

Introduction

This appendix is intended to introduce the reader to the consumer expenditure profiles for Cattaraugus County and surrounding market area residents including counties located within 40-mile market. In addition to the 40-mile market, the project team also collected consumer expenditure data for a 200-mile radius market area for comparative purposes. The data is used to demonstrate the level of spending for food and related goods purchased by consumers within a specific market. In addition, the data demonstrates total expenditures made by type and indexes these expenditures to national average levels of expenditure. While indexing to national averages is instructive of the relative cost of living in a community, it can be misleading due to other local market conditions.

Data for this appendix was purchased from ESRI on behalf of Cattaraugus County. This data is based on federal surveys of consumer expenditures conducted by the United States Department of Labor. Due to the proprietary nature of this data, it is intended for the internal use of the County only.

Highlights

Following are highlights of Cattaraugus County's consumer expenditure data.

Table D.1: Summary Consumer Expenditure Data			
Expenditure Type	Cattaraugus County	40-Mile Market	200-Market
Percent of Household Income			
Food			
Food At Home	15.22%	15.61%	15.46%
<i>Bakery and Cereal Prod.</i>	9.27%	9.34%	9.26%
<i>Meat, Poultry, Seafood, Eggs</i>	1.36%	1.38%	1.36%
<i>Dairy Products</i>	2.47%	2.46%	2.44%
<i>Fruits and Vegetables</i>	1.01%	1.01%	1.01%
<i>Snacks and Other Foods</i>	1.55%	1.61%	1.59%
Food Away From Home	2.88%	2.88%	2.86%
Apparel			
All Apparel	3.44%	3.75%	3.68%
Transportation			
Vehicle Purchase (Net)	11.74%	10.98%	11.08%
Fuel, Maint., Repair	5.63%	5.46%	5.48%
Home			
Mortgage Pymts & Basics	13.72%	14.89%	14.80%
Maintenance & Remodel Svcs.	3.09%	3.35%	3.32%
Maint. & Remodel Matrl.	0.72%	0.69%	0.70%
Utilities, Fuel, Pub. Svcs.	8.15%	8.19%	8.12%
Percent of National Average			
Food	71%	84%	88%
Food At Home	73%	84%	88%
<i>Bakery and Cereal Prod.</i>	72%	84%	88%
<i>Meat, Poultry, Seafood, Eggs</i>	74%	84%	88%
<i>Dairy Products</i>	73%	84%	88%
<i>Fruits and Vegetables</i>	70%	83%	87%
<i>Snacks and Other Foods</i>	73%	84%	88%
Food Away From Home	69%	83%	87%

Implications for a Cattaraugus County Agriculture and Farmland Protection Plan

Based on consumer expenditure data, it is obvious that consumers in Cattaraugus County benefit from a lower cost of living especially for food products. Because of this, local residents pay a smaller portion of their household income for these and other necessity items such as apparel, transportation, and home items than regional counterparts.

Based on regional price differentials, local agricultural producers may find better price points for retail products in nearby metropolitan markets rather than at home in Cattaraugus County. However, none of these markets seem robust or even offer above average retail opportunities.

In short form, local producers may find it more lucrative to seek markets closer to the metropolitan core of the East Coast or Midwest, where price points are dramatically higher than in the region.



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

County: 36009 Cattaraugus County, NY

Top Tapestry Segments:		Demographic Summary		2005	2010
Rooted Rural	18.8%	Population		83,590	83,195
Salt of the Earth	17.8%	Households		32,390	32,531
Great Expectations	7.9%	Families		21,681	21,523
Rustbelt Retirees	7.4%	Median Age		38.6	40.1
Home Town	6.3%	Median Household Income		\$37,209	\$41,282

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	49	\$1,280.97	\$41,490,761
Men's	52	\$258.46	\$8,371,487
Women's	46	\$410.72	\$13,303,064
Children's	59	\$255.16	\$8,264,564
Footwear	27	\$131.15	\$4,247,984
Watches & Jewelry	61	\$110.80	\$3,588,769
Apparel Products and Services (1)	81	\$114.69	\$3,714,893
Computer			
Computers and Hardware for Home Use	66	\$143.74	\$4,655,766
Software and Accessories for Home Use	65	\$19.68	\$637,334
Entertainment & Recreation	71	\$2,260.75	\$73,225,725
Fees and Admissions	62	\$362.89	\$11,753,944
Membership Fees for Clubs (2)	64	\$101.55	\$3,289,181
Fees for Participant Sports, excl. Trips	63	\$69.63	\$2,255,260
Admission to Movie/Theatre/Opera/Ballet	60	\$85.56	\$2,771,137
Admission to Sporting Events, excl. Trips	62	\$34.42	\$1,114,902
Fees for Recreational Lessons	58	\$71.73	\$2,323,464
TV/Video/Sound Equipment	70	\$738.15	\$23,908,604
Community Antenna or Cable Television	74	\$427.92	\$13,860,369
Color Televisions	65	\$79.37	\$2,570,688
VCRs, Video Cameras, and DVD Players	68	\$26.16	\$847,366
Video Cassettes and DVDs	69	\$34.36	\$1,112,909
Video Game Hardware and Software	66	\$22.86	\$740,431
Satellite Dishes	73	\$1.55	\$50,366
Rental of Video Cassettes and DVDs	66	\$39.57	\$1,281,514
Sound Equipment (3)	63	\$102.52	\$3,320,473
Rental and Repair of TV/Sound Equipment	67	\$3.84	\$124,488
Pets	84	\$338.31	\$10,957,862
Toys and Games	72	\$135.98	\$4,404,299
Recreational Vehicles and Fees (4)	82	\$325.14	\$10,531,150
Sports/Recreation/Exercise Equipment (5)	55	\$120.96	\$3,918,044
Photo Equipment and Supplies (6)	69	\$93.82	\$3,038,854
Reading (7)	69	\$145.51	\$4,712,968
Food	71	\$5,664.39	\$183,469,738
Food at Home	73	\$3,448.74	\$111,704,565
Bakery and Cereal Products	72	\$504.21	\$16,331,227
Meat, Poultry, Fish, and Eggs	74	\$920.82	\$29,825,311
Dairy Products	73	\$375.96	\$12,177,316
Fruit and Vegetables	70	\$577.10	\$18,692,158
Snacks and Other Food at Home (8)	73	\$1,070.66	\$34,678,553
Food Away from Home	69	\$2,215.66	\$71,765,173
Alcoholic Beverages	66	\$369.26	\$11,960,445
Nonalcoholic Beverages at Home	74	\$302.52	\$9,798,634



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

County: 36009 Cattaraugus County, NY

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	46	\$2,082.35	\$67,447,418
Vehicle Loans	78	\$4,464.36	\$144,600,477
Health			
Nonprescription Drugs	77	\$84.33	\$2,731,496
Prescription Drugs	86	\$471.60	\$15,275,180
Eyeglasses and Contact Lenses	74	\$61.23	\$1,983,237
Home			
Mortgage Payment and Basics (9)	65	\$5,106.53	\$165,400,580
Maintenance and Remodeling Services	67	\$1,148.33	\$37,194,485
Maintenance and Remodeling Materials (10)	77	\$269.27	\$8,721,585
Utilities, Fuel, and Public Services	74	\$3,033.93	\$98,268,965
Household Furnishings and Equipment			
Household Textiles (11)	66	\$84.82	\$2,747,233
Furniture	66	\$395.14	\$12,798,616
Floor Coverings	58	\$47.48	\$1,538,012
Major Appliances (12)	72	\$198.47	\$6,428,411
Housewares (13)	57	\$56.20	\$1,820,382
Small Appliances	72	\$26.03	\$843,098
Luggage	60	\$5.95	\$192,714
Telephones and Accessories	27	\$14.55	\$471,123
Household Operations			
Child Care	59	\$236.34	\$7,655,198
Lawn and Garden (14)	80	\$336.17	\$10,888,551
Moving/Storage/Freight Express	59	\$29.53	\$956,560
Housekeeping Supplies (15)	74	\$535.26	\$17,337,040
Insurance			
Owners and Renters Insurance	77	\$327.23	\$10,598,986
Vehicle Insurance	72	\$962.26	\$31,167,649
Life/Other Insurance	76	\$478.48	\$15,498,108
Health Insurance	80	\$1,396.77	\$45,241,486
Personal Care Products (16)	70	\$305.20	\$9,885,357
School Books and Supplies (17)	70	\$79.20	\$2,565,276
Smoking Products	82	\$393.63	\$12,749,595
Transportation			
Vehicle Purchases (Net Outlay) (18)	77	\$4,367.71	\$141,470,278
Gasoline and Motor Oil	77	\$1,370.51	\$44,390,949
Vehicle Maintenance and Repairs	70	\$724.94	\$23,480,680
Travel			
Airline Fares	62	\$235.28	\$7,620,643
Lodging on Trips	69	\$263.18	\$8,524,449
Auto/Truck/Van Rental on Trips	61	\$26.50	\$858,321
Food and Drink on Trips	69	\$306.25	\$9,919,328

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Expenditure data are derived from the 2001, 2002 and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2005 and 2010.

40-Mile Market Area Consumer Expenditures

Retail Goods and Services
Expenditures

Prepared by ACDS, LLC

Cattaraugus County 40-Mile Market Area

Top Tapestry Segments:		Demographic Summary	2005	2010
Rustbelt Retirees	13.6%	Population	1,436,542	1,433,727
Cozy and Comfortable	11.0%	Households	571,851	575,083
Rustbelt Traditions	7.3%	Families	368,444	365,604
Salt of the Earth	6.5%	Median Age	39.1	40.6
Great Expectations	4.9%	Median Household Income	\$42,743	\$48,643

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	61	\$1,601.14	\$915,613,368
Men's	65	\$322.13	\$184,207,660
Women's	57	\$514.73	\$294,348,961
Children's	70	\$301.86	\$172,620,832
Footwear	33	\$160.25	\$91,639,606
Watches & Jewelry	81	\$146.61	\$83,839,903
Apparel Products and Services (1)	109	\$155.56	\$88,956,406
Computer			
Computers and Hardware for Home Use	82	\$178.13	\$101,863,149
Software and Accessories for Home Use	81	\$24.73	\$14,142,557
Entertainment & Recreation	83	\$2,651.15	\$1,516,061,065
Fees and Admissions	82	\$484.70	\$277,177,398
Membership Fees for Clubs (2)	84	\$133.33	\$76,244,444
Fees for Participant Sports, excl. Trips	83	\$90.69	\$51,861,523
Admission to Movie/Theatre/Opera/Ballet	81	\$116.26	\$66,483,638
Admission to Sporting Events, excl. Trips	82	\$45.24	\$25,870,009
Fees for Recreational Lessons	81	\$99.18	\$56,717,784
TV/Video/Sound Equipment	84	\$885.74	\$506,511,540
Community Antenna or Cable Television	87	\$501.89	\$287,005,248
Color Televisions	82	\$99.80	\$57,070,941
VCRs, Video Cameras, and DVD Players	82	\$31.73	\$18,145,706
Video Cassettes and DVDs	81	\$40.75	\$23,303,246
Video Game Hardware and Software	82	\$28.41	\$16,246,852
Satellite Dishes	76	\$1.62	\$928,287
Rental of Video Cassettes and DVDs	81	\$48.62	\$27,804,424
Sound Equipment (3)	79	\$127.93	\$73,159,227
Rental and Repair of TV/Sound Equipment	86	\$4.98	\$2,847,609
Pets	92	\$369.06	\$211,048,781
Toys and Games	84	\$159.87	\$91,423,349
Recreational Vehicles and Fees (4)	81	\$318.08	\$181,894,574
Sports/Recreation/Exercise Equipment (5)	63	\$136.57	\$78,095,812
Photo Equipment and Supplies (6)	84	\$114.75	\$65,620,593
Reading (7)	86	\$182.37	\$104,289,018
Food	84	\$6,672.41	\$3,815,624,417
Food at Home	84	\$3,990.11	\$2,281,747,920
Bakery and Cereal Products	84	\$587.92	\$336,205,234
Meat, Poultry, Fish, and Eggs	84	\$1,051.14	\$601,094,789
Dairy Products	84	\$433.62	\$247,966,993
Fruit and Vegetables	83	\$687.68	\$393,248,566
Snacks and Other Food at Home (8)	84	\$1,229.75	\$703,232,338
Food Away from Home	83	\$2,682.30	\$1,533,876,497
Alcoholic Beverages	84	\$465.70	\$266,312,221
Nonalcoholic Beverages at Home	84	\$342.17	\$195,669,840



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

Counties: 36003 Allegany County, NY, 36009 Cattaraugus County, NY, et. al.

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	75	\$3,378.93	\$1,932,246,526
Vehicle Loans	82	\$4,716.69	\$2,697,244,295
Health			
Nonprescription Drugs	87	\$95.90	\$54,839,620
Prescription Drugs	91	\$499.22	\$285,477,967
Eyeglasses and Contact Lenses	86	\$71.74	\$41,023,135
Home			
Mortgage Payment and Basics (9)	81	\$6,365.75	\$3,640,260,979
Maintenance and Remodeling Services	83	\$1,430.16	\$817,841,114
Maintenance and Remodeling Materials (10)	84	\$296.14	\$169,346,042
Utilities, Fuel, and Public Services	86	\$3,501.03	\$2,002,069,392
Household Furnishings and Equipment			
Household Textiles (11)	82	\$105.51	\$60,338,351
Furniture	81	\$486.41	\$278,153,774
Floor Coverings	80	\$65.23	\$37,303,841
Major Appliances (12)	82	\$226.13	\$129,312,683
Housewares (13)	67	\$66.07	\$37,784,852
Small Appliances	85	\$30.53	\$17,457,192
Luggage	82	\$8.12	\$4,640,890
Telephones and Accessories	34	\$18.27	\$10,445,204
Household Operations			
Child Care	79	\$317.65	\$181,649,384
Lawn and Garden (14)	86	\$358.91	\$205,244,140
Moving/Storage/Freight Express	77	\$38.73	\$22,148,007
Housekeeping Supplies (15)	85	\$619.61	\$354,322,927
Insurance			
Owners and Renters Insurance	86	\$366.29	\$209,464,590
Vehicle Insurance	84	\$1,110.93	\$635,286,653
Life/Other Insurance	87	\$543.08	\$310,559,699
Health Insurance	88	\$1,536.26	\$878,510,741
Personal Care Products (16)	83	\$361.92	\$206,962,084
School Books and Supplies (17)	85	\$96.03	\$54,914,179
Smoking Products	89	\$425.37	\$243,246,287
Transportation			
Vehicle Purchases (Net Outlay) (18)	83	\$4,694.92	\$2,684,793,081
Gasoline and Motor Oil	83	\$1,489.34	\$851,683,181
Vehicle Maintenance and Repairs	82	\$846.02	\$483,797,045
Travel			
Airline Fares	82	\$311.70	\$178,246,810
Lodging on Trips	85	\$325.06	\$185,885,042
Auto/Truck/Van Rental on Trips	81	\$35.59	\$20,349,645
Food and Drink on Trips	84	\$371.78	\$212,601,482

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Expenditure data are derived from the 2001, 2002 and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2005 and 2010.

200-Mile Market Consumer Expenditures



200-Mile Market Area

Retail Goods and Services
Expenditures

Prepared by ACDS, LLC

Site Type:	Radius	Radius:	200.0 miles
Top Tapestry Segments:		Demographic Summary	
Rustbelt Retirees	10.8%	Population	2005 13,111,677 2010 13,275,842
Salt of the Earth	9.8%	Households	5,196,189 5,303,029
Cozy and Comfortable	7.2%	Families	3,420,588 3,430,516
Rustbelt Traditions	5.9%	Median Age	39.6 41.0
Green Acres	5.0%	Median Household Income	\$45,186 \$52,557
	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	63	\$1,664.00	\$8,646,447,248
Men's	67	\$335.61	\$1,743,909,598
Women's	59	\$534.25	\$2,776,055,039
Children's	73	\$315.72	\$1,640,522,551
Footwear	35	\$166.97	\$867,614,083
Watches & Jewelry	84	\$151.90	\$789,285,936
Apparel Products and Services (1)	112	\$159.55	\$829,060,041
Computer			
Computers and Hardware for Home Use	86	\$186.77	\$970,499,404
Software and Accessories for Home Use	85	\$25.88	\$134,476,418
Entertainment & Recreation	87	\$2,791.92	\$14,507,328,759
Fees and Admissions	85	\$502.31	\$2,610,086,633
Membership Fees for Clubs (2)	88	\$138.40	\$719,174,659
Fees for Participant Sports, excl. Trips	86	\$94.33	\$490,150,908
Admission to Movie/Theatre/Opera/Ballet	84	\$120.07	\$623,884,270
Admission to Sporting Events, excl. Trips	85	\$46.96	\$244,003,243
Fees for Recreational Lessons	84	\$102.55	\$532,873,553
TV/Video/Sound Equipment	88	\$924.97	\$4,806,338,633
Community Antenna or Cable Television	90	\$523.99	\$2,722,756,598
Color Televisions	85	\$103.88	\$539,795,897
VCRs, Video Cameras, and DVD Players	86	\$33.24	\$172,746,632
Video Cassettes and DVDs	86	\$42.86	\$222,696,717
Video Game Hardware and Software	86	\$29.59	\$153,762,202
Satellite Dishes	83	\$1.76	\$9,160,417
Rental of Video Cassettes and DVDs	85	\$50.83	\$264,126,240
Sound Equipment (3)	82	\$133.69	\$694,693,883
Rental and Repair of TV/Sound Equipment	89	\$5.12	\$26,600,047
Pets	98	\$393.11	\$2,042,696,017
Toys and Games	89	\$167.60	\$870,898,862
Recreational Vehicles and Fees (4)	88	\$348.68	\$1,811,794,499
Sports/Recreation/Exercise Equipment (5)	67	\$145.50	\$756,024,850
Photo Equipment and Supplies (6)	88	\$120.16	\$624,348,565
Reading (7)	90	\$189.59	\$985,140,700
Food	88	\$6,985.45	\$36,297,714,051
Food at Home	88	\$4,183.83	\$21,739,968,995
Bakery and Cereal Products	88	\$615.40	\$3,197,721,693
Meat, Poultry, Fish, and Eggs	88	\$1,102.95	\$5,731,128,862
Dairy Products	88	\$455.31	\$2,365,899,858
Fruit and Vegetables	87	\$718.36	\$3,732,731,213
Snacks and Other Food at Home (8)	88	\$1,291.81	\$6,712,487,369
Food Away from Home	87	\$2,801.62	\$14,557,745,056
Alcoholic Beverages	87	\$483.11	\$2,510,356,667
Nonalcoholic Beverages at Home	88	\$360.19	\$1,871,633,859



200-Mile Market Area

Retail Goods and Services Expenditures

Prepared by ACDS, LLC

Site Type:	Radius	Radius:	200.0 miles
	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	77	\$3,462.50	\$17,991,781,832
Vehicle Loans	88	\$5,052.84	\$26,255,520,792
Health			
Nonprescription Drugs	92	\$100.70	\$523,250,699
Prescription Drugs	96	\$528.61	\$2,746,769,786
Eyeglasses and Contact Lenses	91	\$75.32	\$391,385,711
Home			
Mortgage Payment and Basics (9)	85	\$6,688.96	\$34,757,123,736
Maintenance and Remodeling Services	87	\$1,499.34	\$7,790,858,535
Maintenance and Remodeling Materials (10)	90	\$315.95	\$1,641,744,359
Utilities, Fuel, and Public Services	90	\$3,668.00	\$19,059,633,518
Household Furnishings and Equipment			
Household Textiles (11)	86	\$110.28	\$573,040,950
Furniture	85	\$509.16	\$2,645,706,468
Floor Coverings	83	\$67.62	\$351,344,580
Major Appliances (12)	87	\$239.60	\$1,245,014,165
Housewares (13)	70	\$69.64	\$361,869,976
Small Appliances	89	\$32.09	\$166,759,119
Luggage	85	\$8.39	\$43,574,431
Telephones and Accessories	35	\$19.01	\$98,763,328
Household Operations			
Child Care	82	\$328.36	\$1,706,201,550
Lawn and Garden (14)	91	\$383.07	\$1,990,529,046
Moving/Storage/Freight Express	80	\$40.28	\$209,279,696
Housekeeping Supplies (15)	89	\$650.73	\$3,381,305,270
Insurance			
Owners and Renters Insurance	91	\$387.87	\$2,015,470,457
Vehicle Insurance	88	\$1,168.76	\$6,073,115,065
Life/Other Insurance	92	\$572.91	\$2,976,933,755
Health Insurance	93	\$1,623.04	\$8,433,645,671
Personal Care Products (16)	87	\$378.97	\$1,969,175,310
School Books and Supplies (17)	89	\$101.15	\$525,615,587
Smoking Products	93	\$447.50	\$2,325,302,790
Transportation			
Vehicle Purchases (Net Outlay) (18)	88	\$5,007.34	\$26,019,069,718
Gasoline and Motor Oil	88	\$1,582.39	\$8,222,386,880
Vehicle Maintenance and Repairs	86	\$891.92	\$4,634,609,018
Travel			
Airline Fares	85	\$323.38	\$1,680,360,457
Lodging on Trips	89	\$339.96	\$1,766,521,005
Auto/Truck/Van Rental on Trips	84	\$36.92	\$191,860,351
Food and Drink on Trips	88	\$390.18	\$2,027,438,290

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Expenditure data are derived from the 2001, 2002 and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2005 and 2010.

Table Definitions



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

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- (1) **Apparel Products and Services** includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
- (2) **Membership Fees for Clubs** includes membership fees for social, recreational, and civic clubs.
- (3) **Sound Equipment** includes sound components and systems, CDs, tapes, records, needles, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.
- (4) **Recreational Vehicles & Fees** includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.
- (5) **Sports/Recreation/Exercise Equipment** includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (6) **Photo Equipment and Supplies** includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (7) **Reading** includes newspapers, newspaper subscriptions, magazines, magazine subscriptions, and books.
- (8) **Snacks and Other Food at Home** includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (9) **Mortgage Payment and Basics** includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.
- (10) **Maintenance and Remodeling Materials** includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, insulation materials, and materials to finish a basement, for owned homes.
- (11) **Household Textiles** includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.
- (12) **Major Appliances** includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (13) **Housewares** includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.
- (14) **Lawn and Garden** includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (15) **Housekeeping Supplies** includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrapping supplies, postage, and delivery services.
- (16) **Personal Care Products** includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, and personal care appliances.
- (17) **School Books and Supplies** includes books and supplies for college, elementary school, high school, and preschool.
- (18) **Vehicle Purchases (Net Outlay)** includes net outlay for new and used cars, trucks, vans, motorcycles, and motor scooters.
-

Introduction

This appendix is designed to introduce the reader to the current state of agriculture in Cattaraugus County. If farmers in Cattaraugus County are to successfully develop a marketing program, then that program must be designed with an eye toward the realities of regional and local agriculture. Specific to this analysis, the project team has focused on both production specifics as well as grower and farmers characteristics.

Generally, the data in this section is drawn from the 2002 U.S. Agricultural Census. Time series comparisons using 2002 Census data were not possible beyond comparisons to the year of 1997 due to changes in the 2002 Census. These changes included wide ranging amendments to Census definitions, such as the definition of a farm, as well as new sampling and adjustment methodologies. Because of this, the data is occasionally supplemented by U.S. Bureau of Economic Analysis (BEA) time series data. It is also important to note that many data points for Cattaraugus County can not be reported due to the small number of farms in certain production types.

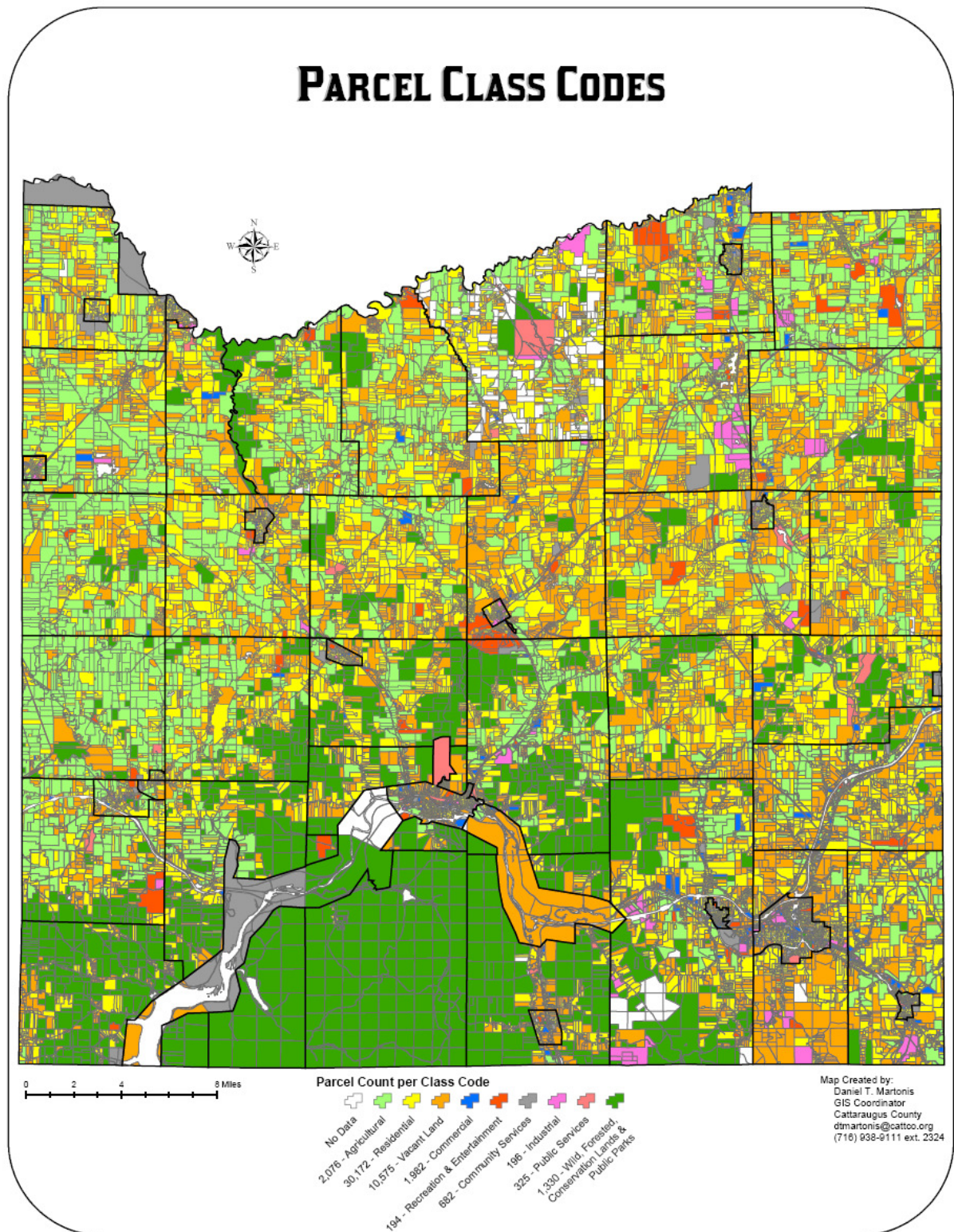
Highlights

Tabular highlights of the 2002 Census of Agriculture for both Cattaraugus County and the 40-mile market area can be found on page F-3. Other key highlights include:

- Cattaraugus County has 1,157 farms operating on 201,913 acres, which is a decrease of 31 farms and decrease of 14,000 acres since 1997.
- Agriculture is the largest economic land use.
- Disposition of agricultural land is changing with cropland decreasing as a percentage of farmland in favor of pasture lands.
- Agricultural marketing rose 4.5% from 1997, rising to \$58,352,000. Direct market sales fell to less than 1% of total sales.
- Dairy and cattle sales account for 73% of sales.
- Thirty percent of Cattaraugus County's farms have sales of less than \$1,000.
- Fifty-four percent of Cattaraugus County's farms operate with negative cash flow.
- Only 54% of county farms are operated by full-time farmers.
- Cattaraugus County's average farm operators' age is in excess of 54, but the fastest growing group of farmers is over 55.
- Nearly 24% of farm operators are considered beginning farmers under USDA's definition of 10 or fewer years of experience.
- Cattaraugus County relies heavily on the broader region for both agricultural input and output markets.
- Equestrian operations are becoming important to the agricultural economy.

Land-Use

As is evidenced in the map below, agriculture is highly dispersed throughout the County.



Agriculture Highlights

	Farm Highlights						Cattaraugus County Highlights Summary Data					
	40-mile County Highlights Summary Data			1997			2002			1997		
	Data	Units	Percent Change	Data	Units	Percent Change	Data	Units	Percent Change	Data	Units	Percent Change
Farms	7,722	Farms	-3.78%	8,025	Farms	-3.78%	1,157	Farms		1,188	Farms	-2.61%
Land in Farms	1,438,666	Acres	-0.14%	1,440,666	Acres	-0.14%	201,913	Acres		215,692	Acres	-6.39%
Average Farm Size	186	Acres	3.78%	180	Acres	3.78%	175	Acres		182	Acres	-4.11%
Estimated Value of Land and Buildings	\$ 1,989,587	(\$1,000's)	21.91%	\$ 1,631,958	(\$1,000's)	21.91%	\$ 253,116	(\$1,000's)		\$ 211,541	(\$1,000's)	19.65%
Total Cropland	878,175	Acres	-0.59%	883,399	Acres	-0.59%	108,279	Acres		115,879	Acres	-6.56%
Harvested Cropland	678,741	Acres	2.81%	660,160	Acres	2.81%	77,030	Acres		79,042	Acres	-2.55%
Cropland Used for Pasture	98,070	Acres	-22.78%	127,005	Acres	-22.78%	16,313	Acres		21,884	Acres	-25.46%
Other Cropland	101,364	Acres	5.33%	96,234	Acres	5.33%	14,936	Acres		14,953	Acres	-0.11%
Woodland	339,515	Acres	-1.35%	344,161	Acres	-1.35%	60,385	Acres		62,039	Acres	-2.67%
Pastured	43,719	Acres	3.24%	42,349	Acres	3.24%	8,745	Acres		7,340	Acres	19.14%
Other Woodland	295,796	Acres	-1.79%	301,182	Acres	-1.79%	51,640	Acres		54,669	Acres	-5.54%
Pastureland and Rangeland	99,386	Acres	5.67%	94,056	Acres	5.67%	18,066	Acres		17,709	Acres	2.02%
Pastureland	241,175	Acres	-8.44%	263,410	Acres	-8.44%	43,124	Acres		46,933	Acres	-8.12%
Total Farm Sales	\$ 603,957	(\$1,000's)	16.53%	\$ 518,293	(\$1,000's)	16.53%	\$ 58,352	(\$1,000's)		\$ 55,922	(\$1,000's)	4.35%
Crops Including Nursery and Greenhouse	175,327	(\$1,000's)	34.07%	130,774	(\$1,000's)	34.07%	15,670	(\$1,000's)		11,030	(\$1,000's)	42.07%
Livestock and Poultry	428,630	(\$1,000's)	10.61%	387,520	(\$1,000's)	10.61%	42,682	(\$1,000's)		44,892	(\$1,000's)	-4.92%
Direct to Consumer (Human Consumption)	5,608	(\$1,000's)	2.54%	5,469	(\$1,000's)	2.54%	478	(\$1,000's)		578	(\$1,000's)	-17.30%
Net Cash Income												
Positive Cashflow	43.50%	Percent of Farms					45.89%	Percent of Farms				
Negative Cashflow	55.97%	Percent of Farms					54.11%	Percent of Farms				
Principal Occupation												
Farming	4,457		12.55%	3,960		12.55%	628			582		7.90%
Other	3,265		-19.68%	4,065		-19.68%	529			606		-12.71%
Age of Operator												
Under 55	4,211		-8.73%	4,614		-8.73%	638			712		-10.39%
55 and Over	3,472		1.79%	3,411		1.79%	519			476		9.03%
Gender of Operator												
Male	6,749	Farms	-6.00%	7,180	Farms	-6.00%	1,034	Farms		1,073	Farms	-3.63%
Female	973	Farms	15.15%	845	Farms	15.15%	123	Farms		115	Farms	6.96%
Land Tenure												
Full Owner	5,382	Farms	0.28%	5,367	Farms	0.28%	817	Farms		792	Farms	3.16%
Full Owner	652,276	Acres	5.89%	616,004	Acres	5.89%	102,760	Acres		107,668	Acres	-4.56%
Part Owner	2,079	Farms	-7.68%	2,252	Farms	-7.68%	308	Farms		344	Farms	-10.47%
Part Owner	703,695	Acres	-7.38%	759,768	Acres	-7.38%	93,585	Acres		101,352	Acres	-7.66%
Tenant	261	Farms	-35.71%	406	Farms	-35.71%	32	Farms		52	Farms	-38.46%
Tenant	42,892	Acres	-33.90%	64,894	Acres	-33.90%	5,568	Acres		6,672	Acres	-16.55%
Years on Present Farm												
9 or less	1,867		-0.64%	1,879		-0.64%	277			270		2.59%
10 or more	5,855		17.22%	4,995		17.22%	880			695		26.62%

Farm Production Trends

Following is a brief discussion of production trends by sector.

Meat, Poultry, and Aquaculture

Dairy and livestock have historically been important to this region. Dairy production remains the key sector directly creating more than 50% of the agricultural output and accounting for more than 50% of the livestock industry. However, the dairy industry is in a slow decline, in part related to the localized conditions that make large scale dairy expansion difficult. However, beef inventory is rising to take advantage of good pasturing opportunities in the region.

Livestock Production										
Livestock	40-mile Market						Cattaraugus County			
	2002		1997		Change		2002		1997	
	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory
CATTLES AND CALVES										
COWS AND HEIFERS - BEEF	1,625	17,898	1,520	15,979	6.91%	12.01%	250	2,482	241	2,043
COWS AND HEIFERS - DAIRY	1,396	147,250	1,800	148,062	-22.44%	-0.55%	267	16,705	365	20,154
CATTLE ON FEED	408	12,279	NA	NA			60	515	NA	NA
OTHER CATTLE	2,896	154,490	NA	NA			499	16,088	NA	NA
DAIRY PRODUCTS	1,247	\$ 351,320	1,648	\$ 322,302	-24.33%	9.00%	240	\$ 36,486	346	\$ 37,834
HOGS AND PIGS (underreported due to disclosure)	359	7,985	482	10,950	-25.52%	-27.08%	59	509	122	1,345
SHEEP AND LAMBS (underreported due to disclosure)	351	11,884	327	13,024	7.34%	-8.75%	58	946	47	1,236
MEAT GOATS (underreported due to disclosure)	280	2,548					33	163		

Poultry has never been a significant industry sector in the region and poultry numbers continue to decline. Based on interviews, poultry is maintained for personal consumption and direct market sales.

Poultry Production										
Poultry Type	40-mile Market						Cattaraugus County			
	2002		1997		Change		2002		1997	
	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory
ALL POULTRY	632		767		-17.60%		109		163	
LAYERS* (underreported due to disclosure)	495	10,120	540	9,304	-8.33%	8.77%	83	2,242	127	3,108
BROILERS AND MEAT TYPE CHICKENS* (underreported due to disclosure)	143	10,180	157	3,794	-8.92%	168.32%	25	800	37	1,405
TURKEYS* (underreported due to disclosure)	95	1,067	132	2,903	-28.03%	-63.24%	11	181	23	171

Cattaraugus County is a minor player in the aquaculture industry with most activity in fee fishing and pond aquaculture. Because of the small number of operations regionally and the limited data collection capacity, it is impossible to accurately track the industry. However, the 2002 Agricultural Census is now addressing this issue.

Aquaculture Production		
Aquaculture Type	Farms with Aquaculture Sold	
	40-Mile Market	Cattaraugus County
CATFISH	2	
TROUT	15	1
OTHER FOOD FISH (See Text)	4	
BAITFISH (See Text)	11	
CRUSTACEANS (See Text)	3	
ORNAMENTAL FISH (See Text)	2	
SPORT OR GAME FISH (See Text)	22	5
OTHER AQUACULTURE PRODUCTS (See Text)	1	1

Nursery and Greenhouse

As a production alternative to more traditional field crops, nursery and greenhouse production has made modest gains in the market area. Exclusive of Christmas Trees, approximately 4% of the County's farms raise nursery and greenhouse products. Regionally, these operations are small producing on average 9 acres of open production and 11,000 square feet under cover. Cattaraugus County nursery and greenhouse operations tend to be small with an average 5,300 square feet under protection. Leading production sectors include floriculture, bedding plants, and nursery stock.

Greenhouse-Nursery Type	2002 Greenhouse and Nursery Production					
	40-mile Market			Cattaraugus County		
	Farms	Sq. ft. under glass or protection	Acres in the open	Farms	Sq. ft. under glass or protection	Acres in the open
NURSERY, GREENHOUSE, FLORICULTURE, ETC. - TOTAL	339	3,707,272	3092	49	259490	(D)
NURSERY, FLORICULTURE, FV SEED CROPS, ETC. IRRIGATED IN THE OPEN	74	-	315	11	(X)	(D)
FLORICULTURE CROPS - TOTAL	211	512,115	138	29	(D)	13
BEDDING/GARDEN PLANTS	185	1,738,695	106	18	98174	7
CUT FLOWERS AND CUT FLORIST GREENS	25	-	16	8	0	4
FOLIAGE PLANTS	18	3,914	-	-	-	-
POTTED FLOWERING PLANTS	71	994,716	-	9	(D)	2
AQUATIC PLANTS	7	-	-	-	-	-
FLOWER SEEDS, BULBS, CORMS, RHIZOMES, AND TUBERS - DRY	6	-	-	-	-	-
GREENHOUSE VEGETABLES	12	3,175	-	1	(D)	(X)
NURSERY STOCK	139	-	481	18	(D)	(D)
SOD HARVESTED	1	-	-	-	-	-
VEGETABLE SEEDS	8	-	-	2	(D)	(D)
OTHER NURSERY AND GREENHOUSE CROPS	5	-	-	2	-	(D)
CUT CHRISTMAS TREES	316	-	-	50	-	(D)

Vegetables and Fruits

In Cattaraugus County, open field production of vegetables consists mostly of fresh market production, while the region is split between process and fresh market. Within the region, production is concentrated within a few vegetable types led by sweet corn, peas, beans, and pumpkins. Vegetable production in the County is too small to quantify.

Vegetable (by type)	Vegetable Production							
	40-mile Market				Cattaraugus County			
	Harvested Farms	Harvested Acres	Fresh Market	Processing	Harvested Farms	Harvested Acres	Fresh Market	Processing
VEGETABLES HARVESTED FOR SALE	359	21428	72	11930	40	462	3	(D)
ASPARAGUS	29	42	0	0	5	4	-	-
GREEN LIMA BEANS	1	0	0	0				
SNAP BEANS	74	3657	15	2855	12	(D)	1	(D)
BEEFS	24	298	5	0	1	(D)	-	-
BROCCOLI	13	4	0	0	4	1	-	-
BRUSSELS SPROUTS	2	0	0	0	2	(D)	-	-
CHINESE CABBAGE	4	0	0	0				
HEAD CABBAGE	23	82	1	0	3	3	-	-
CANTALOUPS	17	33	0	0				
CARROTS	9	1	0	0				
CAULIFLOWER	16	12	0	0	4	(Z)	-	-
CHICORY	2	0	0	0				
COLLARDS	3	0	0	0				
CUCUMBERS AND PICKLES	39	74	0	0	4	1	-	-
EGGPLANT	4	14	0	0				
GARLIC	15	11	0	0	4	(Z)	-	-
HERBS, FRESH CUT	5	7	0	0				
KALE	6	5	0	0				
LETTUCE, ALL	21	65	0	0	6	2	-	-
LETTUCE, HEAD	4	0	0	0	2	(D)	-	-
LETTUCE, LEAF	13	41	0	0	4	(D)	-	-
LETTUCE, ROMAINE	6	0	0	0				
MUSTARD GREENS	2	0	0	0				
DRY ONIONS	22	9	1	0	3	2	-	-
GREEN ONIONS	5	2	0	0				
PEAS, CHINESE (SUGAR & SNOW)	1	0	0	0				
PEAS, GREEN (EXCLUDING SOUTHERN)	45	3580	29	3289	4	1	-	-
PEPPERS, BELL	88	182	3	0	12	21	1	(D)
PEPPERS, CHILE (ALL PEPPERS - EXCL BELL)	35	13	2	0	6	2	-	-
PUMPKINS	166	486	13	27	25	63	1	(D)
RADISHES	5	2	0	0				
RHUBARB	10	5	0	0				
SPINACH	8	10	0	0				
SQUASH	135	257	7	0	18	17	-	-
SWEET CORN	203	6982	34	4501	21	196	-	-
TOMATOES	129	214	3	0	14	13	-	-
TURNIPS	3	0	1	0	1	(D)	-	-
TURNIP GREENS	2	0	0	0				
VEGETABLES, MIXED	4	0	0	0	2	(D)	-	-
VEGETABLES, OTHER	15	37	0	0	1	(D)	-	-
WATERMELONS	6	3	0	0				

As is evidenced in the following table, fruit and berry production in the region is varied, and consists mostly of small producers. The influence of the Great Lakes Region on grape production is also apparent with more than 90% of the fruit and nut acreage represented by grapes. Cattaraugus County has very little production of any fruits or nuts and production is dominated by small producers. Notable local production can be found in grapes and berries.

Berry farms at the local and regional level represent very modest production levels and are likely driven by direct, fresh market demands.

Fruits, Nuts, and Berries (by type)	Fruit Production			
	40-mile Market		Cattaraugus County	
	Farms	Bearing Acres	Farms	Bearing Acres
APPLES	175	336	24	50
APRICOTS	4	(D)		
CHERRIES, SWEET	47	112	4	2
CHERRIES, TART	23	1	2	(D)
GRAPES	674	20,603	25	357
NECTARINES	5	(D)		
PEACHES, ALL	49	34	2	(D)
PEARS, ALL	41	8	3	1
PERSIMMONS	3	(Z)		
PECANS	2	(D)		
PLUMS AND PRUNES	22	3		
HAZELNUTS (FILBERTS)	2	(D)	1	(D)
WALNUTS (ENGLISH)	3	(D)		
OTHER FRUITS AND NUTS	20	(D)	8	(D)
BERRIES, ALL	213	456	41	119

D = not reported due to potential to disclose individual operation characteristics.

Agricultural Support Industries

Agriculture does not exist in a vacuum. It requires both input and output industries to survive, the following analysis uses data from I-Market and Implan to assess the conditions of these support industries. Additional detail on the farm support sectors including sales, employment and firm numbers can be found on the following tables. *Note: The following tables rely on survey data that is known to be inaccurate at the firm level and should be used to assess trends only.*

Over the last six-years, the number of local service providers and primary market outlets declined while the region has seen considerable growth across all input and output sectors. Notably, much growth is related to the dairy and livestock sectors and this growth is occurring in neighboring counties. The net result has meant little in terms of market change to farmers, except that local farmers must travel farther for services and to reach markets. In summary, input and marketing options are plentiful and varied.

Cattaraugus County Agribusiness Summary										
SIC Code and Description	Second Quarter 2000				Second Quarter 2006				Percent Change 2000 to 2006	
	Estimates				Estimates				Estimates	
	Firms	Employment	Sales (Millions)		Firms	Employment	Sales (Millions)	Firms	Employment	Sales (Millions)
711 Soil preparation services	1	2	0.1		1	2	0.1	0%	0%	0%
721 Crop planting and protection					1	3	0.1			
723 Crop preparation services for market	2	19	N/A					-100%	-100%	
741 Veterinary services for livestock	2	8	0.3		1	2	0.1	-50%	-75%	-67%
742 Veterinary services, specialties	9	51	1.5		8	44	1.7	-11%	-14%	13%
751 Livestock services, except veterinary	3	9	0.4		3	12	0.4	0%	33%	0%
752 Animal specialty services	11	17	1.1		17	20	1.6	55%	18%	45%
2011 Meat packing plants	1	6	0.3		1	6	1	0%	0%	233%
2015 Poultry slaughtering and processing	1	1	0.1					-100%	-100%	-100%
2024 Ice cream and frozen deserts					1	9	0.5			
2041 Flour and other grain mill products	1	32	2.5		1	25	4	0%	-22%	60%
2048 Prepared feeds, nec	1	3	5.4					-100%	-100%	-100%
2099 Food preparations, nec	1	N/A	N/A		1	1	0.1	0%		
5083 Farm and garden machinery	4	16	0.5		2	6	0.8	-50%	-63%	60%
5153 Grain and field beans	1	2	0.9					-100%	-100%	-100%
5154 Livestock	4	60	9.4		3	27	4	-25%	-55%	-57%
5159 Farm-product raw materials, nec	1	2	0.2		2	6	1.2	100%	200%	500%
5191 Farm supplies	5	24	6.1		2	14	2.6	-60%	-42%	-57%
Total	48	252	28.8		44	177	18.2	-8%	-30%	-37%

Source: Dunn and Bradstreet MarketPlace

40-Mile Region Agribusiness Summary										
Second Quarter 2000				Second Quarter 2006				Percent Change 2000 to 2006		
Estimates				Estimates				Estimates		
SIC Code and Description	Firms	Employment	Sales (Millions)	Firms	Employment	Sales (Millions)	Firms	Employment	Sales (Millions)	
711 Soil preparation services	8	43	2.1	14	84	6.8	75%	95%	224%	
721 Crop planting and protection	6	35	2.5	10	88	3.6	67%	151%	44%	
722 Crop harvesting	5	13	0.7	14	54	4.9	180%	315%	600%	
723 Crop preparation services for market	8	62	11.5	11	117	15.5	38%	89%	35%	
741 Veterinary services for livestock	7	62	2.5	8	49	2.1	14%	-21%	-16%	
742 Veterinary services, specialties	164	1,312	40.3	264	2,329	67.9	61%	78%	68%	
751 Livestock services, except veterinary	20	62	3.4	18	118	19.4	-10%	90%	471%	
752 Animal specialty services	159	338	15.5	366	1,026	35.8	130%	204%	131%	
761 Farm labor contractors				2	5	0.7				
762 Farm management services	6	39	2.2	14	130	6	133%	233%	173%	
2011 Meat packing plants	9	150	51.8	12	240	161	33%	60%	211%	
2013 Sausages and other prepared meats	10	726	171.3	15	1,087	225.3	50%	50%	32%	
2015 Poultry slaughtering and processing	4	17	0.9	4	317	171.3	0%	1765%	18933%	
2022 Cheese; natural and processed	5	566	797.6	7	621	838.6	40%	10%	5%	
2023 Dry, condensed and evaporated dairy products	1	240	N/A	7	213	1.6	600%	-11%		
2024 Ice cream and frozen deserts	7	608	111.7	11	650	155.8	57%	7%	39%	
2026 Fluid milk	6	539	50.3	9	895	388.1	50%	66%	672%	
2032 Canned specialties	1	1	0.1	4	13	0.8	300%	1200%	700%	
2033 Canned fruits and specialties	12	1,457	1,311.90	23	2,946	2,372.40	92%	102%	81%	
2034 Dried and dehydrated fruits, vegetables and soup mixes	1	5	N/A	2	249	32.5	100%	4880%		
2035 Pickles, sauces, and salad dressings	8	62	4.3	8	397	1.7	0%	540%	-60%	
2037 Frozen fruits and vegetables				4	346	4.1				
2038 Frozen specialties, nec	3	779	51	4	732	2.4	33%	-6%	-95%	
2041 Flour and other grain mill products	5	393	3.2	5	172	4.7	0%	-56%	47%	
2043 Cereal breakfast foods				1	3	0.3				
2045 Prepared flour mixes and doughs	1	41	3.5	1	45	5	0%	10%	43%	
2046 Wet corn milling				1	7	N/A				
2047 Dog and cat food	4	272	0.4	5	305	0.5	25%	12%	25%	
2048 Prepared feeds, nec	5	71	8.2	6	129	7.9	20%	82%	-4%	
2077 Animal and marine fats and oils				2	42	N/A				
2091 Canned and cured fish and seafoods				2	4	0.1				
2092 Fresh or frozen packaged fish				2	31	N/A				
2096 Potato chips and similar snacks	1	1	0.1	4	87	N/A	300%	8600%		
2098 Macaroni and spaghetti				2	5	0.3				
2099 Food preparations, nec	29	254	22.2	30	422	61.9	3%	66%	179%	
5083 Farm and garden machinery	39	165	10.6	53	239	29	36%	45%	174%	
5153 Grain and field beans	16	103	98.8	17	93	47.9	6%	-10%	-52%	
5154 Livestock	9	91	16.9	13	57	12.5	44%	-37%	-26%	
5159 Farm-product raw materials, nec	4	11	2.1	10	23	3.9	150%	109%	86%	
5191 Farm supplies	54	389	72.9	66	485	125.3	22%	25%	72%	
Total	617	8907	2870.5	1051	14855	4817.6	70%	67%	68%	

Source: Dunn and Bradstreet MarketPlace

Quantifying the economic impact of Cattaraugus County's agricultural sector is an important tool for allocating investment resources, whether from the public or private sector. There are two common methods for measuring the economic impact of any sector of the economy. The first is directly measuring a sector's economic value of output, employment, proprietors' income, etc. However, this only measures the direct value of a sector's importance. Since economic output does not happen in a vacuum, analysts often use multipliers as a secondary measure. Multipliers measure how goods, services, and labor from an economy are used to produce other outputs (sometimes referred to as upstream effects).

Multipliers are most often used to assess the degree to which an industry is linked to other sectors within a local economy by measuring what are known as backward linkages. In layman's terms, backward linkages are a measure of how an industry's sales, employment, value-added, and a host of other factors stimulate sales, employment, etc. from the industries and sectors from which they purchase. For instance, in the dairy industry, backward linkages would include where the dairy farm makes expenditures on fuel, feed, insurance, dairy equipment, veterinary services,

Agribusiness Related Multipliers (2002)				
Industry Code	Sector Name	Output	Employment	Value-Added
1	Oilseed farming	1,248,416	1,062,325	1,329,140
2	Grain farming	1,220,894	1,043,808	1,311,917
3	Vegetable and melon farming	1,230,226	1,099,980	1,207,797
4	Tree nut farming	1,271,190	1,123,777	1,292,708
5	Fruit farming	1,266,675	1,077,195	1,275,135
6	Greenhouse and nursery production	1,300,079	1,041,384	1,224,981
10	All other crop farming	1,243,052	1,148,119	1,278,894
11	Cattle ranching and farming	1,722,462	1,498,713	4,216,758
12	Poultry and egg production	1,222,326	1,358,876	1,356,580
13	Animal production, except cattle and poultry	1,428,410	1,099,103	2,281,206
14	Logging	1,338,808	1,327,695	1,604,441
18	Agriculture and forestry support activities	1,568,375	1,061,201	1,593,058
19	Oil and gas extraction	1,284,225	1,063,196	1,309,961
24	Stone mining and quarrying	1,306,034	1,223,495	1,310,879
25	Sand, gravel, clay, and refractory mining	1,321,929	1,106,235	1,285,950
27	Drilling oil and gas wells	1,346,254	1,237,799	1,373,585
28	Support activities for oil and gas operations	1,406,521	1,062,258	1,335,573
30	Power generation and supply	1,272,373	2,278,072	1,220,203
36	New farm housing units and additions and alte	1,497,818	1,731,678	2,124,022
42	Maintenance and repair of farm and nonfarm re	1,490,139	1,472,893	1,786,740
47	Other animal food manufacturing	1,268,910	1,951,983	2,860,328
60	Frozen food manufacturing	1,444,398	1,527,133	2,270,309
64	Cheese manufacturing	2,135,262	7,804,773	5,072,401
67	Animal, except poultry, slaughtering	2,196,493	7,773,705	5,859,401
73	Bread and bakery product, except frozen, manu	1,321,113	1,170,055	1,339,062
75	Mixes and dough made from purchased flour	1,258,637	1,380,435	1,430,517
101	Textile bag and canvas mills	1,327,234	1,094,913	1,622,587
109	Leather and hide tanning and finishing	1,888,576	2,065,404	2,394,451
111	Other leather product manufacturing	1,310,594	1,031,399	1,219,489
112	Sawmills	1,573,235	1,549,976	1,871,783
118	Cut stock, resawing lumber, and planing	1,798,747	2,153,413	2,758,353
120	Wood container and pallet manufacturing	1,691,202	1,215,489	1,753,385
123	Miscellaneous wood product manufacturing	1,596,944	1,460,529	1,782,835
126	Paperboard container manufacturing	1,281,391	1,255,091	1,582,076
135	All other converted paper product manufacturi	1,322,612	1,321,864	1,737,731
262	Sawmill and woodworking machinery	1,394,389	1,291,550	1,793,076
267	Food product machinery manufacturing	1,461,358	1,310,195	1,577,369
362	Wood kitchen cabinet and countertop manufactu	1,546,144	1,200,306	1,672,249
364	Nonupholstered wood household furniture manu	1,548,193	1,332,975	1,888,686
369	Custom architectural woodwork and millwork	1,488,701	1,727,120	2,630,480
370	Office furniture, except wood, manufacturing	1,384,318	1,424,779	1,725,180
371	Showcases, partitions, shelving, and lockers	1,400,322	1,187,106	1,528,653
397	Scenic and sightseeing transportation and sup	1,487,658	1,182,597	1,814,965
449	Veterinary services	1,418,494	1,114,365	1,616,656
456	Travel arrangement and reservation services	1,464,840	1,202,503	1,818,251

Source: Implan 2002

utilities, and so forth. Multipliers for sales, or output, will measure how many times that a dollar of output on the dairy farm circulates through the local economy. In this case, a multiplier of 1 is simply a measure of the output of the dairy farm. It measures no other effect on the economy. Whereas, a multiplier of 2 would indicate that a dollar of sales on the farm created an additional dollar of sales in the community. A multiplier of two would be considered a relatively strong multiplier because each dollar of output on the farm is stimulating another dollar of output elsewhere. *Note: As industries become more reliant global sourcing and outsourcing, the trend over the last decade or so has been to lower multipliers.*

For the purposes of this study, the project team wanted to explore the level of integration and backward linkages, of the various agricultural and related sectors in Cattaraugus County. The project team felt that a multiplier of 1.5 or higher for output and employment would indicate a relatively strong correlation between industries and therefore developing the upstream marketing for these industries would have a significant trickle down effect on the economy. Reviewing the chart on the prior page, several industries provide strong backward linkages. Not surprisingly, these industries tend to focus on dairy and cattle as well as forest products. In all, ten industries exceed the 1.5 threshold for output and nine exceed the 1.5 threshold for employment. Value Added multipliers met the threshold within twenty-eight sectors; indicating the strong rental arrangements in industry.

Cattaraugus County's input-output results indicate that the economy is specialized within industry sectors related to animal based agriculture and forest products. These relationships are well developed, but may offer some opportunity for further leverage.

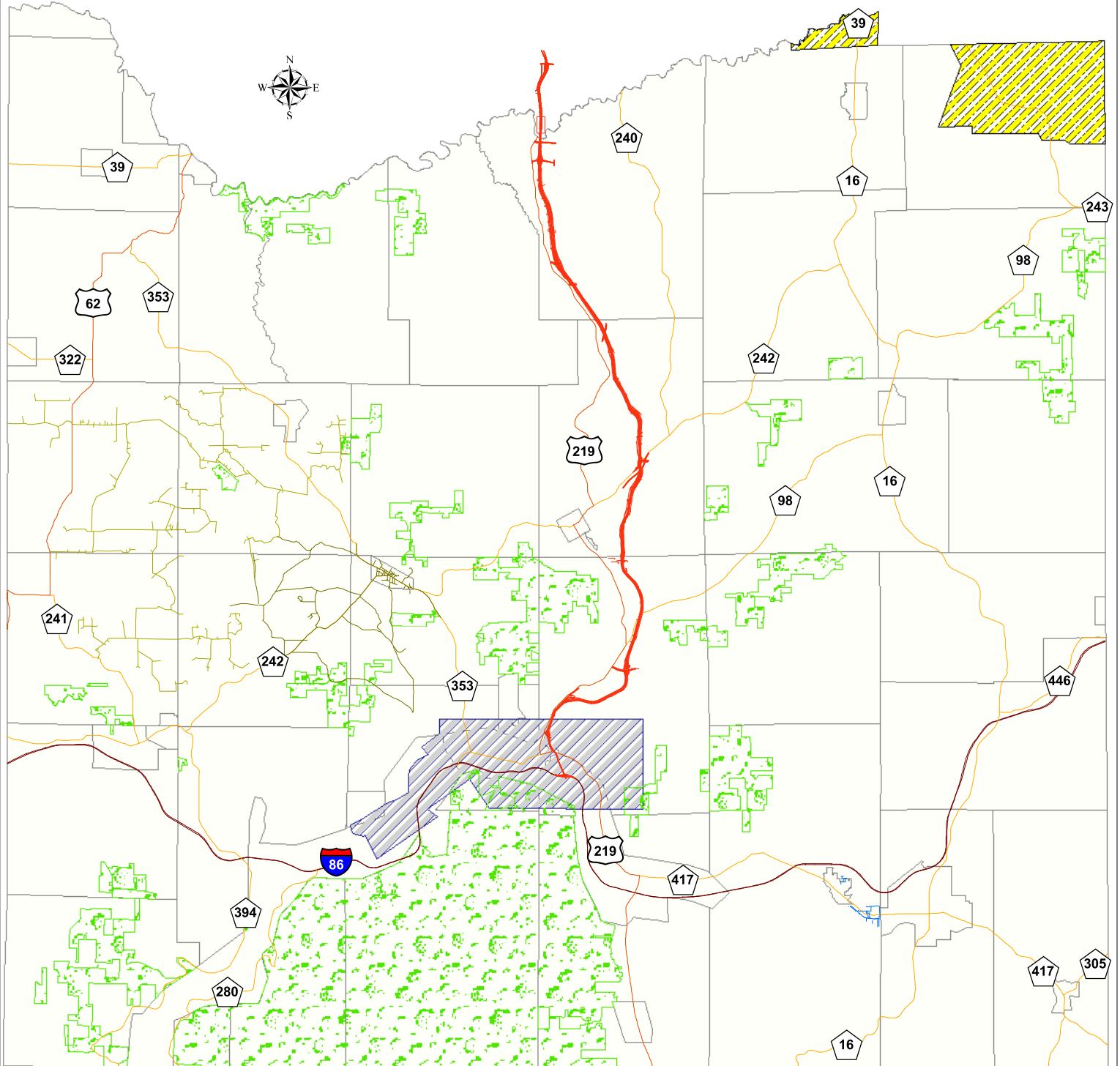
Implications for the Cattaraugus County Agricultural and Farmland Protection Plan

Agriculture in Cattaraugus County is declining, but remains a key element in the County economy. Looking to the region, agriculture is growing in strength, led, in part, by the growth of the dairy and vegetable sectors to the north. Traditional farming based on livestock remains the economic mainstay of agriculture. High value agriculture such as nursery and greenhouse as well as small “farmettes” are rising in prominence, but do not dominate the production scenery. Implications for the Agriculture and Farmland Protection Plan include:

- Local agriculture is highly influenced by the health of the regional dairy industry. The same can be said for the production services and input industries. Therefore, the health of dairy strongly influences the health of the agricultural industry.
- While not as predominant, the growth of the Nursery and Greenhouse and Vegetable sectors indicates that agricultural transition is successfully underway.
- Growth in part-time and beginning farmers is modest, but evident in the statistics. Growth in this segment generally indicates the need for additional business development and marketing support due to time limitations and limited experience of farmers.
- The equine industry, while hard to quantify, does seem to offer an economic development opportunity though most activity is centered on Erie County.
- There has been some growth in meat goats and lambs on small operations indicating an opportunity to develop ethnic product markets for H’Alal products.
- Cattaraugus County relies on the broader region for agricultural services and supply.
- Service and supply industries are geared to support livestock and field crop operations. Specialty firms supporting equestrian oriented farms and nursery and greenhouse operations are also growing in importance regionally and may support operations in Cattaraugus County.
- While input and output industries seem strong, concerted development efforts can support further development of these sectors and enhance backward linkages.

The agricultural industry remains just that, an industry in Cattaraugus County. Current conditions show that the industry is in slow decline, but well supported by a vibrant regional agricultural economy. Furthermore, the industry is well integrated within a broader economy and provides a significant source of employment and proprietors’ income. However, these conditions could change rapidly, especially with changes in the dairy markets and should be managed to reduce this risk. Directed economic development support is one means to approach this issue and to keep the region’s rural economy balanced.

PARTIAL INFRASTRUCTURE & STATE RECREATION LANDS

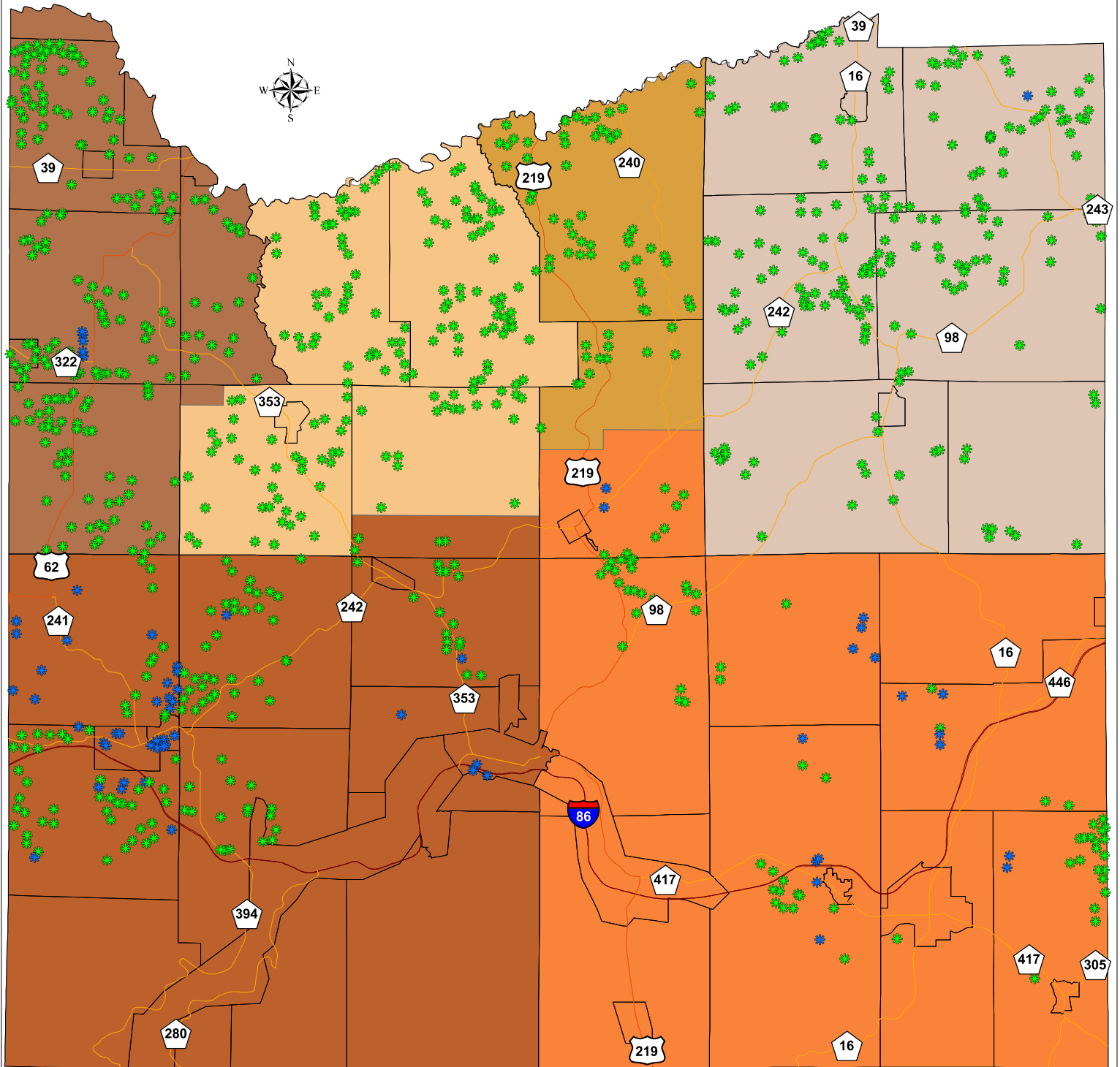


Legend

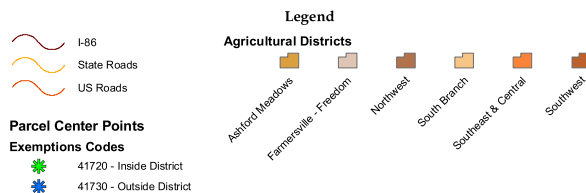
- I-86
- State Roads
- US Roads
- Proposed 219
- Allegany Town Water Lines
- Steuben Power Lines
- Little Valley Municipal Electric
- Salamanca Electric Utility Boundaries
- Arcade Electric Boundaries
- State Recreation Lands

Map Created by:
Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324
May '06

AGRICULTURAL DISTRICT BOUNDARIES & PARCEL POINTS WITH AN AG EXEMPTION



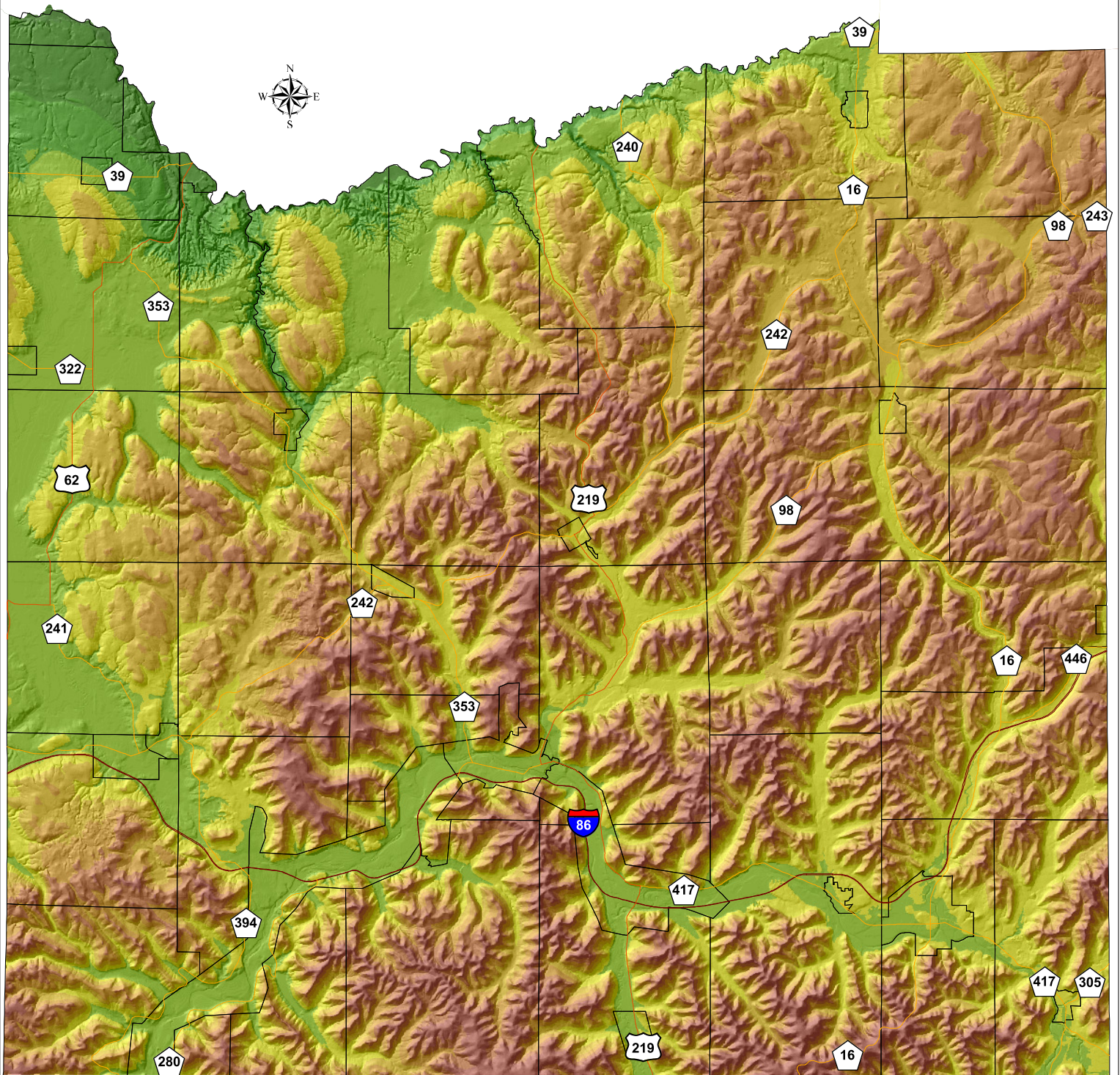
0 2 4 8 Miles



Map Created by:
Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324
May '06

CATTARAUGUS COUNTY

3D ELEVATIONS

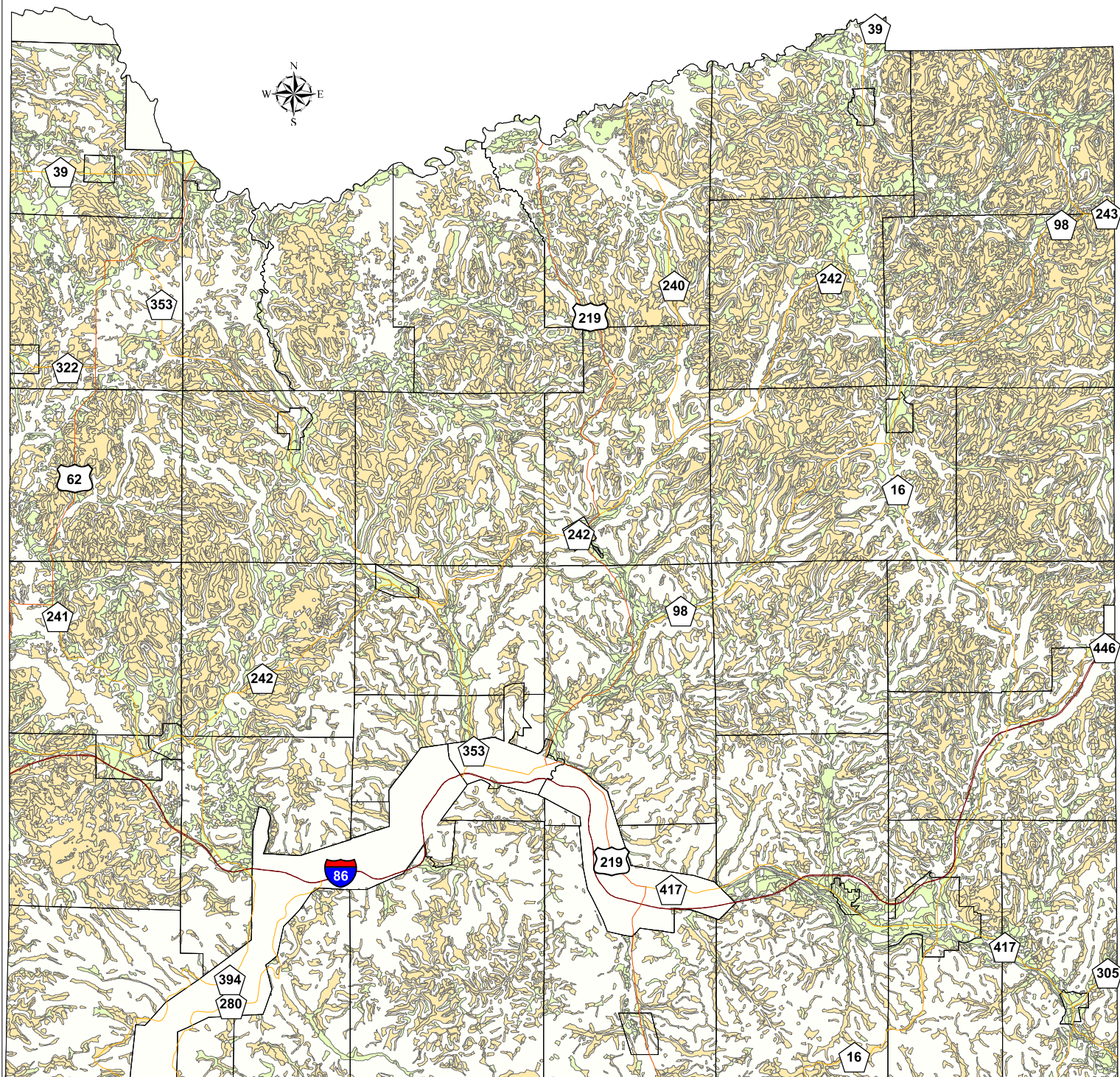


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Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324
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CATTARAUGUS COUNTY

SOIL TYPES



0 2 4 8 Miles

Legend

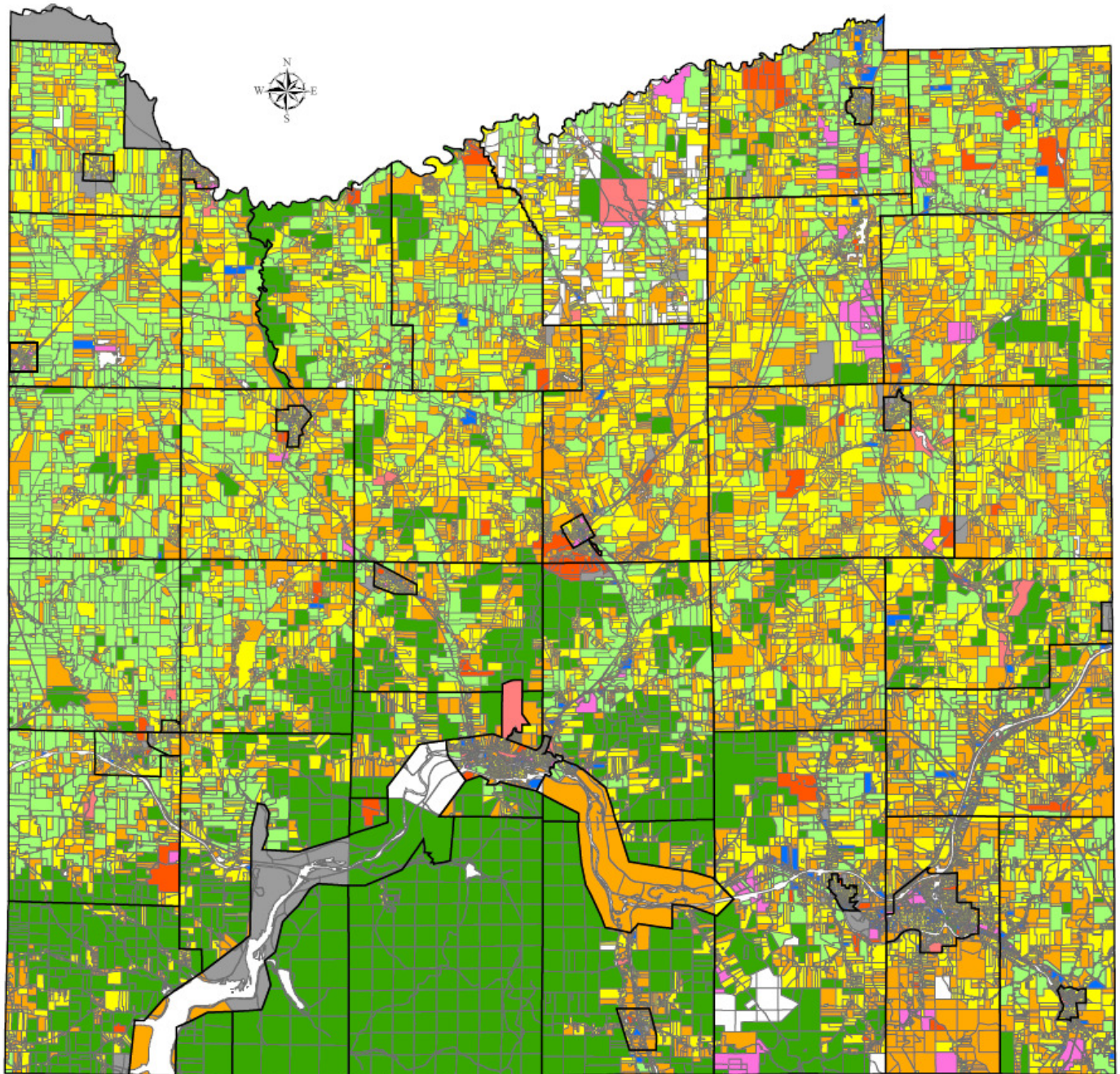
- I-86
- State Roads
- US Roads

Soil Farm Classes

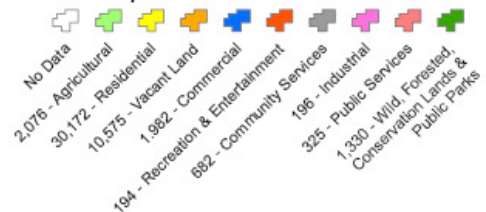
- All areas are prime farmland
- Farmland of statewide importance

Map Created by:
Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324
May '06

PARCEL CLASS CODES

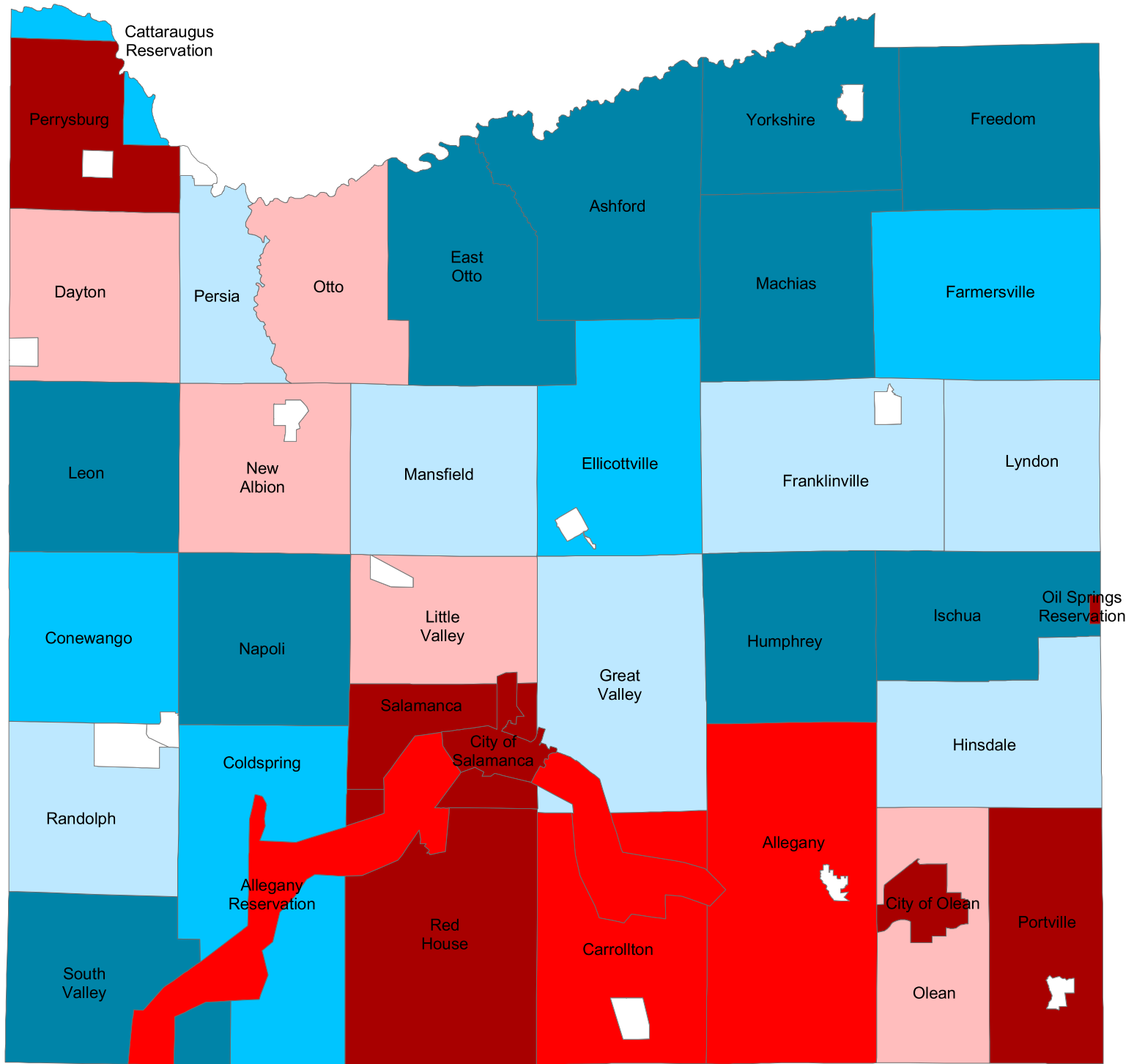


Parcel Count per Class Code

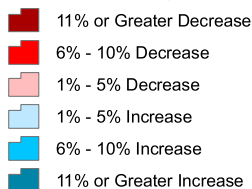


Map Created by:
Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@cattco.org
(716) 938-9111 ext. 2324

Census Population Change 1980 through 2000 Per Town/City/Reservation



Population Change from 1980 - 2000

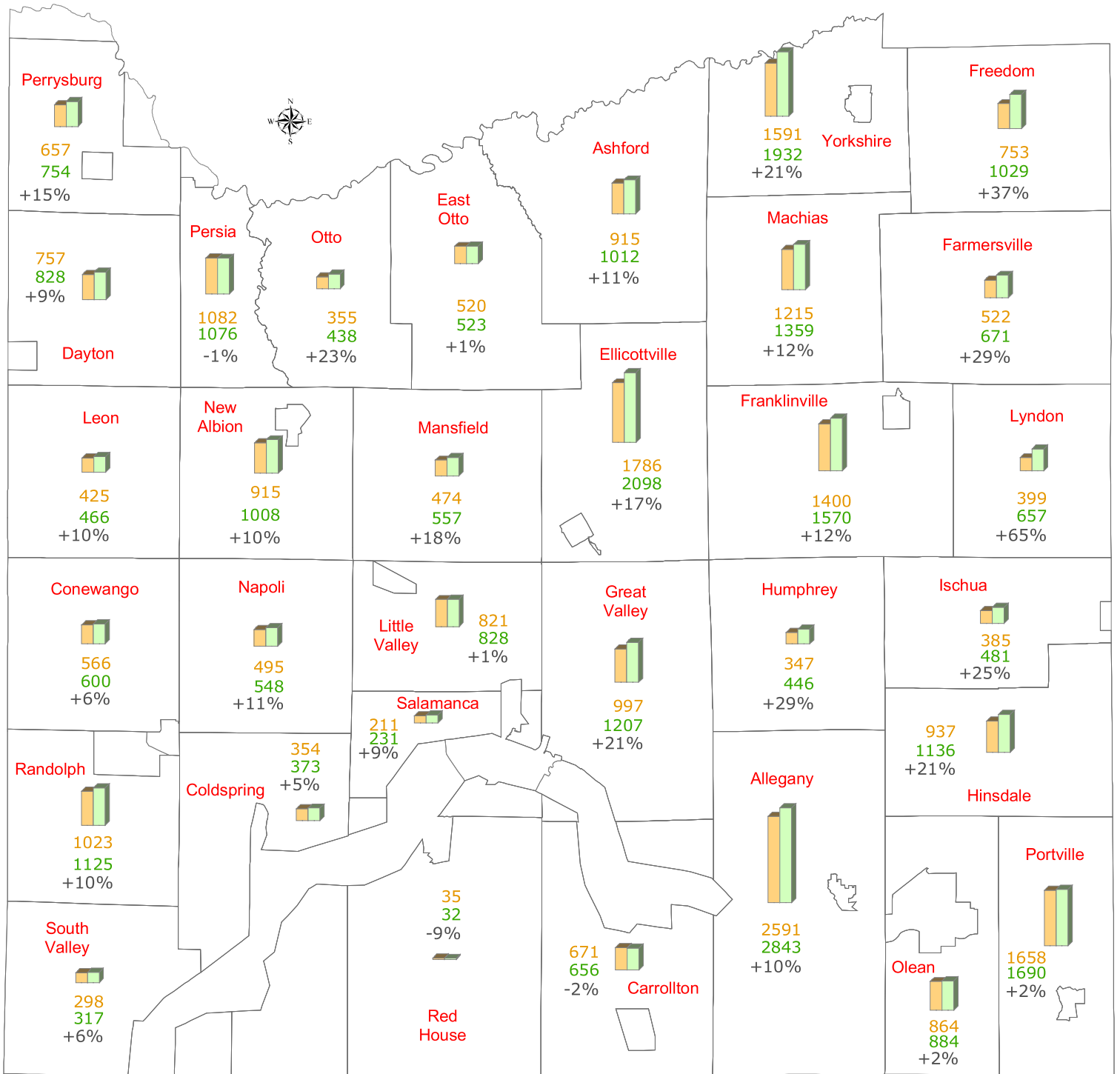


0 2 4 8 Miles



Map Created by:
Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324

1990, 2000 Census of Housing Units



1,400



Housing Units 1990



Housing Units 2000

% = Percentage Change from 1990 to 2000

0 2 4 8 Miles

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Daniel T. Martonis
GIS Coordinator
Cattaraugus County
dtmartonis@catco.org
(716) 938-9111 ext. 2324

CATTARAUGUS COUNTY, NEW YORK

Prioritizing Agricultural Land

Objectives:

- ❖ To assist in ranking projects for agricultural and farmland protection programs, such as a Purchase of Development Rights program;
- ❖ To provide information for the county and towns to identify important farmland and to use in land planning efforts.

Ranking Formula:

Farm Characteristics

1. Soil Quality (40 points)
Using the Department of Agriculture and Markets soil group classification, rate the soils for agricultural productivity. Priority will be given to soils of prime and statewide importance as well as unique soils.
2. Size of Application (15 points)
Priority will be given to parcels with a greater quantity of tillable acres.

Location Factors

3. Proximity to Other Farm Parcels (10 points)
An active farming area provides a setting that is more supportive of farming and farm practices. Emphasis will be given to farms that are located near other actively farmed parcels.
4. Within an Agricultural District (5 points)
Agricultural districts can strengthen farming by providing important incentives and protections for farms. Priority is given to projects located within an agricultural district.

Development Pressure

5. Public Road Frontage (15 points)
Priority is given to projects with significant road frontage.
6. Proximity to Water and/or Sewer (10 points)
Priority is given to projects that are closer to public water and sewer lines with the highest priority given to parcels that have water or sewer lines at road frontage.

7. Proximity to Route 219 Interchanges (10 points)
Priority is given to projects that are adjacent to or very close to a current or proposed Route 219 interchange.
8. Area Facing Significant Housing Development Pressure (10 points)
Priority will be given to projects that are near new housing developments or have significant scattered lot residential development pressure.

Environmental Benefits

9. Buffers Significant Public Natural Resource (15 points)
Priority is given to projects that are adjacent to, or buffer, a significant or unique public natural resource.

For the New York State Farmland Protection Program purchase of development rights grants, the project must also meet the following criteria:

Prospects for Succession as a Farm

10. Level of Farm Management Demonstrated by Current Owner (15 points)
This factor gives great emphasis to owners who demonstrate a high level of farm management success.
11. Level of Farm Investments (10 points)
Farm operations that have made extensive agricultural operation investments (such as in barns, tile drainage, manure storage, or other soil and water conservation measures) will be easier to keep in agriculture than farms where substantial investments are needed to update the business.