

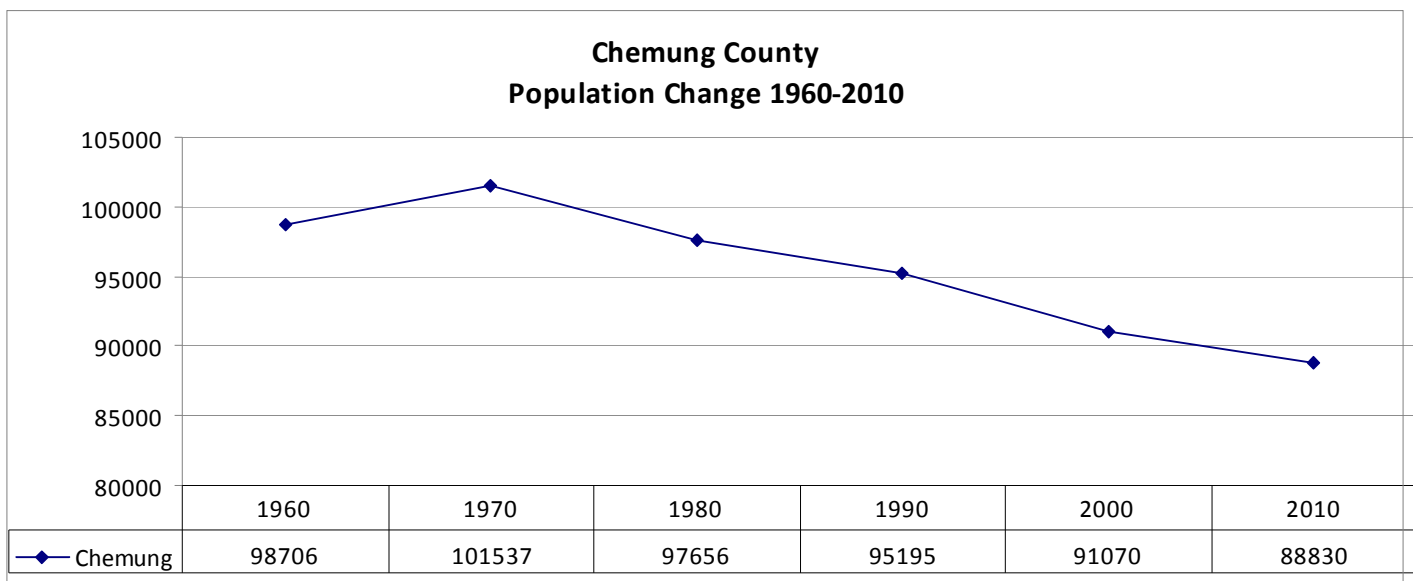
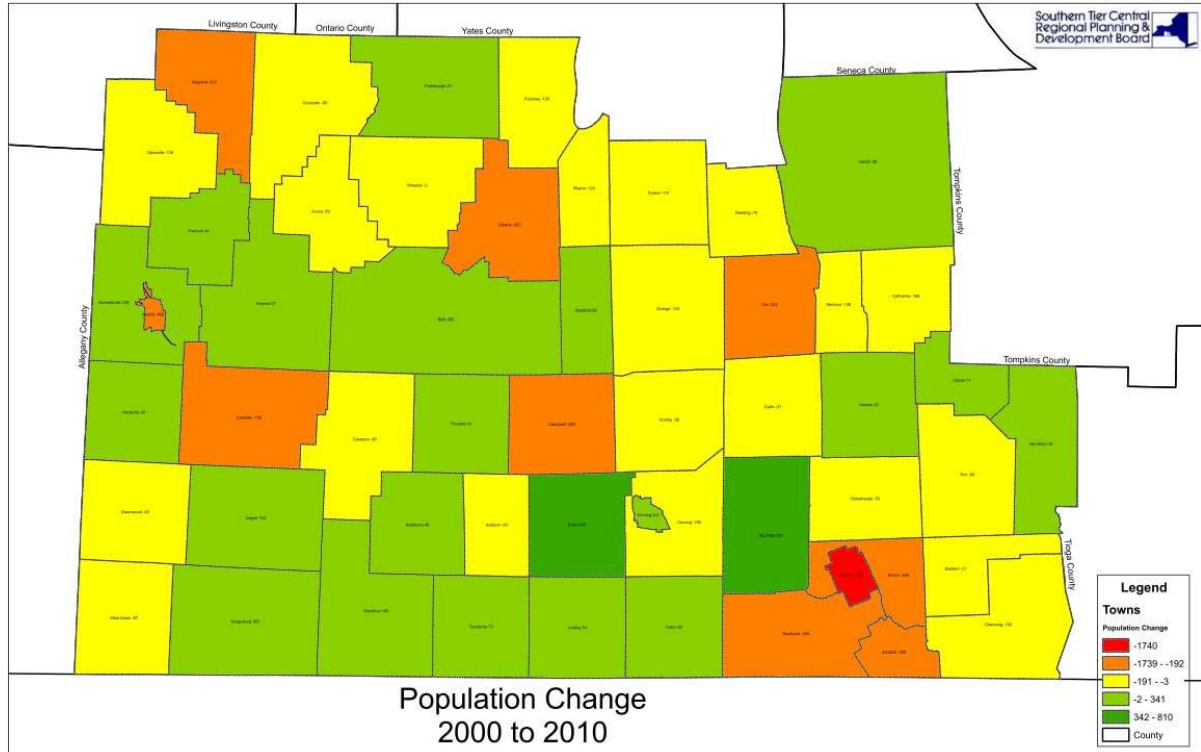
Southern Tier Central

REGIONAL PLANNING & DEVELOPMENT BOARD

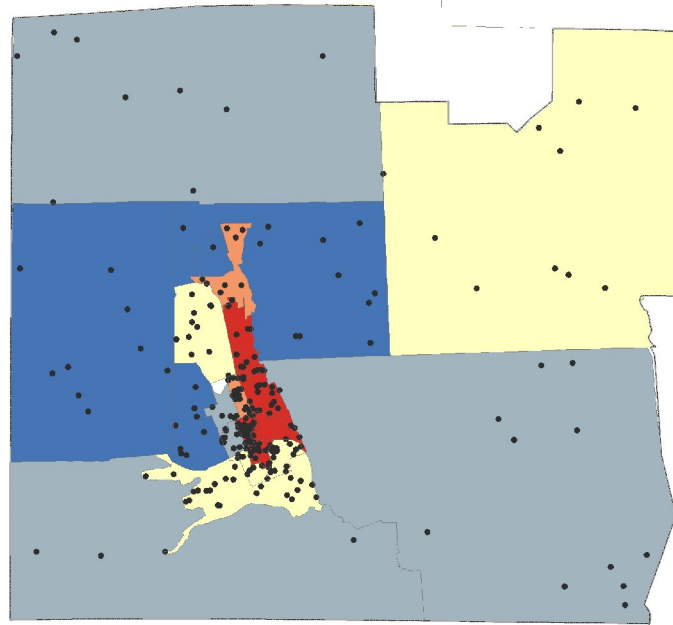


Chemung County Economic Profile

Population Changes



Poverty and Total Personal Income

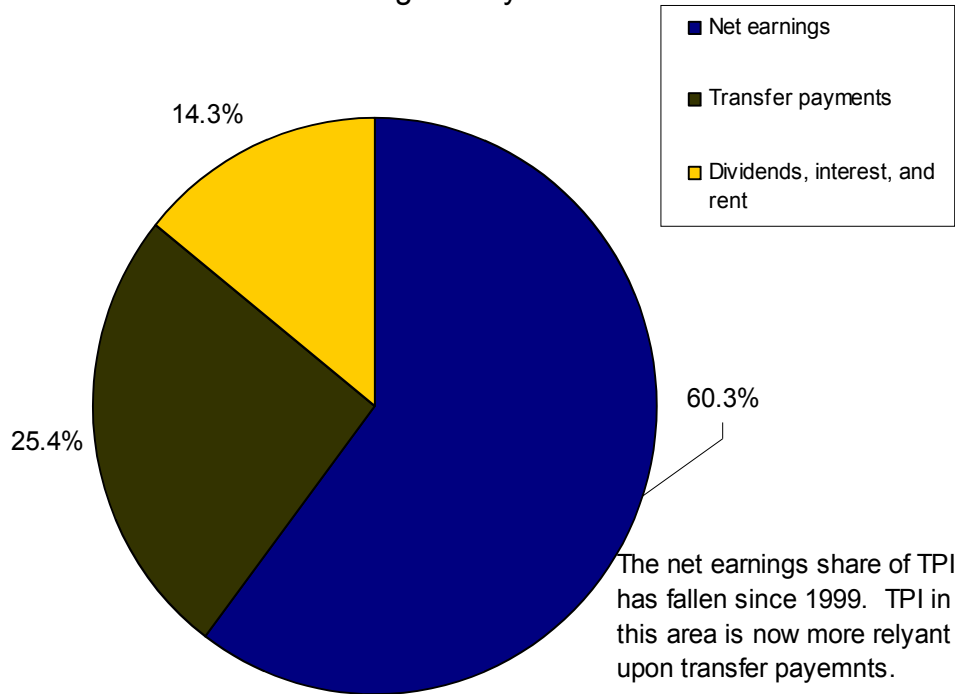


Legend
 Median Household Income
 NCI
 \$14,387 - \$38,338
 \$38,339 - \$52,338
 \$52,339 - \$66,338
 \$66,339 - \$80,338
 \$80,339 - \$120,338

Chemung County
 Median Household Income
 and Persons in Poverty Map

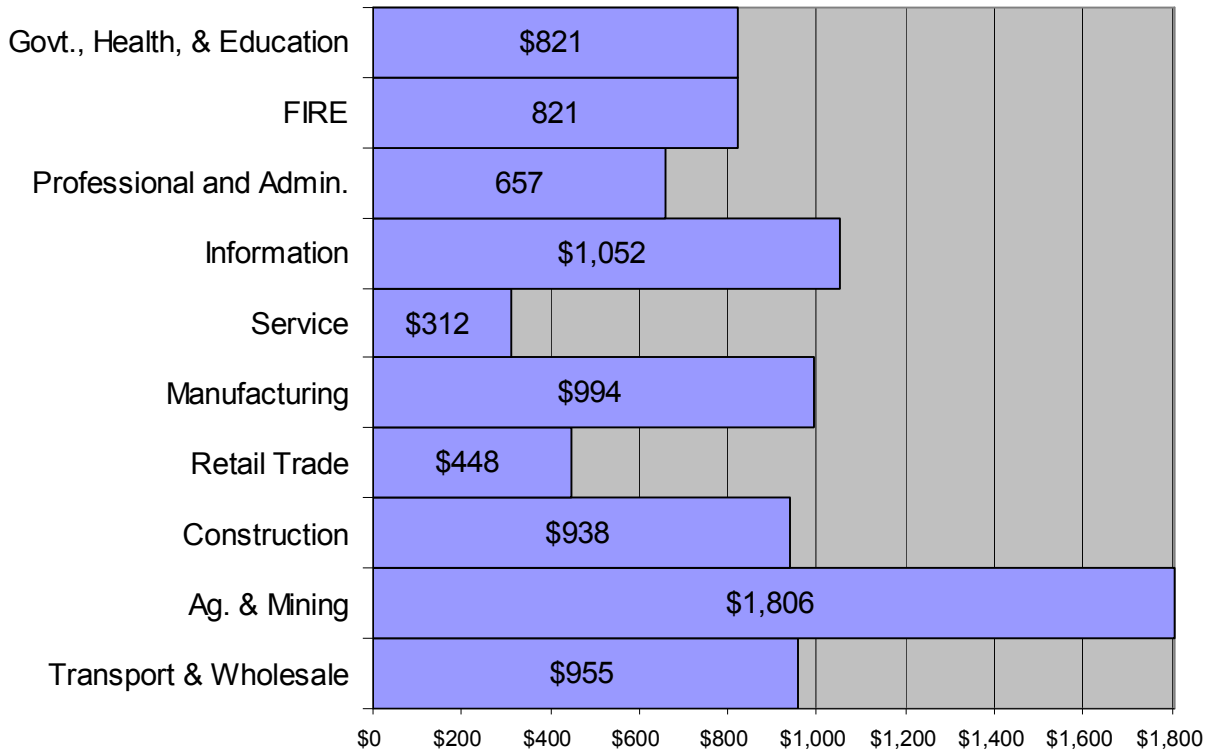


Contribution to Total Personal Income 2009 Chemung County data from the BEA



Wages and Income

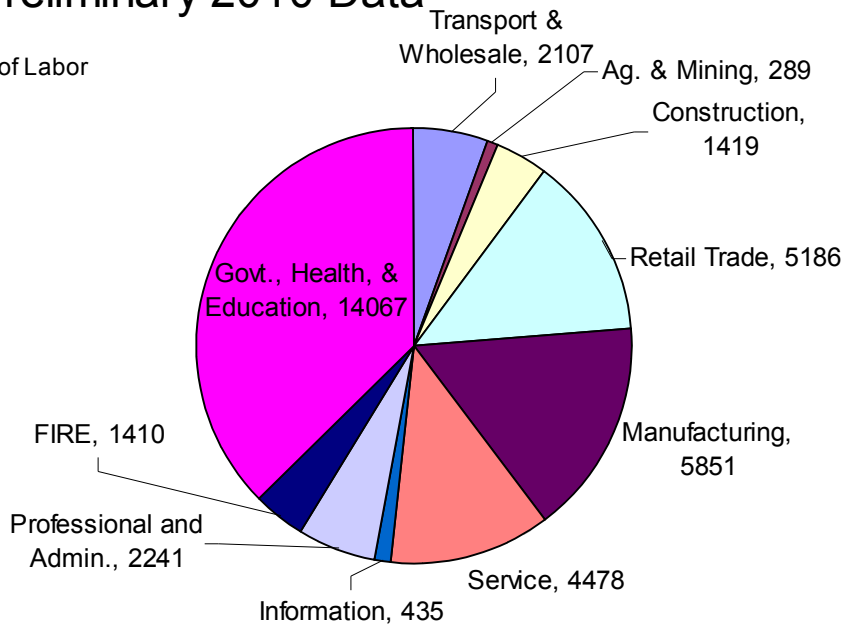
**Average Weekly Wages, Chemung County
Preliminary 2010 Data**



Source: NYS Department of Labor

**Average Employment, Chemung County
Preliminary 2010 Data**

Source:
NYS Department of Labor

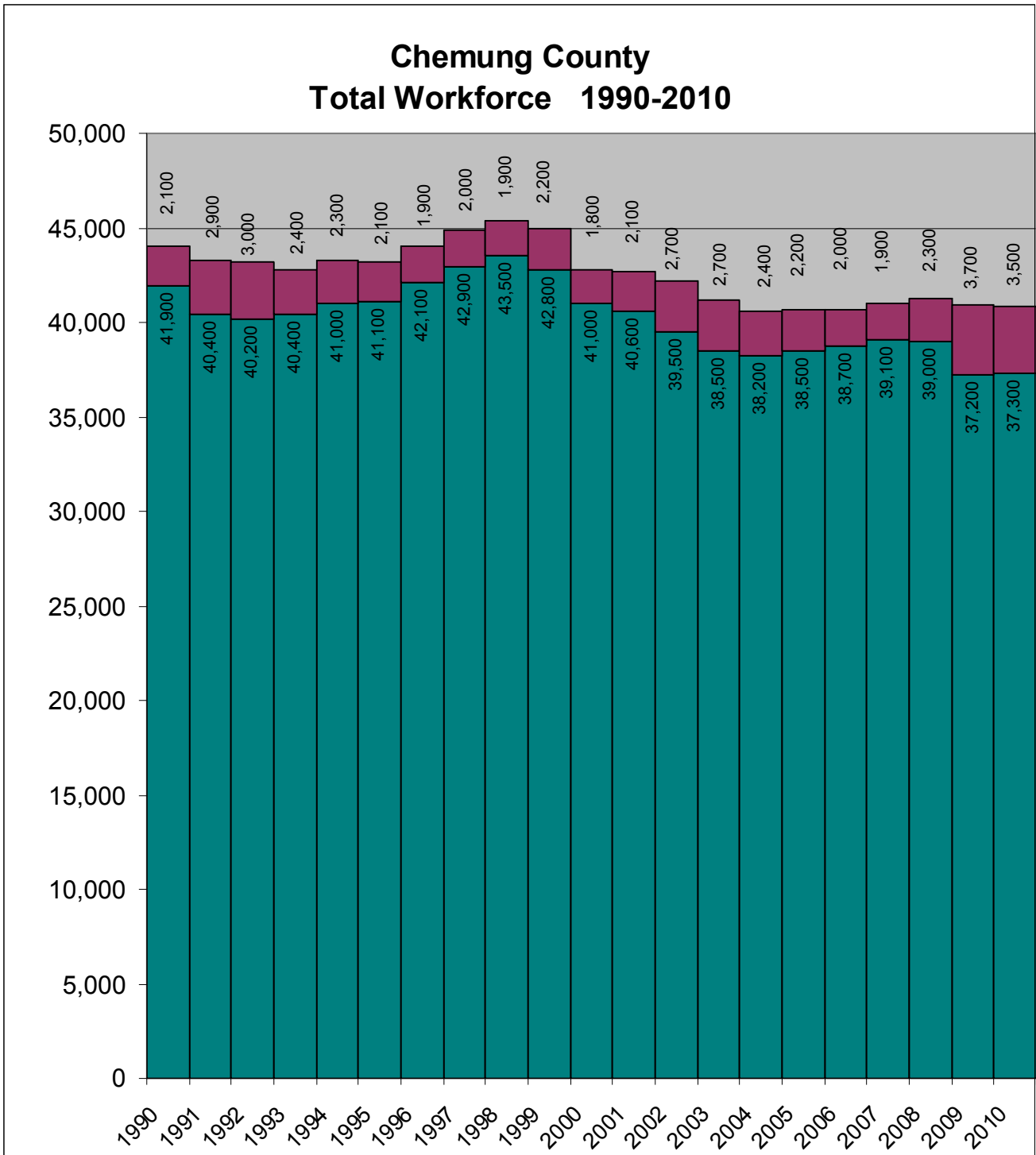


Industries & Major Employers

CHEMUNG COUNTY MAJOR EMPLOYERS	EMPLOYEES
American Customer Care	250
Anchor Glass Container	375
Arnot Hospital	2,000
CAF USA	100
Cameron Manufacturing and Design	230
Cutler-Hammer	325
CVS Distribution Center	100
Dalrymple Gravel and Contracting	250-350
DeMet's Candy Company	200
Elmira College	400
Hardinge Inc.	400
Hilliard Corporation	550
F.M. Howell & Company	300-350
Kennedy Valve (McWane Inc.)	400
Schweizer Aircraft Corporation	1,100
Southern Tier Custom Manufacturing	150
Swift Glass	125
Synthes	350
Thomas and Betts	400
Trayer Products	225-250
Vulcraft of NY, Inc.	250

Data collected in 5/2011, by Southern Tier Economic Growth (STEG)

Labor Force



Economic Clusters

The Rochester Institute of Technology Center for Integrated Manufacturing Studies completed a study and analysis of competitive challenges facing Upstate New York manufacturers in late 2006. STC assisted with local coordination of the study including identification of businesses to be surveyed. The study used a modified cluster theory approach to a bottom-up analysis involving 4,000 companies in 30 Upstate New York counties.

Although the study did not identify unique clusters for the Southern Tier Central or overall Southern Tier region, the results help to identify shared clusters over a larger region and trade area within the global economy. A total of eleven (11) clusters were identified:

- Optics and Imaging
- Wood Products
- Information Hardware and Software
- Communications and Media Services
- Transportation Equipment
- Fashion, Apparel and Textiles
- Biomedical
- Remanufacturing
- Materials Processing
- Industry Machinery and Systems
- Food Processing
- Energy

Energy Development (wind/natural gas)

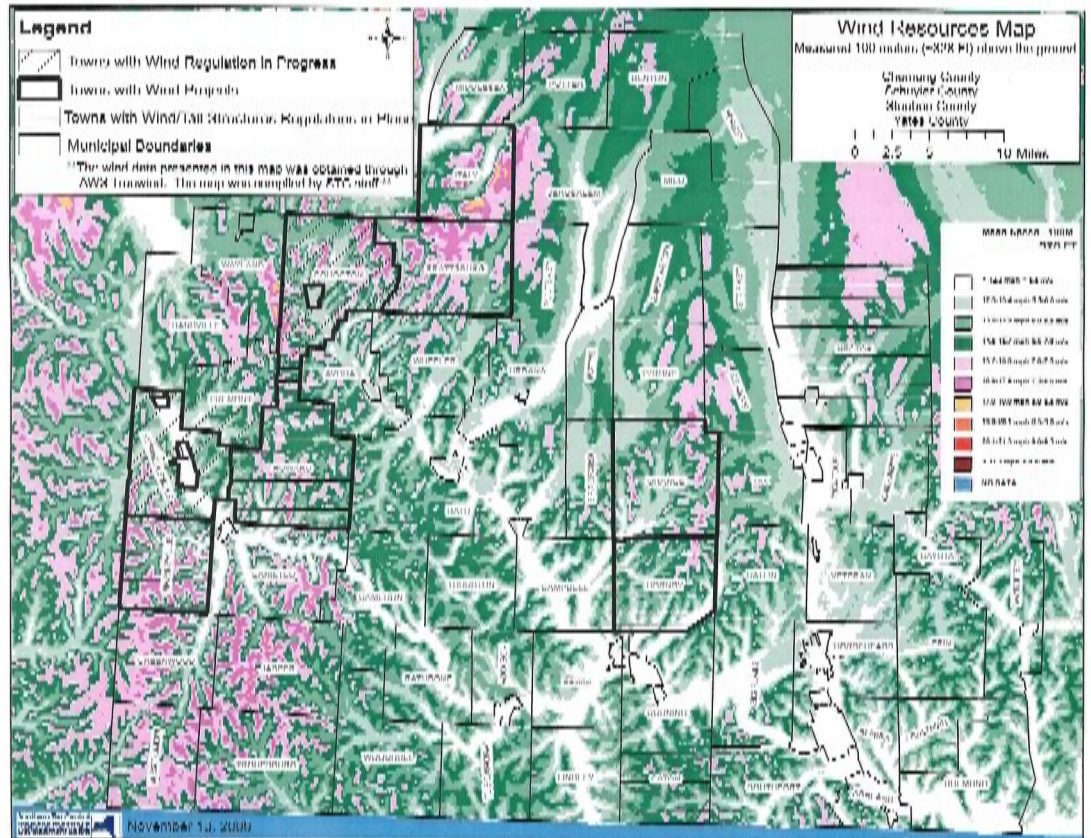
Energy based development is a growing economic force in the STC region.

Energy storage projects are moving forward in Schuyler County.

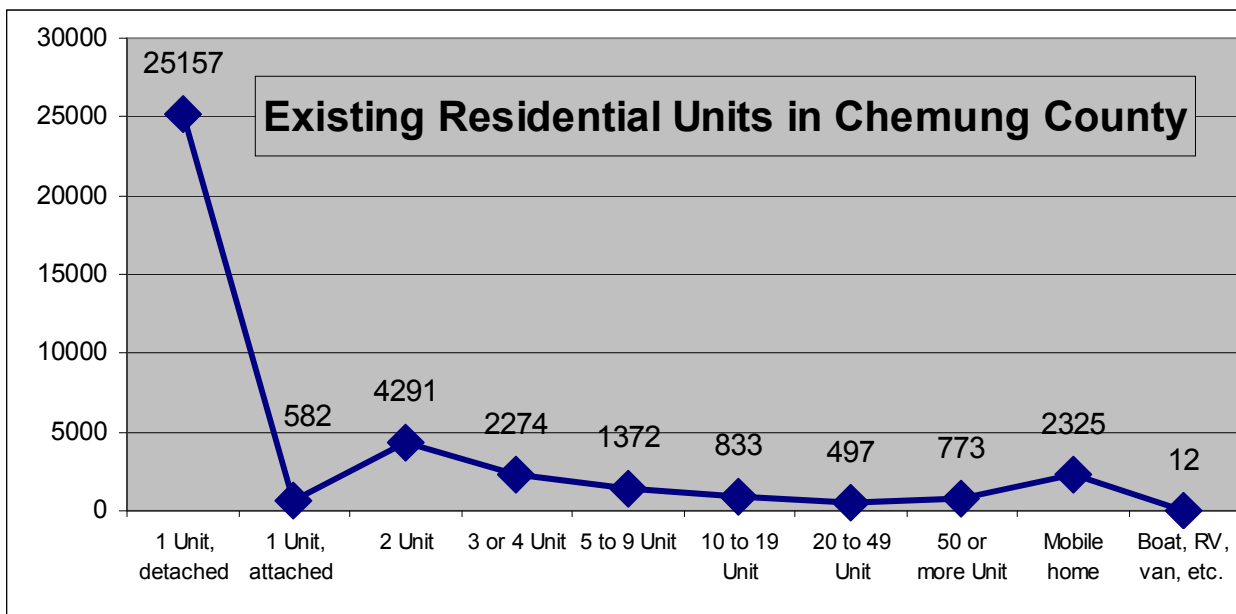
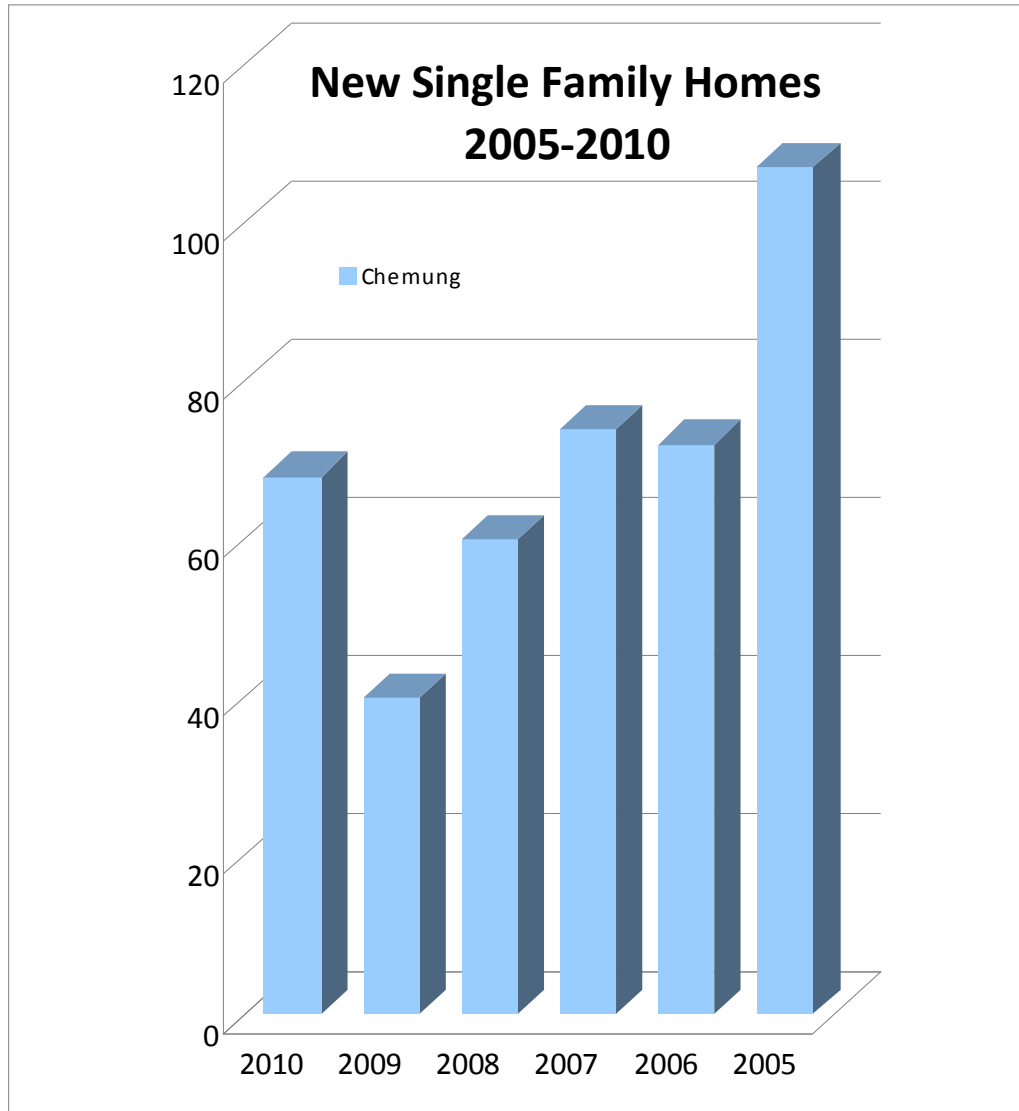
Nearly 1,000,000 Ft² of commercial space in Chemung county is occupied by Marcellus drilling related activities.

In the recent past, energy based growth in Steuben County has been primarily been focused on wind development, primarily due to the high wind speeds in western Steuben County. These projects include:

- Cohocton (constructed) 46 towers producing 125 megawatts
- Prattsburgh (in planning) 34 towers, 78.2 megawatts
- Howard (under construction) 50 megawatts



Housing



Retail Analysis

Chemung County RMP Opportunity Gap	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	1,147,201,057	1,395,053,296	247,852,239 Oversupply

Chemung County is the retail ‘powerhouse’ of the STC region. The retail operations throughout Chemung County are a significant draw for shoppers from all over the STC region. The data show, that retailers in Chemung County already sell more than 200 million dollars of merchandise to residents of the surrounding areas.

Based on 2010 retail data, it seems that the current mix of retail establishments is well matched to the needs/demands of Chemung County consumers. There are three basic categories of retail operations in Chemung County:

- 1) retail stores that have ‘un-met’ consumer demand/’room to grow’
- 2) stores that are already satisfying the existing consumer demand, and
- 3) stores that are meeting the current needs of Chemung County residents and residents from the Greater STC Region (including Tioga and Bradford counties in Pennsylvania).

As the retail needs of locals are primarily being met by the existing retail establishments, most of the future retail growth in Chemung county will be based on the retail needs of the surrounding communities.

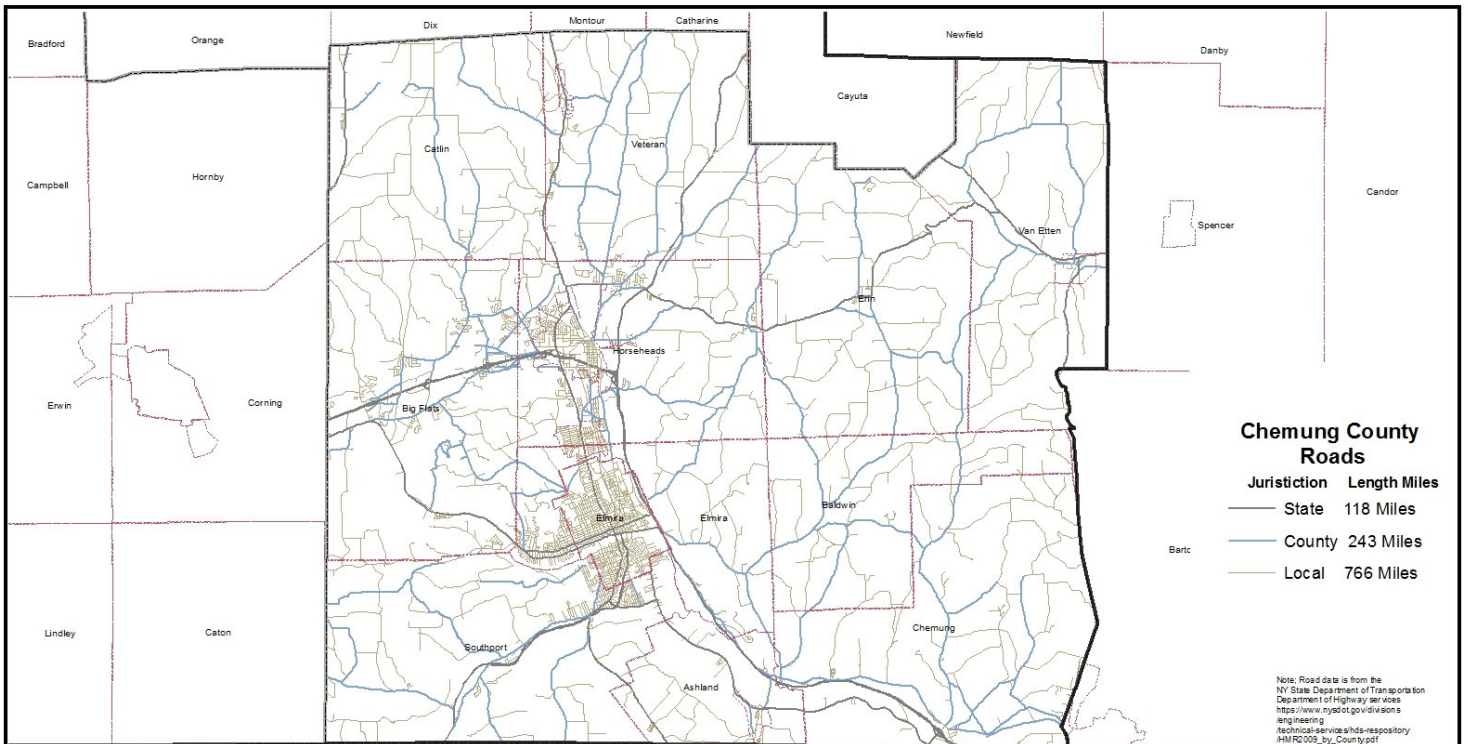
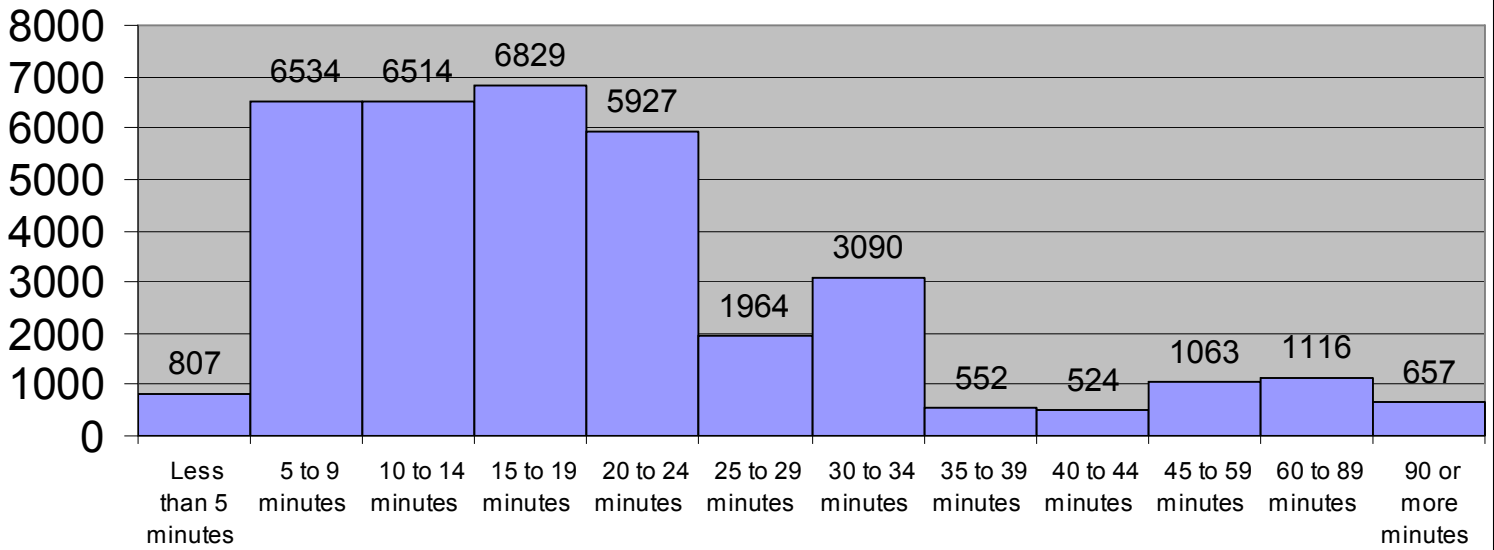
Based on the National average retail sales/ft², of \$300, potential square footage of potential retail space was calculated. Existing structures in Chemung County may be able to accommodate most of this potential retail growth. Though, additional land is available if a new building is required.

The following four (4) retail markets could support growth of existing businesses and/or new retail operations (based solely on the population and demographics of Chemung county}. There may be additional opportunities for retail growth in Chemung county, when considering the needs of Steuben and Schuyler County residents.

Chemung County	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus	Potential Square Footage
Other Motor Vehicle Dealers-4412	13,320,398	7,418,648	5,901,750	19,673
Other Building Materials Dealers-44419	46,302,816	35,988,024	10,314,792	34,383
Nursery and Garden Centers-44422	8,391,456	1,539,423	6,852,033	22,840
Limited-Service Eating Places-7222	51,154,263	46,450,167	4,704,096	15,680
Non-Store Retailers-454	78,928,045	34,676,893	44,251,152	NA

Transportation & Travel

2009 Commute Lengths in Chemung County



Legend

- STC Region
- Lakes and Ponds
- STC Region Roads**
- Jurisdiction
 - State
 - County
 - Local

Chemung County Road Network Map

0 0.5 1 2 3 Miles

Southern Tier Central
Regional Planning & Development Board

