

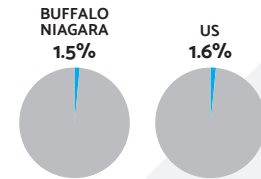
TARGET INDUSTRY

Agribusiness



With just under 10,000 workers across 238 firms, Agribusiness remains the region's smallest target industry. Yet, it continues to leverage one of the region's largest natural assets: 1.3 million acres of farmland and nearly 7,000 farms. While industry employment as a share of the total regional economy dipped slightly since 2009, and is just under the national average, two of the three subsectors comprising the industry expanded between 2009 and 2014, together adding hundreds of new jobs. This represents double-digit job growth since 2009 for Agricultural, Machinery & Chemical and Agribusiness Support Activities. While 660 jobs were cut in Food & Beverage Production between 2009 and 2014, the number of firms in this subsector remained unchanged.

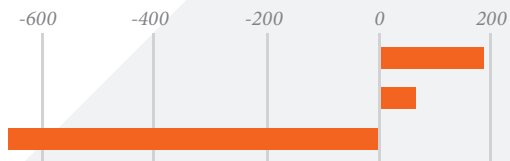
Industry employment as a share of total economy in...



FIRMS AND EMPLOYEES BY INDUSTRY SUBSECTOR

SUBSECTOR	# OF FIRMS	# OF EMPLOYEES
Agricultural, Machinery & Chemical	12	816
Agribusiness Support Activities	28	353
Food & Beverage Production	198	8,624
TOTAL	238	9,793

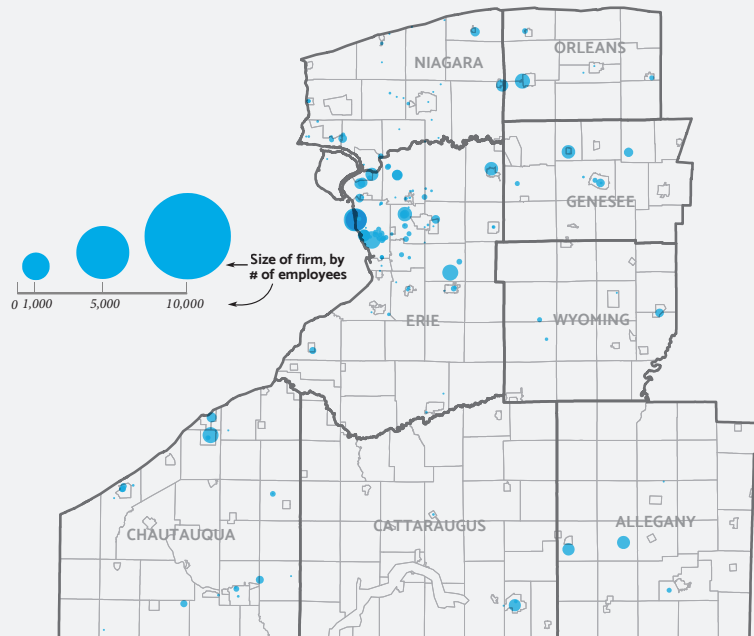
CHANGE IN # OF EMPLOYEES, 2009-14



Source: NYS DOL, Quarterly Census of Employment and Wages, 2009 and 2014. Farms and farmland acreage across Buffalo Niagara is from the USDA National Agriculture Statistics Service, 2012 Census of Agriculture.

AGRIBUSINESS FIRMS ACROSS THE REGION

While agriculture contributes to the backbone of the economy in many rural areas, many Agribusiness firms are located in northern Erie County.



Source: Reference USA, U.S. Businesses Database, 2016.

Workers in five out of 10 common jobs in Agribusiness earn more than \$40,000 per year, on average.

TOP 10 OCCUPATIONS IN AGRIBUSINESS

Packaging and Filling Machine Operators and Tenders	Operate or tend machines to prepare industrial or consumer products for storage or shipment
Food Batchmakers	Set up and operate equipment that mixes or blends ingredients used in the manufacturing of food products
Food Cooking Machine Operators and Tenders	Operate or tend cooking equipment, such as steam cooking vats, deep fry cookers, pressure cookers, kettles, and boilers, to prepare food products
Industrial Truck and Tractor Operators	Operate industrial trucks or tractors equipped to move materials around a warehouse, storage yard, factory, construction site, or similar location
First-Line Supervisors of Production and Operating Workers	Directly supervise and coordinate the activities of production and operating workers
Packers and Packagers, Hand	Pack or package by hand a wide variety of products and materials
Team Assemblers	Work as part of a team having responsibility for assembling an entire product or component of a product
Industrial Machinery Mechanics	Repair, install, adjust, or maintain industrial production and processing machinery or refinery and pipeline distribution systems
Bakers	Mix and bake ingredients to produce breads, rolls, cookies, cakes, pies, pastries, or other baked goods
Laborers and Freight, Stock, and Material Movers, Hand	Manually move freight, stock, or other materials or perform other general labor

Wage Range for Top 10 Occupations

Target Industry Avg. \$47,105

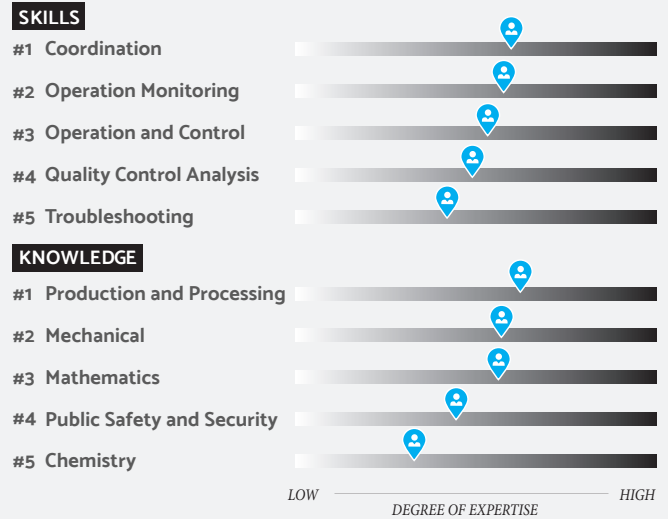


Source: NYS DOL, Quarterly Census of Employment and Wages, 2014; NYS DOL, Occupational Employment Statistics, 8-county roll-up (Q1), 2015; NYS DOL, Staffing Patterns, 2014; O*Net 20.2 Database, 2015.

Training that develops areas of expertise beyond the average worker will support growth of Agribusiness.

TOP 5 SPECIALIZED SKILLS AND KNOWLEDGE IN AGRIBUSINESS

Level of expertise for top 5 specialized skills and knowledge areas for this target industry



Source: O*NET 20.2 Database, "Skills by Occupation" and "Knowledge by Occupation", 2015; NYS DOL, Occupational Employment Statistics, 8-county roll-up (Q1), 2015.

Thousands of graduates earned Agribusiness-related degrees in 2014.

AGRIBUSINESS-RELATED DEGREES GRANTED IN BUFFALO NIAGARA

	Associate's	Bachelor's	Master's	Doctoral/ Professional	TOTAL '13-'14
<i>Business, management, marketing, and related support services</i>	871	2,497	968	9	4,345
<i>Construction Trades</i>	156	0	0	0	156
<i>Personal and culinary services</i>	134	0	0	0	134
<i>Agriculture, agriculture operations, and related sciences</i>	45	4	0	0	49

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System, 2014.