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2018 REGIONAL ECONOMIC LABOR OUTLOOK ALIGNMENT

North Country

Prepared by the CTE Technical Assistance Center of NY

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NORTH COUNTRY REGIONAL ECONOMIC LABOR OUTLOOK ALIGNMENT

National Career Clusters	Regional Economic Development Council Focus Industries ¹	Regional Industry Jobs with Strong Projected Growth (> 7% from 2014 through 2024) ²	Jobs in Significant Industries with Strong Projected Growth through 2022 ³	Further Description of Significant Industries
<p>Agriculture, Food and National Resources</p>	<p>Agricultural Production – Between 2010 and 2016, employment among agriculture, hunting, and fishing firms grew by 23 percent to 477 jobs.</p> <p>Workforce Development – A new Agriculture Academy was developed through a partnership between Cornell Cooperative Extension of St. Lawrence County and St. Lawrence-Lewis BOCES.</p> <p>The NCREDC continues to focus on three key strategies to promote agriculture in the region: 1) advancing high-tech, year-round food production; 2) expanding value-added food production; and 3) fostering a new generation of farms and agribusinesses through education and training. Highlights include:</p> <p>The Drive for 25 Farm to School project is focused on bringing food from local farms directly to school districts to feed the region’s students. Sixteen schools in Jefferson and St. Lawrence Counties initiated this effort, giving the counties’ 21,000 students access to fresh local food. The program will be a model for future expansion.</p> <p>The Hub on the Hill in Essex is a collaborative effort to bring shared processing resources to small farmers in the Adirondack region.</p>	<p>Farming, Fishing, and Forestry Occupations (5.1%)</p> <ul style="list-style-type: none"> - Agricultural Workers (9.9%) <p>Construction and Extraction Occupations (11.5%)</p> <ul style="list-style-type: none"> - Supervisors of Construction and Extraction Workers (10.2%) - Extraction Workers (33.3%) 		

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<p>Agriculture, Food and National Resources (continued)</p>	<p>Two greenhouse vegetable production projects are in process, both having been approved for past CFA funding. Agbotic, Inc. has an operational 15,000-square-foot greenhouse in Sackets Harbor, and Confluent Energy is in the preliminary development stages of a large-scale greenhouse production facility in Ogdensburg.</p> <p>Cornell Cooperative Extension of Jefferson County has continued its partnership with the Cornell Small Farms Program’s Northeast Beginning Farmers Project with a focus on veterans and active duty soldiers interested in agricultural careers.</p> <p>Kraft-Heinz (Lowville) has filled 70 of the 125 projected new FTE jobs associated with its multi-million-dollar expansion, which includes the addition of a new equipment line to produce string cheese.</p> <p>Value-added production is happening all over the North Country in small artisanal businesses. These entrepreneurs are producing goat cheese, mushrooms, grass-fed beef, craft beer, value-added maple products, etc., to generate more revenue and diversify the agricultural base of the region.</p>			

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<p>Agriculture, Food and National Resources (continued)</p>	<p>The region’s agricultural sector is also playing a role in the life sciences. Midway International Logistics also serves as a warehousing and fulfillment center for antibodies extracted from poultry eggs for use in biotech, biomedical, pharmaceuticals, and academic research.</p> <p>PreProcess Inc., located just south of Watertown, is one of six companies across the state to be awarded licenses for research on industrial hemp and its use in medical and other commercial applications. The company hopes to have a hemp processing and manufacturing facility.</p> <p>Aviagen North America, a German-owned hatchery facility, completed a \$5 million renovation of a previously vacant facility, and is fully operational, now employing 45 people—exceeding its original projection of 40 new jobs. The hi-tech Watertown facility hatches poultry breeding stock, which it ships into Canada and around the world.</p>			

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<p>Agriculture, Food and National Resources (continued)</p>	<p>CLEAN ENERGY – Solar and wind projects and renewable energy educational programs dominated the region’s clean energy focus over the last year. Solar power installations are projected to save money in energy costs for North Country facilities and generate construction jobs. Seven wind projects are currently proposed across the region. Multiple educational resources have been made available to communities working on renewable energy projects.</p> <p>Creating the Greenest Energy Economy – Between 2011 and 2016, the New York State Energy Research and Development Authority (NYSERDA) facilitated the construction of 1,584 renewable energy installations for residential, industrial, and commercial uses throughout the region. In 2015 alone, NYSERDA completed 557 projects in the North Country, a five-fold increase in assistance compared to 104 projects in 2010.</p>			

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<p>Architecture and Construction</p>	<p>A project containing four 2 MW solar arrays in the northern Clinton County town of Mooers will connect to the NYSEG grid, with electricity generated being sold at an anticipated 10 percent discount to customers enrolled in the Community Solar Program. This represents a total investment of \$17.4 million in the Clinton County economy and will create over 100 construction jobs.</p> <p>The Vermont Green Line (VGL) Project, currently in Article 7 review, will yield critical distribution capacity for the North Country system. VGL is a 60-mile-long HVDC electricity line that will provide improvements to the transmission/distribution system for locally generated renewable energy and open up new markets for that energy. The project anticipates the creation of up to two permanent full-time jobs, each with an annual salary of approximately \$100,000; as well as an estimated 49 construction jobs, projected to result in a \$9.9 million construction payroll over three years of construction. Total investment in the project is projected to be over \$175 million.</p>	<p>Installation, Maintenance, and Repair Occupations (9.9%) Other Installation, Maintenance, and Repair Occupations (9.2%)</p>		

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<p>Architecture and Construction (continued)</p>	<p>Other Proposed Priority Projects</p> <ul style="list-style-type: none"> • Wastewater Treatment Plant Improvements (Village of Lowville, Lewis County). Projected Number of Construction Jobs: 70 • International Paper Competitive Optimization Phase 1 (Ticonderoga, Essex County). Projected Number of Construction Jobs: 25 • Plattsburgh International Airport Hotel (Plattsburgh, Clinton County). Projected Number of Construction Jobs: 80 • Business Complex at Watertown International Airport – Infrastructure (Dexter, Jefferson County). Projected Number of Construction Jobs: 50 • Watertown Airport Sewer Connection (Hounsfield, Jefferson County). Projected Number of Construction Jobs: 20 • Lake St. Lawrence Resort Event Center (Louisville, St. Lawrence County). Projected Number of Construction Jobs: 30 • Blue Mountain Lake Destination Lodging (Blue Mountain Lake, Hamilton County). Projected Number of Construction Jobs: 50 • Wastewater Treatment Plant Upgrades (Ogdensburg, St. Lawrence County). Projected Number of Construction Jobs: 62 			

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Arts, A/V Technology & Communications				
Business Management & Administration	<p>The North Country’s Innovation Hot Spot has been involved in the creation of 39 new companies. In addition to the start-ups, 13 companies have expanded or added new products, thanks to the help of the North Country’s Hot Spot program. These companies have created 70 new jobs and retained 14. Most recently they have heightened focus on high school students to expand the critical mass of projects and engage a larger portion of the regional population.</p> <p>In the 2016–17 fiscal year, the Hot Spot has facilitated 106 entrepreneurship projects. Part of this success is due to a new partnership formed in Saratoga Springs. In March 2017, the Hot Spot launched “SPARK Saratoga” in conjunction with Saratoga Economic Development Corporation, resulting in 17 projects as of July 2017. The Damon Hall Advanced Manufacturing Incubator/Accelerator was launched in March 2017 and after renovations to a building that was vacant for 22 years, now has 22,000 square feet of new space available for startup companies. One advanced manufacturing company, LC Drives, is already operating in the space.</p>	<p>Management Occupations (6.0%)</p> <ul style="list-style-type: none"> - Advertising, Marketing, Promotions, Public Relations, and Sales Managers (13.0%) - Operations Specialties Managers (11.1%) <p>Business and Financial Operations Occupations (9.3%)</p> <ul style="list-style-type: none"> - Business Operations Specialists (8.8%) <p>Office and Administrative Support Occupations (3.3%)</p> <ul style="list-style-type: none"> - Supervisors of Office and Administrative Support Workers (11.5%) - Information and Record Clerks (8.8%) 		

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<p>Education and Training</p>	<p>Home to the world-renowned Trudeau Institute, a global leader in biomedical research, and a number of growing companies in the field, the North Country is ahead of the curve in advancing the Life Sciences Cluster. Leveraging the region’s extensive academic institutions, the North Country has a highly integrated network of education and economic development in the life sciences.</p> <p>High School: Throughout the region, the most popular programs offered by the Board of Cooperative Educational Services (BOCES) are those that focus on entry- and higher-level positions in healthcare professions.</p>	<p>Education, Training, and Library Occupations (4.9%)</p> <ul style="list-style-type: none"> - Postsecondary Teachers (11.3%) - Librarians, Curators, and Archivists (7.7%) 	<p>Educational Services</p> <ul style="list-style-type: none"> - Elementary School Teachers, except Special Education - Middle School Teachers, except Special and Vocational Education - Coaches and Scouts 	<p>Educational services accounts for almost 19,000 jobs between the public and private sectors, which is the most employment of any “significant industry” other than public administration. This sector suffered a loss of 800 jobs (-4.1%) between 2009 and 2014 with declines in primary and secondary schools. The industry’s 2014 average annual wage (\$43,400) was nearly \$5,000 above the all-industry average annual wage. Growth in educational services is driven more by demographics than by economic conditions. Growth is expected to rebound over the next few years as local school districts throughout the North Country are largely over the severe budget pressures they faced in the last recession.</p>
<p>Finance</p>		<p>Business and Financial Operations Occupations (9.3%)</p> <ul style="list-style-type: none"> - Financial Specialists (9.8%) 		

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<p>Government & Public Administration</p>			<p>Public Administration</p>	<p>With nearly 20,000 employees in 2014, the public sector remains a relatively large employer in the North Country. Average annual wages (\$53,300) in the public sector are also significantly above the all industry average annual wage of \$38,900. Both state and local government have a relatively high proportion of total employment as the North Country has several state correctional, disability, and recreational facilities. There are many small local government entities that are too far apart to benefit from economies of scale. During the last recession, the public sector suffered a significant decline in employment, and this sector is expected to continue to decline slightly over the next several years.</p>

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<p>Health Science</p>	<p>In the spring, construction began on a new, 41,000-square-foot, state-of-the-art sports fitness center adjacent to the Olympic Training Center in Lake Placid. The Adirondack Health facility will offer emergency care, primary care, and sports medicine. Its developers envision high levels of collaboration between the sports fitness and Olympic Training Centers, with opportunities for beneficial research in the areas of exercise physiology and physiological testing that will help improve athletic performance.</p> <p>Life Sciences Business Development:</p> <ul style="list-style-type: none"> • SterRx, a 2012 pharmaceutical manufacturing start-up in Plattsburgh, secured a major new contract that will create 60–80 jobs over the next year. • Midway International Logistics (Watertown) provides warehousing and fulfillment services for a Montreal-based company that extracts high quality antibodies from poultry eggs. Midway then ships these antibodies across the Northeast for use in the biomedical, biotech, and pharmaceutical industries, and in academic research laboratories. 	<p>Life, Physical, and Social Science Occupations (10.4%)</p> <ul style="list-style-type: none"> - Social Scientists and Related Workers (10.2%) <p>Healthcare Practitioners and Technical Occupations (12.4%)</p> <ul style="list-style-type: none"> - Health Diagnosing and Treating Practitioners (13.6%) - Health Technologists and Technicians (10.4%) - Other Healthcare Practitioners and Technical Occupations (9.1%) <p>Healthcare Support Occupations (14.7%)</p> <ul style="list-style-type: none"> - Nursing, Psychiatric, and Home Health Aides (15.4%) - Occupational Therapy and Physical Therapist Assistants and Aides (27.3%) - Other Healthcare Support Occupations (10.2%) 	<p>Ambulatory Health Care Services</p> <ul style="list-style-type: none"> - Receptionists and Clerks - Licensed Practical and Licensed Vocational Nurses - Registered Nurses - Emergency Medical Technicians and Paramedics - Dental Assistants - Dental Hygienists - Medical Assistants <p>Hospitals</p> <ul style="list-style-type: none"> - Registered Nurses - Nursing Assistants - Licensed Practical and Licensed Vocational Nurses - Medical and Health Services Managers - Radiologic Technologists and Technicians 	<p>Like education, growth in health care industry employment is 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 the North Country’s population continues to age. Two industries from the health care sector are on the significant industry list: ambulatory health care services (NAICS Industry 621) and hospitals (NAICS Industry 622). Between 2009 and 2014, ambulatory health care services added 600 jobs, while hospitals added 200 jobs. Hospitals (\$59,500) and ambulatory health care services (\$49,200) have wage levels above the all-industry average. This is largely a reflection of the mix of occupations in each health care industry.</p>

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<p>Hospitality & Tourism</p>	<p>TOURISM</p> <p>The North Country is leveraging tourism to revitalize its communities and create the fastest growing export sector in the region. Progress has been made on many fronts with this strategy in the last year, in many cases attracting state resources that then leverage private investment. In other instances, the state recognized a need that clearly fits with the strategy and paves the way for future action. Many of the projects have provided new visitor facilities or attractions that enhance communities and lay the foundation for private investment in lodging and visitor-oriented retail facilities. Highlights of regional tourism priorities follow:</p> <p>In January, the state announced a \$32 million investment to transform the former North Hudson theme park known as Frontier Town into a visitor’s center and recreation hub, and to spark more private investment in the venture. One local business, Paradox Brewery, has announced a \$2.7 million production facility investment at the site, which will create 22 new jobs.</p> <p>Up to \$20 million will be invested in major upgrades to two key winter visitor attractions: Whiteface Mountain and Gore Mountain ski resorts.</p>	<p>Food Preparation and Serving Related Occupations (7.2%)</p> <ul style="list-style-type: none"> - Supervisors of Food Preparation and Serving Workers (10.0%) - Food and Beverage Serving Workers (9.2%) <p>Building and Grounds Cleaning and Maintenance Occupations (9.0%)</p> <ul style="list-style-type: none"> - Supervisors of Building and Grounds Cleaning and Maintenance Workers (8.5%) - Building Cleaning and Pest Control Workers (9.2%) - Grounds Maintenance Workers (9.4%) <p>Personal Care and Service Occupations (14.5%)</p> <ul style="list-style-type: none"> - Tour and Travel Guides (50.0%) <p>Production Occupations (3.3%)</p> <ul style="list-style-type: none"> - Food Processing Workers (7.4%) 	<p>Food Service and Drinking Places</p> <ul style="list-style-type: none"> - Combined Food Preparation and Serving Workers, Including Fast Food - Cooks, Restaurant - Bartenders - First-Line Supervisors-Managers of Food Preparation and Serving Workers - Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop - General and Operations Managers 	<p>With more than 11,400 workers in 2014, the food services and drinking places (NAICS 722) industry employs the third most workers of any other three-digit NACIS sector of the North Country economy except educational services and public administration. Tourism is the main driver of the food services and drinking places industry.</p>

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<p>Hospitality & Tourism (continued)</p>	<p>LODGING</p> <p>Lodging is the single largest factor in expanding and sustaining a successful tourism industry. Visitors spend the most money on lodging and it is the aspect of their trip that most will secure first. Since the start of the Regional Council process, the North Country has made a priority of putting tools in place to attract the modern lodging infrastructure that is key to moving the region’s tourism industry forward. The region has leveraged several state awards to attract private lodging investment.</p> <p>In 2015, Empire State Development augmented the NCREDC’s Transformational Community Tourism Revolving Loan Fund with \$3 million. The fund was created in 2012 to provide low-interest loans targeted at hospitality and tourism investment. Administered by the Development Authority of the North Country, \$197,000 was committed over the last year, leveraging \$1.96 million in private investment for the purchase and rehabilitation of three hotels in Lake Placid and Wilmington.</p>			

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Hospitality & Tourism (continued)	<p>LODGING</p> <p>the Lodging Task Force made the following recommendations to the North Country Regional Council:</p> <ul style="list-style-type: none"> • Make changes to current financial incentives, including a waiver to the current 40 percent cap on the Transformational Community Tourism Revolving Loan Fund. • Conduct a lodging feasibility and market analysis study to provide better information to potential investors. • Focus on a small number of communities to collaboratively and comprehensively work toward a transformational lodging investment. • Provide additional support to assist potential investors in maximizing the local, state, and federal programs currently available. • Develop two Strategic Destination Plans, one for the 1000 Islands and one for the Adirondacks and develop a marketing and sales program to solicit lodging investment. 			

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Human Services		<p>Community and Social Service Occupations (10.2%)</p> <ul style="list-style-type: none"> - Counselors, Social Workers, and Other Community and Social Service Specialists (10.2%) - Religious Workers (9.7%) <p>Healthcare Support Occupations (14.7%)</p> <ul style="list-style-type: none"> - Nursing, Psychiatric, and Home Health Aides (15.4%) - Occupational Therapy and Physical Therapist Assistants & Aides (27.3%) - Other Healthcare Support Occupations (10.2%) <p>Personal Care and Service Occupations (14.5%)</p> <ul style="list-style-type: none"> - Supervisors of Personal Care and Service Workers (12.7%) - Animal Care and Service Workers (12.2%) - Entertainment Attendants and Related Workers (13.3%) - Personal Appearance Workers (7.5%) - Other Personal Care and Service Workers (16.1%) 		
Information Technology		<p>Computer and Mathematical Occupations (14.2%)</p> <ul style="list-style-type: none"> - Computer Occupations (14.3%) 		
Law, Public Safety, Corrections and Security				

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<p>Manufacturing</p>	<p>Two years ago, the North Country coalesced around its diverse, dynamic Transportation Equipment & Aerospace (TE&A) Cluster as a top opportunity for fostering regional growth in advanced manufacturing, with the goal of working collaboratively to maximize the cluster’s productivity and expansion through various support strategies, and also to tap the power of the cluster to attract additional companies and investments.</p> <p>With expansions and the arrival of several new cluster companies over the last two years, the North Country now hosts 50 TE&A companies. More than 8,100 people are employed directly and indirectly by the transportation equipment, aerospace, and advanced materials industries in the region. From Bombardier and Volvo (Nova Bus and Prevost) in Plattsburgh to Hi-Lite Airfield Services in Watertown, existing companies are investing and modernizing, positioning themselves for global competitiveness and growth. And from Norsk Titanium to emerging ventures being incubated through our Innovation Hot Spot at Clarkson University, the North Country is becoming globally recognized as a rapidly emerging hub for innovation and technology in the TE&A sector.</p>	<p>Production Occupations (3.3%)</p> <ul style="list-style-type: none"> - Assemblers and Fabricators (12.9%) 	<p>Transportation Equipment Manufacturing</p> <ul style="list-style-type: none"> - Team Assemblers - Machinists - Inspectors, Testers, Sorters, Samplers, and Weighers - Electrical and Electrical Equipment Assemblers - Mechanical Engineers - Welders, Cutters, Solderers, and Brazers 	<p>The transportation equipment manufacturing (NAICS Industry 336) sector was selected as a “significant industry” because employment grew from 800 in 2009 to 1,100 in 2014, a 37.5 percent growth rate. The annual average wage (\$59,900) was also more than \$20,000 higher than the all-industry annual average wage. Employment is expected to grow by more than 20 percent over the next several years.</p>

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<p>Manufacturing (continued)</p>	<p>As the North Country enters the third phase of a 20-year strategy that previously developed the region’s role in rail and road equipment, Norsk Titanium has become a centerpiece for the region’s advancing TE&A Cluster and its claim to a globally important role in aerospace. Thanks for this advancement is due to Governor Andrew Cuomo, who in recognizing the potential of our TE&A Cluster, also supported creation of the new Institute for Advanced Manufacturing (IAM) at Clinton Community College, where classes began in the fall 2017 semester. The \$12.7 million project provides flexible support of regional manufacturing, with an emphasis on the TE&A Cluster and featuring creative partnerships with Clarkson and others.</p> <p>Significantly, the cluster continues to feature a diverse presence in every one of the region’s seven counties, with new players and innovations across the North Country. With continued focus and state partnership, the next two years will be extraordinary, from the full completion of the Norsk Titanium project and the attraction of several new companies that are now actively in the pipeline, to engagement in emerging technologies such as electric buses.</p>	<p>-</p>		

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<p>Marketing, Sales and Service</p>		<p>Sales and Related Occupations (5.8%)</p> <ul style="list-style-type: none"> - Supervisors of Sales Workers (7.1%) 	<p>General Merchandise Stores</p> <ul style="list-style-type: none"> - Retail Sales Persons - First-line Supervisors-Managers of Office and Administrative Support Workers - Laborers and Freight, Stock, and Material Movers, Hand - Customer Service Representatives - General and Operations Managers 	<p>Between 2009 and 2014, employment in the general merchandise stores (NAICS Industry 452) sector fell slightly. However, this industry employs more than 5,000 workers throughout the North Country, and employment is projected to increase by nearly 10 percent over the next few years.</p>
<p>Science, Technology, Engineering & Mathematics</p>	<p>Home to the world-renowned Trudeau Institute, a global leader in biomedical research, and a number of growing companies in the field, the North Country is ahead of the curve in advancing the Life Sciences Cluster. Leveraging the region's extensive academic institutions, the North Country has a highly integrated network of education and economic development in the life sciences.</p>	<p>Architecture and Engineering Occupations (7.3%)</p> <ul style="list-style-type: none"> - Engineers (7.8%) <p>Life, Physical, and Social Science Occupations (10.4%)</p> <ul style="list-style-type: none"> - Life Scientists (8.0%) - Physical Scientists (11.1%) - Social Scientists and Related Workers (10.2%) - Life, Physical, and Social Science Technicians (11.8%) 		

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Transportation, Distribution & Logistics		Installation, Maintenance, and Repair Occupations (9.9%) - Vehicle and Mobile Equipment Mechanics, Installers, and Repairers (12.3%) Transportation and Material Moving Occupations (7.6%) - Air Transportation Workers (12.5%) - Motor Vehicle Operators (7.5%) - Material Moving Workers (7.9%)		

¹ 2017 Progress Report – NORTH COUNTRY REGION ECONOMIC DEVELOPMENT COUNCIL <https://regionalcouncils.ny.gov/sites/default/files/2018-10/NorthCountry2018ProgressReport.pdf>

² New York State Department of Labor Long-Term Industry Employment Projections, 2014-2024 <https://www.labor.ny.gov/stats/2014-2024-Statewide-and-Regional-Long-Term-Occupational-Projections.xls>

³ Significant Industries - New York State Department of Labor <https://labor.ny.gov/stats/Significant-Industries.shtm>