



2016-2021 STRATEGIC PLAN

ORCHARD PARK ECONOMIC DEVELOPMENT COMMITTEE

PREPARED BY:

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OCTOBER 2016

2016-2021 STRATEGIC PLAN

ORCHARD PARK ECONOMIC DEVELOPMENT COMMITTEE

ACKNOWLEDGMENTS

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EXECUTIVE SUMMARY

STUDY PURPOSE AND BACKGROUND

The Orchard Park Economic Development Committee (OPEDC) is a volunteer committee that promotes economic development in the Town and Village of Orchard Park, New York. The group commissioned the Orchard Park Economic Development Committee Strategic Plan to:

- Reassess and update the Committee's mission and goals;
- Reassess the demographic, economic, land use, and zoning conditions in the Town as they relate to economic development;
- Provide a realistic and achievable action plan that will guide the Committee's activities for the next 5-year period;
- Build community consensus by reaching out to Town and Village officials, the business community, other stakeholders, and the public.

This Strategic Plan presents policies and actions that seek to improve the economic well-being and quality of life of Orchard Park by creating and retaining quality jobs, facilitating growth in economic activity, and providing a stable and growing tax base. The Plan encourages investment and promotes a healthy and growing economy in Orchard Park.

An advisory committee with no powers to approve legislation, budget or disburse funds, or hire staff, the OPEDC advises municipal boards. By pursuing the Plan's economic development agenda, the OPEDC will achieve its mission: "To promote Orchard Park as a great place to do business".

This Plan updates the 2008 Strategic Plan prepared by the Urban Design Project at the University at Buffalo. Since the previous plan was completed, there have been notable shifts in the local and regional economies.

COMMUNITY PROFILE

POPULATION

The Town of Orchard Park is located 18 miles south of the City of Buffalo in the center of Erie County and is the hub of the County's "Southtowns" region. The Town's population of 29,945 in 2014 was 5.3 percent higher than at the time of the 2010 Census (see Table S-1). Compared to the region and the State, the Town's population is well educated and

Village	Town
Population Estimate (2014)	
3,219	29,545
Median Household Income	
\$ 78,466	\$ 81,326
Persons with Incomes Below Poverty Level	
4.1 %	2.4 %
Educational Attainment (% High School Graduate or Higher)	
99.4 %	96.3%
Median Housing Value	
\$ 218,200	\$193,300
Total Housing Units (2010)	
1,459	12,086
Source: U.S. Census Bureau	

affluent. More than half of the Town's labor force is employed in management and related occupations

ECONOMY

There were 692 business establishments located in the Town of Orchard Park in 2012, up 4.5 percent from 662 firms in 2002. Orchard Park provided the region with 10,209 jobs in 2012, up 23 percent since 2002. The health care and social assistance sector added 1,152 jobs between 2002 and 2012 (a whopping 80 percent increase), becoming the biggest source of employment in the Town. With 2,596 jobs in 2012, manufacturing added 482 jobs, a 23 percent increase. Retail employment rose by 24 percent, ending with 2,318 jobs in 2012, up 450 jobs from 1,868 jobs in 2002. State-defined industry clusters best represented in the Town include biomedical, advanced manufacturing, and industrial machinery.

LAND USE AND ZONING

The Town of Orchard Park covers 38.44 square miles or about 24,602 acres of land. Residential uses predominate in most of the Town. The northeast sector, its commercial hub, is the location of large-scale commercial and industrial uses. The Town's Industrial (I1) zoning district covers about 1,146 acres centered along US 219 in the northeast portion of the Town. The Industrial zoning district covers approximately 4.7 percent of the Town's land area. Much of the Town's limited industrially zoned land is occupied by other land uses.

CB Richard Ellis reports that 2014 was the third consecutive year that demand for industrial space in the Buffalo-Niagara region outpaced supply, resulting in a lower overall availability rate. This trend is expected to continue. The 2014 rates mark the 10th consecutive year that the Buffalo Industrial Market availability rate (4.5 percent) has remained below the national average (10.6 percent).

COMMUNITY PARTICIPATION

A number of processes and procedures facilitated the participation of local businesses and other stakeholders in the preparation of the Orchard Park Strategic Plan for Economic Development. These include a series of duly noticed OPEDC work sessions open to the public, a stakeholder meeting, and a Business Retention and Expansion (BRE) survey.

ACTION PLAN

The Action Plan establishes a pro-active business environment with two basic objectives:

- Retaining existing businesses. The first steps in developing a program to retain existing businesses are to know who they are and to understand the issues they face. This study includes an updated business inventory as well as a survey of existing businesses. The Action Plan addresses issues identified in the survey results and other study findings. Of special concern are strategies to strengthen at-risk businesses currently located in the Town which may otherwise close or relocate outside of the area; and
- Attracting new companies with expansion or relocation plans. Target industries should include those that complement the Town's existing business environment and that support the establishment and growth of business clusters with prospects for growth.

POLICY 1: PROMOTE A BALANCED AND RESILIENT ECONOMIC BASE

With a mix of health care, manufacturing, and service sector establishments, Orchard Park already has a robust mix of businesses. This policy seeks to attract add arts-related activities to the mix.

PURSUE THE ARTS AS AN ECONOMIC DRIVER

Promote the establishment and development of arts-based businesses and activities. An important ingredient of vibrant local economies, the arts bring people together, spark community pride, and create vibrant places that attract young people. Promoting the arts is a component of an overall effort to promote tourism in Orchard Park.

POLICY 2: MARKET THE COMMUNITY

PROMOTE ORCHARD PARK

- Continue to update the inventory of available privately held sites.
- Distribute an email newsletter and press releases highlighting economic development successes in Orchard Park and profiling specific development opportunities.
- Co-host joint Town/Village/Chamber of Commerce events to highlight specific assets.
- Participate in joint marketing efforts with other economic development organizations
- Create a new joint town/village economic development website.

IMPROVE ORCHARD PARK'S DRAW AS A TOURISM DESTINATION

Tourism is the second largest industry sector in Western New York based on the number of jobs it provides. It is important that Orchard Park maintain and increase its share of the growing economic activity generated by tourism in the region. There is a potential need in Orchard Park for tourist infrastructure such as hotels, inns, bed and breakfasts, and small- to medium sized conference facilities. These facilities would support the tourism industry and local businesses.



Zoning Analysis. Be proactive in encouraging and supporting proposed development projects that contain lodging and conference facilities by ensuring that the Town and Village zoning laws include the specific types of uses desired in the community and that the districts in which they are allowed are mapped in the preferred locations.

Market and Feasibility Studies. Encourage investment by identifying opportunities such as:

- Conduct a market study for hotel and conference facilities.
- Evaluate the potential for and the feasibility of a theater in the village center.
- Evaluate the potential for a National Football League (NFL) Buffalo Bills museum.

POLICY 3: OPTIMIZE THE USE OF REAL ESTATE ASSETS

The purpose of this policy is to encourage the development of sites and buildings needed to accommodate new investment and employment opportunities. The lack of available sites and buildings for business expansion and recruitment and growing businesses continues to be a major economic development challenge for Orchard Park. Recommendations include:

EVALUATE OPTIONS FOR MAXIMIZING INDUSTRIAL DEVELOPMENT POTENTIAL IN EXISTING INDUSTRIAL ZONES

Orchard Park's economic development capacity is limited by a shortage of industrially zoned land as well as by the use of industrially zoned parcels for other land uses. Evaluate options for increasing industrial development potential on current industrially zoned (I1 and DR) lands. These options could include providing incentives to encourage industrial versus other types of development. One example of this would be to allow greater building height and/or maximum building coverage for industrial uses than for other uses (e.g., retail). It is important that any such revisions to maximize development potential include adequate performance, site layout and design, and landscaping standards to ensure quality development that is compatible with adjoining land use patterns.

DESIGNATE APPROPRIATE LOCATIONS FOR MIXED-USE DEVELOPMENT

Support mixed-use development projects in appropriate locations to encourage a walkable community, a mix of housing types, and new residents who support local businesses. This type of development could be appropriate in locations in the Village Center, North or South Buffalo Streets, and other locations in the Town

REZONE THE NFL STADIUM SITE

Currently the home of the National Football League's (NFL's) Buffalo Bills, the long-term future of New Era Field is uncertain. The Town of Orchard Park should take a proactive approach regarding the potential redevelopment of the 300+-acre site.

Although it is the largest commercial development in the town, most of the New Era Field complex is zoned residential. The town should evaluate other reuse options in the event that the Bills relocate and all or part of the site is redeveloped.

One option would be to permit a mix of compatible uses including corporate-style commercial office and high performance, clean and enclosed light industrial, assembly, and research and

development uses (similar to those existing in other locations in the Town). Such development would address the shortage of industrial and commercial office sites, would promote new



business activity and new quality jobs, and would significantly add to the town's commercial tax base.

Other potential uses include:

- indoor and outdoor recreational facilities;
- hotels and conference facilities;
- small-scale, ancillary convenience retail and services to serve the development itself; and
- mixed-use developments.

CONTINUE TO REQUIRE HIGH QUALITY DESIGN

Maintain the existing practice of the Town and Village boards to require high quality design in all commercial and industrial developments. Quality design helps to maintain and enhance property values, spurs additional investment in the area, and creates a more visually attractive community, one aspect of a community with a high quality of life.

PREPARE A CORRIDOR MANAGEMENT PLAN FOR SOUTHWESTERN BOULEVARD

The combination of increased traffic volumes due to population and retail development growth, high speeds, numerous intersecting driveways and local roads resulting in nearly constant turning movements and "conflict points" combine to create unsafe conditions on Southwestern Boulevard .



Potential modifications to this corridor include streetscape improvements; changes to existing stop light spacing and timing; new

traffic signals; changes to speed limits based on surrounding land use patterns, sightlines, traffic volumes, and road geometry; and other alterations that could improve the safety and flow of traffic.

INCREASE HOUSING DIVERSITY

Amend the zoning to allow a broad spectrum of housing types to provide the housing types needed to attract millennials and retain empty nesters. These groups are generally less car-dependent, prefer walkable communities, and would be expected to support local businesses. Millennials are also in the prime working group and would augment the town's labor force

POLICY 4. ENHANCE COMMUNITY CAPACITY

The following strategies will ensure that the proper leadership structure is in place, that strategic partnerships are established, and that resources are available to ensure Plan success.

LEADERSHIP

It is expected that the Town and Village Attorneys would work in coordination with the OPEDC to prepare the following key documents for Town and Village Board approval.

- An updated agreement (last approved in 2005) to be co-signed by the Town and Village Boards which re-affirms the OPEDC and its purpose, mission, and vision;
- OPEDC implementing legislation and by-laws, which establish its role (e.g., defining the circumstances in which the OPEDC shall serve in an advisory capacity to municipal boards), its composition, its procedures, etc.

PARTNERSHIPS

The implementation of certain recommendations in this plan may require the support of partners from both the public and private sectors. The need for cooperation and partnerships may extend to adjoining communities or to regional economic development organizations. Specific strategies include:

- Re-establish an Orchard Park Chamber of Commerce membership position on the OPEDC.
- Ensure that one OPEDC member is either a Village resident or an owner of a business located in the Village.
- Meet with the Erie County Industrial Development Agency (ECIDA) to identify and discuss mutual areas of concern or opportunity.
- Assign each OPEDC member one agency for which he or she will serve as the official liaison.

ORGANIZATIONAL CAPACITY

- Evaluate the potential outcomes of creating an Orchard Park Local Development Corporation (LDC). LDCs are private, not-for-profit corporations for the benefit of local governments for economic development or other public purposes.
- Recommend annual funding for the OPEDC from the Town and Village governments.
- Evaluate the potential for creating an Orchard Park Community Foundation, which could coordinate and pool donations for economic development initiatives. Another option would be to establish a Southtowns Community Foundation, which would have a broader base of support and a wider range of projects covering a larger area.
- Identify those actions that prospective entrepreneurs must take prior to opening or establishing a business in the Town of Orchard Park. Create a listing or matrix that identifies the necessary permits and other approvals that must be acquired and the forms that must be submitted.

POLICY 5. SUPPORT WORKFORCE DEVELOPMENT EFFORTS

The OPEDC should encourage and support:

PARTNERSHIPS

Strategic partnerships between the Town and the Village and other organizations to bridge the gap between the skill set of the local labor force and the skill set needed by local businesses. These partners include the Orchard Park Chamber of Commerce, the Orchard Park School

District, Erie County Community Collee (ECC), Bryant & Stratton, the University at Buffalo (e.g., UBMD), and the Small Business Administration.

INTERNSHIPS

Establishment of an internship program for high school students that gives students exposure to the Orchard Park business community and the types of jobs it offers.

SCHOLARSHIPS/TUITION REIMBURSEMENTS

Establishment of a scholarship/tuition reimbursement program that provides Town residents who work part-time for local employers while they attend school with the opportunity receive reduced tuition rates.

IMPLEMENTATION

Responsibility for implementing the Plan will rest with the Town and/or Village governments. Many strategies will also require coordination with other agencies, jurisdictions, and organizations. Certain recommended actions may take several years to implement fully. Other activities may require ongoing implementation on an annual or continuous basis.

1.0 INTRODUCTION AND ORGANIZATIONAL ASSESSMENT

1.1 INTRODUCTION

1.1.1 STUDY PURPOSE AND METHODOLOGY

The Orchard Park Economic Development Committee (OPEDC) is a volunteer committee that promotes economic development in the Town and Village of Orchard Park, New York. The OPEDC commissioned this Strategic Plan for Economic Development to accomplish the following:

- To reassess and update the Committee's mission and goals;
- To reassess the demographic, economic, land use, and zoning conditions in the Town as they relate to economic development;
- To provide a realistic and achievable action plan that will guide the Committee's activities for the next 5-year period;
- To reach out to Town and Village officials, the business community, other stakeholders, and the general public to ensure that the Committee's vision is shared by the broader community.

1.1.2 BACKGROUND

1.1.2.1 OPEDC 2008 STRATEGIC PLAN REVIEW

In 2008, the OPEDC oversaw the completion of its first Strategic Plan. The group intended to improve its effectiveness in promoting economic development by better defining its role, by identifying goals, and by developing specific strategies and actions steps. Evaluation of the initial (2008) Strategic Plan is a critical early step in the plan update process.

The 2008 Strategic Plan provided a detailed socioeconomic profile and a comprehensive analysis of Orchard Park and its economy. The plan provided the Town, for the first time, with a comprehensive inventory and assessment of the local economy and its relationship to the region. This baseline understanding of the economy is critical to developing a strategic plan for economic growth.

The Plan also provided recommendations to encourage sustainable and desirable economic growth. The formation of the Chestnut Ridge Conservancy (CRC) was one of the actions recommended in the 2008 Strategic Plan. The CRC, established in 2009, has been very successful in promoting the preservation, enhancement, and appropriate utilization of this Erie County park, one of the Town's greatest assets.

Strategic plans should be reviewed every five to seven years to ensure that they remain up to date and relevant. It has been eight years since the initial plan was prepared. The OPEDC has determined that it is now time to update and expand upon the 2008 Strategic Plan and prepare

a document that will guide the Committee's work for the next five years. Updates to the original plan incorporated into this document reflect major improvements in the health of the regional economy as well as changes in local conditions. In addition to updates for new market and community conditions, the plan identifies new and modified recommended courses of action.

1.1.2.2 GUIDING PRINCIPLES

The development of this Strategic Plan for the OPEDC is consistent with the committee's guiding principles, below:

1. Economic development should maintain and enhance the high quality of life enjoyed by Orchard Park residents, businesses and visitors.

The Town of Orchard Park enjoys a high quality of life within the Western New York region, with top ranked schools, abundant parks and recreational facilities, a healthy and historic village center, and low unemployment rates. Part of what will continue to attract businesses to Orchard Park is the opportunity to live and work within this desirable community. The Plan promotes economic growth based on the concept of a sustainable economy that complements the Town's high quality of life.

2. A healthy local economy based on a mix of maintaining existing businesses, expanding these businesses, and attracting new businesses.

The Strategic Plan, based on a three-pronged approach, involves:

- The retention of existing businesses and existing jobs in Orchard Park;
- The expansion of existing businesses already located in the Town; and
- The attraction of new businesses, investment, and jobs to Orchard Park.

3. Ensure adequate organizational capacity to implement the plan.



The OPEDC recognizes that the success of the economic development recommendations in this plan will depend on the organizational capacity available to implement the strategies. The OPEDC may also require additional financial resources to enable it to achieve the established goals and objectives within a reasonable timeframe.

The OPEDC cannot implement this plan on its own. To achieve the stated vision and goals, this Strategic Plan requires support and buy-in from Town and Village officials, the development community, the business community, and the residents of Orchard Park.

1.2 OPEDC ORGANIZATIONAL ASSESSMENT

OPEDC members identified the following questions regarding the Committee's ability to promote quality economic development:

- What can we do for the business community?
- What can we offer businesses in terms of municipal incentives?
- What incentives are available through the County and State?

1.2.1 MISSION AND VISION

This task identifies and evaluates these and other questions regarding the resources available to the Committee in the pursuit of achieving its mission, vision, and goals.

The Orchard Park Economic Development Committee (OPEDC) is committed to the high quality of life enjoyed by its citizens and businesses and understands the importance of a strong and diversified tax base.

As with any planning effort, the first step is to establish a strategic mission and enumerate specific goals and objectives. The Strategic Plan organizes these goals and objectives according to Town and Village priorities and the availability of required resources and organizational capacity. The



result is an actionable plan that identifies those elements that are valued and achievable within a reasonable timeframe (i.e., within one to five years).

The mission and vision of the OPEDC guide the group's efforts to promote quality economic activity. The Mission Statement defines the Committee's fundamental reason for existence and the scope of its efforts. These statements are by necessity broad and inclusive: they are the basic tenets under which the detailed objectives and action steps in the plan are organized.

An OPEDC work session conducted on August 18, 2015 kicked off the project. The group confirmed the purpose, tasks, and process of the study. Committee members provided input regarding the organizational assessment and the review of the 2008 Strategic Plan. The group also reconsidered and reaffirmed the OPEDC's Mission and Vision Statements, provided below.

OPEDC MISSION

To promote Orchard Park as a great place to do business.

OPEDC VISION

To be a driving force behind a sustained strong economy in the Town of Orchard Park, a key element of a vibrant community with a high quality of life.

1.2.2 LEGAL FRAMEWORK

AGREEMENT

Resolutions of the Town Board and Village Board and an Agreement signed in October 2005 by the Town Supervisor, the Village Mayor, and the OPEDC Chair created the OPEDC (see the Appendix). The Agreement described the Committee's responsibilities, established a budget to support its activities, and initiated an automatic annual renewal of the Agreement unless any of the three parties provides written notice otherwise.

Assessment. The annual funding for the OPEDC is no longer in place. In addition, the OPEDC does not engage in many of the activities specified in the Agreement. In addition, the Agreement does not specifically delegate responsibility for the preparation of this Strategic Plan to the Committee. Amendments to the Agreement are necessary to reflect current conditions.

BY-LAWS

A municipal committee such as the OPEDC derives its authority from the government body (e.g., the Town or Village Board) which created it. Through adoption of a local law, the government body may establish committee by-laws to specify the committee's roles and responsibilities and the range of activities delegated to it.

Assessment. The OPEDC does not have any bylaws. Such by-laws could help to clarify its purpose, role, and activities.

1.2.3 MEMBERS

Assessment. The Committee structure should be re-evaluated. The OPEDC currently does not have a member appointed by the Village of Orchard Park nor a representative from the Orchard Park Chamber of Commerce.

1.2.4 LABOR

The Town currently supports the OPEDC by providing the much-needed services of a part time Administrative Assistant (Justine LeFauve). Other Town staff time is available if the effort is reasonable in scope. This policy enables the Committee to limited support on an as needed basis from staff including the Town Attorney, the Town Engineer, the Geographic Information Systems (GIS) specialist, the Town Assessor, and others. To date, the Village government has not provided comparable staff time. However, elected Town and Village officials—including the Village Mayor, the Town Supervisor, and the official Town Board liaison to the Committee—have dedicated countless hours in support of this planning effort.

Assessment. Staff support from the Town has been very important to the OPEDC. Similar support from the Village is desirable.

1.2.5 FINANCIAL SUPPORT

The \$10,000 annual funding established for the OPEDC is no longer in place. In the past, the OPEDC had funds available through the "Clubs and Organizations" line in the Town operating budget. Budget cuts in recent years have eliminated this source of support, which funded the development of the 2008 Strategic Plan as well as the current study.

Assessment

- The OPEDC does not have a long-term plan to ensure ongoing financial support;
 - The OPEDC has not estimated the costs of future strategic planning and implementation activities;
 - No Town or Village financial support is available to fund direct economic development incentives to businesses; and
 - No alternative source of funding has replaced lost funding from the Town.
-

1.2.6 PARTNERSHIPS

No formal or ongoing partnership activities are in place.

Assessment:

- The OPEDC engages in limited and ad hoc use of partnerships and alliances with public sector, nonprofit, or for profit entities;
- No ongoing, formal, or institutionalized partnership relationships or roles are in place.
- The 2008 Plan was not adopted or approved by the Town Board or the Village Board (e.g., Plan recommendations were not incorporated into the Comprehensive Plan or other planning documents);
- No current mechanism is in place to inform and when appropriate, seek input from the Planning Board, the Zoning Board of Appeals, the Comprehensive Planning Committee, Town/Village departments/staff; and other committees and boards; and
- The OPEDC acknowledges the strong assistance and partnership of the Chamber of Commerce in the Business Retention and Expansion (BRE) survey process. This partnership should be formalized and regular and ongoing communication between the OPEDC and the Chamber should occur.

2.0 REGIONAL LOCATION AND SOCIOECONOMIC PROFILE

2.1 REGIONAL LOCATION AND ACCESS

The Town of Orchard Park, NY is located approximately 18 miles south of the City of Buffalo in the center of Erie County and is the hub of the County's "Southtowns" region.

Clockwise starting from the north, the Town shares a border with the Towns of West Seneca, Elma, Aurora, Colden, Boston, Hamburg, and the City of Lackawanna (see Figure 2-1). Orchard Park is a second ring suburb that functions as a transitional area between urbanized areas to the north and west (i.e., Buffalo and Lackawanna) and rural areas to the south and east (i.e., Boston and Aurora). Its central location, with excellent highway access, is a major economic development asset for the community.

Easy and direct access to regional markets makes Orchard Park a desirable location for retailers and provides access for workers and for the shipping and receiving of goods and materials related to industrial and commercial activities.

US 219, a limited access highway that connects directly to the New York State Thruway (I-90) and beyond, provides the region with ready access to the Town and vice versa (see Figure 2-2). US 219 runs north south in the western portion of the town and has interchanges at Milestrip Road, the village (US 20A), and Armor-Deuells Corners. Several major arterial routes also traverse the Town, including US 20 (Southwestern Boulevard), US 20A (Quaker Street), NYS 179 (Milestrip Road), NYS 240 (Buffalo Road), and NYS 277 (Chestnut Ridge Road). US 219 also provides short connections to Interstate-90.

Access to the highway system has had a large impact on development patterns in the western and northern sections of the Town. The opening of the Milestrip Road interchanges not only connected the then named Rich Stadium (now New Era Field) with the region, but also ushered in the development of the McKinley Mall shopping district in nearby Hamburg and more recently, the Quaker Crossing regional shopping center in Orchard Park.

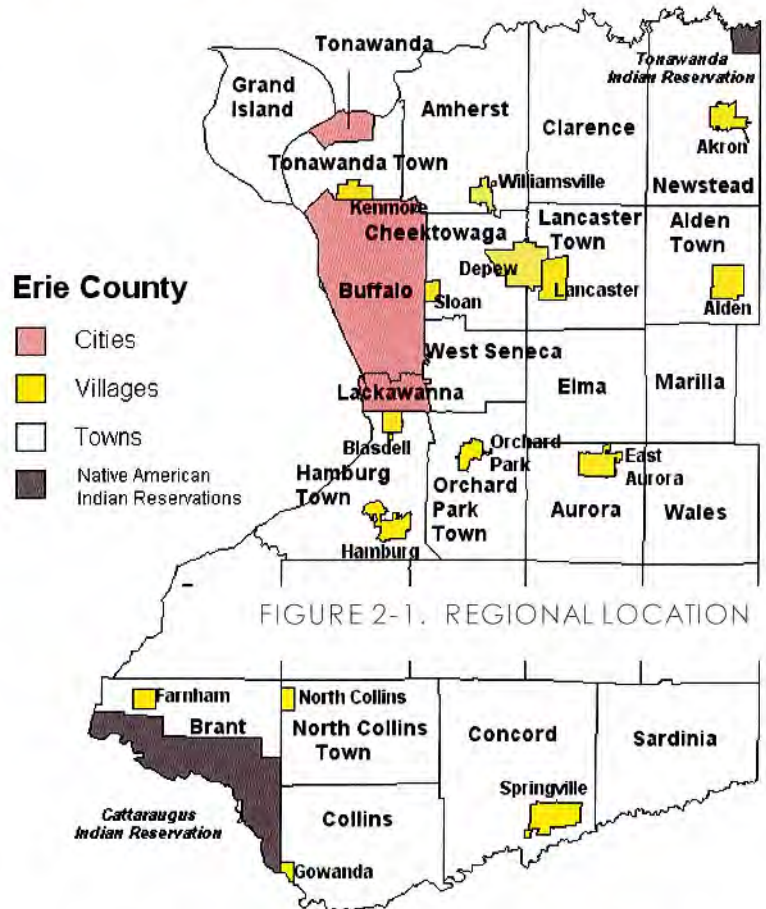


FIGURE 2-1. REGIONAL LOCATION

As described in more detail in Chapter 4, below, other retail plazas and shopping districts line major arterials in the Town, particularly along Routes 20, 20A, and 240 in the northern part of the Town.

2.2 SOCIOECONOMIC PROFILE

2.2.1 REGIONAL POPULATION TRENDS

The population of the Buffalo-Niagara Falls Metropolitan Statistical Area (MSA), which consists of all of Erie and Niagara Counties, peaked at 1.35 million persons in 1970 (see Table 2-1, below).

The Buffalo-Niagara region's overall long-term downward population trend began in that year, with population decreases each decade through 2010. This decline was overwhelmingly attributable to out-migration from the cities of Buffalo, Niagara Falls, and Lackawanna, which lost more than half of their combined population between 1950 and 2010.

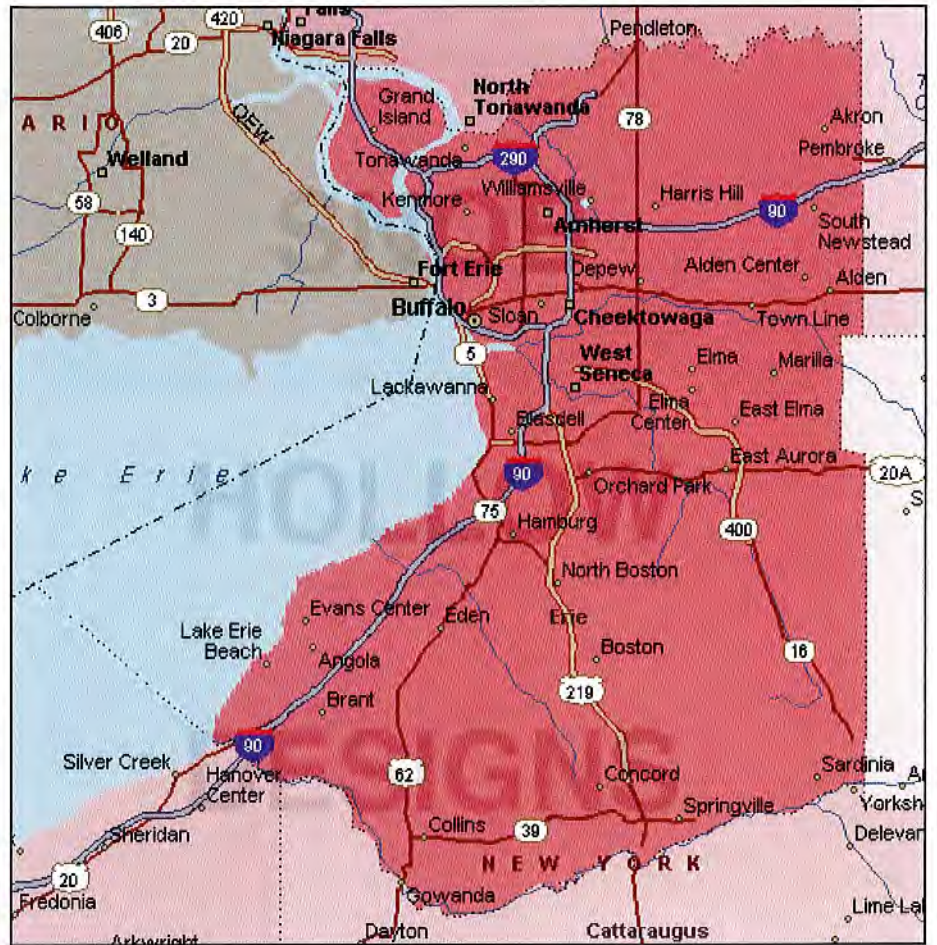


FIGURE 2-2. REGIONAL HIGHWAY CONNECTIONS



Table 2-1
Population Trends, Orchard Park and the Region, 1950-2010

Year	Buffalo-Niagara Falls Metropolitan Statistical Area (MSA)		Cities of Buffalo, Niagara Falls, and Lackawanna		Remainder of Buffalo-Niagara MSA		Town of Orchard Park	
	Population	% Change	Population	% Change	Population	% Change	Population	% Change
1950	1,089,230		698,662		509,098		8,491	
1960	1,306,957	20.0%	664,717	-8.2%	774,198	52.1%	15,876	87.0%
1970	<i>1,349,211</i>	3.2%	577,040	-13.1%	<i>886,443</i>	14.5%	19,978	25.8%
1980	1,242,826	-7.9%	451,955	-22.7%	884,956	-0.2%	24,359	21.9%
1990	1,189,288	-4.3%	410,548	-8.3%	861,165	-2.7%	24,632	1.1%
2000	1,170,111	-1.6%	367,305	-10.8%	877,463	1.9%	27,637	12.2%
2010	1,135,509	-3.0%	329,644	-10.7%	874,199	-0.4%	29,054	5.1%
Change, 1970-2010	-213,702	-15.8%	-247,396	-42.9%	33,694	+4.4%	+ 9,076	45.4%
Change, 1950-2010	+46,279	+4.2%	-369,018	-52.8%	415,297	+106.3%	+20,563	242.2%

Source: U.S. Bureau of the Census.
Italicized numbers reflect year of peak population.

In comparison, the remainder of the region experienced a considerable amount of growth in the 1950's and 1960's because of the movement of people from the cities to the suburbs. The New York State Thruway (later made part of the interstate highway system and designated the Interstate-90 or "I-90") opened across New York State in 1956, facilitating the diaspora from cities to suburban and rural areas. Outside of the cities, the remainder of the population of the Buffalo-Niagara region experienced a modest growth rate of 4.4 percent between 1970 and 2010.

2.2.2 LOCAL POPULATION TRENDS

As shown in Table 2-2 and Figure 2-3, below, the Town of Orchard Park added approximately 4,913 residents between 1990 and 2014, a 20 percent increase. This is double the population growth rate in New York State

over the period. It also stands in sharp contrast to Erie County's loss of 45,697 residents, a nearly five percent drop.

Between 1970 and 2010, the Town of Orchard Park's population growth rate of 45.4 percent also far exceeded the modest increase in the part of the region outside the cities. This growth was in part attributable to the construction of NYS Route 219. In 1973, the Orchard Park interchange and the section of the highway north to its connection with I-90 opened to traffic. This dramatically reduced the driving time from Orchard Park to employment centers to the north. Later, it helped to spur the construction of corporate parks, other industrial and commercial office buildings, and large-scale retail development near the Milestrip Road and NYS Route 20A interchanges.

The population of the Village of Orchard Park has been virtually unchanged at approximately 3,200 residents throughout the 24-year period between 1990 and 2014, reflecting the built out nature and stable housing stock of the village center. While overall, the Town's population grew by 20 percent during the same period; this growth was not steady, increasing by 12.2 percent between 1990 and 2000, only 1.5 percent in the next 10 years, and 5.3 percent in the last four years.

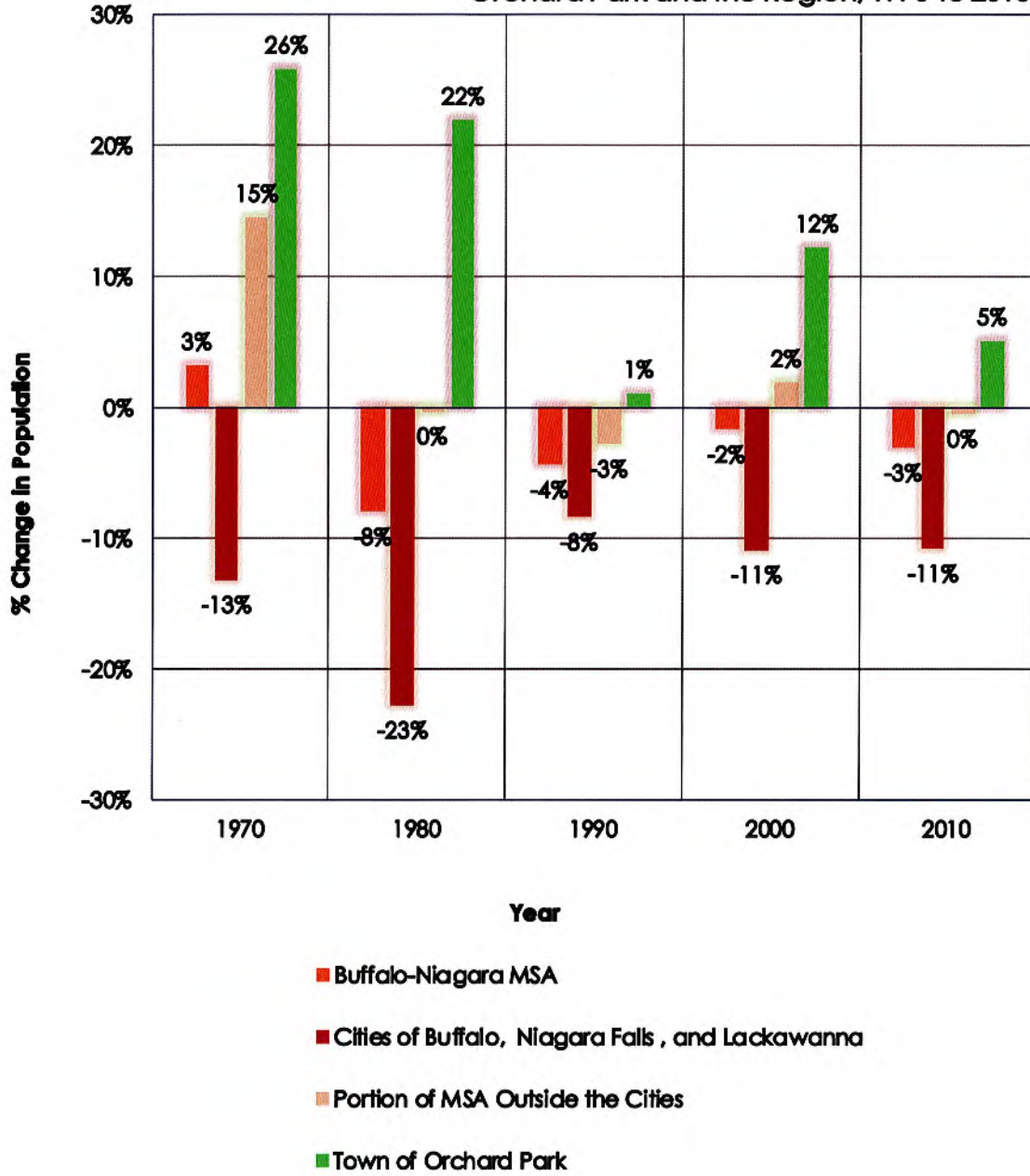
While population shifted between urban, suburban, and rural areas, the region as a whole was not growing. Compared to the state and the nation, which both witnessed considerable growth, the overall population decline in the Buffalo-Niagara region was evidence of deep and prolonged economic distress. In 2014, Erie County as a whole witnessed its first increase in population for 44 years. Table 2-2 shows that the County population rose from 919,064 in 2010 to 922,835 in 2014, a notable turnaround.

Table 2-2.
Comparative Population Trends, 1990-2014
Orchard Park, Erie County, and New York State

	Population		% Change 1990-2000	Population 2010	% Change 2000-2010	Population Estimate, 2014	% Change 2010- 2014	% Change 1990- 2014
	1990	2000						
Orchard Park Town	24,632	27,637	12.2%	28,054	1.5%	29,545	5.3%	19.9%
Orchard Park Village	3,261	3,294	1.0%	3,246	-1.5%	3,219	-0.8%	-1.3%
Erie County	968,532	950,265	-1.9%	919,040	-3.3%	922,835	0.4%	-4.7%
New York State	17,990,455	18,976,457	5.5%	19,378,102	2.1%	19,746,227	1.9%	9.8%

Source: U.S. Department of Commerce. 1990, 2000, and 2010 Census of Population and Housing. 2009-2013 American Community Survey.

Figure 2-3. Rate of Population Change
Orchard Park and the Region, 1970 to 2010



2.2.3 POPULATION CHARACTERISTICS

2.2.3.1 AGE

As shown in Table 2-3, the median ages of the population in the Town (44.4 years) and the Village (42.4 years) are higher than those of Erie County (40.4 years) and the State (37.2 years).

	New York State	Erie County	Orchard Park (Town)		Orchard Park (Village)	
Age Group	Percent	Percent	Persons	Percent	Persons	Percent
Under 5 Years	6.8%	5.3%	1,421	4.9%	186	5.7%
5 to 19 Years	20.4%	19.4%	6,032	20.8%	645	19.9%
20 to 24 Years	7.0%	7.5%	1,294	4.5%	162	5.0%
25 to 44 Years	26.6%	24.0%	6,057	20.8%	764	23.5%
45 to 64 Years	26.4%	28.1%	8,889	30.6%	921	28.4%
65 and Over	13.0%	15.7%	5,361	18.5%	568	17.5%
	100.0%	100.0%	29,054	100.0%	3,246	100.0%
Median Age	37.2	40.4	44.4	--	42.4	--

Source: U.S. Department of Commerce, 2010 Census of Population.

Breaking it down by age group shows that compared to New York State, the Town and Village of Orchard Park have larger proportions of seniors and the elderly and lower proportions of college students and younger workers in the 20 to 24-year-old age bracket and persons aged 25 to 44 years, the prime working age population.

2.2.3.2 INCOME AND EDUCATION

In addition to being a growing community, Orchard Park has a population that is affluent and highly educated. According to the 2010-2014 American Community Survey, median household income was \$81,326 and \$78,466 in the Town and Village, 53 and 42 percent higher, respectively than the median of \$50,653 for all of Erie County.

The 2009-2014 American Community Survey indicated that 2.4 percent of Town residents had incomes below the poverty line, down from 4.3 percent in 2000, far below the poverty rates of the County (14.6 percent) and the State (15.3 percent).

Table 2-4 Orchard Park at a Glance	
Village	Town
Population Estimate (2014)	
3,219	29,545
Median Household Income	
\$ 78,466	\$ 81,326
Persons with Incomes Below Poverty Level	
4.1 %	2.4 %
Educational Attainment (% High School Graduate or Higher)	
99.4 %	96.3%
Median Housing Value	
\$ 218,200	\$193,300
Total Housing Units (2010)	
1,459	12,086
Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates	

Educational attainment is higher among residents of Orchard Park than the County as a whole. In 2010, the percentage of high school graduates among the adult population (25 years of age and over) was 96.3 percent in the Town (up from 90 percent in 2000), compared to 89.8 percent in Erie County (up from 83 percent in 2000). Virtually all Village residents 25 years and over have high school diplomas. Moreover, the proportion of four-year college graduates among Village residents (50 percent) was much higher than the County rate (30.9 percent).

In terms of race and ethnicity, approximately 98 percent of the Town's population is white and non-Hispanic.

2.2.3.3 OCCUPATION

As seen in Table 2-5 and Figure 2-3, 51 percent of the Town's labor force is employed in management and related occupations, much higher than the national average of 35 percent. Sales and office occupations is the second largest occupational group in the Town (23 percent), followed by service occupations (12.4 percent)

Median earnings by occupational group range from a low of \$18,910 for workers in service occupations such as health care support jobs, personal care, building and grounds maintenance, and food preparation and serving) to a high of \$60,979 in the management group. The overall median earnings in the Town is \$45,372 across all occupational groups, which compares to \$33,829 nationally. The highest paying specific occupations in the Town are legal occupations (\$107,002), healthcare practitioners, and other technical occupations (\$101,161).

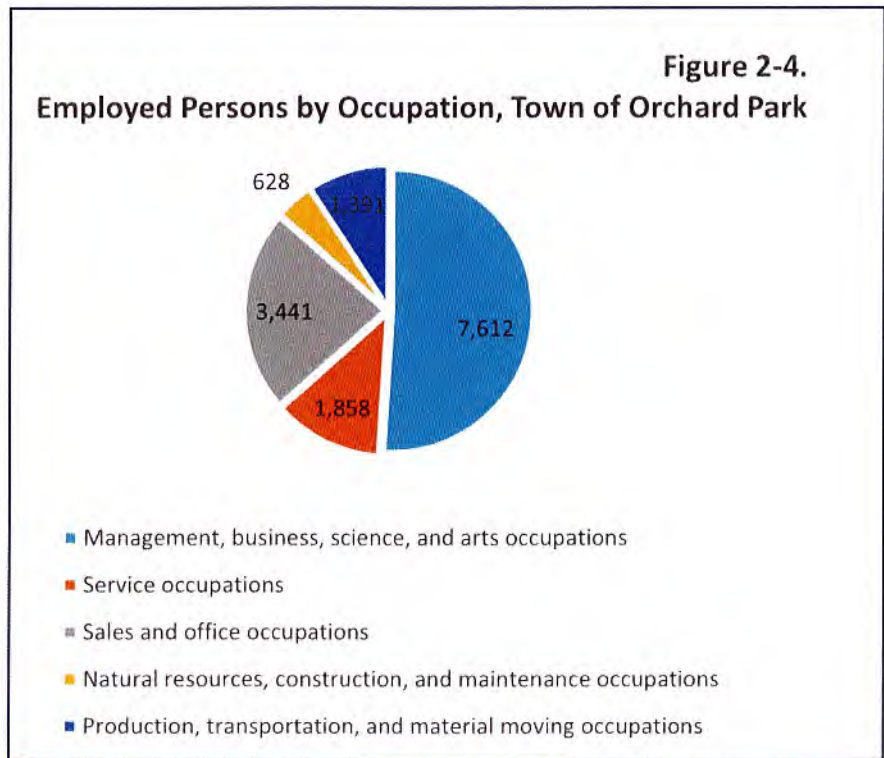
According to the 2009-2013 American Community Survey, the mean commute time of Town residents 16 years and over travelling to work was 23.9 minutes (up from 22.4 minutes in 2000) and 20.9 minutes for Village residents (up from 19.2 minutes in 2000). The length of these commuting times indicates that many employed Town and Village residents work outside of the Town.

Table 2-5 Occupational and Income Characteristics, Town of Orchard Park			
Occupational Group	Workers	% of Total Workforce	Median Earnings
Management, business, science, and arts occupations	7,612	51.0%	\$ 60,979
Service occupations	1,858	12.4%	\$ 18,910
Sales and office occupations	3,441	23.0%	\$ 33,270
Natural resources, construction, and maintenance occupations	628	4.2%	\$ 35,714
Production, transportation, and material moving occupations	1,391	9.3%	\$ 37,337
Civilian employed population 16 years and over	14,930	100.0%	\$ 45,372

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

2.2.4 HOUSING CHARACTERISTICS

In 2010, there were 1,459 housing units in the Village, including 900 owner-occupied units (61.6 percent of the total). Between 2000 and 2014, the Town's housing stock grew to 12,086 units, a 13.5 percent increase since 2000. Thus, between 2000 and 2014, the Town added 1,442 units—roughly the same as the total in the entire village. By 2014, the Town's housing stock comprised 12,104 units, about 80 percent of which were owner-occupied. Housing values are well above regional averages. The 2010-2014 American Community Survey data show that the median value of owner-occupied housing in the Town (\$193,300) was 53 percent higher than that of the County as a whole (\$126,700).



3.0 ECONOMIC CONDITIONS

This chapter describes the economy of Orchard Park by economic sector and sub-sector in terms of the number of businesses, revenues, and employment. Significant changes since the last strategic plan was prepared are identified. Notable comparisons between local economic indicators and county, regional, or statewide conditions are also provided.

3.1 ECONOMIC SECTOR ANALYSIS

3.1.1 U.S. ECONOMIC SECTORS

The primary sector of the economy involves the extraction or harvest of products from the earth and includes the production, packaging, and processing of raw material and basic foods. Activities associated with the primary sector include agriculture, mining, forestry, farming, hunting, fishing, and quarrying. In developed and developing countries, a decreasing proportion of workers are involved in the primary sector. About 3 percent of the U.S. labor force is engaged in primary sector activity today.

The secondary sector involves the manufacture of finished goods. All manufacturing, processing, and construction activities fall within the secondary sector. Activities associated with the secondary sector include metalworking and smelting, automobile production, textile production, chemical and engineering industries, aerospace manufacturing, energy utilities, engineering, breweries and bottlers, construction, and shipbuilding.

The tertiary sector is comprised of service industries. This sector provides services to the general population and to businesses. Activities associated with this sector include retail and wholesale sales, transportation and distribution, entertainment, restaurants, clerical services, media, tourism, insurance, banking, healthcare, and law. In most developed and developing countries, a growing proportion of workers are devoted to the tertiary sector. In the U.S., more than 80 percent of the labor force are tertiary sector workers.

3.1.2 LOCAL ECONOMIC TRENDS BY SECTOR

3.1.2.1 NUMBER OF ESTABLISHMENTS

The 2012 U.S. Economic Census provides the latest available economic data for the Town of Orchard Park by major economic sector. Comparisons are made when appropriate to data from the 2002 Economic Census. Table 3-1 provides data on the number of businesses for the Town, as well as County data and the percentage of economic activity in Erie County that takes place within the Town of Orchard Park. In total, there were 692 business establishments located in the Town of Orchard Park in 2012, up 4.5 percent from 662 firms in 2002. Consistent with national trends, more than 80 percent of the Town's businesses are tertiary (i.e. service) sector businesses. As seen in Table 3-1, health care businesses in Orchard Park comprised one-fifth of the County's total health care establishments in 2012.

Economic Sectors		Number of Firms				
Title	Code	Village	Town Outside Village	Total Town	Erie County	Town % of County
Secondary Sector						
Manufacturing	31-33	6	39	45	1,008	4.5%
Tertiary Sector						
Wholesale Trade	42	9	33	42	998	4.2%
Retail Trade	44	26	92	118	3,343	3.5%
Transportation and Warehousing	48-49	NA	9	NA	588	NA
Information	51	2	11	13	349	3.7%
Finance and Insurance	52	19	44	63	1,296	4.9%
Real Estate and Renting and Leasing	53	10	12	22	785	2.8%
Professional, Scientific and Technical	54	25	60	85	2,138	4.0%
Administrative and support and waste management and remediation services	56	5	55	60	1,476	4.1%
Educational	61	2	11	13	196	6.6%
Health Care and Social Assistance	62	33	105	138	724	19.1%
Arts, Entertainment and Recreation	71	5	13	18	356	5.1%
Accommodation and Food Service	72	14	46	60	2,279	2.6%
Other Services	81	16	51	112	1,752	3.8%
Total		581	744	692	17,288	4.3%

Source: U.S. Department of Commerce, 2012 Economic Census.

3.1.2.2 SALES AND REVENUES

Manufacturing was the largest among the economic sectors in terms of sales and receipts, with 45 establishments generating \$641.0 million in sales and receipts in 2012 (see Table 3-2, below). Manufacturing businesses in Orchard Park experienced tremendous sales growth between 2002 and 2012. Although the number of manufacturing establishments increased by only two firms

Economic Sectors	Sales, Shipments, Receipts, or Revenues (\$1,000)				
	Village of Orchard Park	Town of Orchard Park (Balance)	Total Orchard Park	Erie County	Town % of County
Manufacturing	\$20,156	\$620,803	\$640,959	\$15,835,448	4.0%
Wholesale Trade	\$42,972	\$181,869	\$224,841	\$19,343,197	1.2%
Retail Trade	\$84,230	\$459,113	\$543,343	\$12,106,065	4.5%
Transportation and Warehousing	NA	\$77,282	\$77,282	\$1,907,835	NA
Information	NA	NA	NA	NA	NA
Finance and Insurance	NA	NA	NA	NA	NA
Real Estate and Renting and Leasing	\$12,471	\$19,034	\$31,505	\$862,193	3.7%
Professional, Scientific and Technical	\$9,509	\$38,287	\$47,796	\$862,193	5.5%
Administrative, Support, and Other Services	\$1,299	\$4,416	\$5,715	\$2,343,832	0.2%
Educational	NA	NA	NA	\$62,693	NA
Health Care and Social Assistance	NA	\$268,757	\$268,757	\$4,567,762	NA
Arts, Entertainment and Recreation	NA	NA	NA	\$790,597	NA
Accommodation and Food Service	\$7,452	\$57,266	\$64,718	\$1,871,900	3.5%
Other Services	NA	\$18,811	\$18,811	\$1,059,915	1.8%
Total	\$178,089	\$1,745,638	\$1,681,847	\$61,613,630	3.1%

Source: U.S. Department of Commerce, 2012 Economic Census.
NA: Data not available or withheld for reasons of privacy and security.

between 2002 and 2012, manufacturing sales in the Town of Orchard Park were nearly 70 percent higher than they were a decade earlier (\$378.8 million). Annual sales per establishment increased from \$88.1 million in 2002 to \$142.4 million in 2012.

Based on earnings, the second biggest economic sector in the Town was retail trade, with 118 establishments generating \$543.3 million in sales in 2012, down from 106 firms with \$579.0 million in sales in 2002 (see Table 3-2). Third was the burgeoning health care and social assistance sector. With 2002 sales of \$97.6 million, earnings rose to \$268.8 million by 2012—a 275 percent increase (see Table 3-3, below). This growth reflects the development of health care facilities throughout the town, including the Sterling Drive medical office park on Milestrip Road.

3.1.2.3 EMPLOYMENT

Orchard Park provided the region with 10,209 jobs in 2012, up 23 percent since 2002 (see Table 3-4). With 3,020 jobs in 2012, the health care and social assistance sector added 1,152 jobs between 2002 and 2012 (a whopping 80 percent increase), becoming the biggest source of employment in the Town. With 2,596 jobs in 2012, manufacturing added 482 jobs, a 23 percent increase. Retail employment rose by 24 percent, ending with 2,318 jobs in 2012, up 450 jobs from 1,868 jobs in 2002.

Sector	2002	2012	% Change
Manufacturing	\$ 378,807	\$ 640,959	69.2%
Wholesale Trade	\$ 427,086	\$ 224,841	-47.4%
Retail Trade	\$ 578,975	\$ 543,343	-6.2%
Real Estate and Renting and Leasing	\$ 38,242	\$ 31,505	-17.6%
Professional, Scientific and Technical	\$ 38,566	\$ 47,976	24.4%

Source: U.S. Department of Commerce, 2002 and 2012 Economic Census.

Table 3-4 provides employment data by sector in the Village and Town of Orchard Park. The three largest sectors in terms of total jobs are manufacturing, retail trade, and health and social assistance. Together, these three sectors account for 78 percent of the jobs in the Town. The table also shows that the village center contains a high proportion of the financial services and real estate employment in the town.

3.1.3 INDUSTRY DETAIL FOR TOP SECTORS

3.1.3.1 Manufacturing Sector

Fabricated metal products, machinery, and computer and electronic products are the three largest types of manufacturing in Orchard Park based on the number of firms. The percent of

fabricated metal products and machinery manufacturing businesses in Orchard Park is comparable to that of Erie County. The concentration of computer and electronic manufacturing establishments in Orchard Park is nearly twice that of Erie County. Orchard Park has a rather strong regional presence in the area of electrical equipment, appliance, and component manufacturing, which makes up four percent of Orchard Park's manufacturing activity, compared to only one percent of the County's.

Table 3-4
Employment by Sector, 2012, Orchard Park Village and Town

Sector	Village	Town Outside Village	Total Town	Sector's % of Total Town Employment
Manufacturing	108	2,488	2,596	25.4%
Wholesale Trade	38	377	415	4.1%
Retail Trade	331	1,987	2,318	22.7%
Financial Services	98	251	349	3.4%
Real Estate and Renting and Leasing	67	102	169	1.7%
Professional, Scientific and Technical	81	352	433	4.2%
Administrative Waste Management, Remediation Services	15	606	621	6.1%
Health Care and Social Assistance	NA	3,020	3,020	29.6%
Other	NA	288	288	2.8%
			10,209	100.0%

3.1.3.2 HEALTH AND SOCIAL ASSISTANCE SECTOR

The health and social assistance sector experienced remarkable growth in the last decade. In 2002, this sector accounted for 1,467 of the 9,689 jobs in Orchard Park, about 15 percent of the total. In comparison, in 2012, the health care sector's 3,020 jobs comprised 30 percent of the Town's employment. Total health sector employment in the Town grew from 9,689 to 10,209 jobs, a 5.3 percent increase.

3.1.3.3 RETAIL SECTOR

The retail sector of Orchard Park's economy includes both convenience goods, such as food and gasoline, and comparison goods, such as motor vehicles and clothing. In general, shoppers travel farther to purchase comparison goods than they do to purchase convenience items. The data also show that certain types of comparison goods retailers serve a specific niche in the region. For example, both motor vehicle dealers and home furnishing suppliers make up a larger percentage of Orchard Park's retail trade sector than they do in the County as a whole. In addition, there is larger percentage of non-store retailers—which provide goods via the internet (or a catalogue) in Orchard Park than in the County.

3.2 INDUSTRY CLUSTERS

3.2.1 OVERVIEW

Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region. Clusters arise because they increase the productivity with which companies can compete. The development and upgrading of clusters is an important task for economic development organizations. Cluster industries are export-oriented and sell their services and products to customers outside their home market. These exports, in turn, generate income and employment in the local economy.

3.2.2 INDUSTRIAL CLUSTERS IDENTIFIED BY NEW YORK STATE

In its June 2014 report, *Industry Clusters in New York's Economy: A Statewide and Regional Analysis*, the New York State Department of Labor notes that industry clusters are an important analytical tool for understanding New York's statewide and regional economies. The State of New York uses the clusters framework to study important industry linkages in the state and regional economies. Some of these industry clusters contain more than 100 specific industries. Data for certain industries are pro-rated because not all jobs in that industry are associated with that cluster (e.g., food sales for the travel and tourism sector).

The 2014 report ranks the 16 top clusters for the state as a whole and for its 10 labor market regions using five metrics commonly used in regional economics. These include:

- Total employment
- Total wages
- Annual average wage
- Location quotient (measure of employment concentration); and
- Regional exports (domestic and foreign).

The 16 statewide industry sectors for 2012 are listed in Table 3-5. In Western New York, these industry clusters accounted for 14,425 establishments with total employment of 204,100 persons and total wages of \$10.6 billion. The annual wages of workers employed in companies in the industry clusters averaged \$52,200.

Table 3-5

Industry Clusters in Western New York, 2012

Industry Cluster	Reporting Units	Jobs	Rank in Region	Total Wages (\$millions)	Rank in Region	Average Wage	Rank in Region
Front Office & Producer Services	2,519	33,000	1	\$2,212.2	1	\$66,900	3
Travel & Tourism	4,765	27,100	2	\$636.0	6	\$23,500	16
Financial Services	1,639	25,800	3	\$1,513.8	2	\$58,600	6
Industrial Machinery & Services	607	24,300	4	\$1,453.3	3	\$59,700	5
Distribution	2,398	19,900	5	\$1,010.8	4	\$50,800	10
Back Office & Outsourcing	408	15,400	6	\$509.4	7	\$33,000	15
Materials Processing	264	12,800	7	\$827.7	5	\$64,700	4
Food Processing	282	9,800	8	\$443.6	8	\$45,400	13
Communications, Software & Media Services	452	9,100	9	\$425.0	10	\$46,500	12
Biomedical	200	6,200	10	\$338.4	12	\$54,600	9
Information Technology Services	479	6,000	11	\$438.8	9	\$73,400	2
Transportation Equipment	43	4,900	12	\$361.2	11	\$74,400	1
Forest Products	136	4,200	13	\$181.9	13	\$43,800	14
Miscellaneous Manufacturing	95	2,100	14	\$100.4	15	\$47,100	11
Electronics & Imaging	51	1,900	15	\$104.5	14	\$56,400	8
Fashion, Apparel & Textiles	87	1,600	16	\$92.7	16	\$57,800	7
Total, All Clusters	14,425	204,100		\$10,649.6		\$52,200	

Sources: New York State Department of Labor, Quarterly Census of Employment and Wages; EMSI; Empire State Development

Top Five Western New York Industrial Clusters Ranked by Employment:

1. Front Office & Producer Services
2. Travel & Tourism
3. Financial Services
4. Industrial Machinery & Services
5. Distribution

Top Five Western New York Industrial Clusters Ranked by Total Wages:

1. Front Office & Producer Services
2. Financial Services
3. Industrial Machinery & Services
4. Distribution
5. Materials Processing

Top Five Western New York Industrial Clusters Ranked by Annual Average Wage:

1. Transportation Equipment
2. Information Technology Services
3. Front Office & Producer Services

4. Materials Processing
5. Industrial Machinery & Services

The rankings above show that transportation equipment and information technology services offer the best-paying jobs of the industry clusters in Western New York, with average annual wages of \$74,400 and \$73,400, respectively. However, in terms of which sectors contribute the largest number of jobs in the region, the front office and producer services and the travel and tourism industry clusters top the list, at 33,000 and 27,000 jobs, respectively. In comparison, together, transportation equipment and information technology provide just over 500 jobs. Based on the data provided above for Orchard Park, the state-defined industry clusters best represented in the Town include biomedical, advanced manufacturing, and industrial machinery.

3.2.3 INDUSTRY CLUSTERS IDENTIFIED BY BUFFALO NIAGARA ENTERPRISE

Buffalo Niagara Enterprise (BNE), a nonprofit, private business development and regional marketing organization dedicated to promoting the Buffalo-Niagara region for economic development purposes, identifies six "industry clusters" in Western New York:

- Advanced Manufacturing
- Agribusiness Materials Processing
- Cleantech
- Life Sciences
- Logistics
- Tourism

LIFE SCIENCES CLUSTER

The life sciences cluster includes pharmaceutical manufacturers, biotechnology companies, medical device manufacturers, biomedical software and service companies. In addition, the life sciences industry cluster includes many businesses that directly support the life science sector, such as equipment suppliers. Medical devices manufacturers and suppliers make up half of the life sciences industry in the Buffalo-Niagara region. More than 60 medical device-related companies do business in the region, among them manufacturers of anesthesia equipment, high-tech fabrics, pumps, imaging tools, ophthalmic instruments, filtration media, and dental equipment manufacturing and laboratories, and infusion pumps. The BNE identifies companies located in Orchard Park that are part of the life sciences cluster in the Buffalo-Niagara region. These are listed in Table 3-6, below.

Buffalo-Niagara is a center for molecular medicine, oncology, medical devices, drug discovery and development, and bioinformatics. Western New York has more than 130 life sciences companies employing some 6,500 workers. Regional institutions grant 1,000 life sciences degrees annually. Buffalo-Niagara ranks in the top five regions in the nation in terms of the number of science and engineering degrees per capita granted each

year. Within a 90-mile radius of Buffalo, there are approximately 650 medical industry companies and research institutions

Table 3-6. Buffalo-Niagara Life Sciences Cluster Companies Located in Orchard Park, NY (2015)		
Company Name	Location	Description
Accellent Endoscopy	3902 Orchard Park Road	Provides engineering, product development, and manufacturing services to medical device companies.
Curbell Electronics	7 Cobham Drive	Manufacturer of pillow speakers, nurse call products, patient monitoring products, healthcare bed products, fall management systems, or hospital room television controls.
Lam Design Management LLC	82 Stonehenge Drive	Consulting and design firm specializing in rehabilitation equipment.
The Mentholatum Company Inc.	707 Sterling Drive	Markets and distributes non-prescription ointments and other health care products.
Piramal Critical Care	50 Cobham Drive	Anesthetic pharmaceutical company.
Polymer Conversions	5732 Big Tree Road	Offers precision, custom injection molding, specializes in technical, tight-tolerance medical devices.
ResiCal Inc.	36 Cherry Tree Lane	Privately held pharmaceutical company. Products include ointments and skin treatments.
SciBiz International	56 Henning Drive	SciBiz provides complete marketing, business development, and sales consulting services for diagnostic, medical device and research oriented firms.
Value Centric	23 Cobham Drive	Provider of on-demand data management and performance analytics to the pharmaceutical industry.

Source: Buffalo-Niagara Enterprise, 2015.

The life sciences industry cluster contains three related sub clusters—research, medical products, and pharmaceuticals. The Buffalo Niagara Medical Campus (BNMC) in downtown Buffalo is the heart of the region's life sciences research activity. A consortium of the region's premier clinical care, research and medical institutions, the BNMC includes Roswell Park Cancer Institute, the New York State Center of Excellence in Bioinformatics and Life Sciences, the University at Buffalo, and Hauptman-Woodward Medical Research Institute.

The medical products sub cluster includes producers of laboratory, surgical, medical, dental, and ophthalmic equipment for the health care industry. This sub cluster is well represented in Orchard Park. Pharmaceutical companies in Western New York are located predominantly in Amherst, Buffalo, and Grand Island.

4.0 ZONING AND LAND USE

4.1 ZONING

4.1.1 ZONING OVERVIEW

The Town has 14 zoning districts: Industrial (I1), Development and Research (DR), four Business zones (B1-B4), four Residential zones (R1-R4), Agricultural (A1), Land Conservation, (LC), the “floating” Senior Residential (SR) zone, and the Conservation Management Overlay zone.

The Agricultural (A1) district allows low-density housing as well as farming uses. The A1 zone is mapped over most of the Town south of Powers Road (with the exception of Chestnut Ridge Park, which is zoned LC). The Land Conservation (LC) district, in which development is prohibited, is mapped on most of the Town’s public parks. The DR Zone is intended to promote technology based industrial development as well as a variety of retail uses. Business zones permit freestanding stores, as well as plazas, strip malls, and larger business operations, such as business centers. The Business zones are mapped along commercial corridors and at major intersections and highway interchanges in the northern portion of the Town. According to the U.S. Census Bureau, the Town of Orchard Park covers 38.44 square miles or about 24,602 acres of land. The pattern of zoning in the Town is shown on Figure 4-1, Zoning, and a detailed Table of Use Regulations is provided in Table 4-1, below.

Each zoning classification defines the use, scale, and density of development. Bulk regulations include setbacks, minimum and maximum building footprint and height, and minimum lot sizes. The zoning also establishes requirements for green space and landscaping.

The Village has eight zoning districts, including two one-family Residential districts (R-1 and R-2); two districts that allow one-, two-, and multi-family residences (R-3 and R-4); B-1 Commercial; B-2 Professional-Commercial; I-1 Industrial; and L-C Land Conservation.

4.1.2 INDUSTRIAL ZONING

The Town’s Industrial zone permits clean manufacturing and office park uses, including professional offices, lumberyards, warehouses, hospitals, nursing homes, and private schools. The Town’s Industrial (I1) zoning district covers about 1,146 acres centered along US 219 in the northeast portion of the Town. The I1 district is mapped on both sides of US 219 north of Route 20A (West Quaker Street). Individual parcels in the Industrial zone are accessible from major arterial routes, including US 20 (Southwestern Boulevard), US 20A (Quaker Street), and NYS 179 (Milestrip Road). The I1 zone is also mapped along secondary roads, including South Taylor Road, California Road, Centre Drive, Cobham Drive, and Mid County Road.

The Industrial zoning district covers approximately 4.7 percent of the Town’s land area. Figure 4-2 shows the land use status of parcels in the I1 zoning district. Data on the acreage occupied by these different land uses is provided in Table 4-2. As the map and table show, much of the Town’s limited industrially zoned land is occupied by other land uses.

Figure 4-1

TOWN OF ORCHARD PARK Zoning

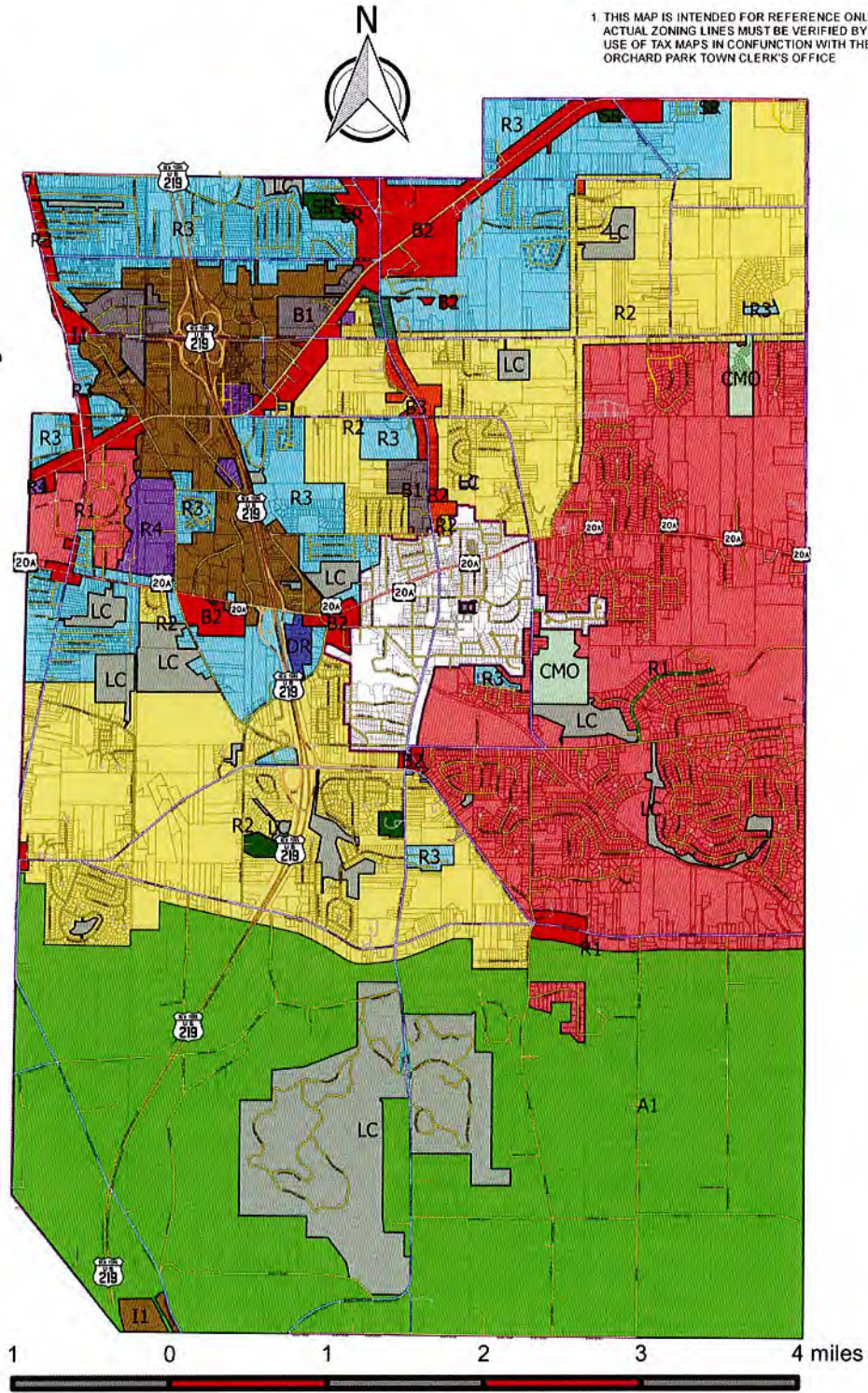
Legend

Zoning

- A1
- B1
- B2
- B3
- B4
- CMO
- DR
- I1
- LC
- R1
- R2
- R2 halch
- R3
- R4
- SR

NOTES

1 THIS MAP IS INTENDED FOR REFERENCE ONLY
ACTUAL ZONING LINES MUST BE VERIFIED BY
USE OF TAX MAPS IN CONJUNCTION WITH THE
ORCHARD PARK TOWN CLERK'S OFFICE



Uses	Table of Use Regulations, Town of Orchard Park												
	A1	LC	R1	R2	R3	R4	B1	B2	B3	B4	CMO	DR	I-1
Agricultural, dairying, forestry, general farming, greenhouse, hatcheries, horticulture, livestock raising, paddocks, truck farming	PP												
Churches and other houses of worship	PP		PP	PP	PP	PP							
Dwellings, one-family	PP		PP	PP	PP	PP							
Dwellings, two-family					PP	PP							
Dwellings, multiple and townhouses					SE	PP							
Recreation areas (public)			PP	PP	PP	PP							
Schools (public, private or nonprofit)			PP	PP	PP	PP							
Golf course, except driving range or miniature golf	SE		SE	SE	SE	SE							
Home occupation	SE				SE	SE							
Private recreation club	SE		SE	SE	SE	SE							
Public stable	SE		SE	SE	SE	SE							
Retail nurseries	SE												
Riding academy	SE												
Tennis court	SE		SE	SE	SE	SE							
Farm			PP	PP	PP								
Tourist homes					PP								
Daycare center									PP				
Essential services		SE											
Parks, golf courses, athletic fields, and other similar uses		SE											
Offices: medical, private, professional, public.										PP			
Commercial parking lot								PP		PP			PP
Enclosed amusement uses including billiard and pool parlors, bowling alleys, skating rinks, and similar								PP					PP
Exterior display								PP					PP
Hospital, sanatorium, nursing or convalescent home							SE	PP	PP				PP
Hotels and motels								PP				PP	PP
Indoor movie theaters								PP					
Medical office building							SE						
Retail sales occupying not more than 1/3 of the floor area of the structure and is incidental to office use										PP			
Eating and drinking establishments								PP				PP	
Banks and financial institutions								PP	PP				
Retail or service establishments such as clothing stores and hardware stores								PP	PP				
Retail or service establishments such as food stores and supermarkets								PP					
Business and professional offices, including medical								PP	PP				
Restaurants							SE						SE
Sales and rental of garden tools, machinery and equipment								PP	PP				
Sales, service and repair establishments of electricians plumbing, heating and refrigeration specialists								PP	PP				
Television and household appliance services								PP	PP				

Small sales and service shops										PP				
Shopping or business center							PP	PP						
Assembly, testing and calibration of components, devices, systems and electronic, scientific, medical, optical, biochemical, chemical, metallurgical and pharmaceutical equipment												PP		
Audio components, radio and television equipment														
Communication, navigation, control, transmission and reception equipment												PP	3	
Compounding, manufacturing and assembly of: electrical and electronic equipment and appliances; and musical, scientific, medical, dental and photographic instruments equipment and supplies												PP		
Control equipment and guidance systems												PP		
Microfilming and record preparation												Land PP		
Printing, publishing and engraving												PP		
Retail sale of products manufactured, compounded or assembled or stored on the premises occupying not more than 15% of the gross floor area of the principal structures												PP		
Scientific and medical instruments												PP		
All franchised dealers and showrooms								SE						
Automotive service							SE	SE						
Car washing establishments								SE						
Enclosed manufacturing, assembly or other light industrial operations, such as the following: laboratory facilities; light manufacturing of electrical equipment; metal fabrication; furniture and the like; collision shops; public garages													PP	
Lumberyards													PP	
Warehousing and distribution												PP		
Warehouses for enclosed storage of goods and materials, distribution plants, wholesale businesses												PP	PP	
Contractor equipment and supplies													SE	
Franchised motor vehicle dealerships													SE	
Adult uses													SE	

Industrial uses permitted as principal uses in the Industrial District include enclosed manufacturing, assembly or other light industrial operations, such as the following:

- laboratory facilities;
- light manufacturing of electrical equipment;
- metal fabrication;
- furniture and the like;
- collision shops; and
- public garages.

Other principal uses allowed include:

- commercial parking lots;
- lumberyards;
- warehouses for enclosed storage of goods and materials,
- distribution plants, and
- wholesale businesses.

Also permitted, as principal uses in the I1 district are a number of non-industrial uses including:

- hospitals, sanatoriums, nursing or convalescent homes;
- businesses and professional offices, including medical offices;
- restaurants; and
- adult uses.

Uses allowed by special exception include:

- contractor equipment and supplies
- franchised motor vehicle dealerships; and
- hotels/motel

The Village's Industrial (I-1) district allows manufacturing, assembly, laboratory, fabrication, and warehousing. Automotive uses, truck terminals, adult uses, and "other similar uses" are allowed with a special use permit. The I-1 district requires a minimum lot size of 20,000 square feet. Buildings may cover no more than 40 percent of the site. The I-1 district is located in the southwest corner of the village, extending along Thorn Avenue and adjoining side streets south to the village line roughly between West Quaker Street and Highland Avenue.

4.1.3 BUSINESS-COMMERCIAL ZONING

Commercial districts (B1 to B4) cover about 2.5 percent of the town's land area. The B-2 district is the most widely mapped of these districts, covering much of the frontage along Southwestern Boulevard and Abbott Road as well as at commercial nodes throughout the Town (i.e., on Route 20A west of the Village, at Route 240/277 and Jewett Holmwood and at Route 240 and South Freeman Road). The B-2 regulates neighborhood and community scale shopping plazas, professional offices, and stores. The B1 zone is a specialty district that regulates medical uses and is mapped on specific medical development parcels.

There is only one B3 district, mapped along much of North Buffalo Street from the Village line to Milestrip Road. The B4 designation allows professional offices, associated minor retail and parking, and is mapped on one site along Route 240 south of Southwestern Boulevard.



Figure 4-2


TOWN OF ORCHARD PARK Status of Industrial Zoned Property

Legend

Use Status

-  Vacant w/Improvements
-  Vacant commercial
-  Vacant industrial
-  Warehouse
-  Manufacturing
-  Office building

Zoning

-  I1 - Industrial

