3261	Plastics Product Manufacturing	44	31%
3149	Other Textile Product Mills	38	78%
3119	Other Food Manufacturing	38	58%
4851	Urban Transit Systems	36	382%
6211	Offices of Physicians	36	21%
3399	Other Miscellaneous Manufacturing	34	31%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	30	8909%
6242	Community Food and Housing, and Emergency and Other Relief Services	29	2213%
4921	Couriers and Express Delivery Services	28	47%
2361	Residential Building Construction	25	28%
2389	Other Specialty Trade Contractors	24	19%
6117	Educational Support Services	21	808%
4599	Other Miscellaneous Retailers	21	34%
4881	Support Activities for Air Transportation	20	108%
6241	Individual and Family Services	19	15%
3335	Metalworking Machinery Manufacturing	18	18%

Source: Lightcast

Large employers and agribusiness industries are contributing to strong employment growth in the County.

- Other General Purpose Machinery Manufacturing, which includes The Raymond Corporation, added the most jobs to Chenango County's economy from 2018-2023 (+274, 24%).
- Industries related to agribusiness make up a large share of the job growth occurring within the county. This group includes **Dairy Product Manufacturing, Crop Production, Animal Food Manufacturing, and Other Food Manufacturing**. Together, these industries added a combined 259 jobs in the last five years.

Chenango County's Workforce

2- Digit SOC Occupation Distribution in Chenango County and the Southern Tier REDC, 2023

SOC	Description	Chenango County		Southern Tier	
		#	%	#	%
11-0000	Management	1,136	6%	15,507	6%
13-0000	Business and Financial Operations	949	5%	12,951	5%
15-0000	Computer and Mathematical	249	1%	6,873	3%
17-0000	Architecture and Engineering	372	2%	5,644	2%
19-0000	Life, Physical, and Social Science	158	1%	3,563	1%
21-0000	Community and Social Service	349	2%	6,524	2%
23-0000	Legal	116	1%	1,710	1%
25-0000	Educational Instruction and Library	1,427	8%	26,671	10%
27-0000	Arts, Design, Entertainment, Sports, and Media	187	1%	4,801	2%
29-0000	Healthcare Practitioners and Technical	657	4%	15,959	6%
31-0000	Healthcare Support	453	2%	11,179	4%
33-0000	Protective Service	654	4%	6,912	3%
35-0000	Food Preparation and Serving Related	1,038	6%	21,694	8%
37-0000	Building and Grounds Cleaning and Maintenance	434	2%	9,067	3%
39-0000	Personal Care and Service	285	2%	6,268	2%
41-0000	Sales and Related	1,469	8%	21,242	8%
43-0000	Office and Administrative Support	2,202	12%	33,444	12%
45-0000	Farming, Fishing, and Forestry	201	1%	1,702	1%
47-0000	Construction and Extraction	805	4%	10,113	4%
49-0000	Installation, Maintenance, and Repair	971	5%	12,052	4%
51-0000	Production	2,704	15%	17,798	7%
53-0000	Transportation and Material Moving	1,446	8%	19,200	7%
55-0000	Military-only	37	0%	496	0%
Total, All Occupations		18,298	100%	271,369	100%

Source: Lightcast

Production Occupations account for the largest share of Chenango County's workforce, which is unsurprising given the county's concentration of Manufacturing industries.

- 15% of Chenango County's jobs are in Production Occupations, compared to only 7% in the Southern Tier overall.
- Other top occupations in Chenango County are Office and Administrative Support, Sales and Related Occupations, Transportation/Material Moving Occupations, and Educational Instruction and Library Occupations.
- Chenango County has a lower concentration of Healthcare occupations, both practitioners and support, and lower concentration of workers in Educational Occupations as well as Food Preparation and Serving Occupations.

Top 10 5-Digit SOC Detailed Occupations in Chenango County

Most of the largest occupations in Chenango County have low barriers to entry.

- Retail workers, cashiers, and fast food workers make up the three largest occupations in Chenango County in 2023, each requiring no formal education credential for entry-level positions.
- Overall, most of the largest occupations in the county require a High School diploma or less. Exceptions to this include Teaching Assistants and General and Operations Managers.
- Note that the Typical Entry-Level Education column represents a snapshot of the industry, and actual requirements will likely vary from business to business, especially in a tight labor market.

Top 10 5-Digit SOC Detailed Occupations in Chenango County, 2023

SOC	Description	2023 Jobs	Typical Entry Level Education
41-2031	Retail Salespersons	425	No formal educational credential
41-2011	Cashiers	411	No formal educational credential
35-3023	Fast Food and Counter Workers	399	No formal educational credential
51-2098	Miscellaneous Assemblers and Fabricators	398	High school diploma or equivalent
25-9045	Teaching Assistants, Except Postsecondary	379	Some college, no degree
11-1021	General and Operations Managers	360	Bachelor's degree
49-9071	Maintenance and Repair Workers, General	346	High school diploma or equivalent
51-9111	Packaging and Filling Machine Operators and Tenders	316	High school diploma or equivalent
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	310	No formal educational credential
33-3012	Correctional Officers and Jailers	302	High school diploma or equivalent

Source: Lightcast

Job Openings

Fast Food Counter Workers, Cashiers, and Retail Salesperson were the most in-demand occupations in Chenango County from 2018-2023, and are projected to remain the most in-demand occupations in the next five years. Overall, there were an average of 2,715 job openings throughout the county from 2018-2023. From 2023-2028, the average annual openings are projected to decline slightly, to 2,319 per year.

Top In-Demand Occupations in Chenango County, 2018-2028

SOC	Description	2018-2023		2023-2028	
		Total Openings	Average Annual Openings	Total Openings	Average Annual Openings
35-3023	Fast Food and Counter Workers	489	98	520	104
41-2011	Cashiers	453	91	393	79
41-2031	Retail Salespersons	360	72	350	70
51-2098	Miscellaneous Assemblers and Fabricators	291	58	256	51
53-7065	Stockers and Order Fillers	279	56	270	54
31-1128	Home Health and Personal Care Aides	247	49	182	36
25-9045	Teaching Assistants, Except Postsecondary	245	49	242	48
51-9111	Packaging and Filling Machine Operators and Tenders	227	45	225	45
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	225	45	258	52
11-1021	General and Operations Managers	217	43	179	36
49-9071	Maintenance and Repair Workers, General	208	42	207	41
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	200	40	187	37
51-3092	Food Batchmakers	196	39	192	38
43-9061	Office Clerks, General	173	35	166	33
43-4051	Customer Service Representatives	168	34	163	33
Total, All Occupations		13,574	2,715	11,597	2,319

Source: Lightcast

INDUSTRY DEEP DIVE - MANUFACTURING PROFILE

General Purpose Machinery Manufacturing and Dairy Product Manufacturing account for approximately half of all Manufacturing employment in Chenango County.

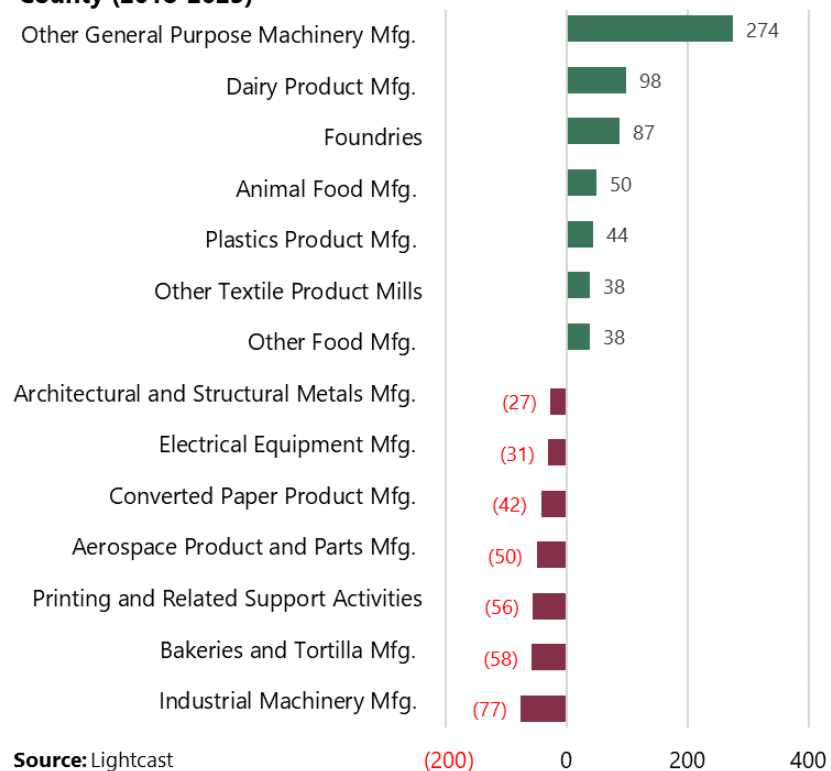
- This is likely driven by the presence of two large employers, including The Raymond Corp. (forklift manufacturing) and Chobani (dairy product manufacturing).
- Nearly all of Chenango County's largest manufacturing industries experienced notable job growth in the last five years. However, the county's smaller manufacturing industries experienced a combined 20% decline in employment during the five years from 2018-2023.

Top Manufacturing Industries in Chenango County, 2023

NAICS	Description	2023 Jobs	% of Total Manufacturing	2018-2023 Change	2018-2023 % change
3339	Other General Purpose Machinery Mfg.	1,420	28%	274	24%
3115	Dairy Product Mfg.	1,082	21%	98	10%
3254	Pharmaceutical and Medicine Mfg.	419	8%	0	0%
3363	Motor Vehicle Parts Mfg.	274	5%	(2)	(1%)
3111	Animal Food Mfg.	188	4%	50	36%
3261	Plastics Product Mfg.	186	4%	44	31%
3315	Foundries	158	3%	87	121%
3211	Sawmills and Wood Preservation	149	3%	16	12%
	All Other Mfg.	1,237	24%	(311)	(74%)
Total, All Manufacturing		5,116	100%	254	5%

Source: Lightcast

Industries with the Most Job Growth or Decline, Chenango County (2018-2023)



Source: Lightcast

Overall, Manufacturing added about 250 net new jobs to the Chenango County economy from 2018-2023, driven by growth in a few key industries.

- The fastest-growing manufacturing industry from 2018-2023 was General Purpose Machinery Manufacturing, which added almost 275 jobs.
- Other high-growth manufacturing industries during this time were Dairy Product Manufacturing, Foundries, and Animal Food Manufacturing.
- Conversely, Industrial Machinery Manufacturing experienced the steepest job loss, declining 77 jobs from 2018-2023.
- Other industries with the greatest job loss during that same period include Bakeries & Tortilla Manufacturing (-58), Printing & Related Activities (-56), and Aerospace Product and Parts Manufacturing (-50).

Chenango County's manufacturing workforce generally requires few educational barriers to entry and offers somewhat better wages than the overall economy.

Top 25 Occupations in Chenango County's Manufacturing Sector, 2023

SOC	Description	2023 Mfg. Jobs	% of Mfg. Jobs	Median Hourly Earnings	Typical Entry Level Education
51-2098	Misc. Assemblers and Fabricators	368	7.2%	\$18.24	High school or equivalent
51-9111	Packaging and Filling Machine Operators and Tenders	309	6.0%	\$18.23	High school or equivalent
51-3092	Food Batchmakers	182	3.6%	\$16.20	High school or equivalent
51-1011	First-Line Supervisors of Production and Operating Workers	182	3.6%	\$31.78	High school or equivalent
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	153	3.0%	\$16.59	No formal educational credential
49-9071	Maintenance and Repair Workers, General	148	2.9%	\$18.68	High school or equivalent
51-4121	Welders, Cutters, Solderers, and Brazers	147	2.9%	\$22.83	High school or equivalent
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	141	2.8%	\$22.51	High school or equivalent
51-4081	Metal and Plastic Multiple Machine Tool Operators	126	2.5%	\$24.03	High school or equivalent
11-1021	General and Operations Managers	119	2.3%	\$36.34	Bachelor's degree
41-4012	Sales Representatives, Wholesale and Mfg., (Except Sci. and Technical)	114	2.2%	\$29.39	High school or equivalent
17-2112	Industrial Engineers	114	2.2%	\$40.19	Bachelor's degree
43-5061	Production, Planning, and Expediting Clerks	109	2.1%	\$24.40	High school or equivalent
51-4041	Machinists	106	2.1%	\$22.77	High school or equivalent
51-2028	Electrical, Electronic, and Electromechanical Assemblers	100	2.0%	\$17.15	High school or equivalent
49-9041	Industrial Machinery Mechanics	87	1.7%	\$27.72	High school or equivalent
43-5071	Shipping, Receiving, and Inventory Clerks	82	1.6%	\$18.74	High school or equivalent
51-4072	Machine Operators	77	1.5%	\$13.80	High school or equivalent
17-2141	Mechanical Engineers	71	1.4%	\$40.40	Bachelor's degree
53-7064	Packers and Packagers, Hand	67	1.3%	\$15.05	No formal educational credential
53-3032	Heavy and Tractor-Trailer Truck Drivers	64	1.3%	\$23.59	Postsecondary nondegree award
11-3051	Industrial Production Managers	63	1.2%	\$54.32	Bachelor's degree
53-7051	Industrial Truck and Tractor Operators	62	1.2%	\$18.73	No formal educational credential
43-9061	Office Clerks, General	61	1.2%	\$16.24	High school or equivalent
43-3031	Bookkeeping, Accounting, and Auditing Clerks	55	1.1%	\$19.86	Some college, no degree

Source: Lightcast

- Miscellaneous Assemblers and Fabricators as well as Packaging and Filling Machine Operators are the two largest manufacturing occupations in Chenango County, accounting for a combined 13% of the manufacturing workforce.

- 19 of the top 25 manufacturing occupations in Chenango County require a High School diploma or less. Exceptions that require higher educational credentials include engineers, managers, heavy and tractor-trailer truck drivers, and bookkeeping clerks.

- Meanwhile, approximately half of the top 25 manufacturing occupations offer median hourly earnings greater than the county average (\$20.62). Occupations with the highest median earnings are Industrial Production Managers, Mechanical Engineers, Industrial Engineers, and General Managers.

This data reflects **occupations**, which are categorized based on an individual's specific job role or position, regardless of the industry in which they work.

Agriculture Profile

Total and Per Farm Overview, 2022 and change since 2017

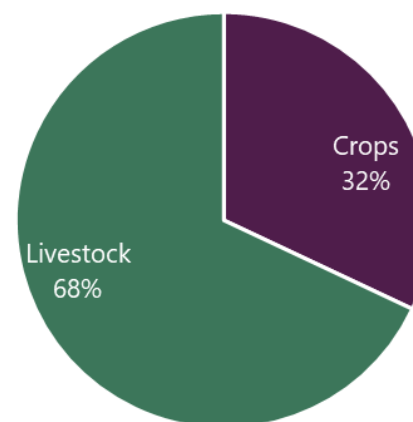
	2022	% change since 2017
Number of farms	656	-15
Land in farms (acres)	151,105	+1
Average size of farm (acres)	230	+19
Total	(\$)	
Market value of products sold	122,993,000	+81
Government payments	600,000	+11
Farm-related income	3,147,000	-1
Total farm production expenses	75,191,000	+61
Net cash farm income	51,549,000	+106
Per farm average	(\$)	
Market value of products sold	187,489	+113
Government payments ^a	6,247	+84
Farm-related income ^a	12,950	+27
Total farm production expenses	114,620	+89
Net cash farm income	78,581	+142

Source: 2022 Census of Agriculture

Despite a declining number of farms in Chenango County, total farming land area, value of sales, and farm income have all increased from 2017 to 2022.

- There were 656 farms in Chenango County in 2022, 15% fewer than five years prior. Data from the 2022 Census of Agriculture suggests that this decrease in the number of farms is likely due to consolidation because the size of farms has increased over the last five years. The census documented that the increase in the average size of farms from 2017-2022 was 19%.
- Approximately two-thirds of the county's agriculture sales are from livestock, while the remaining third is from crops.

Share of Sales in Chenango County, 2022

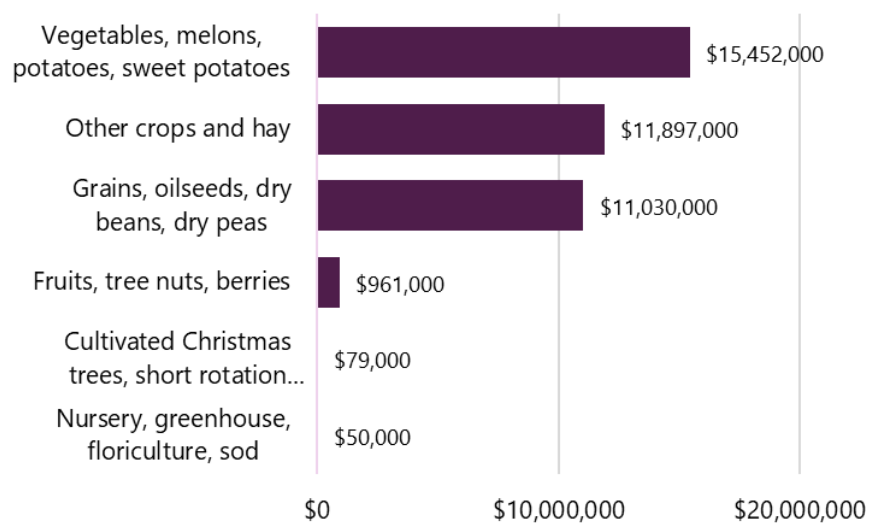


Source: 2022 Census of Agriculture

Dairy is by far Chenango County’s highest-value agriculture product.

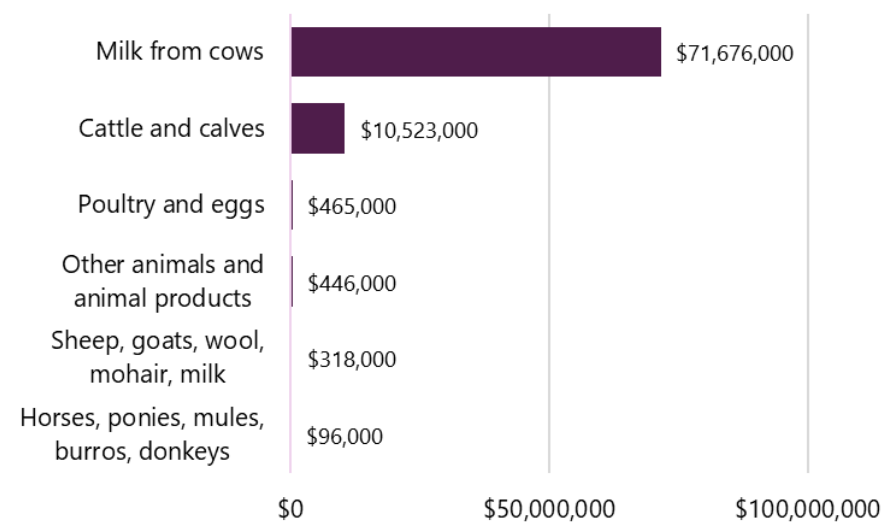
- In 2022, Chenango County dairy farmers had sales of over \$71.6 million, accounting for 58% of the total value of agricultural products sold by Chenango County farmers that year.
- Other key agricultural products in Chenango County include vegetables, melons, and potatoes; other crops and hay; grains; oilseeds; dry beans and peas; and cattle.

Total Market Value of Crops Sold, Chenango County (2022)



Source: 2022 Census of Agriculture

Total Market Value of Livestock, Poultry, and Animal Products Sold, Chenango County (2022)

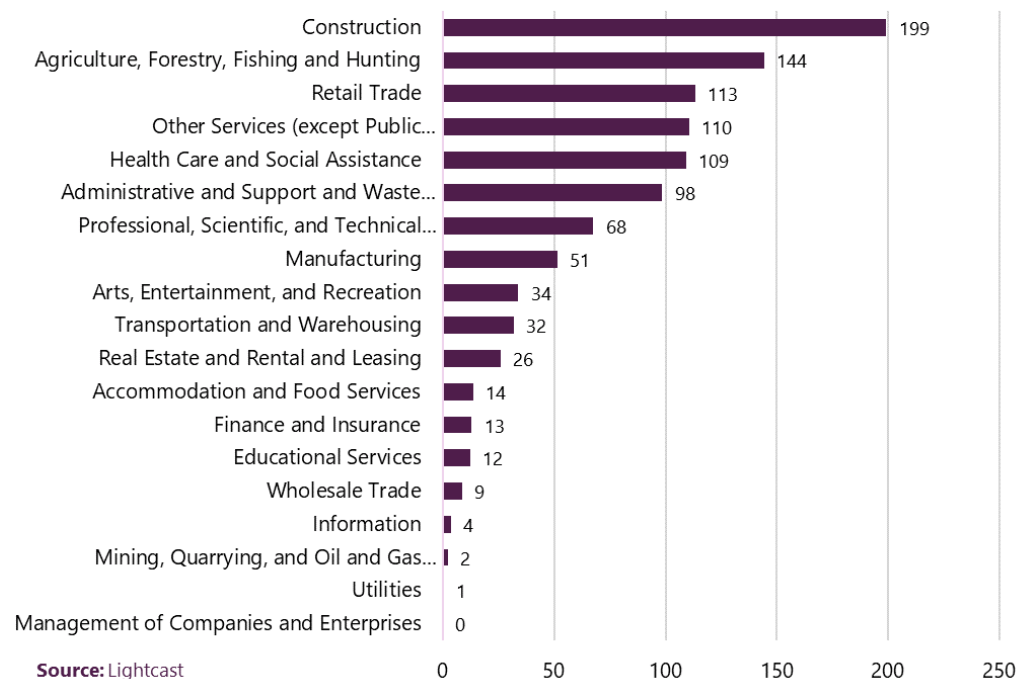


Source: 2022 Census of Agriculture

ENTREPRENEURS AND BUSINESS STARTUPS

Self-Employment Trends

2023 Self-Employment Jobs by Industry in Chenango County



6% of Chenango County's total employment is represented by self-employed workers, accounting for 1,039 jobs in 2023.

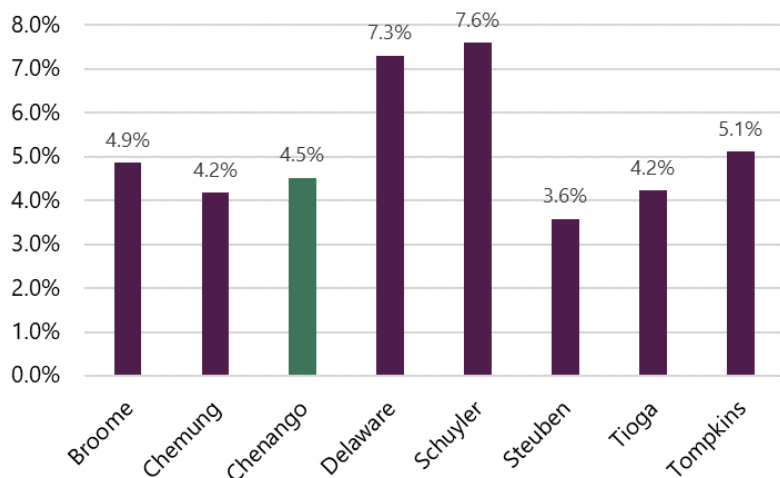
- Construction and Agriculture, Forestry, Fishing, and Hunting jobs account for the greatest number of self-employed workers in 2023.
- Overall, the number of self-employed workers throughout the county has declined by 3% from 5 years prior, driven by declines in Other Services, Construction, and Arts, Entertainment, and Recreation.
- Self-employment declines in some sectors were partially offset by growth in others, primarily Agriculture, Forestry, Fishing, and Hunting.
- Overall, Chenango County has a similar share of self-employed workers as the United States (7%).

Startup Activity

Startup activity in Chenango County has been on a slightly downward trend over the last two decades but is overall on par with most other counties in the Southern Tier.

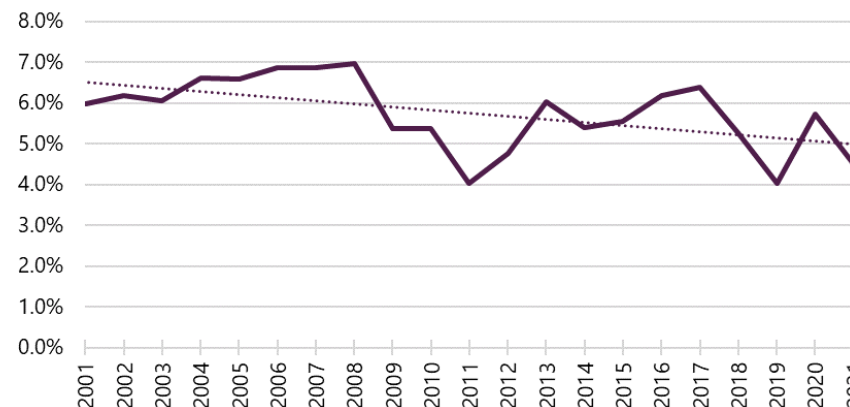
- As of 2021, about 4.5% of all businesses in Chenango County were less than a year old. Chenango County performs similarly to other Southern Tier Counties in this regard – other than Delaware and Schuyler Counties, the Southern Tier counties have startup rates that generally fall between 3.5%-5%.
- The share of first-year startups in Chenango County has declined since 2001 when around 6% of businesses fell into this category. The rate of startups in the county had a strong growth trajectory through 2008 when the Great Recession spurred a significant drop in startup activity. Startup activity declined in 2019 and was more volatile in 2020 and 2021.

Firms <1 Year Old as a Share of Total, 2021



Source: US Census Bureau Business Dynamics Statistics

Firms <1 Year Old as a Share of Total in Chenango County, 2001-2021



Source: US Census Bureau Business Dynamics Statistics

Establishment Entry, Exit, and Churn

The rate at which businesses are created in Chenango County is higher than the rate at which businesses close. It also has the lowest business exit rate in the Southern Tier.

- Chenango County’s business entry rate falls around the middle of the pack compared to other Southern Tier counties, at 7.4%. However, it does have the lowest business exit rate among all eight counties.
- Construction, Retail Trade, and Accommodation and Food Services have the strongest establishment churn rates, with significantly higher entry rates than exit rates. Conversely, Health Care and Social Assistance, Manufacturing, and Real Estate have significantly higher exit rates than entry rates.

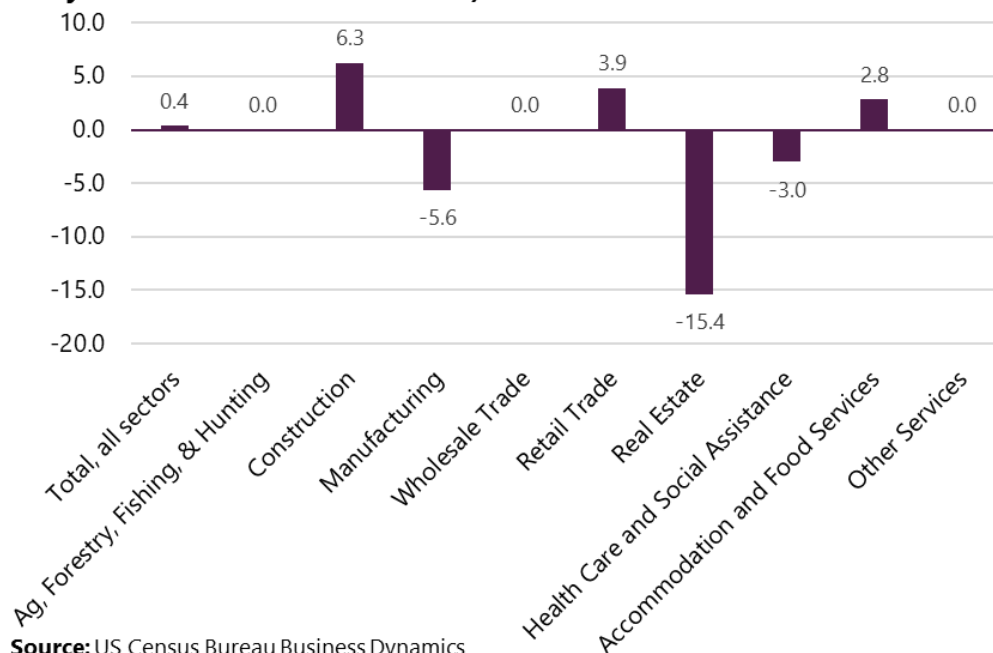
Definitions

Business Entry Rate – Businesses that form

Business Exit Rate – Businesses that close

Churn rate - The churn rate is the ratio of entries to exits to all business establishments.

Business Churn Rate in Chenango County by Sector (Business Entry Rate minus Business Exit Rate)



Source: US Census Bureau Business Dynamics

Establishment Entry, Exit, and Churn (2021)

County	Entry Rate	Exit Rate	Churn Rate
Schuyler	12.2	10.0	2.2
Delaware	9.7	9.0	0.7
Chenango	7.4	7.0	0.4
Steuben	6.3	7.4	(1.1)
Broome	6.8	9.3	(2.5)
Chemung	6.0	9.5	(3.5)
Tompkins	7.7	11.4	(3.7)
Tioga	5.1	11.6	(6.5)

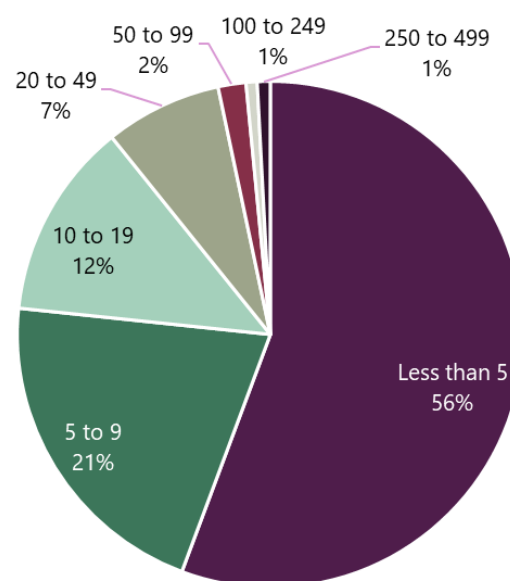
Source: US Census Bureau Business Dynamics Statistics

Small Businesses

Chenango County's economy is largely made up of small businesses. 98% of businesses have fewer than 100 employees.

- Over half of all businesses in the county have fewer than five employees, representing about 470 total businesses.
- Overall, only 2% of all businesses have more than 100 employees, pointing to the significance of small businesses in the county's economy.

**Businesses by Size of Firm in Chenango County, 2021
Distribution**



Source: US Census Bureau, County Business Patterns

ATTACHMENT A: DATA SOURCES



Lightcast (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. [Click to learn more.](#)



Esri ArcGIS Business Analyst combines proprietary statistical models covering demographic, business, and spending data with map-based analytics to offer insights on market opportunities for industries, businesses, and sites. Business Analyst integrates datasets covering a wide range of topics including demographics, consumer spending, market potential, customer segmentation, business locations, traffic counts, and crime indexes, which can be overlaid spatially to produce customizable maps and uncover market intelligence. Data can be pulled for standard and custom geographies, allowing for valuable comparison between places. [Click to learn more.](#)



The **American Community Survey (ACS)** is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. Mandatory to fill out, the survey is sent to a small sample of the population on a rotating basis. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. [Click to learn more.](#)



The **Census of Agriculture** provides a detailed picture of US farms and ranches and the people who operate them. It provides uniform, comprehensive agricultural data for every state and county in the US on topics including agricultural land, animal and crop production, employment, worker demographics, farm business operations, and the environment. It is conducted by the US Department of Agriculture (USDA) every five years, in years ending in 2 and 7. [Click to learn more.](#)

Business Dynamics Statistics | US Census Bureau

The **Business Dynamics Statistics (BDS)** program provides annual measures of business dynamics—such as job creation and destruction, establishment births and deaths, and firm startups and shutdowns—for the economy and aggregated by establishment and firm characteristics. It covers the entire US economy and is available at the national, state, and MSA (metropolitan statistical area) levels. [Click to learn more.](#)

OnTheMap | US Census Bureau



OnTheMap is a tool developed through the US Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. It offers visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex.

