

# THE TRANSPORTATION EQUIPMENT INDUSTRY CLUSTER IN NEW YORK STATE

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## Summary

The Transportation Equipment cluster includes manufacturers of equipment for transporting people and goods. Vehicles produced by firms in this cluster include automobiles and light trucks; medium and heavy trucks; commercial surface transport passenger vehicles such as buses and railroad equipment; aircraft and other aerospace equipment; and miscellaneous vehicles.

Transportation equipment firms in New York State employed 42,294 workers at 466 establishments in 2001.

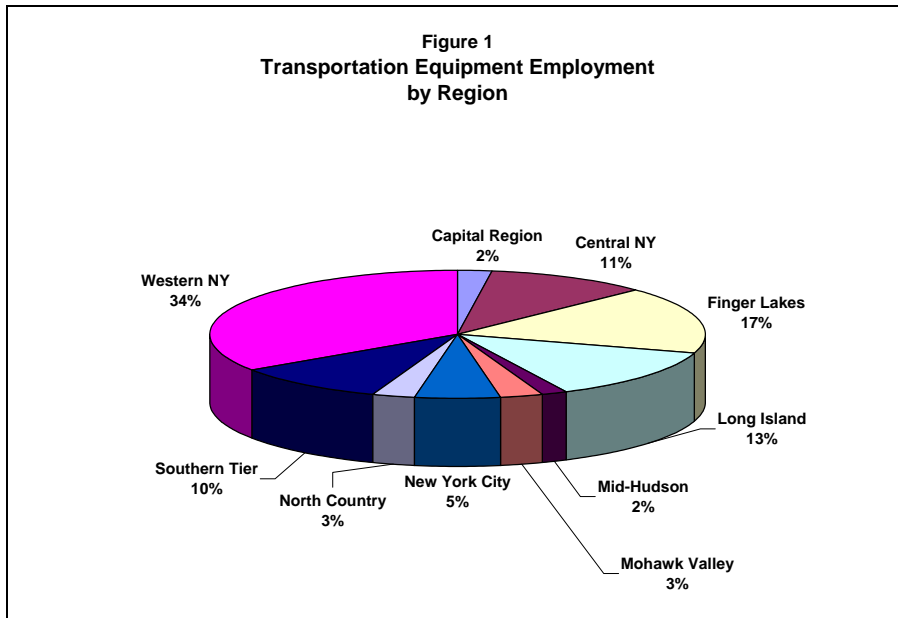
Motor vehicles account for about 75% of employment in New York's Transportation Equipment cluster, with most of these jobs in parts manufacturing. Aerospace and railroad equipment are also well-represented in several regions of the state.

Over one-third of total cluster employment was in the Western New York region. The Finger Lakes, Long Island, Central New York and Southern Tier regions also have sizeable presences in this cluster.

Transportation equipment cluster component suppliers are rapidly consolidating and taking on functions previously performed by major producers. New York sites are competitive for suppliers because New York offers a well-educated, flexible labor force and sophisticated support services for transportation equipment cluster industries.

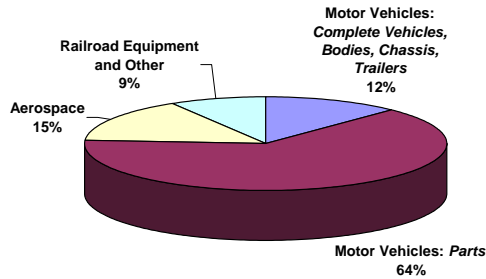
## New York State Profile and Trends

Transportation equipment firms in New York State employed 42,294 workers at 466 establishments in 2001. Over 50% of the state's total employment in the cluster was located in two regions – Western New York (Buffalo/Niagara Falls) and the Finger Lakes (Rochester). Over one-third of total employment was in Western New York alone. (See Figure 1.)



Motor vehicles account for about 75% of employment in New York's Transportation Equipment cluster, with most of these jobs in parts manufacturing. Motor vehicle parts accounts for 64% of total cluster employment, while an additional 12% of employment is in final or near-final motor vehicles (complete vehicles, bodies, chassis, trailers). Aerospace accounts for 15% of total employment, with the remaining 9% composed of railroad, ship and miscellaneous transportation equipment. (See Figure 2). Railroad equipment production is especially concentrated in the Southern Tier (e.g., Alstom Transportation) and North Country (e.g., Bombardier Transportation) regions.

**Figure 2  
Transportation Equipment Employment  
by Subsector**



New York State sites for Transportation Equipment production benefit from size of operations and strong labor force capabilities. New York State sites (especially in the Western, Finger Lakes, Central and Southern Tier regions) offer easy access to Mid-Western headquarters and assembly facilities; sophisticated educational and financial institutions; high-speed freight facilities; and highly trained, flexible, stable labor forces.

### **Regional Highlights**

*Western New York (Buffalo, Jamestown, Niagara Falls)*

	<b>Establishments</b>	<b>Employment</b>	<b>Location Quotient</b>
<b>Motor Vehicle</b>	48	14208	2.47
<b>Aerospace</b>	3	260	0.11
<b>Railroad Eqmt and Other</b>	9	129	0.13

Regional employment in Transportation Equipment was 14,598 at 60 establishments.

The region has a concentration of employment in this cluster that is 59% greater than would be expected from national employment patterns.

Subsectors with significant employment concentrations include Motor Vehicles (LQ = 2.47) and Motor Vehicle Parts (3.78). Regional employment in Motor Vehicles was 14,208.

Transportation Equipment Industries with significant employment concentrations include Motor Vehicle Steering and Suspension Components Manufacturing (5,268 jobs), Motor Vehicle Electrical and Electronic Equipment Manufacturing (4,761) and Motor Vehicle Metal Stamping Manufacturing (2,107).

Some regional Transportation Equipment companies include:

- General Motors Corp: manufacturer of engines in Tonawanda
- Delphi Automotive Systems: producer of radiators and heat exchangers in Lockport
- American Axle: produces axle assemblies, linkages and forgings in Tonawanda

*Finger Lakes (Rochester)*

	<b>Establishments</b>	<b>Employment</b>	<b>Location Quotient</b>
<b>Motor Vehicle</b>	24	7129	1.38
<b>Aerospace</b>	0	0	0.00
<b>Railroad Eqmt and Other</b>	8	85	0.09

Regional employment in Transportation Equipment was 7,215 at 32 establishments.

Most regional Transportation Equipment is in Motor Vehicles Manufacturing (7,129 jobs), with most of these jobs (6,908) in Motor Vehicles Parts Manufacturing.

Regional employment in Motor Vehicle Manufacturing is 38% greater than would be expected from national employment patterns. The location quotient for Motor Vehicle Parts is 2.10.

The region had a high employment level in Motor Vehicles Electrical and Electronic Equipment (6,331 jobs).

Some regional Transportation Equipment companies include:

- Delphi Automotive Systems: produces automotive fuel and emissions control systems and components in Rochester
- Gleason Corporation: produces machines for the production, finishing and testing of gears used in drive trains
- Alstom S.A.: produces signaling and train control systems in Rochester

*Long Island*

	<b>Establishments</b>	<b>Employment</b>	<b>Location Quotient</b>
<b>Motor Vehicle</b>	73	1568	0.14
<b>Aerospace</b>	59	3814	0.83
<b>Railroad Eqmt and Other</b>	18	97	0.05

Regional employment in Transportation Equipment was 5,479 at 150 establishments.

Within Transportation Equipment the region specializes in Aerospace manufacturing. Long Island employment in Aerospace was 3,814.

Industries with significant employment concentrations include Aircraft Manufacturing (1,756 jobs), Other Aircraft Parts Manufacturing (1,419) and Aircraft Engines and Engines Parts Manufacturing (631 jobs).

Some regional Transportation Equipment companies include:

- Northrop Grumman: manufacturers radar and warfare simulation equipment in Bethpage
- Stellex Monitor Aerospace Corp.: manufacturers aircraft and aerospace equipment in Amityville
- B H Aircraft co. Inc.: manufacturers mechanical & electronics replacement aircraft parts in Ronkonkoma

*Central New York (Syracuse)*

	<b>Establishments</b>	<b>Employment</b>	<b>Location Quotient</b>
<b>Motor Vehicle</b>	25	4427	1.39
<b>Aerospace</b>	1	20	0.01
<b>Railroad Eqmt and Other</b>	2	20	0.03

Regional employment in Transportation Equipment was 4,467 at 28 establishments.

Most regional Transportation Equipment is in Motor Vehicle Manufacturing (4,427 jobs), with most of these jobs (3,608) in final or near-final Motor Vehicle Manufacturing.

Regional employment in Motor Vehicle Manufacturing is 39% greater than would be expected from national employment patterns.

The region had a high employment level in Motor Vehicle Body Manufacturing (3,608 jobs).

Some regional Transportation Equipment companies include:

- Magna Drivetrain: produces transmissions and transfer cases for four-wheel drive vehicles in East Syracuse
- Lockheed Martin Naval Electronics and Surveillance Systems: produces ground-based and airborne radar systems for surface vessels and submarines in Liverpool

*Southern Tier (Binghamton, Elmira, Hornell)*

	<b>Establishments</b>	<b>Employment</b>	<b>Location Quotient</b>
<b>Motor Vehicle</b>	13	2418	0.89
<b>Aerospace</b>	7	937	0.83
<b>Railroad Eqmt and Other</b>	7	884	1.85

Regional employment in Transportation Equipment was 4,239 at 27 establishments.

Regional employment spans the Motor Vehicles (2,418 jobs), Aerospace (937 jobs) and Railroad Equipment and Other (884 jobs) subsectors.

Employment in the Railroad Equipment and Other subsector is 85% greater than would be expected from national employment patterns. The location quotient for Motor Vehicle Parts is 1.34.

Industries with significant employment levels included Motor Vehicle Transmission and Power Train Parts Manufacturing (1,590 jobs), Railroad Rolling Stock Manufacturing (857 jobs), Aircraft Engines and Engine Parts Manufacturing (483 jobs) and Aircraft Manufacturing (447 jobs).

Some regional Transportation Equipment companies include:

- Borg-Warner-Morse Tec in Ithaca: produces engine timing components, transmission drive chains and sprockets.
- Schweizer Aircraft, in Big Flats: produces helicopters, reconnaissance aircraft and unmanned vehicles
- BAE Systems, North America, in Johnson City: produces aerospace products and intelligent electronic systems.

## **Regional Transportation Equipment Companies**

### **Company Name**

### **City**

#### **Capital Region (Albany, Schenectady, Troy)**

General Electric Trans Systems	Latham
Honeywell Friction Material	Green Island
Racemark International LP	Malta

#### **Central New York (Syracuse)**

Bombardier Transportation	Auburn
Jaquith Industries Inc	Syracuse
Magna Drivetrain	East Syracuse
TRW Automotive	Auburn

#### **Finger Lakes (Rochester)**

Automotive Corp Inc	Batavia
Brunner International Inc	Medina
Delphi Automotive Systems	Rochester
Jada Precision Plastics Co Inc	Rochester
Parker Hannifin Corp	Clyde
Prestolite Electric Inc	Arcade
Valeo Electrical Systems	Rochester

#### **Long Island**

Alken Industries Inc	Ronkonkoma
Arkwin Industries Inc	Westbury
B H Aircraft Co Inc	Ronkonkoma
B/E Aerospace Lighting Corp	Holbrook
CPI Aerostructures Inc	Edgewood
Davis Aircraft Products Co Inc	Bohemia
Dejana Truck & Utility Eqmt Co	Kings Park
East West Industries Inc	Ronkonkoma
Ellanef Manufacturing Corp	Bohemia
Genmech Aerospace Corp	Farmingdale
Jamco Aerospace Inc	Deer Park
NASTRA Automotive Industries	Lindenhurst
Precision International Auto	Bohemia
Smiths Aerospace Electronic	Bohemia
Stellex Monitor Aerospace Corp	Amityville
Stidd Systems Inc	Greenport
TCI Inc	Hauppauge
U S A Industries Inc	Bay Shore

**Mid-Hudson Region**

Chromalloy New York	Orangeburg
Derecktor Shipyard Inc	Mamaroneck
General Motors Corp	Purchase
Ronal Industries Inc	Port Chester
US Bus Corp	Suffern
V-Twin Mfg	Vails Gate

**Mohawk Valley (Utica, Rome)**

Goodrich Corp	Rome
Orion Bus Industries Parts Inc	Oriskany
Taylor Made Group	Gloversville
TECT Utica Corp	Whitesboro

**North Country (Ogdensburg, Plattsburgh, Watertown)**

Bombardier Transportation	Plattsburgh
General Motors Corp	Massena
New York Air Brake Corp	Watertown
TransEd Inc	Plattsburgh
Wabtec Stone Air	Plattsburgh

**New York City**

Arc Remanufacturing Inc	Astoria
B & I Fender Trims Inc	Maspeth
Caddell Dry Dock & Repair Co	Staten Island
Cox & Co Inc	New York
Interdynamics Inc	Brooklyn
Joldeson One Aerospace Inds	Ozone Park
May Ship Repair Contracting	Staten Island
Precision Gear Inc	College Point
Reynolds Shipyard Corp	Staten Island
Rosco Inc	Jamaica
S & L Aerospace Metals	Maspeth
Standard Motor Products Inc	Long Island City

**Southern Tier (Binghamton, Elmira, Hornell)**

Alstom Transportation Inc	Hornell
Alstom Transportation Inc	Hornell
BAE Systems Controls Inc	Johnson City
Corning Inc	Painted Post
Keytronics Inc	Endicott
Schweizer Aircraft Corp	Horseheads
TTA Systems LLC	Hornell
Unison Industries Inc	Norwich

**Western New York (Buffalo, Jamestown, Niagara Falls)**

American Axle & Manufacturing	Buffalo
American Rubber Products Corp	North Tonawanda
AMPAC ISP Corp	Niagara Falls
Crewson Industries	Buffalo
Delavan Industries Inc	West Seneca
Delphi Thermal & Interior Syst	Lockport
Enidine Inc	Orchard Park
Ford Motor Co Inc	Buffalo
General Motors Powertrain	Buffalo
GM Powertrain Group	Buffalo
Moog Inc	East Aurora
MRC Bearings Inc	Jamestown
Par-Foam Products Inc	Buffalo
R D Murray Inc	Hamburg
Taylor Devices Inc	North Tonawanda
Transpro	Buffalo
Truck-Lite Co Inc	Jamestown
Unicell Body Co Inc	Buffalo
Viking Lockport LLC	Lockport
Visteon Climate Control Sys	West Seneca

## APPENDIX A: Cluster Definition

Empire State Development defines the Industrial Machinery cluster as composed of these NAICS industries:

### **Motor Vehicles Subcluster**

336111	Automobile Manufacturing
336112	Light Truck and Utility Vehicle Mfg
336120	Heavy Duty Truck Manufacturing
336211	Motor Vehicle Body Manufacturing
336212	Truck Trailer Manufacturing
336213	Motor Home Manufacturing
336214	Travel Trailer and Camper Manufacturing
336311	Carburetor, Piston, Piston Ring, and Valve Manufacturing
336312	Gasoline Engine and Engine Parts Manufacturing
336321	Vehicular Lighting Equipment Manufacturing
336322	Other Motor Vehicle Electrical and Electronic Equipment Manufacturing
336330	Motor Vehicle Steering and Suspension Components
336340	Motor Vehicle Brake System Manufacturing
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing
336360	Motor Vehicle Seating and Interior Trim Manufacturing
336370	Motor Vehicle Metal Stamping
336391	Motor Vehicle Air-Conditioning Manufacturing
336399	All Other Motor Vehicle Parts Manufacturing

### **Aerospace Subcluster**

336411	Aircraft Manufacturing
336412	Aircraft Engine and Engine Parts Manufacturing
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing
336414	Guided Missile and Space Vehicle Mfg
336415	Guided Missile and Space Vehicle Propulsion Unit and Parts Mfg
336419	Other Guided Missile and Space Vehicle Parts and Equipment Mfg

### **Railroads and Other Subcluster**

336510	Railroad Rolling Stock Manufacturing
336611	Ship Building and Repairing
336612	Boat Building
336991	Motorcycle, Bicycle, and Parts Manufacturing
336992	Military Armored Vehicle, Tank, and Tank Component Manufacturing
336999	All Other Transportation Equipment Manufacturing

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