Employment in New York City's Manufacturing Districts

Employment trends in M districts outside Manhattan: 2000 - 2014

NYC PLANNING

This presentation analyzes recent employment trends in New York City's industrial areas and provides quantitative insights that inform the implementation of the 10-point Industrial Action Plan announced by Mayor de Blasio in November 2015.

An analysis of New York State Department of Labor, Quarterly Census of Employment and Wages data for the years 2000, 2008, 2010 and 2014, showed significant employment growth in manufacturing (M) districts outside Manhattan, in both industrial and non-industrial sectors. Although non-industrial-sector employment experienced a higher net job growth between 2000 and 2014, M Districts remain predominantly industrial, with Industrial Business Zones representing the largest concentrations of industrial employment.

The three largest industrial-sector industries in M districts outside Manhattan -- *Specialty Trade Contractors, Grocery Wholesale* and *School and Employee Bus Transportation* -- all grew between 2010 and 2014, although there are differences between IBZs and other M districts. This industrial growth has occurred in the context of a healthy local economy and population gains in New York City, alongside significantly larger growth in non-industrial employment citywide.

This annotated presentation explores recent employment trends in New York City's manufacturing districts outside Manhattan. It is based on quantitative research completed by the NYC Department of City Planning in the aim of better understanding the industries established in M districts in the Bronx, Brooklyn, Queens and Staten Island and how they have evolved over the last decade.

A manufacturing district, designated by the letter M (M1-1, M2-2, for example), is a zoning district in which industrial and manufacturing uses, most commercial uses and some community facility uses are permitted. Industrial uses are subject to a range of performance standards. New residential development is typically not allowed, except in some districts with special designations.

Moreover, this analysis differentiates between M districts with an Industrial Business Zone-designation and those without (NYC EDC, n.d.). Established in 2006, IBZs function as key industrial areas that accommodate and encourage a range of industrial jobs and activities (NYC Office of the Mayor, 2005). Industrial and manufacturing businesses in IBZs are served by City-selected nonprofit organizations and may be eligible for tax incentives, financing tools and workforce development programs. While, up to this point, no specific land use regulations have been tied to IBZs, the Bloomberg administration committed not to rezone these areas to permit residential use.

In November 2015, Mayor de Blasio announced a 10-point Industrial Action Plan (NYC Office of the Mayor, 2015), which aims to strengthen core industrial areas, invest in industrial and manufacturing businesses, and advance industrial-sector training and workforce development opportunities for New Yorkers. The Plan's proposals include zoning changes, infrastructure investments, loans and grants for mission-driven developers and the establishment of an Advanced Manufacturing Center.

This quantitative employment analysis provides important background information for the realization of the 10-point Industrial Action Plan by enhancing public understanding of industrial and non-industrial–sector employment trends in manufacturing districts.

The following research questions guided the analysis:

- How has employment in industrial zones outside Manhattan evolved between the years 2000, 2008, 2010 and 2014?
- What specific industries dominate employment in M districts outside Manhattan?
- What industries are growing in M districts outside Manhattan?
- How do trends differ in Industrial Business Zones and other M districts?
- How do different Industrial Business Zones compare?
- Where are large and growing industries located in M districts?
- What is happening to *Manufacturing* in NYC excluding Manhattan?

This analysis relied on Quarterly Census of Employment and Wages (QCEW) 3rd quarter data for 2000, 2008, 2010 and 2014, provided to the NYC Department of City Planning (DCP) by the New York State Department of Labor. The QCEW serves as a near census of wage and salary employment, thus being a highly reliable source. However, the QCEW excludes the self-employed, the armed forces, proprietors, domestic workers, unpaid family workers and certain railroad workers (BLS, 2014).

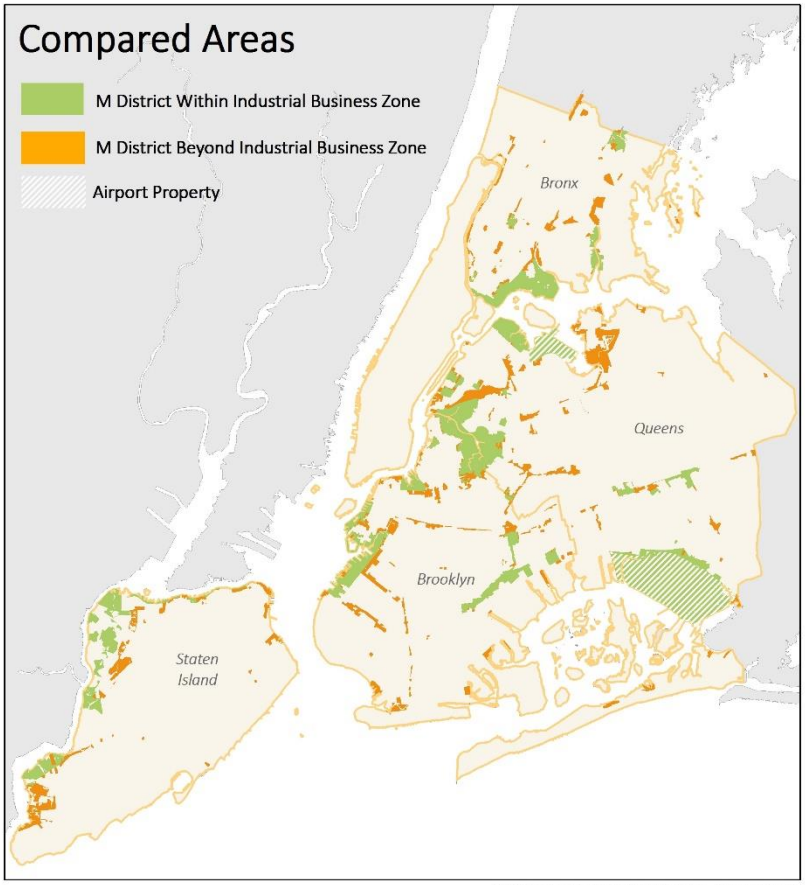
Under an agreement with NYSDOL permitting local governments to access firm-level data for economic development purposes, provided that certain confidentiality requirements are maintained, the Department of City Planning has geocoded the QCEW data to the tax lot. Accordingly only QCEW records that were successfully geocoded to the lot were included in this analysis. Furthermore, non-privately-owned businesses and master records for multi-establishment employers were omitted.

Since this analysis focused on employment trends in industrial areas, only QCEW records located within manufacturing districts were taken into account, distinguishing between Industrial Business Zones (IBZs) and non IBZ areas. This differentiation was relevant because IBZs were designated as core industrial areas (NYC Office of the Mayor, 2005).

In order to maintain comparability, all QCEW records located in M districts in Manhattan, in paired M/R Districts (such as Special Mixed Use Districts and certain Special Districts) and within the airport properties of JFK and LaGuardia were excluded. These geographies were recognized as being subject to different economic dynamics than the other M districts in the Bronx, Brooklyn, Queens and Staten Island. For instance, firms based in Manhattan's M districts were excluded because they are dominated by office-based employment, due to their proximity to the central business district.

The QCEW data were classified according to the North American Industry Classification System (NAICS) definitions (US Census, n.d.). For disclosure purposes, the industry sector *Agriculture, Forestry, Fishing and Hunting* was excluded from all analysis. Additionally, this analysis adopted a classification of "industrial" and "non-industrial" sub-sector Industries, previously completed by DCP (see appendix).

Year	Success Rate of Geocoding (Citywide)	Final Data Input for Present Analysis (No. of Records)
2000	95 percent	12,273
2008	94 percent	12,992
2010	97 percent	14,769
2014	98 percent	16,675



NYC Department of City Planning, January 2016

COMPARED GEOGRAPHIES	Surface in Acres (Buildable Tax Lot Surface)	Employee per Acre in 2014
IBZs excluding Airport Property	7069	24.4
M districts beyond IBZs excluding Manhattan & MX-Districts	5199	27.0

Source: NYSDOL QCEW 2014 3rd quarter

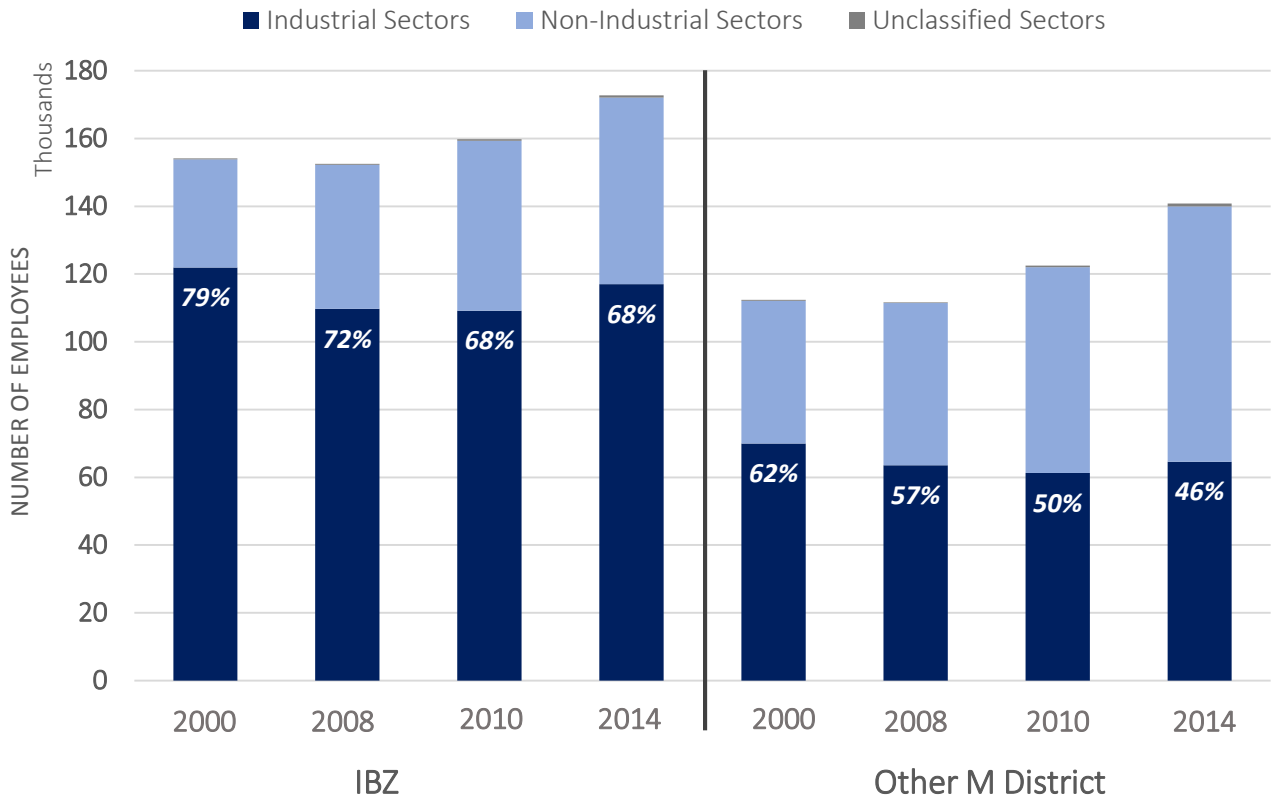
Results

IBZs cover 36 percent more built/buildable land than M districts outside of IBZs, but the compared areas have a similar employment density, with 24.4 employees per acre in IBZs and 27 employees per acre in M districts outside of IBZs.

Note on the methodology: To calculate the surface area of IBZs and M districts beyond IBZs, only built or buildable tax lot surface was taken into account. Non-buildable surfaces were defined as NYC and NYS parks properties, national and NYSDEC wetlands areas, water and street surfaces. An overlay was performed in a GIS environment. The NYC Department of City Planning's GIS database was the source for this exercise.

Employment in M Districts since 2000

M-Zones outside Manhattan accounted for 7.7% of NYC total job gain 2010 – 2014

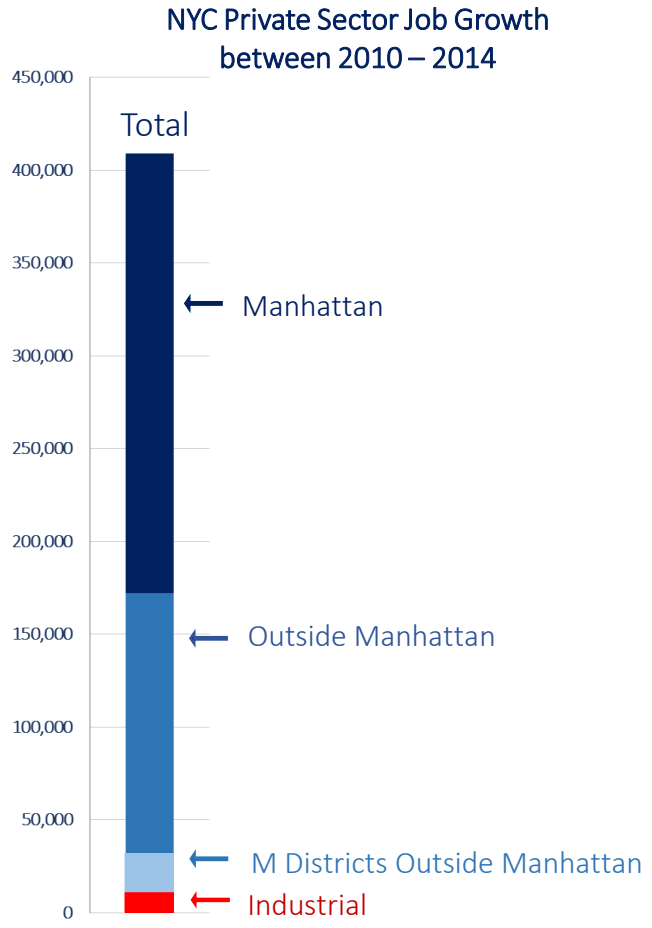


Source: NYSDOL QCEW 2000, 2008, 2010, 2014 3rd quarter.
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

From 2000 to 2014, employment in M districts increased significantly. In 2014, there were 16,675 firms and 313,603 jobs in M districts (IBZs and other M districts), representing a net gain of 4,402 firms (+35.9 percent) and 46,484 jobs (+17.4 percent) since the year 2000. Non-industrial employment steadily grew in M districts between 2000 and 2014, while industrial employment declined between 2000 and 2008 and rebounded after 2010. In 2014, industrial employment had not yet bounced back to the year 2000 levels of employment, but was following an upward trend, which is expected to endure (NYSDOL, 2012).

The share of industrial sector employment in the total private sector was over 68 percent in IBZs and 46 percent in M districts beyond IBZs. This difference is mainly a consequence of how the IBZ boundaries were drawn; IBZs were created to encompass core industrial areas in New York City (NYC Office of the Mayor, 2005). However, between 2010 and 2014, industrial and non-industrial jobs grew at the same rate in IBZs, whereas other M districts became less industrial.

Boroughs outside Manhattan accounted for 42% of NYC total job gain 2010 – 2014

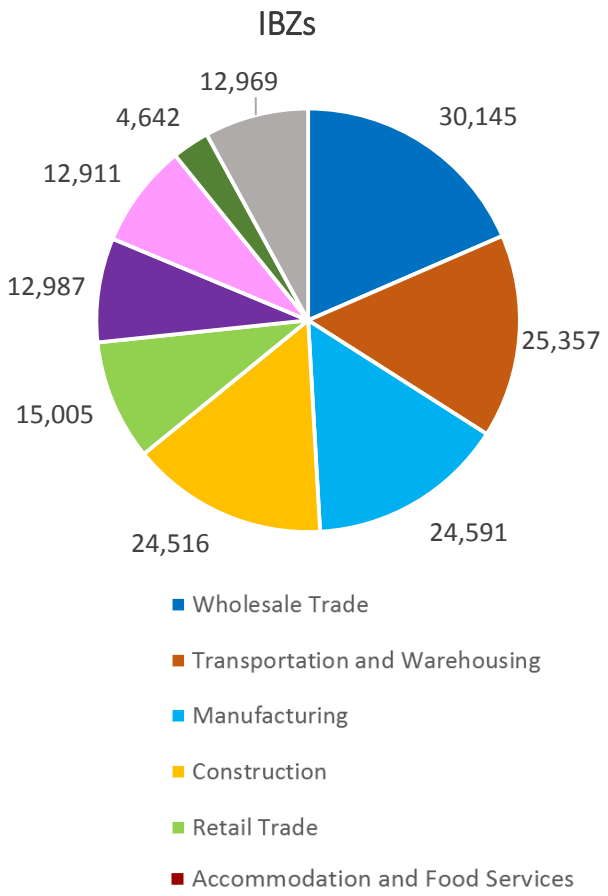


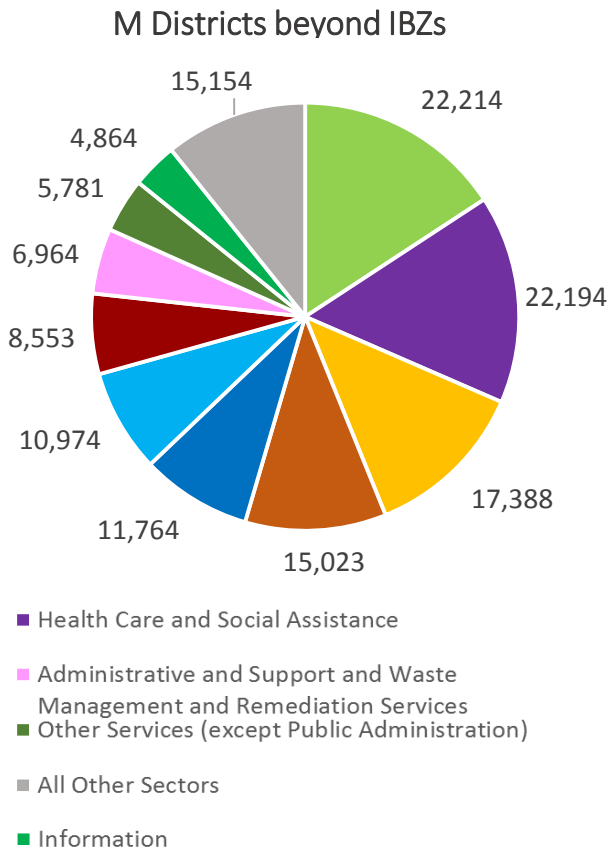
Source: NYSDOL QCEW 2010 & 2014 3rd quarter

A closer look at citywide employment growth indicates that only a small fraction of the overall net employment gain took place in M districts outside Manhattan. Indeed, NYC added approximately 410,000 private-sector jobs* between 2010 and 2014, of which 31,000* were located in M zones outside Manhattan (7.7 percent, less than half of which were industrial). Without question, the recent industrial growth has occurred in the context of a dramatic and widespread boost in employment in NYC. The economic uplift and population growth that characterizes post-recession NYC has in that sense also benefitted many industrial businesses, by ensuring a high demand for construction, transportation, food distribution, waste management and other industrial services.**

*Excluding master records for multi-establishment employers and based on QCEW data that was successfully geocoded by NYC Department of City Planning.

** While this study was in preparation, NYSDOL released third-quarter 2015 QCEW data, which shows a continuation of the prior year's trend of large annual increases in private employment, including small gains in industrial-sector industries. The distribution of the 2015 increases within M districts will require further analysis outside the scope of this study.





Source: NYSDOL QCEW 2014 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

In 2014, the prevalent industry sectors in IBZs were *Wholesale Trade, Transportation and Warehousing*, *Manufacturing* and *Construction,* accounting for two thirds of all employment. Accordingly, the largest sectors in IBZs are all industrial.

In M districts beyond IBZs, industrial sectors are somewhat smaller and just over half of the employees worked in *Retail Trade*, *Health Care & Social Assistance* (both non-industrial) *Construction* and *Transportation*.

Industrial Employment Trends

Industrial Sectors in M-Zones outside Manhattan accounted for 2.7% of NYC total job gain 2010 – 2014

Source: NYSDOL QCEW 2000 & 2014 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

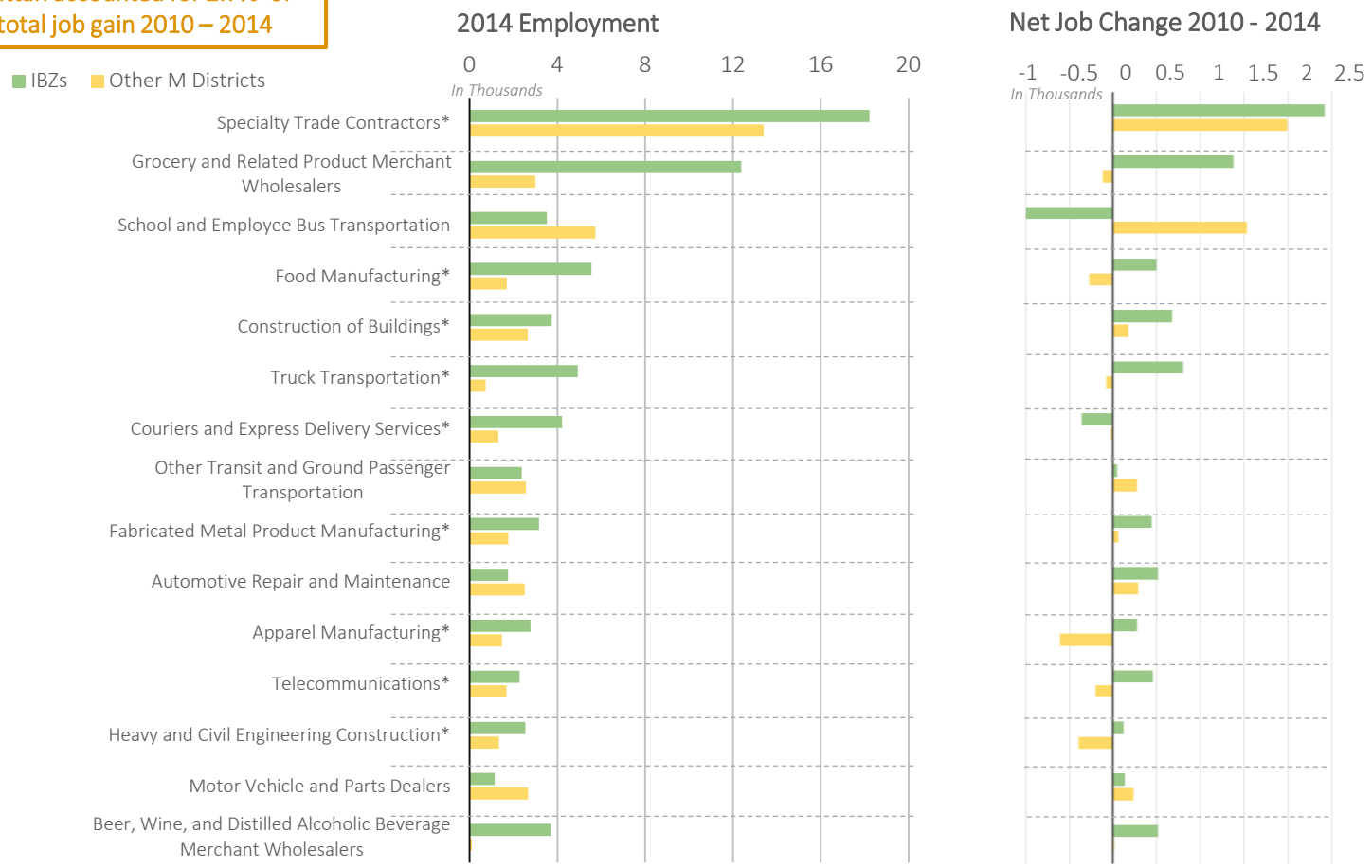
Wholesale Trade, Construction and *Transportation and Warehousing* dominating industrial employment in M districts is a recent phenomenon: in the year 2000, *Manufacturing* was the largest industrial sector with almost 70,000 employees. In 2014, only 35,565 *Manufacturing* employees remained. In contrast, all other large industrial sectors gained employment during the same time period, with *Construction* gaining the most since 2000.

A look at recent, post-recession industrial employment trends reveals that most industrial sectors grew, with a gain of 7,838 industrial employees in IBZs and 3,165 in other M-Zones. *Construction* experienced the largest net gain, followed by *Wholesale Trade,* which grew only in IBZs. Furthermore, since 2010 *Manufacturing* ceased to lose employment and appears to have stabilized, due to growth in IBZs.

Motion Picture and Sound Recording Industries experienced the highest relative employment gain between 2010 and 2014, with an increase of 53.3 percent in IBZs. This industry was virtually non-existent in M-zones in 2000, and has since thrived, benefitting from New York State subsidy programs (NYSFILM, 2015).

Largest Industrial-Sector Groups in 2014

Industrial Sectors in M-Zones outside Manhattan accounted for 2.7% of NYC total job gain 2010 – 2014



**NAICS Industry Sub-Sector (3-digit). Non-asterisked industries are NAICS Industry Groups (4-digit). NAICS levels were combined to allow for a better comparison.*
Source: NYSDOL QCEW 2010 & 2014 3rd quarter. Analysis excludes M districts in Manhattan, paired M districts, and airport properties

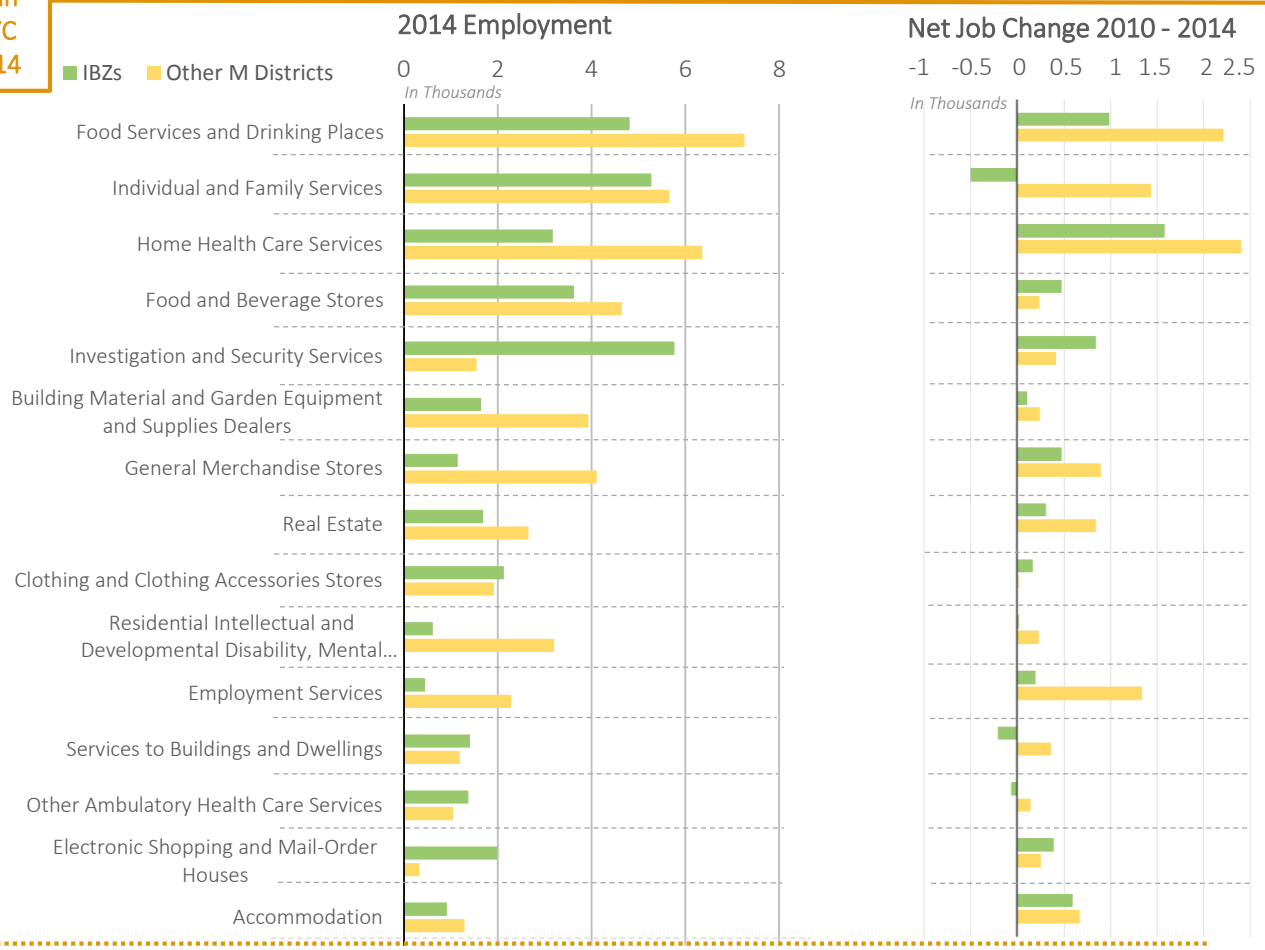
Within specific industry sub-sectors and groups, *Specialty Trade Contractors* (31,621 employees in 2014) and *Grocery Wholesalers* (15,372 employees in 2014) are the largest industrial-sector industries in M districts outside Manhattan, amounting to 26 percent of all industrial employment in that geography. They are followed by *School and Employee Bus Transportation, Food Manufacturing, Construction of Buildings, Truck Transportation,* and *Couriers and Express Delivery Services;* all industries employing between 5,000 and 10,000 workers in M districts outside of Manhattan. Most of those industries have a higher share of employment in IBZs than they do in M districts beyond IBZs, except for *School and Employee Bus Transportation.*

Regarding employment trends since 2010, most large industrial-sector industries gained employment, except for *Couriers, Apparel Manufacturing* and *Heavy and Civil Engineering Construction*. The largest industrial-sector industries also experienced the largest net job gains (+4,409 jobs in *Specialty Trade Contracting*, +1,256 jobs in *Grocery Wholesale*) between 2010 and 2014.

**Specialty Trade Contractors* predominantly engage in plumbing, heating, air-conditioning and electrical jobs, but also perform specific construction activities such as pouring concrete, site preparation and painting.

Largest Non-Industrial-Sector Groups in 2014

Non-Industrial Sectors in M-Zones outside Manhattan accounted for 5% of NYC total job gain 2010 – 2014



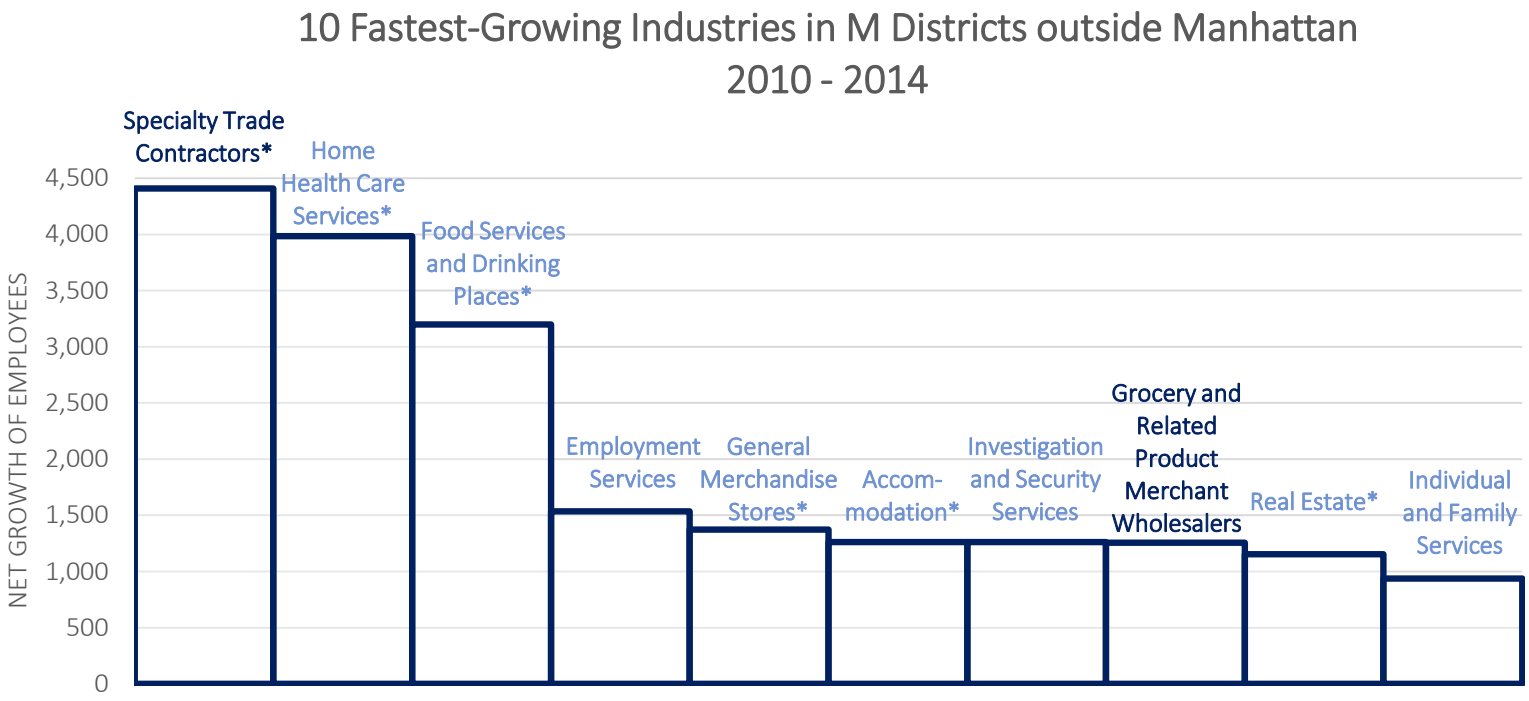
**NAICS Industry Sub-Sector (3-digit). Non-asterisked industries are NAICS Industry Groups (4-digit). NAICS levels were combined to allow for a better comparison.*

Source: NYSDOL QCEW 2010 & 2014 3rd quarter. Analysis excludes M districts in Manhattan, paired M districts, and airport properties

The largest non-industrial-sector industries in all M districts outside Manhattan are *Food Services and Drinking Places (*12,073 employees in 2014), *Individual and Family Services* (10,940 employees in 2014) and *Home Health Care Services* (9,537 employees in 2014). In IBZs in particular*, Investigation and Security Service*s are the largest non-industrial-sector employer (5,769 employees in 2014).

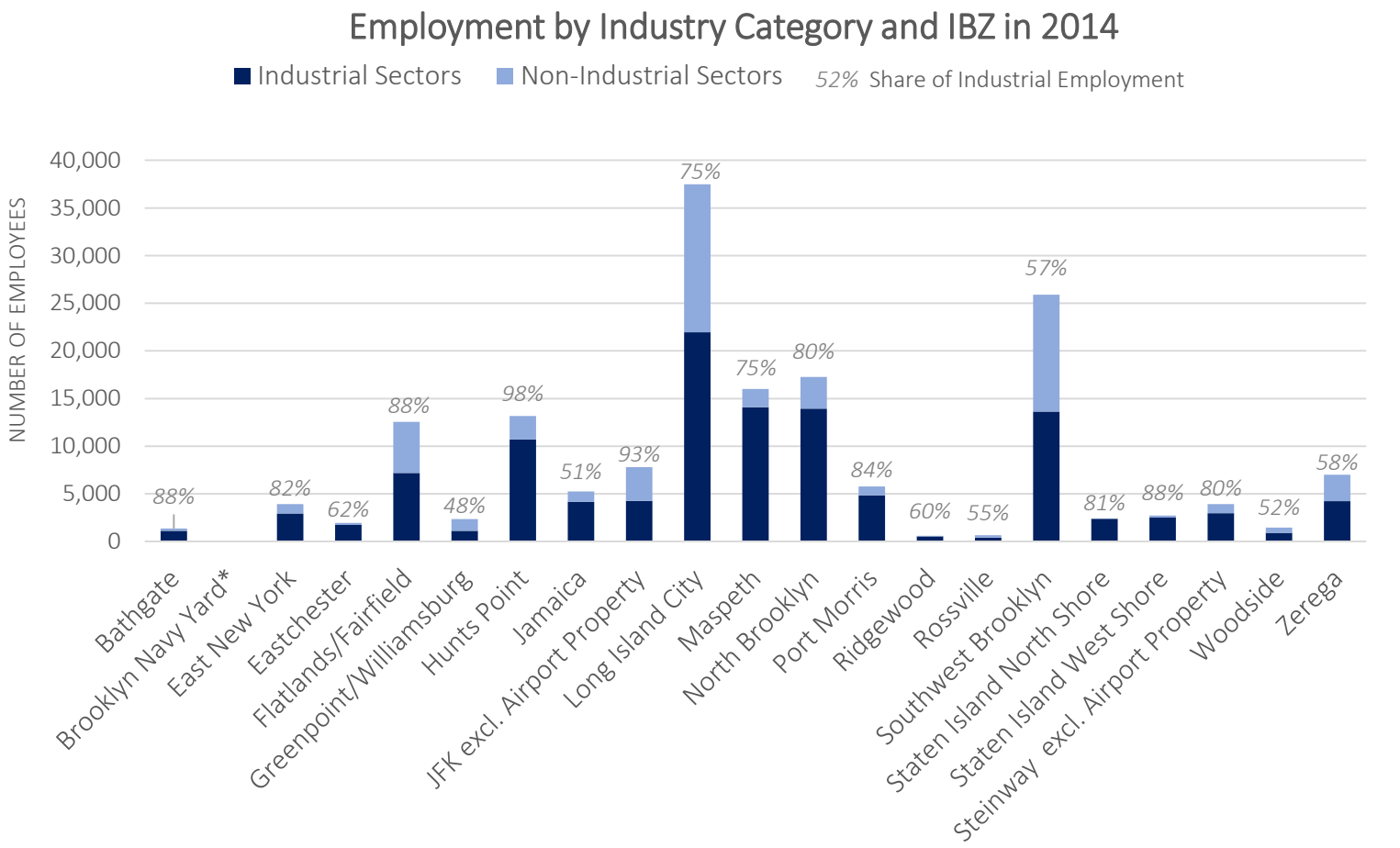
Most non-industrial-sector industries gained jobs between 2010 and 2014, with the larger sectors experiencing larger net gains.

M-Zones outside Manhattan accounted for 7.7% of NYC total job gain 2010 – 2014



**NAICS Industry Sub-Sector (3-digit). Non-asterisked industries are NAICS Industry Groups (4-digit). NAICS levels were combined to allow for a better comparison.*
Source: NYSDOL QCEW 2010 & 2014 3rd quarter. Analysis excludes M districts in Manhattan, paired M districts, and airport properties

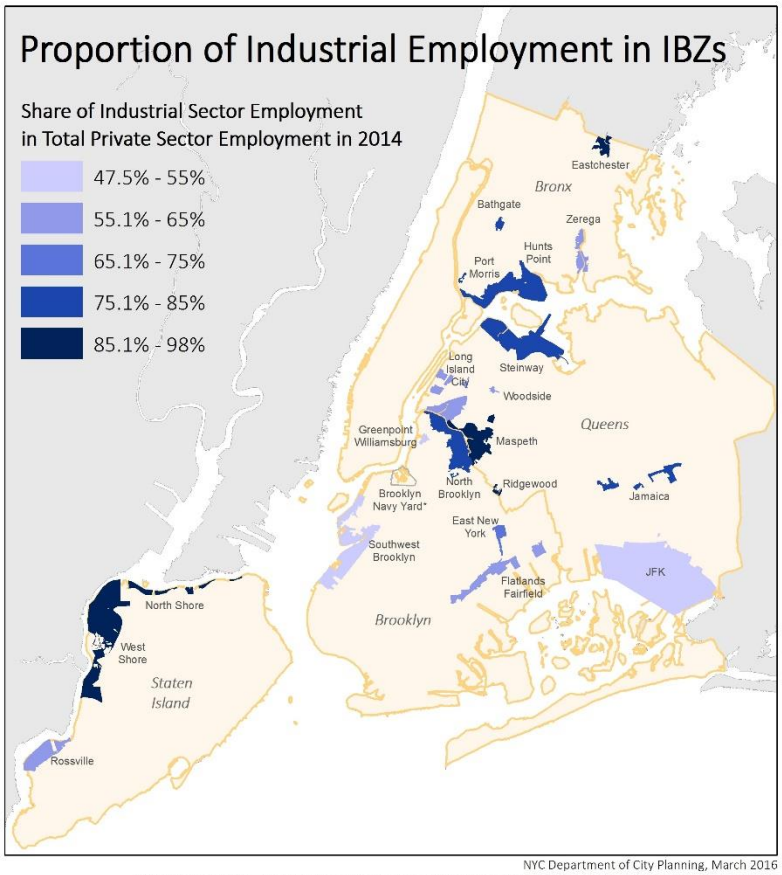
While both industrial and non-industrial-sector employment has increased in M districts outside Manhattan, non-industrial-sector industries as a whole have experienced a higher net job growth. *Specialty Trade Contracting* did gain the most jobs between 2010 and 2014, but most other industrial-sector industries fared less well in comparison to non-industrial-sector industries.



Source: NYSDOL QCEW 2014 3rd quarter
Analysis excludes businesses located on airport property and Brooklyn Navy Yard

A comparison of the 21 IBZs reveals that the Long Island City IBZ has the most employment with close to 38,000 workers, reflecting both the large geographic area of this IBZ as well as its historic higher density industrial loft building stock. It alone accounts for almost 22 percent of all employment in IBZs. Long Island City is followed by the Southwest Brooklyn, North Brooklyn, Maspeth, Hunts Point and Flatlands/Fairfield IBZs, which all have over 10,000 employees and together account for 49 percent of all employment in IBZs citywide. Out of the 21 IBZs, 10 have less than 4,000 employees. Those smaller IBZs account for nearly 14 percent of all employment in IBZs citywide.*

*The Brooklyn Navy Yard has been excluded from the IBZ comparison. The Quarterly Census of Employment and Wages does not adequately represent the employment situation at the Navy Yard, due to a number of Navy Yard-specific factors. The Brooklyn Navy Yard IBZ is unique since the entire IBZ is managed by a not-for-profit corporation with the aim of providing a prosperous environment for industrial users and businesses. A significant share of employees at the Navy Yard are independent contractors, self-employed or businesses who are headquartered elsewhere. These businesses are typically absent from the QCEW. While this data issue may exist in other IBZs, it is generally moderate with self-employment being more marginal, but in the particular case of the Brooklyn Navy Yard IBZ, the data gap is exacerbated.

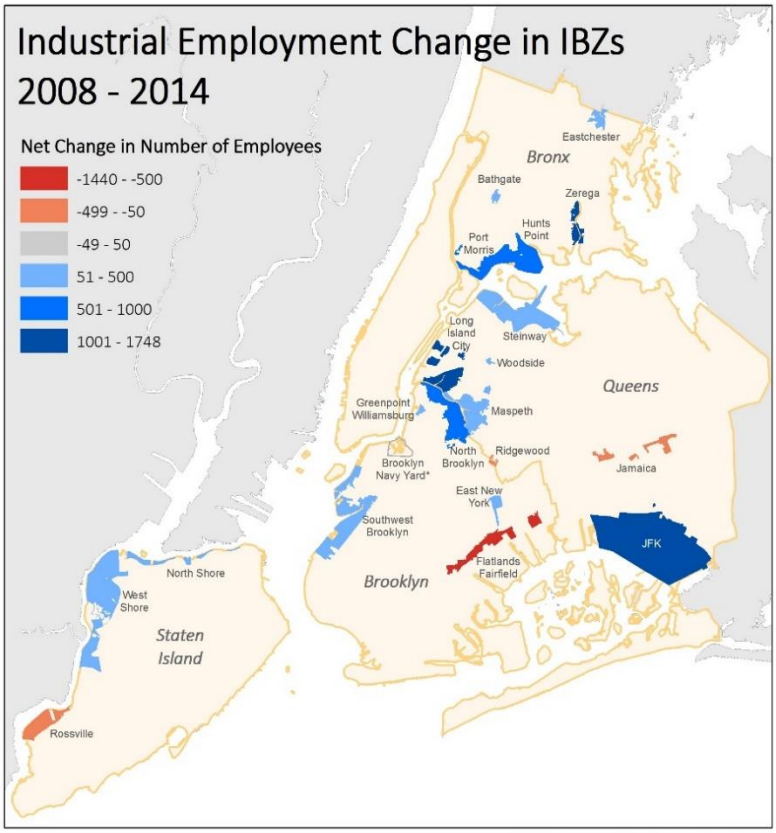


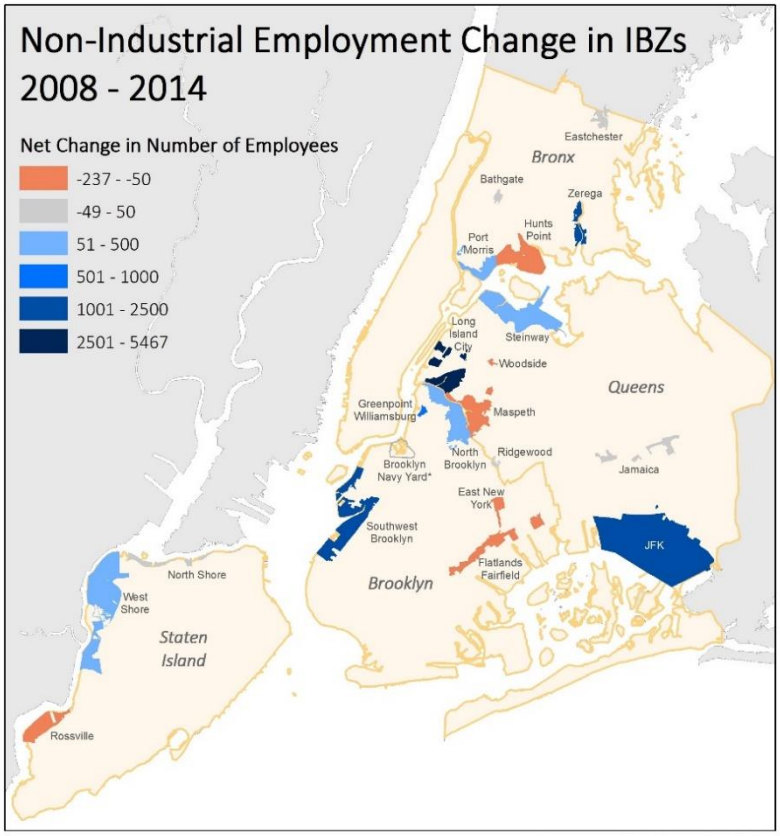
NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd quarter 2014. Brooklyn Navy Yard IBZ excluded

Analysis excludes businesses located on airport property and Brooklyn Navy Yard

In 2014, the most industrial IBZs were the North and West Shore of Staten Island (with 98 percent and 93 percent industrial employment, respectively), followed by Maspeth, Eastchester and Ridgewood (all 88 percent industrial). The least industrial IBZ is Greenpoint/Williamsburg, with 48 percent industrial employment.

Among the large IBZs with over 10,000 employees, Maspeth, Hunts Point and North Brooklyn are highly industrial (more than 80 percent). Long Island City, Southwest Brooklyn and Flatlands/Fairfield have a much lower share of industrial employment (58 percent, 52 percent and 57 percent, respectively).

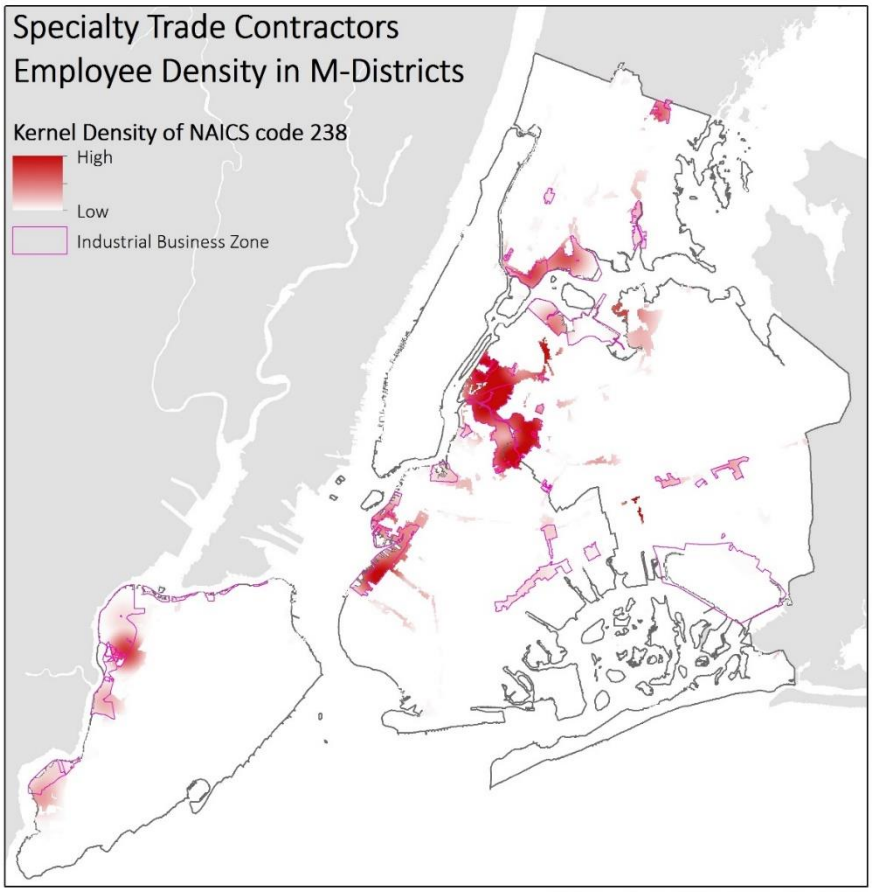




Analysis excludes businesses located on airport property and Brooklyn Navy Yard

Comparing 2008, the last peak in the economic cycle, with 2014, the most recent available firm-level data, most IBZs gained both industrial and non-industrial employment. Since 2008, industrial employment has grown the most in the Long Island City, JFK (excluding airport property) and Zerega IBZs, all gaining over 1,200 industrial employees. Meanwhile, industrial jobs declined substantially in the Flatlands/Fairfield IBZ (-1,440), and to a much lesser extent in the Jamaica, Ridgewood IBZs and the Southwest shore of Staten Island (Rossville IBZ).

Non-industrial employment grew most in the Long Island City IBZ (+5,467), followed by Southwest Brooklyn, Zerega (>2,000) and JFK (excluding airport property, +1,737). A few IBZs lost non-industrial employment between 2008 and 2014: however, the job losses are quite moderate and do not exceed 250 jobs in any IBZ.



NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

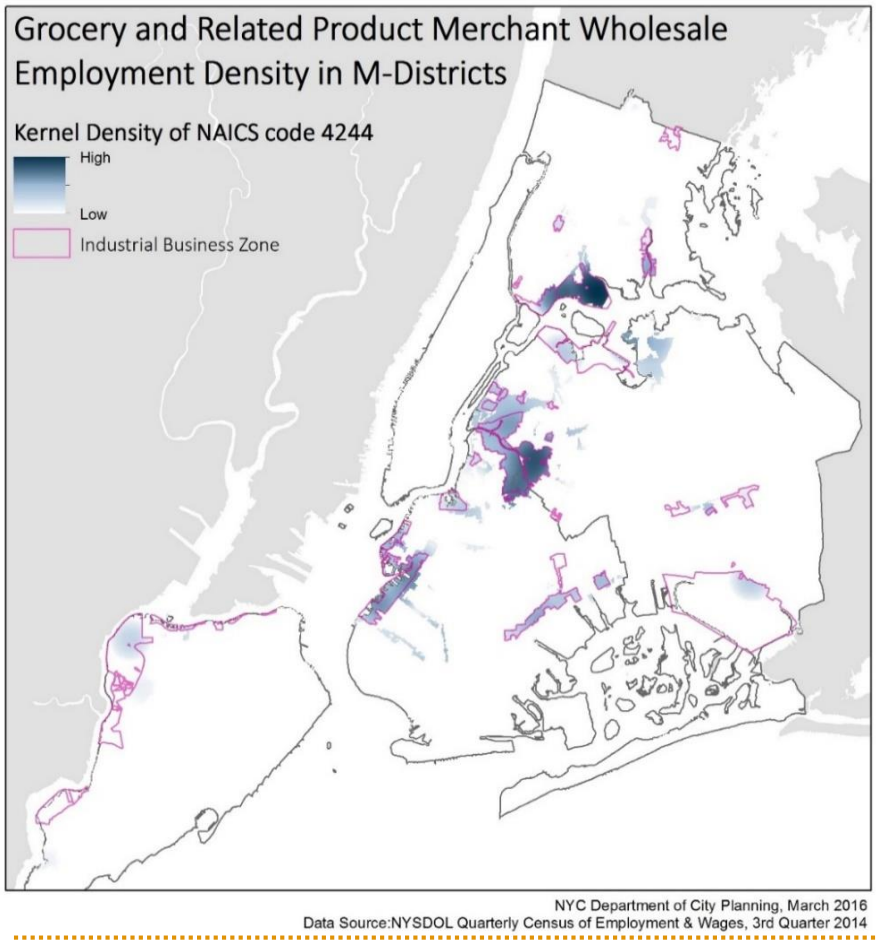
Specialty Trade Contractors		Firms	Employees
IBZ	# in 2014	823	18,227
	Net change since 2010	+48	+2417
	Percent change since 2010	+6.2%	+15.3%
other M-District	# in 2014	740	13,394
	Net change since 2010	+38	+1992
	Percent change since 2010	+5.4%	+17.5%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

The following slides take a closer look at the seven largest industrial-sector industries that stood out on slide 8. The accompanying maps were created using ArcGIS' Kernel Density tool, which calculates the density of point features around an output raster cell. Firms were weighted according to the number of employees, in order to represent employment density. Since this analysis regarded only M districts, all other zoning districts were masked for the purpose of adequate representation. The employment values were stretched by a standard deviation value of 2.5, which allows for a better representation of the data.

Not every map has the same implication: Food manufacturing employees typically work on the site of the business, whereas construction or transportation employees will often work offsite at specific job sites, and only occasionally frequent the headquarters out of which employment is reported.

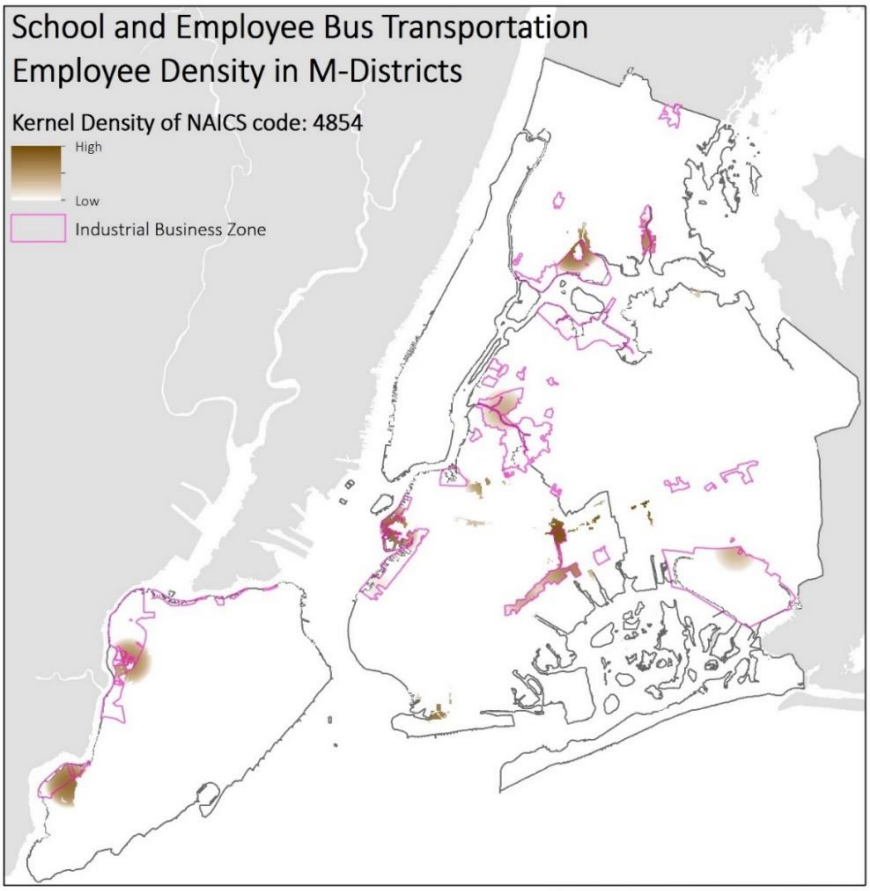
Specialty Trade Contracting, the largest industry in M districts outside Manhattan, is concentrated in Long Island City, Maspeth, Woodside, Greenpoint, East Williamsburg, as well as Sunset Park. The industry is present both in IBZs and M districts outside IBZs, and has grown significantly since 2010.



Grocery and Related Product Merchant Wholesalers			
		Firms	Employees
IBZ	# in 2014	551	12,377
	Net change since 2010	+79	+1375
	Percent change since 2010	+16.7%	+12.5%
other M District	# in 2014	204	2,995
	Net change since 2010	0	-119
	Percent change since 2010	0.0%	-3.8%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Food distribution employment is predominantly in IBZs and is concentrated in Hunts Point, Maspeth and East Williamsburg. While the industry has grown a lot in IBZs, it has somewhat decreased in M districts beyond IBZs.



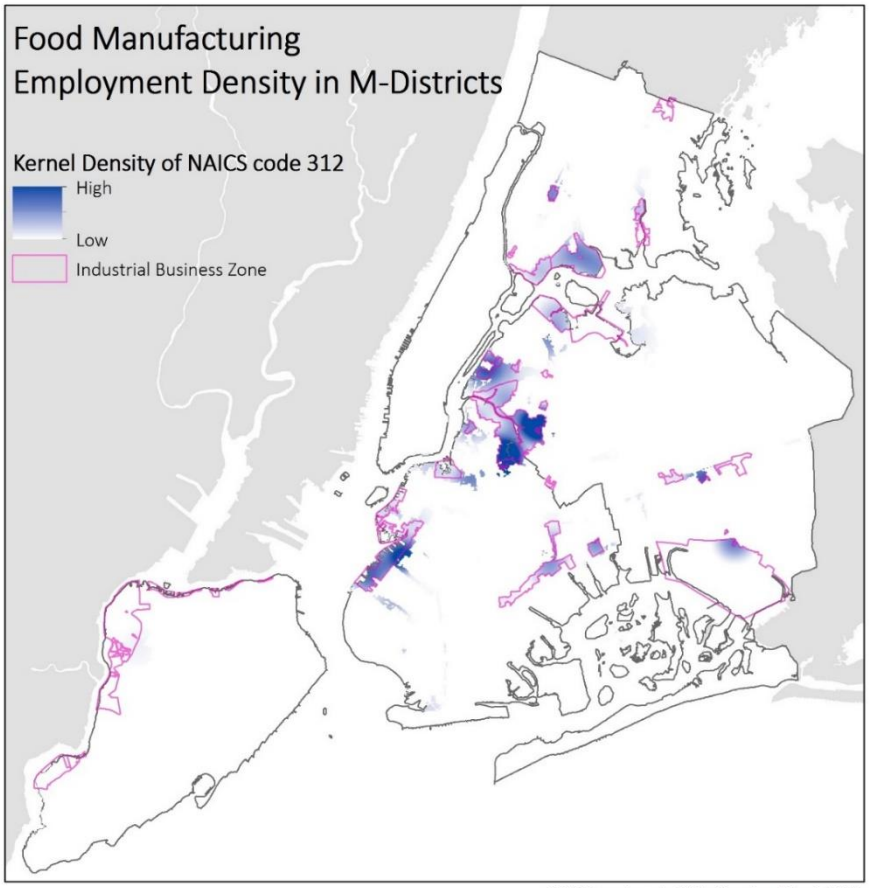
NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

School and Employee Bus Transportation			
		Firms	Employees
IBZ	# in 2014	32	3,521
	Net change since 2010	-8	-992
	Percent change since 2010	-20.0%	-22.0%
other M District	# in 2014	42	5,727
	Net change since 2010	-1	+1528
	Percent change since 2010	-2.3%	+36.4%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

School and Employee Bus Transportation is prevalent in East New York, South West Brooklyn, Hunts Point and Staten Island. Overall, there was a net growth in employment between 2010 and 2014.

The loss of *School and Employee Bus Transportation* employees in IBZs and their simultaneous increase in M districts outside Manhattan is presumably rather due to a shift in the location out of which employment is reported, rather than actual employment gains and losses in the respective areas. To the extent that *School Bus Transportation* services are mostly contracted by the City, the City's decision in 2013 to put new contracts out for bid likely resulted in the observed shifts in employment from IBZs to M districts (NYC Office of the Mayor, 2013).

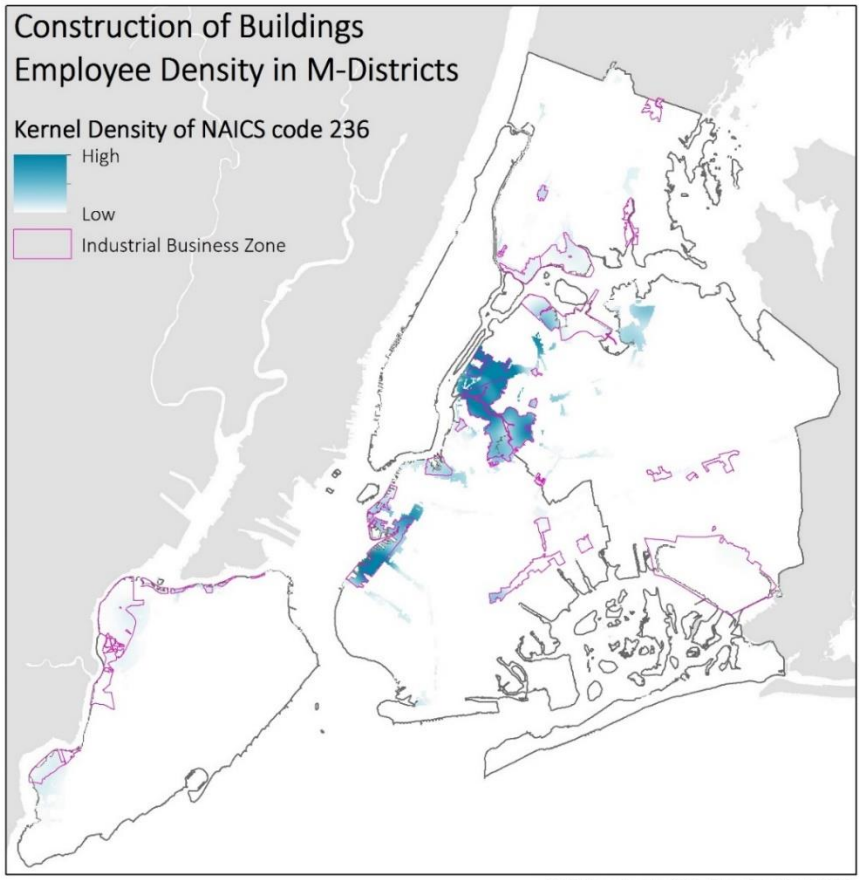


NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

Food Manufacturing		Firms	Employees
IBZ	# in 2014	112	5,554
	Net change since 2010	-1	+497
	Percent change since 2010	-0.9%	+9.8%
other M Districts	# in 2014	87	1,693
	Net change since 2010	+1	-273
	Percent change since 2010	+1.2%	-13.9%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Food Manufacturing is present in many IBZs, with concentrations in Maspeth, East Williamsburg and Sunset Park. While the total number of firms has not changed in IBZs or M districts, *Food Manufacturing* gained some employment in IBZs, meaning that firms increased in average size, and lost employment in other M districts, with firms becoming smaller on average.

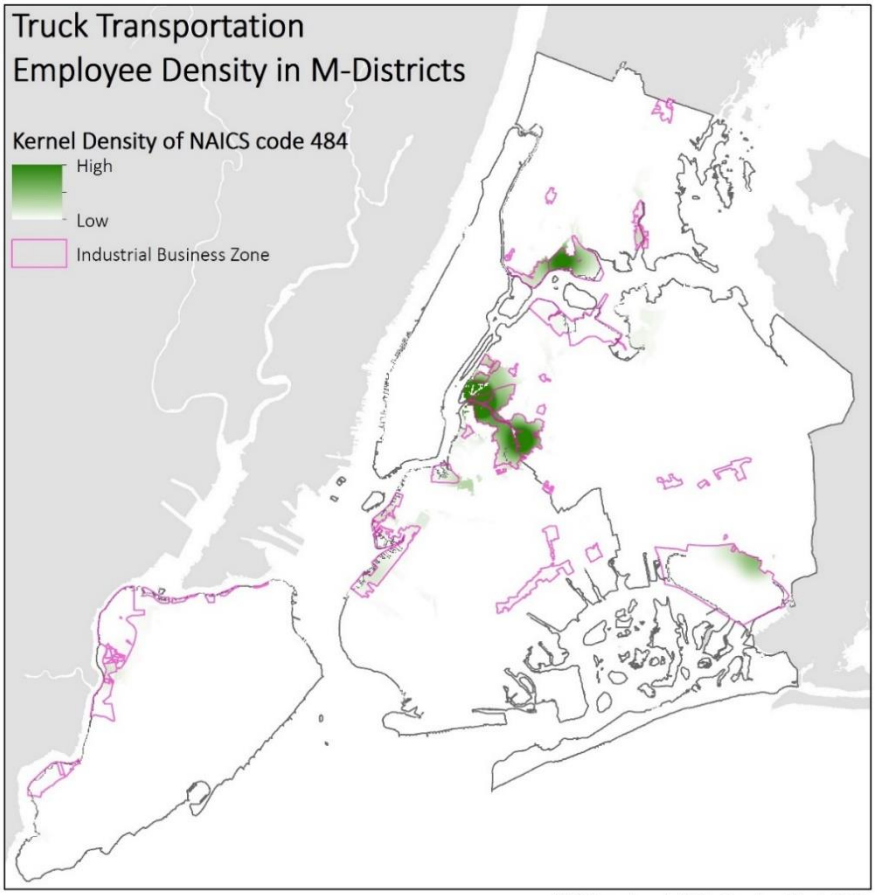


NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

Construction of Buildings		Firms	Employees
IBZ	# in 2014	261	3,746
	Net change since 2010	+13	+678
	Percent change since 2010	5.2%	+22.1%
other M District	# in 2014	273	2,649
	Net change since 2010	+32	+177
	Percent change since 2010	13.3%	7.2%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

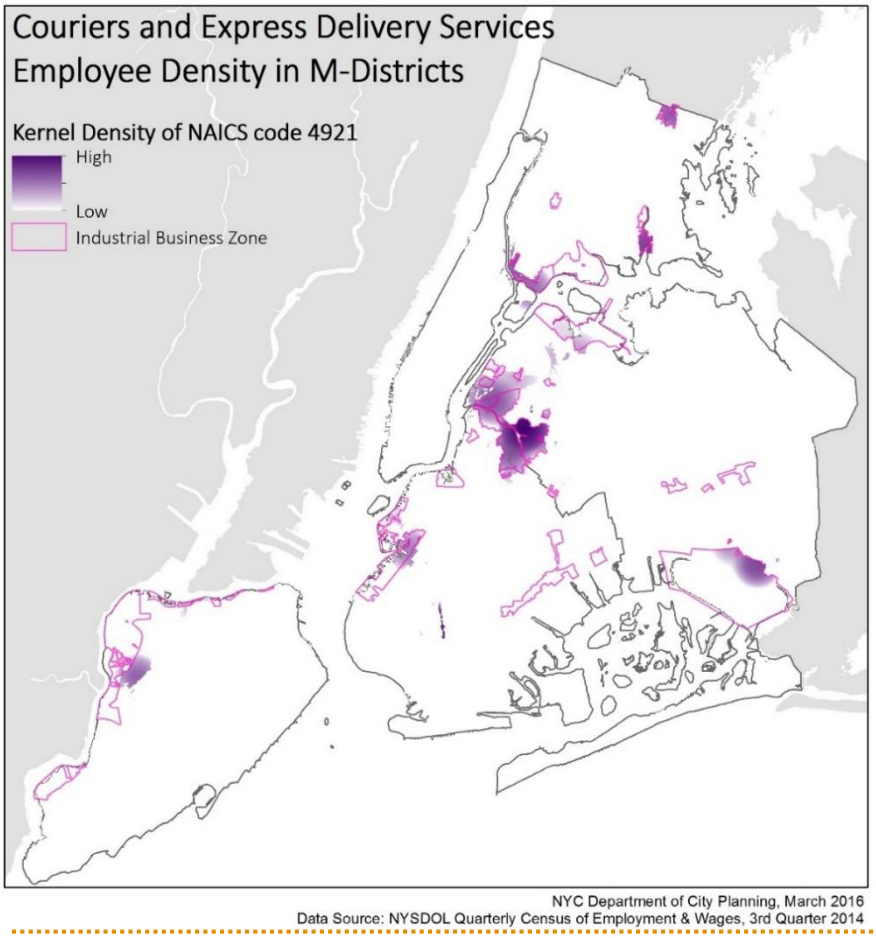
Construction of Buildings jobs are primarily located in Long Island City, Greenpoint, Woodside, Gowanus and Sunset Park. The industry has grown both in the number of firms and employees, with a 22 percent increase in employment in IBZs between 2010 and 2014.



Truck Transportation			
		Firms	Employees
IBZ	# in 2014	201	4,938
	Net change since 2010	0	+802
	Percent change since 2010	0.0%	+19.4%
other M District	# in 2014	83	736
	Net change since 2010	-8	-81
	Percent change since 2010	-8.8%	-9.9%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M-Districts in Manhattan, paired M-Districts, and airport properties

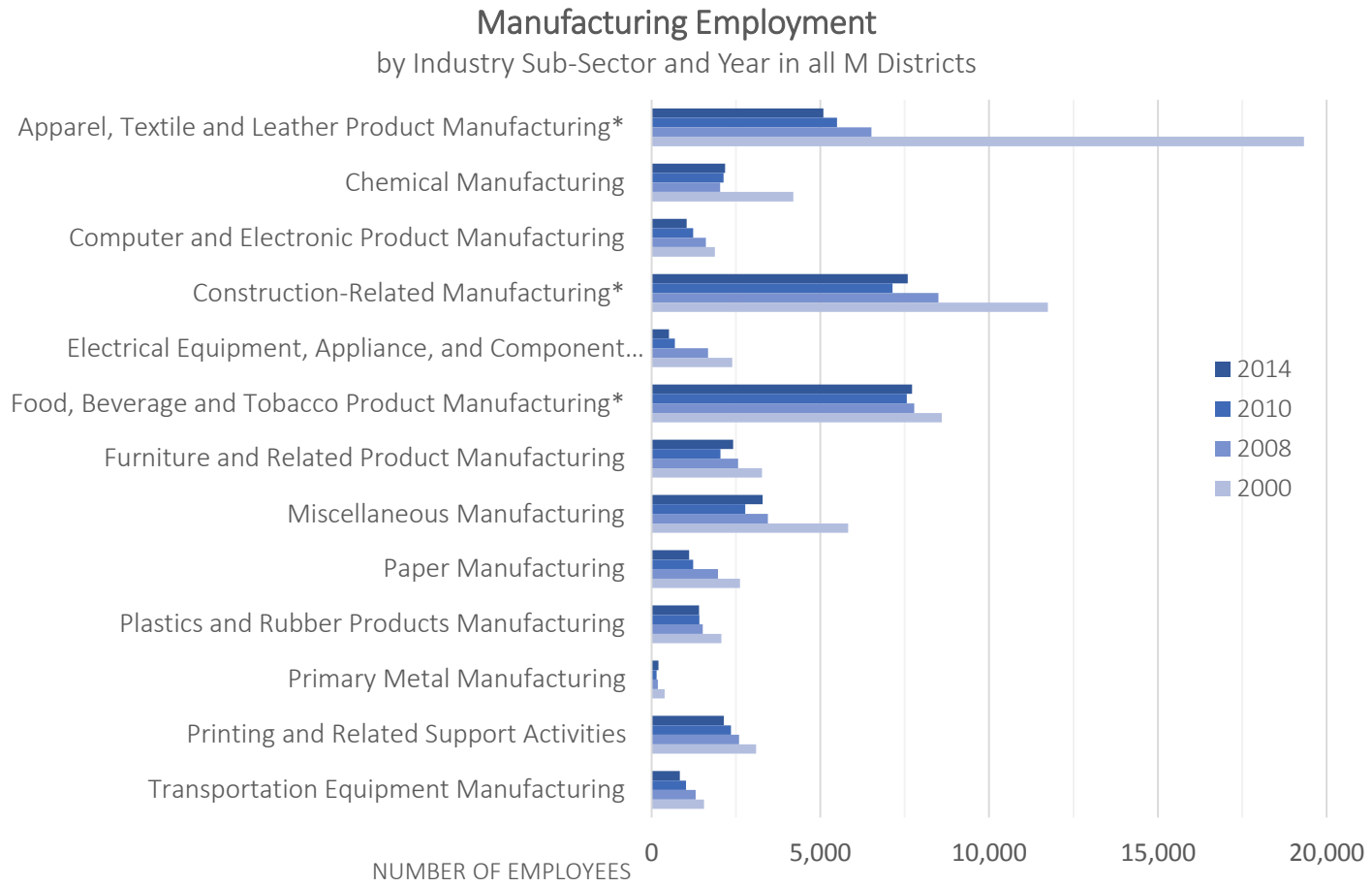
Truck Transportation is concentrated around Newtown Creek and in Hunts Point. In IBZs, firms have become larger on average, with a net growth of 800 employees between 2010 and 2014. In M districts outside IBZs, *Truck Transportation* slightly declined during the same time frame.



Couriers and Express Delivery Services			
		Firms	Employees
IBZ	# in 2014	60	4,218
	Net change since 2010	+5	-361
	Percent change since 2010	+9.1%	-7.9%
other M District	# in 2014	12	1,309
	Net change since 2010	+3	-29
	Percent change since 2010	+33.3%	-2.2%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Couriers and Express Delivery Services are still a large industry in M districts. The industry grew slightly in number of businesses but declined in number of employees. It is present in many M districts, but is concentrated in Maspeth, followed by Zerega, Eastchester and just outside of JFK airport.



**Aggregated Industry Sub-Sector*
Source: NYSDOL QCEW 2000, 2008, 2010, 2014, 3rd quarter.
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

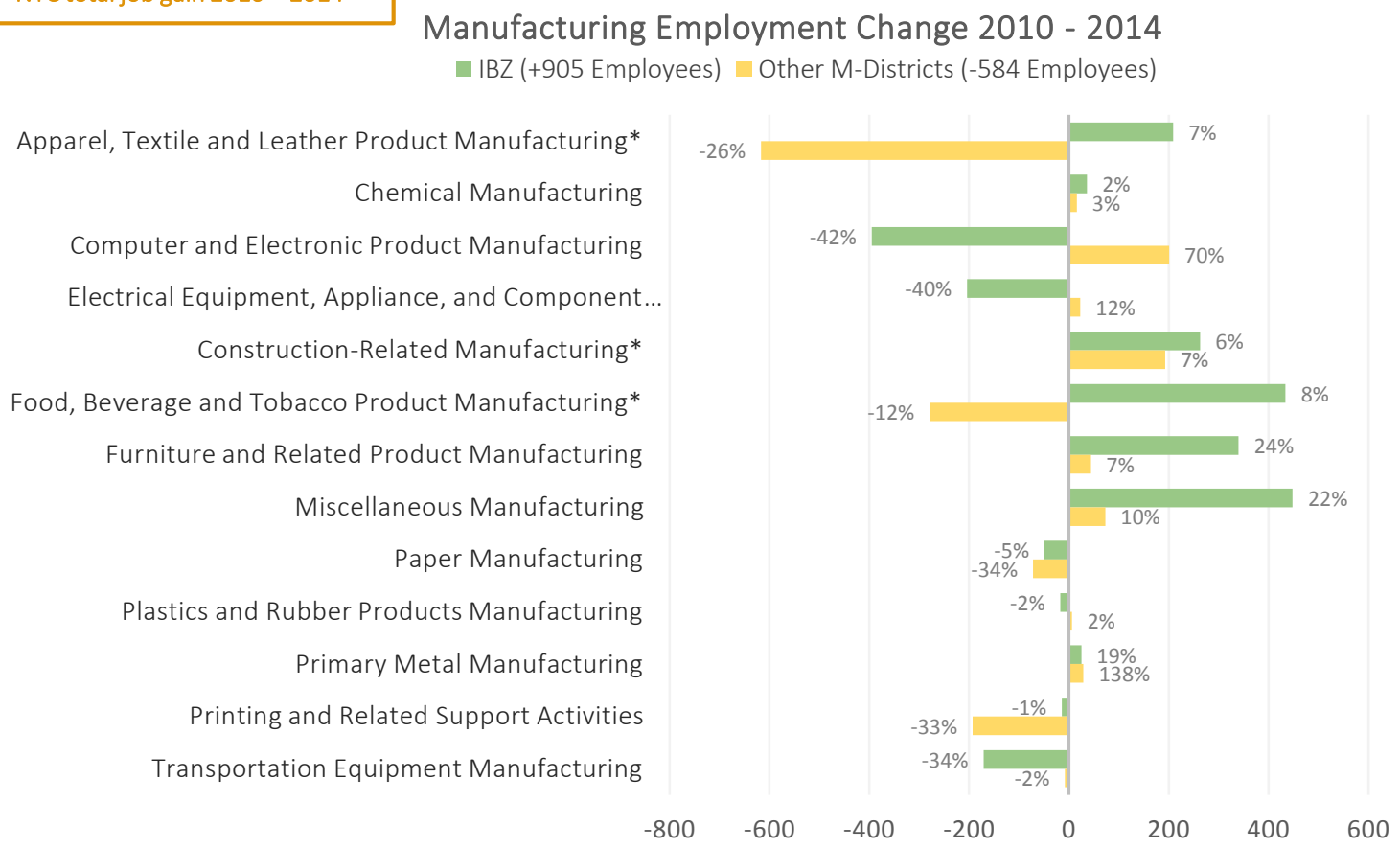
Even after decades of steep employment declines, *Manufacturing* was the largest industrial sector in the year 2000 with almost 70,000 employees in M districts. In 2014, about half of those jobs remained, mainly due to employment losses in apparel manufacturing. Within the *Manufacturing* sector, *Food Manufacturing* is the largest sub-sector in 2014, followed by *Fabricated Metal Product Manufacturing*, here represented within the Construction-related Manufacturing group.

The year 2010 appears to mark a stabilization period for certain manufacturing sub-sectors: *Food Manufacturing, Furniture Manufacturing, Miscellaneous Manufacturing**, and *Construction-related Manufacturing*** have experienced a slight net growth.

* Classified as *Miscellaneous Manufacturing* are jewelry, signs, medical equipment and supplies, toys, games, ornaments, candles, cigarette lighters, tobacco pipes, hair pieces, umbrellas, etc.

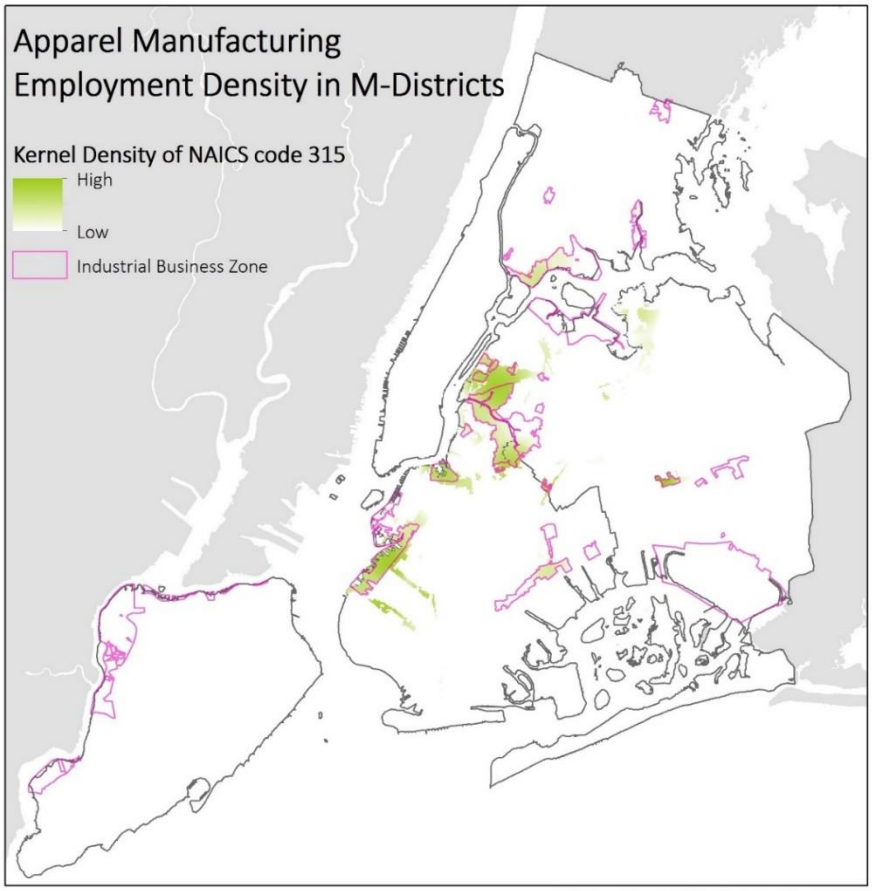
** *Construction-related Manufacturing* includes *Fabricated Metal Product Manufacturing, Machinery Manufacturing, Nonmetallic Mineral Product Manufacturing, Wood Product Manufacturing* and *Petroleum and Coal Products Manufacturing*

Manufacturing in M-Zones outside Manhattan accounted for 0.08% of NYC total job gain 2010 – 2014



Aggregated Industry Sub-Sector
Source: NYSDOL QCEW 2000, 2008, 2010, 2014, 3rd quarter.
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Between 2010 and 2014, most *Manufacturing* sub-sectors fared slightly better in IBZs than in other M districts, except for *Computer and Electronic Product Manufacturing* and *Electrical Equipment, Appliance and Component Manufacturing*. However, *Manufacturing* employment gains in M districts were overall very marginal (+321 jobs), representing 0.08 percent of the citywide employment gain during the same time frame.



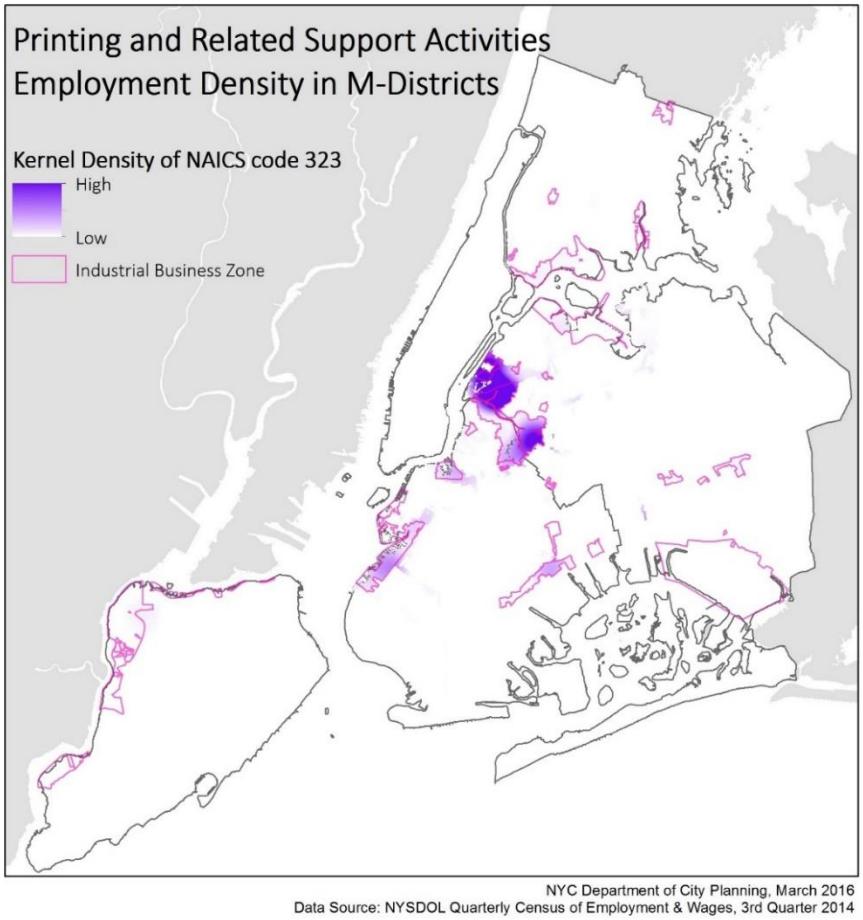
NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

Apparel Manufacturing			
		Firms	Employees
IBZ	# in 2014	124	2776
	Net change since 2010	+7	+278
	Percent change since 2010	5.6%	11.1%
other M-District	# in 2014	118	1,475
	Net change since 2010	-23	-604
	Percent change since 2010	-19.5%	-29.1%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

The following slides take a more detailed look at NYC's legacy manufacturing sectors: apparel, printing and construction-related manufacturing. *Food Manufacturing* already figured on slide 17. The methodology described on slide 14 was equally applied for the legacy manufacturing maps.

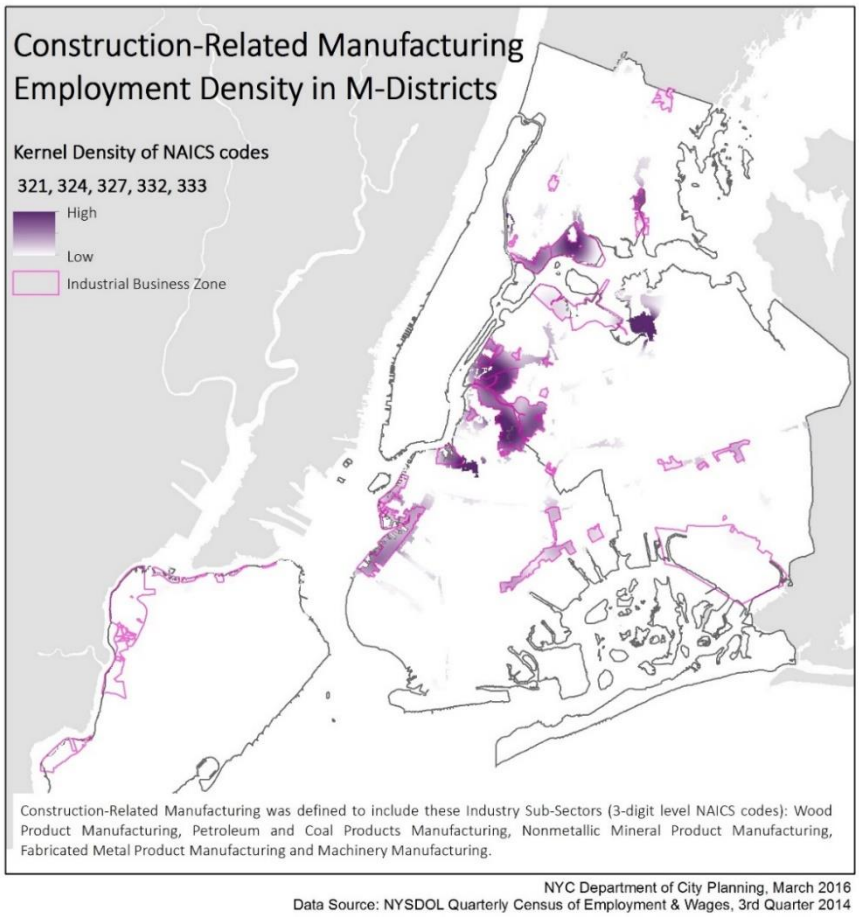
Outside Manhattan, the *Apparel Manufacturing* industry is concentrated in Long Island City, Sunset Park including the M-Zones outside the IBZ, the Navy Yard, East Williamsburg and Ozone Park (western Jamaica IBZ). The industry has experienced a net decline since 2010, although both the number of firms and employees slightly increased in IBZs.



Printing and Related Support Activities			
		Firms	Employees
IBZ	# in 2014	95	1,759
	Net change since 2010	-1	-14
	Percent change since 2010	-1.0%	-0.8%
other M-District	# in 2014	41	387
	Net change since 2010	-3	-193
	Percent change since 2010	-6.8%	-33.3%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Printing and Related Support Activities is overwhelmingly concentrated in the Long Island City and Maspeth IBZs. The number of firms decreased only slightly; however the number of employees declined by over one third in M districts outside of IBZs.



NYC Department of City Planning, March 2016
Data Source: NYSDOL Quarterly Census of Employment & Wages, 3rd Quarter 2014

Construction-related Manufacturing		Firms	Employees
IBZ	# in 2014	253	4,566
	Net change since 2010	-10	+263
	Percent change since 2010	-3.8%	6.1%
other M-District	# in 2014	160	3,028
	Net change since 2010	-6	+193
	Percent change since 2010	-3.6%	6.8%

Source: NYSDOL QCEW 2010, 2014, 3rd quarter
Analysis excludes M districts in Manhattan, paired M districts, and airport properties

Construction-related Manufacturing, comprising *Fabricated Metal Product Manufacturing, Machinery Manufacturing, Nonmetallic Mineral Product Manufacturing, Wood Product Manufacturing* and *Petroleum and Coal Products Manufacturing,* is present in most M districts, with heavy concentrations in College Point and Wallabout, followed by Long Island City, East Williamsburg, Hunts Point and Zerega. The average size of businesses increased between 2010 and 2014, with a loss of firms but a gain in employment.

- M districts outside Manhattan experienced an overall gain in firms and employment since the year 2000. Non-industrial jobs grew consistently and at a higher rate than industrial employment. Yet, industrial employment is still relevant, especially in IBZs (68 percent in 2014). Net industrial employment was lower in 2014 than it was in 2000, but has followed an upward trend since 2010.
- Industrial growth has occurred along with significantly larger growth in non-industrial employment, in the context of a healthy local economy and an increase in population. The growing industrial sectors are tied to the local economy and not to national or global markets.
- IBZ-designated M districts have a higher share of industrial-sector employment than other M districts. Between 2010 and 2014, industrial and non-industrial jobs grew at the same rate in IBZs, whereas M districts became less industrial.
- The largest industrial-sector industries in M districts outside Manhattan are *Specialty Trade Contractors*, *Grocery Wholesale* and *School and Employee Bus Transportation*. Those industries also grew between 2010 and 2014, although there are differences between IBZs and other M districts. Many of the large and growing industries are truck-intensive.
- As in the preceding decades, *Manufacturing* declined strongly between 2000 and 2010 in M districts outside Manhattan. Since 2010, select manufacturing sub-sectors *(Food Manufacturing, Furniture Manufacturing* and *Construction-related Manufacturing*) have stabilized.
- NYC has an 'IBZ core' around Newtown Creek, centrally located and accessible to the regional highway network. The area is home to 43 percent of all industrial employment in IBZs and 41 percent of all employment in IBZs.

BLS Bureau of Labor Statistics (2014). *Quarterly Census of Employment and Wages, Overview.* Retrieved from http://www.bls.gov/cew/cewover.htm

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NYC Office of the Mayor (2015). *Mayor de Blasio and Speaker Mark-Viverito Unveil Action Plan to Grow 21st Century Industrial and Manufacturing Jobs in NYC*. Retrieved from http://www1.nyc.gov/office-of-the-mayor/news/780-15/mayor-de-blasio-speaker-mark-viverito-action-plan-grow-21st-century-industrial-and#/0

NYSDOL New York State Department of Labor (2012). *Long-Term Industry Employment Projections 2012 – 2022, New York City*, Retrieved from https://www.labor.ny.gov/stats/lsproj.shtm

NYSFILM New York State Governor's Office of Motion Picture and Television Development (2015). *Tax Incentives*. Retrieved from http://www.nylovesfilm.com/tax-incentives.php

US United States Census Bureau (n.d.). *North American Industry Classification System.* Retrieved from http://www.census.gov/eos/www/naics/

NAICS 3-digit code	Primary Industry	Industry Sub-Sector	Classification
111	Agriculture, Forestry, Fishing and Hunting	Crop Production	Non-Industrial
112		Animal Production	Non-Industrial
113		Forestry and Logging	Non-Industrial
114		Fishing, Hunting and Trapping	Non-Industrial
115		Support Activities for Agriculture and Forestry	Non-Industrial
211	Utilities	Oil and Gas Extraction	Non-Industrial
212		Mining (except Oil and Gas)	Non-Industrial
213		Support Activities for Mining	Non-Industrial
221		Utilities	Industrial
236	Construction	Construction of Buildings	Industrial
237		Heavy and Civil Engineering Construction	Industrial
238		Specialty Trade Contractors	Industrial
311	Manufacturing	Food Manufacturing	Industrial
312		Beverage and Tobacco Product Manufacturing	Industrial
313		Textile Mills	Industrial
314		Textile Product Mills	Industrial
315		Apparel Manufacturing	Industrial
316		Leather and Allied Product Manufacturing	Industrial
321		Wood Product Manufacturing	Industrial
322		Paper Manufacturing	Industrial
323		Printing and Related Support Activities	Industrial
324		Petroleum and Coal Products Manufacturing	Industrial
325		Chemical Manufacturing	Industrial
326		Plastics and Rubber Products Manufacturing	Industrial
327		Nonmetallic Mineral Product Manufacturing	Industrial
331		Primary Metal Manufacturing	Industrial
332		Fabricated Metal Product Manufacturing	Industrial
333		Machinery Manufacturing	Industrial
334		Computer and Electronic Product Manufacturing	Industrial
335		Electrical Equipment, Appliance, and Component Manufacturing	Industrial
336		Transportation Equipment Manufacturing	Industrial
337		Furniture and Related Product Manufacturing	Industrial
339		Miscellaneous Manufacturing	Industrial
423	Wholesale Trade	Merchant Wholesalers, Durable Goods	Industrial
424		Merchant Wholesalers, Nondurable Goods	Industrial
425		Wholesale Electronic Markets and Agents and Brokers	Industrial
441	Retail Trade	Motor Vehicle and Parts Dealers	Industrial
442		Furniture and Home Furnishings Stores	Non-Industrial
443		Electronics and Appliance Stores	Non-Industrial
444		Building Material and Garden Equipment and Supplies Dealers	Non-Industrial
445		Food and Beverage Stores	Non-Industrial
446		Health and Personal Care Stores	Non-Industrial
447		Gasoline Stations	Industrial
448		Clothing and Clothing Accessories Stores	Non-Industrial
451		Sporting Goods, Hobby, Book, and Music Stores	Non-Industrial
452		General Merchandise Stores	Non-Industrial
453		Miscellaneous Store Retailers	Non-Industrial
454		Nonstore Retailers	Non-Industrial

NAICS 3-digit code	Primary Industry	Industry Sub-Sector	Classification
481	Transportation and Warehousing	Air Transportation	Industrial
482		Rail Transportation	Industrial
483		Water Transportation	Industrial
484		Truck Transportation	Industrial
485		Transit and Ground Passenger Transportation	Industrial
486		Pipeline Transportation	Industrial
487		Scenic and Sightseeing Transportation	Industrial
488		Support Activities for Transportation	Industrial
491		Postal Service	Industrial
492		Couriers and Messengers	Industrial
493		Warehousing and Storage	Industrial
511	Information	Publishing Industries (except Internet)	Non-Industrial
512		Motion Picture and Sound Recording Industries	Industrial
515		Broadcasting (except Internet)	Non-Industrial
517		Telecommunications	Industrial
518		Data Processing, Hosting and Related Services	Non-Industrial
519		Other Information Services	Non-Industrial
521	Finance and Insurance	Monetary Authorities-Central Bank	Non-Industrial
522		Credit Intermediation and Related Activities	Non-Industrial
523		Securities, Commodity Contracts, and Other Financial Investments and Related Activities	Non-Industrial
524		Insurance Carriers and Related Activities	Non-Industrial
525		Funds, Trusts, and Other Financial Vehicles	Non-Industrial
531	Real Estate and Rental and Leasing	Real Estate	Non-Industrial
532		Rental and Leasing Services	Non-Industrial
533		Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	Non-Industrial
541	Professional, Scientific, and Technical Services	Professional, Scientific, and Technical Services	Non-Industrial
551	Management of Companies and Enterprises	Management of Companies and Enterprises	Non-Industrial
561	Administrative and Support and Waste Management and Remediation Services	Administrative and Support Services	Non-Industrial
562		Waste Management and Remediation Services	Industrial
611	Educational Services	Educational Services	Non-Industrial
621	Health Care and Social Assistance	Ambulatory Health Care Services	Non-Industrial
622		Hospitals	Non-Industrial
623		Nursing and Residential Care Facilities	Non-Industrial
624		Social Assistance	Non-Industrial
711	Arts, Entertainment, and Recreation	Performing Arts, Spectator Sports, and Related Industries	Non-Industrial
712		Museums, Historical Sites, and Similar Institutions	Non-Industrial
713		Amusement, Gambling, and Recreation Industries	Non-Industrial
721	Accommodation and Food Services	Accommodation	Non-Industrial
722		Food Services and Drinking Places	Non-Industrial
811	Other Services (except Public Administration)	Repair and Maintenance	Industrial
812		Personal and Laundry Services	Non-Industrial
813		Religious, Grantmaking, Civic, Professional, and Similar Organizations	Non-Industrial
814		Private Households	Non-Industrial
921	Public Administration	Executive, Legislative, and Other General Government Support	Non-Industrial
922		Justice, Public Order, and Safety Activities	Non-Industrial
923		Administration of Human Resource Programs	Non-Industrial
924		Administration of Environmental Quality Programs	Non-Industrial
925		Administration of Housing Programs, Urban Planning, and Community Development	Non-Industrial
926		Administration of Economic Programs	Non-Industrial
927		Space Research and Technology	Non-Industrial
928		National Security and International Affairs	Non-Industrial
999	Unclassified	Unclassified	Unclassified

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