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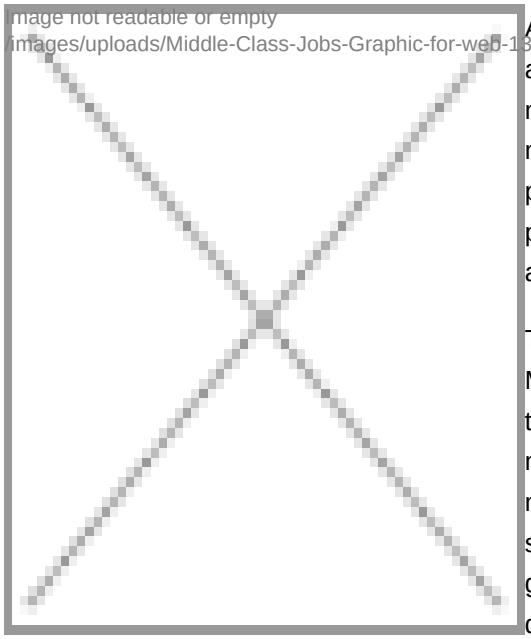
Data - November 2015

Manufacturing in NYC: A Snapshot

This data analysis, the inaugural publication of the Center for an Urban Future's Middle Class Jobs Project, provides a new level of detail about New York City's manufacturing sector. It reveals that the city has gained nearly 1,000 manufacturing jobs since 2011, reversing a long decline, and documents which manufacturing subsectors in the five boroughs are growing the fastest.

by Jonathan Bowles

Earlier this month, Mayor de Blasio and City Council Speaker Mark-Viverito announced a new action plan to bolster New York City's industrial and manufacturing sector. The plan is promising for several reasons. For one, it is a welcome attempt to support a sector which has long been a critical source of middle income jobs for New Yorkers, but which also faces a number of challenges. Additionally, the plan comes at an opportune moment: following a decade in which the city lost an average of 9,600 manufacturing jobs a year, the city's manufacturing sector has stabilized and begun to grow again.



As this analysis demonstrates, between 2011 and 2014 the sector experienced a net gain of nearly 1,000 jobs. Even more encouraging, five different manufacturing subsectors had employment growth during this period: food manufacturing, fabricated metal product manufacturing, furniture and related product manufacturing, non-metallic mineral product manufacturing, and plastics and rubber product manufacturing. In recent years, New York City actually has out-performed the rest of the state in manufacturing growth.

This data brief—the inaugural publication of the Center for an Urban Future's Middle Class Jobs Project, a research initiative supported by Fisher Brothers that will include a series of reports detailing opportunities to create and preserve middle income jobs in New York—provides a detailed snapshot of the city's manufacturing sector. It takes a close look at trends in the 13 manufacturing subsectors that have at least 1,000 jobs in the five boroughs, detailing which are growing the fastest, which pay the highest wages and which comprise a disproportionately large share of jobs statewide. Our major findings include:

- Over the last 3 years, New York City has outpaced the state in manufacturing job creation. Between 2011 and 2014, the city registered a net gain of 880 manufacturing jobs (a 1.2 percent increase) while the state lost 6,615 manufacturing jobs (a 1.4 percent decline).

- In 2014, food manufacturing became New York City's largest manufacturing sector, with a total of 16,368 jobs. It surpassed apparel manufacturing, which for several generations had been the largest production sector. The number of apparel manufacturing jobs in the five boroughs has plunged from 57,178 in 2000 to 15,657 jobs in 2014.

- In 2000, apparel manufacturing accounted for 33.2 percent of all manufacturing jobs in the city and foodmanufacturing accounted for 8.9 percent. In 2014, food accounted for 21.6 percent and apparel 20.7 percent.

- Between 2011 and 2014, five manufacturing sectors in the city experienced a net gain in jobs:

    - Food manufacturing +1,963 (a 13.6 % increase)
    - Fabricated Metal Product Manufacturing +451 (7.7 %)
    - Furniture & Related Product Manufacturing +244 (7.7 %)
    - Nonmetallic Mineral Product Manufacturing +153 (10.6 %)
    - Plastics & Rubber Product Manufacturing +33 (2.0 %)

- Between 2011 and 2014, eight manufacturing sectors in the city experienced a net loss in jobs:

    - Apparel Manufacturing - 679 (-4.2 %)
    - Chemical Manufacturing - 436 (-13.2 %)
    - Printing & Related Support Activities - 274 (-4.3 %)
    - Textile Mills - 250 (-17.6 %)
    - Computer & Electronic Product Manufacturing - 246 (-8.5 %)
    - Transportation Equipment Manufacturing - 240 (-18.0 %)
    - Paper Manufacturing - 116 (-8.0 %)

    - Machinery Manufacturing - 110 (-7.5 %)

- Only four manufacturing sectors have at least 5,000 jobs in New York City, down from seven in 2000. The sectorswith the most manufacturing jobs in the five boroughs are:

    - Food Manufacturing 16,368
    - Apparel Manufacturing 15,657
    - Fabricated Metal Product Manufacturing 6,334
    - Printing & Related Support Activities 6,153
    - Furniture & Related Product Manufacturing 3,433

- Over the last decade (2004 – 2014), food manufacturing was the only manufacturing sector with a net gain in employment. It experienced a 17.7 percent increase in jobs. Employment was down by at least 19 percent in every other manufacturing sector with at least 1,000 jobs in the five boroughs.

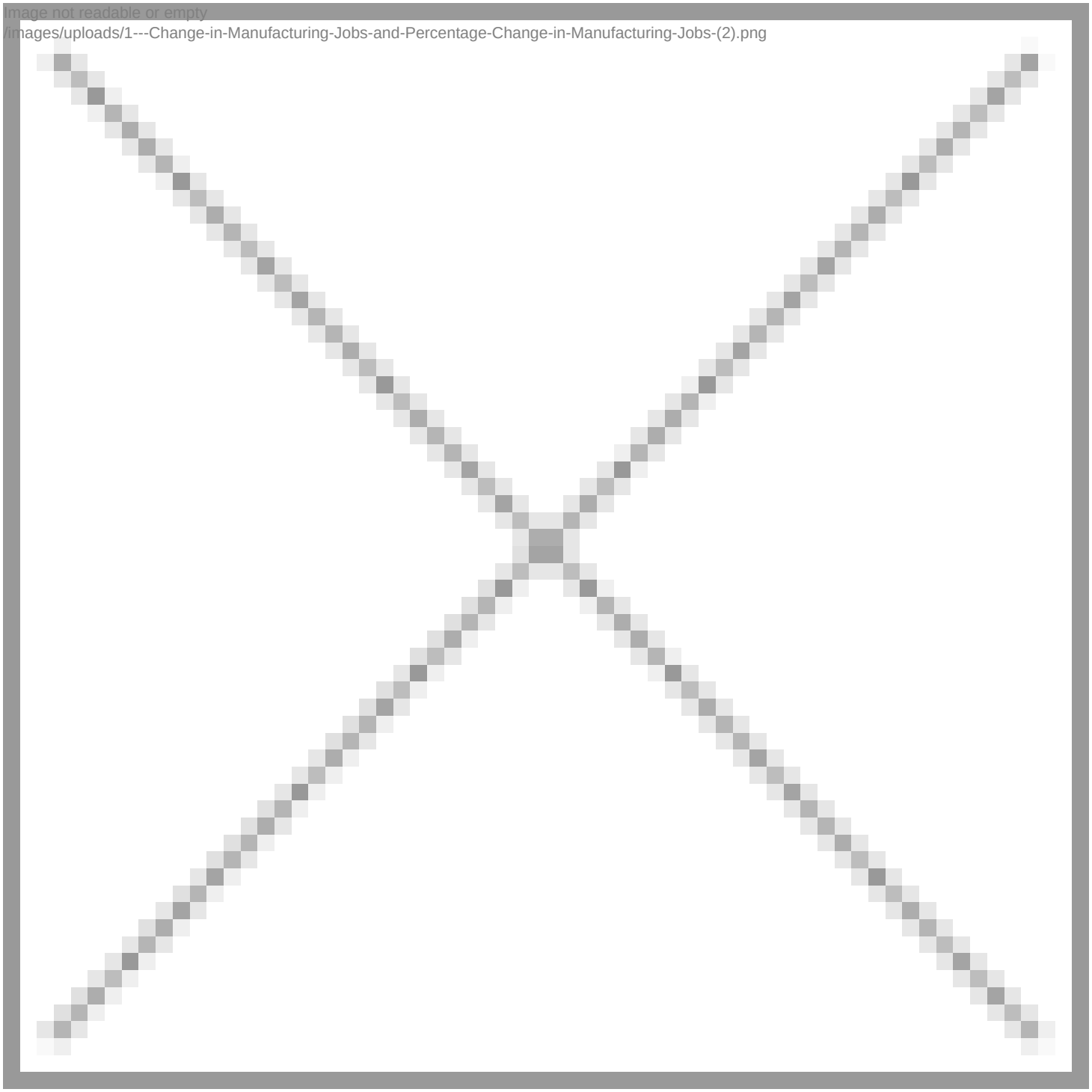
- In five manufacturing sectors, New York City is home to at least a quarter of all jobs statewide. They are:

    - Apparel Manufacturing 84.7 % of the state's jobs are in NYC
    - Textile Mills 31.8 %
    - Food Manufacturing 31.0 %
    - Printing & Related Support Activities 29.0 %
    - Furniture & Related Product Manufacturing 26.0 %

- The fastest growing manufacturing sector, food manufacturing, is also the one that pays the lowest wages. The average annual wage in the city's food manufacturing industry is $32,882, which is nearly 40 percent lower than average manufacturing wage in New York City ($54,028). Of the 13 leading manufacturing sectors that we examined for this report, food manufacturing is the only one with an annual wage under $42,000, and one of just three sectors with an average wage under $50,000.

- The city's six best-paying manufacturing sectors all experienced a net loss in jobs between 2011 and 2014.

- In 2014, the manufacturing industry accounted for just 2.2 percent of all private sector jobs in New York City, down from 5.6 percent in 2000.


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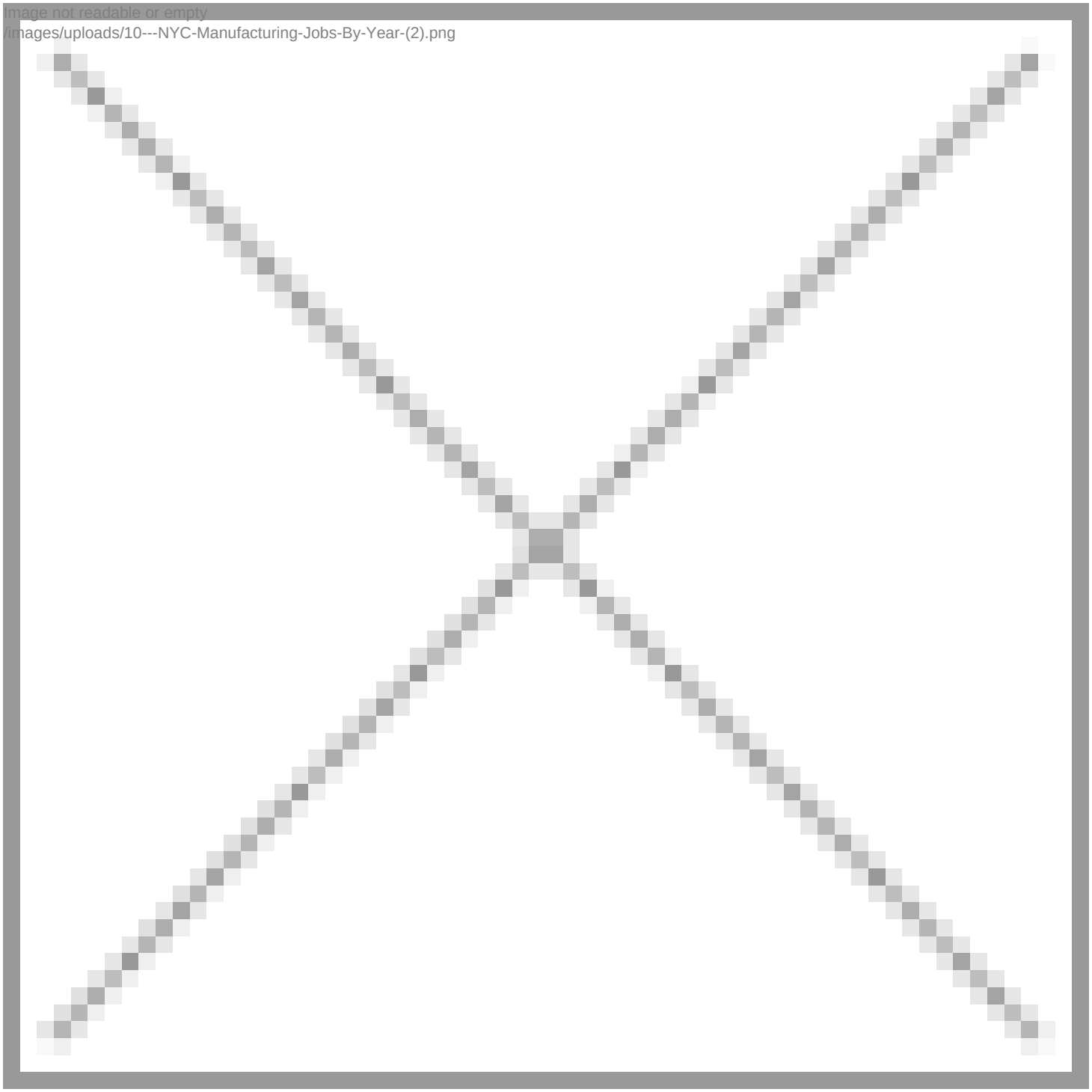
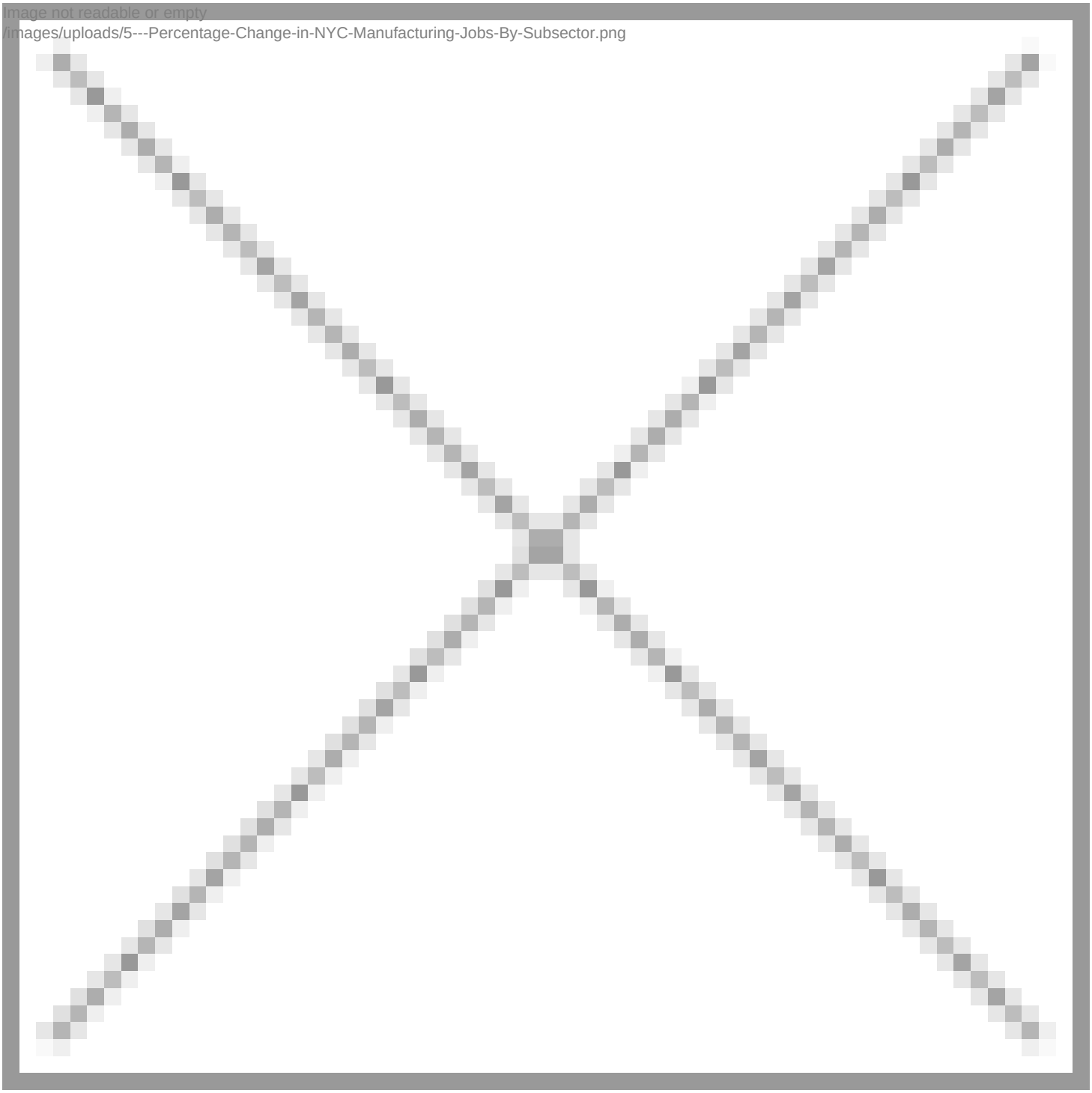

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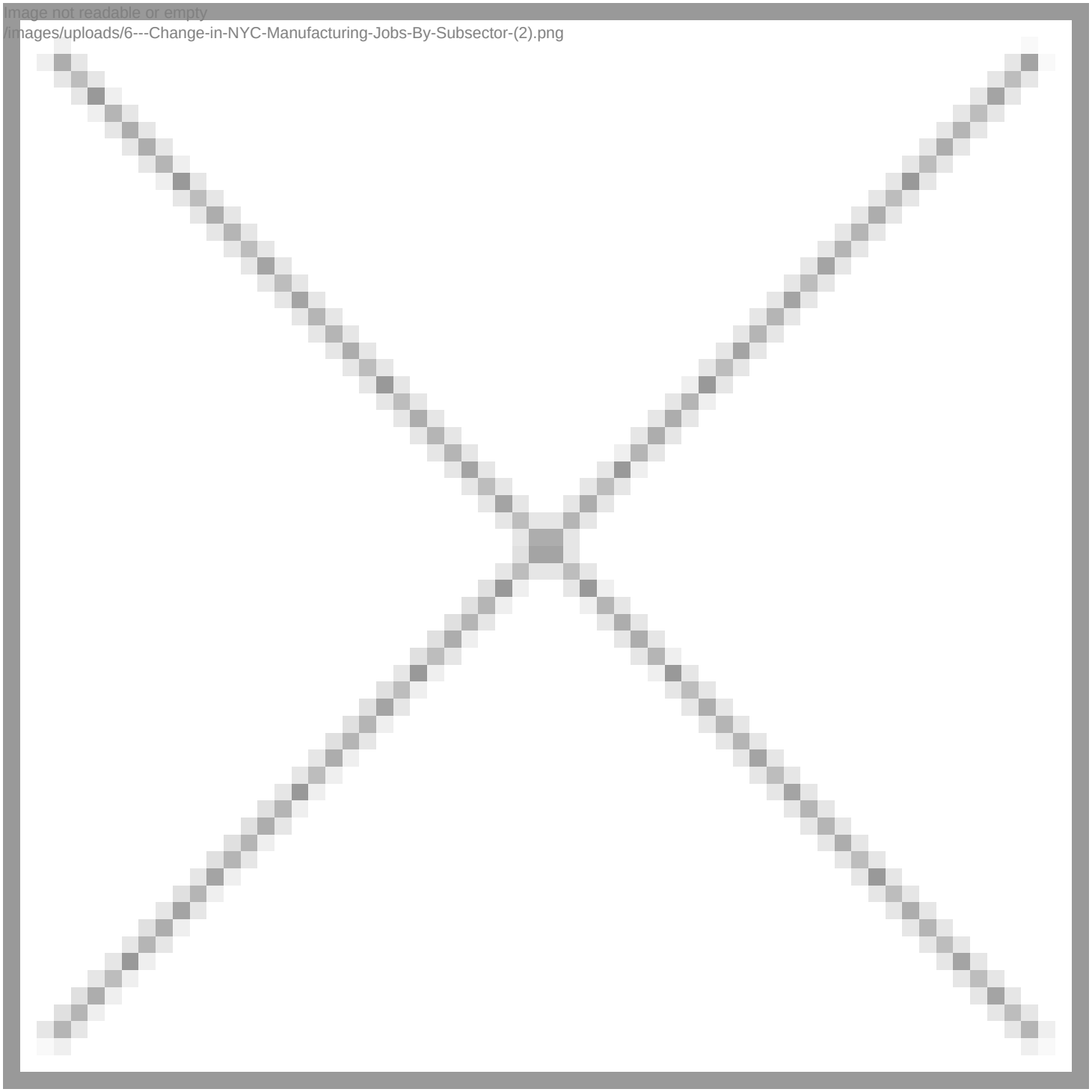
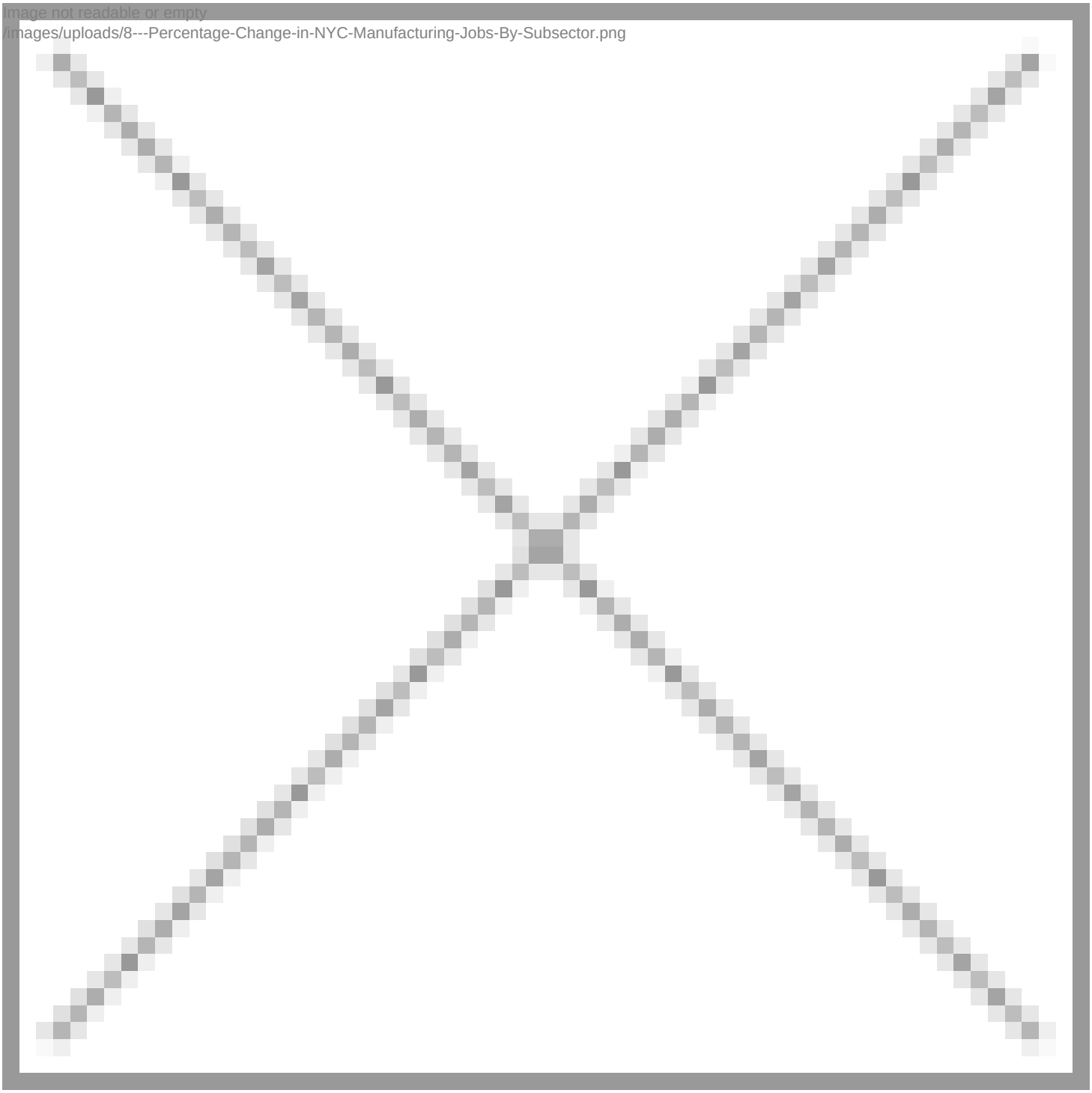

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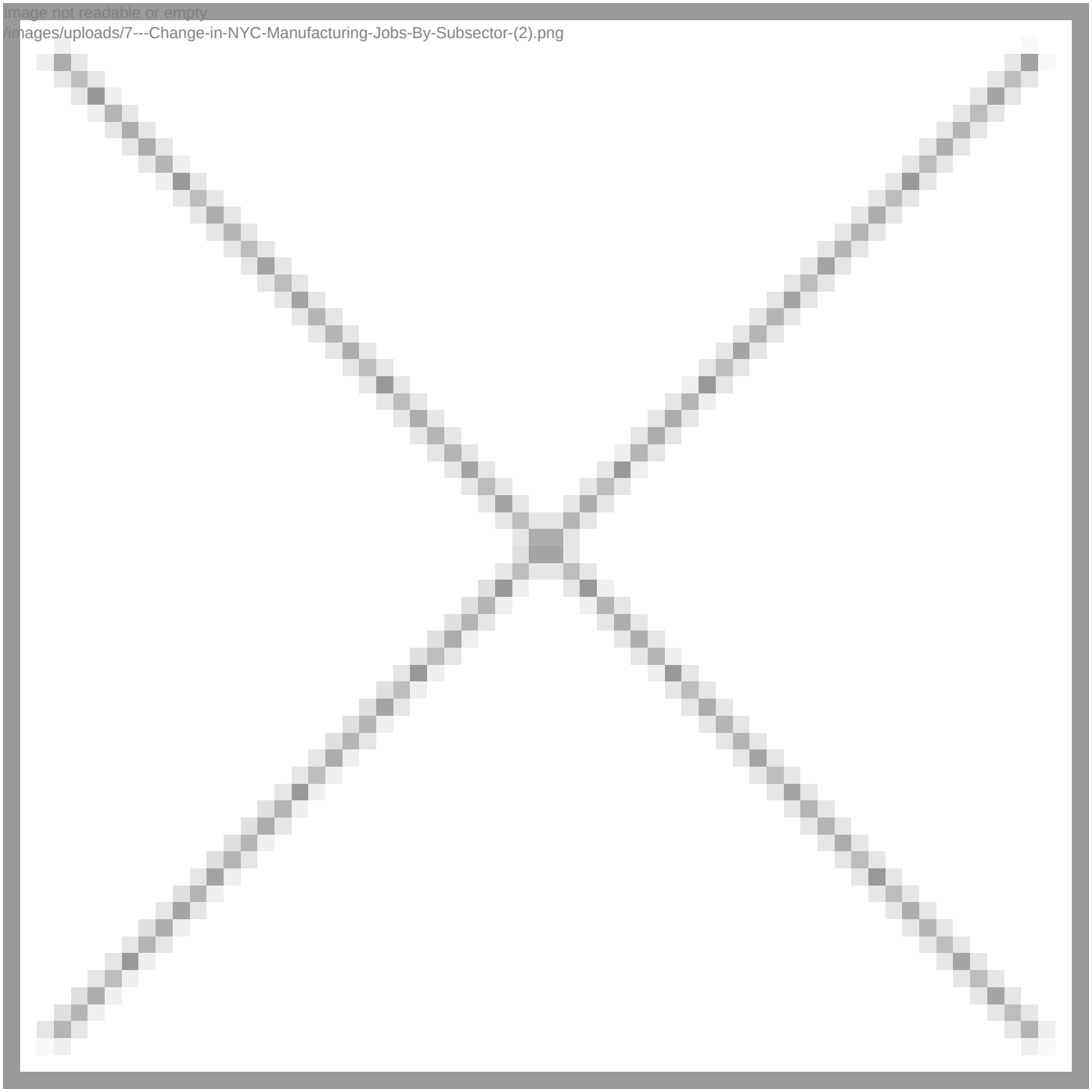
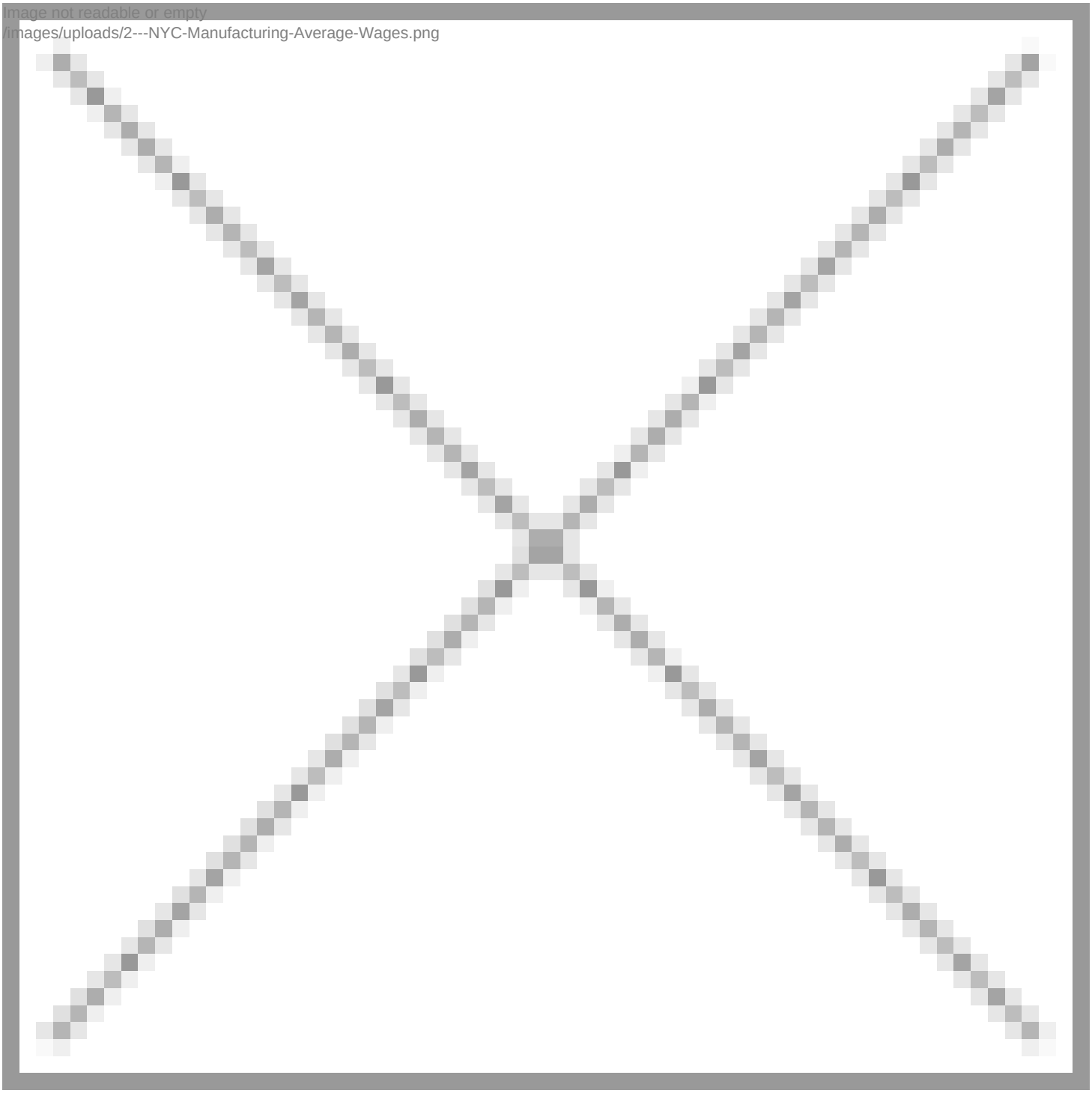
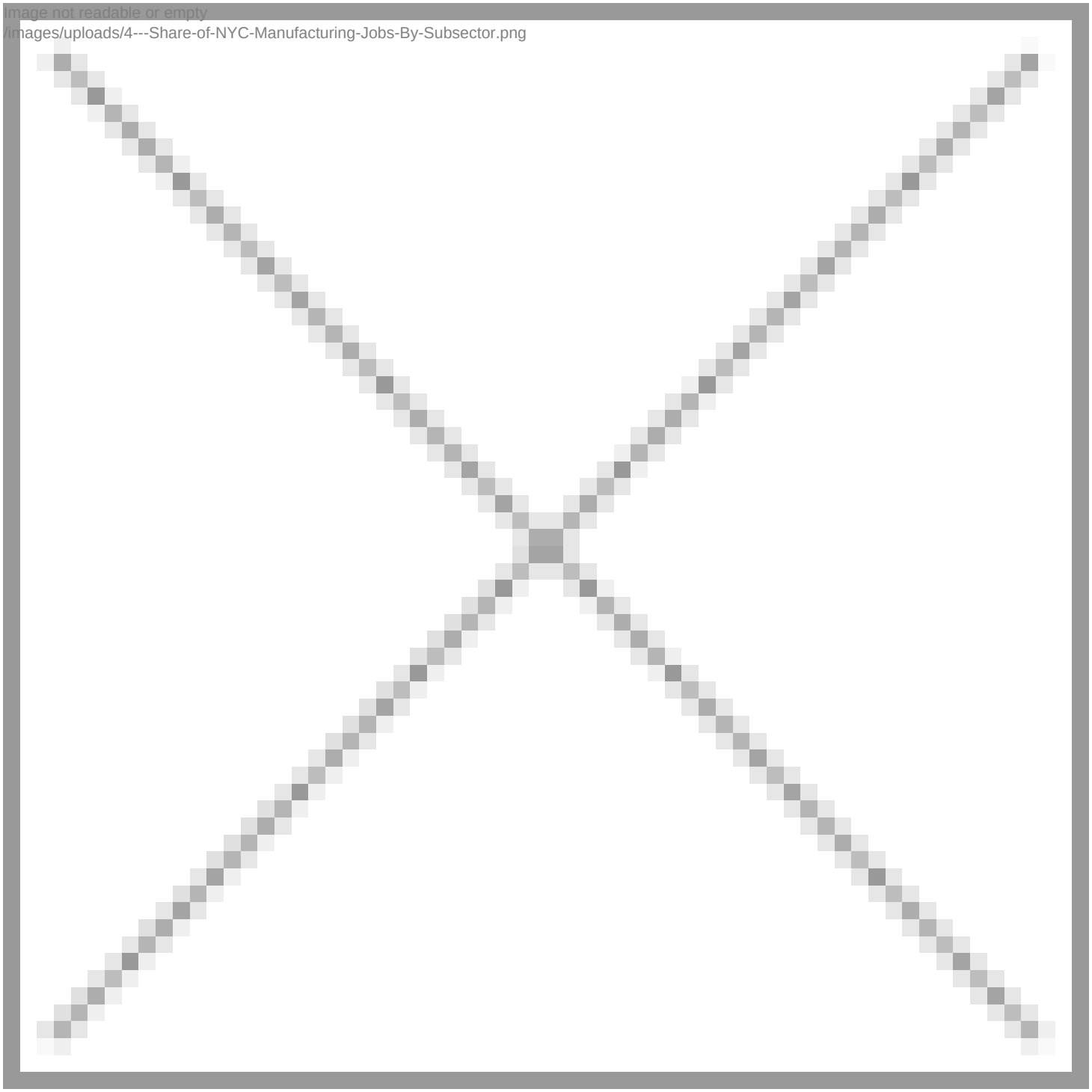
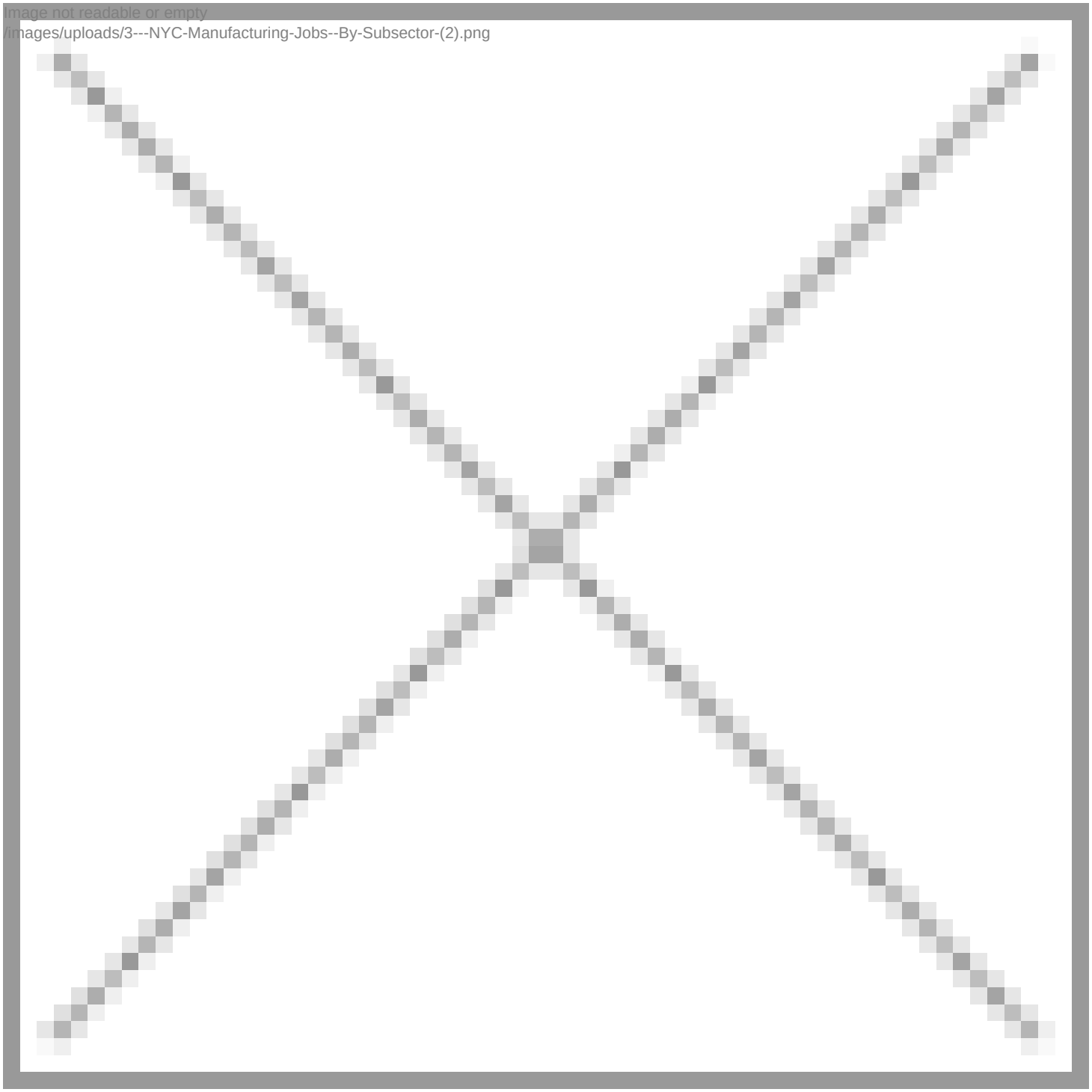

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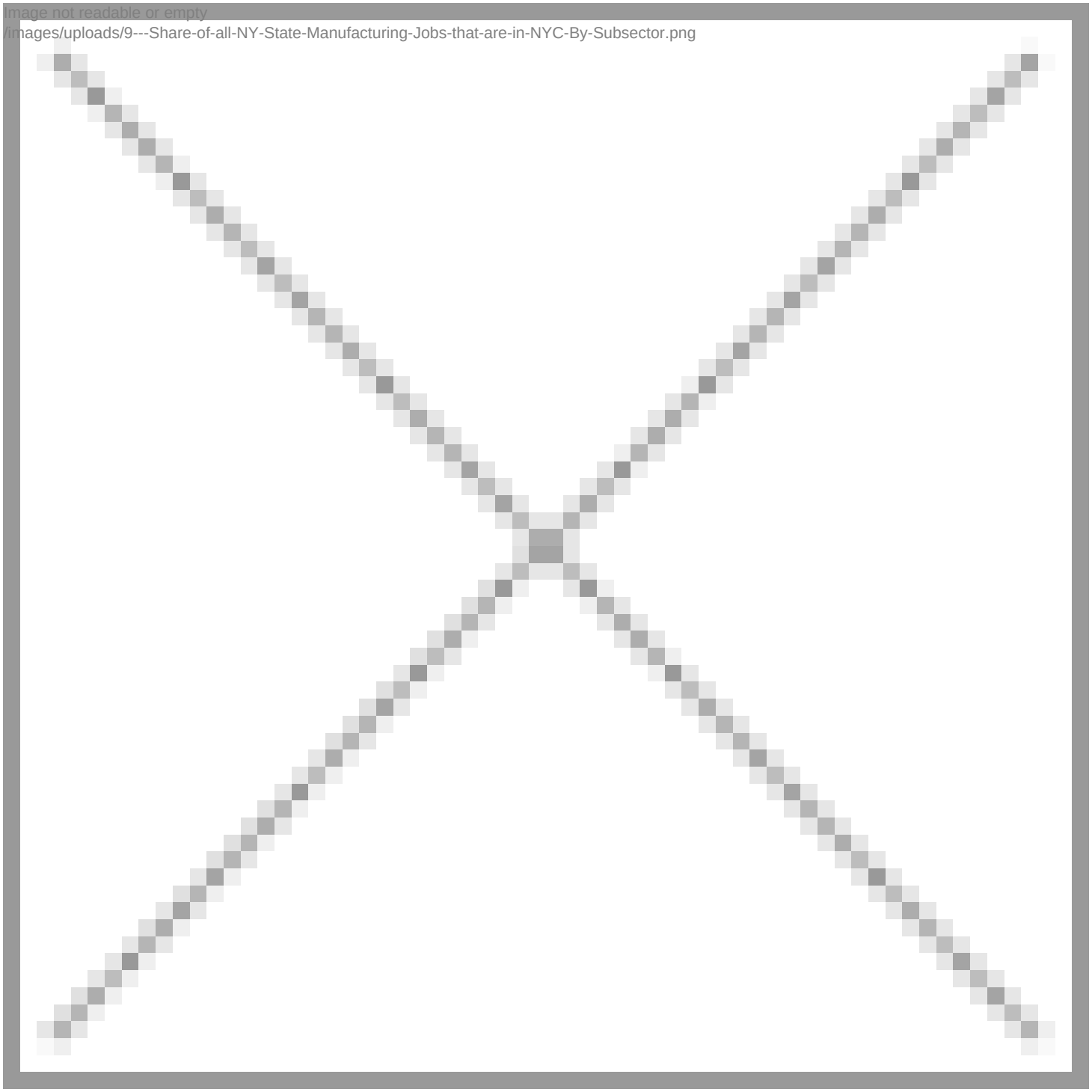
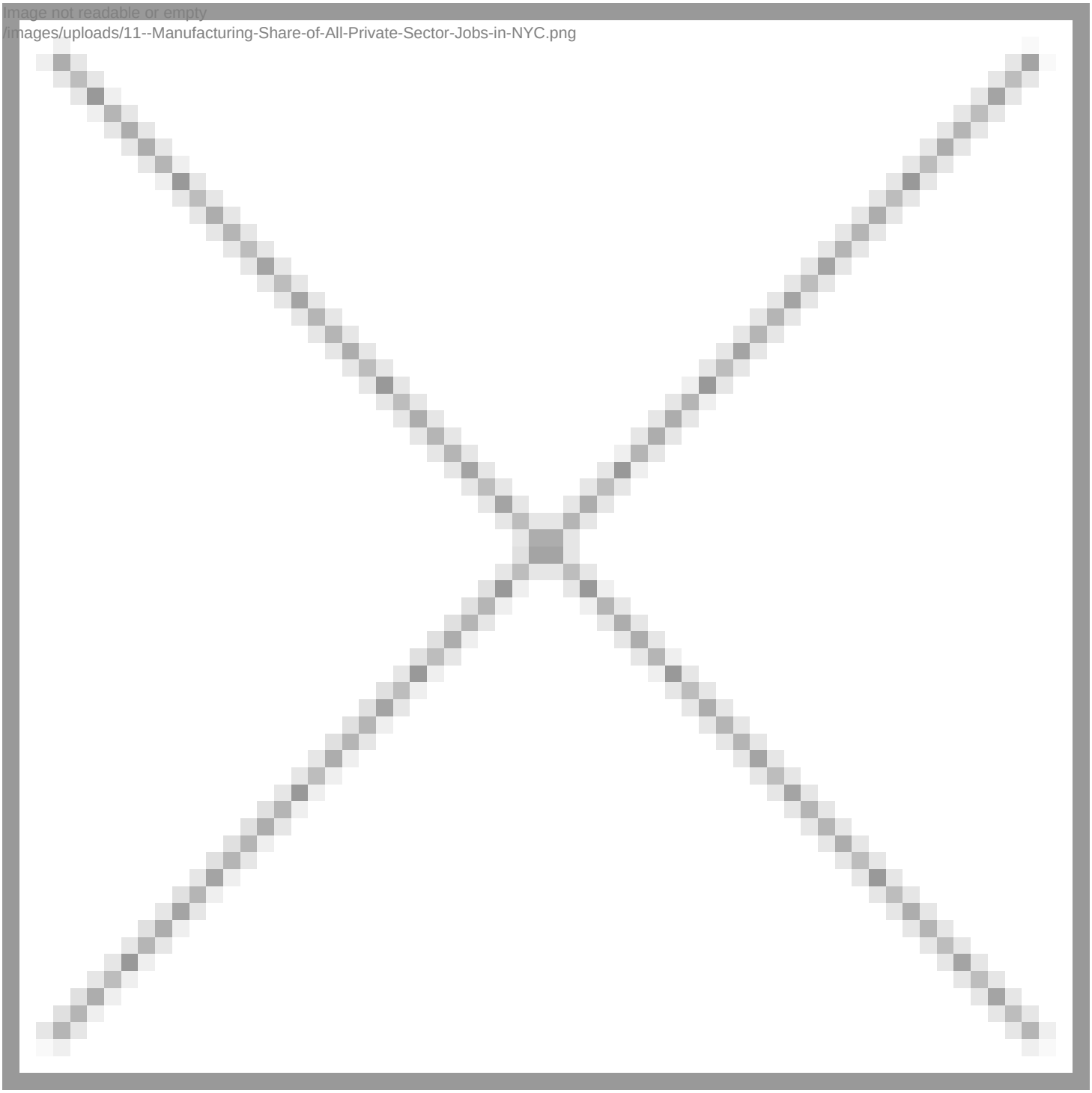

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New York City Manufacturing Employment, 2000 - 2014						
	2014	2013	2012	2011	2004	2000
Manufacturing - All	75,654	75,860	75,940	74,774	119,787	172,266
Food Manufacturing	16,368	15,471	15,400	14,405	13,901	15,365

Apparel Manufacturing	15,657	16,118	16,415	16,336	31,980	57,178
Fabricated Metal Product Manufacturing	6,334	6,313	6,263	5,883	7,944	10,145
Printing & Related Support Activities	6,153	6,656	6,817	6,427	11,717	15,889
Furniture & Related Product Manufacturing	3,433	3,265	3,078	3,189	4,717	5,966
Chemical Manufacturing	2,859	2,926	3,333	3,295	5,403	6,044
Computer & Electronic Product Manufacturing	2,647	2,973	2,796	2,893	3,779	4,794
Plastics & Rubber Products Manufacturing	1,689	1,567	1,594	1,656	2,684	3,424
Nonmetallic Mineral Product Manufacturing	1,599	1,664	1,548	1,446	1,979	2,274
Machinery Manufacturing	1,365	1,373	1,307	1,475	2,596	3,539
Paper Manufacturing	1,325	1,305	1,344	1,441	3,233	4,561
Textile Mills	1,173	1,253	1,324	1,423	3,328	6,742
Transportation Equipment Manufacturing	1,092	1,108	1,106	1,332	2,195	2,416

New York State Manufacturing Employment, 2000 - 2014

	2014	2013	2012	2011	2004	2000
Manufacturing - All	450,192	454,286	456,930	456,807	593,521	745,585
Computer & Electronic Product Manufacturing	56,555	58,446	60,444	61,959	74,293	86,885
Food Manufacturing	52,756	52,521	51,561	49,709	51,932	54,966
Fabricated Metal Product Manufacturing	51,313	51,201	50,932	49,611	57,022	69,268
Machinery Manufacturing	42,089	42,647	43,366	44,402	51,911	68,893
Chemical Manufacturing	38,034	39,882	40,286	40,293	56,739	67,104

Printing & Related Support Activities	21,247	21,731	22,044	22,547	36,739	43,793
Plastics & Rubber Products Manufacturing	20,785	20,614	20,819	20,783	26,681	33,124
Transportation Equipment Manufacturing	20,439	20,077	21,104	22,514	37,469	45,078
Apparel Manufacturing	18,453	19,020	19,630	19,540	37,188	65,182
Paper Manufacturing	16,354	16,594	16,444	16,441	21,250	27,353
Nonmetallic Mineral Product Manufacturing	15,117	15,051	15,057	14,830	17,976	22,635
Furniture & Related Product Manufacturing	13,257	13,285	12,933	12,938	18,701	23,227
Textile Mills	3,692	3,742	3,694	3,851	6,804	11,546

Source: NYS Department of Labor, Quarterly Census of Employment and Wages (QCEW).

Employment figures are annual totals.

This data analysis was written by Jonathan Bowles. Design by Amy Parker.

The data brief is the inaugural publication of the Center for an Urban Future's **Middle Class Jobs Project**, a research initiative generously funded by Fisher Brothers and Winston C. Fisher. In the months ahead, the project will include a series of reports highlighting opportunities to create and preserve middle class jobs in New York.

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