

Study Area

Agriculture, as an industry, does not respect the confines of political jurisdictions, and is therefore best analyzed and benchmarked by other measures. The rationale for this is simple, inputs and outputs are marketed and distributed on an increasing broader geographic scale making the agricultural “service area” within which a County’s industry operates significantly larger. In addition, the economic performance of agriculture within a county is often better benchmarked using a broader yardstick such as a region or state. In order to accomplish this effectively, the project team developed multiple target market profiles categorized as follows:

Primary Market Area: Livingston County (See Map 1)

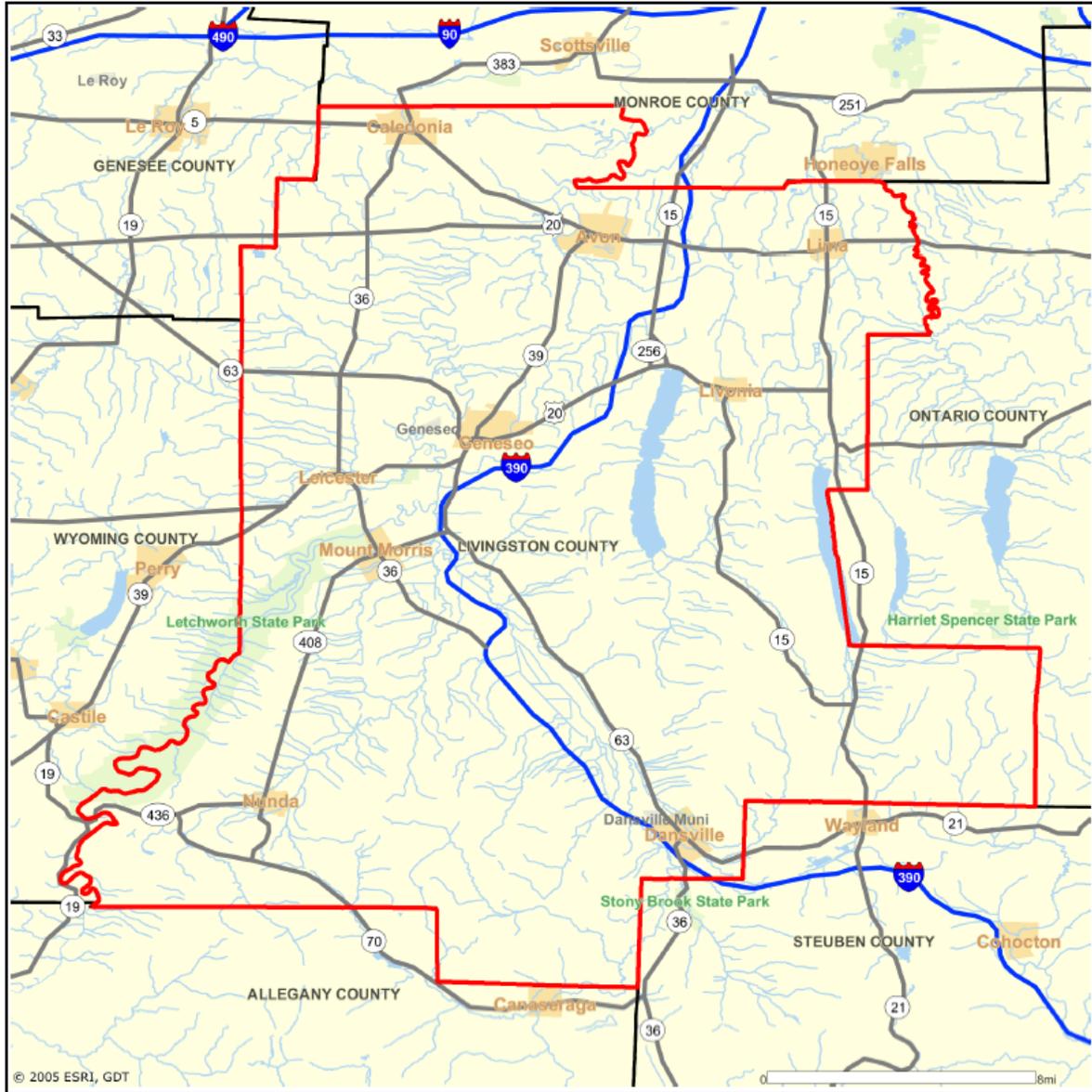
Secondary Market Area: Regional Counties within a 40-mile radius of Livingston County (See Map 2)

Demographic Market Area: Rochester Metropolitan Statistical Area (See Map 3)

Specifically, the data gathered using the above outlined market areas consists of demographic data, market profiles, agricultural production data, and general economic data.

Map1: Livingston County - Primary Market Area

Prepared by ACDS, LLC
May 18, 2005



County: 36051 Livingston County, NY



Map 2: 20-Mile Counties – Secondary Market Area

Prepared by ACDS, LLC
May 18, 2005



Counties: 36003 Allegany County, NY,
36037 Genesee County, NY, et. al.



SWOT Analysis

Introduction

SWOT analysis is a tool used by strategic planners and marketers to assess the competitive environment of a region, industry, business, or product. It is a very simple technique that focuses on the Strengths, Weaknesses, Opportunities, and Threats (SWOT) facing Livingston County agriculture by asking the following questions:

1. What are the advantages of engaging in production agriculture in Livingston County?
2. What unique local conditions support the agricultural industry?
3. What do Livingston County farmers do well?
4. What do Livingston County farmers do poorly?
5. What can be improved in Livingston County agriculture?
6. What are key regional/industrial trends?
7. What are the options and obstacles facing Livingston County farmers?
8. How does Livingston County agriculture fit within the regional context?

For the Livingston County Agricultural Economic Development Strategy, the strengths, weakness, opportunities, and threats were assessed for the agricultural industry overall to include production agriculture as well as agricultural support industries. The SWOT criteria identified are drawn directly from the study team's interviews with the agricultural industry within the County. As such, this analysis should be considered an industry self-assessment.

Table B.1: SWOT Analysis Matrix

INTERNAL FACTORS	
Strengths	Weaknesses
Agricultural Industry Clustering	Regulation/Policy – County & Town
Support Infrastructure	Impermanence Syndrome
Natural Resource Base	Leadership Development
Market Access	Integration with General Economy
Transportation Corridors	Understanding of Land-use Issues
Workforce Composition	Source of Next Generation Farmers
Low Development Pressure	High Carrying Cost of Land
Industry Cooperation and Integration	Inter- & Intra- Agency/Industry Coordination
Land Tenure and Ownership	Grower Disenfranchisement
Entrepreneurship and Innovation	Unbalanced Development Pressure
Private Land Conservation Initiatives	Low Investment Rates
EXTERNAL FACTORS	
Opportunities	Threats
New Market Development (Regional/Energy)	Development Patterns/Pressure (sprawl w/o growth)
Business Retention, Expansion, Attraction Planning	Regional Competitiveness
Regionalism	International Trade
Value-Added Products and Services	Limited Capital Investment
Regional Project Development Support	Market Concentration

High Fuel Prices	Competitiveness of Agricultural Infrastructure
Food Safety and Homeland Security Concerns	Labor Availability/Labor Regulations
	State & County Fiscal Conditions
	Federal Regulations and Policy

Strengths

Overall, the strength of Livingston County agriculture is driven by a series of positive factors such as its strong dairy, vegetable, and cash grain sectors, good transportation infrastructure, and supportive communities. These factors are summarized below.

Agricultural Industry Clustering – Livingston County, and indeed the broader region, have clearly defined clustering around key agricultural sectors such as dairy, vegetables, and field crops. These industries are economically strong and competitive on a regional and national level. They also support relatively strong input and output sectors that leverages there community level impacts by providing upstream and downstream jobs and tax base. As the industry base grows and changes, so will the opportunities to build additional cluster strength.

Support Infrastructure – The support industry built around the agricultural industry continues to be strong both locally and regionally. This infrastructure has recently been strengthened with the addition of CRC in Caledonia, which significantly alters the competitiveness of local input markets.

Natural Resource Base – Livingston County is gifted with high quality soils, favorable climate, and abundant water supplies. These factors combined with low residential and commercial growth pressure provide opportunity for continued expansion of agriculture and related industries.

Market Access – Within a 200 mile radius, there is a population base of nearly 13 million consumers spending nearly \$36.5 billion on food. Of this, \$22 billion is spent on food at home with another 15.5 spent on food away from home. Notable facts about this population are that it tends to be poor (below nation per capita income by \$2,385), ethnically homogenous (91% white versus 75% for the nation), and has lower per household spending than the nation (88% of the national average.) Expanding the market to 750 miles would include nearly 50% of the nation's consumers and significantly expand the diversity of the market. The Northeast alone accounts for nearly 54 million consumers who are ethnically diverse (75% white, 11% Hispanic, 11% Black and 5% Asian) and generally high food spenders at 114% of the national average (\$193 billion in food expenditures annually)

Transportation Corridors – Livingston County is well served by highway and rail transportation corridors that provide local businesses solid market access. Interstate 390 is the defining transportation feature. It roughly bisects the County on its north-south axis and is the only north-south interstate in western New York. Directly to the north and south, I-390 connects the New York Thruway, the major east-west Interstate serving New York State, and State Route 17, future Interstate 86, another heavily traveled commercial corridor. I-390 is generally considered an important trucking access point to Canada.

In addition to its high quality interstate access, the County also supports the type of rail infrastructure that is most commonly found in major metropolitan markets. To date the County is served by two short-line railroads that run on a north-south axis and serve many of the Towns and industrial centers. These short lines connect with, or are proximate to, no fewer than four Class I railroads, all of which are located within the County. These include Norfolk Southern, CSX, Canadian National, and Canadian Pacific.

The presence of competitive trucking and rail rates keeps transportation costs and freight options open for both agriculture and related businesses. It also represents an infrastructure that is not easily replicated.

Workforce Composition – Like much of rural New York, the local workforce is geared toward production sector jobs with nearly 4% dedicated to agriculture and another 15% dedicated to production and transportation jobs. This bodes well for the expansion of agriculture, since these are the job classes from which the base of employees will be drawn, if agriculture and support industries expand.

Low Development Pressure - Agriculture's best soils are generally located in the northern portion of the County where development pressure is the highest. However, this pressure has not reached a level where farms are unable to compete for the highest quality and most productive soils, as is the case in much of Monroe County. However, this situation must be closely monitored over time.

Industry Cooperation and Integration – The agricultural industry in both Livingston County and Western New York is becoming more integrated over time. This is occurring between sectors and business operations and is accompanied by a high degree of cooperation and coordination. This type of cooperation provides a springboard for regional development planning.

Land Tenure and Ownership – Farmland ownership nationwide has seen a steady transition from operator ownership to non-operator ownership. Livingston County is running counter to this trend. Since the 1997 Census of Agriculture, full owner/operators have increased from 63% of farms to 70% of County farms indicating a consolidation of farmer ownership. Similarly, the average age of a local farmers has held steady at 54 between the 1997 and 2002 Census, bucking a regional trend toward aging of the farm population.

Entrepreneurship and Innovation – Throughout New York, Livingston, Wyoming, and Genesee Counties have a reputation for supporting farm based entrepreneurship and innovation. This tendency toward entrepreneurship was reinforced during the interview process and warrants further exploration and support as a driven of economic opportunity at both the business and community level.

Private Land Conservation Initiatives – While Livingston County does not have any publicly supported land conservation programs, it does have a significant number of protected agricultural and nonagricultural parcels along the Genesee River Valley. These parcels total over 7,500 acres and are held by the Genesee Valley Conservancy, a group that is actively engaged in securing a contiguous block of agricultural and environmental easements between the Towns of Genesee

and Avon. While not entirely devoted to securing prime agricultural lands, the Conservancy has been able to protect large contiguous blocks of Prime and Productive soils.

The Conservancy provides a model for conservation programs in Western New York. However, it relies entirely on easement donations to secure properties, which limits its ability to effectively target conservation lands. The Conservancy, though would be willing to explore methods to expand its programs through collaborative partnership with other private and public sector partners.

Weaknesses

As with any industry, region, or product, Livingston County agriculture has weak elements that must be addressed while planning for the industry's economic future.

Regulation/Policy – County & Town - Local regulatory structures throughout Livingston County can be generally described as supportive of agriculture. However, stated “pro-ag” policies are often confusing and in some cases counter productive. This situation is driven by a fundamental lack of understanding of the needs of the agricultural industry as well as a limited understanding by public officials of the tool kit for agricultural economic development and agricultural land use planning. A further complicating factor is that the application of current regulations, despite the pro- agriculture rhetoric, can have a negative impact on agriculture. A prime example is the development of the CRC project in Caledonia, which, despite the projects potential positive impact on agriculture, took unnecessary years in the development pipeline. The reputation generated by such high profile cases, has caused agriculturally related business seeking relocation to skip western New York in favor of other areas.

Understanding of Land-Use Issues - Closely related to the above, the project team found a fundamental lack of understanding about land use issues and how they impact agriculture. These issues ranged from misunderstanding about the impact of zoned residential density on agriculture at the public officials level to a very poor understanding of Purchase of Development Rights programs among farmers and policy makers. These misunderstandings seem in part due to a lack of understanding of the underlying issues as well as poor communication. In some areas this is contributing to growing tension between farmers, landowners, and government.

Impermanence Syndrome - Economists and industrial psychologists recognize a condition called impermanence syndrome. Simply stated, this syndrome indicates that as industries and individuals, when they believe that their status is declining and that this decline is beyond their control, will not make the necessary investment in their businesses and may not employ best management practices. The end result is a self-fulfilling prophesy of industry decline. Many of Livingston County's mid-sized and small farmers, specifically in dairy and agronomic crops demonstrate elements of impermanence syndrome. This assertion is made not on specific interview results, but on the sheer number of interview turndowns and the reasons given for turndown.

Leadership Development - Leading agriculture through long-term economic development planning will require the development of leadership, both current and future. At this time, Livingston County agriculture, as well as regional agriculture, have a clear set of market leaders. However, this leadership is saddled with very high expectations and wears many hats. In order to mover forward, new leaders must be developed to relieve some of this burden, or forward progress in long-term development will be challenged.

Integration with General Economy – Agriculture in Livingston County has not made a strong case for targeted economic development and cluster support, despite representing nearly 4% of the workforce and contributing significantly to the production capacity of the County. Until this case is made, the ability to build wealth, jobs, and tax base on the already strong agriculture base will be weak.

Source of Next Generation Farmers - Proactive economic development and land use planning for agriculture relies on an understanding of the intentions of the next generation of agricultural producers. In Livingston County, part of the picture is clear. Consolidating operations seem to have a much better concept of their future and what the next generation will need. Small and mid-sized farms, however, have a more difficult time defining who the next generation will be and defining their needs. Many see the farm transitioning to a non-farm use.

High Carrying Cost of Land – The high carrying cost of agricultural land in New York is a hotly debated topic among academics and policy makers, but remains a constant source of concern among farmland owners who feel that they bear an unequal fiscal burden. The issue is exasperated by the cyclical nature of agricultural markets and the often low returns of commodity markets. Whether or not the farmers are making a profit, their primary tax burden is driven by their land holdings.

Inter- & Intra- Agency/Industry Coordination – Successful implementation of an Agriculture and Farmland Protection Plan takes a highly coordinated, interagency approach with many agencies ultimately responsible for portions of the plan. Some of these agencies will not have had a traditional role in agriculture industry support and will need to be integrated into the process over time in a way that is practical and within that agency’s mission. Active political support at the county and town level support may be necessary to ensure that the necessary agencies have sufficient goal congruence to accomplish this.

Grower Disenfranchisement – Closely related to the above, the agricultural industry must be fully and dynamically involved in the implementation of the Agriculture and Farmland Protection Plan for it to have long-term effects. Because of this, farmers and agribusinesses must be well represented in the multitude of organizations that impact the successful implementation of the plan at the town, county, and regional levels. Currently, growers, at an individual level and industry level, are disenfranchised from some of these organizations and processes. This phenomenon is driven by mostly by omission and lack of an overarching strategy.

Unbalanced Development Pressure – It seems well understood that development pressures in the County are unbalanced with the northern and eastern portions of the County receiving the highest pressures. Other areas of the county face different land use pressures, making a countywide approach to land conservation challenging. Simply put, what works for some towns, will not work for others.

Low Investment Rates – Coincident with Impermanence Syndrome is low rates of investment in agriculture and related industries. At the production level, this is most noticeable in small and mid-sized firms for reasons previously discussed. At the infrastructure level, this manifests itself in outdated infrastructure such as cleaning and bagging facilities in the dry bean market and old and inefficient milling operations. This type of dis-investment often gives the impression that agriculture is in an irreversible decline, and in the case of Livingston County belies the underlying strength of the agricultural industry.

Opportunities

The long-term success of the industry is dependent upon its ability to recognize the opportunities presented by changes in the business environment whether they are driven by local, regional or global forces. The opportunities facing most of Livingston County's active agricultural operations are driven by regional market and human resource development considerations as noted below.

New Market Development – New markets for agricultural products and production processes are presenting new possibilities for crops and livestock on a regular basis. Key trends leading new market development include advances in biotechnology, bio-refining, food engineering, and energy. As these new market developments continue to unfold, it will be important to have the flexibility in land-use and economic development policies to embrace those that are regionally viable. By example, to successfully embrace the bio-refining of green crop residues, it may be necessary to amend land-use regulations to accommodate on-farm refining capacity.

Maintaining solid relationships with the agriculture and technology sectors is a necessary precursor to successfully capture these opportunities.

Business Retention, Expansion, Attraction Planning – Few communities in the region, or indeed the United States, do an adequate job of actively retaining, expanding, or attracting agricultural and related businesses. Given Livingston County's strong transportation system, access to key eastern markets, a relatively strong agricultural sector, it is in a good position to target such activity. The end result should enhance both input and output infrastructure, making Livingston County a recognized agribusiness center in the Northeast.

Regionalism - Western New York has excellent potential to build upon its agriculture industry by aggregating its resources and targeting high probability opportunities. Agricultural industry sectors are already well integrated across county lines and are increasingly integrating across commodity lines. The next logical step to foster this regional growth is to create a public-private partnership between growth-oriented agricultural sectors and economic development officials to leverage additional growth. Models such as the Golden Capital Network in California and the newly created Hudson Valley Agriculture Development Corporation provide useful models.

Value-Added Products and Services – Markets are constantly changing and demanding greater value-added in products and services. These changes are driven by the market's need to simplify processes and increase efficiency. Assisting farmers and agribusinesses in developing products, procedures and services that enhance market access such as speculative development of flexible manufacturing platforms, may enhance the competitiveness of local agriculture.

Regional Project Development Support – The regional industrial real estate market lacks a significant speculative development partner. The public sector in other regions, such as Pennsylvania, have stepped into this role to create agriculture related business parks with pad ready, pre-approved development sites. Because Western New York lacks such a partnership and because of its reputation as a difficult place to do business, these opportunities are being lost to regional competitors.

High Fuel Prices – High fuel prices are a double-edged sword for agriculture because they increase the cost of doing business. However, agriculture in western New York may stand to benefit due to its market proximity and lower transportation costs. In addition, higher fuel costs are driving advances in alternative energy, many of which may provide alternative income sources to farmers through wind turbine easements, methane production, and ethanol refining.

Food Safety and Homeland Security Concerns – Food safety and homeland security issues continue to be hot button issues in the food industry even though little progress has been made to adapt the food system to the perceived threats. Based on interviews with major institutional food buyers, however, it is clear that fundamental changes to the distribution system, driven by process and technology adaptations, will be forthcoming at some level. The opportunity present is to work with institutional buyers to adapt local systems, from farm through processing/distribution, to enhance chain of custody controls and in-line food safety monitoring.

Threats

Threats represent those elements of the business environment that offer the greatest challenges to long-term survival of the agricultural industry. Many threats are beyond the control of the industry and frequently require additional resources.

Development Patterns/Pressure (sprawl w/o growth) – Unlike many areas in the Northeast, Livingston County and the surrounding area are undergoing very modest growth. However, this does not mean that the land base is not being pressured. In fact, the growth that is occurring is more land consumptive than in previous decades, consisting primarily of large lot single-family residences. This has the practical effect of fracturing the land base and dispersing ownership. To the extent that this type of development takes place on agricultural lands, it may effectively change the land's use from agriculture to some other use or have one of the following impacts.

The first impact comes from the nature of conflicting land uses. Agriculture, despite providing a pleasant and pastoral landscape, is a commercial and industrial land use that produces dust, odors, slow moving traffic, and other conditions that conflict with residential use. There are true economic costs associated with managing farm operations, especially livestock operations, in close proximity to rural residences. In addition to the direct costs associated with operational changes, there are additional social costs to this conflict that include neighbor infighting, nuisance suits, and crop damage.

The second impact from current land development pressure comes from the patchwork of development. As developed parcels leapfrog existing farms, they limit the expansion capability of existing operations while impacting successful intergenerational transfers. In addition, the patchwork of farms requires farmers to travel greater distances between parcels increasing both the time and expense of farming.

The third issue involves the quality of land resources being consumed by development. To put it simply, the best soils and topography for farming are the easiest lands to develop and generally the first to convert. This increases the proportion of marginal soils under cultivation and has the potential to limit the efficiency of county farms.

The fourth issue affected by land use patterns centers on the increase in land value. As a result of increased demand for land, farmers are sometimes forced to compete for land at higher prices than farm economics can comfortably support. This impacts both operational costs as well as farm transition pressures.

Regional Competitiveness - Vis-à-vis other regions of New York and the Northeast, Livingston County provides a very competitive production environment. However, the agricultural products produced in Livingston County and indeed all of New York are commodities that must compete in World markets. In this regard, Livingston County has certain disadvantages such as the high cost of doing business in the area which is driven by relatively high land values, taxes, labor costs, and diminishing competitiveness of local input and output markets. This has the effect of forcing out marginal operations and accelerating the adoption of innovation and industry consolidation.

International Trade – Livingston County farms, especially in the dairy and vegetable sectors, are experience significantly higher international trade pressure. This change has milk selling as components rather than fluid which can largely be sourced anywhere in the world and makes fresh vegetable available year-round reducing demand for locally processed and preserved vegetables. This pressure is expected to increase based on current WTO negotiations that will eliminate agricultural subsidies providing for freer trade of goods and services.

Limited Capital Investment - In order for an industry to remain competitive, the industry must make capital investments in plant and equipment. Current economic conditions, combined with issues of impermanence, are slowing the rate at which these investments are being made especially on mid-size and small farms. This sends the signal that farms are planning to exit agricultural production over time and is indeed a national problem.

Market Concentration – Agricultural industries in all sectors have been consolidating under concentrated ownership. These changes, while occurring to some degree at the production level, are most prominent in post-harvest handling and processing. This concentration of market power is increasingly blamed for depressing markets and creating other unfavorable conditions for growers.

Competitiveness of Agricultural Infrastructure – To some extent, the region’s agricultural infrastructure has been in decline for years, a condition fostered by the poor financial conditions at Agway which reduced investment in local infrastructure. At the same time, farmers began to use more “just-in-time” inventory methods and relied on common carriers to deliver supplies from lowest cost providers around the Country, opening regional suppliers to more national level competition.

Labor Availability/Labor Regulations - Labor is a fundamental production input for most regional agricultural industry sectors such dairy, fruit, vegetable, nursery, greenhouse, and equine. Though labor is not currently in short supply, many agree that any significant recovery in the regional economy is likely to pull labor from the agricultural industry and reallocate it to higher paying jobs in other sectors. In addition to labor availability, skilled and entry-level management positions are also limited by quality with some farmers advertising outside of the region to find qualified employees. As the labor pool gets tighter, it will become more important for farmers to have access to adequate training opportunities and retention strategies.

A potential complication to improving labor conditions are proposed federal policies that would place greater punitive remedies on farmers and other businesses that knowingly or unknowingly employ undocumented labor. Included in the proposed legislation are other conditions that would raise the costs of immigrant labor compliance.

State & County Fiscal Conditions - Poor fiscal conditions will impact the development of local and regional agricultural development initiatives. Many government officials are currently considering cuts to existing programs, a condition that will likely be in place for the next 2 to 3 fiscal cycles. In this environment, new initiatives must demonstrate a clear linkage to overarching economic development goals such as increasing tax base or employment in order to be given serious consideration.

Federal Regulations and Policy – In addition to the aforementioned proposed changes to immigrant labor regulations, there may be significant changes to federal program funding in both commodity and conservation programs. These changes would be based, in part, on federal fiscal conditions.

Introduction

This appendix is intended to introduce the reader to the demographic profile of Livingston County and the surrounding market areas as defined in Appendix A. The project team hopes to illustrate trends within market areas as well as relationships among the market areas such as population rates, neighborhood profiles, employment characteristics, workforce characteristics, and the differentials in consumer spending patterns that can influence development planning. Included in this data are the results of the 2000 U.S. population census as well as 2004 and 2009 ESRI factor projections.

Data for this appendix was purchased on behalf of the Livingston County. This data was selected because it offers reliable projection methodologies available and is comparable across multiple jurisdictions. Other, demographic data such as that provided by the U.S. Census Bureau, is available, but does not offer the same predictive power. Due to the proprietary nature of this data, it is intended for the internal use of the County only.

Highlights

Following are highlights of Livingston County's demographic data.

- Livingston County's growth rate of 0.64% is nearly double the 40-mile market as well as the Rochester DMA.
- Housing unit growth is modestly outpacing regional growth, but home value increases are not keeping pace.
- Income growth is not keeping pace with regional and national averages.
- Livingston County's population is older and aging faster than the comparison regions, however, the median age remains close to the US average and the labor force aged population is expected to remain relatively constant through 2009.
- Livingston County and the region lag national averages in median household value, median household income, and per capita income.
- Based on Consumer Expenditure data Livingston County has one of the lowest consumer expenditure rates in the region indicating a lower cost of living.
- Livingston County has a very low diversity index and low Hispanic population vis-à-vis regional and national averages.
- Educational attainment levels in Livingston County exhibit high attainment between the secondary and associate degree level, but low attainment beyond.
- Livingston's high commuter rate has longest average commute at 25.3 minutes.
- Livingston's workforce is oriented toward blue-collar (26%) jobs with nearly 3% reporting agriculture related jobs and 9% manufacturing related employment.
- Approximately 36% of the available workforce is not employed (6% is unemployed) which is higher than the regional average.
- Approximately 87% of the housing stock was constructed before 1990 with a median construction date of 1960.
- Low food consumption expenditures (84% of national average and 90% of regional average).



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA	
	2000 Total Population	64,328	1,152,342	1,018,281
	2000 Group Quarters	6,749	48,042	39,271
	2004 Total Population	65,968	1,167,415	1,033,892
	2009 Total Population	68,108	1,186,988	1,054,004
	2004 - 2009 Annual Rate	0.64%	0.33%	0.39%
	2000 Households	22,150	441,788	390,969
	2000 Average Household Size	2.6	2.5	2.5
	2004 Households	22,975	453,089	401,690
	2004 Average Household Size	2.58	2.47	2.48
	2009 Households	24,008	466,248	414,269
	2009 Average Household Size	2.56	2.44	2.45
	2004 - 2009 Annual Rate	0.88%	0.57%	0.62%
	2000 Families	15,346	291,116	257,529
	2000 Average Family Size	3.05	3.07	3.07
	2004 Families	15,826	296,752	263,015
	2004 Average Family Size	3.02	3.04	3.04
	2009 Families	16,453	303,570	269,687
	2009 Average Family Size	3	3.01	3.02
	2004 - 2009 Annual Rate	0.78%	0.46%	0.5%
	2000 Housing Units	24,023	482,825	421,889
	Owner Occupied Housing Units	68.7%	62.4%	62.9%
	Renter Occupied Housing Units	23.5%	29.1%	29.8%
	Vacant Housing Units	7.8%	8.5%	7.3%
	2004 Housing Units	24,884	496,265	434,111
	Owner Occupied Housing Units	68.5%	62.5%	63.0%
	Renter Occupied Housing Units	23.9%	28.8%	29.5%
	Vacant Housing Units	7.7%	8.7%	7.5%
	2009 Housing Units	25,953	511,695	448,342
	Owner Occupied Housing Units	69.1%	62.9%	63.5%
	Renter Occupied Housing Units	23.4%	28.2%	28.9%
	Vacant Housing Units	7.5%	8.9%	7.6%
	Median Household Income			
	2000	\$42,191	\$42,585	\$44,312
	2004	\$46,279	\$47,342	\$49,466
	2009	\$51,535	\$54,134	\$56,794
	Median Home Value			
	2000	\$86,325	\$90,262	\$94,812
	2004	\$113,641	\$124,217	\$126,822
	2009	\$142,089	\$159,652	\$162,292
	Per Capita Income			
	2000	\$18,062	\$21,271	\$21,919
	2004	\$21,070	\$24,872	\$25,659
	2009	\$24,450	\$30,124	\$31,110
	Median Age			
	2000	35.3	36.4	36.3
	2004	36.0	37.5	37.4
	2009	36.8	38.8	38.7

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004 and 2009.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA
	2000 Households by Income		
Household Income Base	22,149	442,191	391,387
< \$15,000	13.3%	14.9%	14.4%
\$15,000 - \$24,999	14.0%	13.2%	12.6%
\$25,000 - \$34,999	12.9%	12.7%	12.3%
\$35,000 - \$49,999	18.9%	17.0%	16.5%
\$50,000 - \$74,999	23.0%	20.3%	20.7%
\$75,000 - \$99,999	10.8%	10.9%	11.7%
\$100,000 - \$149,999	5.5%	7.5%	8.1%
\$150,000 - \$199,999	0.9%	1.8%	1.9%
\$200,000 +	0.9%	1.7%	1.8%
Average Household Income	\$50,010	\$54,434	\$56,128
	2004 Households by Income		
Household Income Base	22,973	453,085	401,686
< \$15,000	11.6%	13.1%	12.6%
\$15,000 - \$24,999	12.8%	11.9%	11.2%
\$25,000 - \$34,999	11.4%	11.2%	10.8%
\$35,000 - \$49,999	18.5%	16.4%	15.9%
\$50,000 - \$74,999	22.9%	20.1%	20.4%
\$75,000 - \$99,999	12.1%	12.2%	13.0%
\$100,000 - \$149,999	8.1%	10.0%	10.7%
\$150,000 - \$199,999	1.5%	2.7%	2.9%
\$200,000 +	1.2%	2.4%	2.5%
Average Household Income	\$56,473	\$62,631	\$64,703
	2009 Households by Income		
Household Income Base	24,006	466,244	414,265
< \$15,000	9.9%	11.1%	10.6%
\$15,000 - \$24,999	11.5%	10.5%	9.9%
\$25,000 - \$34,999	9.8%	9.5%	9.1%
\$35,000 - \$49,999	16.9%	14.8%	14.2%
\$50,000 - \$74,999	22.0%	19.3%	19.4%
\$75,000 - \$99,999	14.7%	14.0%	14.7%
\$100,000 - \$149,999	10.5%	12.4%	13.2%
\$150,000 - \$199,999	2.5%	4.4%	4.7%
\$200,000 +	2.1%	4.0%	4.2%
Average Household Income	\$65,110	\$75,131	\$77,717
	2000 Owner Occupied HUs by Value		
Total	16,509	301,151	265,244
< \$50,000	16.3%	12.7%	9.2%
\$50,000 - \$99,999	50.5%	47.3%	46.5%
\$100,000 - \$149,999	22.4%	24.0%	26.5%
\$150,000 - \$199,999	6.0%	9.0%	9.9%
\$200,000 - \$299,999	3.6%	5.0%	5.5%
\$300,000 - \$499,999	0.7%	1.6%	1.8%
\$500,000 - \$999,999	0.4%	0.5%	0.5%
\$1,000,000+	0.0%	0.1%	0.1%
Average Home Value	\$96,635	\$107,544	\$113,328
	2000 Specified Renter Occupied HUs by Contract Rent		
Total	5,439	138,650	124,377
With Cash Rent	92.1%	96.4%	97.0%
No Cash Rent	7.9%	3.6%	3.0%
Median Rent	\$438	\$499	\$516
Average Rent	\$441	\$509	\$526

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied HUs exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004 and 2009.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA
2000 Population by Age			
 Total	64,328	1,152,342	1,018,281
0 - 4	5.4%	6.2%	6.3%
5 - 9	6.4%	7.3%	7.4%
10 - 14	7.1%	7.6%	7.6%
15 - 24	18.6%	13.9%	13.7%
25 - 34	12.0%	12.8%	12.9%
35 - 44	16.9%	16.2%	16.3%
45 - 54	13.9%	14.1%	14.1%
55 - 64	8.3%	8.8%	8.8%
65 - 74	6.1%	6.6%	6.4%
75 - 84	3.9%	4.9%	4.7%
85+	1.4%	1.8%	1.8%
18+	76.6%	74.6%	74.4%
2004 Population by Age			
Total	65,968	1,167,415	1,033,892
0 - 4	5.5%	6.1%	6.3%
5 - 9	5.6%	6.4%	6.5%
10 - 14	6.6%	7.3%	7.4%
15 - 24	19.6%	15.0%	14.9%
25 - 34	11.4%	11.6%	11.6%
35 - 44	15.4%	15.1%	15.2%
45 - 54	14.9%	14.8%	14.8%
55 - 64	9.7%	10.4%	10.3%
65 - 74	6.0%	6.5%	6.3%
75 - 84	3.8%	4.8%	4.7%
85+	1.5%	2.0%	2.0%
18+	78.0%	75.8%	75.5%
2009 Population by Age			
Total	68,108	1,186,988	1,054,004
0 - 4	5.4%	6.1%	6.2%
5 - 9	5.0%	5.7%	5.8%
10 - 14	6.0%	6.7%	6.8%
15 - 24	19.8%	15.8%	15.7%
25 - 34	11.6%	11.3%	11.2%
35 - 44	13.3%	13.2%	13.3%
45 - 54	15.8%	15.4%	15.5%
55 - 64	11.5%	12.1%	12.1%
65 - 74	6.2%	6.8%	6.7%
75 - 84	3.8%	4.6%	4.5%
85+	1.6%	2.3%	2.3%
18+	79.3%	77.1%	76.7%
2000 Population by Sex			
Males	50.2%	48.8%	48.5%
Females	49.8%	51.2%	51.5%
2004 Population by Sex			
Males	50.2%	48.9%	48.6%
Females	49.8%	51.1%	51.4%
2009 Population by Sex			
Males	50.2%	48.9%	48.6%
Females	49.8%	51.1%	51.4%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004 and 2009.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA	
2000 Population by Race/Ethnicity				
	Total	64,328	1,152,342	1,018,281
	White Alone	94.0%	84.9%	83.5%
	Black Alone	3.0%	9.6%	10.6%
	American Indian Alone	0.3%	0.3%	0.3%
	Asian or Pacific Islander Alone	0.8%	1.8%	2.0%
	Some Other Race Alone	0.8%	1.8%	2.0%
	Two or More Races	1.0%	1.6%	1.7%
	Hispanic Origin	2.3%	4.0%	4.4%
	Diversity Index	15.4	32.6	35.2
2004 Population by Race/Ethnicity				
	Total	65,968	1,167,415	1,033,892
	White Alone	93.1%	83.1%	81.5%
	Black Alone	3.3%	10.4%	11.5%
	American Indian Alone	0.3%	0.3%	0.3%
	Asian or Pacific Islander Alone	1.0%	2.2%	2.4%
	Some Other Race Alone	1.0%	2.1%	2.3%
	Two or More Races	1.2%	1.9%	2.0%
	Hispanic Origin	2.7%	4.7%	5.2%
	Diversity Index	17.8	36.1	38.9
2009 Population by Race/Ethnicity				
	Total	68,108	1,186,988	1,054,004
	White Alone	91.9%	80.8%	79.1%
	Black Alone	3.7%	11.3%	12.5%
	American Indian Alone	0.3%	0.3%	0.3%
	Asian or Pacific Islander Alone	1.3%	2.8%	3.0%
	Some Other Race Alone	1.2%	2.5%	2.7%
	Two or More Races	1.5%	2.3%	2.4%
	Hispanic Origin	3.4%	5.7%	6.3%
	Diversity Index	20.9	40.5	43.4
2000 Population 3+ by School Enrollment				
	Total	62,214	1,111,110	981,015
	Enrolled in Nursery/Preschool	1.2%	1.7%	1.7%
	Enrolled in Kindergarten	0.9%	1.4%	1.4%
	Enrolled in Grade 1-8	12.1%	12.9%	13.0%
	Enrolled in Grade 9-12	6.2%	6.1%	6.1%
	Enrolled in College	10.4%	6.2%	6.2%
	Enrolled in Grad/Prof School	0.6%	1.3%	1.3%
	Not Enrolled in School	68.6%	70.5%	70.3%
2000 Population 25+ by Educational Attainment				
	Total	40,081	749,999	662,022
	Less than 9th Grade	4.4%	4.4%	4.4%
	9th - 12th Grade, No Diploma	13.2%	11.3%	11.0%
	High School Graduate	33.8%	29.7%	28.3%
	Some College, No Degree	19.0%	17.8%	18.1%
	Associate Degree	10.3%	10.1%	10.0%
	Bachelor's Degree	11.4%	15.7%	16.7%
	Master's/Prof/Doctorate Degree	7.9%	11.0%	11.5%

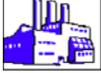
Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004 and 2009.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA	
2000 Population 15+ by Sex and Marital Status				
	Total	52,180	909,753	801,134
	Females	50.0%	51.9%	52.2%
	Never Married	14.2%	13.5%	13.9%
	Married, not Separated	25.2%	26.1%	26.1%
	Married, Separated	1.4%	1.5%	1.6%
	Widowed	4.7%	5.6%	5.5%
	Divorced	4.5%	5.1%	5.2%
	Males	50.0%	48.1%	47.8%
	Never Married	17.4%	15.2%	15.1%
	Married, not Separated	25.9%	26.5%	26.4%
	Married, Separated	1.5%	1.2%	1.2%
	Widowed	1.2%	1.3%	1.3%
	Divorced	4.0%	3.9%	3.8%
2000 Population 16+ by Employment Status				
	Total	51,247	893,310	786,652
	In Labor Force	63.5%	65.2%	66.1%
	Civilian Employed	59.6%	61.3%	62.3%
	Civilian Unemployed	3.9%	3.9%	3.8%
	In Armed Forces	0.0%	0.1%	0.0%
	Not in Labor Force	36.5%	34.8%	33.9%
	2004 Civilian Population 16+ in Labor Force			
	Civilian Employed	94.0%	93.1%	93.4%
	Civilian Unemployed	6.0%	6.9%	6.6%
	2009 Civilian Population 16+ in Labor Force			
	Civilian Employed	94.0%	93.3%	93.6%
	Civilian Unemployed	6.0%	6.7%	6.4%
2000 Females 16+ by Employment Status and Age of Children				
	Total	25,622	463,849	411,527
	Own Children < 6 Only	5.8%	6.8%	6.9%
	Employed/in Armed Forces	3.9%	4.4%	4.5%
	Unemployed	0.3%	0.3%	0.3%
	Not in Labor Force	1.6%	2.0%	2.1%
	Own Children <6 and 6-17	4.7%	5.7%	5.8%
	Employed/in Armed Forces	3.0%	3.6%	3.7%
	Unemployed	0.2%	0.2%	0.2%
	Not in Labor Force	1.5%	1.9%	1.9%
	Own Children 6-17 Only	18.1%	17.6%	17.7%
	Employed/in Armed Forces	14.9%	13.8%	13.9%
	Unemployed	0.3%	0.4%	0.4%
	Not in Labor Force	2.9%	3.4%	3.4%
	No Own Children <18	71.4%	69.9%	69.6%
	Employed/in Armed Forces	37.3%	35.3%	35.9%
	Unemployed	2.3%	2.1%	2.1%
	Not in Labor Force	31.9%	32.5%	31.7%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004 and 2009.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA	
2004 Employed Population 16+ by Industry				
	Total	30,252	547,319	491,598
	Agriculture/Mining	3.0%	1.4%	1.0%
	Construction	6.9%	4.5%	4.4%
	Manufacturing	14.0%	17.6%	18.0%
	Wholesale Trade	3.0%	3.0%	3.1%
	Retail Trade	12.1%	11.3%	11.5%
	Transportation/Utilities	4.6%	3.6%	3.5%
	Information	2.3%	2.6%	2.6%
	Finance/Insurance/Real Estate	2.9%	4.3%	4.6%
	Services	47.7%	48.7%	48.9%
	Public Administration	3.4%	2.9%	2.6%
2004 Employed Population 16+ by Occupation				
	Total	30,252	547,319	491,598
	White Collar	56.6%	62.3%	63.5%
	Management/Business/Financial	10.8%	12.5%	12.8%
	Professional	22.4%	25.7%	26.2%
	Sales	10.2%	10.5%	10.8%
	Administrative Support	13.2%	13.6%	13.8%
	Services	16.8%	16.0%	15.5%
	Blue Collar	26.6%	21.8%	21.0%
	Farming/Forestry/Fishing	0.9%	0.5%	0.3%
	Construction/Extraction	5.7%	3.8%	3.5%
	Installation/Maintenance/Repair	4.3%	3.4%	3.3%
	Production	9.1%	8.9%	8.9%
	Transportation/Material Moving	6.5%	5.2%	5.0%
2000 Workers 16+ by Means of Transportation to Work				
	Total	29,772	536,387	480,450
	Drove Alone - Car, Truck, or Van	77.8%	80.9%	81.5%
	Carpooled - Car, Truck, or Van	11.4%	9.3%	9.0%
	Public Transportation	0.4%	2.0%	2.1%
	Walked	6.5%	4.0%	3.7%
	Other Means	0.4%	0.7%	0.7%
	Worked at Home	3.5%	3.1%	3.0%
2000 Workers 16+ by Travel Time to Work				
	Total	29,772	536,387	480,450
	Did not Work at Home	96.5%	96.9%	97.0%
	Less than 5 minutes	7.2%	4.4%	3.8%
	5 to 9 minutes	13.0%	12.6%	11.8%
	10 to 19 minutes	21.5%	34.0%	34.3%
	20 to 24 minutes	10.1%	17.1%	17.9%
	25 to 34 minutes	18.5%	16.7%	17.4%
	35 to 44 minutes	10.4%	4.4%	4.6%
	45 to 59 minutes	9.9%	4.1%	3.9%
	60 to 89 minutes	4.2%	2.3%	2.2%
	90 or more minutes	1.7%	1.4%	1.2%
	Worked at Home	3.5%	3.1%	3.0%
	Average Travel Time to Work (in min)	25.3	20.9	20.9
2000 Households by Vehicles Available				
	Total	22,150	441,788	390,969
	None	5.7%	10.1%	10.2%
	1	31.0%	35.3%	35.0%
	2	44.0%	40.3%	40.2%
	3	14.1%	10.7%	10.9%
	4	3.9%	2.7%	2.7%
	5+	1.3%	0.9%	0.9%
	Average Number of Vehicles Available	1.8	1.6	1.6

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2004.



Prepared by ACDS, LLC

Market Profile

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA	
2000 Households by Type				
	Total	22,150	441,788	390,969
	Family Households	69.3%	65.9%	65.9%
	Married-couple Family	54.8%	49.9%	49.6%
	With Related Children	25.6%	23.1%	23.1%
	Other Family (No Spouse)	14.4%	16.0%	16.2%
	With Related Children	9.9%	11.0%	11.2%
	Nonfamily Households	30.7%	34.1%	34.1%
	Householder Living Alone	23.1%	27.4%	27.3%
	Householder Not Living Alone	7.6%	6.7%	6.9%
	Households with Related Children	35.6%	34.0%	34.3%
	Households with Persons 65+	22.9%	23.8%	23.3%
2000 Households by Size				
	Total	22,150	441,788	390,969
	1 Person Household	23.1%	27.4%	27.3%
	2 Person Household	34.0%	33.0%	32.9%
	3 Person Household	17.4%	15.9%	16.0%
	4 Person Household	16.0%	14.4%	14.5%
	5 Person Household	6.5%	6.3%	6.3%
	6 Person Household	2.1%	2.0%	2.0%
	7+ Person Household	1.0%	1.0%	1.0%
2000 Households by Year Householder Moved In				
	Total	22,150	441,788	390,969
	Moved in 1999 to March 2000	15.3%	17.6%	17.9%
	Moved in 1995 to 1998	23.9%	25.3%	25.9%
	Moved in 1990 to 1994	15.8%	16.0%	16.1%
	Moved in 1980 to 1989	20.5%	18.0%	18.1%
	Moved in 1970 to 1979	11.5%	10.9%	10.6%
	Moved in 1969 or Earlier	13.0%	12.2%	11.4%
	Median Year Householder Moved In	1992	1993	1993
2000 Housing Units by Units in Structure				
	Total	24,023	482,825	421,889
	1, Detached	69.5%	64.2%	64.4%
	1, Attached	1.0%	3.9%	4.4%
	2	5.6%	7.7%	7.3%
	3 or 4	5.1%	6.1%	6.3%
	5 to 9	3.9%	5.9%	6.4%
	10 to 19	1.5%	2.3%	2.4%
	20+	1.7%	4.8%	5.2%
	Mobile Home	11.5%	5.0%	3.5%
	Other	0.1%	0.2%	0.0%
2000 Housing Units by Year Structure Built				
	Total	24,023	482,825	421,889
	1999 to March 2000	1.5%	1.2%	1.3%
	1995 to 1998	5.1%	3.6%	3.7%
	1990 to 1994	6.2%	4.9%	4.9%
	1980 to 1989	13.5%	10.1%	10.5%
	1970 to 1979	13.4%	15.0%	15.0%
	1969 or Earlier	60.3%	65.2%	64.6%
	Median Year Structure Built	1960	1959	1960

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.



Market Profile

Prepared by ACDS, LLC

	Livingston County, NY	Secondary Market Area	Tertiary Market Area Rochester, MSA
Top 3 Tapestry Segments			
1.	Salt of the Earth	Rustbelt Traditions	Cozy and Comfortable
2.	Midlife Junction	Cozy and Comfortable	Rustbelt Traditions
3.	Midland Crowd	Salt of the Earth	Rustbelt Retirees



2004 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Apparel & Services: Total \$	\$51,317,806	\$1,142,707,369	\$1,050,956,729
Average Spent	\$2,233.64	\$2,522.04	\$2,616.34
Spending Potential Index	82	93	96
Computers & Accessories: Total \$	\$5,110,856	\$113,271,636	\$104,633,234
Average Spent	\$222.45	\$250.00	\$260.48
Spending Potential Index	82	92	96
Education: Total \$	\$20,055,863	\$451,075,185	\$417,772,532
Average Spent	\$872.94	\$995.56	\$1,040.04
Spending Potential Index	84	95	100
Entertainment/Recreation: Total \$	\$59,361,234	\$1,284,253,183	\$1,174,001,823
Average Spent	\$2,583.73	\$2,834.44	\$2,922.66
Spending Potential Index	84	93	96
Food at Home: Total \$	\$90,275,129	\$1,958,980,680	\$1,783,602,241
Average Spent	\$3,929.28	\$4,323.61	\$4,440.25
Spending Potential Index	84	93	95
Food Away from Home: Total \$	\$59,824,527	\$1,311,358,735	\$1,202,490,890
Average Spent	\$2,603.90	\$2,894.26	\$2,993.58
Spending Potential Index	84	93	96
Health Care: Total \$	\$70,188,773	\$1,466,746,186	\$1,317,600,058
Average Spent	\$3,055.01	\$3,237.21	\$3,280.14
Spending Potential Index	89	95	96
HH Furnishings & Equipment: Total \$	\$39,482,918	\$866,483,547	\$796,652,461
Average Spent	\$1,718.52	\$1,912.39	\$1,983.25
Spending Potential Index	82	92	95
Investments: Total \$	\$122,722,316	\$3,333,692,061	\$3,169,195,652
Average Spent	\$5,341.56	\$7,357.70	\$7,889.66
Spending Potential Index	65	90	96
Retail Goods: Total \$	\$486,190,159	\$10,346,191,373	\$9,405,955,757
Average Spent	\$21,161.70	\$22,834.79	\$23,415.96
Spending Potential Index	86	93	95
Shelter: Total \$	\$244,079,904	\$5,573,816,560	\$5,157,543,609
Average Spent	\$10,623.72	\$12,301.81	\$12,839.61
Spending Potential Index	79	91	95
TV/Video/Sound Equipment: Total \$	\$19,654,561	\$427,922,854	\$391,072,948
Average Spent	\$855.48	\$944.46	\$973.57
Spending Potential Index	84	93	96
Travel: Total \$	\$33,564,939	\$748,020,461	\$688,231,908
Average Spent	\$1,460.93	\$1,650.93	\$1,713.34
Spending Potential Index	82	93	96
Vehicle Maintenance & Repairs: Total \$	\$19,619,010	\$422,812,998	\$385,916,652
Average Spent	\$853.93	\$933.18	\$960.73
Spending Potential Index	84	92	94

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Expenditure data are derived from the 2000, 2001 and 2002 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI BIS forecasts for 2004 and 2009.

Implications for the Livingston County Agriculture and Farmland Protection Plan

Livingston County is best described as a slowly growing rural county with its greatest external demographic influences driven by its proximity to Rochester. Like Rochester, Livingston's key demographic indicators such as population growth, employment characteristics, measures of wealth and income, homeownership, and consumer expenditures like the region's are best described as lethargic relative to State and national averages. While the above factors show some growth, the County does not seem under significant growth pressure or undergoing any radical shift in demographic composition.

Despite the relative apparent stability, a closer examination of the data at a local level indicates that the entire County is not developing under the same conditions. The highest growth rates in the County are focused in the northeastern portions of the County, whereas the southern and western portions of the County demonstrate very little change in housing stock, population growth, wealth, homeownership, and other demographic features. Because of the above-mentioned uneven pressures, the impact on agriculture in terms of conversion pressure is felt more strongly in the northeastern portions of the County with easy access to the Rochester area.

Several demographic and market factors are significant:

- Growth is slow and not, in most places in the County, a significant threat to farmland transition.
- Rise in commuter rates highlights the growing bond between the northeastern towns and the Rochester area.
- Housing values, while increasing, are lagging regional and national averages, indicating that the real estate market is not "over-heated".
- The employment base is geared toward blue-collar professions such as manufacturing which may offer a competitive advantage in attracting food-manufacturing companies.
- The projected consistency in household and family make-up and size indicates relative stability in the food market. These same trends, however, will likely keep food purchases at the low end of the market.
- Slow growth in high-income households and ethnic diversity do not indicate strong opportunity for specialty retail and direct marketing opportunities.
- Lagging household and per capita income, indicate that Livingston's households may have less disposable income for non-essential foods items.
- The County is made up of sub-markets with specific characteristics that impact agricultural development opportunity.

Overall, demographic and market research indicates that growth pressure threatens a discrete area in the County that is defined by its commuting distance to the Rochester area. Outside of this area, the economic development challenges for agriculture focus on developing a more competitive industrial base that suits workforce conditions.

Introduction

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

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

Highlights

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

Table D.1: Summary Consumer Expenditure Data			
Expenditure Type	Livingston County	40-Mile Market	Rochester Market
Percent of Household Income			
Food			
Food At Home	14.12%	15.25%	15.03%
<i>Bakery and Cereal Prod.</i>	8.49%	9.13%	8.98%
<i>Meat, Poultry, Seafood, Eggs</i>	1.26%	1.37%	1.34%
<i>Dairy Products</i>	2.26%	2.43%	2.39%
<i>Fruits and Vegetables</i>	0.93%	0.99%	0.97%
<i>Snacks and Other Foods</i>	1.45%	1.59%	1.57%
Food Away From Home	2.59%	2.75%	2.70%
Apparel			
All Apparel	4.83%	5.33%	5.29%
Transportation			
Vehicle Purchase (Net)	10.48%	10.70%	10.44%
Fuel, Maint., Repair	5.30%	5.52%	5.40%
Home			
Mortgage Pymts & Basics	13.80%	15.11%	15.08%
Maintenance & Remodel Svcs.	2.72%	2.98%	2.96%
Maint. & Remodel Matrl.	0.62%	0.63%	0.62%
Utilities, Fuel, Pub. Svcs.	7.65%	8.13%	7.97%
Percent of National Average			
Food	84%	93%	96%
Food At Home	84%	93%	95%
<i>Bakery and Cereal Prod.</i>	84%	93%	95%
<i>Meat, Poultry, Seafood, Eggs</i>	84%	92%	95%
<i>Dairy Products</i>	85%	93%	95%
<i>Fruits and Vegetables</i>	82%	92%	95%
<i>Snacks and Other Foods</i>	85%	93%	95%
Food Away From Home	84%	93%	96%



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

County: 36051 Livingston County, NY

Top Tapestry Segments:		Demographic Summary	2004	2009
Salt of the Earth	17.0%	Population	65,968	68,108
Midlife Junction	14.0%	Households	22,975	24,008
Midland Crowd	11.2%	Families	15,826	16,453
Green Acres	11.1%	Median Age	36.0	36.8
Rustbelt Traditions	9.6%	Median Household Income	\$46,279	\$51,535

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	82	\$2,233.64	\$51,317,806
Men's	84	\$429.76	\$9,873,622
Women's	82	\$733.07	\$16,842,175
Children's	84	\$358.81	\$8,243,682
Footwear	80	\$396.37	\$9,106,643
Watches & Jewelry	82	\$202.26	\$4,646,842
Apparel Products and Services (1)	79	\$113.38	\$2,604,842
Computer			
Computers and Hardware for Home Use	82	\$198.77	\$4,566,639
Software and Accessories for Home Use	82	\$23.69	\$544,217
Entertainment & Recreation	84	\$2,583.73	\$59,361,234
Fees and Admissions	79	\$470.03	\$10,799,041
Membership Fees for Clubs (2)	82	\$131.99	\$3,032,543
Fees for Participant Sports, excl. Trips	80	\$90.60	\$2,081,647
Admission to Movie/Theatre/Opera/Ballet	77	\$110.59	\$2,540,765
Admission to Sporting Events, excl. Trips	81	\$44.74	\$1,027,922
Fees for Recreational Lessons	77	\$92.11	\$2,116,164
TV/Video/Sound Equipment	84	\$855.48	\$19,654,561
Community Antenna or Cable Television	86	\$467.38	\$10,738,035
Color Televisions	82	\$91.76	\$2,108,204
VCRs, Video Cameras, and DVD Players	81	\$30.21	\$694,134
Video Cassettes and DVDs	83	\$33.57	\$771,180
Video Game Hardware and Software	83	\$27.77	\$638,067
Satellite Dishes	86	\$2.51	\$57,684
Rental of Video Cassettes and DVDs	82	\$50.97	\$1,171,103
Sound Equipment (3)	84	\$146.31	\$3,361,554
Rental and Repair of TV/Sound Equipment	83	\$4.99	\$114,600
Pets	88	\$303.12	\$6,964,079
Toys and Games	83	\$165.46	\$3,801,557
Recreational Vehicles and Fees (4)	94	\$310.99	\$7,144,984
Sports/Recreation/Exercise Equipment (5)	82	\$178.45	\$4,099,855
Photo Equipment and Supplies (6)	84	\$119.08	\$2,735,801
Reading (7)	83	\$181.13	\$4,161,356
Food	84	\$6,533.17	\$150,099,656
Food at Home	84	\$3,929.28	\$90,275,129
Bakery and Cereal Products	84	\$585.34	\$13,448,122
Meat, Poultry, Fish, and Eggs	84	\$1,044.91	\$24,006,788
Dairy Products	85	\$428.59	\$9,846,932
Fruit and Vegetables	82	\$672.44	\$15,449,209
Snacks and Other Food at Home (8)	85	\$1,198.00	\$27,524,078
Food Away from Home	84	\$2,603.90	\$59,824,527
Alcoholic Beverages	82	\$410.00	\$9,419,755
Nonalcoholic Beverages at Home	86	\$334.50	\$7,685,126



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

County: 36051 Livingston County, NY

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	65	\$5,341.56	\$122,722,316
Vehicle Loans	89	\$4,763.67	\$109,445,217
Health			
Nonprescription Drugs	88	\$86.31	\$1,982,883
Prescription Drugs	94	\$497.22	\$11,423,690
Eyeglasses and Contact Lenses	87	\$73.22	\$1,682,137
Home			
Mortgage Payment and Basics (9)	81	\$6,385.94	\$146,716,989
Maintenance and Remodeling Services	81	\$1,257.92	\$28,900,631
Maintenance and Remodeling Materials (10)	90	\$286.59	\$6,584,494
Utilities, Fuel, and Public Services	87	\$3,540.63	\$81,346,065
Household Furnishings and Equipment			
Household Textiles (11)	82	\$101.48	\$2,331,593
Furniture	80	\$478.18	\$10,986,162
Floor Coverings	81	\$62.55	\$1,437,099
Major Appliances (12)	84	\$226.17	\$5,196,146
Housewares (13)	83	\$78.45	\$1,802,304
Small Appliances	85	\$29.36	\$674,636
Luggage	78	\$8.17	\$187,782
Telephones and Accessories	83	\$42.01	\$965,190
Household Operations			
Child Care	78	\$323.16	\$7,424,691
Lawn and Garden (14)	89	\$366.15	\$8,412,226
Moving/Storage/Freight Express	77	\$38.33	\$880,526
Housekeeping Supplies (15)	86	\$568.61	\$13,063,833
Insurance			
Owners and Renters Insurance	90	\$366.17	\$8,412,846
Vehicle Insurance	85	\$1,087.10	\$24,976,056
Life/Other Insurance	88	\$552.65	\$12,697,084
Health Insurance	90	\$1,487.89	\$34,184,172
Personal Care Products (16)	84	\$335.38	\$7,705,424
School Books and Supplies (17)	89	\$98.59	\$2,265,076
Smoking Products	92	\$446.09	\$10,248,932
Transportation			
Vehicle Purchases (Net Outlay) (18)	89	\$4,849.11	\$111,408,394
Gasoline and Motor Oil	88	\$1,599.11	\$36,739,614
Vehicle Maintenance and Repairs	84	\$853.93	\$19,619,010
Travel			
Airline Fares	78	\$311.42	\$7,154,793
Lodging on Trips	83	\$326.23	\$7,495,184
Auto/Truck/Van Rental on Trips	77	\$37.39	\$859,047
Food and Drink on Trips	83	\$368.75	\$8,471,954

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

Source: Expenditure data are derived from the 2000, 2001, 2002 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI BIS forecasts for 2004 and 2009.

40-Mile Market Area Consumer Expenditures

Retail Goods and Services
Expenditures

Prepared by ACDS, LLC

Counties: 36003 Allegany County, NY, 36037 Genesee County, NY, et. al.

Top Tapestry Segments:		Demographic Summary	2004	2009
Rustbelt Traditions	8.1%	Population	1,167,415	1,186,988
Cozy and Comfortable	8.0%	Households	453,089	466,248
Salt of the Earth	6.5%	Families	296,752	303,570
Rustbelt Retirees	6.4%	Median Age	37.5	38.8
Great Expectations	5.8%	Median Household Income	\$47,342	\$54,134

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	93	\$2,522.04	\$1,142,707,369
Men's	93	\$479.77	\$217,376,335
Women's	94	\$838.36	\$379,851,744
Children's	92	\$394.46	\$178,727,733
Footwear	91	\$450.32	\$204,033,827
Watches & Jewelry	91	\$226.24	\$102,507,519
Apparel Products and Services (1)	93	\$132.89	\$60,210,211
Computer			
Computers and Hardware for Home Use	92	\$223.60	\$101,311,838
Software and Accessories for Home Use	91	\$26.40	\$11,959,798
Entertainment & Recreation	93	\$2,834.44	\$1,284,253,183
Fees and Admissions	93	\$549.77	\$249,095,107
Membership Fees for Clubs (2)	94	\$152.24	\$68,977,072
Fees for Participant Sports, excl. Trips	93	\$104.81	\$47,489,231
Admission to Movie/Theatre/Opera/Ballet	92	\$131.54	\$59,597,943
Admission to Sporting Events, excl. Trips	92	\$50.88	\$23,055,159
Fees for Recreational Lessons	92	\$110.30	\$49,975,702
TV/Video/Sound Equipment	93	\$944.46	\$427,922,854
Community Antenna or Cable Television	95	\$514.08	\$232,925,547
Color Televisions	92	\$103.79	\$47,027,639
VCRs, Video Cameras, and DVD Players	92	\$34.07	\$15,437,901
Video Cassettes and DVDs	91	\$36.82	\$16,681,304
Video Game Hardware and Software	93	\$31.14	\$14,108,291
Satellite Dishes	88	\$2.56	\$1,157,701
Rental of Video Cassettes and DVDs	92	\$56.63	\$25,660,375
Sound Equipment (3)	91	\$159.67	\$72,342,754
Rental and Repair of TV/Sound Equipment	95	\$5.70	\$2,581,342
Pets	92	\$318.32	\$144,226,206
Toys and Games	93	\$185.46	\$84,032,120
Recreational Vehicles and Fees (4)	93	\$306.09	\$138,684,076
Sports/Recreation/Exercise Equipment (5)	88	\$191.00	\$86,541,137
Photo Equipment and Supplies (6)	94	\$132.67	\$60,113,486
Reading (7)	94	\$206.67	\$93,638,197
Food	93	\$7,217.87	\$3,270,339,415
Food at Home	93	\$4,323.61	\$1,958,980,680
Bakery and Cereal Products	93	\$646.78	\$293,050,491
Meat, Poultry, Fish, and Eggs	92	\$1,150.36	\$521,215,804
Dairy Products	93	\$469.23	\$212,604,143
Fruit and Vegetables	92	\$753.55	\$341,423,329
Snacks and Other Food at Home (8)	93	\$1,303.69	\$590,686,913
Food Away from Home	93	\$2,894.26	\$1,311,358,735
Alcoholic Beverages	93	\$468.73	\$212,374,515
Nonalcoholic Beverages at Home	93	\$361.83	\$163,940,354



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

Counties: 36003 Allegany County, NY, 36037 Genesee County, NY, et. al.

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	90	\$7,357.70	\$3,333,692,061
Vehicle Loans	92	\$4,893.64	\$2,217,256,193
Health			
Nonprescription Drugs	95	\$92.95	\$42,115,142
Prescription Drugs	97	\$512.79	\$232,341,467
Eyeglasses and Contact Lenses	95	\$79.65	\$36,087,660
Home			
Mortgage Payment and Basics (9)	91	\$7,151.78	\$3,240,392,553
Maintenance and Remodeling Services	91	\$1,408.59	\$638,218,842
Maintenance and Remodeling Materials (10)	94	\$298.03	\$135,032,631
Utilities, Fuel, and Public Services	94	\$3,848.44	\$1,743,686,875
Household Furnishings and Equipment			
Household Textiles (11)	93	\$114.99	\$52,102,137
Furniture	91	\$543.77	\$246,377,403
Floor Coverings	93	\$71.52	\$32,406,489
Major Appliances (12)	92	\$245.77	\$111,354,461
Housewares (13)	92	\$86.48	\$39,185,297
Small Appliances	93	\$32.32	\$14,644,157
Luggage	92	\$9.63	\$4,364,055
Telephones and Accessories	92	\$46.77	\$21,191,604
Household Operations			
Child Care	91	\$374.88	\$169,855,145
Lawn and Garden (14)	93	\$385.55	\$174,686,394
Moving/Storage/Freight Express	89	\$44.36	\$20,097,313
Housekeeping Supplies (15)	94	\$622.27	\$281,945,471
Insurance			
Owners and Renters Insurance	94	\$383.06	\$173,560,466
Vehicle Insurance	92	\$1,184.32	\$536,601,757
Life/Other Insurance	95	\$593.43	\$268,877,470
Health Insurance	95	\$1,571.06	\$711,831,950
Personal Care Products (16)	93	\$368.94	\$167,161,273
School Books and Supplies (17)	95	\$106.09	\$48,066,958
Smoking Products	96	\$468.97	\$212,484,976
Transportation			
Vehicle Purchases (Net Outlay) (18)	92	\$5,063.71	\$2,294,311,243
Gasoline and Motor Oil	92	\$1,679.54	\$760,980,112
Vehicle Maintenance and Repairs	92	\$933.18	\$422,812,998
Travel			
Airline Fares	92	\$363.83	\$164,849,154
Lodging on Trips	94	\$367.64	\$166,571,859
Auto/Truck/Van Rental on Trips	90	\$44.02	\$19,944,287
Food and Drink on Trips	93	\$412.08	\$186,707,915

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

Source: Expenditure data are derived from the 2000, 2001, 2002 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI BIS forecasts for 2004 and 2009.

Rochester Market Consumer Expenditures



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

MA: 538 Rochester NY

Top Tapestry Segments:		Demographic Summary		
			2004	2009
Cozy and Comfortable	8.5%	Population	1,033,892	1,054,004
Rustbelt Traditions	8.2%	Households	401,690	414,269
Rustbelt Retirees	6.4%	Families	263,015	269,687
Great Expectations	5.1%	Median Age	37.4	38.7
Sophisticated Squires	5.0%	Median Household Income	\$49,466	\$56,794

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	96	\$2,616.34	\$1,050,956,729
Men's	96	\$496.39	\$199,393,668
Women's	98	\$871.32	\$350,001,678
Children's	96	\$407.73	\$163,781,795
Footwear	95	\$467.42	\$187,758,260
Watches & Jewelry	95	\$234.70	\$94,275,197
Apparel Products and Services (1)	97	\$138.78	\$55,746,131
Computer			
Computers and Hardware for Home Use	96	\$233.04	\$93,609,103
Software and Accessories for Home Use	95	\$27.44	\$11,024,131
Entertainment & Recreation	96	\$2,922.66	\$1,174,001,823
Fees and Admissions	97	\$577.63	\$232,026,820
Membership Fees for Clubs (2)	99	\$159.46	\$64,051,646
Fees for Participant Sports, excl. Trips	97	\$110.04	\$44,202,611
Admission to Movie/Theatre/Opera/Ballet	96	\$138.22	\$55,522,209
Admission to Sporting Events, excl. Trips	97	\$53.29	\$21,407,785
Fees for Recreational Lessons	97	\$116.61	\$46,842,569
TV/Video/Sound Equipment	96	\$973.57	\$391,072,948
Community Antenna or Cable Television	97	\$527.18	\$211,764,254
Color Televisions	96	\$108.11	\$43,427,271
VCRs, Video Cameras, and DVD Players	96	\$35.49	\$14,256,539
Video Cassettes and DVDs	95	\$38.12	\$15,313,374
Video Game Hardware and Software	97	\$32.45	\$13,035,964
Satellite Dishes	89	\$2.60	\$1,045,015
Rental of Video Cassettes and DVDs	95	\$58.87	\$23,645,534
Sound Equipment (3)	94	\$164.82	\$66,207,504
Rental and Repair of TV/Sound Equipment	99	\$5.92	\$2,377,493
Pets	94	\$324.66	\$130,414,467
Toys and Games	96	\$191.72	\$77,013,037
Recreational Vehicles and Fees (4)	93	\$306.86	\$123,263,256
Sports/Recreation/Exercise Equipment (5)	91	\$196.44	\$78,909,259
Photo Equipment and Supplies (6)	97	\$137.62	\$55,282,207
Reading (7)	98	\$214.14	\$86,019,829
Food	96	\$7,433.82	\$2,986,093,131
Food at Home	95	\$4,440.25	\$1,783,602,241
Bakery and Cereal Products	95	\$664.78	\$267,035,904
Meat, Poultry, Fish, and Eggs	95	\$1,180.43	\$474,166,994
Dairy Products	95	\$481.22	\$193,299,405
Fruit and Vegetables	95	\$776.24	\$311,809,849
Snacks and Other Food at Home (8)	95	\$1,337.57	\$537,290,089
Food Away from Home	96	\$2,993.58	\$1,202,490,890
Alcoholic Beverages	97	\$487.55	\$195,843,260
Nonalcoholic Beverages at Home	95	\$370.28	\$148,737,188



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

DMA: 538 Rochester NY

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	96	\$7,889.66	\$3,169,195,652
Vehicle Loans	94	\$4,987.20	\$2,003,307,436
Health			
Nonprescription Drugs	97	\$94.65	\$38,020,733
Prescription Drugs	97	\$512.75	\$205,965,338
Eyeglasses and Contact Lenses	97	\$81.72	\$32,827,863
Home			
Mortgage Payment and Basics (9)	95	\$7,459.08	\$2,996,238,547
Maintenance and Remodeling Services	95	\$1,462.92	\$587,639,699
Maintenance and Remodeling Materials (10)	96	\$304.92	\$122,483,358
Utilities, Fuel, and Public Services	96	\$3,943.58	\$1,584,096,489
Household Furnishings and Equipment			
Household Textiles (11)	96	\$119.49	\$47,998,241
Furniture	95	\$567.28	\$227,870,280
Floor Coverings	97	\$74.69	\$30,001,209
Major Appliances (12)	94	\$252.79	\$101,543,623
Housewares (13)	95	\$89.30	\$35,871,647
Small Appliances	96	\$33.27	\$13,363,764
Luggage	97	\$10.14	\$4,073,833
Telephones and Accessories	95	\$48.35	\$19,420,437
Household Operations			
Child Care	96	\$394.84	\$158,603,021
Lawn and Garden (14)	95	\$391.98	\$157,455,420
Moving/Storage/Freight Express	93	\$46.54	\$18,693,591
Housekeeping Supplies (15)	96	\$639.15	\$256,741,048
Insurance			
Owners and Renters Insurance	96	\$390.23	\$156,751,602
Vehicle Insurance	95	\$1,216.35	\$488,594,321
Life/Other Insurance	97	\$607.45	\$244,006,981
Health Insurance	96	\$1,588.93	\$638,258,809
Personal Care Products (16)	96	\$380.49	\$152,838,372
School Books and Supplies (17)	99	\$109.65	\$44,046,792
Smoking Products	98	\$474.72	\$190,691,559
Transportation			
Vehicle Purchases (Net Outlay) (18)	94	\$5,165.96	\$2,075,113,446
Gasoline and Motor Oil	94	\$1,711.30	\$687,412,552
Vehicle Maintenance and Repairs	94	\$960.73	\$385,916,652
Travel			
Airline Fares	96	\$380.43	\$152,816,871
Lodging on Trips	97	\$381.05	\$153,063,639
Auto/Truck/Van Rental on Trips	95	\$46.22	\$18,567,357
Food and Drink on Trips	96	\$426.62	\$171,367,059

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

Source: Expenditure data are derived from the 2000, 2001, 2002 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI BIS forecasts for 2004 and 2009.

Table Definitions



Retail Goods and Services Expenditures

Prepared by ACDS, LLC

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

Implications for a Livingston Agriculture and Farmland Protection Plan

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

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

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

Introduction

This appendix is designed to introduce the reader to the current state of agriculture in Livingston County. If an Agriculture and Farmland Protection Plan is to be successful in Livingston County, then that program must be designed with an eye toward the realities of regional and local agriculture. Specific to this analysis, the project team has focused on both production specifics as well as grower and farmers characteristics.

Generally, the data in this section is drawn from the 2002 U.S. Agricultural Census. Time series comparisons using 2002 Census data were not possible beyond comparisons to the year of 1997 due to changes in the 2002 Census. These changes included wide ranging amendments to Census definitions, such as the definition of a farm, as well as new sampling and adjustment methodologies. Because of this, the data is occasionally supplemented by U.S. Bureau of Economic Analysis (BEA) time series data.

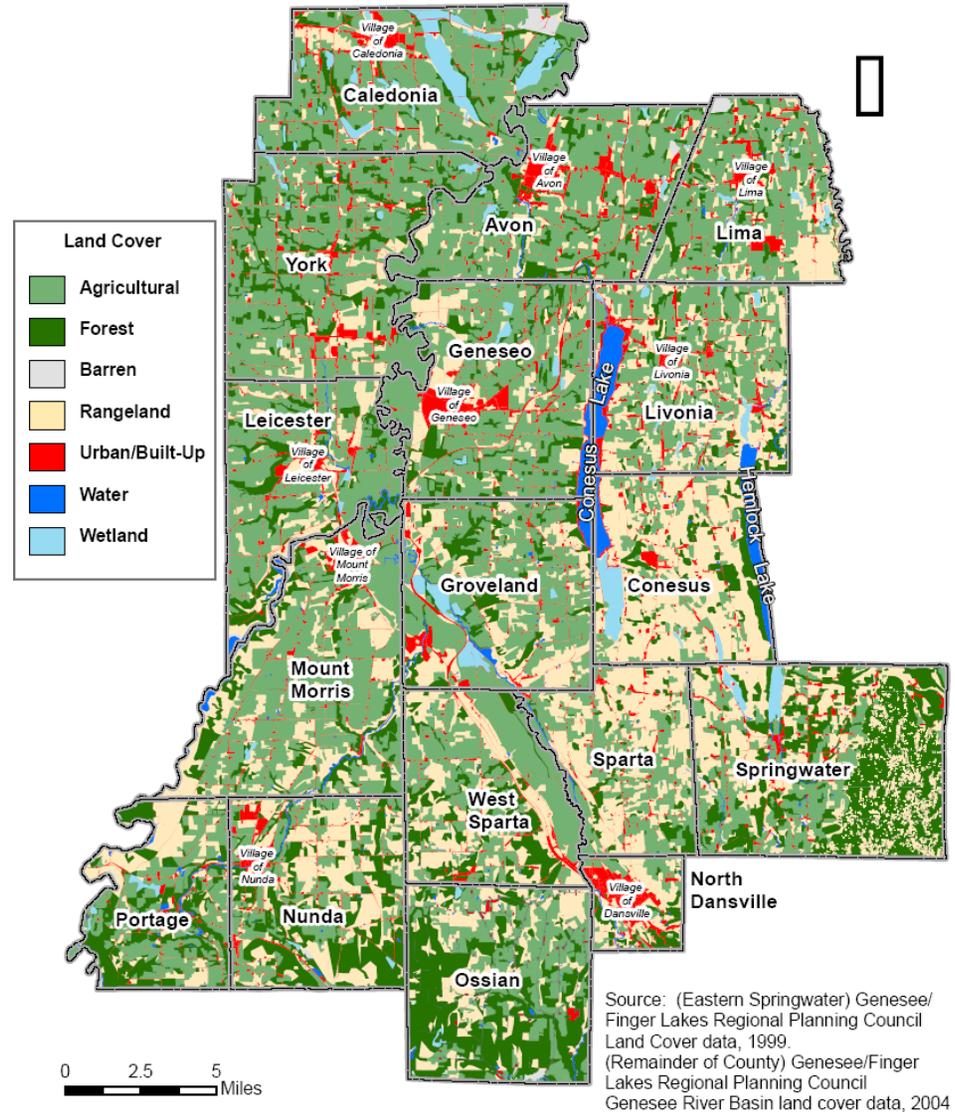
Highlights

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

- Livingston County had 801 farms operating on 209,496 acres in 2002, which was an increase of 51 farms and decrease of 286 acres over 1997.
- Dairy is becoming more concentrated with 10 farms constituting more than 50% of livestock inventory.
- Dairy represents 52% of all marketings.
- Land ownership is becoming more concentrated in the hands of farm operators.
- The average farm operator age has held steady at 54 years of between 1997 and 2002 indicating an improving replacement rate for farmers.
- 60% of Livingston's farms operate with negative cash flow.
- An increasing percentage of farmers report farming as their primary occupation (57%), up 7% over 1997.
- Nearly 30% of farm operators are considered beginning farmers under USDA's definition of 10 or fewer years of experience.
- Livingston relies heavily on the broader region for both agricultural input and output markets.
- Equestrian operations, while not central to the agricultural economy, are an under-reported agricultural sub sector.

Land-Use

Livingston County Land Cover



Map prepared by Livingston County Planning Department: April 2006

Agriculture Highlights

Table E.1: 2002 Agricultural Census Highlights										
	40-mile County Highlights Summary Data					Livingston County Highlights Summary Data				
	2002		1997		Percent Change	2002		1997		Percent Change
	Data	Units	Data	Units		Data	Units	Data	Units	
Farms	6,043	Farms	6,085	Farms	-0.69%	801	Farms	750	Farms	6.80%
Land in Farms	1,456,949	Acres	1,457,859	Acres	-0.06%	209,496	Acres	209,782	Acres	-0.14%
Average Farm Size	241	Acres	240	Acres	0.42%	262	Acres	280	Acres	-6.43%
Estimated Value of Land and Buildings	\$ 1,956,821	(\$1,000's)	\$ 1,633,089	(\$1,000's)	19.82%	\$ 301,111	(\$1,000's)	\$ 240,244	(\$1,000's)	25.34%
Total Cropland	910,411	Acres	1,039,764	Acres	-12.44%	154,705	Acres	162,152	Acres	-4.59%
Harvested Cropland	817,994	Acres	840,278	Acres	-2.65%	125,344	Acres	133,216	Acres	-5.91%
Cropland Used for Pasture	75,372	Acres	103,565	Acres	-27.22%	9,962	Acres	14,963	Acres	-33.42%
Other Cropland	118,752	Acres	95,921	Acres	23.80%	19,399	Acres	13,973	Acres	38.83%
Woodland	255,028	Acres	243,569	Acres	4.70%	28,428	Acres	26,468	Acres	7.41%
Pastured	25,717	Acres	33,173	Acres	-22.48%	3,644	Acres	2,648	Acres	37.61%
Other Woodland	229,311	Acres	210,396	Acres	8.99%	24,784	Acres	23,820	Acres	4.05%
Pastureland and Rangeland	81,395	Acres	69,602	Acres	16.94%	10,873	Acres	7,621	Acres	42.67%
Pastureland	182,484	Acres	206,340	Acres	-11.56%	24,479	Acres	25,232	Acres	-2.98%
Irrigated Land	20,688	Acres				16,519	Acres			
Total Farm Sales	\$ 658,380	(\$1,000's)	\$ 576,004	(\$1,000's)	14.30%	\$ 84,059	(\$1,000's)	\$ 74,900	(\$1,000's)	12.23%
Crops Including Nursery and Greenhouse	226,768	(\$1,000's)	204,027	(\$1,000's)	11.15%	28,851	(\$1,000's)	28,371	(\$1,000's)	1.69%
Livestock and Poultry	431,611	(\$1,000's)	371,974	(\$1,000's)	16.03%	55,207	(\$1,000's)	46,528	(\$1,000's)	18.65%
Direct to Consumer (Human Consumption)	4,696	(\$1,000's)	5,044	(\$1,000's)	-6.90%	158	(\$1,000's)	462	(\$1,000's)	-65.80%
Net Cash Income										
Positive Cashflow	44.08%	Percent of Farms				40.07%	Percent of Farms			
Negative Cashflow	55.87%	Percent of Farms				59.80%	Percent of Farms			
Principal Occupation										
Farming	3,565		3,133		13.79%	447		381		17.32%
Other	2,478		2,952		-16.06%	354		369		-4.07%
Age of Operator										
Under 55	3,315		3,536		-6.25%	454		398		14.07%
55 and Over	2,728		2,549		7.02%	347		352		-1.42%
Gender of Operator										
Male	5,251	Farms	5,461	Farms	-3.85%	684	Farms	662	Farms	3.32%
Female	792	Farms	624	Farms	26.92%	117	Farms	88	Farms	32.95%
Land Tenure										
Full Owner	4,006	Farms	3,766	Farms	6.37%	561	Farms	477	Farms	17.61%
Full Owner	537,270	Acres	488,164	Acres	10.06%	77,909	Acres	69,097	Acres	12.75%
Part Owner	1,812	Farms	1,963	Farms	-7.69%	216	Farms	230	Farms	-6.09%
Part Owner	878,316	Acres	897,513	Acres	-2.14%	121,313	Acres	129,398	Acres	-6.25%
Tenant	225	Farms	356	Farms	-36.80%	24	Farms	43	Farms	-44.19%
Tenant	41,363	Acres	72,182	Acres	-42.70%	10,274	Acres	11,307	Acres	-9.14%
Years on Present Farm										
9 or less	1,404		1,428		-1.68%	235		165		42.42%
10 or more	4,639		3,877		19.65%	566		488		15.98%

Farm Production Trends

Following is a brief discussion of production trends by sector.

Meat, Poultry, and Aquaculture

Dairy and livestock have historically been important to this region. Dairy production remains the key sector directly creating more than 50% of the agricultural output and accounting for more than 50% of the livestock industry. Cyclical but generally higher dairy prices over the last two years have supported economic expansion of the industry, but predictions for dairy pricing indicate a slide in pricing over the next several years.

Table E-2: Livestock Production												
Livestock	40-mile Market						Livingston County					
	2002		1997		Change		2002		1997		Change	
	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory
CATTLES AND CALVES												
COWS AND HEIFERS - BEEF	1,221	15,166	1,148	15,220	6.36%	-0.35%	177	2,011	152	1,967	16.45%	2.24%
COWS AND HEIFERS - DAIRY	1,071	141,300	1,287	136,221	-16.78%	3.73%	95	18,540	104	17,206	-8.65%	7.75%
CATTLE ON FEED	360	12,604	NA	NA			46	2,521	NA	NA		
OTHER CATTLE	2,265	155,154	NA	NA			263	20,988	NA	NA		
DAIRY PRODUCTS	950	\$ 349,218	1,176	\$ 307,909	-19.22%	13.42%	87	\$ 44,656	95	\$ 39,832	-8.42%	12.11%
HOGS AND PIGS (underreported due to disclosure)	213	20,200	264	21,570	-19.32%	-6.35%	30	308	32	377	-6.25%	-18.30%
SHEEP AND LAMBS (underreported due to disclosure)	297	15,819	284	14,367	4.58%	10.11%	53	2,962	54	2,715	-1.85%	9.10%
MEAT GOATS (underreported due to disclosure)	277	3,093					36	554				

Poultry has never been a significant industry sector in the region, yet recent activity indicates that small flocks are growing in number in the meat type poultry sectors.

Table E-3: Poultry Production												
Poultry Type	40-mile Market						Livingston County					
	2002		1997		Change		2002		1997		Change	
	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory	Farms	Inventory
ALL POULTRY	441		489		-9.82%		54		72		-25.00%	
LAYERS* (underreported due to disclosure)	342	3,592	368	3,469	-7.07%	3.55%	44	1,390	57	D	-22.81%	NA
BROILERS AND MEAT TYPE CHICKENS* (underreported due to disclosure)	80	7,075	78	1,893	2.56%	273.75%	7	285	10	188	-30.00%	51.60%
TURKEYS* (underreported due to disclosure)	76	725	72	875	5.56%	-17.14%	8	84	15	137	-46.67%	-38.69%

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

Table E-4: Aquaculture Production		
Aquaculture Type	Farms with Aquaculture Sold	
	40-Mile Market	Livingston County
CATFISH	3	0
TROUT	6	0
OTHER FOOD FISH	4	2
ORNAMENTAL FISH	5	0
SPORT OR GAME FISH	19	5
OTHER AQUACULTURE PRODUCTS	1	0

Nursery and Greenhouse

As a production alternative to more traditional field crops, nursery and greenhouse production has made modest gains in the market area. Exclusive of Christmas Trees, approximately 7% of the County's farms raise nursery and greenhouse products. Regionally, these operations are small producing on average 9 acres of open production and 6,000 square feet under cover. Livingston County nursery and greenhouse operations being even smaller at an average acreage of just over 9 acres and 4,500 square feet under protection. Leading production sectors include floriculture, bedding plants, and nursery stock.

Table E-5: 2002 Greenhouse and Nursery Production

Greenhouse-Nursery Type	40-mile Market			Livingston County		
	Farms	Sq. ft. under glass or protection	Acres in the open	Farms	Sq. ft. under glass or protection	Acres in the open
NURSERY, GREENHOUSE, FLORICULTURE, ETC - TOTAL	321	1,928,914	2999	31	142,040	289
NURSERY, FLORICULTURE, FV SEED CROPS, ETC, IRRIGATED IN THE OPEN	78	-	350	3	0	29
FLORICULTURE CROPS - TOTAL	181	1,572,227	195	19	142,040	12
BEDDING/GARDEN PLANTS	140	1,227,442	44	18	(D)	6
CUT FLOWERS AND CUT FLORIST GREENS	42	(D)	40	3	(D)	6
FOLIAGE PLANTS	10	(D)	0			
POTTED FLOWERING PLANTS	41	215,231	4			
AQUATIC PLANTS	9	-	0	1	0	(D)
FLOWER SEEDS, BULBS, CORMS, RHIZOMES, AND TUBERS - DRY	15	-	0			
GREENHOUSE VEGETABLES	14	150,152	(X)			
NURSERY STOCK	135	30,290	768	13		(D)
SOD HARVESTED	1	(X)	(D)			
VEGETABLE SEEDS	10	-	(D)			
OTHER NURSERY AND GREENHOUSE CROPS	3	-	(D)	1		(D)
CUT CHRISTMAS TREES	315		6271	46		591

Vegetables and Fruits

The processing market dominates open field production of vegetables locally. The result is consolidation within a few vegetable types led by sweet

corn, peas, beets, and chipping potatoes. Within the region there is a larger fresh market deal that includes snap beans, peas, sweet corn, squash, cabbage and dry onions, however, the larger vegetable deal remains closely allied with local processors.

Vegetable (by type)	Table E-6: Vegetable Production							
	40-mile Market				Livingston County			
	Harvested Farms		Harvested Acres		Harvested Farms		Harvested Acres	
	Fresh Market	Processing	Fresh Market	Processing	Fresh Market	Processing	Fresh Market	Processing
VEGETABLES HARVESTED FOR SALE	418	135	61144	35637	55	27	5881	4700
ASPARAGUS	20	1	27	0	7	22	0	0
SNAP BEANS	51	26	13385	9339	2	1	(D)	(D)
BEETS	26	10	642	0	4	4	289	(D)
BROCCOLI	22	0	49	0				
BRUSSELS SPROUTS	1	0	(D)	0				
CHINESE CABBAGE	3	0	(D)	0				
HEAD CABBAGE	51	17	7686	1123				
CANTALOUPS	20	0	25	0				
CARROTS	13	2	855	0	1	0	(D)	0
CAULIFLOWER	12	0	25	0				
CHICORY	1	0	(D)	0				
COLLARDS	2	(D)	0	0	1	(D)	0	0
CUCUMBERS AND PICKLES	29	0	(D)	0				
EGGPLANT	7	0	4	0				
ESCAROLE & ENDIVE	2	0	(D)	0				
GARLIC	22	0	17	0	2	0	(D)	0
HERBS, FRESH CUT	5	0	7	0				
LETTUCE, ALL	13	0	6	0	1	0	(D)	0
LETTUCE, HEAD	7	0	5	0				
LETTUCE, LEAF	5	0	1	0				
LETTUCE, ROMAINE	1	0	(D)	0	1	0	(D)	0
MUSTARD GREENS	2	0	(D)	0				
DRY ONIONS	22	2	780	0	2	0	(D)	0
PEAS, CHINESE (SUGAR & SNOW)	1	0	(D)	0				
PEAS, GREEN (EXCLUDING SOUTHERN)	89	67	12801	10321	18	15	1544	1266
PEPPERS, BELL	63	2	40	0	5	1	(D)	(D)
PEPPERS, CHILE (ALL PEPPERS - EXCL BELL)	23	1	25	0	1	0	(D)	0
PUMPKINS	159	13	574	21	13	0	48	0
RADISHES	3	0	(D)	0				
RHUBARB	10	0	5	0				
SPINACH	7	3	7	0				
SQUASH	116	10	1212	194	7	0	11	0
SWEET CORN	217	71	16883	11872	29	20	2567	2909
TOMATOES	115	3	156	0	11	0	9	0
TURNIPS	4	0	(D)	0				
TURNIP GREENS	1	0	(D)	0				
VEGETABLES, MIXED	6	0	45	0				
VEGETABLES, OTHER	17	0	36	0				
WATERMELONS	1	0	(D)	0				

As is evidenced in the following table, fruit and berry production in the region is varied, and consists mostly of small producers. The influence of the Finger Lakes Region on grape production is also apparent with almost half of the fruit and nut acreage represented by grapes. Livingston County has very little production of any fruits or nuts and production is dominated by small producers. The only notable change to this pattern is the addition of approximately 200 non-bearing apple acres since 1997 indicating the potential for new investment in this industry.

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

Table E.7: Fruit Production								
Fruits, Nuts, and Berries (by type)	40-mile Market				Livingston County			
	Fruit & Nut Farms		Berry Farms		Fruit & Nut Farms		Berry Farms	
	Farms	Bearing Acres	Farms	Harvested Acres	Farms	Bearing Acres	Farms	Harvested Acres
APPLES	129	1,792			21	87		
APRICOTS	9	(D)			2	(D)		
CHERRIES, SWEET	42	35			8	2		
CHERRIES, TART	21	18			9	1		
GRAPES	138	1,892			10	19		
NECTARINES	6	(D)			1	(D)		
PEACHES, ALL	62	162			13	4		
PEARS, ALL	48	6			8	(D)		
PLUMS AND PRUNES	20	(D)			6	(D)		
HAZELNUTS (FILBERTS)	1	(D)						
OTHER FRUITS AND NUTS	8	(D)						
BERRIES, ALL			174	307			8	(D)

Farm Economics

Farm fiscal performance is an area in which Livingston County has not performed as well as the region as a whole. Certainly returns have been more variable and demonstrating a long-term decline in realized net gains lags the region. Over the last twenty years, however, farm proprietors' income has remained positive across the region, yet Livingston County has been unable to post positive proprietors income in three of these years.

Figure E.1: 40-Mile Income and Expenses

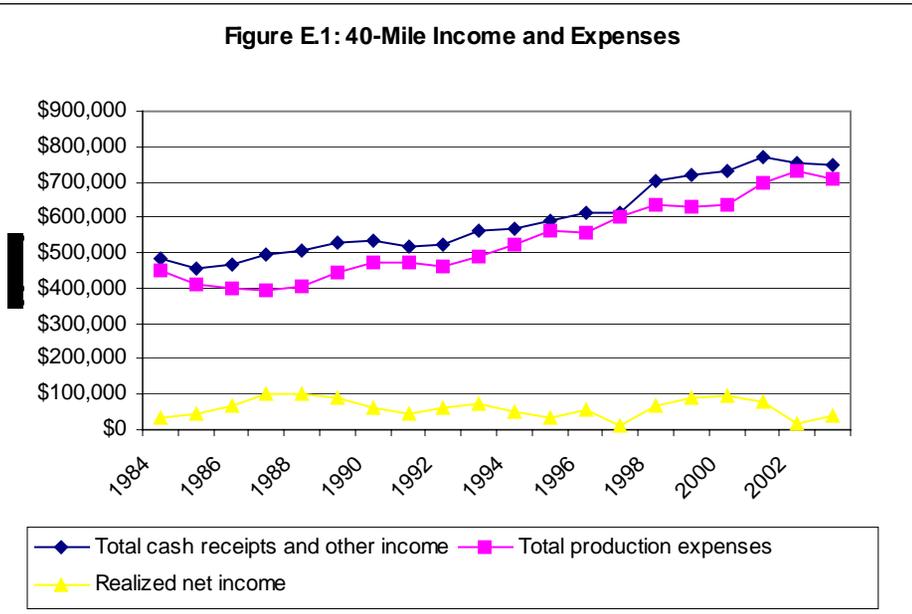
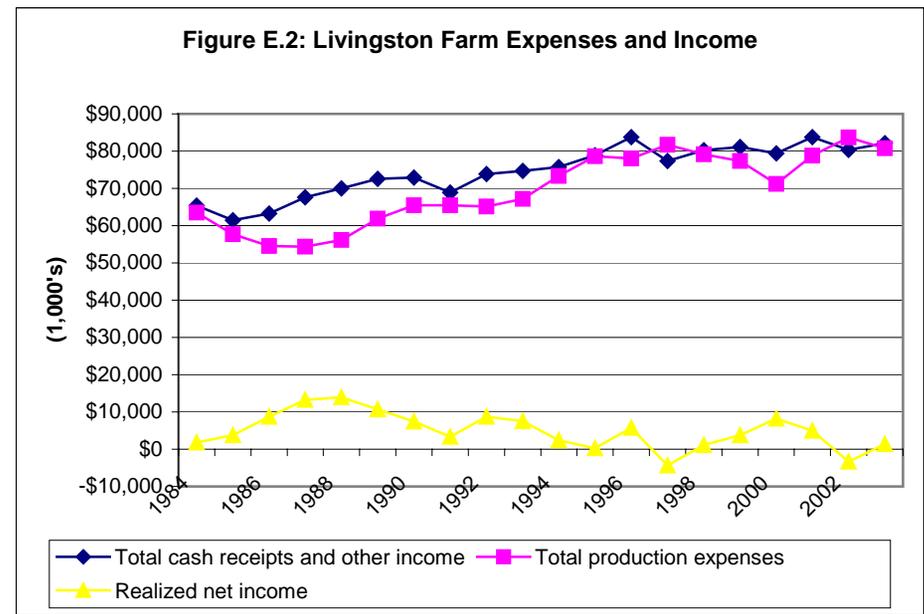
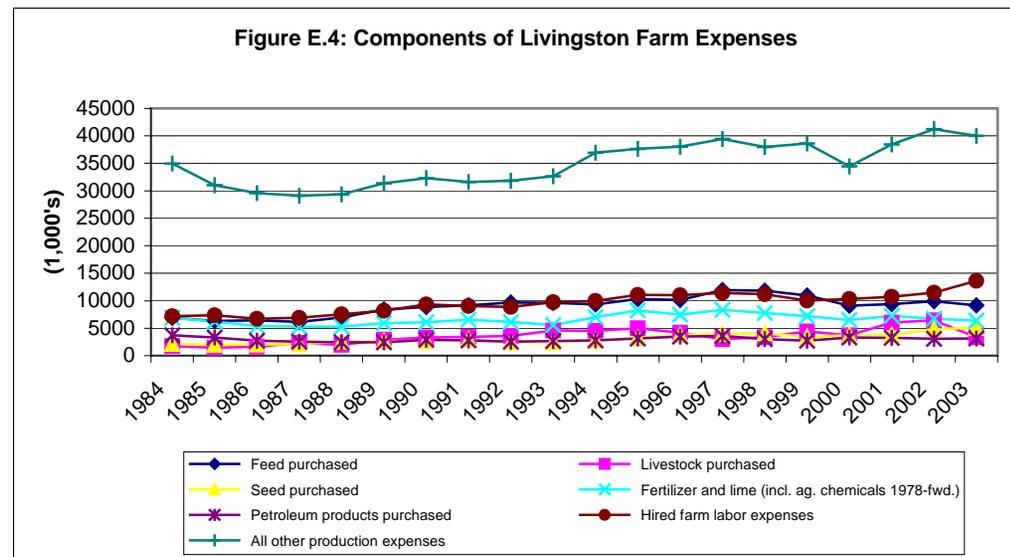
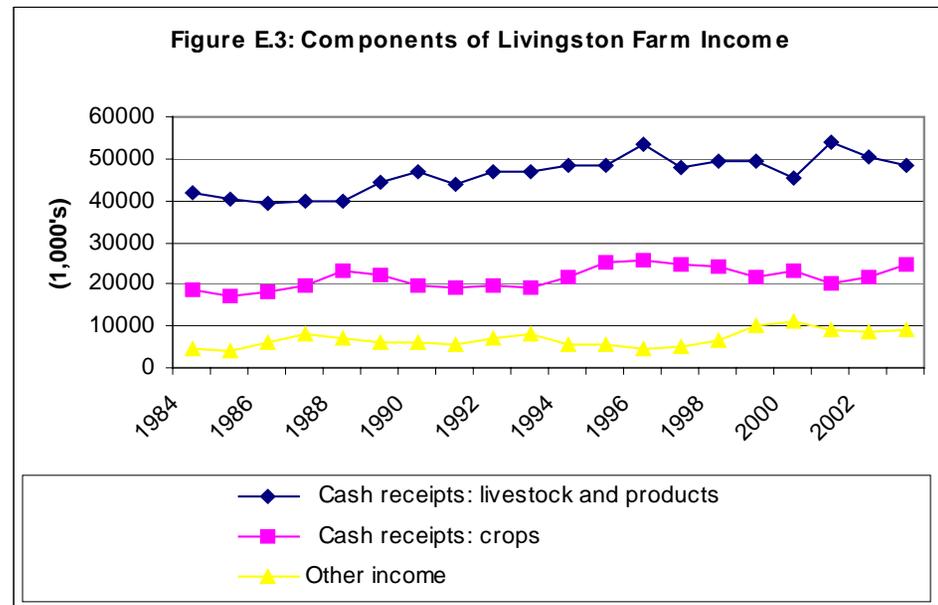


Figure E.2: Livingston Farm Expenses and Income



Looking more discretely at the components of income and expense, Livingston County relies heavily on the stability of its livestock marketing as an anchor for revenue. With nearly 88% of livestock marketings driven by dairy product sales, dairy becomes a cornerstone to the industry, driving other livestock marketings and crop sales. The variability of crop sales on the other hand has been a source of risk and has been declining as a percentage of marketing over time. One of the recent bright spots in revenue has been “Other Income” which includes payments for things such as timber sales and custom work as well as government payments. In Livingston County, the increases in “Other Income” have been driven almost exclusively by increased government payments.

Expenses are driven by “Other Expenses” which includes land rent, depreciation, operations/maintenance, and taxes. While “Other Expenses” are often high, the fact that they represent 50% of total expenses may indicate a combination of factors. Recent dairy consolidation trends that have increased relative expense levels in feed, hired labor, livestock, and other expenses are part of the explanations Other may include the high cost of doing business in Livingston (e.g., high tax rates), that farms are overcapitalized therefore contributing to high than expected depreciation, or that old equipment and infrastructure require high maintenance costs.



Agricultural Support Industries

Agriculture does not exist in a vacuum. It requires both input and output industries to survive; the following analysis uses data from I-Market and Implan to assess the conditions of these support industries.

By and large, Livingston County is well served by at-place service providers. Over the last five-years, the number of local service providers and primary market outlets has remained mostly unchanged though its composition is slightly changed. Most markedly, the loss of manufacturing capacity has been offset by growth in input and service industries. Despite a loss in Jobs, the net result has meant little in terms of market change to farmers. In addition, the strength of regional input and output industries buoys changes in local conditions and provides market balance.

As is noted in Table E.9, the regional support structure, both input and output, demonstrates considerable diversity and strength. Input and marketing options are plentiful and varied, and the demonstrate stability over the last five-years.

Additional detail on the farm support sectors including sales, employment and firm numbers can be found on the following tables.

Note: Tables E.8 and E.9 rely on survey data that is known to be in accurate at the firm level and should be used to assess trends only. This is especially true of sales and employment data.

Table E.8: Livingston County Agricultural Support, Service, and Output Businesses											
Industry	2005			2000			Percent Change				
	Firms	Employees	Sales	Firms	Employees	Sales	Firms	Employees	Sales		
Crop harvesting	1	1	0.1	1	1	0.1	0%	0%	0%		
Crop preparation services for market	2	8	1.3	1	2	0.1	100%	300%	1200%		
Veterinary services for livestock	1	3	0.1	1	3	0.1	0%	0%	0%		
Animal specialty services	6	7	0.6	8	17	0.8	-25%	-59%	-25%		
Timber tracts	2	3	0.2	3	6	0.3	-33%	-50%	-33%		
Forestry services	1	1	0.1	1	1	0.1	0%	0%	0%		
Meat packing plants	1	2	0.2	2	8	0.6	-50%	-75%	-67%		
Dry, condensed and evaporated dairy products	1	1	0.2								
Canned fruits and specialties	1	40		1	40		0%	0%			
Dried and dehydrated fruits, vegetables and soup mixes				1	5		-100%	-100%			
Frozen specialties, nec	1	450		1	375		0%	20%			
Wet corn milling	1	7									
Prepared feeds, nec	1	5	1.4								
Bread, cake, and related products				1	1	0.1	-100%	-100%	-100%		
Wines, brandy, and brandy spirits	2	9	0.7	1	12	0.5	100%	-25%	40%		
Food preparations, nec	1	17	6.2	1	12	3.7	0%	42%	68%		
Logging	5	31	0.5	2	23	0.1	150%	35%	400%		
Sawmills and planing mills, general	2	31	2.2	3	49	1.5	-33%	-37%	47%		
Hardwood dimension and flooring mills	1	15	1.4	1	15	1.4	0%	0%	0%		
Millwork	3	10	0.6	2	8	0.1	50%	25%	500%		
Nitrogenous fertilizers				1	8		-100%	-100%			
Fertilizers, mixing only	2	17	2.1	1	3		100%	467%			
Railroads, line-haul operating	3	30	3	1	15	1.4	200%	100%	114%		
Refrigerated warehousing and storage	1	9	0.4	1	9	0.5	0%	0%	-20%		
Refrigeration equipment and supplies				1	1	0.1	-100%	-100%	-100%		
Farm and garden machinery	2	5	0.4	4	6	0.6	-50%	-17%	-33%		
Groceries, general line	1	18	N/A	1	18	N/A	0%	0%			
Dairy products, except dried or canned	1	20	N/A	3	31	6.1	-67%	-35%			
Meats and meat products	1	2	0.3	2	5	0.2	-50%	-60%	50%		
Groceries and related products, nec	2	21	7.7	1	1	0.1	100%	2000%	7600%		
Grain and field beans	8	35	13	7	44	15.2	14%	-20%	-14%		
Livestock	1	2	0.3								
Farm-product raw materials, nec	1	1	0.1	1	1	0.1	0%	0%	0%		
Farm supplies	5	25	1.3	5	26	15.1	0%	-4%	-91%		
Flowers and florists supplies	2	8	0.5	3	15	1.2	-33%	-47%	-58%		
Grocery stores	28	848	103.1	32	795	66.1	-13%	7%	56%		
Fruit and vegetable markets	3	8	0.5	2	7	0.4	50%	14%	25%		
Dairy products stores	1	7	0.2	1	6	0.2	0%	17%	0%		
Retail bakeries	3	17	0.2	5	18	0.5	-40%	-6%	-60%		
Miscellaneous food stores	5	10	0.4	6	15	0.6	-17%	-33%	-33%		
Eating places	115	1,159	24.1	115	1,159	24.1	0%	0%	0%		
Florists	18	42	1.8	18	42	1.8	0%	0%	0%		

Source: Marketplace 3rd Quarter 2005 and 3rd Quarter 2000

Table E.9: 40-Mile Market Area Counties Agricultural Support, Service, and Output Businesses

Industry	2005			2000			Percent Change		
	Firms	Employees	Sales	Firms	Employees	Sales	Firms	Employees	Sales
Soil preparation services	4	13	2.4	5	10	1.5	-20%	30%	60%
Crop planting and protection	10	58	1.7	10	2,032	121.6	0%	-97%	-99%
Crop harvesting	5	50	4.1	7	22	1	-29%	127%	310%
Crop preparation services for market	9	50	2.2	9	27	1.5	0%	85%	47%
Veterinary services for livestock	7	52	2.2	9	64	2.8	-22%	-19%	-21%
Livestock services, except veterinary	9	27	1.1	12	38	2.2	-25%	-29%	-50%
Forest products	2	4	0.2	2	4	0.2	0%	0%	0%
Meat packing plants	5	32	17.4	9	106	24.4	-44%	-70%	-29%
Sausages and other prepared meats	3	101	16.4	6	95	12.6	-50%	6%	30%
Cheese; natural and processed	3	605	43.6	3	558	37.6	0%	8%	16%
Dry, condensed and evaporated dairy products	4	231	161.7	1	222	145.3	300%	4%	11%
Fluid milk	4	552	64.7	4	550	50	0%	0%	29%
Canned fruits and specialties	12	1,177	1,057.80	14	1,318	3,208.00	-14%	-11%	-67%
Pickles, sauces, and salad dressings	3	22	0.9	3	22	1.2	0%	0%	-25%
Frozen fruits and vegetables	2	232	2	2	220	N/A	0%	5%	N/A
Prepared feeds, nec	5	40	2	5	194	N/A	0%	-79%	N/A
Wines, brandy, and brandy spirits	21	1,974	4,250.60	13	1,914	3,964.00	62%	3%	7%
Food preparations, nec	13	51	8.7	16	64	6.8	-19%	-20%	28%
Farm machinery and equipment	7	199	49.4	11	442	66.1	-36%	-55%	-25%
Food products machinery	8	244	14.1	7	204	3.4	14%	20%	315%
Farm and garden machinery	30	200	32.7	38	165	28.4	-21%	21%	15%
Groceries, general line	40	451	101.8	48	548	106.8	-17%	-18%	-5%
Dairy products, except dried or canned	20	224	25.5	26	280	29.7	-23%	-20%	-14%
Poultry and poultry products	3	13	7.1	7	132	31	-57%	-90%	-77%
Meats and meat products	15	426	543.4	19	442	778.5	-21%	-4%	-30%
Fresh fruits and vegetables	20	393	142	33	267	80.6	-39%	47%	76%
Groceries and related products, nec	61	693	69.1	90	735	93.7	-32%	-6%	-26%
Grain and field beans	15	63	26.6	16	97	32	-6%	-35%	-17%
Livestock	8	59	5.8	10	75	15.3	-20%	-21%	-62%
Farm-product raw materials, nec	3	4	0.4	3	5	0.2	0%	-20%	100%
Wine and distilled beverages	10	229	234.7	11	133	215.6	-9%	72%	9%
Farm supplies	41	350	58.6	56	374	48.5	-27%	-6%	21%
Flowers and florists supplies	28	183	9.1	43	262	14.5	-35%	-30%	-37%
Retail nurseries and garden stores	106	711	79.7	143	786	79	-26%	-10%	1%
Grocery stores	536	15,901	4,081.40	774	23,077	3,144.30	-31%	-31%	30%
Meat and fish markets	47	173	13	74	324	22.6	-36%	-47%	-42%
Fruit and vegetable markets	39	175	9.1	41	258	12.1	-5%	-32%	-25%
Dairy products stores	25	190	7.6	46	328	15.7	-46%	-42%	-52%
Miscellaneous food stores	86	302	16	144	546	24.7	-40%	-45%	-35%
Eating places	1,867	26,882	663.2	2,500	31,629	801.9	-25%	-15%	-17%
Florists	170	610	29.2	246	874	37.8	-31%	-30%	-23%

Source: Marketplace 3rd Quarter 2005 and 3rd Quarter 2000

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

Table E.10: Agribusiness Related Multipliers (2000)				
Industry Code	Sector Name	Output	Employment	Value-Added
1	Oilseed farming	1.230132	1.153054	1.303565
2	Grain farming	1.250597	1.128125	1.358540
3	Vegetable and melon farming	1.296806	1.410423	1.276228
4	Tree nut farming	1.330376	1.412565	1.376284
5	Fruit farming	1.385146	1.348887	1.416841
6	Greenhouse and nursery production	1.372810	1.301462	1.277001
10	All other crop farming	1.280486	1.421521	1.325379
11	Cattle ranching and farming	1.730699	1.659355	4.282998
12	Poultry and egg production	1.208062	1.770496	1.336796
13	Animal production, except cattle and poultry	1.416225	1.138849	2.183695
14	Logging	1.206207	1.539132	1.415692
18	Agriculture and forestry support activities	1.482417	1.207709	1.417445
47	Other animal food manufacturing	1.221655	2.122839	2.659675
60	Frozen food manufacturing	1.269597	1.712710	1.420954
66	Ice cream and frozen dessert manufacturing	1.275616	2.109045	1.461561
67	Animal, except poultry, slaughtering	1.979159	6.204358	3.308579
78	Roasted nuts and peanut butter manufacturing	1.275031	2.685197	1.402606
82	Mayonnaise, dressing, and sauce manufacturing	1.202567	1.796045	1.360005
87	Wineries	1.218084	2.161730	1.283695
405	Food and beverage stores	1.270885	1.123201	1.219711
449	Veterinary services	1.341587	1.240796	1.491941

Source: Minnesota Implan Group, 2002 Data Set; Type SAM Multipliers

Multipliers are most often used to assess the degree to which an industry is linked to other sectors within a local economy by measuring what are known as backward linkages. In layman's terms, backward linkages are a measure of how an industry's sales, employment, value-added, and a host of other factors stimulate sales, employment, etc from the industries and sectors from which they purchase. For instance, in the dairy industry backward linkages would include where the dairy farm makes expenditures on fuel, feed, insurance, dairy equipment, veterinary services, utilities, and so forth. Multipliers for sales, or output, will measure how many times that a dollar of output on the dairy farm circulates through the local economy. In this case, a multiplier of 1 is simply a measure of the output of the dairy farm. It measures no other effect on the economy. Whereas, a multiplier of 2 would indicate that a dollar of sales on the farm created an additional dollar of sales in the community. A multiplier of two would be considered a relatively strong multiplier because each dollar of output on the farm is stimulating another dollar of output elsewhere. *Note: As industries become more reliant global sourcing, and outsourcing, the trend over the last decade or so has been to lower multipliers.*

For the purposes of this study, the project team wanted to explore the level of integration, backward linkages, of the various agricultural and related sectors in Livingston County. The project team felt that a multiplier of 1.5 or higher for output and employment would indicate a relatively strong correlation between industries and therefore developing the upstream marketing for these industries would have a significant trickle down effect on the economy. Unfortunately few agricultural or related industries had multipliers in this range. In terms of output multipliers, only cattle and related production and animal slaughter met this standard. In terms of employment multipliers, local sector fared significantly better with nine industries, mostly in processing, exceeding the 1.5 multiplier threshold. Similar to Output multipliers, Value Added on met the threshold within four sectors; two were farm production oriented (Animal Production – Except Poultry, and Cattle Ranching) and two were processing oriented (Animal Food Manufacturing and Animal Slaughter).

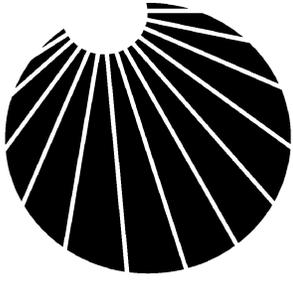
Livingston's multiplier results indicate that the economy remains linkages to agriculture and its support industries and retains some specialization within inter-industry relationships. However, it is likely that these conditions could be improved to the community's benefit over time.

Implications for a Livingston County Agriculture and Farmland Protection Plan

Agriculture in Livingston County and indeed the entire region are relatively strong. Traditional farming in row crops, dairy, livestock, and vegetables remain the economic mainstay of agriculture. High value agriculture such as nursery and greenhouse as well as small “farmettes” are rising in prominence, but do not dominate the production scenery. Implications for the Agriculture and Farmland Protection Plan include:

- Agricultural production is highly influence by the health of the regional dairy industry. The same can be said for the production services and input industries. Therefore, the health of dairy strongly influences the health of the industry.
- While not as predominate, the strength of the vegetable industry has a significant influence on the agricultural infrastructure and is highly dependent on the condition of Birds-Eye Foods.
- Growth in part-time and beginning farmers is modest, but evident in the statistics. Growth in this segment generally indicates the need for additional business development and marketing support due to time limitations and limited experience of farmers.
- Locally, agriculture is dominated by commodity production with little indication that niche and small-scale operations are clustering around specific opportunities.
- The exception to the above is the large equine industry that seems to focus on regional clusters in Monroe and Erie Counties.
- There has been some growth in meat goats and lambs on small operations indicating an opportunity to develop ethnic product markets for H’Alal products.
- Service and supply industries are geared to support livestock and field crop operations. Specialty firms supporting equestrian oriented farms and nursery and greenhouse operations are also growing in importance regionally and may support operations in Livingston County.
- While input and output industries seem strong, concerted development efforts can support further development of these sectors and enhance backward linkages.

The agricultural industry remains just that, an industry in Livingston County. Current conditions show that the industry is stable and well integrated within both the production sectors and the agribusiness input and output sectors. However, these conditions could change rapidly, especially with changes in the dairy markets and should be managed to reduce this risk. Directed economic development support is one means to approach this issue and to keep the region’s rural economy balanced.



FARMLAND INFORMATION CENTER

FACT SHEET

COST OF

COMMUNITY

SERVICES

STUDIES



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DESCRIPTION

Cost of Community Services (COCS) studies are a case study approach used to determine the fiscal contribution of existing local land uses. A subset of the much larger field of fiscal analysis, COCS studies have emerged as an inexpensive and reliable tool to measure direct fiscal relationships. Their particular niche is to evaluate working and open lands on equal ground with residential, commercial and industrial land uses.

COCS studies are a snapshot in time of costs versus revenues for each type of land use. They do not predict future costs or revenues or the impact of future growth. They do provide a baseline of current information to help local officials and citizens make informed land use and policy decisions.

METHODOLOGY

In a COCS study, researchers organize financial records to assign the cost of municipal services to working and open lands, as well as to residential, commercial and industrial development. Researchers meet with local sponsors to define the scope of the project and identify land use categories to study. For example, working lands may include farm, forest and/or ranch lands. Residential development includes all housing, including rentals, but if there is a migrant agricultural work force, temporary housing for these workers would be considered part of agricultural land use. Often in rural communities, commercial and industrial land uses are combined. COCS studies findings are displayed as a set of ratios that compare annual revenues to annual expenditures for a community's unique mix of land uses.

COCS studies involve three basic steps:

1. Collect data on local revenues and expenditures.
2. Group revenues and expenditures and allocate them to the community's major land use categories.
3. Analyze the data and calculate revenue-to-expenditure ratios for each land use category.

The process is straightforward, but ensuring reliable figures requires local oversight. The most complicated task is interpreting existing records to reflect COCS land use categories. Allocating revenues and expenses requires a significant amount of research, including extensive interviews with financial officers and public administrators.

HISTORY

Communities often evaluate the impact of growth on local budgets by conducting or commissioning fiscal impact analyses. Fiscal impact studies project public costs and revenues from different land development patterns. They generally show that residential development is a net fiscal loss for communities and recommend commercial and industrial development as a strategy to balance local budgets.

Rural towns and counties that would benefit from fiscal impact analysis may not have the expertise or resources to conduct a study. Also, fiscal impact analyses rarely consider the contribution of working and other open lands uses, which are very important to rural economies.

American Farmland Trust (AFT) developed COCS studies in the mid-1980s to provide communities with a straightforward and inexpensive way to measure the contribution of agricultural lands to the local tax base. Since then, COCS studies have been conducted in at least 102 communities in the United States.

FUNCTIONS & PURPOSES

Communities pay a high price for unplanned growth. Scattered development frequently causes traffic congestion, air and water pollution, loss of open space and increased demand for costly public services. This is why it is important for citizens and local leaders to understand the relationships between residential and commercial growth, agricultural land use, conservation and their community's bottom line.

COST OF COMMUNITY SERVICES STUDIES

For additional information on farmland protection and stewardship contact the Farmland Information Center. The FIC offers a staffed answer service, online library, program monitoring, fact sheets and other educational materials.

www.farmlandinfo.org

(800) 370-4879

COCS studies help address three claims that are commonly made in rural or suburban communities facing growth pressures:

1. Open lands—including productive farms and forests—are an interim land use that should be developed to their “highest and best use.”
2. Agricultural land gets an unfair tax break when it is assessed at its current use value for farming or ranching instead of at its potential use value for residential or commercial development.
3. Residential development will lower property taxes by increasing the tax base.

While it is true that an acre of land with a new house generates more total revenue than an acre of hay or corn, this tells us little about a community’s bottom line. In areas where agriculture or forestry are major industries, it is especially important to consider the real property tax contribution of privately owned working lands. Working and other open lands may generate less revenue than residential, commercial or industrial properties, but they require little public infrastructure and few services.

COCS studies conducted over the last 20 years show working lands generate more public revenues than they receive back in public services. Their impact on community coffers is similar to

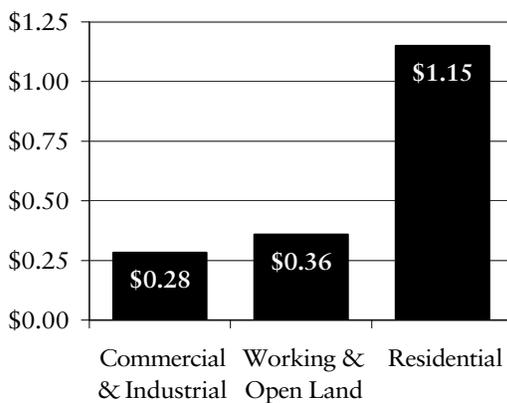
that of other commercial and industrial land uses. On average, because residential land uses do not cover their costs, they must be subsidized by other community land uses. Converting agricultural land to residential land use should not be seen as a way to balance local budgets.

The findings of COCS studies are consistent with those of conventional fiscal impact analyses, which document the high cost of residential development and recommend commercial and industrial development to help balance local budgets. What is unique about COCS studies is that they show that agricultural land is similar to other commercial and industrial uses. In every community studied, farmland has generated a fiscal surplus to help offset the shortfall created by residential demand for public services. This is true even when the land is assessed at its current, agricultural use.

Communities need reliable information to help them see the full picture of their land uses. COCS studies are an inexpensive way to evaluate the net contribution of working and open lands. They can help local leaders discard the notion that natural resources must be converted to other uses to ensure fiscal stability. They also dispel the myths that residential development leads to lower taxes, that differential assessment programs give landowners an “unfair” tax break and that farmland is an interim land use just waiting around for development.

One type of land use is not intrinsically better than another, and COCS studies are not meant to judge the overall public good or long-term merits of any land use or taxing structure. It is up to communities to balance goals such as maintaining affordable housing, creating jobs and conserving land. With good planning, these goals can complement rather than compete with each other. COCS studies give communities another tool to make decisions about their futures.

Median COCS Results



Median cost—per dollar of revenue raised—to provide public services to different land uses.

SUMMARY OF COST OF COMMUNITY SERVICES STUDIES, REVENUE-TO-EXPENDITURE RATIOS IN DOLLARS

Community	Residential including farm houses	Commercial & Industrial	Working & Open Land	Source
Colorado				
Custer County	1 : 1.16	1 : 0.71	1 : 0.54	Haggerty, 2000
Saguache County	1 : 1.17	1 : 0.53	1 : 0.35	Dirt, Inc., 2001
Connecticut				
Bolton	1 : 1.05	1 : 0.23	1 : 0.50	Geisler, 1998
Durham	1 : 1.07	1 : 0.27	1 : 0.23	Southern New England Forest Consortium, 1995
Farmington	1 : 1.33	1 : 0.32	1 : 0.31	Southern New England Forest Consortium, 1995
Hebron	1 : 1.06	1 : 0.47	1 : 0.43	American Farmland Trust, 1986
Litchfield	1 : 1.11	1 : 0.34	1 : 0.34	Southern New England Forest Consortium, 1995
Pomfret	1 : 1.06	1 : 0.27	1 : 0.86	Southern New England Forest Consortium, 1995
Georgia				
Carroll County	1 : 1.29	1 : 0.37	1 : 0.55	Dorfman and Black, 2002
Grady County	1 : 1.72	1 : 0.10	1 : 0.38	Dorfman, 2003
Thomas County	1 : 1.64	1 : 0.38	1 : 0.66	Dorfman, 2003
Idaho				
Canyon County	1 : 1.08	1 : 0.79	1 : 0.54	Hartmans and Meyer, 1997
Cassia County	1 : 1.19	1 : 0.87	1 : 0.41	Hartmans and Meyer, 1997
Kentucky				
Lexington-Fayette	1 : 1.64	1 : 0.22	1 : 0.93	American Farmland Trust, 1999
Oldham County	1 : 1.05	1 : 0.29	1 : 0.44	American Farmland Trust, 2003
Maine				
Bethel	1 : 1.29	1 : 0.59	1 : 0.06	Good, 1994
Maryland				
Carroll County	1 : 1.15	1 : 0.48	1 : 0.45	Carroll County Dept. of Management & Budget, 1994
Cecil County	1 : 1.17	1 : 0.34	1 : 0.66	American Farmland Trust, 2001
Cecil County	1 : 1.12	1 : 0.28	1 : 0.37	Cecil County Office of Economic Development, 1994
Frederick County	1 : 1.14	1 : 0.50	1 : 0.53	American Farmland Trust, 1997
Harford County	1 : 1.11	1 : 0.40	1 : 0.91	American Farmland Trust, 2003
Kent County	1 : 1.05	1 : 0.64	1 : 0.42	American Farmland Trust, 2002
Wicomico County	1 : 1.21	1 : 0.33	1 : 0.96	American Farmland Trust, 2001
Massachusetts				
Agawam	1 : 1.05	1 : 0.44	1 : 0.31	American Farmland Trust, 1992
Becket	1 : 1.02	1 : 0.83	1 : 0.72	Southern New England Forest Consortium, 1995
Deerfield	1 : 1.16	1 : 0.38	1 : 0.29	American Farmland Trust, 1992
Franklin	1 : 1.02	1 : 0.58	1 : 0.40	Southern New England Forest Consortium, 1995
Gill	1 : 1.15	1 : 0.43	1 : 0.38	American Farmland Trust, 1992
Leverett	1 : 1.15	1 : 0.29	1 : 0.25	Southern New England Forest Consortium, 1995
Middleboro	1 : 1.08	1 : 0.47	1 : 0.70	American Farmland Trust, 2001
Southborough	1 : 1.03	1 : 0.26	1 : 0.45	Adams and Hines, 1997
Westford	1 : 1.15	1 : 0.53	1 : 0.39	Southern New England Forest Consortium, 1995
Williamstown	1 : 1.11	1 : 0.34	1 : 0.40	Hazler et al., 1992
Michigan				
Marshall Twp., Calhoun Cty.	1 : 1.47	1 : 0.20	1 : 0.27	American Farmland Trust, 2001
Newton Twp., Calhoun Cty.	1 : 1.20	1 : 0.25	1 : 0.24	American Farmland Trust, 2001
Scio Township	1 : 1.40	1 : 0.28	1 : 0.62	University of Michigan, 1994

SUMMARY OF COST OF COMMUNITY SERVICES STUDIES, REVENUE-TO-EXPENDITURE RATIOS IN DOLLARS

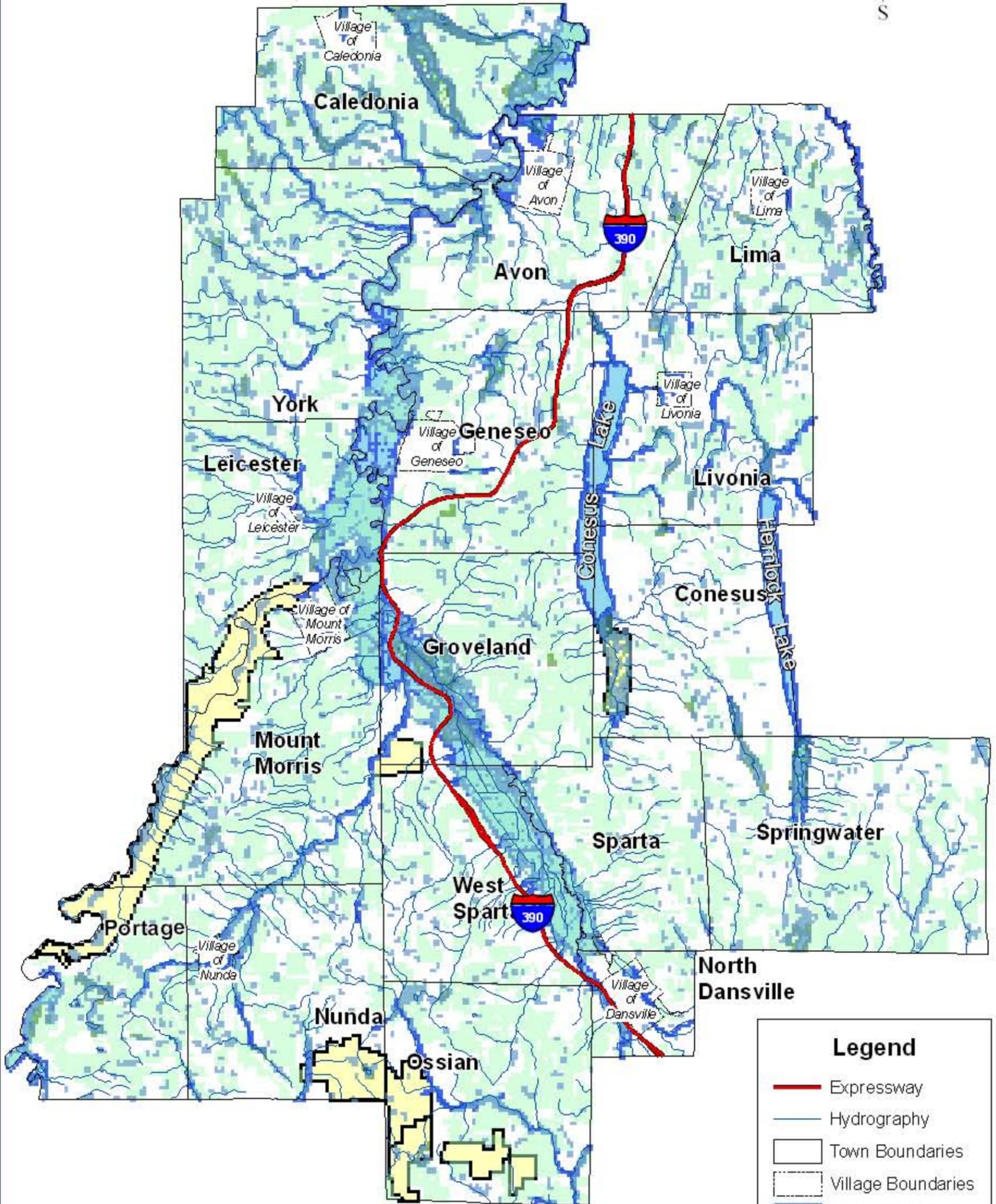
Community	Residential including farm houses	Commercial & Industrial	Working & Open Land	Source
Minnesota				
Farmington	1 : 1.02	1 : 0.79	1 : 0.77	American Farmland Trust, 1994
Lake Elmo	1 : 1.07	1 : 0.20	1 : 0.27	American Farmland Trust, 1994
Independence	1 : 1.03	1 : 0.19	1 : 0.47	American Farmland Trust, 1994
Montana				
Carbon County	1 : 1.60	1 : 0.21	1 : 0.34	Prinzing, 1999
Gallatin County	1 : 1.45	1 : 0.16	1 : 0.25	Haggerty, 1996
Flathead County	1 : 1.23	1 : 0.26	1 : 0.34	Citizens for a Better Flathead, 1999
New Hampshire				
Deerfield	1 : 1.15	1 : 0.22	1 : 0.35	Auger, 1994
Dover	1 : 1.15	1 : 0.63	1 : 0.94	Kingsley et al., 1993
Exeter	1 : 1.07	1 : 0.40	1 : 0.82	Niebling, 1997
Fremont	1 : 1.04	1 : 0.94	1 : 0.36	Auger, 1994
Groton	1 : 1.01	1 : 0.12	1 : 0.88	New Hampshire Wildlife Federation, 2001
Stratham	1 : 1.15	1 : 0.19	1 : 0.40	Auger, 1994
Lyme	1 : 1.05	1 : 0.28	1 : 0.23	Pickard, 2000
New Jersey				
Freehold Township	1 : 1.51	1 : 0.17	1 : 0.33	American Farmland Trust, 1998
Holmdel Township	1 : 1.38	1 : 0.21	1 : 0.66	American Farmland Trust, 1998
Middletown Township	1 : 1.14	1 : 0.34	1 : 0.36	American Farmland Trust, 1998
Upper Freehold Township	1 : 1.18	1 : 0.20	1 : 0.35	American Farmland Trust, 1998
Wall Township	1 : 1.28	1 : 0.30	1 : 0.54	American Farmland Trust, 1998
New York				
Amenia	1 : 1.23	1 : 0.25	1 : 0.17	Bucknall, 1989
Beekman	1 : 1.12	1 : 0.18	1 : 0.48	American Farmland Trust, 1989
Dix	1 : 1.51	1 : 0.27	1 : 0.31	Schuyler County League of Women Voters, 1993
Farmington	1 : 1.22	1 : 0.27	1 : 0.72	Kinsman et al., 1991
Fishkill	1 : 1.23	1 : 0.31	1 : 0.74	Bucknall, 1989
Hector	1 : 1.30	1 : 0.15	1 : 0.28	Schuyler County League of Women Voters, 1993
Kinderhook	1 : 1.05	1 : 0.21	1 : 0.17	Concerned Citizens of Kinderhook, 1996
Montour	1 : 1.50	1 : 0.28	1 : 0.29	Schuyler County League of Women Voters, 1992
Northeast	1 : 1.36	1 : 0.29	1 : 0.21	American Farmland Trust, 1989
Reading	1 : 1.88	1 : 0.26	1 : 0.32	Schuyler County League of Women Voters, 1992
Red Hook	1 : 1.11	1 : 0.20	1 : 0.22	Bucknall, 1989
Ohio				
Clark County	1 : 1.11	1 : 0.38	1 : 0.30	American Farmland Trust, 2003
Knox County	1 : 1.05	1 : 0.38	1 : 0.29	American Farmland Trust, 2003
Madison Village	1 : 1.67	1 : 0.20	1 : 0.38	American Farmland Trust, 1993
Madison Township	1 : 1.40	1 : 0.25	1 : 0.30	American Farmland Trust, 1993
Shalersville Township	1 : 1.58	1 : 0.17	1 : 0.31	Portage County Regional Planning Commission, 1997

SUMMARY OF COST OF COMMUNITY SERVICES STUDIES, REVENUE-TO-EXPENDITURE RATIOS IN DOLLARS

Community	Residential including farm houses	Commercial & Industrial	Working & Open Land	Source
Pennsylvania				
Allegheny Township	1 : 1.06	1 : 0.14	1 : 0.13	Kelsey, 1997
Bedminster Township	1 : 1.12	1 : 0.05	1 : 0.04	Kelsey, 1997
Bethel Township	1 : 1.08	1 : 0.17	1 : 0.06	Kelsey, 1992
Bingham Township	1 : 1.56	1 : 0.16	1 : 0.15	Kelsey, 1994
Buckingham Township	1 : 1.04	1 : 0.15	1 : 0.08	Kelsey, 1996
Carroll Township	1 : 1.03	1 : 0.06	1 : 0.02	Kelsey, 1992
Hopewell Township	1 : 1.27	1 : 0.32	1 : 0.59	The South Central Assembly for Effective Governance, 2002
Maiden Creek Township	1 : 1.28	1 : 0.11	1 : 0.06	Kelsey, 1998
Richmond Township	1 : 1.24	1 : 0.09	1 : 0.04	Kelsey, 1998
Shrewsbury Township	1 : 1.22	1 : 0.15	1 : 0.17	The South Central Assembly for Effective Governance, 2002
Stewardson Township	1 : 2.11	1 : 0.23	1 : 0.31	Kelsey, 1994
Straban Township	1 : 1.10	1 : 0.16	1 : 0.06	Kelsey, 1992
Sweden Township	1 : 1.38	1 : 0.07	1 : 0.08	Kelsey, 1994
Rhode Island				
Hopkinton	1 : 1.08	1 : 0.31	1 : 0.31	Southern New England Forest Consortium, 1995
Little Compton	1 : 1.05	1 : 0.56	1 : 0.37	Southern New England Forest Consortium, 1995
Portsmouth	1 : 1.16	1 : 0.27	1 : 0.39	Johnston, 1997
West Greenwich	1 : 1.46	1 : 0.40	1 : 0.46	Southern New England Forest Consortium, 1995
Texas				
Bandera County	1 : 1.10	1 : 0.26	1 : 0.26	American Farmland Trust, 2002
Bexar County	1 : 1.15	1 : 0.20	1 : 0.18	American Farmland Trust, 2004
Hays County	1 : 1.26	1 : 0.30	1 : 0.33	American Farmland Trust, 2000
Utah				
Cache County	1 : 1.27	1 : 0.25	1 : 0.57	Snyder and Ferguson, 1994
Sevier County	1 : 1.11	1 : 0.31	1 : 0.99	Snyder and Ferguson, 1994
Utah County	1 : 1.23	1 : 0.26	1 : 0.82	Snyder and Ferguson, 1994
Virginia				
Augusta County	1 : 1.22	1 : 0.20	1 : 0.80	Valley Conservation Council, 1997
Clarke County	1 : 1.26	1 : 0.21	1 : 0.15	Piedmont Environmental Council, 1994
Culpeper County	1 : 1.22	1 : 0.41	1 : 0.32	American Farmland Trust, 2003
Frederick County	1 : 1.19	1 : 0.23	1 : 0.33	American Farmland Trust, 2003
Northampton County	1 : 1.13	1 : 0.97	1 : 0.23	American Farmland Trust, 1999
Washington				
Skagit County	1 : 1.25	1 : 0.30	1 : 0.51	American Farmland Trust, 1999
Wisconsin				
Dunn	1 : 1.06	1 : 0.29	1 : 0.18	Town of Dunn, 1994
Dunn	1 : 1.02	1 : 0.55	1 : 0.15	Wisconsin Land Use Research Program, 1999
Perry	1 : 1.20	1 : 1.04	1 : 0.41	Wisconsin Land Use Research Program, 1999
Westport	1 : 1.11	1 : 0.31	1 : 0.13	Wisconsin Land Use Research Program, 1999

American Farmland Trust's Farmland Information Center acts as a clearinghouse for information about Cost of Community Services studies. Inclusion in this table does not necessarily signify review or endorsement by American Farmland Trust.

Livingston County Natural Features Map 2006



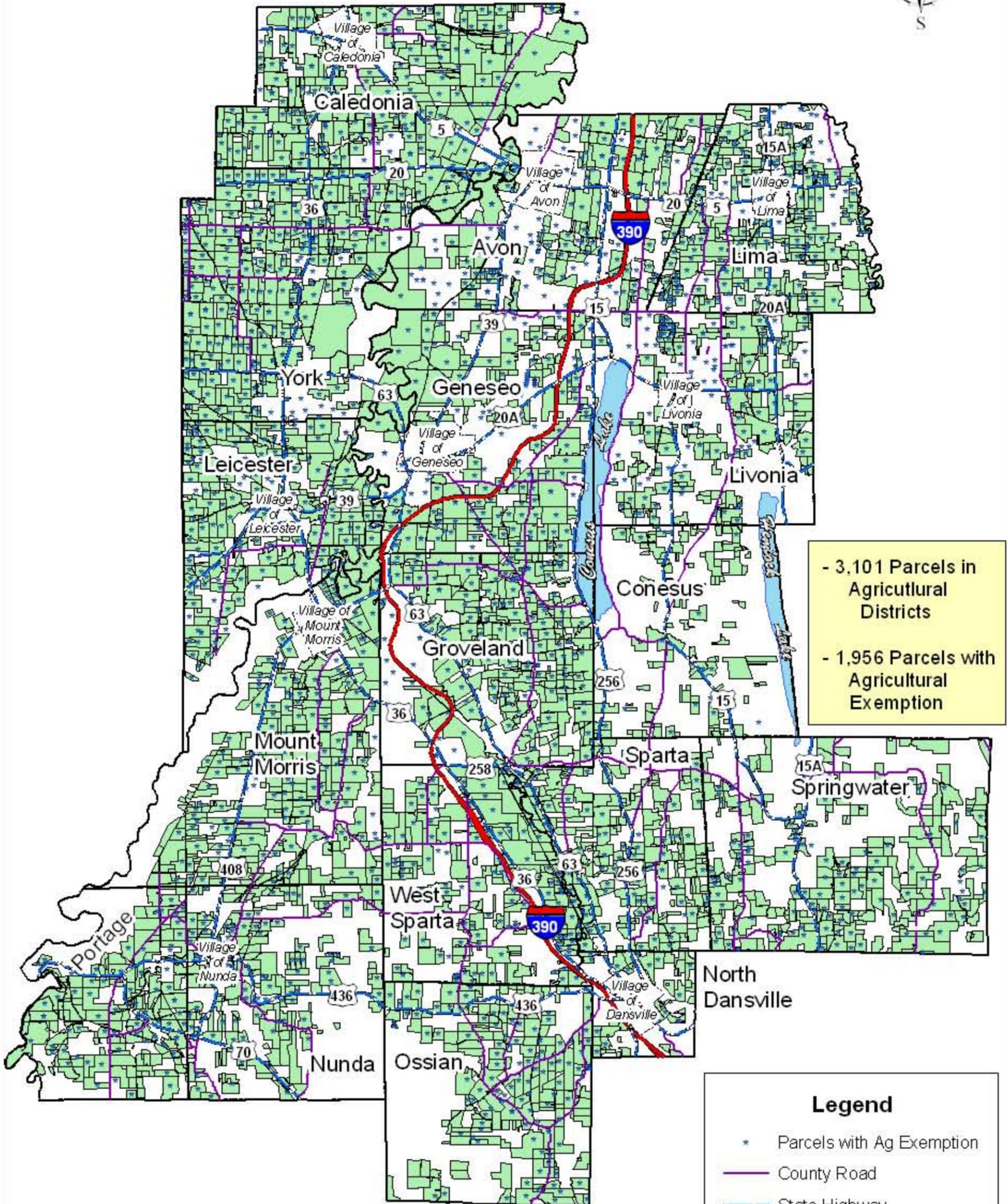
0 3.5 7 Miles

Map Prepared by Livingston County Planning Department: February 2006

Legend

-  Expressway
-  Hydrography
-  Town Boundaries
-  Village Boundaries
-  Federal Wetlands
-  DEC Wetlands
-  Lakes
-  Floodplains
-  State Land
-  Ag District Parcels

Livingston County Agricultural District Parcels and Agricultural Exemptions 2006



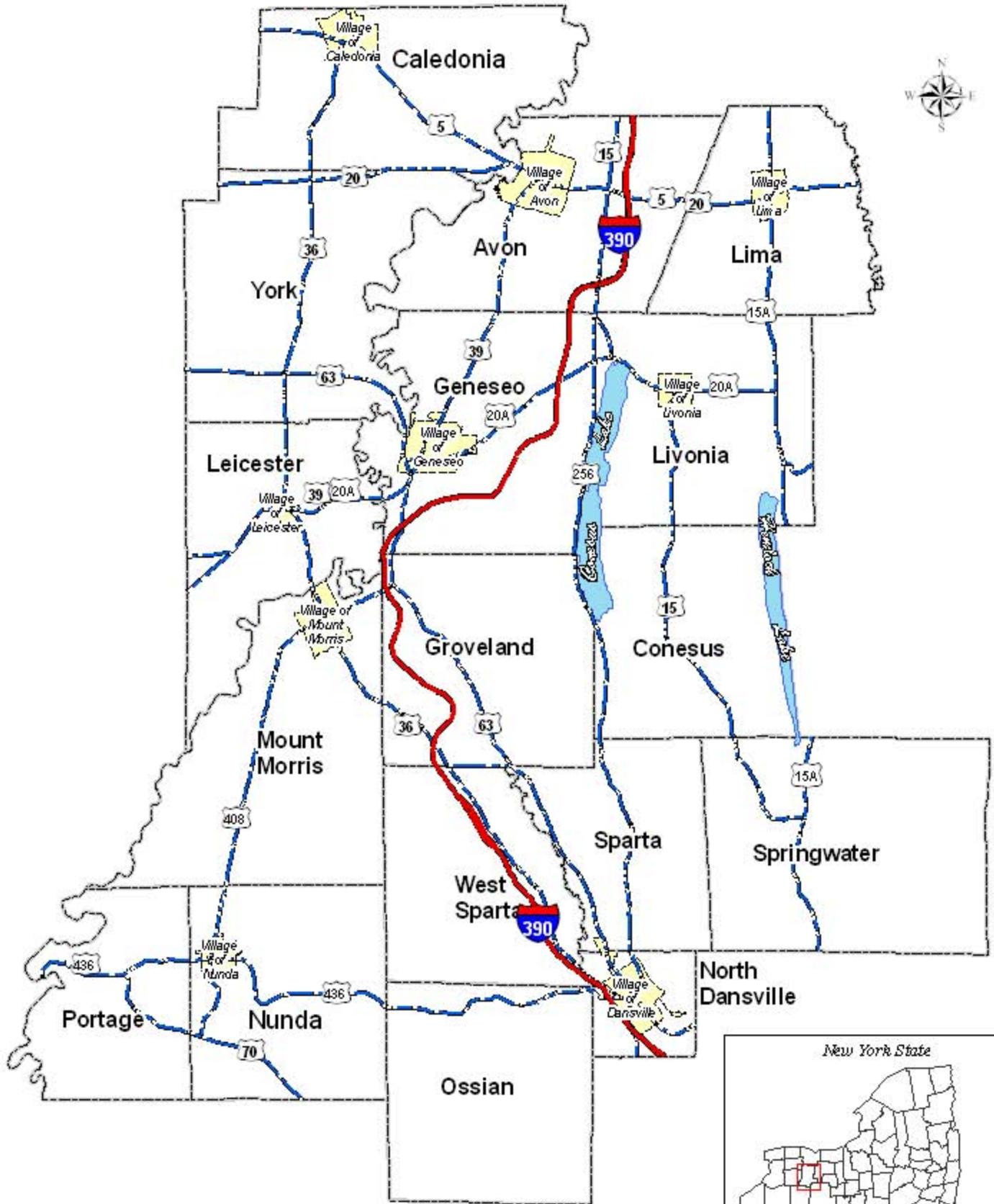
- 3,101 Parcels in Agricultural Districts
 - 1,956 Parcels with Agricultural Exemption

Legend

- Parcels with Ag Exemption
- County Road
- State Highway
- Expressway
- Town Boundaries
- Village Boundaries
- County Ag Districts
- Lakes



Livingston County, New York

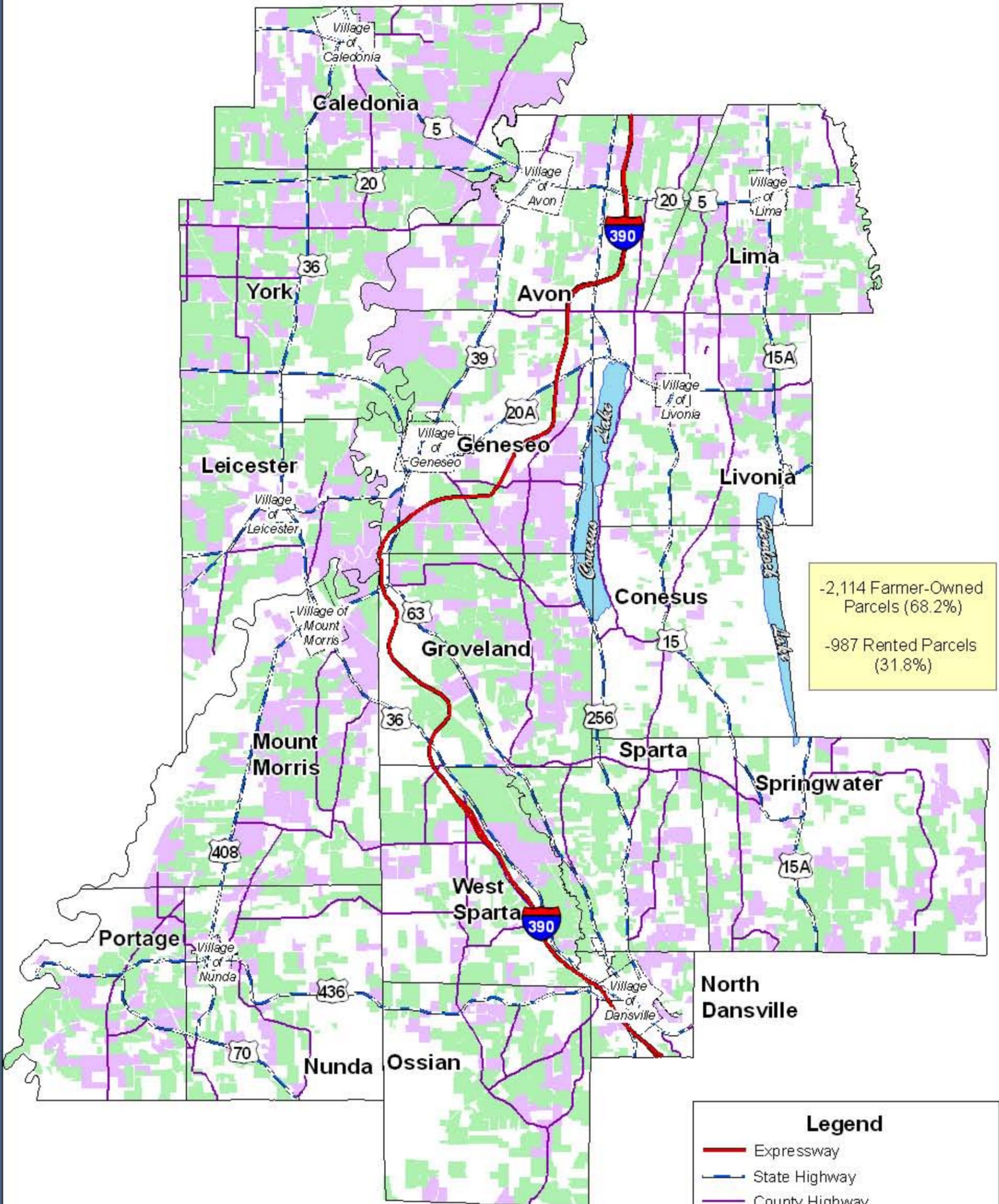


0 4 8 Miles

Map Prepared by Livingston County Planning Department: April 2006



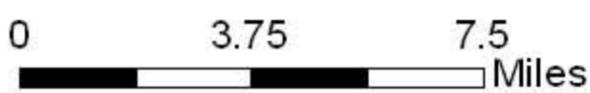
Livingston County Agricultural Districts Farmer-Owned vs. Rented Parcels 2006



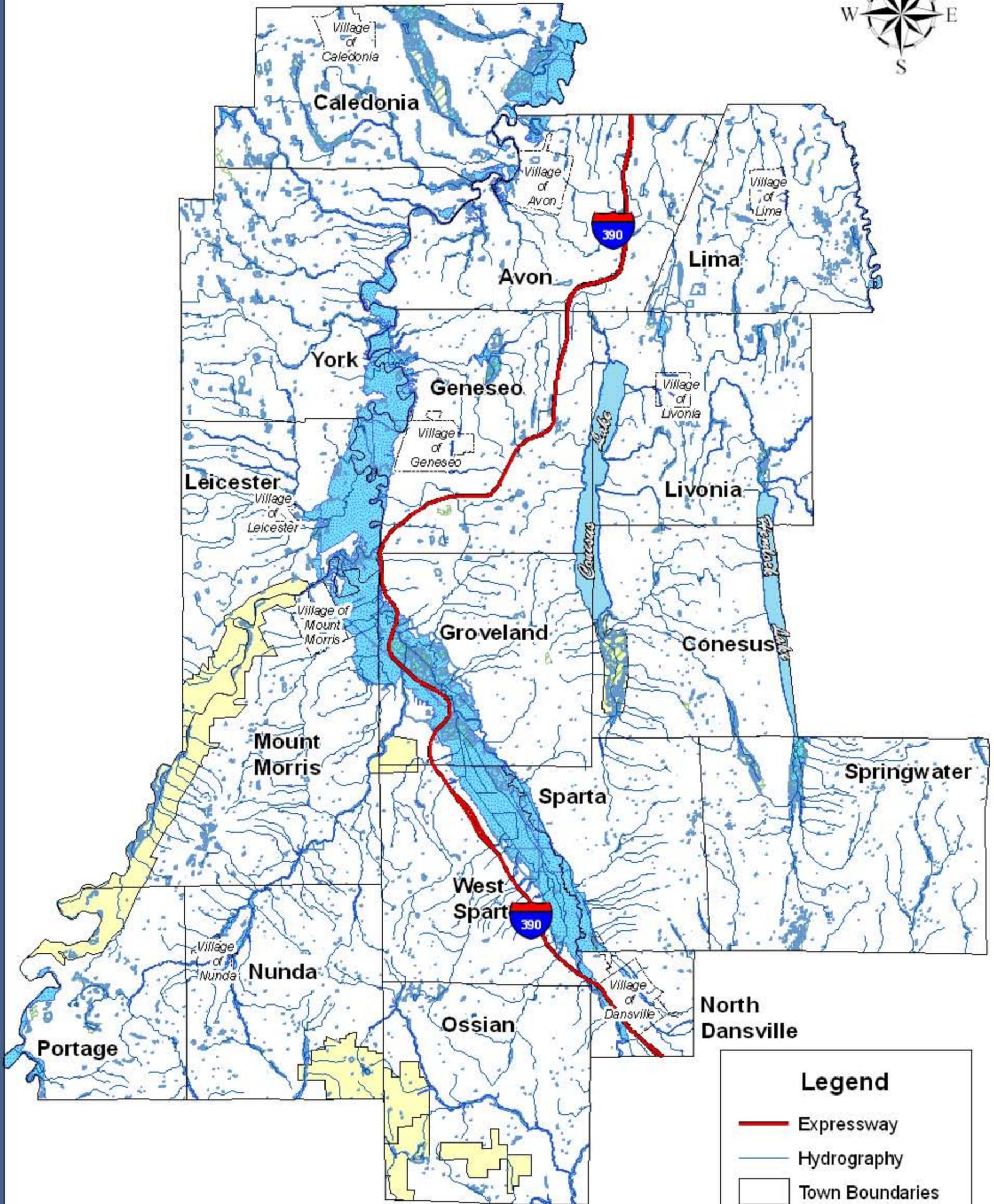
-2,114 Farmer-Owned
Parcels (68.2%)
-987 Rented Parcels
(31.8%)

Legend

- Expressway
- State Highway
- County Highway
- Village Boundaries
- Town Boundaries
- Lakes
- Rented Ag District Parcels
- Farmer-Owned Ag District Parcels



Livingston County Natural Features Map 2006

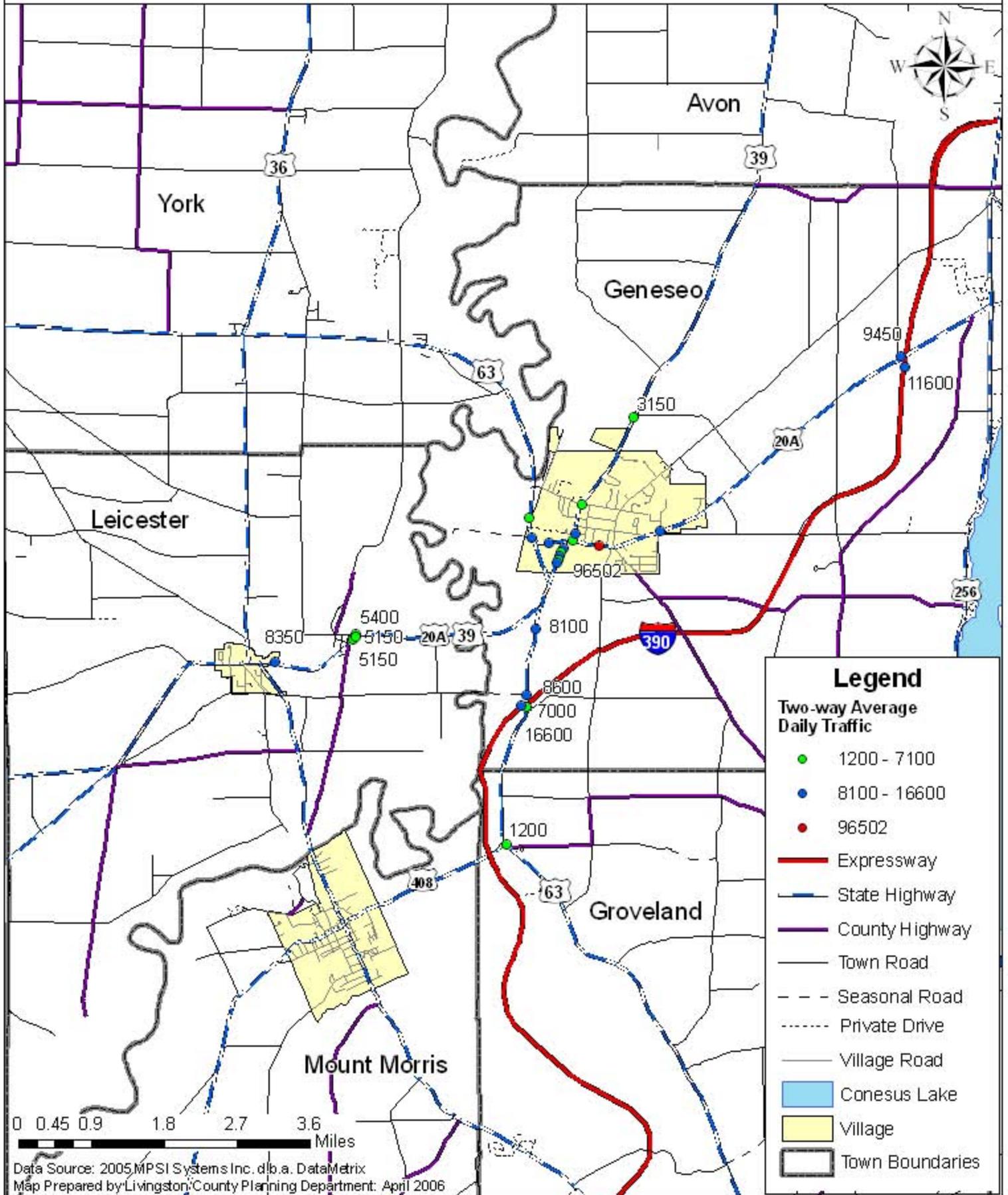


0 3.75 7.5
Miles

Legend

- Expressway
- Hydrography
- Town Boundaries
- Village Boundaries
- Federal Wetlands
- DEC Wetlands
- Lakes
- Floodplains
- State Land

Traffic Counts 1997-1999



0 0.45 0.9 1.8 2.7 3.6 Miles
 Data Source: 2005 MPSI Systems Inc. d/b.a. DataMatrix
 Map Prepared by Livingston County Planning Department: April 2006

LIVINGSTON COUNTY, NEW YORK
PURCHASE OF DEVELOPMENT RIGHTS PROGRAMS

DRAFT ELIGIBILITY CRITERIA

In order to be eligible to participate in a County support Purchase of Development Rights program, the applicant property(s) must meet the following basic requirements:

- AGRICULTURAL DISTRICT:** Property must be enrolled in an agricultural district.
- DEVELOPABILITY:** Applicant property must be developable based on zoning, soils, and other physical characteristics of the property (wetlands, steep slopes, etc.).
- ENCUMBERANCE:** Applicant property may not be wholly encumbered by another restrictive easement or similar encumbrance.
- SIZE:** Applicant property offered as a single easement, or in combination with others, must comprise at least 100 acres. *Note: Individual applicants with fewer than 100 acres must demonstrate that they are contiguous to permanently preserved parcels and will serve a valuable in-fill purpose.*
- SOILS:** Applicant property must contain at least 50% Class I, II, III soils or soils classified as “Unique” by the Natural Resource Conservation Service.
- STEWARDSHIP:** Land must have a Soil Conservation and Water Quality Plan, Forest Management Plan, Nutrient Management Plan, CAFO Plan, or similar plan.
- TAX STANDING:** Must be in good standing with local, state, federal tax authorities.

DRAFT RANKING FORMULA

Once an applicant has passed the initial screening outlined above, the applicant will be ranked against concurrent applications using the following formula. (Maximum score is 160)

Farm Characteristics (Maximum of 60 Points)

1. Soil Quality (Maximum 30 points) _____Points
 - Applicant property has 60% or greater Class I and II soils (30 points)
 - Applicant property has 40% to 59% Class I and II soils (20 points)

2. Size of Application (Maximum 30 points) _____Points
 - Application represents more than 200 acres (20 points)
 - Application represents 100 to 199 acres (10 points)
 - Application represents less than 100 acres, but is contiguous to permanently preserved parcels of more than 100 acres (5 points)
 - Application represents contiguous acreage (10 points)

LIVINGSTON COUNTY, NEW YORK
PURCHASE OF DEVELOPMENT RIGHTS PROGRAMS

Location Factors (Maximum of 75 points)

5. Adjacency to Agricultural Land (Maximum 20 points) _____Points

Applicant property is adjacent to permanently protected land (20 points)

Applicant property is within ½ mile of permanently protected land (10 points)

Applicant property is adjacent to actively farmed land (10 points)

6. Adjacency to water and sewer service, I-390 access points, or principal/major arterial roadway (Maximum 20 points) _____Points

Adjacent to water or sewer lines (10 points)

Adjacent to I-390 access points or principal/major arterial roadway (10 Points)

Proximate to (within ½ mile) water or sewer lines (5 Points)

Proximate to (within ½ mile)I-390 access points or principal/major arterial roadway (5 Points)

7. Adjacency to developed areas (Maximum 10 points) _____Points

Adjacent to Villages and designated development areas (10 points)

8. Road Frontage (Maximum 10 points) _____Points

Total feet of road frontage (up to 5,000 feet) _____/500

9. Development Pressure (Maximum 5 points) _____Points

Town growth rate (5-yr simple average of new housing units) exceeds

County growth rate. (5 points)

10. Adjacency to critical environmental areas or unique natural resources (Maximum 10 points) _____Points

Adjacent to or within a critical or unique environmental resource (e.g. Conesus Lake Watershed, parks, environmental areas, etc) (10 Points)

Discretionary Points (Maximum of 25 points) _____Points

At the Agricultural and Farmland Protection Board's discretion, it may award up to 25 points to an applicant's ranking score based on qualitative considerations or specific localized conditions at the time of the application. The rationale for awarding such points should be clearly delineated and may include factors such as:

- Value of the easement purchase (cost of easement relative to appraised value)
- Consistency of application with County, town, and municipal plans
- Imminent sale or intergenerational transfer
- Operational continuity
- Exceptional scenic value
- Economic productivity
- Cultural or historic significance
- Farm contains important agricultural infrastructure

LIVINGSTON COUNTY, NEW YORK
PURCHASE OF DEVELOPMENT RIGHTS PROGRAMS

Table 1

FHWA Rural Functional Classification vs BIA Functional Classification

FHWA RURAL FUNCTIONAL CLASSIFICATION	BIA FUNCTIONAL CLASSIFICATION	COMMENTS
<p>Principal Arterial - FHWA Principal Arterials are essentially the National Highway System including the Interstate. They represent an integrated network of continuous routes which serve statewide or interstate travel and serve virtually all urban areas of 50,000 pop. and most more than 25,000 pop.</p>	<p>Class 2 - Major or minor arterial roads providing an integrated network having the characteristics for serving traffic between large population centers, generally without stub connections. May also link smaller towns and communities to major resort areas which attract travel over long distances and generally provide for relatively high overall travel speeds with minimum interference to through traffic movement. Generally provide for at least inter-county or interstate service and are spaced at intervals consistent with population density.</p>	<p>Very few FHWA principal arterial, such as the NHS, will be on the BIA system.</p>
<p>Minor Arterial - FHWA minor arterials are roads which in conjunction with principal arterials form an integrated network that links, cities and larger towns, and other significant traffic generators and provide interstate and inter-county service.</p>		<p>A few FHWA minor arterials will be on the BIA system</p>
<p>Major Collectors- FHWA major collectors are roads that connect with the arterials and provide intra-county service to any county seat not on an arterial route and to larger towns and traffic generators not served directly by an arterial.</p>		<p>Some FHWA major collectors will be on the BIA system.</p>
<p>Minor Collectors - FHWA minor collectors collect traffic from local roads and bring it to the major collectors thereby bringing all developed areas, smaller communities and locally important traffic generators within a reasonable distance of a major collector road.</p>	<p>Class 4 - Section line and/or stub type roads which collect traffic for arterial type roads, made connections within the grid of the IRR system. May serve areas around villages, into farming areas, to schools, tourist attractions or various small enterprises. Also including roads and vehicular trails for administration of forest, grazing, mining, oil, recreation, or other utilization purposes. This classification encompasses all those public roads not falling into either the Class 2 or 3 definitions above.</p>	<p>It is common for an FHWA minor collector to be on the BIA system.</p>
<p>Locals - Local roads primarily provide access to adjoining land and short distance travel service compared to arterials and collectors.</p>	<p>Class 3 - Streets-roads which are located within communities serving residential and other urban type settings.</p>	<p>The majority of the FHWA classified roads are locals, while the majority of travel on the system is on the higher classified roads. Most BIA Class 3 roads are FHWA locals.</p>
<p>Non-classified (trails, etc.)</p>	<p>Class 5 - This classification encompasses all non-road type paths, trails, walkways, or other designated types of routes for public use by foot traffic, bicycles, trail bikes or other uses to provide for general access of non-vehicular traffic.</p>	<p>FHWA does not classify roads that fall in BIA Class 5.</p>

ARTICLE I, Right to Farm [Adopted 3-14-2001 by L.L. No. 2-2001]

§ 106-1. Legislative intent and purposes.

A. The Eden Town Board finds, declares, and determines that agriculture is vital to the Town of Eden, New York, because it is a livelihood and provides employment for agriservice; provides locally produced, fresh commodities; agricultural diversity promotes economic stability; agriculture maintains open space and promotes environmental quality, and agricultural land does not increase the demand for services provided by local governments. In order to maintain a viable farming economy in the Town of Eden, farmers must be afforded protection allowing them the right to farm. When nonagricultural land uses extend into agricultural areas, agricultural operations may become the subject of nuisance suits. As a result, agricultural operations are sometimes forced to cease operation or are discouraged from making investments in agricultural improvements.

B. It is the purpose of this article to reduce the loss to the Town of Eden of its agricultural resources by limiting the circumstances under which farming may be deemed to be a nuisance and to allow agricultural practices inherent to and necessary for the business of farming to proceed and be undertaken free of unreasonable and unwarranted interference or restriction.

§ 106-2. Definitions.

A. As used in this article, the following terms shall have the meanings indicated:

AGRICULTURAL PRACTICES -- All activities conducted by a farmer on a farm to produce agricultural products and which are inherent and necessary to the operation of a farm and the on-farm production, processing, and marketing of agricultural products, including, but not limited to, the collection, transportation, distribution, storage, and land application of animal wastes; storage, transportation, and use of equipment for tillage, planting, harvesting, irrigation, fertilization, and pesticide application; storage and use of legally permitted fertilizers, limes, and pesticides all in accordance with local, state and federal law and regulations and in accordance with manufacturers' instructions and warnings; storage, use, and application of animal feed and foodstuffs, construction and use of farm structures and facilities for the storage of animal wastes, farm equipment, pesticides, fertilizers, agricultural products, and livestock, for the sale of agricultural products, and for the use of farm labor, as permitted by local and state building codes and regulations, including the construction and maintenance of fences.

AGRICULTURAL PRODUCTS -- Those products as defined in § 301(2) of Article 25-AA of the Agricultural and Markets Law.

FARM -- The land, buildings, farm residential buildings, and machinery used in the production, whether for profit or otherwise, of agricultural products.

FARMER -- Any person, organization, entity, association, partnership, or corporation engaged in the business of agriculture, for profit or otherwise, including the cultivation of land, the raising of crops, or the raising of livestock, poultry, fur-bearing animals, or fish, the harvesting of timber or the practicing of horticulture or apiculture.

GENERALLY ACCEPTED AGRICULTURAL PRACTICES -- Those practices which are feasible, lawful, inherent, customary, necessary, reasonable, normal, safe, and typical to the industry or unique to the commodity as they pertain to the practices listed in the definition of "agricultural practices."

RESOLUTION COMMITTEE -- Shall be made up of the Chairman of the Conservation Board or designee, Chairman of the Agricultural Committee or designee, and a member of one other standing committee of the Town designated by the Town Supervisor.

B. Unless specifically defined, above words or phrases used in the article shall be interpreted so as to give them meanings they have in common usage, and to give this article its most reasonable application.

§ 106-3. Authority to engage in agricultural practices.

A. Farmers, as well as those employed, retained, or otherwise authorized to act on behalf of farmers, may lawfully engage in agricultural practices within the Town of Eden at all such times and in all such locations as are reasonably necessary to conduct the business of agriculture. For any agricultural practice, in determining the reasonableness of the time, place, and methodology of such practice, due weight and consideration shall be given to both traditional customs and procedures in the farming industry as well as to advances resulting from increased knowledge and improved technologies.

B. Agricultural practices conducted on farmland shall not be found to be a public or private nuisance if such agricultural practices are:

- (1) Reasonable and necessary to the particular farm or farm operation.
- (2) Conducted in a manner which is not negligent or reckless.
- (3) Conducted in conformity with generally accepted agricultural practices.
- (4) Conducted in conformity with all local, state, and federal laws and regulations.
- (5) Conducted in a manner which does not constitute a threat to public health and safety or cause injury to health or safety of any person; and
- (6) Conducted in a manner which does not unreasonably obstruct the free passage or use of navigable waters or public roadways.

C. Nothing in this article shall be construed to prohibit an aggrieved party from recovering damages for bodily injury or wrongful death.

§ 106-4. Duty of Town officers and boards to consider impact of farm operations on certain applications.

The legislative intent and purposes of this article shall be taken into consideration by each Town officer and/or board in processing any application requesting rezoning, site plan approval and/or special use permit approval when the property which is the subject of such application is located within one mile of an existing farm. Such Town officer and/or board shall, as part of its review of such application, determine whether appropriate and reasonable conditions may be prescribed or required, which would further the purposes and intent of this article as part of an approval of the application. Such appropriate and reasonable conditions shall be determined on a case-by-case basis and may include, but not be limited to, requiring declarations, deed restrictions and/or covenants which run with the land which would notify future purchasers and owners of the subject property that owning and occupying such property might expose them to certain discomforts or inconveniences resulting from the conditions associated with agricultural practices and operations in the Town.

§ 106-5. Informal resolution of disputes.

A. Should any controversy arise regarding any inconveniences or discomforts occasioned by agricultural operation, including, but not limited to, noise, odors, fumes, dust, the operation of machinery, the storage and disposal of manure, and the application by spraying or otherwise of chemical fertilizers, soil amendments, herbicides and/or pesticides, the parties may submit the controversy to the resolution committee as set forth below in an attempt to resolve the matter prior to the filing of any court action.

B. Any controversy between the parties may be submitted to the resolution committee, whose decision shall be advisory only, within 30 days of the date of the occurrence of the particular activity giving rise to the controversy or of the date a party became aware of the occurrence.

C. The effectiveness of the resolution committee as a forum for resolution of grievances is dependent upon full discussion and complete presentation of all pertinent facts concerning the dispute in order to eliminate any misunderstandings. The parties are encouraged to cooperate in the exchange of pertinent information concerning the controversy.

D. The controversy shall be presented to the committee by written request of one of the parties within the time limits prescribed above. Thereafter, the committee may investigate the facts of the controversy but must, within 30 days, hold a meeting to consider the merits of the matter and within 20 days of the meeting must render a written decision to the parties. At the time of the meeting, both parties shall have an opportunity to present what each party considers to be the pertinent facts.

Yates County, New York

Agricultural Development and Farmland Enhancement Plan

Model Right to Farm Law

Be it enacted by the Town Board of the Town of _____ as follows:

Section 1. Legislative Intent and Purpose

The Town Board recognizes farming is an essential enterprise and an important industry which enhances the economic base, natural environment and quality of life in the Town of _____. The Town Board further declares that it shall be the policy of this Town to encourage agriculture and foster understanding by all residents of the necessary day to day operations involved in farming so as to encourage cooperation with those practices.

It is the general purpose and intent of this law to maintain and preserve the rural traditions and character of the Town, to permit the continuation of agricultural practices, to protect the existence and operation of farms, to encourage the initiation and expansion of farms and agri-businesses, and to promote new ways to resolve disputes concerning agricultural practices and farm operations. In order to maintain a viable farming economy in the Town of _____, it is necessary to limit the circumstances under which farming may be deemed to be nuisance and to allow agricultural practices inherent to and necessary for the business of farming to proceed and be undertaken free of unreasonable and unwarranted interference or restriction.

Section 2. Definitions

1. "Farmland" shall mean land used in agricultural production, as defined in subdivision four of section 301 of Article 25AA of the State Agriculture and Markets Law.
2. "Farmer" shall mean any person, organization, entity, association, partnership, limited liability company, or corporation engaged in the business of agriculture, whether for profit or otherwise, including the cultivation of land, the raising of crops, or the raising of livestock.
3. "Agricultural products" shall mean those products as defined in section 301(2) of Article 25AA of the State Agriculture and Markets Law, including but not limited to:
 - a. Field crops, including corn, wheat, rye, barley, hay, potatoes and dry beans.
 - b. Fruits, including apples, peaches, grapes, cherries and berries.
 - c. Vegetables, including tomatoes, snap beans, cabbage, carrots, beets and onions.
 - d. Horticultural specialties, including nursery stock, ornamental shrubs, ornamental trees and flowers.
 - e. Livestock and livestock products, including cattle, sheep, hogs, goats, horses, poultry, llamas, ratites, such as ostriches, emus, rheas and kiwis, farmed deer, farmed buffalo, fur bearing animals, milk and milk products, eggs, furs, and poultry products.
 - f. Maple sap and sugar products.
 - g. Christmas trees derived from a managed Christmas tree operation whether dug for transplanting or cut from the stump.
 - h. Aquaculture products, including fish, fish products, water plants and shellfish.
 - i. Short rotation woody crops raised for bioenergy.
 - j. Production and sale of woodland products, including but not limited to logs, lumber, posts and firewood.

Yates County, New York

Agricultural Development and Farmland Enhancement Plan

4. "Agricultural practices" shall mean those practices necessary for the on-farm production, preparation and marketing of agricultural commodities. Examples of such practices include, but are not limited to, operation of farm equipment, proper use of agricultural chemicals and other crop production methods, and construction and use of farm structures.
5. "Farm operation" shall be defined in section 301 (11) in the State Agriculture and Markets Law.

Section 3. Right-to-Farm Declaration

Farmers, as well as those employed, retained, or otherwise authorized to act on behalf of farmers, may lawfully engage in agricultural practices within this Town at all times and all such locations as are reasonably necessary to conduct the business of agriculture. For any agricultural practice, in determining the reasonableness of the time, place, and methodology of such practice, due weight and consideration shall be given to both traditional customs and procedures in the farming industry as well as to advances resulting from increased knowledge, research and improved technologies.

Agricultural practices conducted on farmland shall not be found to be a public or private nuisance if such agricultural practices are:

1. Reasonable and necessary to the particular farm or farm operation,
2. Conducted in a manner which is not negligent or reckless,
3. Conducted in conformity with generally accepted and sound agricultural practices,
4. Conducted in conformity with all local state, and federal laws and regulations,
5. Conducted in a manner which does not constitute a threat to public health and safety or cause injury to health or safety of any person, and
6. Conducted in a manner which does not reasonably obstruct the free passage or use of navigable waters or public roadways.

Nothing in this local law shall be construed to prohibit an aggrieved party from recovering from damages for bodily injury or wrongful death due to a failure to follow sound agricultural practice, as outlined in this section.

Section 4. Notification of Real Estate Buyers

In order to promote harmony between farmers and their neighbors, the Town requires land holders and/or their agents and assigns to comply with Section 310 of Article 25-AA of the State Agriculture and Markets Law and provide notice to prospective purchasers and occupants as follows: "It is the policy of this state and this community to conserve, protect and encourage the development and improvement of agricultural land for the production of food, and other products and also for its natural and ecological value. This notice is to inform prospective residents that the property they are about to acquire lies partially or wholly within an agricultural district and that farming activities occur within the district. Such farming activities may include, but not be limited to, activities that cause noise, dust and odors." This notice shall be provided to prospective purchase of property within an agricultural district or on property with boundaries within 500 feet of a farm operation located in an agricultural district.

A copy of this notice shall included by the seller or seller's agent as an addendum to the purchase and sale contract at the time an offer to purchase is made.

Yates County, New York

Agricultural Development and Farmland Enhancement Plan

Section 5. Resolution of Disputes

1. Should any controversy arise regarding any inconveniences or discomfort occasioned by agricultural operations which cannot be settled by direct negotiation between the parties involved, either party may submit the controversy to a dispute resolution committee as set forth below in an attempt to resolve the matter prior to the filing of any court action and prior to a request for a determination by the Commission or Agriculture and Markets about whether the practice in question is sound pursuant to Section 308 of Article 25AA of the State Agriculture and Markets Law.
2. Any controversy between the parties shall be submitted to the committee within thirty (30) days of the last date of occurrence of the particular activity giving rise to the controversy or the date the party became aware of the occurrence.
3. The committee shall be composed of three (3) members from the Town selected by the Town Board, as the need arises, including one representative from the farm community, one person from Town government and one person mutually agreed upon by both parties involved in the dispute.
4. The effectiveness of the committee as a forum for the resolution of disputes is dependent upon full discussion and complete presentation of all pertinent facts concerning the dispute in order to eliminate any misunderstandings. The parties are encouraged to cooperate in the exchange of pertinent information concerning the controversy.
5. The controversy shall be presented to the committee by written request of one of the parties within the time limits specified. Therefore after, the committee may investigate the facts of the controversy but must, within twenty-five (25) days, hold a meeting at a mutually agreed place and time to consider the merits of the matter and within five (5) days of the meeting render a written decision to the parties. At the time of the meeting, both parties shall have an opportunity to present what each consider to be pertinent facts. No party bringing a complaint to the committee for settlement or resolution may be represented by counsel unless the opposing party is also represented by counsel. The time limits provided in this subsection for action by the committee may be extended upon the written stipulation of all parties in the dispute.
6. Any reasonable costs associated with the function of the committee process shall be borne by the participants.

Section 6. Severability Clause

If any part of this local law is for any reason held to be unconstitutional or invalid, such decision shall not effect the remainder of this Local Law. The Town hereby declares that it would have passed this local law and each section and subsection thereof, irrespective of the fact that any one or more of these sections, subsections, sentences, clauses or phrases may be declared unconstitutional or invalid.

Section 7. Precedence

This Local Law and its provisions are in addition to all other applicable laws, rules and regulations.

Section 8. Effective Date

This Local Law shall be effective immediately upon filing with the New York Secretary of State.