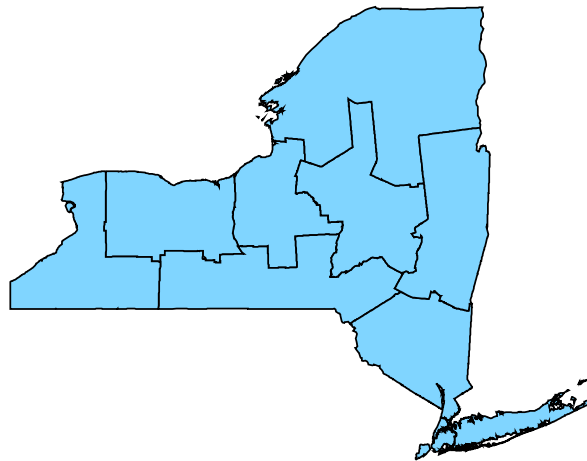


New York State's Food Manufacturing Industry: A Statewide and Regional Analysis



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**New York State Department of Labor
Division of Research and Statistics
Bureau of Labor Market Information**

Peter M. Rivera, Commissioner

Andrew M. Cuomo, Governor

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Introduction

Industry Definition and Composition

According to the North American Industry Classification System (NAICS), the food manufacturing subsector has the following attributes:

- The food manufacturing subsector is part of the manufacturing sector.
- 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.
- Establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.

Under the NAICS classification scheme, the food manufacturing subsector is assigned NAICS industry code 311. Food manufacturing is comprised of these nine principal component industries:

- Animal Food Manufacturing (NAICS 3111)
- Grain and Oilseed Milling (NAICS 3112)
- Sugar and Confectionery Product Manufacturing (NAICS 3113)
- Fruit and Vegetable Preserving and Specialty Food Manufacturing (NAICS 3114)
- Dairy Product Manufacturing (NAICS 3115)
- Animal Slaughtering and Processing (NAICS 3116)
- Seafood Product Preparation and Packaging (NAICS 3117)
- Bakeries and Tortilla Manufacturing (NAICS 3118)
- Other Food Manufacturing (NAICS 3119) – representative examples include snack foods, coffee and tea, and dressings and seasonings.

Data Sources

All industry employment and wage data presented in this analysis are from the Quarterly Census of Employment and Wages (QCEW). Data from this program are based on quarterly reports submitted by employers covered under New York State's Unemployment Insurance (UI) law. QCEW data are available for downloading at: labor.ny.gov/stats/LSQCEW.shtm

Additional occupational employment and wage data presented in this report come from the New York State Department of Labor's Occupational Employment Statistics (OES) survey. This program collects information from approximately 52,000 businesses in New York State. Data were collected in 2009, 2010, 2011 and 2012 and then updated to the first quarter of 2013 by making cost-of-living adjustments. OES employment and wage data are available for downloading at: labor.ny.gov/stats/lswage2.asp

Quarterly Workforce Indicators (QWI) data are from the U.S. Census Bureau. These data combine administrative data from the UI and QCEW programs with additional administrative data and data from censuses and surveys. From these data, the program creates statistics on employment, earnings, and job flows at detailed levels of geography and industry and for different demographic groups. Additional QWI reports for New York State are available at: lehd.ces.census.gov/applications/qwi_online/

For Further Information

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Employment and Wage Trends in Food Manufacturing (NAICS 311), New York State, 2003-2013

Year	Number of Firms	Jobs	Total Wages (\$ billions)	Annual Average Wages
2003	1,953	53,155	\$1.85	\$34,868
2004	1,976	51,932	\$1.85	\$35,615
2005	1,956	50,634	\$1.84	\$36,311
2006	1,950	50,585	\$1.88	\$37,078
2007	2,035	50,824	\$1.94	\$38,080
2008	2,066	49,941	\$1.96	\$39,302
2009	2,067	48,301	\$1.91	\$39,631
2010	2,119	49,061	\$1.98	\$40,335
2011	2,169	49,709	\$1.99	\$40,022
2012	2,251	51,561	\$2.10	\$40,790
2013	2,268	52,345	\$2.17	\$41,448
% Change, 2003-2013	16.1%	-1.5%	17.1%	18.9%

- The number of firms in food manufacturing grew by more than 16% in 2003-2013. In contrast, the number of firms in the state’s overall manufacturing sector fell by about 15% over the same period
- From 2003 to 2013, employment in the state’s food manufacturing sector declined by 1.5%.
- In 2013, the annual average wage in food manufacturing was \$41,448, which was 32% lower than the state’s overall manufacturing wage (\$61,240).

Component Industries in Food Manufacturing (NAICS 311), New York State, 2013

Industry Name (NAICS code)	Number of Firms	Jobs	Total Wages (\$ millions)	Annual Average Wages
Animal food manufacturing (3111)	58	1,498	\$85.5	\$57,085
Grain and oilseed milling (3112)	22	969	\$64.6	\$66,625
Sugar and confectionery product manufacturing (3113)	118	2,788	\$115.9	\$41,556
Fruit and vegetable preserving and specialty foods (3114)	103	5,822	\$272.4	\$46,782
Dairy product manufacturing (3115)	121	9,474	\$513.3	\$54,181
Animal slaughtering and processing (3116)	132	3,629	\$144.6	\$39,853
Seafood product preparation and packaging (3117)	19	408	\$29.3	\$71,823
Bakeries and tortilla manufacturing (3118)	1,514	21,315	\$615.6	\$28,882
Other food manufacturing (3119)	183	6,444	\$328.4	\$50,964

- In 2013, bakeries and tortilla manufacturing was by far the single largest industry in food manufacturing with 1,514 firms and 21,315 workers. It also paid the lowest average wage (\$28,882) in food manufacturing in 2013, which was 30% lower than the overall food manufacturing wage (\$41,448).
- Additional food manufacturing industries with at least 5,000 workers in 2013 include dairy product manufacturing (9,474), other food manufacturing (6,444) and fruit and vegetable preserving and specialty foods (5,822). (Note: Representative examples of “other food manufacturing” include snack foods, coffee and tea and dressings and seasonings.)
- In 2013, the two component industries with the highest average wages were seafood product preparation and packaging (\$71,823) and grain and oilseed milling (\$66,625). These industries also had the lowest employment levels in 2013.

Component Industries in Food Manufacturing (NAICS 311), New York State, 2013

Industry Name (NAICS code)	% Share of Food Manufacturing Firms in NYS	% Share of Food Manufacturing Jobs in NYS	% Share of Food Manufacturing Total Wages Paid in NYS	% of Average Wages Paid (Industry Average=100)
Animal food manufacturing (3111)	2.6%	2.9%	3.9%	137.7%
Grain and oilseed milling (3112)	1.0%	1.9%	3.0%	160.7%
Sugar and confectionery product manufacturing (3113)	5.2%	5.3%	5.3%	100.3%
Fruit and vegetable preserving and specialty foods (3114)	4.5%	11.1%	12.6%	112.9%
Dairy product manufacturing (3115)	5.3%	18.1%	23.7%	130.7%
Animal slaughtering and processing (3116)	5.8%	6.9%	6.7%	96.2%
Seafood product preparation and packaging (3117)	0.8%	0.8%	1.4%	173.3%
Bakeries and tortilla manufacturing (3118)	66.8%	40.7%	28.4%	69.7%
Other food manufacturing (3119)	8.1%	12.3%	15.1%	123.0%

- At 66.8%, bakeries and tortilla manufacturing accounted for about 2/3 of food manufacturers in the state. No other industry had more than 10% of industry firms.
- More than 2/5 of food manufacturing workers were in bakeries and tortilla manufacturing in 2013.
- Only three other industries had employment shares above 10% in 2013: dairy product manufacturing (18.1%), other food manufacturing (12.3%) and fruit and vegetable preserving and specialty foods (11.1%).
- Relative to the overall average wage in food manufacturing, industries with the highest average wages in 2013 were seafood product preparation and packaging (173.3%), grain and oilseed milling (160.7%) and animal food manufacturing (137.7%).
- Relative to the overall average wage in food manufacturing, the two component industries with the lowest average wages in 2013 were bakeries and tortilla manufacturing (69.7%) and animal slaughtering and processing (96.2%).

Trends in Component Industries in Food Manufacturing (NAICS 311), New York State, 2003-2013

Industry Name (NAICS code)	% Change in Firms	% Change in Jobs	% Change in Total Wages Paid	% Change in Average Wages Paid
Animal food manufacturing (3111)	0.0%	-15.8%	16.6%	38.6%
Grain and oilseed milling (3112)	22.2%	-2.6%	15.7%	18.8%
Sugar and confectionery product manufacturing (3113)	-12.6%	-31.9%	-16.2%	23.0%
Fruit and vegetable preserving and specialty foods (3114)	-4.6%	-25.0%	-11.0%	18.6%
Dairy product manufacturing (3115)	0.0%	12.0%	37.9%	23.0%
Animal slaughtering and processing (3116)	0.8%	-5.0%	10.5%	16.3%
Seafood product preparation and packaging (3117)	-9.5%	-12.6%	43.6%	64.4%
Bakeries and tortilla manufacturing (3118)	26.9%	8.7%	17.9%	8.4%
Other food manufacturing (3119)	7.6%	4.3%	40.3%	34.6%

- From 2003 to 2013, the number of firms increased in four of seven component industries, with the largest percentage gains in bakeries and tortilla manufacturing (+26.9%) and grain and oilseed milling (+22.2%).
- From 2003 to 2013, employment rose in three of New York’s food manufacturing industries including: dairy product manufacturing (+12.0%), bakeries and tortilla manufacturing (+8.7%) other food manufacturing (+4.3%).
- Employment declines were steepest in 2003-2013 in sugar and confectionery product manufacturing (-31.9%) and fruit and vegetable preserving and specialty foods (-25.0%).
- The largest percentage increases in total wages paid in 2003-2013 were in seafood product preparation and packaging (+43.6%) and other food manufacturing (+40.3%).
- The largest percentage increases in annual average wages paid in 2003-2013 were in seafood product preparation and packaging (+64.4%), animal food manufacturing (+38.6%) and other food manufacturing (+34.6%).

Food Manufacturing (NAICS 311), by Labor Market Region, New York State, 2013

Region	Number of Firms	Jobs	Total Wages (\$ millions)	Annual Average Wages
Capital	97	2,006	\$83.4	\$41,593
Central New York	72	1,433	\$62.0	\$43,259
Finger Lakes	135	6,255	\$289.7	\$46,322
Hudson Valley	252	5,976	\$271.5	\$45,436
Long Island	295	6,163	\$240.6	\$39,044
Mohawk Valley	62	2,282	\$98.7	\$43,235
New York City	1,088	15,377	\$501.8	\$32,633
North Country	37	1,022	\$46.5	\$45,513
Southern Tier	53	3,527	\$169.4	\$48,027
Western New York	149	7,934	\$381.7	\$48,106
New York State	2,268	52,345	\$2,169.6	\$41,448

- In 2013, New York City had the most food manufacturing firms (1,088) and workers (15,377) of any region in the state. It, however, also had the lowest industry wage (\$32,633) of any region, due to the predominance of bakeries and tortilla manufacturing, which has a relatively small annual average wage.
- Other labor market regions with at least 5,000 food manufacturing workers in 2013 include Western New York (7,934), Finger Lakes (6,255), Long Island (6,163) and Hudson Valley (5,976).
- In 2013, the three regions with the highest average wages in food manufacturing were Western New York (\$48,106), Southern Tier (\$48,027) and Finger Lakes (\$46,322).

Food Manufacturing (NAICS 311), by Labor Market Region, New York State, 2013

Region	% Share of Food Manufacturing Firms in NYS	% Share of Food Manufacturing Jobs in NYS	% Share of Food Manufacturing Total Wages Paid in NYS	% of Average Wages Paid (State Average = 100))
Capital	4.3%	3.8%	3.8%	100.4%
Central New York	3.2%	2.7%	2.9%	104.4%
Finger Lakes	6.0%	11.9%	13.4%	111.8%
Hudson Valley	11.1%	11.4%	12.5%	109.6%
Long Island	13.0%	11.8%	11.1%	94.2%
Mohawk Valley	2.7%	4.4%	4.5%	104.3%
New York City	48.0%	29.4%	23.1%	78.7%
North Country	1.6%	2.0%	2.1%	109.8%
Southern Tier	2.3%	6.7%	7.8%	115.9%
Western New York	6.6%	15.2%	17.6%	116.1%
New York State	100.0%	100.0%	100.0%	100.0%

- New York City accounted for 48.0% of food manufacturing firms, 29.4% of industry workers and 23.1% of total industry wages in New York State in 2013.
- Other labor market regions accounting for at least 10% of statewide food manufacturing employment in 2013 include: Western New York (15.2%), Finger Lakes (11.9%), Long Island (11.8%) and Hudson Valley (11.4%).

Trends in Food Manufacturing (NAICS 311), by Labor Market Region, New York State, 2003-2013

Region	% Change in Firms	% Change in Jobs	% Change in Total Wages Paid	% Change in Average Wages Paid
Capital	16.9%	-8.7%	16.8%	27.9%
Central New York	10.8%	-36.2%	-30.2%	9.4%
Finger Lakes	16.4%	-0.9%	36.4%	37.6%
Hudson Valley	21.2%	38.0%	72.8%	25.3%
Long Island	12.6%	-12.5%	3.6%	18.4%
Mohawk Valley	-10.1%	18.3%	79.1%	51.4%
New York City	24.9%	6.4%	8.5%	2.0%
North Country	-11.9%	-27.7%	2.8%	42.2%
Southern Tier	10.4%	25.2%	57.7%	25.9%
Western New York	-10.2%	-22.3%	-8.0%	18.4%
New York State	16.1%	-1.5%	17.1%	18.9%

- From 2003 to 2013, the number of food manufacturing firms increased in seven of 10 labor market regions. The largest percentage gains were recorded in New York City (+24.9%) and Hudson Valley (+21.2%).
- From 2003 to 2013, employment grew in just four of 10 labor market regions, including Hudson Valley (+38.0%), Southern Tier (+25.2%), Mohawk Valley (+18.3%) and New York City (+6.4%).
- Employment declines in 2003-2013 were steepest in these regions: Central New York (-36.2%), North Country (-27.7%) and Western New York (-22.3%).
- The largest percentage increases in total wages paid in 2003-2013 were in Mohawk Valley (+79.1%), Hudson Valley (+72.8%) and Southern Tier (+57.7%).

**Occupational Employment and Wages,
New York State,
Food Manufacturing (NAICS 311)**

SOC Code	Occupations Title	Jobs	Mean Wage	Median Wage
00-0000	Total all occupations	51,190	\$35,630	\$29,180
51-9111	Packaging and Filling Machine Operators and Tenders	4,570	\$29,870	\$28,350
51-3011	Bakers	4,370	\$26,280	\$24,630
51-3092	Food Batchmakers	4,160	\$29,190	\$26,970
53-7064	Packers and Packagers, Hand	2,710	\$22,780	\$21,450
51-3093	Food Cooking Machine Operators and Tenders	1,770	\$33,050	\$33,360
51-1011	First-Line Supervisors of Production and Operating Workers	1,690	\$54,300	\$51,660
51-2092	Team Assemblers	1,600	\$27,470	\$25,150
53-7051	Industrial Truck and Tractor Operators	1,270	\$35,060	\$35,040
41-2011	Cashiers	1,250	\$18,490	\$18,210
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,200	\$26,390	\$23,860
	Total, Top 10 Occupations	24,590		

- The top three occupations in the food manufacturing industry in New York State include: Packaging and Filling Machine Operators and Tenders (4,570), Bakers (4,370) and Food Batchmakers (4,160).
- Among the top 10 occupations, the three with the highest median wages include: First-Line Supervisors of Production and Operating Workers (\$51,660), Industrial Truck and Tractor Operators (\$35,040) and Food Cooking Machine Operators and Tenders (\$33,360).
- The top 10 occupations account for just under one-half of overall food manufacturing jobs in New York State.

**Selected Quarterly Workforce Indicators, New York State,
Food Manufacturing (NAICS 311)**

	2012			
	Employed	% of Employed	New Hires	Separations
Total	51,705	100.0%	7,772	7,294
Gender				
Male	33,319	64.4%	4,310	4,121
Female	18,386	35.6%	3,462	3,173
Age (years)				
14-21	3,629	7.0%	1,568	1,242
22-54	36,769	71.1%	5,183	4,873
55+	11,307	21.9%	1,021	1,179
Educational Attainment (workers 25+)				
Less than High School	8,437	16.3%	1,168	1,146
High School or equivalent; no college	14,786	28.6%	1,569	1,578
Some college or Associate degree	13,197	25.5%	1,479	1,482
Bachelor's degree or advanced degree	8,612	16.7%	1,096	1,041
Race and Ethnicity				
White (non-Hispanic or Latino)	33,110	64.0%	4,510	4,195
Black or African American (non-Hispanic or Latino)	4,661	9.0%	907	873
Asian (non-Hispanic or Latino)	3,856	7.5%	563	535
Other (non-Hispanic or Latino)	567	1.1%	124	109
Hispanic or Latino	9,510	18.4%	1,668	1,582
Firm Age (years)				
0-1	2,314	4.5%	947	737
2-3	1,706	3.3%	524	458
4-5	1,735	3.4%	371	366
6-10	5,320	10.3%	1,291	966
11+	40,631	78.6%	4,639	4,768
Firm Size (number of employees)				
0-19	9,223	17.8%	2,325	1,992
20-49	5,973	11.6%	1,126	1,045
50-249	12,451	24.1%	2,193	1,962
250-499	8,854	17.1%	1,279	1,167
500+	15,205	29.4%	849	1,128

According to the Quarterly Workforce Indicators data shown in the table above:

- The food manufacturing industry (NAICS 311) in New York State employed just over 51,700 workers in 2012.
- In 2012, New York State's food manufacturing industry made 7,772 new hires. This figure refers to the annual average of quarterly estimates of the number of workers who started a new job during each quarter.
- Similarly, the state's food manufacturers experienced 7,294 separations in 2012. This figure refers to the annual average of quarterly estimates of the number of workers whose job ended with a specific employer during each quarter.
- Just under two-thirds (64.4%) of the workers in New York's food manufacturing industry are male.
- More than 70% of industry workers are between 22 and 54 years of age.
- More than two in five (42.2%) food manufacturing workers have at least some college, including 16.7% with a bachelor's degree or higher.
- Most workers (64.0%) in New York's food manufacturing industry are non-Hispanic Whites.
- Together, Hispanics (18.4%) and Blacks (9.0%) account for 27.4% of industry workers.
- Older firms (i.e., those that are at least 11 years old) employ about four in five (78.6%) workers in New York State's food manufacturing industry.
- Looking at firm size, companies with at least 250 workers accounted for 46.5% of overall industry employment in the state in 2012. These largest firms, however, were responsible for a much smaller share of industry hiring – 27.4%.
- In contrast, the smallest firm size category (i.e., 0-19 employees) accounted for 17.8% of industry employment, but was responsible for 29.9% of industry hiring activity in 2012.

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