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Trend Analysis of New York State Food and Beverage Manufacturing Industries: Growth, Profitability, and Competitive Positioning

Melike Celenk and Todd M. Schmit

Charles H. Dyson School of Applied Economics and Management
SC Johnson College of Business
College of Agriculture and Life Sciences
Cornell University, Ithaca, NY 14853-7801

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Abstract

This study examines growth and performance patterns in New York State's food and beverage manufacturing industry over 2012–2022, using U.S. Economic Census, Nonemployer Statistics, and County Business Patterns data at the 4-digit NAICS level. Four principal measures—sales, employment, payroll, and establishment counts—are benchmarked against national, regional (Northeast), and top-state peers, alongside a cost-share profitability proxy, non-employer trends, and firm-size distributions.

Aggregate food and beverage manufacturing grew modestly in real output, but with consistent strong establishment and employment growth that outperformed all other aggregate (non-food-and-beverage) manufacturing sectors in the state. Expansion over this period concentrated in alcoholic beverages (breweries and distilleries) and dairy foods leading food-sector revenue growth. Profitability analysis places New York food manufacturing 1.68 percentage points above the national margin—driven by lower material costs but coupled with higher labor-cost shares and below-average capital expenditure—while beverage manufacturing trails the national margin, chiefly through the non-alcoholic subsector.

Three patterns emerge across sectors: a volume-up, value-down dynamic in which rising firm and employment counts outpace real revenue growth; a hollowing of mid-sized establishments, with growth concentrated among the smallest non-employer firms and the largest establishments; and a divergence between where margins are strongest (small, high-margin distilleries and breweries) and where employment and output actually reside (dairy, bakery, and meat processing), which run on thinner margins).

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[1] Graduate Research Assistant and Professor, Respectively, Charles H. Dyson School of Applied Economics and Management, Cornell University, Ithaca, NY, USA.

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Introduction

According to the 2022 Economic Census, New York's (NY) food and beverage manufacturing industry employed over 63,000 individuals and generated more than $28 billion in annual revenue (U.S. Census Bureau, 2024). The industry has demonstrated resilient annual growth in employment, sales, and establishment counts across sectors in the state, with the alcoholic beverages subsector contributing notably to more recent expansion.

Given food manufacturing sector's economic importance to agricultural and food systems development in NY, this research aims to examine recent growth patterns at the industry level within and across subsectors, measuring NY's performance against regional and national trends using secondary U.S. Economic Census data. We examine the food and beverage manufacturing sector at the 4-digit NAICS level over the period 2012–2022.[2]

This analysis identifies growth rates across the sector and compares them along multiple dimensions to provide broader context. Our principal performance measures are sales, employment, payroll, and the number of establishments, each of which speaks to a distinct aspect of the industry. We further consider profitability, the distribution of establishments by employee size, and the role of nonemployer firms. We aim to identify which subsectors are performing well and which are not, and to assess their performance relative to other manufacturing sectors and to their regional and national peers.

Data Collection

The analysis covers the period from 2012 through 2022 from the U.S. Census Bureau, including data primarily from the Economic Census and Non-Employer Statistics. Growth rates are calculated as average annual changes over the period. To compute real monetary changes in revenue over time, we utilize the Producer Price Index (PPI) from the U.S. Bureau of Labor Statistics (2026) for each sector using their respective PPI series.

For cases of data nondisclosure, we address them by drawing on alternative data sources or by using reference points from years other than our target years.[3] In the first case, Economic Census data was supplemented with annual County Business Patterns data, also from the U.S. Census Bureau, and with IMPLAN data.[4] In the second case, we use Economic Census data from 2017 as an intermediate reference point. For ease of exposition, a detailed discussion of our real growth rate calculation and nondisclosure data processing is available in Appendix A for the interested reader.

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[2] The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

[3] Under the title 13 of the U.S. Code, the Census Bureau is legally required to protect the confidentiality of individual businesses. Some industries contain only a small number of establishments, making it possible to infer information about individual firms from published aggregate statistics. As a general observation, the availability of publicly reported data declines as the NAICS classification becomes more detailed.

[4] Initially developed by the U.S. Forest Service, the IMPLAN (Impact for Planning) data and economic impact modeling system has been maintained since 1993 by IMPLAN LLC. One of several generally available economic impact modeling systems, IMPLAN combines several advantageous features that, in combination, explain its widespread use by government, academia, and economics consultants. To develop state or regional inter-industry models, the IMPLAN system draws upon and integrates a large number of basic data sets from a variety of sources.

Industry Trends

An overview of NY food and beverage manufacturing sectors with paid employees is displayed in Table 1A. As of 2022, more than 2,000 food manufacturing and 680 beverage manufacturing establishments with employees were operating in the state. Food manufacturing establishments have grown in number at 0.12% annually, lagging behind the national rate of 1.75%. Growth in payroll, employment and output was comparably below national estimates. Beverage manufacturing establishments outpaced the national average in the growth of establishments but underperformed on other metrics. In NY and nationwide, beverage manufacturing posted stronger growth across establishments, payroll, and employment relative to food manufacturing, even as sales failed to keep pace.

Table 1A: Food manufacturing activity and annual growth rates by aggregate sector, New York and United States, 2012 – 2022.[1]

Sector	Establishments (Number)		Sales ($ Million)			Payroll ($ Million)		Employees (Thousand)	
& Area	2022	%G	2022	%G_N	%G_R	2022	%G_N	2022	%G
Food (311)									
NY	2,014	0.12	25,254	3.42	0.63	2,696	4.91	52.6	1.46
USA	27,766	1.75	1,013,907	4.08	1.15	85,844	6.24	1,594.3	1.76
Beverage (3121)									
NY	687	17.26	3,725	1.46	-0.61	578	10.47	10.8	7.98
USA	11,589	14.63	120,367	2.18	-0.02	13,810	11.58	246.6	9.23
Food and Beverage (311 + 3121)									
NY	2,701	2.05	28,979	3.13	0.45	3,274	5.66	63.4	2.21
USA	39,355	3.89	1,134,274	3.85	1.01	99,654	6.82	1,840.1	2.40

Source: Economic Census (2024)

[1] Industry NAICS codes in parentheses. National estimates exclude New York. %G = annualized growth rate, 2012-2022. For output, %G_N = nominal growth rate, %G_R = real growth rate (constant dollars), deflated by the U.S. Producer Price Index (PPI) for the relevant NAICS code.

Table 1B turns to individual subsectors within NY's food and beverage manufacturing industry. Bakery & Tortilla manufacturing represents the largest employment segment with nearly 20,000 employees. This is followed by Dairy manufacturing (10,600) and Other Food manufacturing (7,000). In terms of nominal revenue, the Nonalcoholic Beverage sector is the only sector that has declined over the ten-year period. Grain & Oilseed Milling and Fruit & Vegetable manufacturing have experienced relatively low growth rates, while Dairy manufacturing is leading with 4.80% annual growth. Bakery & Tortilla manufacturing and Sugar & Confectionery manufacturing follow dairy at 4.61% and 4.02%, respectively.

As discussed above, high growth in beverage manufacturing is driven by the alcoholic beverage sectors (Breweries, Wineries, and Distilleries). However, these sectors have comparatively underperformed in terms of revenue growth. Within the sector, Breweries and Distilleries have outpaced Wineries (an older and more established sector in NY) in all categories. While Breweries have led in the growth of establishments and revenue, distilleries have shown stronger performance in payroll and employment growth. While growth in Distilleries is strong in general, they are more recently the result of smaller-scale business growth, contributing to their relatively low employment within the state currently.

Table 1B: Food manufacturing activity and annual growth rates by individual sector, New York and United States, 2012 – 2022.[1]

Sector & Area	Establishments (Number) 2022	%G	Sales ($ Million) 2022	%G_N	%G_R	Payroll ($ Million) 2022	%G_N	Employees (Thousand) 2022	%G
Animal Food (3111)									
NY	58	5.26	2,012	2.02	-0.09	120	5.27	1.6	1.37
USA	1,858	1.25	72,719	2.93	0.66	3,850	7.98	60.3	3.87
Grain and Oilseed (3112)									
NY	32	3.33	1,886	0.45	-1.23	102	7.59	1.3	3.50
USA	949	2.12	128,546	2.90	0.82	3,995	3.77	57.0	1.01
Sugar & Confectionary (3113)									
NY	128	-0.86	1,286	4.02	2.08	182	8.07	3.6	3.47
USA	1,836	0.70	40,842	2.70	0.94	4,698	6.12	82.3	2.27
Fruit, Vegetable, Specialty (3114)									
NY	104	2.68	2,273	0.69	-1.59	316	6.36	5.6	1.38
USA	1,948	2.01	87,443	2.90	0.15	8,997	4.16	163.3	0.13
Dairy (3115)									
NY	119	0.92	8,725	4.80	1.54	628	6.01	10.6	2.83
USA	1,577	0.60	148,520	4.63	1.41	9,606	5.86	151.8	2.37
Animal Slaughter & Meat (3116)									
NY	139	0.15	1,693	1.91	-0.77	155	0.38	2.8	-3.17
USA	3,731	0.78	301,954	5.24	1.81	27,027	7.65	532.3	1.02
Fish & Seafood (3117)									
NY	8	-5.29	157	2.08	-1.18	28	0.09	0.3	-1.25
USA	487	-1.60	14,472	3.62	-0.06	1,591	2.90	30.9	-0.50
Bakery & Tortilla (3118)									
NY	1,151	-0.67	3,746	4.61	1.47	774	5.21	19.5	1.55
USA	10,828	1.62	80,309	2.94	0.16	12,609	4.04	274.9	1.39
Other Food (3119)									
NY	275	3.16	3,412	3.50	0.70	384	2.79	7.0	1.13
USA	4,552	5.12	139,165	5.13	1.99	13,480	9.35	241.8	5.80
Nonalcoholic Beverage (31211)									
NY	57	-1.09	1,558	-0.94	-3.18	218	6.61	3.2	1.64
USA	1,256	1.12	49,989	0.67	-1.97	4,813	6.93	78.3	2.94
Brewery (31212)									
NY	311	69.74	1,497	3.31	1.38	217	13.57	4.6	21.89
USA	4,782	47.27	27,911	0.23	-1.25	3,934	17.81	85.3	24.23
Winery (31213)									
NY	230	6.91	541	1.11	-0.39	111	10.41	2.3	3.40
USA	4,354	7.39	23,763	5.86	3.72	3,606	10.99	61.2	7.02
Distillery (31214)									
NY	89	58.46	129	2.97	4.05	32	56.48	0.7	58.41
USA	1,197	40.29	18,704	9.65	11.28	1,457	24.51	21.9	21.76

Source: Economic Census (2024)

[1] Industry NAICS codes in parentheses. National estimates exclude New York. %G = annualized growth rate, 2012-2022. For output, %G_N = nominal growth rate, %G_R = real growth rate (constant dollars), deflated by the U.S. Producer Price Index (PPI) for the relevant NAICS code.

When adjusted for inflation, we observe several food and beverage manufacturing sectors with real declines in industry revenue over the ten-year period. While the overall food and beverage manufacturing sector demonstrated modest real growth at an average annual rate of 0.45%, specific categories including Animal Food, Grain & Oilseed Milling, Fruit & Vegetable, Animal Slaughter & Meat, Seafood Processing, Nonalcoholic Beverages, and Wineries have contracted in real terms.

Other Manufacturing Sectors

We next examine aggregate growth trends in food and beverage manufacturing relative to other aggregate manufacturing sectors at (generally) the 3-digit NAICS level (Table 1C). In general, overall growth in food and beverage manufacturing in the state has outperformed non-food manufacturing sectors. In fact, the only sectors that have grown in number of establishments are the Food and the Beverage manufacturing sectors.

Food manufacturing also leads in revenue growth, while Beverage manufacturing demonstrates more modest growth in this category as described above. Computer & Electronics manufacturing also exhibit strong nominal revenue growth at 3.14%, just behind Food manufacturing's 3.42%. This dominance is further reflected in the labor market as other sectors have experienced employment declines whereas the aggregate food and beverage manufacturing sector has grown by 2.21% annually.

Northeast States

Next, we compare NY performance metrics to other states in the Northeast region: Connecticut (CT), Massachusetts (MA), New Jersey (NJ), Ohio (OH), Pennsylvania (PA) and Vermont (VT) (Table 2). Although NY hosts the highest number of establishments in both food and beverage manufacturing, it records the least relative growth over the period evaluated. In Food manufacturing, NY is above average in revenue growth in the region, although below the average for growth in other metrics. In terms of employees, NY ranks third after PA and OH with 52,590 employees. However, the employment growth rate of 1.46% surpasses only VT, which has experienced a decline in workforce numbers. In a relative sense, we observe that NJ, specifically, has outperformed other states across metrics.

In Beverage manufacturing, NY growth metrics outside of revenue are below regional averages to an even greater extent than in Food manufacturing (Table 2). However, this is likely influenced by the relatively larger nonalcoholic beverage sector presence in the beverage sector in NY and that industry's recent performance more broadly (see Table 1B). We observe that CT, specifically, has outperformed other states across all metrics except for revenue growth, where Vermont has grown 8.32% annually. Moreover, the data indicate that growth in the Northeastern region, overall, is lagging national averages. The sole metric where the Northeastern region appears to be superior is in employment growth.

Top State Comparisons

We now examine four manufacturing sectors with key backward linkages to farm production sectors in the state and compare them with leading U.S. states: Fruit & Vegetable, Dairy, Animal Slaughter & Meat, and Alcoholic Beverages (Table 3). For each sector, we identify the top five states based on sales value in 2022.[5]

As expected, Fruit & V manufacturing by scale is largest for CA, but NY had a slightly higher growth rate in establishment counts (2.68% vs. 2.02%). However, NY's annual growth rate in sales was the lowest relative to the top producing states, and where growth in OR was considerably above all states included. That said, growth in employment in NY (1.38%) was second only to WI (2.02%).

[5] Due to nondisclosure issues for beverage manufacturing, we use 2017 sales data as the baseline.

Table 1C: Other sectors' activity and growth rates by aggregate sectors, NY and USA

Sector	Establishments (Number)		Sales ($ Million)			Employees (Thousand)	
&Area	2022	%G	2022	%G_N	%G_R	2022	%G
Textile (313-316)							
NY	1,078	-3.73	2,351	-2.37	-3.80	12.01	-4.11
USA	11,322	-2.11	62,493	-0.60	-2.37	261.3	-2.00
Wood and Paper (321-323)							
NY	2,011	-1.68	13,564	1.89	-1.71	38.15	-1.63
USA	38,991	-0.98	470,123	4.26	-0.07	1,127.2	0.20
Petrol, Chem and Plastics (324-327)							
NY	1,664	-0.94	48,051	2.00	-1.33	83.50	0.84
USA	42,229	0.10	2,204,273	1.52	-1.68	2,154.2	1.89
Metal (331-332)							
NY	2,196	-1.30	23,948	2.44	-1.69	59.41	-0.25
USA	55,190	-0.40	764,812	2.96	-1.35	1,714.1	-0.03
Machine and Transport (333 & 336)							
NY	1,002	-1.99	24,796	0.54	-1.68	61.31	-0.33
USA	32,352	-0.72	1,444,449	2.41	-0.20	2,644.3	1.26
Computer and Electronics (334-335)							
NY	851	-1.98	24,079	3.14	1.48	57.49	-0.28
USA	15,902	-1.14	500,929	1.96	0.45	1,135.6	0.00
Furniture (337)							
NY	815	-2.11	2,697	1.81	-1.50	12.16	-1.69
USA	13,584	-1.09	85,990	3.34	-0.39	366.2	1.19
Miscellaneous (339)							
NY	1,715	-2.49	8,632	0.00	-1.55	26.87	-1.97
USA	23,524	-1.39	153,320	0.91	-0.78	501.8	-0.22
Food (311)							
NY	2,014	0.12	25,254	3.42	0.63	52.6	1.46
USA	27,766	1.75	1,013,907	4.08	1.15	1,594.3	1.76
Beverage (3121)							
NY	687	17.26	3,725	1.46	-0.61	10.77	7.98
USA	11,589	14.63	120,367	2.18	-0.02	246.6	9.23
Food and Beverage (311 & 3121)							
NY	2,701	2.05	28,979	3.13	0.45	63.40	2.21
USA	39,355	3.89	1,134,274	3.85	1.01	1,840.1	2.40
Other Sectors (Aggregate)							
NY	11,332	-1.98	148,117	1.70	-1.23	350.89	-0.63
USA	233,094	-0.76	5,686,388	2.13	-0.78	9,904.79	0.66

Source: Economic Census (2024)

Table 2: Food manufacturing activity and annual growth rates by individual sector: New York, Northeast states, and United States, 2012 – 2022.[1]

Sector	Establishments (Number)		Sales ($ Million)			Payroll ($ Million)		Employees (Thousand)	
& State	**2022**	**%G**	**2022**	**%G_N**	**%G_R**	**2022**	**%G_N**	**2022**	**%G**
Food (311)									
NY	2,014	0.12	25,254	3.42	0.63	2,696	4.91	52.6	1.46
CT	323	1.88	3,326	3.12	0.40	363	4.54	7.3	2.71
MA	599	0.19	10,207	3.47	0.67	1,304	5.55	23.1	1.55
NJ	1,064	2.08	16,671	3.47	0.67	1,91	5.92	36.2	3.03
OH	992	0.91	41,034	3.40	0.62	3,453	5.86	60.2	1.80
PA	1,328	1.31	41,574	2.87	0.20	4,010	4.81	73.5	1.76
VT	203	1.94	3,074	3.12	0.39	265	-0.41	4.7	-1.27
Northeast	4,509	1.29	115,887	3.21	0.46	11,311	5.17	204.9	1.89
USA	27,766	1.75	1,013,907	4.08	1.15	85,844	6.24	1,594.3	1.76
Beverage (3121)									
NY	687	17.26	3,725	1.46	-0.61	578	10.47	10.8	7.98
CT	138	27.30	920	1.16	-0.86	93	71.94	2.1	54.89
MA	205	27.27	2,447	1.07	-0.94	308	11.12	5.8	12.12
NJ	210	24.43	2,443	0.05	-1.77	304	11.62	5.4	11.13
OH	335	18.63	4,509	0.25	-1.61	410	9.16	8.0	8.55
PA	566	23.89	4,727	1.97	-0.20	617	17.43	11.9	15.09
VT	91	20.33	214	8.32	5.01	63	34.82	1.4	30.03
Northeast	1,545	23.08	15,260	0.95	-1.03	1,794	13.91	34.5	13.19
USA	11,589	14.63	120,367	2.18	-0.02	13,810	11.58	246.6	9.23
Food and Beverage (311 and 3121)									
NY	2,701	2.05	28,979	3.13	0.45	3,274	5.66	63.4	2.21
Northeast	6,054	3.57	131,147	2.90	0.26	13,105	5.97	239.4	2.79
USA	39,355	3.89	1,134,274	3.85	1.01	99,654	6.82	1,840.9	2.40

Source: Economic Census (2024)

[1] Industry NAICS codes in parentheses. Regional and national estimates exclude New York. Northeast region includes CT, MA, NJ, OH, PA, and VT. %G = annualized growth rate, 2012-2022. For sales, %G_N = nominal growth rate, %G_R = real growth rate (constant dollars), deflated by the U.S. Producer Price Index (PPI) for the relevant NAICS code.

Table 3: Food manufacturing activity and annual growth rates by selected sectors: New York, Top Five States (by 2022 output), and United States, 2012 – 2022.[1]

Sector & State	Establishments (Number)		Sales ($ Million)			Payroll ($ Million)		Employees (Thousand)	
	2022	%G	2022	%G_N	%G_R	2022	%G	2022	%G
Fruit, Vegetable, & Specialty (3114)									
NY	104	2.68	2,273	0.69	-1.59	315	6.36	5.6	1.38
CA	363	2.02	13,651	1.35	-1.07	1,492	1.57	27.0	-1.52
OH	61	0.17	7,731	3.40	0.55	569	1.94	10.5	-0.40
WI	96	1.57	6,385	3.60	0.71	766	10.48	10.9	2.02
WA	70	-0.79	4,805	3.62	0.72	530	4.24	9.7	-0.77
OR	95	2.34	4,643	8.18	4.31	420	5.58	8.3	0.54
USA	1,948	2.01	87,443	2.90	0.15	8,997	4.16	163.3	0.13
Dairy (3115)									
NY	119	16.44	8,725	4.80	1.54	628	6.01	10.6	2.83
WI	234	4.44	27,239	4.81	1.55	1,772	8.23	28.0	3.74
CA	230	12.33	21,543	3.82	0.78	1,313	3.99	18.9	1.17
MN	56	3.33	7,034	3.46	0.50	360	4.23	5.6	0.48
ID	31	8.24	7,029	13.49	8.31	283	15.40	4.7	8.42
OH	57	6.29	6946	5.84	2.35	423	6.21	6.7	3.41
USA	1,577	0.60	148,520	4.63	1.41	9,606	5.86	151.8	2.37
Animal Slaughter & Meat (3116)									
NY	139	0.15	1,693	1.91	-0.77	155	0.38	2.8	-3.17
TX	296	1.38	29,162	5.54	2.02	2,289	9.37	45.5	1.59
NE	126	0.96	27,990	4.77	1.44	1,784	9.71	30.1	1.56
KS	88	1.43	24,270	7.16	3.29	1,127	9.36	19.5	1.62
IA	156	-0.13	19,863	4.03	0.87	1,798	7.52	32.2	1.35
NC	110	-0.43	15,168	7.63	3.66	1,429	6.39	32.5	0.78
USA	3,731	0.78	301,954	5.24	1.81	27,027	7.65	532.3	1.02
Brewery (31212)									
NY	311	69.74	1,497	3.31	1.38	217	13.57	4.5	21.89
CA	548	42.69	3,083	-1.84	-3.02	632	18.20	12.8	20.06
OH	168	83.33	2,912	0.65	-0.90	190	9.83	3.7	16.19
CO	263	38.70	2,338	-5.28	-7.42	287	ND	4.7	7.36
TX	211	41.46	2,258	-2.80	-3.85	228	9.47	4.1	15.34
GA	104	138.57	2,053	1.04	-2.02	157	7.46	2.7	ND
USA	4,782	47.27	27,911	0.23	-1.25	3,934	17.81	85.3	24.23
Winery (31213)									
NY	230	6.91	541	1.11	-0.39	111	10.41	2.3	3.40
CA	1,736	5.34	19,273	4.74	2.76	2,550	8.66	36.3	4.27
WA	400	6.88	1,111	2.60	0.90	231	18.26	3.8	6.20
OR	342	8.10	802	16.61	13.03	182	20.74	3.6	10.57
TX	246	14.36	411	74.40	63.02	92	64.64	2.2	32.49
NJ	37	9.47	285	8.48	4.64	38	ND	0.7	9.18
USA	4,354	7.39	23,763	5.86	3.72	3,606	10.99	61.2	7.02
Distillery (31214)									
NY	89	58.46	129	2.97	4.05	32	56.48	0.7	58.41
KY	68	25.79	5,728	9.35	11.79	462	21.44	6.3	17.64
TN	53	78.33	3,059	ND	ND	148	ND	2.4	ND
TX	87	41.18	2,439	173.27	188.49	98	70.05	1.6	52.39
IL	39	ND	1,826	ND	ND	87	ND	0.9	ND
MO	22	45.00	643	22.08	25.58	55	8.26	0.6	ND
USA	1,197	40.29	18,704	9.65	11.28	1,457	24.51	21.9	21.76

Source: Economic Census (2024)

[1] NAICS codes in parentheses. National estimates exclude NY. Top 5 states by 2022 sales. %G = annualized growth rate, 2012-2022. For sales, %G_N = nominal growth rate, %G_R = real growth rate (constant dollars), deflated by the U.S. Producer Price Index (PPI) for the relevant NAICS code. ND = value not available due to non-disclosure.

Turning to Dairy, NY appears the most competitive. It ranked third in sales volume in 2012 and maintained this position through 2022, albeit still largely behind CA and WI. In terms of establishments, NY had the strongest growth among top states with an increase of 16.44%. Sales, payroll and employment growth in NY are favorable to most top states but for Idaho who had the highest growth over all metrics.

Animal Slaughter & Meat processing in NY is small relative to the top states. Composed primarily of smaller processers, growth patterns are considerably below (and often negative) the top producing states and national averages. Processor concentration issues are prevalent in this industry and suggest growing concern for NY where the average livestock farm is also much lower than in these other states

For the Brewery sector, NY recorded the strongest growth among the top five states in both revenue and employment (Table 3). Growth in employment and establishments are relatively strong for all states considered, and for the U.S. in total, but where changes in sales are highly variable. The results suggest the nature of Brewery expansion is likely affected by firm scale (e.g., micro-breweries vs large-scale breweries). Indeed, NY had the highest growth rates in sales across all states evaluated (3.31%).

In contrast, NY Wineries showed relatively weaker performance, particularly in sales and employment. However, growth in number of establishments and payroll was more moderate, and NY still ranked the 4th largest state by revenue in the sector. California continued to dominate the sector by scale.

For Distilleries, nondisclosure issues prevent complete analysis, but available data suggest NY's growth was reasonably strong and, in particular, for employment and, by association, payroll. Of note, growth in small-scale distilleries in NY significantly contributes to this result, relative to the more common large-scale distilleries in KY and TN. This is due, in part, to more recent farm distillery license classifications in the state, similar to earlier legislation for farm wineries and farm breweries.

Industry Profitability

We now consider industry profitability in 2022 across food and beverage manufacturing sectors in NY compared with national estimates. In doing so, we examine revenue shares by cost component: annual payroll, capital expenditures, and cost of materials. A residual term serves as a proxy for industry profits (i.e., revenue less costs). The results for the food manufacturing and beverage manufacturing sectors, are shown in Table 4A and Table 4B, respectively.

Overall, NY food manufacturing sectors demonstrate 1.68 percentage points higher industry profitability relative to the national average (Table 4A), whereas the aggregate beverage sector has a 11.72 percentage point reduction in profitability (Table 4B), primarily driven by the nonalcoholic beverage sector. Of course, aggregate profitability indicators are a function the composition and relative sizes of subsectors within them, so a more informed assessment proceeds with the individual subsectors.

Interestingly, profitability shares in Grain & Oilseed Milling and Sugar & Confectionery manufacturing are much higher than the national average averages (34.47% versus 19.28% and 34.76% versus 27.98%, respectively) (Table 4A). In both sectors, this elevated profitability is attributed primarily to a lower share of cost of materials. In contrast, profitability in Animal Slaughter & Meat processing is 4.63 percentage points below the national average and attributed primarily to the higher share material costs (including livestock costs). This is consistent with its relatively weaker performance discussed above. The other food manufacturing sectors' profitability are relatively comparable with national averages.

Table 4A: Food manufacturing profitability analysis, New York and United States, 2022.[1]

Sector & Area	Sales ($ Million)	Payroll ($ Million)	CAPEX ($ Million)	Materials ($ Million)	Total Cost ($ Million)	Profit Proxy ($ Million)
Food (311)						
NY	25,254	2,696	43	15,311	18,439	6,815
	(100.00)	(10.68)	(1.71)	(60.63)	(73.01)	(26.99)
USA	1,013,907	85,844	20,381	650,367	756,593	257,314
	(100.00)	(8.47)	(2.01)	(64.14)	(74.62)	(25.38)
Animal Food (3111)						
NY	2,012	120	51	1,319	1,489	522
	(100.00)	(5.97)	(2.52)	(65.54)	(74.03)	(25.97)
USA	72,719	3,850	1,469	49,480	54,799	17,920
	(100.00)	(5.29)	(2.02)	(68.04)	(75.36)	(24.64)
Grain and Oilseed (3112)						
NY	1,886	102	20	1,114	1,236	650
	(100.00)	(5.41)	(1.07)	(59.05)	(65.53)	(34.47)
USA	128,546	3,995	2,292	97,470	103,757	24,789
	(100.00)	(3.11)	(1.78)	(75.83)	(80.72)	(19.28)
Sugar & Confectionary (3113)						
NY	1,286	182	21	636	839	447
	(100.00)	(14.14)	(1.63)	(49.47)	(65.24)	(34.76)
USA	40,842	4,698	1,189	23,529	29,416	11,426
	(100.00)	(11.50)	(2.91)	(57.61)	(72.02)	(27.98)
Fruit, Vegetable, Specialty (3114)						
NY	2,273	316	34	1,156	1,505	768
	(100.00)	(13.88)	(1.48)	(50.85)	(66.21)	(33.79)
USA	87,443	8,997	2,020	47,881	58,897	28,545
	(100.00)	(10.29)	(2.31)	(54.76)	(67.36)	(32.64)
Dairy (3115)						
NY	8,725	628	167	6,316	7,111	1,614
	(100.00)	(7.20)	(1.91)	(72.39)	(81.50)	(18.50)
USA	148,520	9,606	2,791	106,851	119,247	29,273
	(100.00)	(6.47)	(1.88)	(71.94)	(80.29)	(19.71)
Animal Slaughter & Meat (3116)						
NY	1,693	155	19	1,244	1,418	275
	(100.00)	(9.14)	(1.12)	(73.51)	(83.77)	(16.23)
USA	301,954	27,027	4,954	206,983	238,964	62,990
	(100.00)	(8.95)	(1.64)	(68.55)	(79.14)	(20.86)
Fish & Seafood (3117)						
NY	157	28	1	95	124	33
	(100.00)	(17.78)	(0.61)	(60.74)	(79.13)	(20.87)
USA	14,472	1,591	322	9,830	11,743	2,730
	(100.00)	(10.99)	(2.23)	(67.92)	(81.14)	(18.86)
Bakery & Tortilla (3118)						
NY	3,746	774	66	1,593	2,433	1,313
	(100.00)	(20.67)	(1.75)	(42.52)	(64.94)	(35.06)
USA	80,309	12,609	1,983	36,581	51,174	29,136
	(100.00)	(15.70)	(2.47)	(45.55)	(63.72)	(36.28)
Other Food (3119)						
NY	3,412	384	45	1,728	2,156	1,256
	(100.00)	(11.25)	(1.31)	(50.64)	(63.20)	(36.80)
USA	139,165	13,450	3,371	71,872	88,723	50,442
	(100.00)	(9.69)	(2.42)	(51.65)	(63.75)	(36.25)

Source: Economic Census (2024)

[1] NAICS codes in parentheses. National estimates exclude NY. CAPEX = Capital expenditures, Total Cost = Payroll + CAPEX + Materials. Profit Proxy = Sales – Total Cost. Percentage of sales for each component in parentheses.

Table 4B: Beverage manufacturing profitability analysis, New York and United States, 2022.[1]

Sector & Area	Sales ($ Million)	Payroll ($ Million)	CAPEX ($ Million)	Materials ($ Million)	Total Cost ($ Million)	Profit Proxy ($ Million)
Beverage (3121)						
NY	3,725	578	215	1,961	2,754	971
	(100.00)	(15.51)	(5.77)	(52.65)	(73.93)	(26.07)
USA	120,367	13,810	3,760	57,316	74,886	45,481
	(100.00)	(11.47)	(3.12)	(47.62)	(62.21)	(37.79)
Non-alcoholic Beverage (31211)						
NY	1,558	218	74	1,079	1,370	188
	(100.00)	(13.98)	(4.73)	(69.24)	(87.95)	(12.05)
USA	49,989	4,813	1,322	32,373	38,508	11,481
	(100.00)	(9.63)	(2.64)	(64.76)	(77.03)	(22.97)
Brewery (31212)						
NY	1,497	217	28	509	754	743
	(100.00)	(14.48)	(1.88)	(34.01)	(50.37)	(49.63)
USA	27,911	3,934	1,065	9,749	14,748	13,163
	(100.00)	(14.10)	(3.81)	(34.93)	(52.84)	(47.16)
Winery (31213)						
NY	541	111	23	248	381	160
	(100.00)	(20.50)	(4.23)	(45.77)	(70.50)	(29.50)
USA	23,763	3,606	972	10,124	14,702	9,061
	(100.00)	(15.17)	(4.09)	(42.60)	(61.87)	(38.13)
Distillery (31214)						
NY	129	33	3	17	53	76
	(100.00)	(25.01)	(2.61)	(13.51)	(41.13)	(58.87)
USA	18,704	1,457	488	5,179	7,124	11,580
	(100.00)	(7.79)	(2.61)	(27.69)	(38.09)	(61.91)

Source: Economic Census (2024)

[1] Industry NAICS codes in parentheses. National estimates exclude NY. CAPEX = Capital expenditures, Total Cost = Payroll + CAPEX + Materials. Profit Proxy = Sales – Total Cos. Percentage of sales for each component in parentheses.

Profitability shares are weaker in beverage manufacturing than in food manufacturing when measured against national averages (Table 4B). In fact, Breweries are the only beverage sector with a profitability share exceeding the national average. As noted earlier, Nonalcoholic beverage manufacturing appears to be the principal driver, with a profitability share more than ten percentage points below the national average. Following nonalcoholic beverage's profitability performance is wineries, which is 8.63 percentage points below the national average. In both sectors, payroll and cost of materials account for a larger share of total costs.

Overall, profitability patterns in NY suggest that manufacturing sectors are more labor-cost-intensive and capital-investment-light relative to national averages. Payroll and payroll per employee account for higher shares of costs in every sector, consistent with industry concerns regarding higher labor costs in the state. At the same time, capital expenditure shares fall below national averages across nearly all sectors, although Animal Foods and Dairy manufacturing are important exceptions. Consistent investment in capital infrastructure (expansion and reinvestment in depreciated capital) is important for long term resiliency.

Nonemployer Performance

The previous results represent establishments with paid employees (2,701 establishments in NY); however, there exist another 4,251 establishments without paid employees (Nonemployer Statistics, 2024). In Table 5, we examine the trends and differences in growth rates between nonemployer and employer establishments across sectors.

Notably, the growth rate in the number of nonemployer establishments (3.08%) in the aggregate food manufacturing sector far outpaces that of employers (0.12%). This is not in and of itself surprising as nonemployers may convert to employers overtime and more prevalently represent new start-up firms. If that is the case, it is not surprising that growth rates in sales are higher for nonemployers (4.90%) than perhaps longer established employer firms (3.42%). That said, added opportunities may exist for small-scale nonemployer firms in particular industries. As shown in Table 5, only Sugar & Confectionery, Dairy, Fish & Seafood, and Bakery & Tortilla have higher sales growth rates for employer firms in NY. Smaller-scale opportunities may be especially prevalent in the beverage (and tobacco) sector where nonemployer growth (10.34%) far exceeded that for employers (1.60%) over the ten-year period.[6]

Considerable variation exists across industries when comparing NY to the rest of the country. This is likely due, in large part, to the nature of farm and food production in NY specifically relative to average national trends.

Firm Size Distribution

The comparison of employer and nonemployer trends highlight implications of scale as related to firm performance. Accordingly, we return to the employer-only data to assess changes in the distributions of firms by size (employment) over time. Table 6A examines employment growth rates of firms classified into six size categories. The smallest size is classified as 1-9 employees, whereas the largest size category is more than 500 employees. Notably, changes in establishment counts can represent new establishments in a particular category, exits of establishments from production, and movement of establishments across categories over time through contraction or expansion.

In food manufacturing, NY exhibits significantly higher growth in employment among larger establishments, with an annual growth rate of 18.83% for establishments with at least 500 employees. National trends also demonstrate that the largest establishments have grown the most, although the rate is considerably lower at (2.24%).

While national trends show employment growth in all size categories, firm entry and exit, and/or movement of firms among categories in NY demonstrate a more mixed pattern. Indeed, small (1-9), medium (50-99), and large (250-499) establishment categories showed negative growth rates. What exactly is happening cannot be discerned with this aggregate data; however, given that for each negative category the subsequent categories show growth (in both establishments and employment), this may suggest smaller firm expansion and movement to larger size categories.

Size distribution patterns for beverage manufacturing are distinctly different. Here, employment in both the largest and the smallest categories demonstrate growth, with only one mid-scale category showing contraction. Based on the changes in establishment counts, this is likely a result of firm expansion. Furthermore, other than the one negative category, all other category growth rates are above the national estimates.

[6] Nonemployer statistics for beverage-only establishments are not available. Hence, our inclusion of beverage and tobacco (NAICS code 312).

Table 5: Non-employer food manufacturing activity and annual growth rates by sector, New York and United States, 2012 – 2022.[1]

	Establishments (Number)				Sales ($ Million)			
Sector & Area	**NonEmp 2022**	**NonEmp %G**	**Emp %G**	**Higher %G**	**NonEmp 2022**	**NonEmp %G**	**Emp %G**	**Higher %G**
Food (NAICS)								
NY	3,874	3.08	0.12	NonEmp	165	4.90	3.42	NonEmp
USA	60,936	5.41	1.75	NonEmp	2,523	8.26	4.08	NonEmp
Animal Food (3111)								
NY	119	4.88	5.26	Emp	5	3.94	2.02	NonEmp
USA	2,558	7.14	1.25	NonEmp	155	10.11	2.93	NonEmp
Grain and Oilseed (3112)								
NY	14	5.56	3.33	NonEmp	2	35.52	0.45	NonEmp
USA	561	4.88	2.12	NonEmp	32	1.94	2.90	Emp
Sugar & Confectionary (3113)								
NY	190	0.05	-0.86	NonEmp	7	-0.31	4.02	Emp
USA	2,951	1.57	0.70	NonEmp	98	4.54	2.70	NonEmp
Fruit, Vegetable, Specialty (3114)								
NY	291	0.74	2.68	Emp	13	9.65	0.69	NonEmp
USA	4,166	1.94	2.01	Emp	178	5.50	2.90	NonEmp
Dairy (3115)								
NY	124	-1.01	0.92	Emp	8	1.10	4.80	Emp
USA	1,271	0.99	0.60	NonEmp	77	5.33	4.63	NonEmp
Animal Slaughter & Meat (3116)								
NY	112	0.87	0.15	NonEmp	6	4.14	1.91	NonEmp
USA	2,813	0.48	0.78	Emp	165	6.78	5.24	NonEmp
Fish & Seafood (3117)								
NY	202	5.19	-5.29	NonEmp	10	1.70	2.08	Emp
USA	2,464	5.09	-1.60	NonEmp	235	12.01	3.62	NonEmp
Bakery & Tortilla (3118)								
NY	1,671	4.29	-0.67	NonEmp	57	3.39	4.61	Emp
USA	27,682	7.77	1.62	NonEmp	800	7.67	2.94	NonEmp
Other Food (3119)								
NY	1,151	3.23	3.16	NonEmp	59	8.58	3.50	NonEmp
USA	16,470	5.57	5.12	NonEmp	783	10.21	5.13	NonEmp
Beverage & Tobacco (312)								
NY	377	7.29	15.86	Emp	33	10.34	1.60	NonEmp
USA	6,166	4.43	12.34	Emp	526	6.20	2.31	NonEmp

Source: Economic Census (2024), Nonemployer Statistics (2024)

[1] Industry NAICS codes in parentheses. National estimates exclude NY. NonEmp = non-employer firms, Emp = employer firms. %G = annualized growth rate (nominal for sales), 2012-2022.

Table 6A: Distribution of food and beverage manufacturing establishments by employee size, aggregate sectors, New York and United States.[1]

Size Category	Employee Range	Estab. (Number)	Employees (Number)	Estab. (Number)	Employees (Number)	Employee Annual %G
NY Food (311)		**Year = 2012**		**Year = 2022**		
1	1-9	1,282	4,506	1,307	4,376	-0.29
2	10-49	529	11,429	544	11,921	0.43
3	50-99	93	6,355	89	6,271	-0.13
4	100-249	73	12,034	88	14,589	2.12
5	250-499	31	10,792	28	10,152	-0.59
6	500+	3	1,787	8	5,152	18.83
USA Food (311)		**Year = 2012**		**Year = 2022**		
1	1-9	13,203	47,115	16,049	55,071	1.69
2	10-49	7,710	167,591	8,900	192,948	1.51
3	50-99	1,833	130,077	2,008	141,550	0.88
4	100-249	1,747	277,664	1,959	309,807	1.16
5	250-499	786	277,313	931	323,402	1.66
6	500+	519	514,477	656	629,600	2.24
NY Beverage (3121)		**Year = 2017**		**Year = 2022**		
1	1-9	336	967	446	1,604	13.17
2	10-49	132	2,586	203	4,237	12.77
3	50-99	16	1,039	21	1,443	7.78
4	100-249	10	1,691	7	1,117	-6.79
5	250-499	3	959	5	1,567	12.68
6	500+	1	647	2	1,285	19.72
USA Beverage (3121)		**Year = 2017**		**Year = 2022**		
1	1-9	5,589	18,805	7,042	26,683	8.38
2	10-49	2,647	53,936	4,231	84,549	11.35
3	50-99	369	25,733	487	32,876	5.55
4	100-249	296	46,032	331	52,005	2.60
5	250-499	94	31,896	104	36,253	2.73
6	500+	41	30,315	45	36,371	4.00

Source: County Business Patterns (2024)

[1] Industry NAICS codes in parentheses. National estimates exclude NY. Employee Annual %G = annualized growth rate. Base year selected (2012 or 2017) based on propensity of nondisclosures.

Nondisclosure issues for firm size were prevalent for sub-industry sectors. Accordingly, results are not available for some industries and others require category adjustments. The results are shown in Table 6B. For ease of exposition, we leave a detailed review with the interested reader. In general, changes in employment by firm size vary considerably across sectors.

Table 6B: Distribution of food manufacturing establishments by employee size, selected disaggregate sectors, New York.[1]

Size Category	Employee Range	Estab. (Number)	Employees (Number)	Estab. (Number)	Employees (Number)	Employee Annual %G
Animal Food (3111)		**Year = 2017**		**Year = 2022**		
1	1-9	17	79	26	98	4.81
2	10-49	23	460	21	471	0.48
3	50-99	3	206	3	169	-3.5
4	100+	2	522	4	807	10.92
Sugar & Confectionary (3113)		**Year = 2012**		**Year = 2022**		
1	1-9	92	309	67	236	-2.36
2	10-49	41	846	41	925	0.93
3	50-99	5	378	7	484	2.80
4	100-249	5	768	9	1,271	6.55
5	250+	1	304	1	499	6.41
Fruit, Vege, Spec. (3114)		**Year = 2012**		**Year = 2022**		
1	1-9	31	112	54	157	4.02
2	10-49	26	676	25	511	-2.44
3	50-99	8	524	6	420	-1.98
4	100-249	9	1,543	12	2,195	4.23
5	250-499	4	1,555	6	2,139	3.76
6	500+	0	0	1	544	UD
Dairy (3115)		**Year = 2012**		**Year = 2022**		
1	1-9	47	129	45	107	-1.71
2	10-49	26	633	33	796	2.58
3	50-99	9	730	4	337	-5.38
4	100-249	16	2,881	22	3,715	2.89
5	250-499	10	3,542	8	3,059	-1.36
6	500+	1	617	4	2,796	35.32
Slaughter & Meat (3116)		**Year = 2012**		**Year = 2022**		
1	1-9	69	237	79	302	2.74
2	10-49	47	1,038	45	1,063	0.24
3	50-99	14	928	11	744	-1.98
4	100+	6	1,616	4	984	-3.93
Bakery & Tortilla (3118)		**Year = 2012**		**Year = 2022**		
1	1-9	97	3,218	859	2,855	-1.13
2	10-49	289	6,028	301	6,409	0.63
3	50-99	35	2,343	39	2,661	1.36
4	100-249	26	4,088	26	4,304	0.53
5	250-499	5	1,700	5	1,830	0.76
6	500+	1	673	1	592	-1.20
Other Food (3119)		**Year = 2012**		**Year = 2022**		
1	1-9	114	395	162	573	4.51
2	10-49	67	1,593	68	1,531	-0.39
3	50-99	14	936	15	1,147	2.25
4	100-249	8	1,086	11	1,789	6.47
5	250-499	8	2,721	3	1,112	-5.91
6	500+	0	0	2	1,220	UD

Source: County Business Patterns (2024)

[1] Industry NAICS codes in parentheses. Employee Annual %G = annualized growth rate. Base year (2012 or 2017), size categories, and industries selected based on propensity of nondisclosures. UD = undefined

Conclusions

The industry-level analysis shows that food and beverage manufacturing in aggregate grew modestly over the last decade, with rising firm and employment counts outpacing real revenue growth. On profitability, our proxy placed food manufacturing 1.6 percentage points above the national margin, driven by lower material costs—but the same cost structure flagged higher labor costs and low capital expenditure. Nonemployers outpaced employers in both establishment and revenue growth, signaling a higher shift in small business growth. However, by employment measures, the largest establishments grew the most while the smallest declined. That divergence, together with shrinking establishment counts in the mid-sized brackets, suggests that mid-sized firms consolidated upward into larger ones even as new micro-establishments formed at the very bottom.

Putting it all together, a few patterns emerge across sectors. The first pattern is a volume-up, value-down dynamic: firm and employment counts are rising, but revenue growth is less than comparable. Fruits & Vegetables is the clearest case—employers led the top-five states in establishment growth even as real revenue fell 1.59% and the sector's national rank slipped. The same gap between firm formation and real output also occurs in Animal Food (strong establishment growth, less than comparable revenue growth), and across the food sectors more broadly.

The second pattern is consolidating middle-sized establishments. The smallest establishments and nonemployers grew strongly while the mid-tier declined, leaving growth concentrated at the very bottom and the top with contraction in between. Bakery & Tortilla—the state's largest food manufacturing sector by employment—shows this most plainly: employer establishments declined while nonemployers grew, and small establishments contracted as mid-tier firms expanded, so revenue gains came through consolidation rather than a broadening base of producers. Sugar & Confectionery manufacturing reveals a similar story: its smallest firms shrinking in count and employment while the next size category grew.

The third pattern is the divergence between where margins are healthy and whether employment and output growth follow. The breakout performers on profitability and firm formation are smaller scale establishments: distilleries post the highest margin of any sector (nearly 60%) and exhibit strong establishment growth yet rank second smallest by employment; breweries grew fastest of all by establishment count (69.74%) on similarly strong margins, but off a small base. The sectors that carry the labor market and the output—dairy (the state's strongest and most nationally competitive sector, but a thin margin and material-heavy cost structure), bakery, and animal slaughter & meat (below-national margins, negative employment and real revenue growth)—grow more slowly or run thin.

Finally, the pairing of healthy margins with low capital expenditure points to underinvestment. Taken together, these patterns caution against policies that simply raise firm counts. With real output relatively flat despite rising firm and worker numbers, the more pressing need is to help existing producers scale through the missing middle and move into higher value added activity.

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Appendix A
Data Processing Details

PPI

The PPI is based on 2012 values. To express 2022 revenues in 2012 dollars, nominal revenues are deflated by dividing them by the relevant 2012-based PPI for each category. For the growth rate calculation, we retain the 2012 revenue data and adjust the 2022 revenue to 2012 dollars using the relevant PPI deflator.

Disclosure Issues

The data processing focused on addressing disclosure suppression in the Economic Census and recovering missing values using supplementary datasets and internal estimation strategies. When values were suppressed due to confidentiality restrictions, additional sources such as County Business Patterns (CBP) and IMPLAN were used to supplement the missing information. In cases where external sources could not fully resolve the suppression, ratios and relationships within the Economic Census tables were used to estimate the underlying values.

For employer establishments, U.S. Census data served as the primary data source. However, in cases where disclosure restrictions suppressed certain values, additional datasets were used to fill in missing information. Disclosure issues were more common in industries with a smaller presence in New York State, such as grain and oilseed milling (NAICS 3112), seafood product preparation and packaging (NAICS 3117), and certain beverage manufacturing subsectors. For establishments with no paid employees, Nonemployer Statistics dataset from the U.S Census was utilized and no disclosure issues were found.

For the year 2022, employment figures were obtained directly from County Business Patterns when Census data were unavailable. Annual payroll and sales values were estimated using growth rates from IMPLAN. Specifically, the reported IMPLAN growth rate was applied to the most recent available Census benchmark year (either 2012 or 2017, with 2017 prioritized when both were available) in order to estimate the corresponding 2022 values. For the 2012 benchmark year, disclosure restrictions affected several subsectors. For example, seafood processing had suppressed sales values, while sugar and confectionery manufacturing also exhibited disclosure issues. In these cases, values were estimated using IMPLAN growth rates following the same procedure described above. Similar disclosure issues were observed for winery and distillery establishments.

For the Northeast regional analysis (Table 2), additional data sources were again required to address disclosure issues in Census data. For beverage manufacturing in Connecticut and Massachusetts, County Business Patterns data were used to obtain annual payroll and employment figures. For Pennsylvania, sales values were estimated using the three-digit NAICS category 312 (beverage and tobacco manufacturing). To isolate beverage manufacturing, the ratio of NAICS 3121 (beverage manufacturing) sales to total NAICS 312 sales in 2017 was calculated. This ratio was then applied to the reported NAICS 312 sales value to estimate beverage manufacturing sales. Growth rates from IMPLAN were subsequently used to project the value for 2022.

For the analysis of the top five states in the industries of interest (Table 3), 2017 data were used when 2012 data were unavailable. Because the analysis focuses on average annual growth over a ten-year period, the growth calculation was adjusted accordingly. When 2017 served as the baseline year, the observed change was divided by five years instead of ten to obtain the average annual growth rate.

For the profitability analysis (Table 4), capital expenditure data were unavailable for several subsectors in 2022 due to disclosure restrictions. Industries affected included sugar and confectionery manufacturing,

distilleries, and animal slaughtering and processing. To address this limitation, historical capital-expenditure-to-output ratios were calculated using earlier years for which data were available. These ratios were then applied to 2022 output values to estimate capital expenditures for the missing observations.

For the analysis of employee size distributions (Table 6), total employment counts were often available even when employment by size category (1–9, 10–49, 50–99, 100–249, 250–499, and 500+) was partially suppressed. In these cases, missing category values were derived by subtracting the disclosed categories from the total reported employment counts.

OTHER A.E.M. EXTENSION BULLETINS

EB No	Title	Fee (if applicable)	Author(s)
2026-15	Trend Analysis of New York State Food and Beverage Manufacturing Industries: Growth, Profitability, and Competitive Positioning		Celenk, M. and Schmit, T.M.
2026-14	Progress of the Dairy Farm Report, Selected Financial and Production Factors, Dairy Farm Business Summary, 118 New York Farms, 2025		Karszes, J. and Koval, H.L.
2026-13	2026 Northeast Farmland Market Report - A Transaction-Based Analysis		Hinds, A.,Thilmany, E., Zhang, W., and Shew, A.
2026-12	20260US Northeast Land Value Trends; An ASFMRA and CCE Joint Publication		Zhang, W., Rideout, B., Guay, R.,Guyer, N., Kuhn, D., Lagerquist, J., Loomis, C., McDowell, K., Pattison, S., Stone, R., Sweeney, S., Windecker, K., and Groom, C.
2026-11	Farm Performance at Farmers Markets: 2025 Summary		LeRoux, M., Rigotti, L., and Schmit, T.
2026-10	Cost of Establishment and Production of Cold Hardy Grapes in the Chautauqua Region of New York - 2025		Pinto, A. F., Gomez, M. I., Moss, R., Bekelja, K. M., and Walter-Peterson, W.
2026-09	2025 New York Berry Price Information		Park, K.
2026-08	2025 Farm Product Price Reports: Farmers Markets & Grocery Stores in NY		Santilana, S., Rigotta, L., and LeRoux, M.
2026-07	Trends in Local and Regional Food Systems in New York State		Jablonski, B.B.R., and Bauman, A.
2026-06	The Cost of Raising Grass-Fed Beef in th Northeast United States		Waro, M., Gomez, M.I., and Park, K.
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