



Bureau of Labor Market Information Division of Research and Statistics



Significant Industries

A Report to the Workforce Development System

Southern Tier | 2015

Preface

One of the major objectives of the workforce development system is to encourage local workforce investment boards (LWIBs) to plan strategically and focus their resources on priority industries (and eventually on priority occupations within those industries).

To assist in this effort the New York State Department of Labor's Division of Research and Statistics decided to concentrate this report on industries identified as "significant industries." Industries presented here are classified according to their North American Industry Classification System (NAICS) code.

This report lists significant industries in the Southern Tier Region based on various criteria. Local workforce investment boards should concentrate their workforce development resources on these particular industries.

Significant industries were identified on the basis of job counts, wage levels, job growth (both net and percent) over the 2009-2014 period, and expected job growth based on industry employment projections through 2022. Priority industries that may have been designated by economic development or workforce development officials were also considered.

Regional Industries

Eleven regional industries are designated as "significant" in this report. Seven of these industries increased their regional employment levels between 2009 and 2014. In addition, six of these eleven industries employed at least 8,000 during 2014.

Finally, all "significant industries" shared one or more of the following characteristics: rapid growth (percentage basis); large growth (absolute basis); high wages (average annual wage above the regional average of \$43,700 in 2014); or strong expected growth through 2022. The specific reason(s) why each industry was designated as "significant" are presented in the last column of the first table.

A broad-based set of industries were identified for this report. They fall into six major industry groups: construction; manufacturing; transportation and warehousing; professional and business services (which primarily sell to other businesses); educational services; and health care.

Industry Analysis

In the following analysis, industries are presented in ascending NAICS industry code order. For additional information regarding the NAICS industry classification system, visit <http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2012>.

Construction

Skilled trade occupations comprise much of the employment within the *construction of buildings* (NAICS Industry 236) industry category. The region's job growth rate in this industry category (11.1%) bested all but one of the other nine labor market regions throughout the state

over the 2009-2014 time period. Looking ahead over the next decade, the impending retirement of many baby boomers will contribute to job opportunities in this industry, especially among the skilled trades.

Manufacturing

The region's *food manufacturing* (NAICS Industry 311) industry charted a notable 900-job gain between 2009-2014. This represents an advance of 36 percent which led all regions. Employment gains are anticipated between 2012 and 2022. The average annual wage (\$47,600) was more than the all- industry average annual wage (\$43,700) in 2014.

Machinery manufacturing (NAICS Industry 333) experienced employment growth of 10.3 percent (400 jobs) between 2009-2014. This rate of growth was second among the ten labor market regions in the state. Industry highlights also include above average annual wages (\$60,500).

Although *computer and electronic product manufacturing* (NAICS Industry 334) lost jobs from 2009 to 2014, it still provides a relatively large number (12,300) of high-paying jobs throughout the Southern Tier Region. The average annual wage (\$86,000) was nearly double the all-industry average annual wage (\$43,700) in 2014. The most common occupations in the industry include assemblers, inspectors, testers, and engineers.

Transportation and Warehousing

Warehousing and storage (NAICS Industry 493) is part of the broader transportation and warehousing sector. The number of jobs within this sector represents a relatively small amount of total employment regionally, but the breakneck growth rate (150%; 600 jobs) and favorable job outlook deepen this sector's regional imprint.

Professional and Business Services

There are two industries from the professional and business services sector on the significant industries list. They are *professional, scientific, and technical services* (NAICS Industry 541) and *management of companies and enterprises* (NAICS Industry 551). They both share one common trait; they tend to sell to other businesses rather than consumers.

Both industries gained jobs between 2009 and 2014. Their workforce counts are expected to continue to expand in the coming years. *Professional, scientific, and technical services* (\$71,700) and *management of companies and enterprises* (\$117,700) both pay above-average annual wages.

Educational Services

With more than 42,000 jobs between the public and private sectors, *educational services* (NAICS Industry 611), has, by far, the most employment of any "significant industry". This sector shed jobs (-9.9%) between 2009 and 2014. The industry's 2014 average annual wage (\$48,700) was just above the all-industry annual average. Leading job titles include teacher assistant, elementary school teacher, and secondary school teacher.

Growth in *educational services* is driven more by demographics than by economic conditions; however, since 2010, many local school districts throughout New York State have faced severe budget pressures. Many may need to reduce or, at the very least, hold overall staff levels steady as these pressures remain. Most job opportunities will likely lie in the replacement of retiring baby boomers within the industry.

Health Care and Social Assistance

Growth in health care industry employment is, like educational services, also driven more by demographics than by overall economic conditions. Almost all health care occupations are expected to be in demand over the next decade as New York State's population continues to age. The health care sector consists of three main components:

- *Ambulatory health care services* (NAICS Industry 621)
- *Hospitals* (NAICS Industry 622)
- *Nursing and residential care facilities* (NAICS Industry 623)

Of these, *hospitals* was the only sector to add jobs between 2009 and 2014. Cumulatively, these three industries employed over 33,000 which represent nearly 13 percent of all Southern Tier Region jobs in 2014.

Ambulatory health care services (\$59,300) and *hospitals* (\$49,200) have wage levels above the all- industry annual average. Annual average wage levels at *nursing and residential care facilities* (\$32,500) in 2009 were below the statewide annual average (\$43,700). This is largely a reflection of the mix of occupations in each health care industry. In *nursing and residential care facilities*, for example, the three most common occupations are relatively low-paying. They include nursing assistant, home health aide, and personal care aide.

For Further Information

It is hoped that the statewide and local workforce investment boards find the information in this report useful. The New York State Department of Labor's regional labor market analyst for the Southern Tier, Christian Harris, is available for consultation. He can be reached via email at Christian.Harris@labor.ny.gov or by phone at (607) 741-4485.

The statewide report entitled "Significant Industries in New York: A Report to the Workforce Development System" may be found at <http://www.labor.ny.gov/stats/Significant-Industries.shtm>.

Significant Industries, Southern Tier Region, 2015

NAICS Industry Code	Industry Name	Job Count		Net Change in Jobs, 2009-2014	% Change in Jobs, 2009-2014	Average Annual Wage, 2014	Projected % Change in Jobs, 2012-2022	Why Industry is Significant**
		2009*	2014*					
	Total, all industries (all ownerships)	266,000	260,200	-5,800	-2.2%	\$43,700	5.5%	NA
236	Construction of buildings	1,800	2,000	200	11.1%	\$42,700	11.3%	G, P
311	Food manufacturing	2,500	3,400	900	36.0%	\$47,600	12.5%	G, P, W
333	Machinery manufacturing	3,900	4,300	400	10.3%	\$60,500	-3.3%	G, W
334	Computer and electronic product manufacturing	12,300	8,400	-3,900	-31.7%	\$86,000	-4.7%	J, W
493	Warehousing and storage	400	1,000	600	150.0%	\$38,100	15.1%	G, P
541	Professional and technical services	9,700	9,800	100	1.0%	\$71,700	11.7%	G, J, P, W
551	Management of companies and enterprises	1,900	2,500	600	31.6%	\$117,700	15.8%	G, P, W
611	Educational services	46,700	42,100	-4,600	-9.9%	\$48,700	6.0%	J, P, W
621	Ambulatory health care services	8,600	8,600	0	0.0%	\$59,300	17.5%	G, J, P, W
622	Hospitals	12,900	13,400	500	3.9%	\$49,200	4.2%	G, J, W
623	Nursing and residential care facilities	12,100	11,600	-500	-4.1%	\$32,500	21.2%	J, P

NA – Not Applicable

*Represents both private and public sector jobs

****Key:**

G: Industry experienced above-average job growth; can be net or percentage growth.

J: Industry employs a significant number of jobs (>8,000).

P: Above-average growth projected for 2012-2022.

W: Industry pays above-average wages.

Construction of Buildings

(NAICS Industry 236)

Industry Description: The Construction of Buildings subsector comprises establishments primarily responsible for the construction of buildings. The work performed may include new work, additions, alterations, or maintenance and repairs. The on-site assembly of precut, panelized, and prefabricated buildings and construction of temporary buildings are included in this subsector. Part or all of the production work for which the establishments in this subsector have responsibility may be subcontracted to other construction establishments—usually specialty trade contractors.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	47-2031	Carpenters	41.2%	\$41,240	11.7%
2	47-2061	Construction Laborers	16.1%	\$30,210	9.0%
3	47-1011	First-Line Supervisors of Construction Trades and Extraction Work	6.0%	\$69,810	8.8%
4	11-1021	General and Operations Managers	5.5%	\$61,190	7.1%
5	11-9021	Construction Managers	3.5%	\$76,630	9.3%
6	43-3031	Bookkeeping, Accounting, and Auditing Clerks	3.0%	\$33,810	8.5%
7	43-9061	Office Clerks, General	3.0%	\$19,510	-0.1%
8	13-1051	Cost Estimators	2.5%	\$60,550	14.7%
9	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2.5%	\$44,570	7.2%
10	47-3012	Helpers--Carpenters	2.0%	\$26,420	11.1%

Food Manufacturing

(NAICS Industry 311)

Industry Description: Industries in the Food Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-9111	Packaging and Filling Machine Operators and Tenders	25.3%	\$30,320	6.8%
2	53-7051	Industrial Truck and Tractor Operators	7.6%	\$37,450	-2.8%
3	51-3093	Food Cooking Machine Operators and Tenders	5.4%	\$36,830	10.7%
4	51-1011	First-Line Supervisors of Production and Operating Workers	5.2%	\$67,560	-1.3%
5	51-3092	Food Batchmakers	4.3%	\$34,570	8.3%
6	51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	3.5%	\$37,430	12.0%
7	49-9041	Industrial Machinery Mechanics	3.3%	\$53,090	17.1%
8	49-9071	Maintenance and Repair Workers, General	3.0%	\$40,650	7.5%
9	53-7061	Cleaners of Vehicles and Equipment	3.0%	\$33,580	7.9%
10	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	1.9%	\$37,700	2.0%

Machinery Manufacturing

(NAICS Industry 333)

Industry Description: Industries in the Machinery Manufacturing subsector create end products that apply mechanical force, for example, the application of gears and levers, to perform work. Some important processes for the manufacture of machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal. Processes, such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. Moreover, complex assembly operations are an inherent part of the production process.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2092	Team Assemblers	16.7%	\$42,140	0.7%
2	51-4041	Machinists	4.9%	\$38,420	5.7%
3	17-2141	Mechanical Engineers	4.4%	\$72,490	0.0%
4	43-5081	Stock Clerks and Order Fillers	3.6%	\$29,010	-5.9%
5	51-1011	First-Line Supervisors of Production and Operating Workers	3.6%	\$67,080	-1.3%
6	17-2112	Industrial Engineers	3.1%	\$72,240	2.5%
7	51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	2.3%	\$36,770	-15.4%
8	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	2.3%	\$44,600	2.0%
9	13-1023	Purchasing Agents, Except Wholesale, Retail, and Farm Products	1.8%	\$62,050	-1.5%
10	41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	1.8%	\$65,650	3.2%

Computer and Electronic Product Manufacturing (NAICS Industry 334)

Industry Description: Firms in this industry group manufacture computers, computer peripherals, communications equipment, and similar electronic products. This group also includes establishments that manufacture components for these products.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2022	Electrical and Electronic Equipment Assemblers	9.1%	\$29,390	-3.9%
2	17-2071	Electrical Engineers	5.3%	\$92,170	1.6%
3	15-1133	Software Developers, Systems Software	5.0%	\$112,010	5.5%
4	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	4.8%	\$35,120	2.0%
5	17-2072	Electronics Engineers, Except Computer	3.6%	\$103,390	0.0%
6	51-2092	Team Assemblers	3.0%	\$27,850	0.7%
7	17-2141	Mechanical Engineers	2.4%	\$90,020	0.0%
8	51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	2.4%	\$36,670	13.0%
9	51-9141	Semiconductor Processors	2.4%	\$33,470	NA
10	51-4041	Machinists	2.3%	\$31,360	5.7%

NA – Not Available

Warehousing and Storage

(NAICS Industry 493)

Industry Description: Industries in the Warehousing and Storage subsector are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods. They do not sell the goods they handle. These establishments take responsibility for storing the goods and keeping them secure. They may also provide a range of services, often referred to as logistics services, related to the distribution of goods. Logistics services can include labeling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing, and transportation arrangement. However, establishments in this industry group always provide warehousing or storage services in addition to any logistic services. Furthermore, the warehousing or storage of goods must be more than incidental to the performance of services, such as price marking.

Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	53-7051	Industrial Truck and Tractor Operators	20.2%	\$28,900	-2.8%
2	53-7062	Laborers and Freight, Stock, and Material Movers, Hand	19.0%	\$29,930	4.5%
3	43-5071	Shipping, Receiving, and Traffic Clerks	11.9%	\$24,440	-0.9%
4	53-1031	First-Line Supervisors of Transportation and Material-Moving Mach	3.6%	\$58,450	7.7%
5	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1.2%	\$37,580	7.2%

Professional, Scientific, and Technical Services (NAICS Industry 541)

Industry Description: Establishments in this industry are engaged in processes where “human capital” is the major input. Firms make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. The distinguishing feature of this industry group is firms within it are almost wholly dependent on worker skills. Thus, firms here are selling expertise. Examples include legal, accounting, architectural, advertising, scientific R&D, and other professional services.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4.3%	\$38,600	7.2%
2	43-9061	Office Clerks, General	3.5%	\$22,800	-0.1%
3	23-2011	Paralegals and Legal Assistants	3.3%	\$39,020	3.2%
4	17-2141	Mechanical Engineers	3.2%	\$89,320	0.0%
5	13-2011	Accountants and Auditors	3.0%	\$57,610	6.8%
6	43-3031	Bookkeeping, Accounting, and Auditing Clerks	2.4%	\$38,500	8.5%
7	43-6012	Legal Secretaries	2.3%	\$33,420	-13.9%
8	43-4171	Receptionists and Information Clerks	2.2%	\$23,730	7.0%
9	11-1021	General and Operations Managers	2.0%	\$113,660	7.1%
10	23-1011	Lawyers	2.0%	\$76,990	1.1%

Management of Companies and Enterprises

(NAICS Industry 551)

Industry Description: This industry group includes three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision-making role of the company or enterprise.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	43-3031	Bookkeeping, Accounting, and Auditing Clerks	5.5%	\$36,070	8.5%
2	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4.7%	\$38,170	7.2%
3	11-1021	General and Operations Managers	4.3%	\$110,380	7.1%
4	43-3021	Billing and Posting Clerks and Machine Operators	4.0%	\$30,840	12.0%
5	43-9061	Office Clerks, General	4.0%	\$28,300	-0.1%
6	43-4051	Customer Service Representatives	3.6%	\$39,900	1.9%
7	43-6011	Executive Secretaries and Executive Administrative Assistants	3.6%	\$60,090	-6.7%
8	49-9071	Maintenance and Repair Workers, General	3.2%	\$42,150	7.5%
9	13-2011	Accountants and Auditors	2.8%	\$65,320	6.8%
10	43-1011	First-Line Supervisors of Office and Administrative Support Workers	2.8%	\$54,090	5.8%

Educational Services

(NAICS Industry 611)

Industry Description: Establishments in this industry provide instruction and training in a wide variety of subjects. The instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	25-9041	Teacher Assistants	7.7%	\$21,920	3.6%
2	25-3098	Substitute Teachers	6.6%	\$29,040	1.1%
3	25-2031	Secondary School Teachers, Except Special and Career/Technical Ed	6.1%	\$59,930	1.1%
4	25-2021	Elementary School Teachers, Except Special Education	5.5%	\$56,200	1.1%
5	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical,	4.8%	\$44,870	7.2%
6	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	4.6%	\$30,090	7.9%
7	25-2022	Middle School Teachers, Except Special and Career/Technical Education	3.1%	\$56,480	1.5%
8	43-9061	Office Clerks, General	2.0%	\$34,530	-0.1%
9	21-1012	Educational, Guidance, School, and Vocational Counselors	1.7%	\$62,300	7.6%
10	25-9031	Instructional Coordinators	1.6%	\$66,310	10.0%

Ambulatory Health Care Services

(NAICS Industry 621)

Industry Description: Ambulatory Health Care Services establishments provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. Health practitioners in this industry provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	43-4171	Receptionists and Information Clerks	14.3%	\$27,160	7.0%
2	29-1141	Registered Nurses	8.4%	\$58,940	7.5%
3	31-9092	Medical Assistants	5.6%	\$29,500	18.5%
4	29-2061	Licensed Practical and Licensed Vocational Nurses	5.0%	\$36,010	11.7%
5	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4.8%	\$27,300	7.2%
6	31-1011	Home Health Aides	4.3%	\$21,650	24.9%
7	31-9091	Dental Assistants	4.3%	\$31,880	6.1%
8	29-2041	Emergency Medical Technicians and Paramedics	3.7%	\$31,690	18.8%
9	29-1069	Physicians and Surgeons, All Other	3.5%	\$197,110	13.4%
10	29-2021	Dental Hygienists	3.5%	\$58,300	9.3%

Hospitals

(NAICS Industry 622)

Industry Description: Hospitals provide medical, diagnostic, and treatment services that include physician, nursing, and other health services to inpatients and the specialized accommodation services required by inpatients. Hospitals may also provide outpatient services as a secondary activity.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	29-1141	Registered Nurses	23.3%	\$62,400	7.5%
2	31-1014	Nursing Assistants	8.4%	\$28,520	10.2%
3	29-1069	Physicians and Surgeons, All Other	4.7%	\$197,100	13.4%
4	43-9061	Office Clerks, General	3.8%	\$26,410	-0.1%
5	11-9111	Medical and Health Services Managers	3.1%	\$78,690	8.2%
6	29-2061	Licensed Practical and Licensed Vocational Nurses	2.3%	\$35,230	11.7%
7	29-2041	Emergency Medical Technicians and Paramedics	2.2%	\$30,130	18.8%
8	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2.2%	\$22,170	7.9%
9	43-4111	Interviewers, Except Eligibility and Loan	2.2%	\$33,740	0.0%
10	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1.9%	\$31,060	7.2%

Nursing and Residential Care Facilities

(NAICS Industry 623)

Industry Description: Nursing and Residential Care Facilities provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. Here, the facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	31-1014	Nursing Assistants	17.6%	\$25,260	10.2%
2	31-1011	Home Health Aides	13.6%	\$23,290	24.9%
3	39-9021	Personal Care Aides	9.6%	\$22,880	23.3%
4	29-2061	Licensed Practical and Licensed Vocational Nurses	7.6%	\$37,690	11.7%
5	29-1141	Registered Nurses	5.2%	\$54,920	7.5%
6	37-2012	Maids and Housekeeping Cleaners	4.8%	\$19,740	8.7%
7	35-3041	Food Servers, Nonrestaurant	4.2%	\$18,900	21.4%
8	39-9011	Childcare Workers	3.4%	\$22,420	10.8%
9	39-1021	First-Line Supervisors of Personal Service Workers	2.4%	\$40,980	14.3%
10	39-9032	Recreation Workers	2.2%	\$23,030	15.3%

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