BUFFALO NIAGARA PROSPERITY INITIATIVE

Buffalo Niagara Prosperity Report

2026

An Initiative of

BNP BUFFALO NIAGARA PARTNERSHIP

MESSAGE FROM GRANT LOOMIS

This is not just a report or another study.

The Buffalo Niagara Prosperity Report completes the first step of the **Buffalo Niagara Prosperity Initiative**. It is designed to help our region better understand where we stand today and what will shape our future tomorrow. By benchmarking our region against peer metros that are both realistic and aspirational, the report examines indicators that define regional competitiveness and economic health with a focus on workforce, innovation, transportation, infrastructure, housing, quality of place, and the industries that undergird our economy. The objective is not simply to assemble more data. It is to establish a data-driven understanding of Buffalo Niagara's strengths, challenges and opportunities.

We have a lot to be proud of in Buffalo Niagara — a diversifying economy, strong higher education institutions, and an appealing way of life rooted in distinct neighborhoods and communities, supported by robust homeownership, healthcare access, and reliable infrastructure. The region ranks among the top peer metros in degree production, research and development, and key wellbeing indicators, and it outperforms many benchmarks in job growth for sectors and industries such as advanced manufacturing, clean energy, food and beverage processing, and semiconductors.

At the same time, **the report underscores areas that demand our attention**. Population growth has remained limited; business formation trails many peer regions; and too many residents are not fully participating in the region's economic progress. While employment and economic output have expanded in recent years, those gains have not consistently translated into stronger wage growth, higher household incomes, or broadly shared prosperity. Addressing these challenges will require a continued focus on strengthening existing employers and recruiting new firms, cultivating entrepreneurship and innovation, attracting and retaining talent, and ensuring that opportunity reaches every community across Buffalo Niagara.

The purpose of this report is not simply to measure performance but to inform the second step: development of a Regional Economic Growth Strategy. Using the Prosperity Report as our baseline, employers and regional partners will identify a handful of priorities with maximum potential to create jobs, spur investment, and position our region for sustainable economic growth. The strategy will establish measurable goals, identify organizations to lead specific priorities, and create a framework for tracking our collective progress and impact.

The Buffalo Niagara Prosperity Initiative is an **organizing platform for action** — one that builds upon successful work already underway and prioritizes collaboration. BNP is serving as a catalyst for this effort but should not and cannot own every solution. Our role is to bring employers and public-sector, education, and other community partners together around shared goals and objectives, and to provide the backbone to help sustain the work over time.

The opportunities before us are significant and potentially transformative. By building on our strengths, confronting our challenges honestly, and working together across sectors and ZIP codes, we can create a future marked by greater growth, competitiveness, and prosperity for all who call Buffalo Niagara home.



Grant Loomis
President & CEO
Buffalo Niagara Partnership

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Community Foundation for Greater Buffalo

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Photo Credit: Visit Buffalo; Photo by Matthew Digati

REGIONAL BENCHMARKING OVERVIEW

The Buffalo Niagara Prosperity Report is anchored in regional benchmarking that puts Buffalo Niagara's performance in a comparative context alongside peer and aspirational metropolitan statistical areas (MSAs). The regions reflect similarities in economic history, industrial composition, geographic characteristics (urban, rural, and suburban landscapes), and comparable populations. The benchmarks include locations that Buffalo Niagara competes against today and those that it could compete with in the future.

The analysis covers a multitude of economic, demographic, and quality-of-life indicators that offer a broad perspective on how Buffalo Niagara appeals to businesses and people. The insights shared will help identify where the region is competitive, where gaps and barriers exist, and where progress is needed.

Industry benchmarking takes a close look at established regional sectors and industries, as well as those that are nascent and emerging. This data can help inform where Buffalo Niagara is best positioned to compete in terms of jobs, capital investment, and innovation.

BENCHMARK METROS

Cincinnati, OH
Cleveland, OH
Columbus, OH
Indianapolis, IN
Louisville, KY
Memphis, TN
Milwaukee, WI
Nashville, TN
Pittsburgh, PA
Providence, RI
Richmond, VA
Salt Lake City, UT

KEY SECTORS AND INDUSTRIES

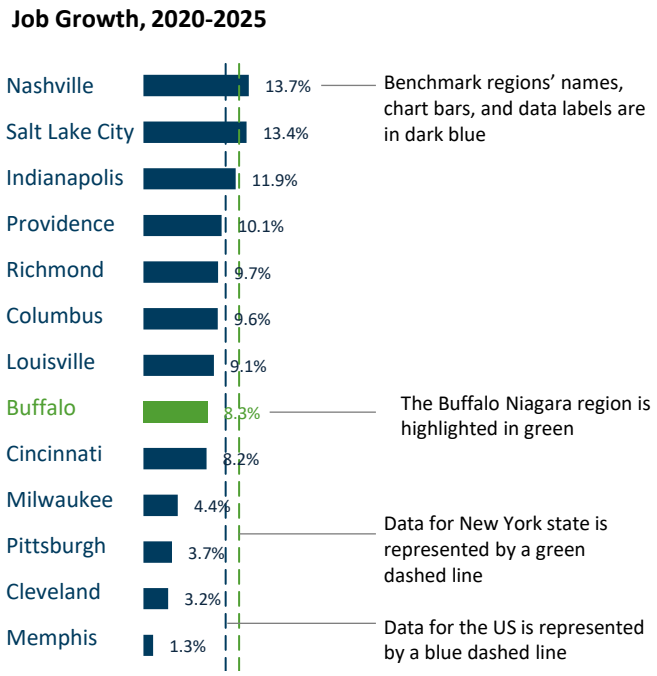
- Advanced Manufacturing
- Advanced Business Services
- Health & Life Sciences
- Tourism & Hospitality
- Logistics & Distribution
- Information Technology
- Food & Beverage Processing
- Clean Energy
- Semiconductors
- Agribusiness

Industry selection informed by target industries for Invest Buffalo Niagara, Empire State Development, and broader market trends in the state and region.

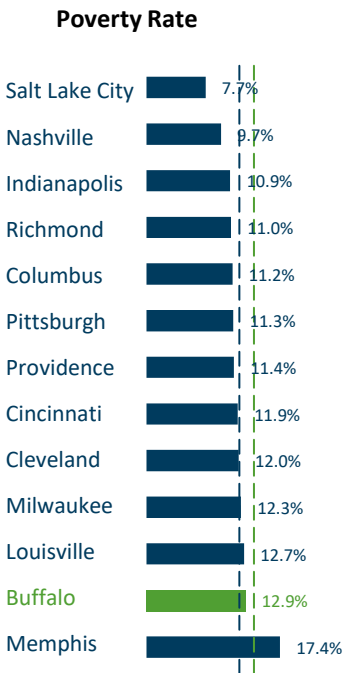
HOW TO READ BENCHMARKING CHARTS

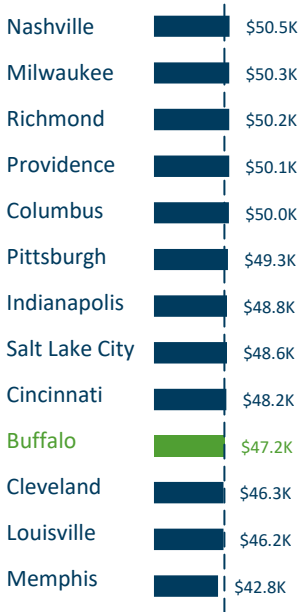
Data for each benchmarking indicator is represented by a bar chart like the example below

Metro areas are listed in order from the best-performing regions on top to the worst-performing regions on bottom



For some indicators, the best-performing benchmark regions are those with lowest numbers or rates. Examples include poverty rate, housing costs, health risks, and racial disparities.





In some cases, the data for New York state, the US, or both may be outside the data range of the chart – for example, above the highest benchmark region value. In these cases, the NY and/or US data are shown in a box(es) instead of a line(s).

NY=$51.2K

BUFFALO NIAGARA COMPARATIVE PERFORMANCE

POPULATION

The Buffalo Niagara region is entering a period of demographic transition. Population is anticipated to remain relatively flat, though with a minor reversal of a -0.8% decrease from 2020 to 2025 to a 0.7% increase by 2035. Contributing to the recent dampening of growth are converging trends of the declining working-age population and slowing of international migration, with the potential continuation of the latter not fully factored into 2035 projections. Buffalo Niagara is not alone among benchmark regions with declining working-age demographics in recent years, while international migration declined sharply between 2024 and 2025. These demographic shifts place added pressure on the region's ability to attract and retain workers to fill jobs and residents to sustain neighborhoods, communities, and local establishments, all key ingredients for future growth.

Population stabilization alone, however, will not ensure broadly shared prosperity. Buffalo Niagara's median household income of approximately $72,300 remains near the bottom of the peer group, while substantial income differences between White, Black, and Hispanic households demonstrate that economic opportunity is not distributed evenly. The region's overall poverty rate is relatively close to that of several peers, but poverty is more geographically concentrated, leaving some neighborhoods disconnected from the region's economic progress. Buffalo Niagara's next chapter will depend not only on attracting and retaining more residents, but also on connecting people from all backgrounds and communities to quality education and training, and to career pathways that lead to employment with upward mobility and long-term financial stability.



Photo Credit: Visit Buffalo; Photo by Leslie Zemsky

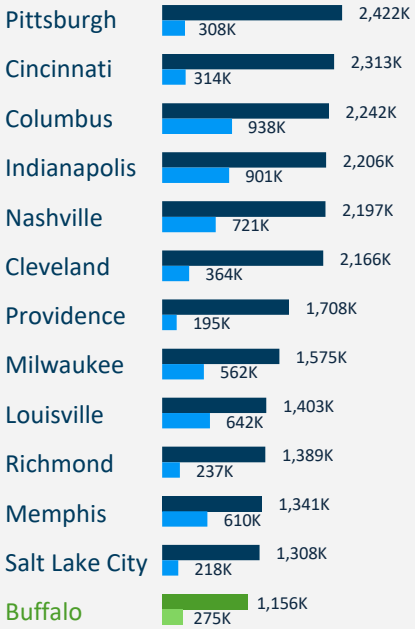
REGIONAL CHARACTER AND POPULATION

The Buffalo Niagara Region

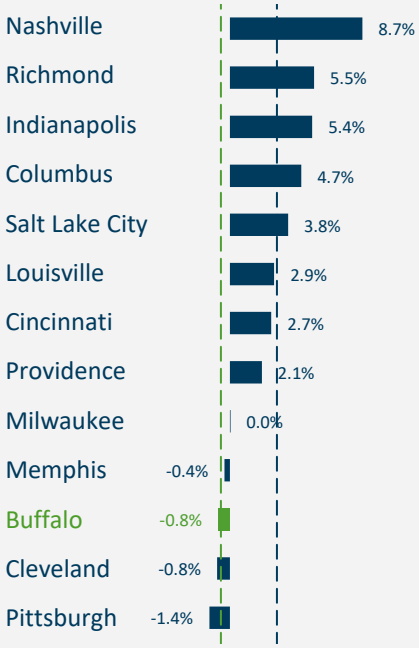
The Buffalo Niagara region is a two-county metropolitan area (Erie and Niagara counties) on the US-Canada border, centered on the cities of Buffalo and Niagara Falls. **Home to more than 1.15 million residents**, the region is culturally and geographically diverse, encompassing distinct urban neighborhoods, historic industrial districts, suburban communities, rural, agricultural landscapes, and the world-renowned Niagara Falls.

Among its 12 benchmark regions, Buffalo Niagara ranks last in total population and 11th in both population growth (-0.8%) and working-age population growth (-3.9%) since 2020. However, the region is projected to reverse this decline and grow 0.7% through 2035 (ninth of 13), a more positive outlook for attracting and retaining residents.

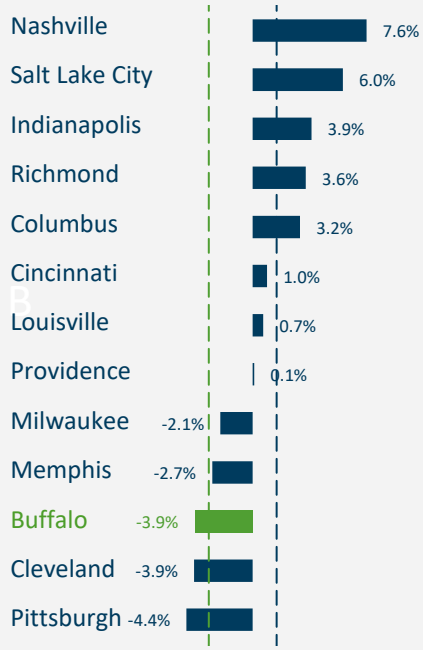
Total Population, MSA and Core City, 2025



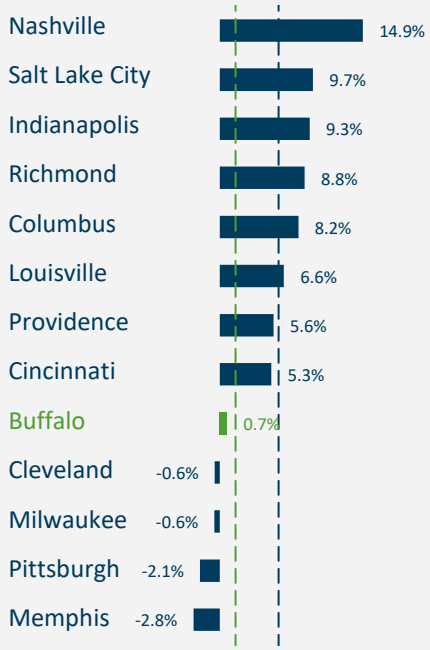
Population Growth, 2020-2025



Working Age (16-64) Population Growth, 2020-2025



Projected Population Growth, 2025-2035



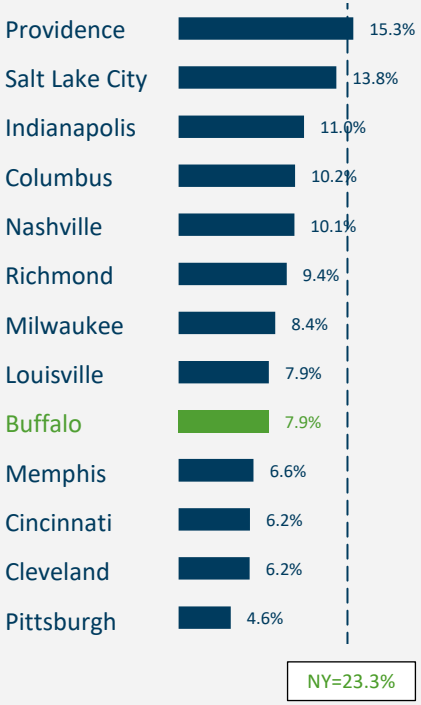
Source: Census Bureau, Population Estimates; Lightcast

NY - - - US - - -

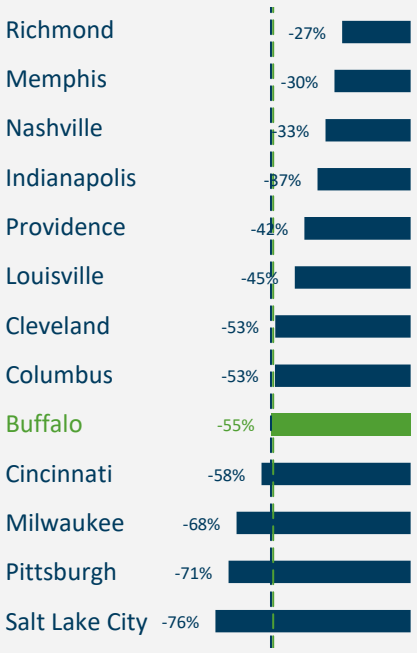
INTERNATIONAL RESIDENTS

International residents have long been an important part of Buffalo Niagara's population, and international migration has had a positive effect on regional workforce growth. **A recent decline in newcomers from outside the US may reflect broader national trends and shifts in federal immigration policy.**

Share of Population: Foreign-born, 2024



Change in International Migration, 2024-2025



Source: Census Bureau, American Community Survey and Population Estimates

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At 7.9%, Buffalo Niagara's share ranks ninth of 13, just below the middle alongside Louisville. International migration fell 55%, matching the national decline and limiting future population growth.

Photo Credit: Visit Buffalo; Photo by Drew Brown

HOUSEHOLD INCOME AND FINANCIAL STANDING

Buffalo Niagara trails most peers on household financial standing: median household income ($72,300) ranks 12th of 13 and median earnings ($47,200) 10th. Its 12.9% poverty rate is the second-highest, and Black and Hispanic households earn just 57% and 70% of White household income.

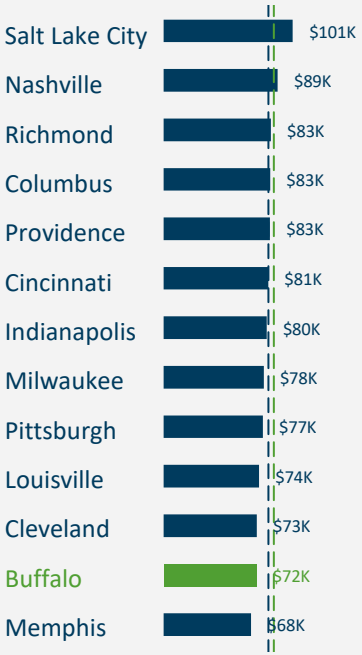
Buffalo Niagara's median annual earnings ($47,200) ranks 10th of 13

Median Earnings

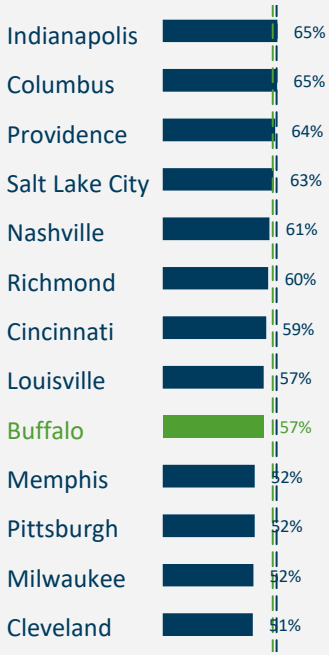


Buffalo Niagara's median household income ($72,300) ranks 12th of 13, ahead of only Memphis. Black and Hispanic households earn 57% and 70% of White income (ninth and 11th), underscoring the need for more inclusive growth

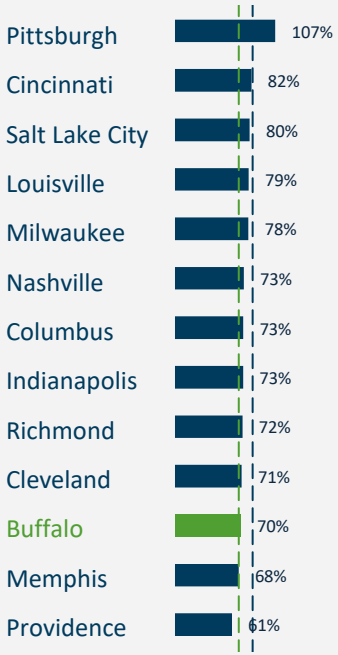
Median Household Income



Median Household Income: Black as % of White

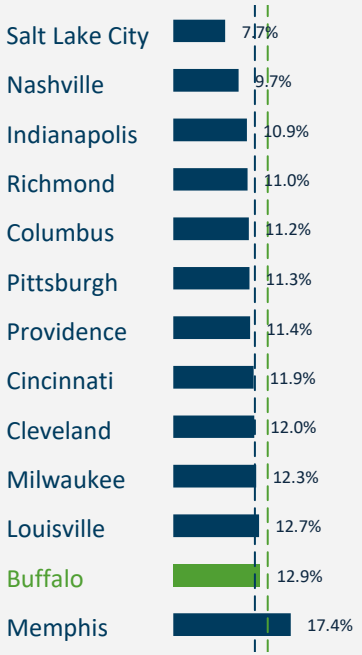


Median Household Income: Hispanic as % of White



Although the region ranks 12th in poverty (12.9%), its rate is within 2 percentage points of most peers.

Poverty Rate



Source: Census Bureau, 2024 American Community Survey

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ECONOMY

Buffalo Niagara's economy is at a critical inflection point. While the region has generated substantial employment and economic output growth since 2020, those gains have not translated into stronger wage growth or a broader expansion of the employer base. Compared with peer regions, Buffalo Niagara has posted solid gains in jobs and gross regional product, outperforming several industrial competitors, yet average wages are near the bottom of the benchmark group and have declined over the past five years. New establishments are also creating slightly more jobs than business closures eliminate, indicating modest levels of market entry by new firms and continuing entrepreneurial activity. However, the region stands alone among its peers in experiencing a net decline in the overall number of business establishments, which could be a significant barrier for future growth if not reversed.

For Buffalo Niagara, there seems to be an opportunity to build a more robust approach to economic development that balances business attraction and expansion that translates into heightened economic benefits for residents. Beyond simply increasing the number of companies and creating more jobs, the region has an opportunity to foster an economy where industry thrives and employment leads to higher-wage employment and a more broadly shared prosperity.

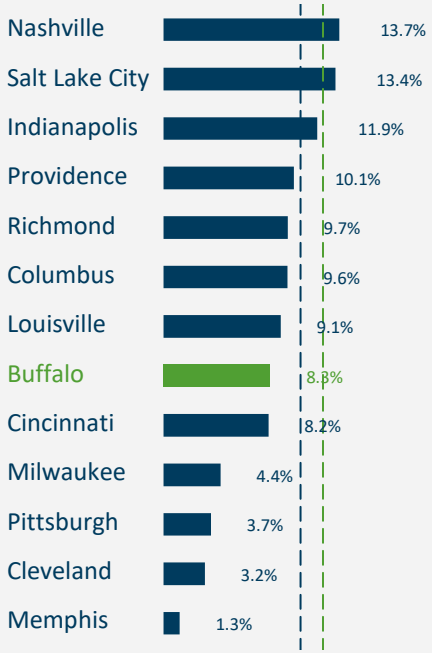


REGIONAL ECONOMIC GROWTH AND VALUE

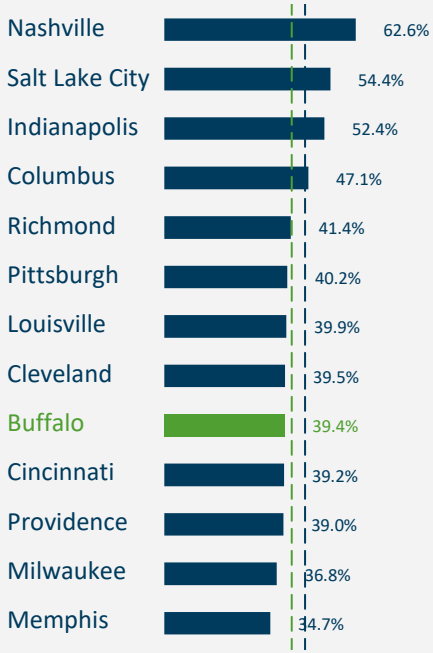
Buffalo Niagara's job growth (eighth of 13) and Gross Regional Product (GRP) growth (ninth) placed it mid-pack among peers but below NY and US rates. Goods exports ($4,527 per capita, ninth) also trail state and national levels. **Buffalo Niagara is the only peer region where business establishments declined (−1.6%), signaling a need for enhanced efforts to advance future economic development and value creation.**

At 8.3% job growth and 38.4% GRP growth, Buffalo Niagara outpaces several peers, including Cincinnati, Milwaukee, and Memphis. However, a 1.6% drop in establishments, last among peers, signals a need for expanded business attraction, retention, and expansion efforts.

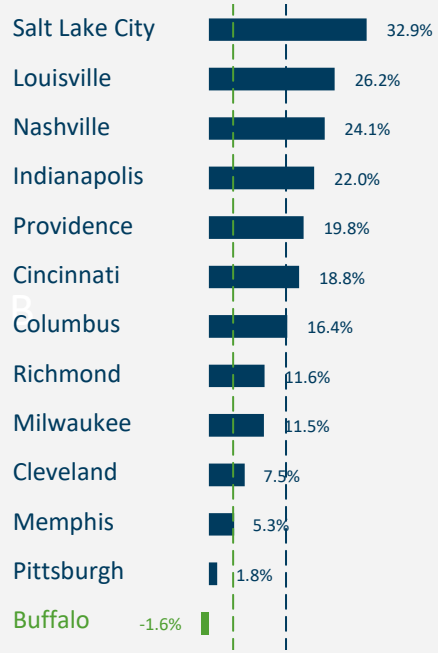
Job Growth, 2020-2025



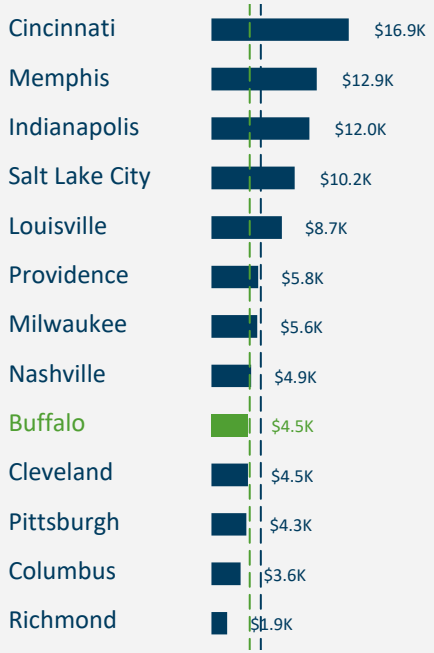
GRP Growth, 2020-2025



Establishments Growth, 2020-2025



Value of Goods Exports per capita, 2024



Source: Lightcast; International Trade Administration

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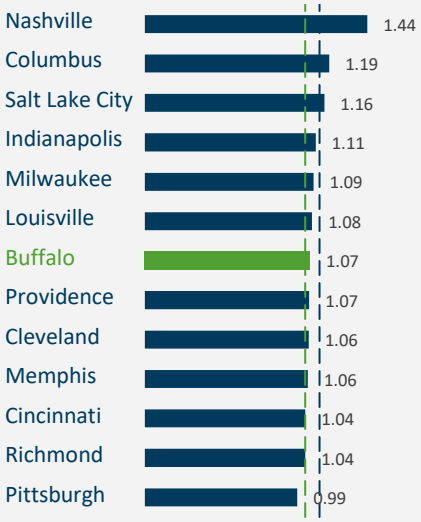
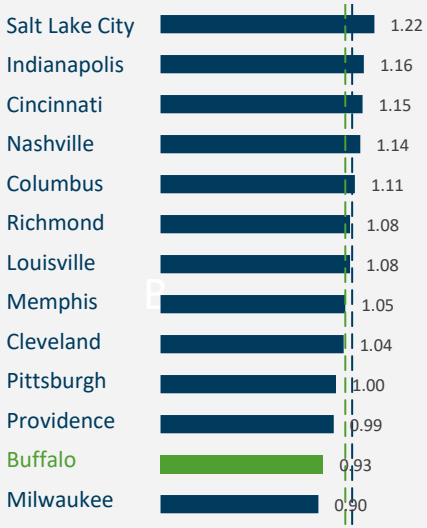
BUSINESS DYNAMICS

Buffalo Niagara ranks seventh among its 12 peers on business openings, adding 1.07 jobs at new establishments for every job lost to closures, behind leader Nashville (1.44) and the US (1.19). Among existing firms, Buffalo Niagara ranks 12th at 0.93, a net loss of roughly 3,000 jobs a year. **Helping established employers retain and expand is key to regional job growth.**

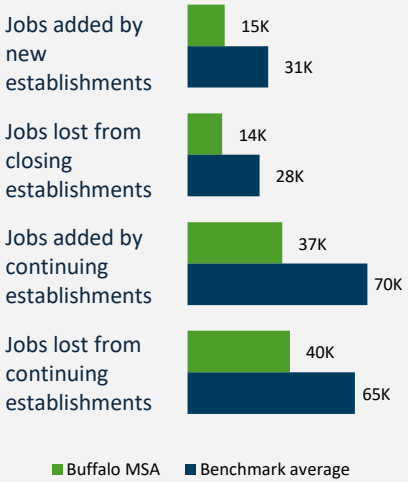
Ratio of jobs added by new establishments vs. jobs lost by closed establishments, 2019-2023 avg



Ratio of jobs added vs. lost by existing continuing establishments, 2019-2023 avg



Number of Jobs Added vs. Lost by Establishment Type, 2019-2023 avg



Source: Census Bureau, Business Dynamics Statistics

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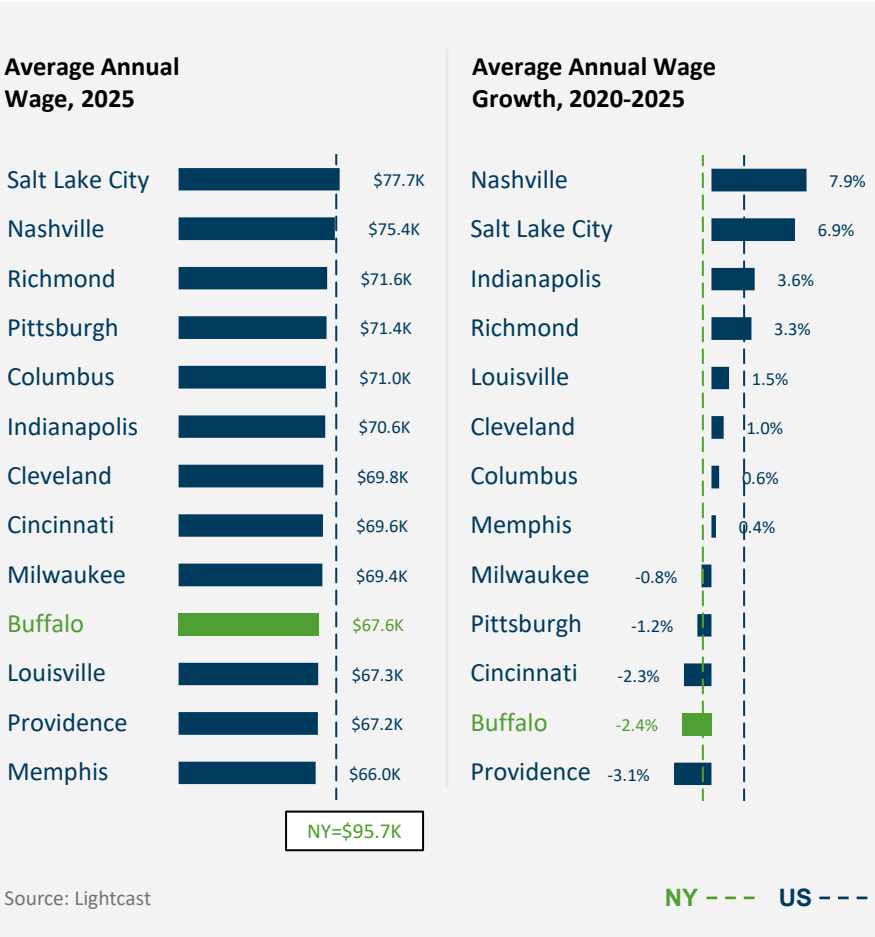
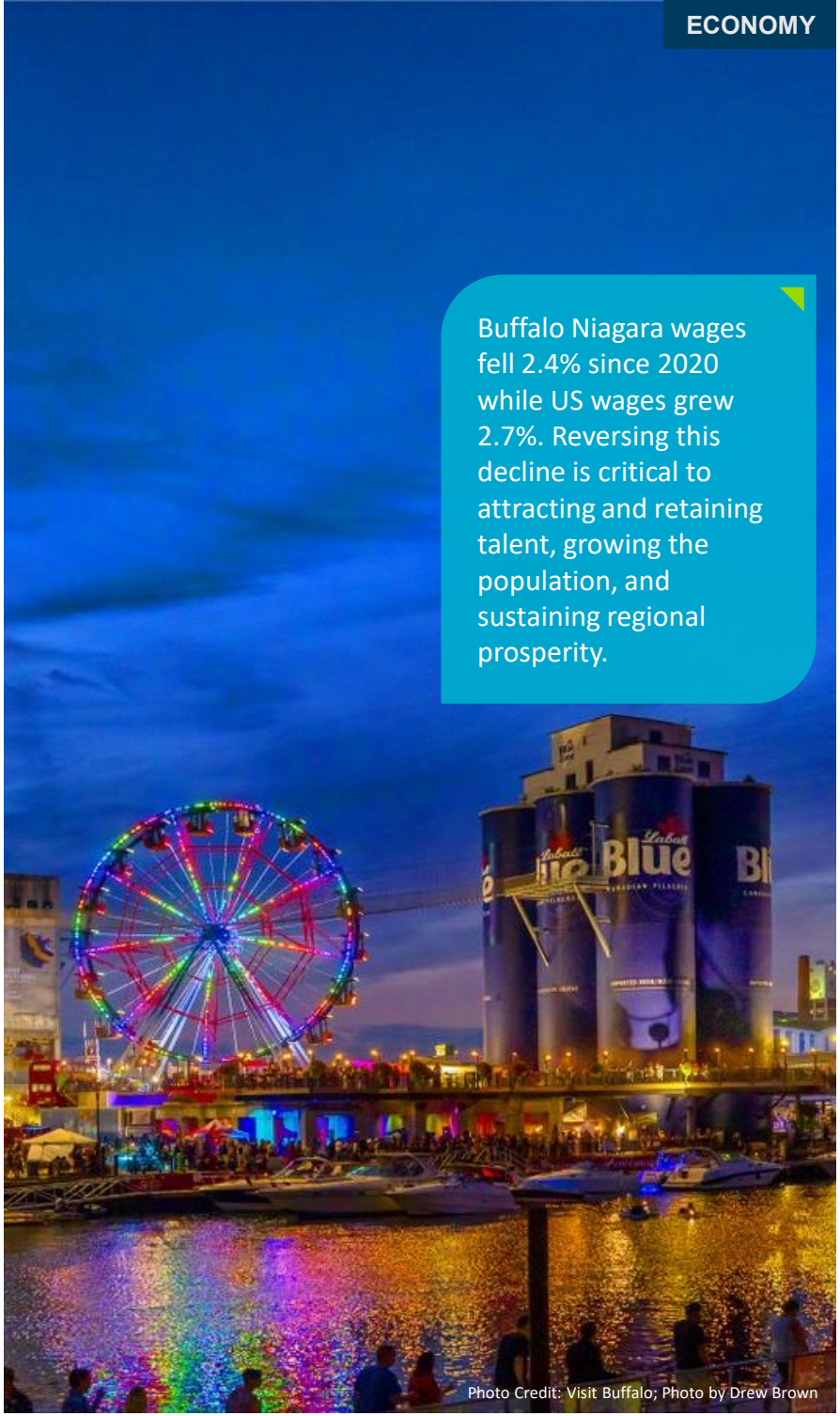
In Buffalo Niagara and across benchmark regions, existing businesses represent ~70% of jobs added and lost

WAGE AND INCOME GROWTH

Buffalo Niagara's economy has long supported a favorable quality of life for residents and families. Yet its 2025 average wage of $67,551 ranks 10th among its 12 peer metros, and wages fell 2.4% from 2020 to 2025 (12th of 13). **Economic growth must translate into higher earnings for workers.**



Source: Lightcast



INNOVATION AND ENTREPRENEURSHIP

Innovation and entrepreneurship will play an increasingly important role in Buffalo Niagara's ability to compete in a technology-driven economy. The region benefits from a strong foundation of research institutions and university-led R&D activity, ranking near the middle of its peer group in research investment and above national averages. Yet those research strengths have not consistently translated into new business creation, patent activity, or venture-backed growth. Buffalo Niagara ranks last among benchmark regions in business applications per capita and trails many peers in patents and venture capital investment, suggesting that the pathway from innovation to commercialization remains underdeveloped.

These dynamics point to a significant opportunity for the region. Nationally, regions that successfully convert research, talent, and industry expertise into startups and high-growth firms tend to generate stronger productivity, job creation, and long-term economic growth. Buffalo Niagara's challenge is less about creating new innovation assets and more about activating the assets already in place. Strengthening connections among universities, entrepreneurs, investors, and established employers could help accelerate business formation, increase commercialization of research, and foster a more dynamic economy. The region's next chapter of growth will depend not only on generating new ideas, but also on creating the conditions that allow those ideas to become successful companies, generate quality jobs, and create lasting economic value.

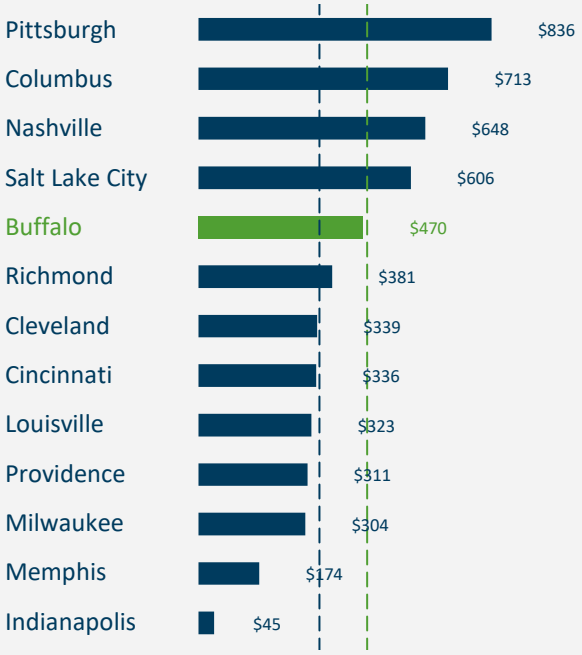


Photo Credit: Visit Buffalo; Photo by Katie Addo

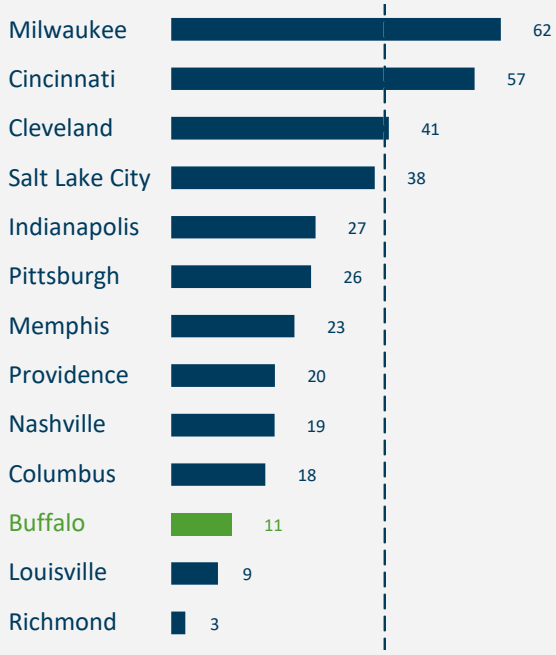
R&D AND INNOVATION INVESTMENT

Buffalo Niagara ranks fifth among its 12 peers in university R&D per capita ($470), above the US average and trailing leader Pittsburgh ($836). Commercialization lags that research base: Buffalo Niagara ranks 11th in patents (11 per 100,000 vs. roughly 40 for NY and the US) and 10th in VC investment ($95 per capita vs. Salt Lake City's $685). **Turning research strength into patents and venture-backed startups is a key regional opportunity.**

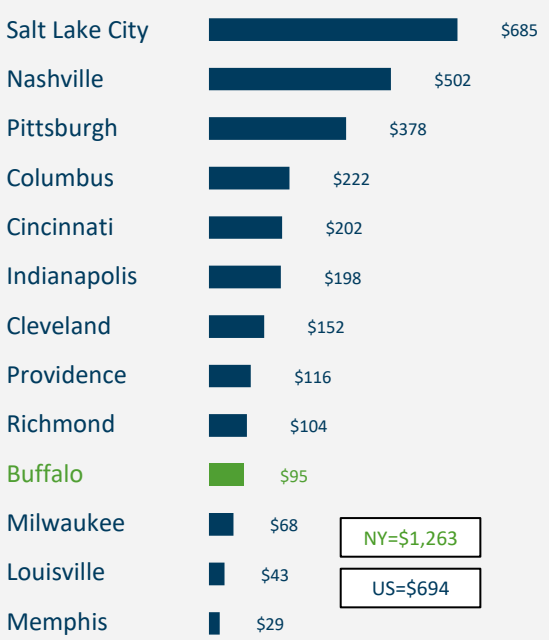
University R&D per capita, 2024



Patents Assigned per 100,000 Population, 2025



VC Investment per capita, 2023-2025 average



Source: National Science Foundation; US Patents and Trademarks Office; PitchBook; Census Bureau, Population Estimates.

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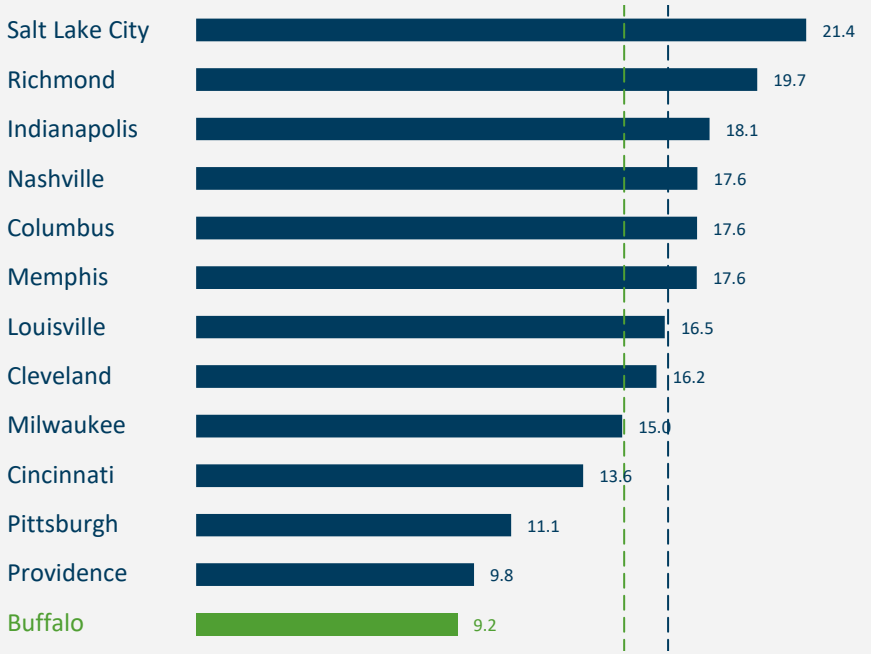
ENTREPRENEURSHIP AND BUSINESS FORMATION

Entrepreneurship is a major opportunity for Buffalo Niagara. At 9.2 business applications per 1,000 residents in 2025, the region ranks last among 12 benchmark metros, at less than half the rate of leader Salt Lake City (21.4). **Stronger startup and small business support could expand innovation, diversify the economy, and generate future jobs.**

Business Applications per 1,000 Population



Source: Census Bureau, Business Formation Statistics, 2025

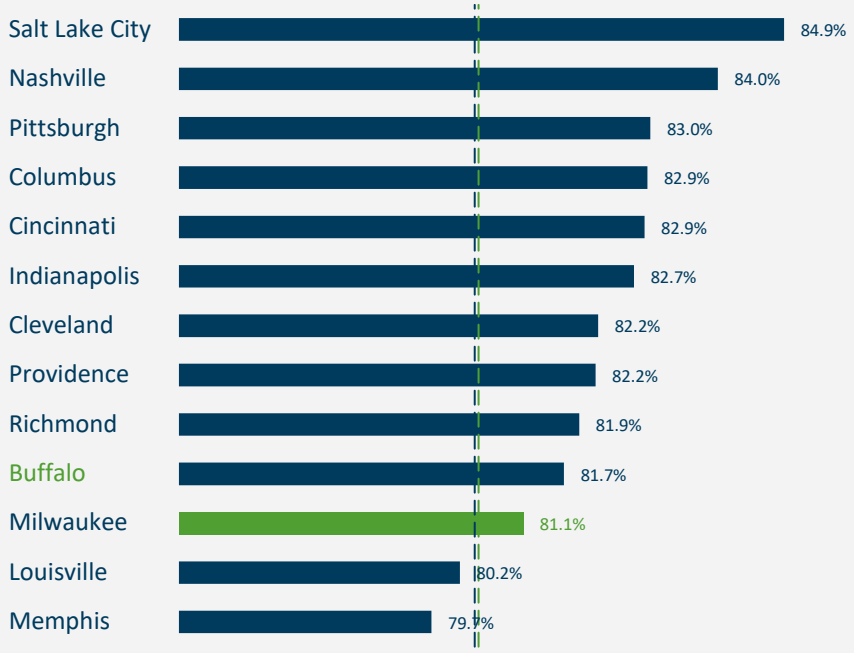


TALENT AND WORKFORCE

Talent remains one of Buffalo Niagara's most important competitive assets and one of its most pressing economic challenges. With a relatively low labor force participation among working-age adults, Buffalo Niagara's ability to compete and grow will depend largely on how effectively it develops, attracts, retains, and connects talent to quality employment opportunities. The region benefits from a strong higher education ecosystem that produces more degree graduates and STEM graduates per capita than any of its benchmark peers, providing a significant foundation for future workforce needs. Yet this educational strength is offset by persistent talent leakage, as the region continues to experience net domestic outmigration, particularly among college-educated individuals. International migration has helped replenish and diversify the workforce, but it has not fully compensated for the loss of residents to faster-growing regions.

These trends highlight both a challenge and an opportunity for Buffalo Niagara. The region is succeeding at producing talent but is less successful at converting that talent into long-term workforce and population growth. At the same time, the comparatively low rate of certificate and short-term credential attainment suggests an opportunity to better align workforce development with employer needs, particularly in high-demand technical and skilled occupations. Buffalo Niagara's next chapter will depend not only on educating more people, but also on creating the economic opportunities, career pathways, and quality-of-life advantages that encourage graduates, skilled workers, and new residents to build their futures in the region.

Labor Force Participation, Age 25-64



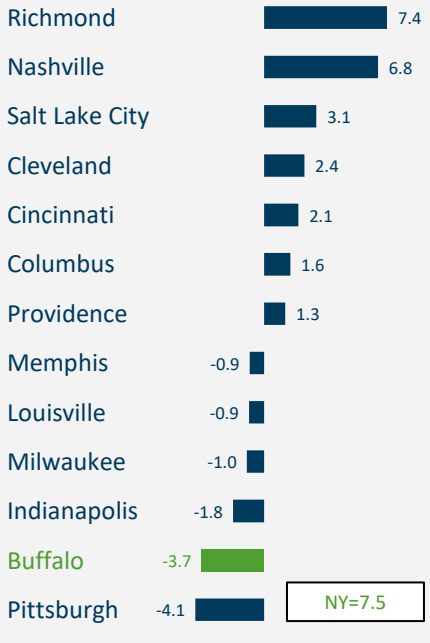
Source: Census Bureau, 2024 American Community Survey

TALENT MIGRATION

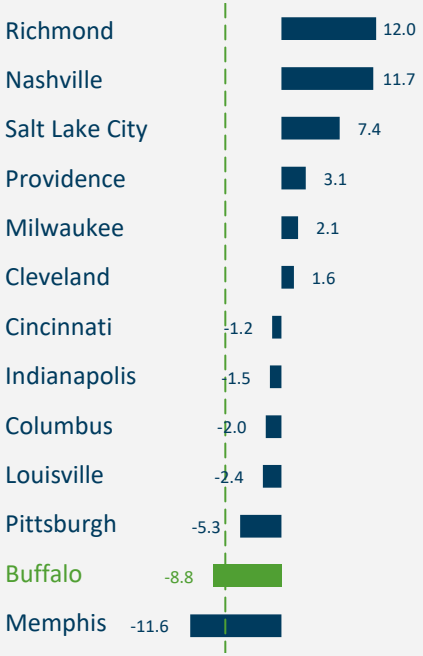
Buffalo Niagara ranks 12th of 13 in net domestic migration (-3.7 per 1,000) and 12th for bachelor's degree holders (-8.8), while Richmond and Nashville lead. International arrivals offset these losses: Buffalo Niagara ranks sixth in gross international in-migration (4.9 per 1,000) and second for bachelor's+ (7.3), behind only Salt Lake City. **Attracting and retaining global talent is a key lever for regional growth.**

International immigration has been an important source of population growth for the Buffalo Niagara region, especially for people with a bachelor's degree or higher. However, immigration levels in the region as well as the US fell 55% from 2024 to 2025, presenting a significant challenge.

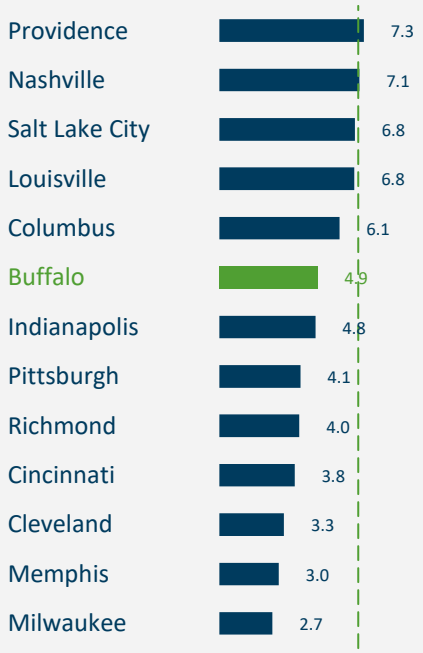
Net Domestic Migration per 1,000 Population



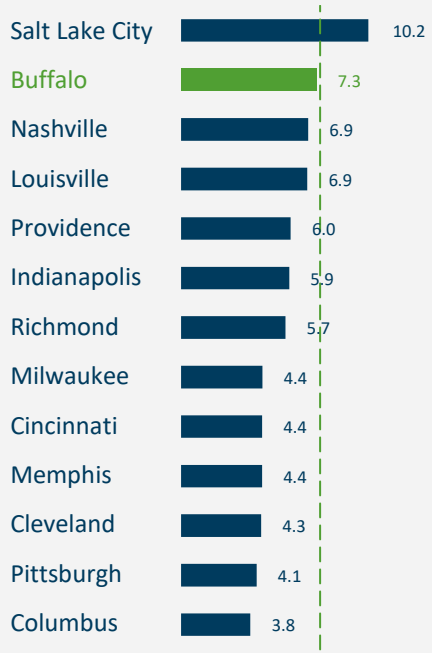
Net Domestic Migration of People with Bachelor's Degree+ per 1,000 Population



Gross International In-Migration per 1,000 Population



Gross International In-Migration of People with Bachelor's+ per 1,000 Population



Source: Census Bureau, 2024 American Community Survey. Note: Denominator for migration of people with bachelor's degree+ is 1,000 population with bachelor's degree+.

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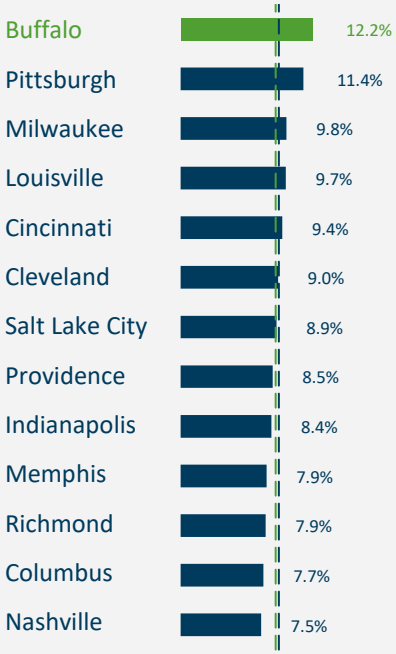
EDUCATIONAL ATTAINMENT

Buffalo Niagara ranks 1st of 13 peer metros in associate's degree attainment (12.2% of adults 25-64), well above the U.S. (9.1%). It ranks 6th for bachelor's degree or higher (41.8%), above the U.S. (38.7%) but behind leaders Nashville (46.0%) and Richmond (45.1%). **A strong middle-skills base is a regional asset; closing the four-year degree gap is the next opportunity.**

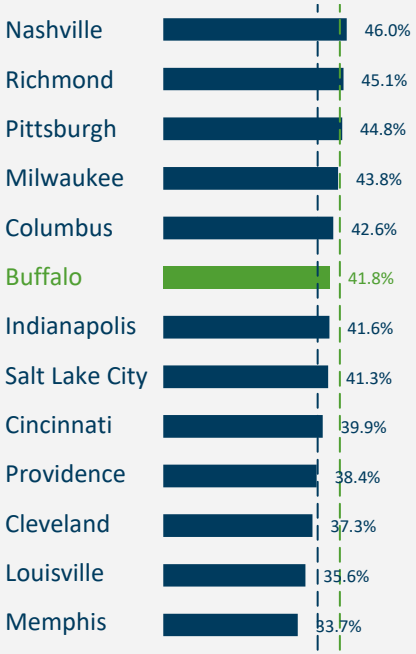


Photo Credit: Visit Buffalo; Photo by Nancy J. Parisi

Share of Adults Ages 25-64 with Associate's Degree



Share of Adults Ages 25-64 with Bachelor's Degree +



Source: Census Bureau, 2024 American Community Survey.

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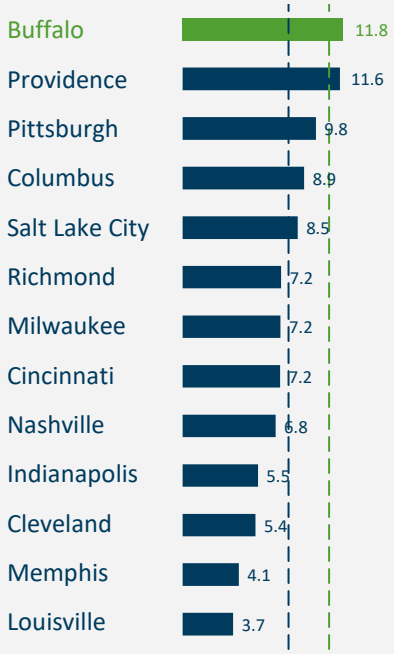
ON-CAMPUS CREDENTIAL COMPLETIONS

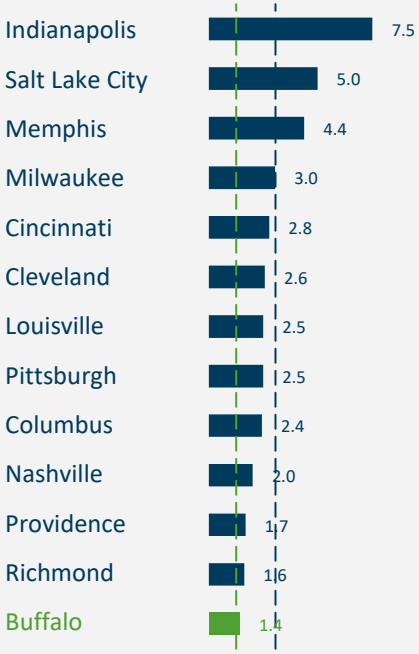
Buffalo Niagara ranks first among its 12 peer metros in degree completions (11.8 per 1,000 residents) and in STEM degrees (5.5), ahead of Salt Lake City and Pittsburgh. Certificates are the gap: Buffalo Niagara ranks last in both total (1.4) and STEM (0.6) certificate completions, well behind leader Indianapolis (7.5 and 5.5). **Expanding short-term credentials would complement the region's degree strength and produce more job-ready talent.**

Buffalo Niagara leads its peers in overall and STEM degree completions but lags in credential completions which can help individuals upskill and reskill for changing labor market needs.

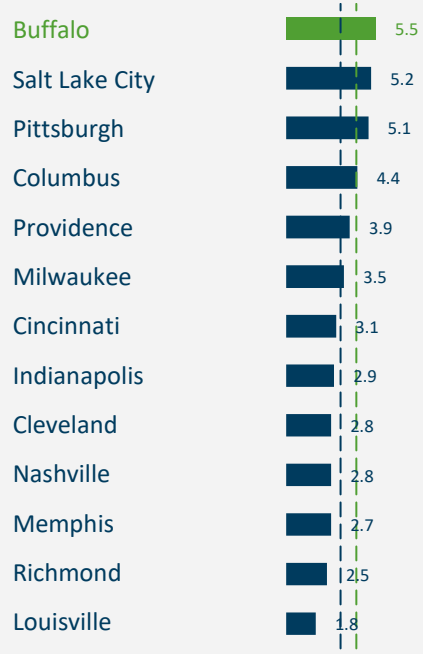
Degree Completions per 1,000 Population



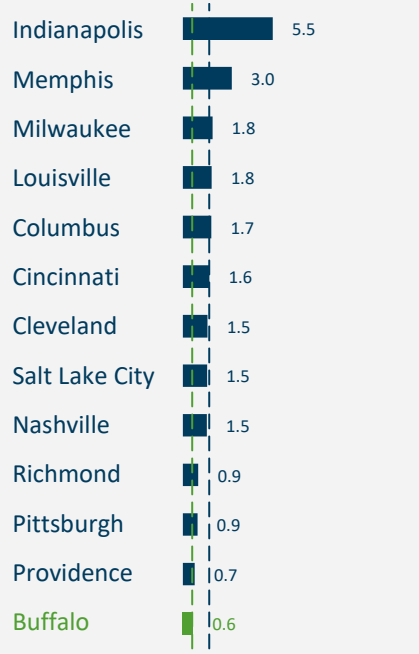
Certificate completions per 1,000 Population



STEM Degree Completions per 1,000 Population



STEM Certificate Completions per 1,000 Population



Source: Lightcast, 2025. Note: On-campus completions only; online completions excluded.

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HOUSING AND COMMUNITY

Housing is both a competitive advantage and a growing challenge for Buffalo Niagara. Compared with many peer regions, the region remains relatively affordable, with lower home values, rents, and housing cost burdens than many benchmark metros. These affordability advantages have likely contributed to increased demand, as Buffalo Niagara has experienced some of the fastest home value appreciation among its peers in recent years. At the same time, new housing construction has lagged significantly behind other regions, raising concerns about whether the housing supply can keep pace with future demand and economic growth.

The region's long-term competitiveness will depend on its ability to preserve affordability while expanding access to quality housing opportunities. Buffalo Niagara benefits from high rates of homeownership and comparatively low levels of housing cost burden, but rising housing costs and persistent disparities in homeownership by race suggest that not all residents are benefiting equally from these strengths. As employers seek to attract and retain talent, housing availability, affordability, and neighborhood stability will become increasingly important economic development issues. Ensuring that existing residents can remain in their communities while creating new housing options for future workers and families will be critical to supporting population growth, workforce attraction, and broadly shared prosperity across Buffalo Niagara.



Photo Credit: Visit Buffalo;
Photo by Mark Mulville

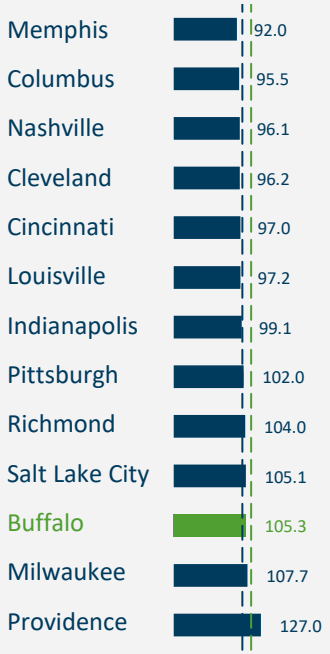
COST OF LIVING AND HOMEOWNERSHIP

At 105.3, Buffalo Niagara's cost of living ranks 11th among its 12 peers, above the US average of 100. Homeownership is a strength: Buffalo Niagara's 68.8% rate ranks third, behind only Pittsburgh (71.0%) and Louisville. Yet ownership gaps persist: Buffalo Niagara ranks eighth for Black residents (33.8%), 12th for Hispanic residents (31.9%) and 10th for Asian residents (12.2%), a barrier to shared regional prosperity. **Buffalo Niagara's quality of life story is nuanced and has positives and challenges to point to.**

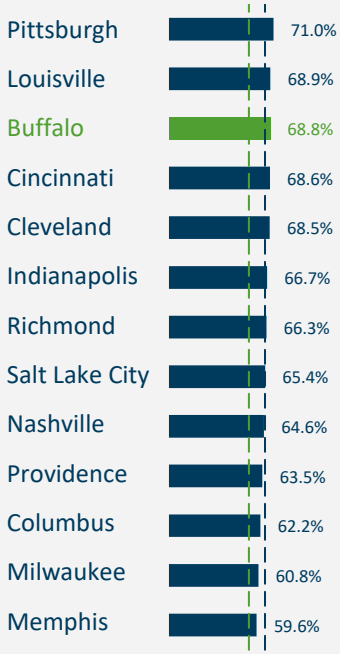
68.8% homeownership:
third-highest among benchmarks

Despite high homeownership overall,
there are large gaps by race

Cost of Living Index

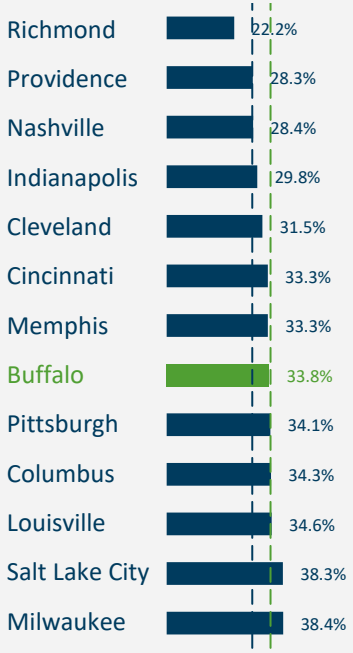


Homeownership Rate

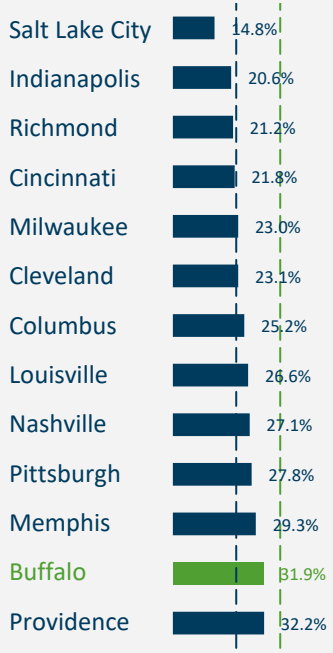


Gap in Homeownership Rate (relative to White residents)

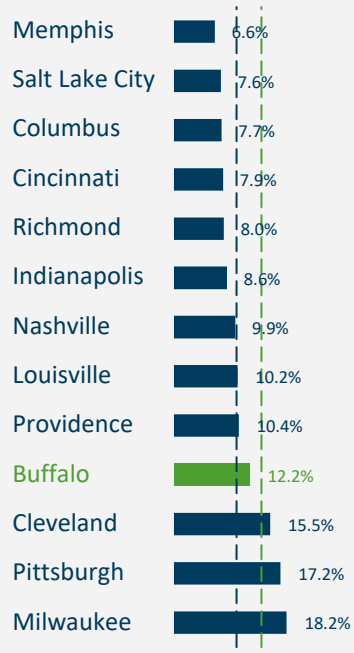
Black Residents



Hispanic Residents



Asian Residents



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Source: Lightcast, 2025; Census Bureau, 2024 American Community Survey.

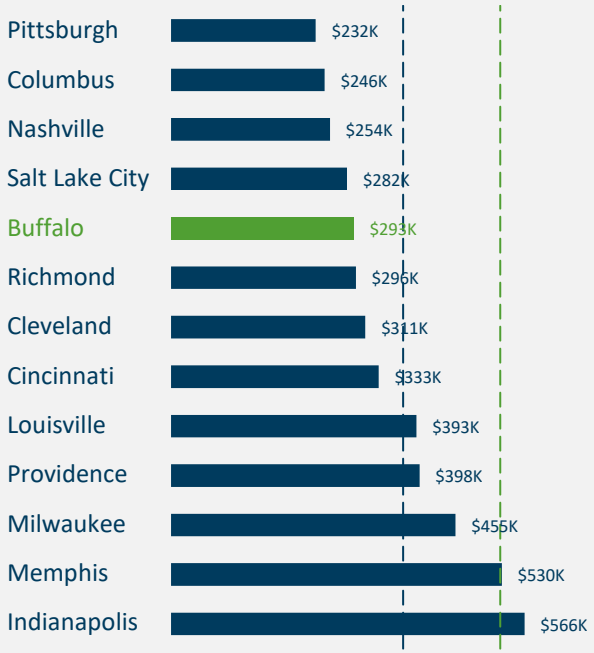
HOUSING VALUE AND PERMITTING

Buffalo Niagara led all of its 12 peer metros in housing value growth, up 32% from July 2021 to July 2026, yet its typical home value of about $293,000 ranks ninth and remains below the US ($371,774). Permitting lags: Buffalo Niagara issued just 2.7 units per 1,000 existing homes in 2025, last among peers and far behind Nashville (20.2).

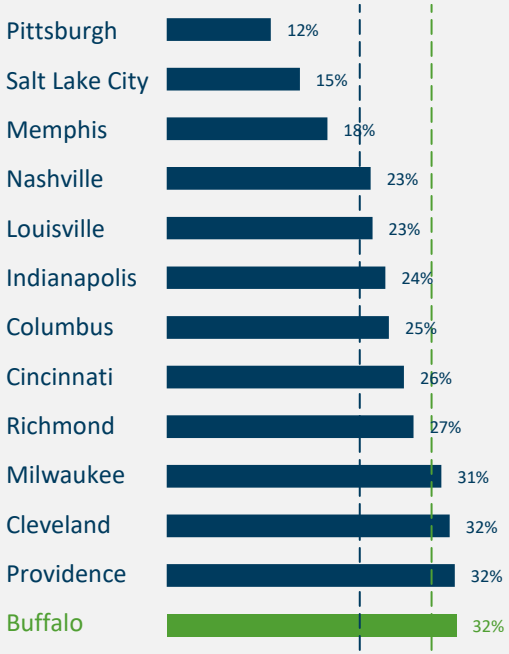
Expanding housing supply will be key to preserving affordability.

Affordability appears to have attracted buyer interest, driving up prices

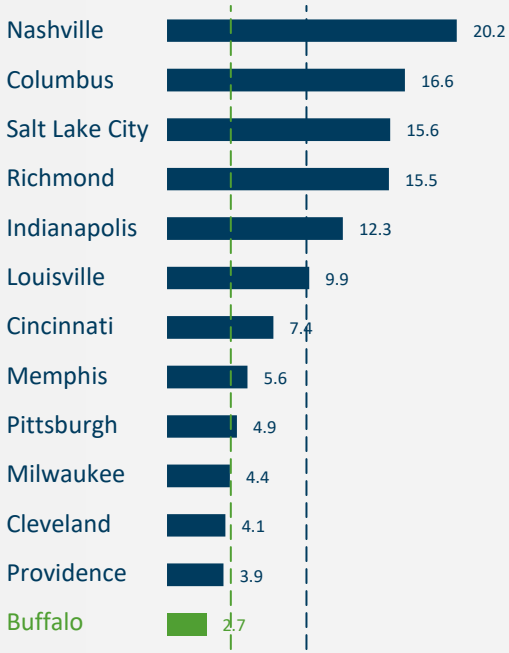
Housing Value (index), July 2026



Housing Value Growth, July 2021 to July 2026



Housing Units Permitted per 1,000 Existing Units, 2025



Source: Zillow Home Value Index; Census Bureau, Building Permits Survey.

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HOUSING AFFORDABILITY AND STABILITY

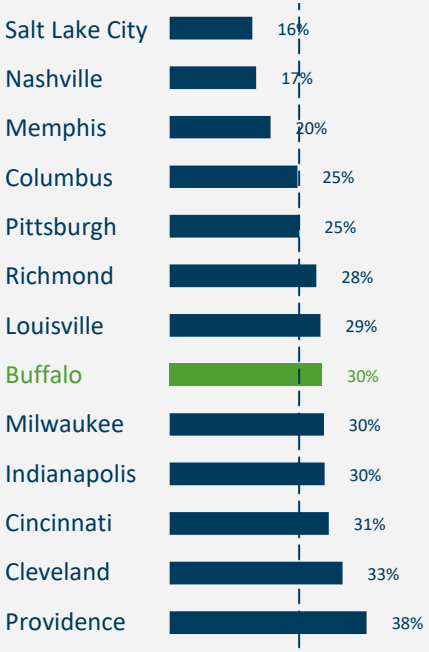
Buffalo Niagara's monthly rent ($1,446) is the third-lowest of its 12 peer metros, and its 28.2% housing cost-burden rate ranks fourth-lowest. Yet rents grew 29.5% since 2021 (eighth of 13), and a 3.6% mortgage delinquency rate ranks 10th, well behind leader Milwaukee (1.7%). **Affordability remains a regional advantage, but rising rents and payment stress warrant attention.**

A higher mortgage delinquency rate compared to many of the other benchmarks has a dampening effect on the region's housing advantages. As of Dec 2025, the delinquency rate in Buffalo Niagara was 1.7 percentage points higher than it was five years earlier, the third highest increase after Memphis (2.7) and Cleveland (2.0).

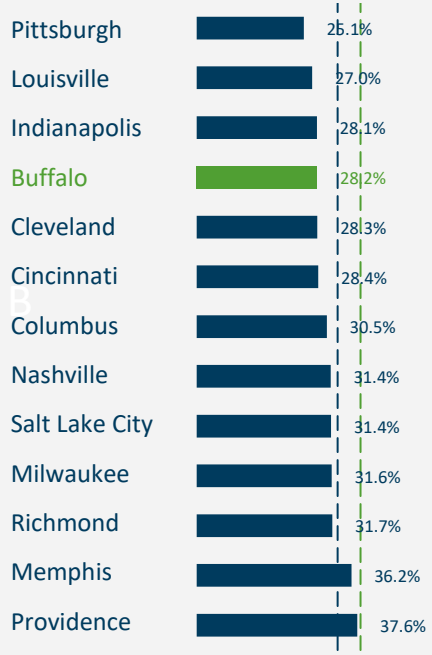
Monthly Rent (index), July 2026



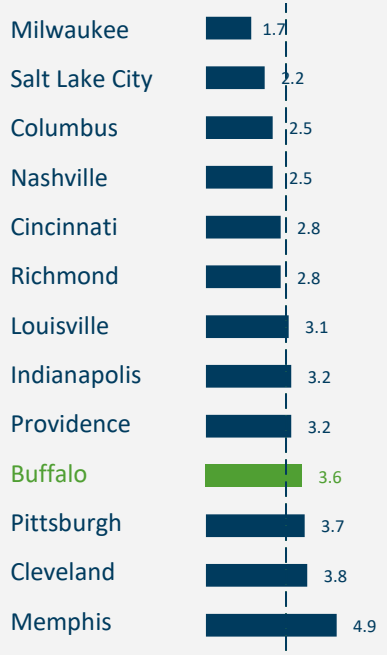
Monthly Rent Growth, July 2021 to July 2026



% of Households with Housing Costs 30% of Income, 2024



Mortgage Delinquency Rate, Dec 2025



Source: Zillow Observed Rent Index; Census Bureau, American Community Survey; Consumer Finance Protection Bureau.

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HEALTH AND WELLBEING

Health and wellbeing are essential contributors to both quality of life and economic competitiveness. Buffalo Niagara performs well on several measures of health access and affordability, including having the lowest share of adults without a healthcare provider among its peer regions and relatively low levels of food insecurity. These strengths provide a strong foundation for a healthy workforce and healthy communities.

At the same time, the region continues to face broader health challenges. Buffalo Niagara ranks closer to the middle of its peer group on measures such as obesity and self-reported health status, suggesting that access to care alone is not enough to produce better health outcomes. Improving community health, reducing barriers to healthy living, and ensuring that residents can fully participate in the workforce and civic life will remain important priorities for supporting long-term prosperity and quality of life across Buffalo Niagara.

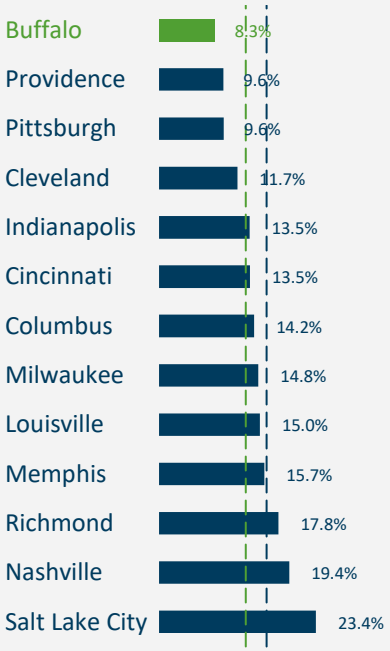


Photo Credit: Visit Buffalo; Photo by Rhea Anna

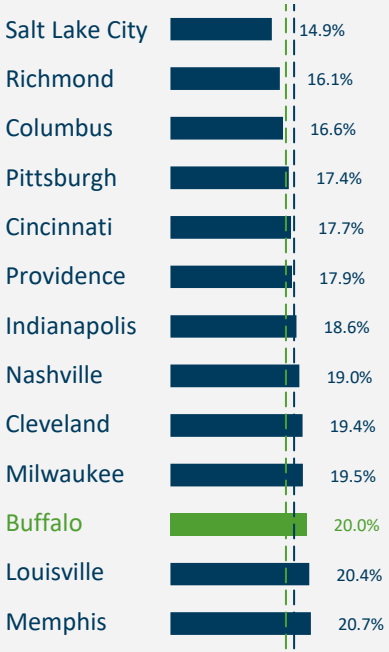
HEALTH AND WELLBEING

Buffalo Niagara leads all 12 peer metros on healthcare access and has just 8.3% of adults lacking a provider. The region also ranks fourth among benchmarks with a lower share of adults who are obese (32.8%) than the national average (34.3%) and lower levels of food insecurity (12.9% versus 14.4% US). However, **the higher share of adults reporting fair or poor health (20.0% vs. 18.2% US) indicates broader health needs that warrant attention.**

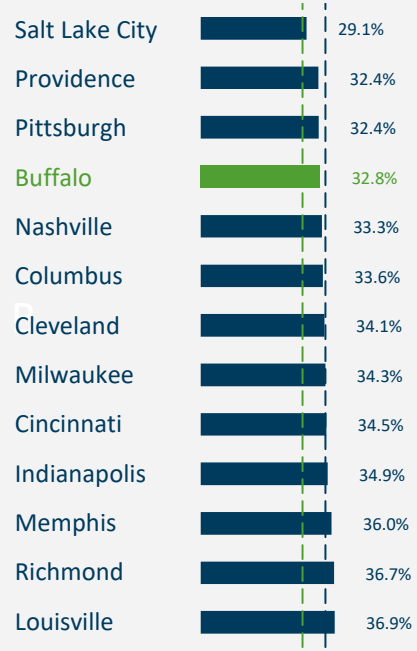
% of Adults who do not have a Health Care Provider



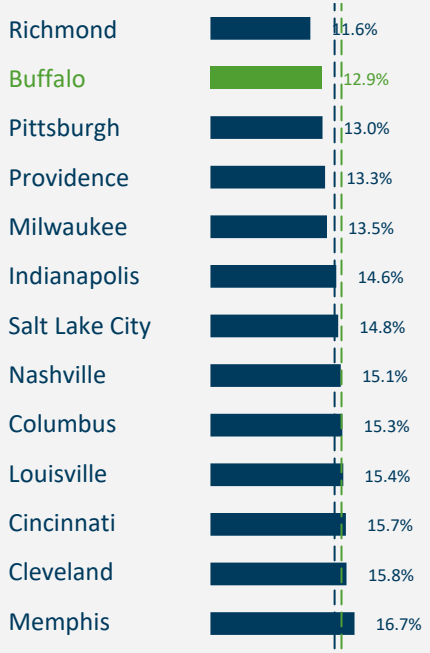
% of Adults Reporting Fair or Poor Health



% of Adults with BMI 30+



% of Population that is Food Insecure



Source: Centers for Disease Control, Behavioral Risk Factor Surveillance System, 2023

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TRANSPORTATION AND MOBILITY

Transportation is a notable quality-of-life and competitiveness advantage for Buffalo Niagara. The region benefits from short commute times, relatively low congestion, and transit ridership levels that compare favorably with many peer metros, helping residents access jobs, education, and services efficiently. These advantages support workforce mobility and contribute to the region's overall affordability and attractiveness.

As competition for talent and investment intensifies, transportation and mobility will play an increasingly important role in shaping regional competitiveness. Efficient transportation networks can expand labor market reach, increase access to opportunity, and enhance quality of life for residents. Buffalo Niagara's challenge is not simply maintaining its transportation advantages but leveraging them to support economic growth, attract new residents and businesses, and ensure that the benefits of regional prosperity are broadly shared.

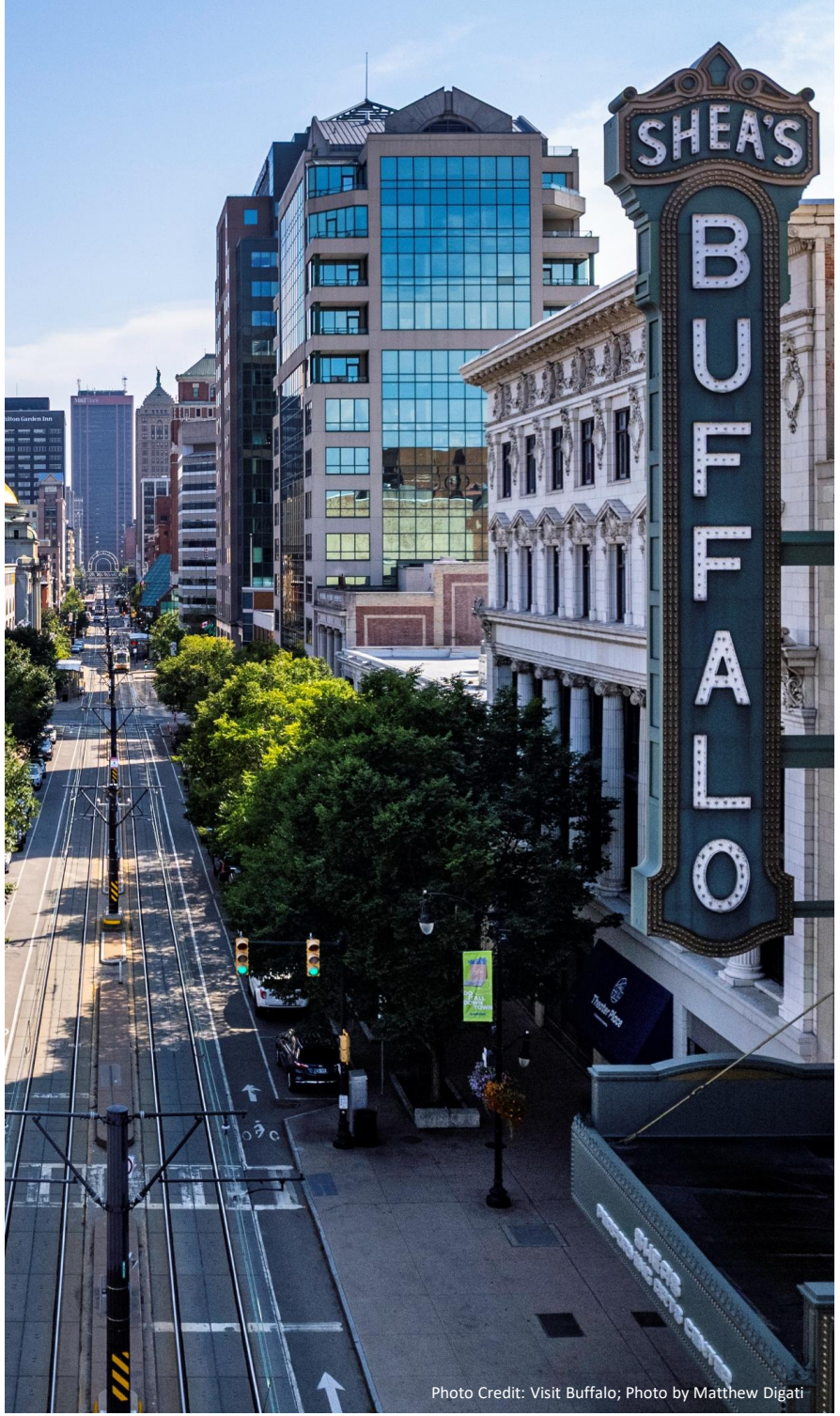


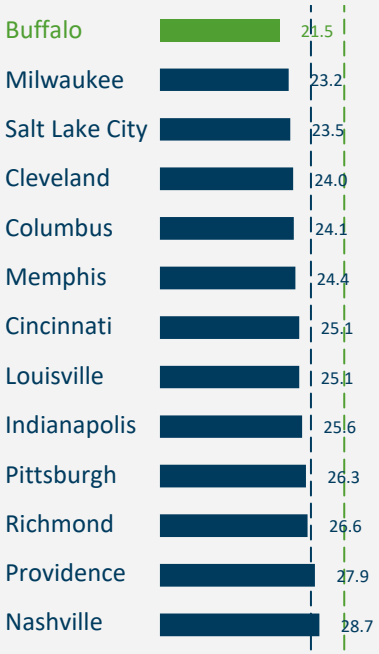
Photo Credit: Visit Buffalo; Photo by Matthew Digati

TRANSPORTATION CONNECTIVITY AND ACCESS

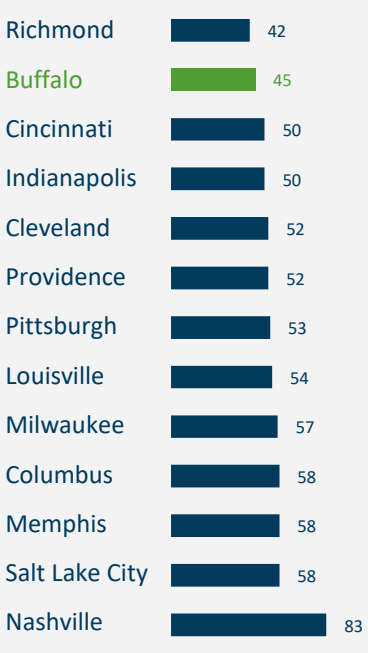
Buffalo Niagara's transportation network supports efficient mobility, but **ensuring reliable access to employment and services for residents without personal vehicles remains an important opportunity** for improving workforce connectivity and inclusive growth.

Buffalo Niagara has the shortest average commute among its 12 peer regions (21.5 minutes, ranking first), the second-lowest congestion delay (45 hours per auto commuter), and the third-lowest share of transit riders with 45+ minute commutes (34%). Yet it ranks 13th in households with a vehicle (90.1%), making reliable transit access to jobs a key priority.

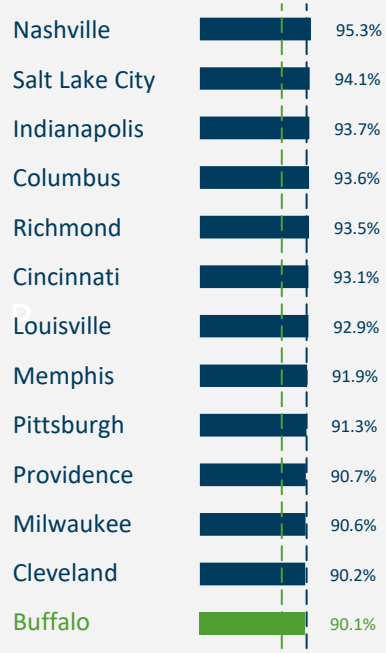
Average Travel Time to Work (minutes)



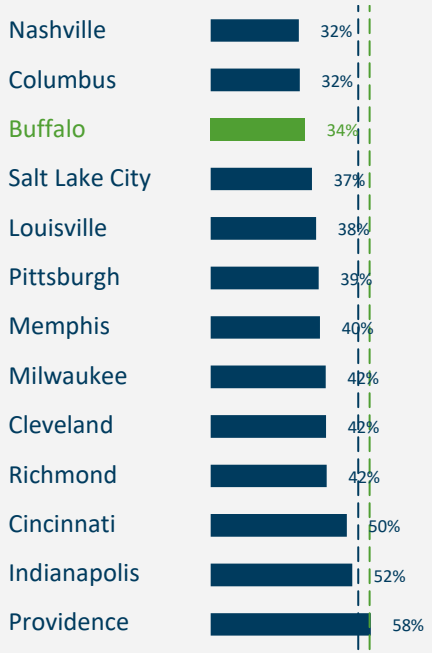
Annual Hours of Delay from Congestion per Auto Commuter



% of Households with at least 1 Vehicle



% of Public Transportation Commuters with a 45+ Minute Commute



Source: Census Bureau, 2024 American Community Survey; Texas A&M Transportation Institute, 2024.

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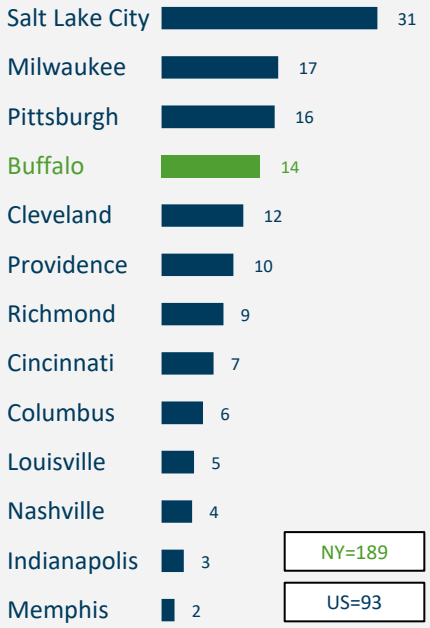
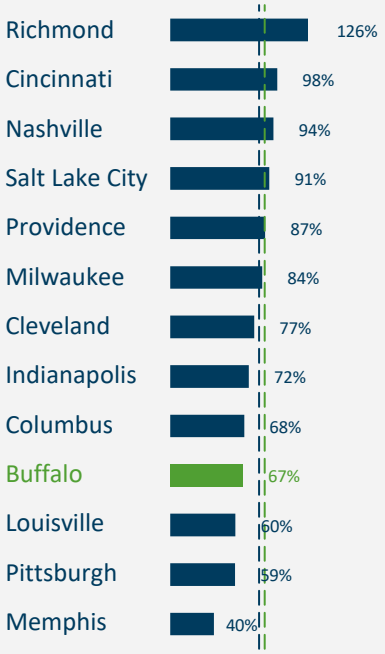
PUBLIC TRANSIT

Public transit connects residents to jobs, education, and services, and ridership reflects both network strength and post-pandemic travel patterns. **Buffalo Niagara ranks among the stronger transit markets in the peer group** on a per capita basis, but its ridership recovery since 2019 trails most peers.

Public Transportation Ridership per capita, 2025



Ridership in 2025 relative to 2019



Source: USDOT, Federal Transit Administration; Census Bureau, Population Estimates



INFRASTRUCTURE AND SITE READINESS

Infrastructure and site readiness are essential foundations for attracting investment and elevating regional competitiveness. Buffalo Niagara benefits from significant competitive advantages, including reliable energy systems, abundant water resources, and infrastructure capacity that compares favorably with many peer regions. These assets position the region well for future industrial expansion and business investment.

At the same time, the region has a relatively low levels of available office and industrial inventory, which may constrain its ability to capitalize on emerging opportunities. Expanding the inventory of development-ready sites and repositioning underutilized properties for productive use will be important to ensuring Buffalo Niagara can compete effectively for new investment and industry growth.

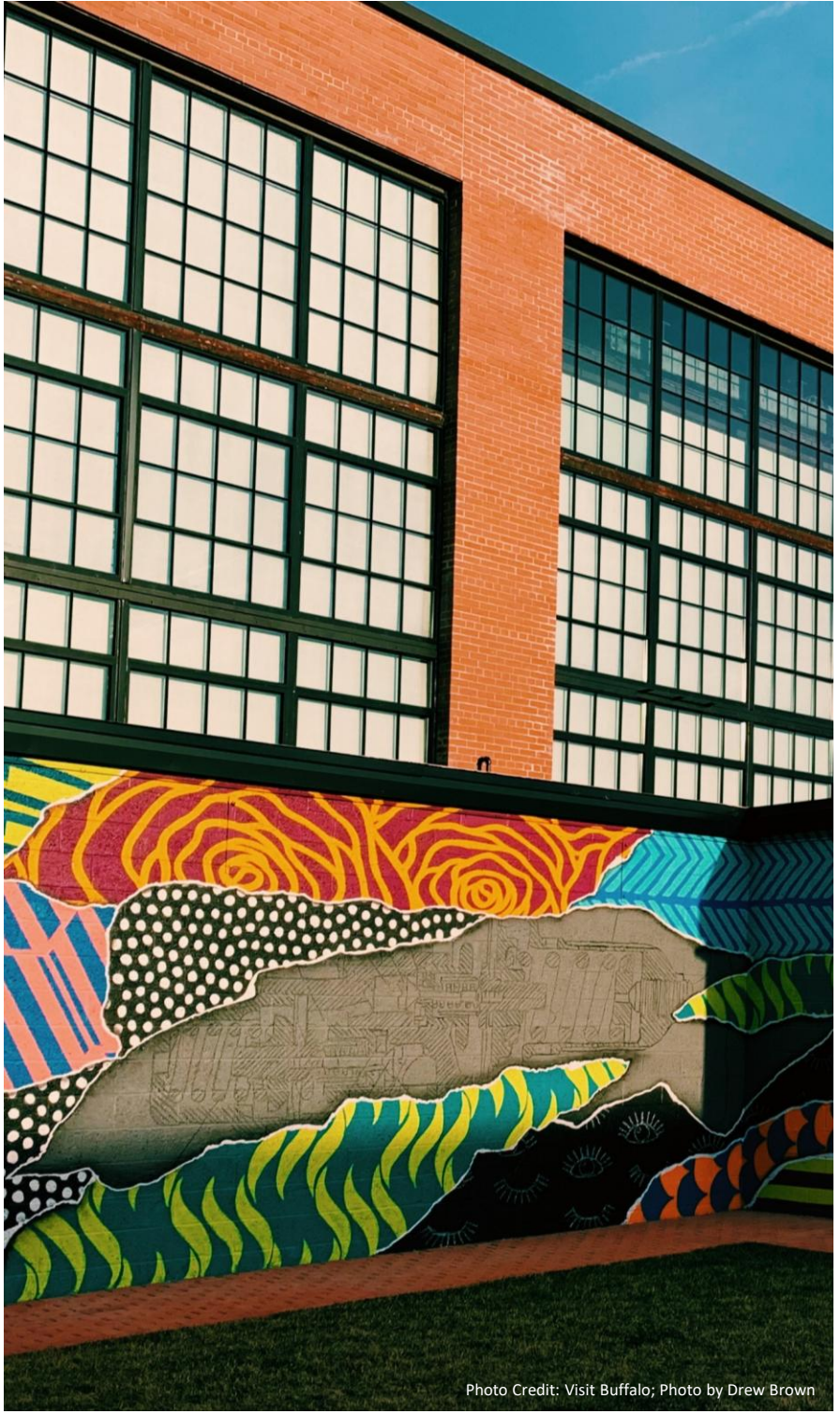


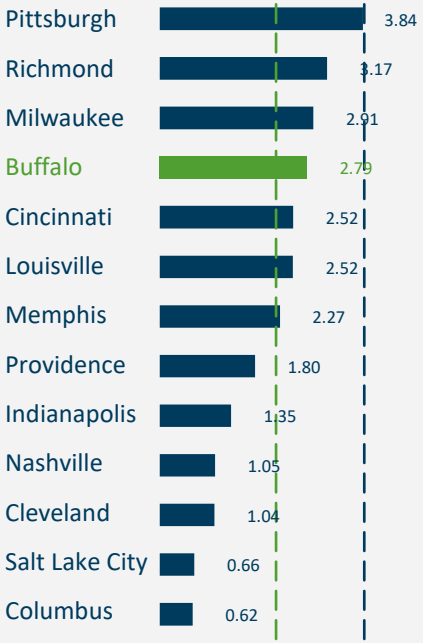
Photo Credit: Visit Buffalo; Photo by Drew Brown

INFRASTRUCTURE

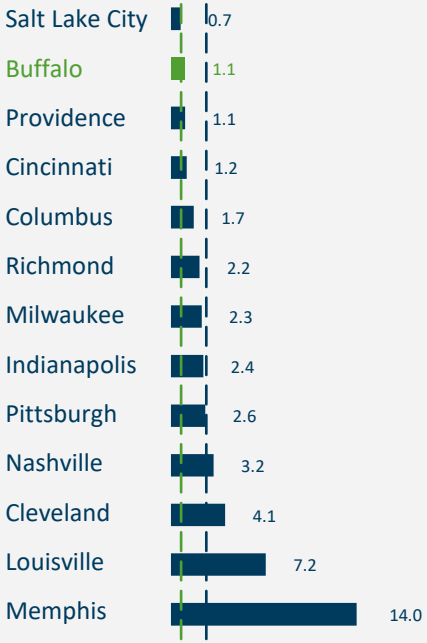
Infrastructure is a relative strength for Buffalo Niagara. The region has the second-lowest power outage burden among its 12 peers (1.1 consumer-hours per capita vs. 2.7 nationally) and ranks fourth on nameplate capacity (2.8 MW per 1,000) and fourth-lowest pressure on water supply (15.2). **Broadband is a gap:** at 77.6%, Buffalo Niagara ranks ninth, trailing leader Cincinnati (81.8%), making broadband a priority for digital competitiveness.

Natural resources provide the region with a competitive advantage

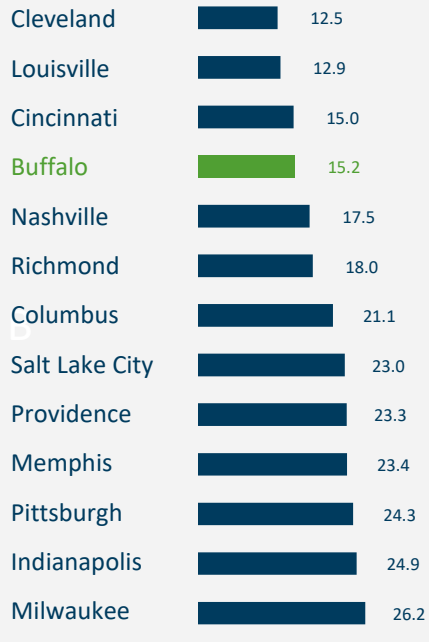
Nameplate Capacity (MW per 1,000 Pop.)



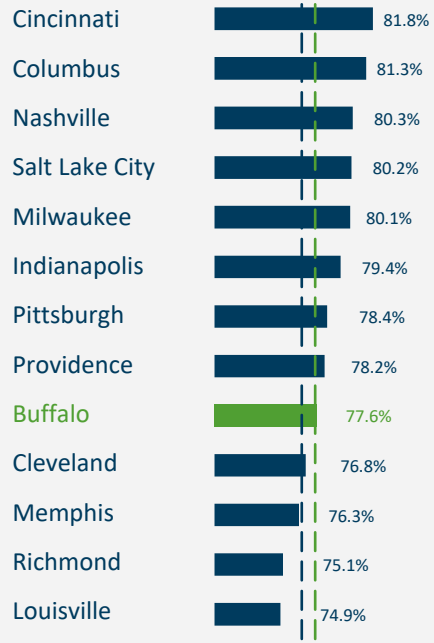
Power Outage Consumer-hours per capita



Pressure on Water Supply Index



Share of Households with Fixed Broadband



NY - - - US - - -

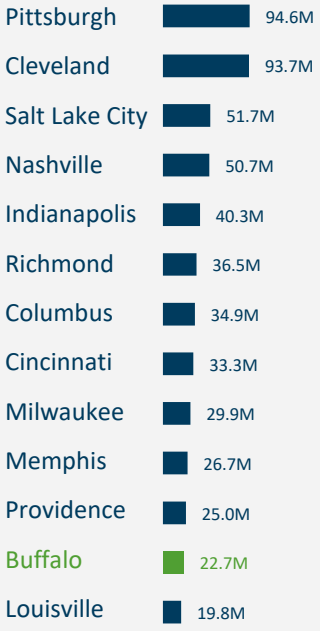
Source: Environmental Protection Agency, 2023; US Department of Energy, 2023; CountyScore data downloaded Sep 2026 (scores for counties with available data weighted by population); Census Bureau, 2023 Population Estimates and 2024 American Community Survey.

COMMERCIAL REAL ESTATE AND SITES

Buffalo Niagara ranks 10th of 13 in available office inventory (4.8M sf) and 11th in available industrial inventory (8.2M sf), well behind leaders Pittsburgh (16.4M sf) and Indianapolis (21.4M sf). The region has limited speculative office or industrial construction activity. Buffalo Niagara's parking score of 64 is the second-highest of its peers, signaling land that could be redeveloped for productive use.

Buffalo Niagara has lower levels of available inventory, even when factoring in market size

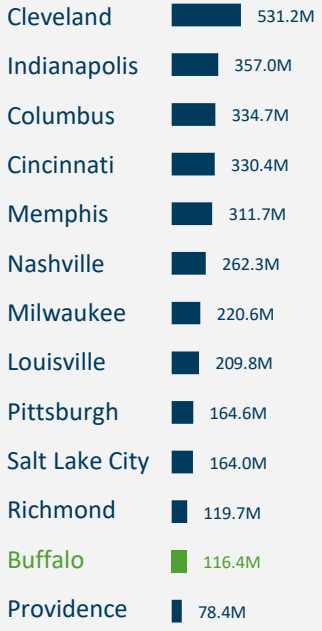
Office Total Inventory (sf)



Office Available Inventory (sf)



Industrial Total Inventory (sf)

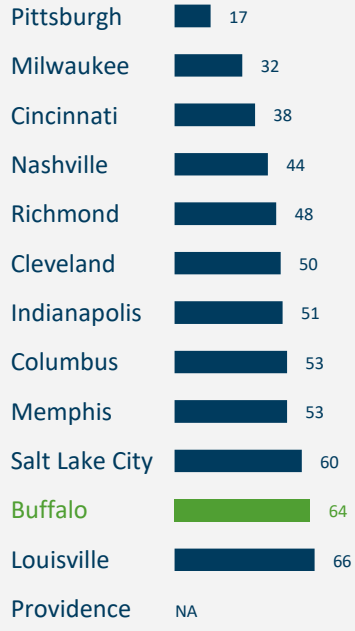


Industrial Available Inventory (sf)



Redevelopment opportunities

Parking Score
(index score based on amount of land in city's urbanized area dedicated to off-street parking)



Source: Cushman & Wakefield, Q2 2026; Parking Reform Network, data gathered Sep 2026

INVESTMENT AND OPPORTUNITY

Economic success is ultimately measured not only by growth, but by whether it expands opportunity for residents and communities throughout the region. The strength of a regional economy is reflected not only in its growth, but in the extent to which opportunity is accessible across communities. Buffalo Niagara demonstrates strengths in several areas, including relatively strong earnings outcomes and poverty rates that compare favorably with some peer regions. However, the ability to increase income has decreased over time; poverty remains highly concentrated in certain neighborhoods; and minority business ownership trails many benchmark metros. Local government revenues have also declined significantly in recent years, limiting the resources available to support future investment.

These dynamics suggest that expanding opportunity will require a sustained focus on both people and place. Growing entrepreneurship, broadening pathways to business ownership, and increasing the capacity for public and private investment can help ensure that more residents and neighborhoods participate in the region's economic progress.

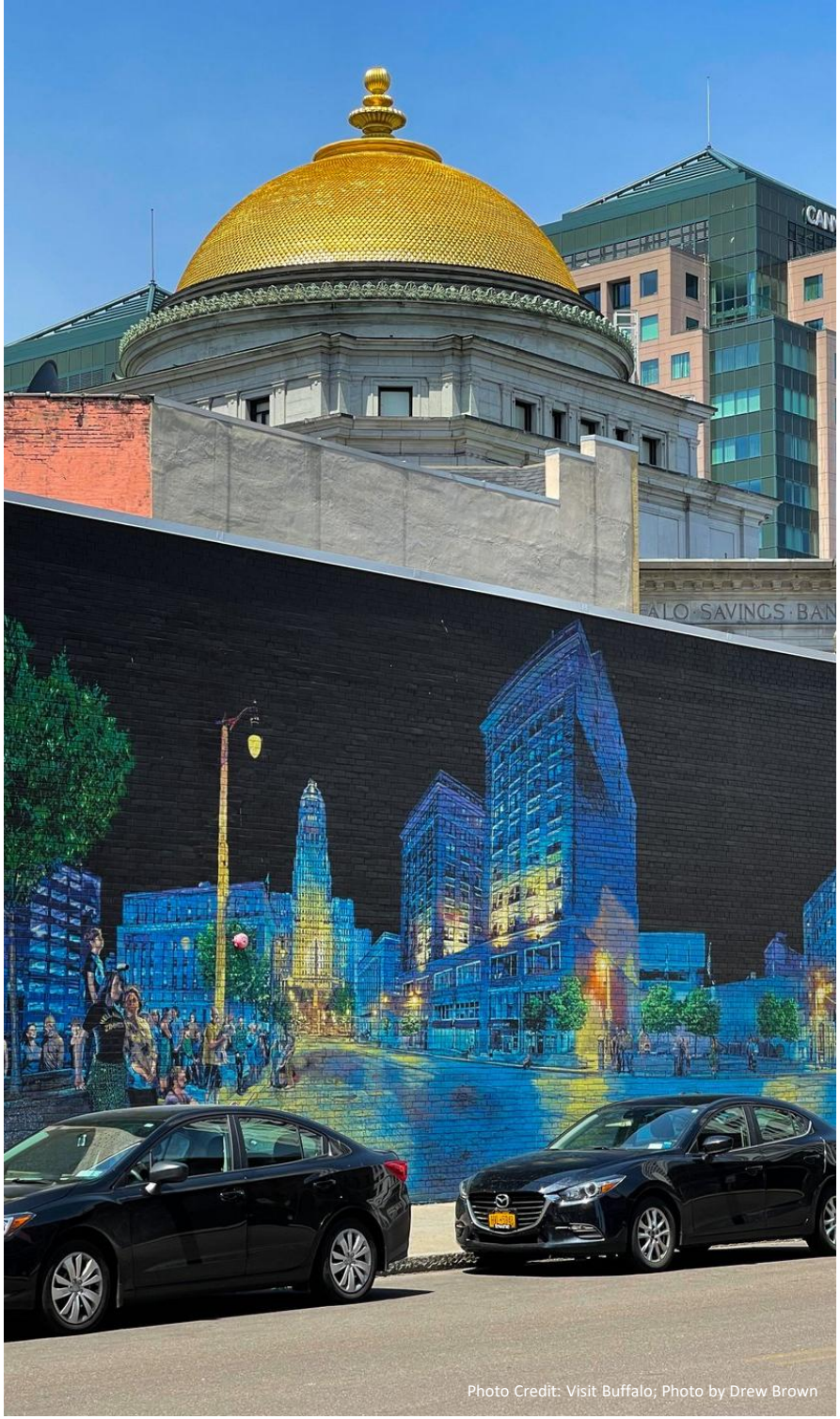
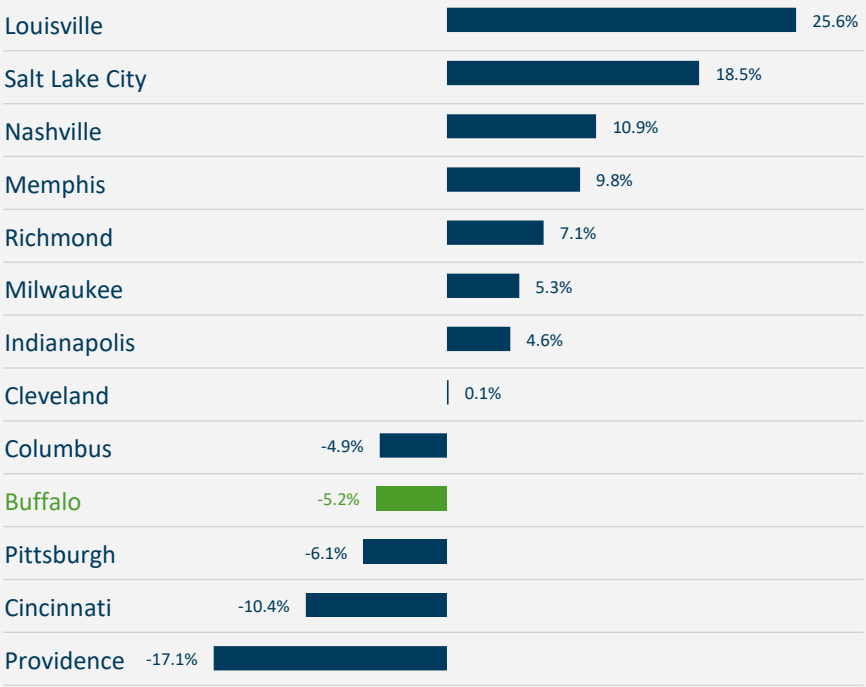


Photo Credit: Visit Buffalo; Photo by Drew Brown

REVENUE GENERATION FOR PUBLIC INVESTMENT

Revenue from local taxes and fees in Buffalo Niagara's core city fell 5.2% from 2018 to 2023, ranking it 10th among its 12 peer metros, while Louisville (+25.6%), Salt Lake City (+18.5%), and Nashville (+10.9%) expanded theirs. **A shrinking local revenue base limits the city's capacity to fund infrastructure, services, and other public investments that support growth.**

Change in Core City* Revenue from Local Taxes and Fees, 2018-2023



Source: Lincoln Institute of Land Policy. *Note: Fiscally Standardized Cities defined by source (excludes transfers from federal or state).

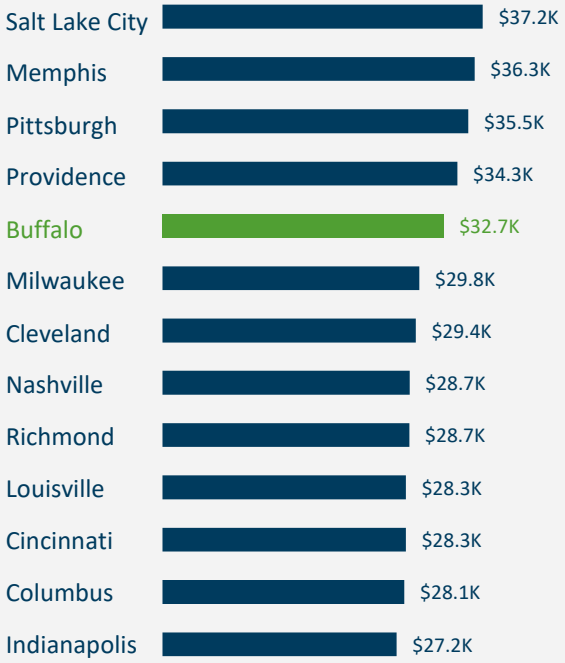


Photo Credit: Visit Buffalo; Photo by Terry Cervi

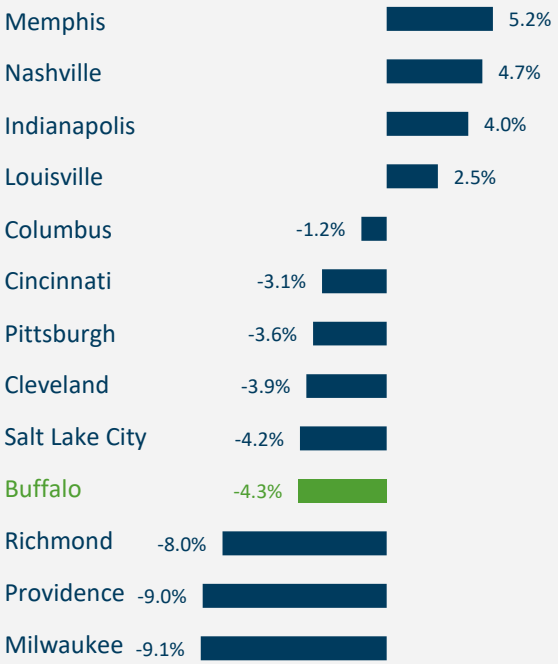
OPPORTUNITY ACROSS TIME AND LOCATION

Those from low-income families in Buffalo Niagara earn $32,666 by age 27, fifth among its 12 peer metros. But mobility is slipping: that income fell 4.3% between the 1978 and 1992 birth cohorts, ranking 10th. Poverty is also concentrated, with 7.0% of residents in poverty living in high-poverty tracts, third-highest among peers and above the US (5.6%).

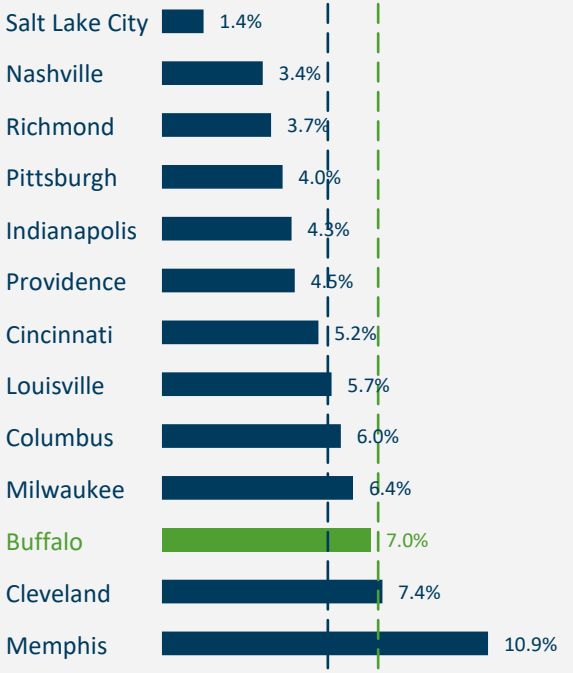
Income at Age 27 for People Born in 1992 from Low-Income Households



Change in Income at Age 27 between 1978 Birth Year and 1992 Birth Year



% of Residents in Poverty Living in Census Tracts with Poverty Rate >20%

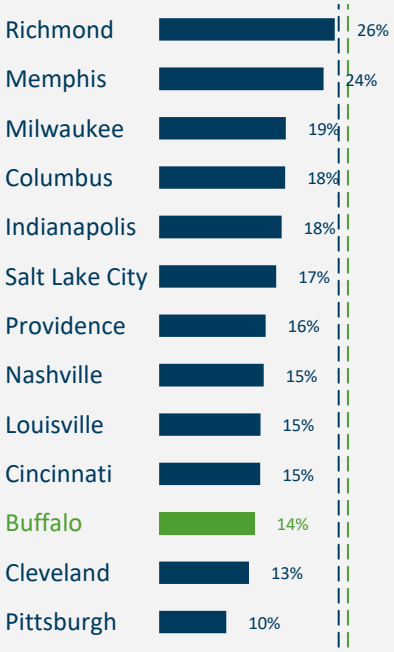


Source: Opportunity Insights; Census Bureau, 2024 American Community Survey

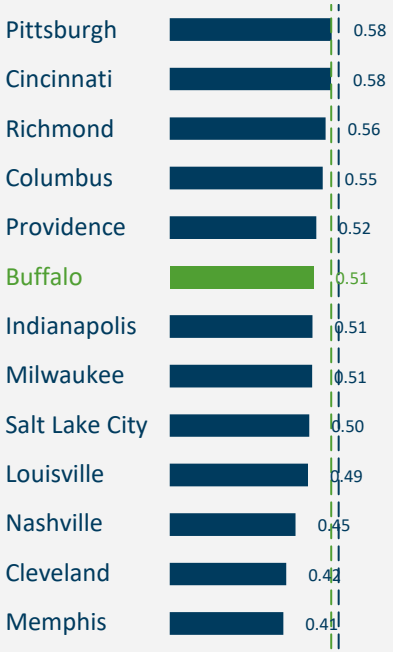
MINORITY-OWNED BUSINESS

Minority-owned businesses build wealth, create jobs, and broaden economic opportunity in communities of color. In Buffalo Niagara, 14% of classifiable employer businesses are majority minority-owned, ranking it 11th among its 12 peers, though ownership relative to the minority population sits closer to the middle. **Strengthening regional efforts to advance small business, including those owned by people of color, can be a vital step towards increasing the number of viable minority enterprises.**

Share of classifiable employer businesses that are 50%+ minority-owned



Ratio of share of classifiable employer businesses that are 50%+ minority-owned to minority share of population



Source: Census Bureau, Annual Business Survey and Population Estimates, 2023



Buffalo Niagara ranks 11th of 13 in minority-owned business share (14%) but sixth in ratio to population (0.51); ownership still trails representation, signaling room to grow minority entrepreneurship.

Photo Credit: Visit Buffalo;

INDUSTRY

Buffalo Niagara's key sectors and industries pair established strengths with emerging growth. Across 10 sectors benchmarked against 12 peer metros, the region's clearest advantages are in semiconductors, clean energy, and food processing.

Fastest growing: Semiconductors lead all peers in job growth (+141%) and concentration (location quotient (LQ) 2.25). Food and beverage processing (+25.1%, second), clean energy (+73%, third), and advanced manufacturing (+11.9%, third) also outpace most peers.

Most productive: Clean energy ranks first in GRP per job (about $973,000), and both tourism and hospitality and logistics both rank second.

Gaps to close: Information technology ranks 12th on all three measures, while advanced business services (−7.1%) and logistics (−4.8%) rank last in job growth.

Opportunity: Scaling specialized clusters such as semiconductors and clean energy, while lifting productivity in advanced manufacturing, health and life sciences (both below US GRP per job), and advanced business services and logistics (both below US job growth), can elevate economic value and growth.

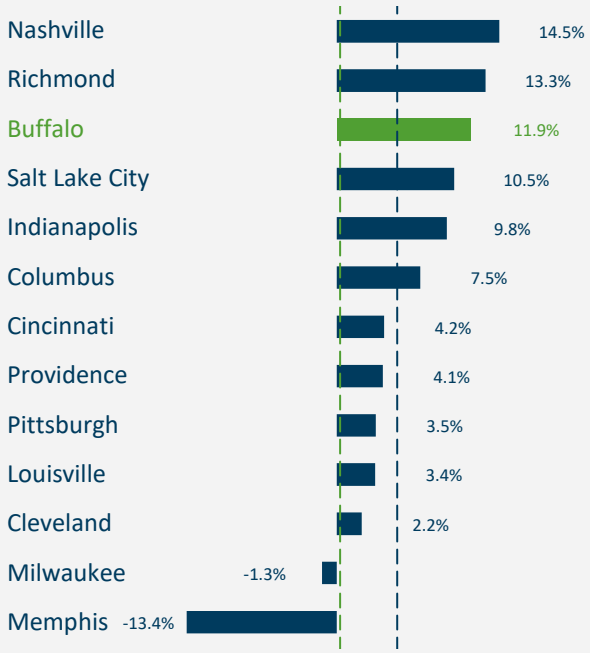


TARGET INDUSTRY ANALYSIS

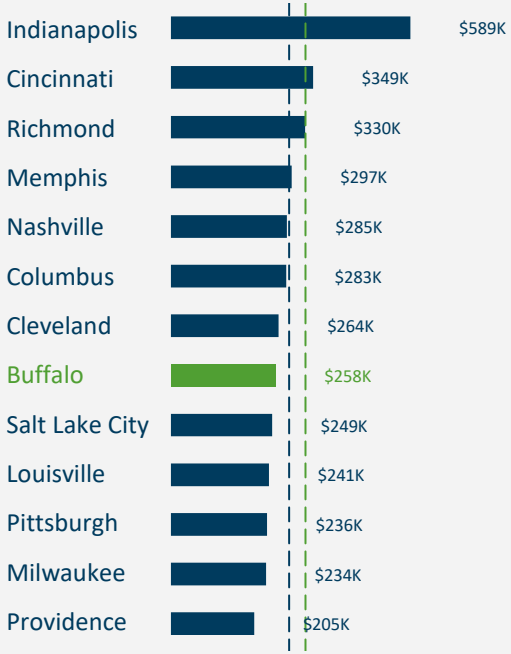
Advanced Manufacturing

Buffalo Niagara ranks third of 13 in advanced manufacturing job growth (11.9%, more than twice the US rate) and fifth in employment concentration (LQ 1.36), but only eighth in GRP per job ($258,000, below the US). The region is adding jobs in a core industry strength; raising productivity is the next priority.

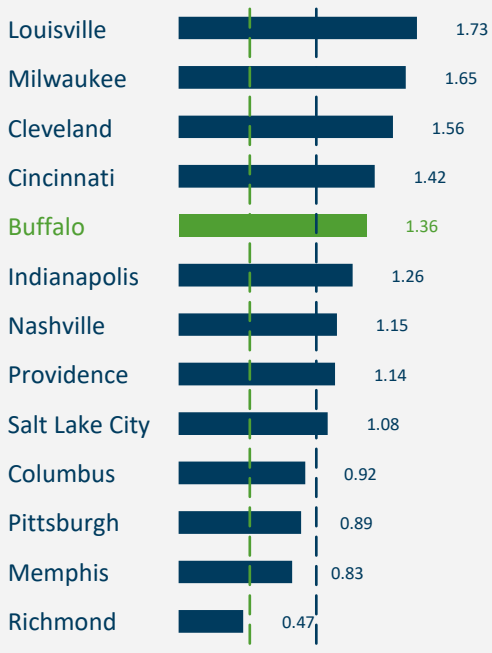
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



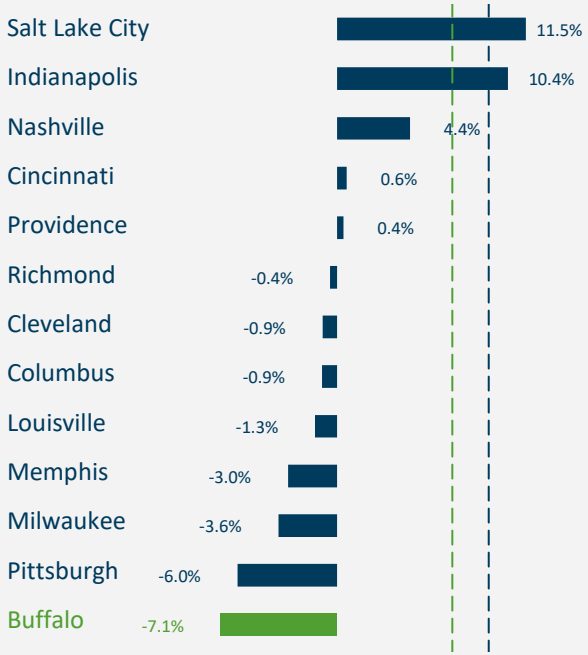
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

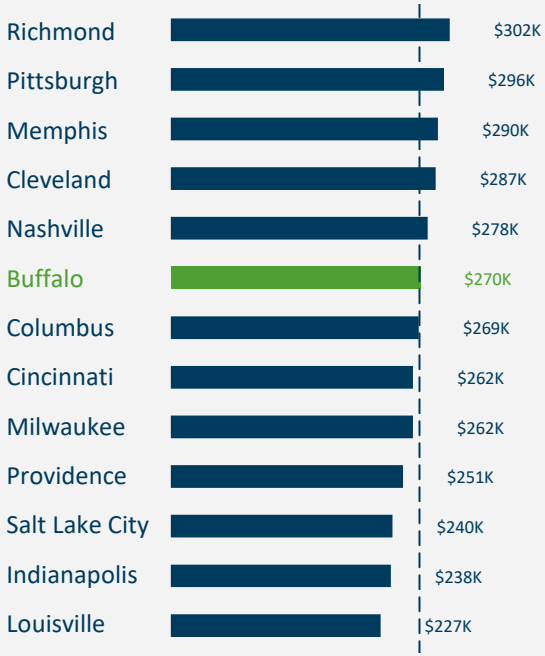
Advanced Business Services

Buffalo Niagara's Advanced Business Services jobs fell 7.1% from 2020 to 2025, last among 13 peers, as NY and the US grew 7.0% and 9.2%. Productivity is competitive at $270,276 GRP per job (6th), on par with the US, but a 0.94 location quotient (10th) signals an under-concentrated, high-value sector with room to grow.

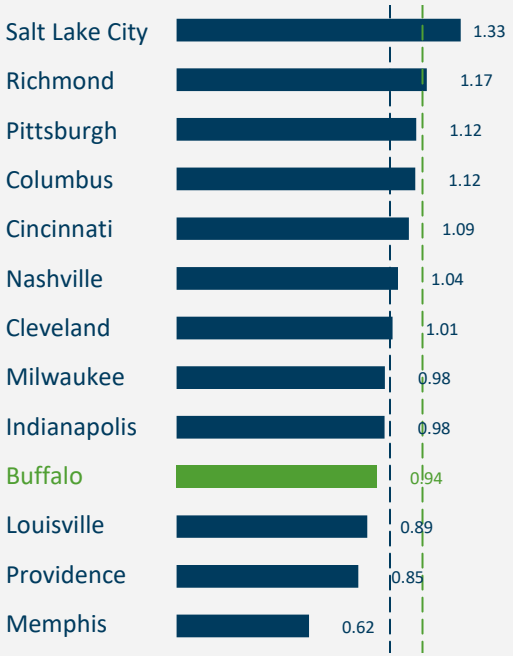
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



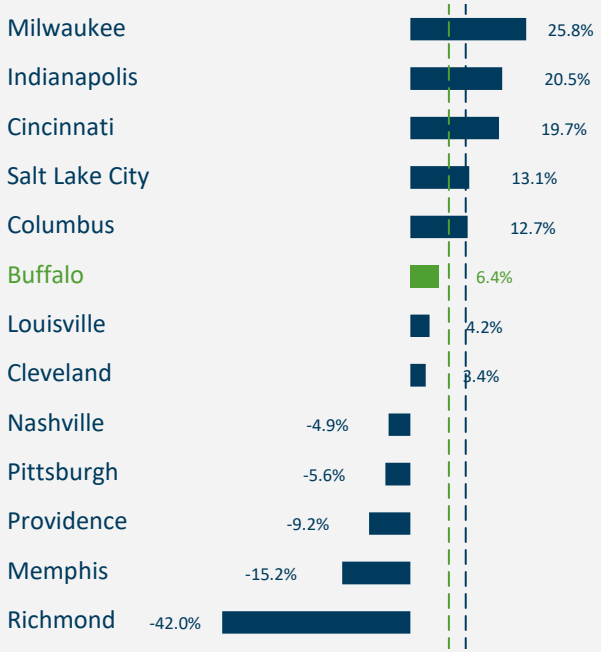
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

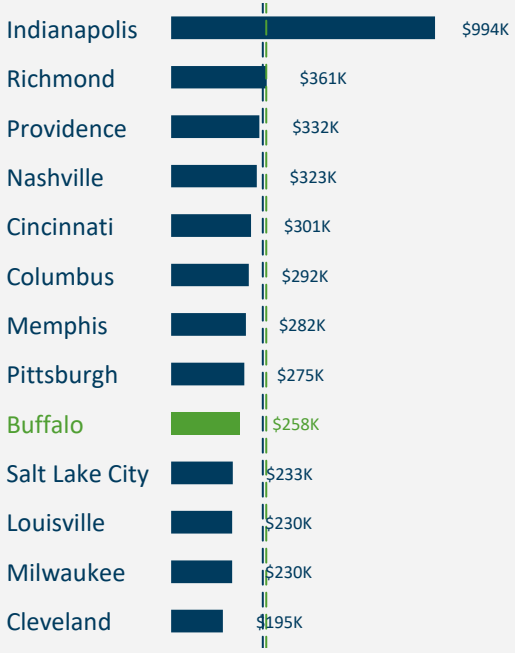
Health and Life Sciences

Health and life sciences is a regional strength: Buffalo Niagara ranks 3rd of 13 in concentration (LQ 1.77) and 6th in job growth (6.4%), though below NY (8.6%) and the US (12.3%). GRP per job ranks 9th at $258K, trailing NY and the US, signaling room to raise productivity in this specialized sector.

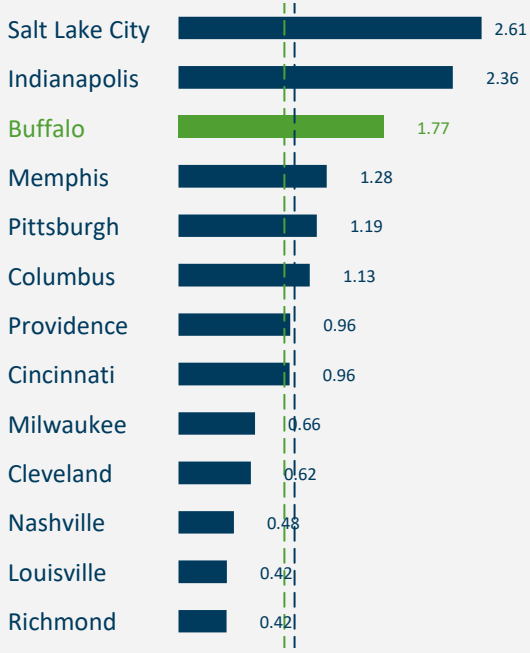
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



Source: Lightcast.

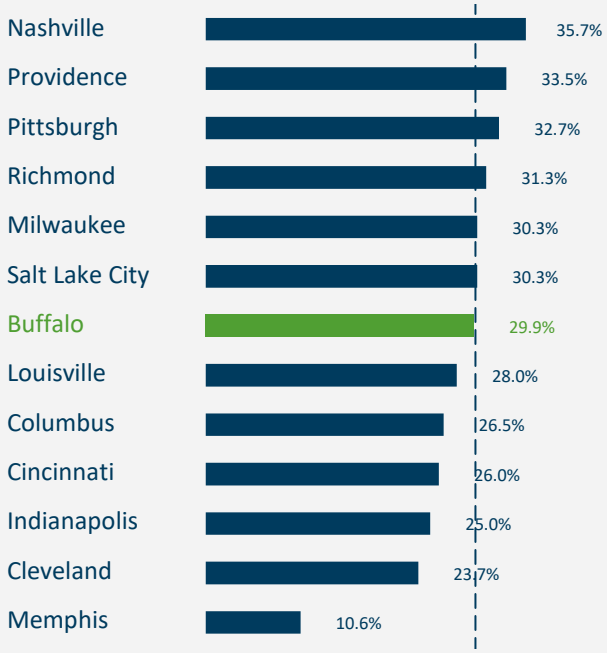
NY - - - US - - -

TARGET INDUSTRY ANALYSIS

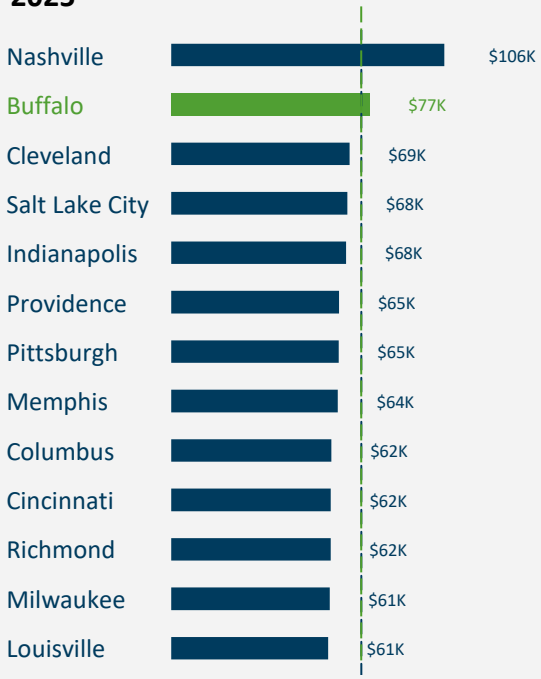
Tourism and Hospitality

Buffalo Niagara ranks 2nd of 13 in tourism and hospitality GRP per job ($76,700), trailing only Nashville. Jobs grew 29.9% from 2020 to 2025 (7th), and employment concentration (LQ 0.99, 5th) is in line with the national average. High productivity gives the region a base to grow visitor-driven employment.

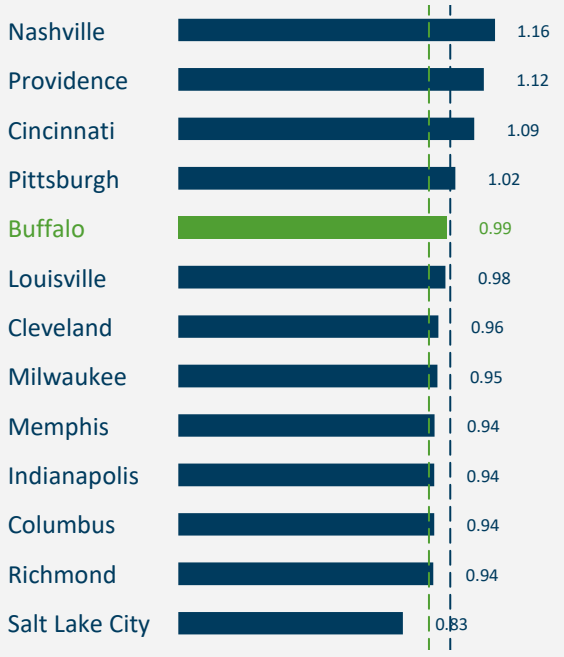
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



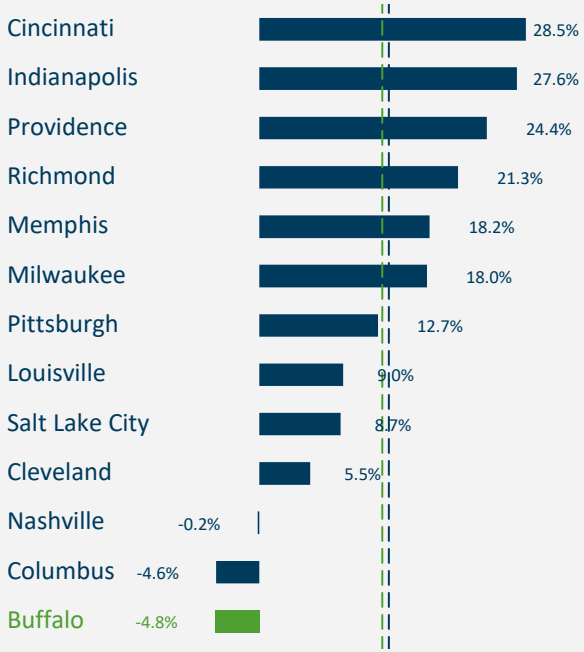
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

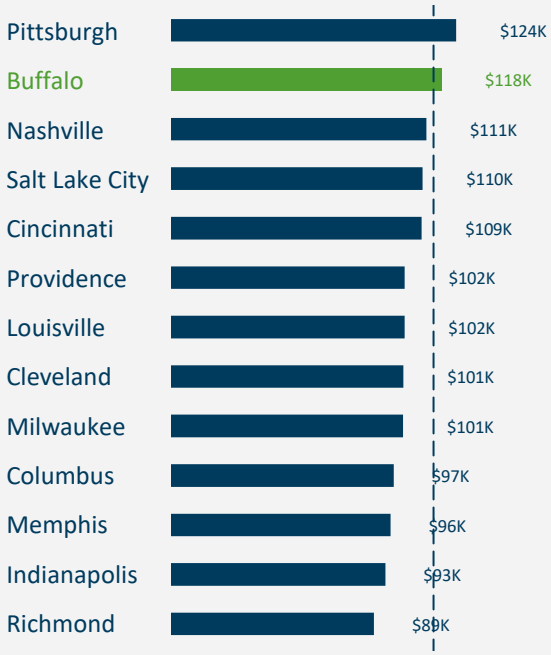
Logistics and Distribution

Buffalo Niagara ranks 2nd of 13 in logistics GRP per job ($118K, above the U.S.), but last in job growth (-4.8% vs. 13.9% nationally) and employment concentration (LQ 0.69). The sector is productive but undersized and shrinking, signaling room to expand regional distribution capacity.

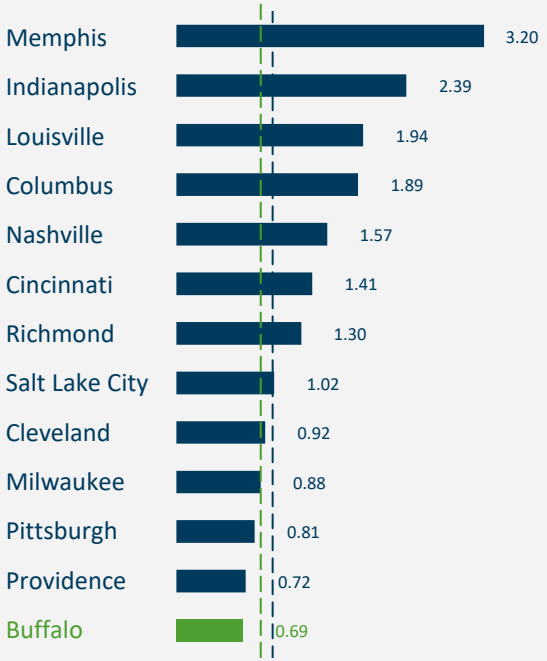
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



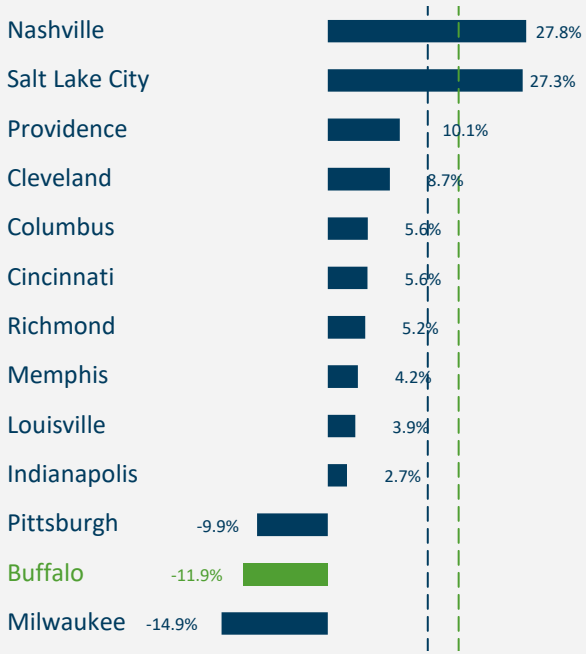
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

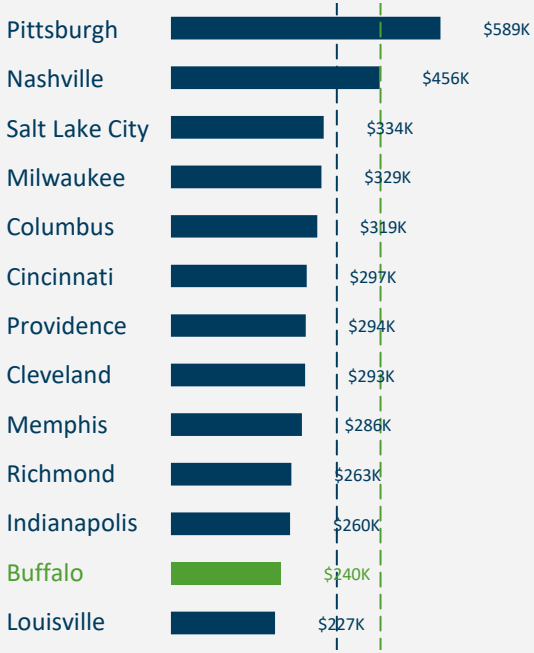
Information Technology

Buffalo Niagara's IT sector ranks 12th of 13 peers on all three measures: GRP per job ($240K), job growth (an 11.9% decline since 2020), and concentration (LQ 0.46). With IT jobs shrinking and at less than half the national share, building the region's tech talent base is a competitiveness priority.

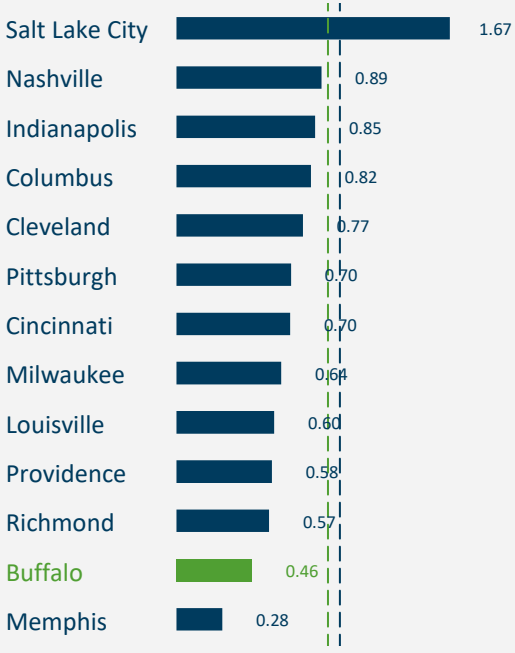
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



Source: Lightcast.

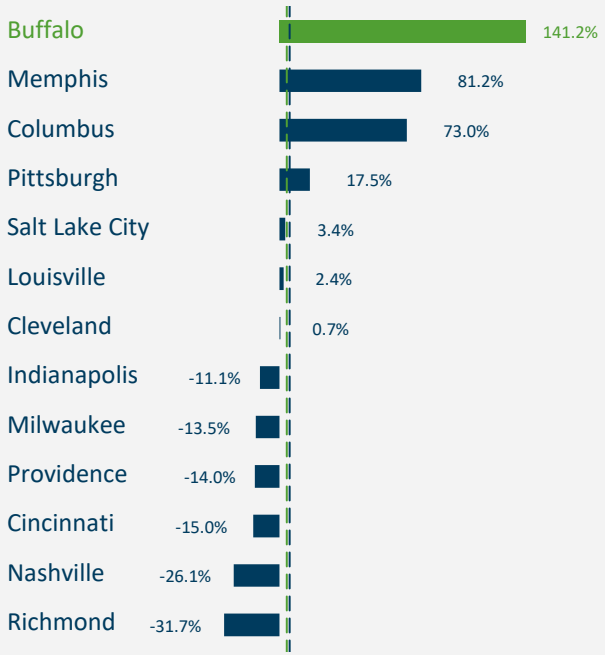
NY - - - US - - -

TARGET INDUSTRY ANALYSIS

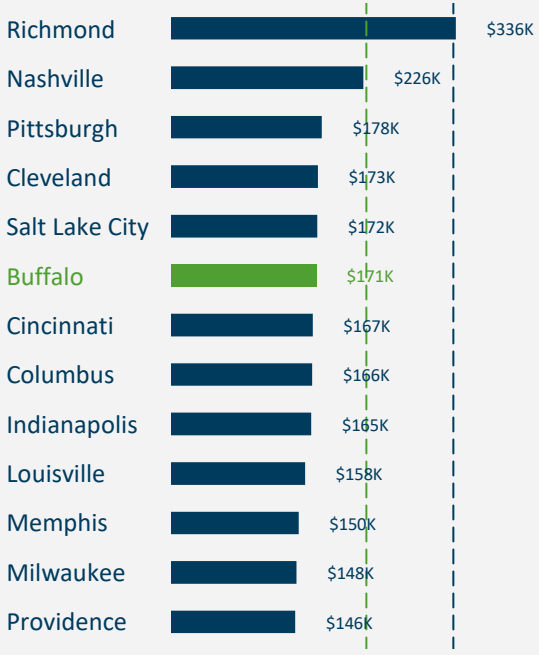
Semiconductors

Semiconductors are a standout regional strength: Buffalo Niagara ranks 1st of 13 peers in both job growth (+141%, 2020-2025) and employment concentration (LQ 2.25). GRP per job ranks 6th at about $171,000, well below the U.S. ($332,000), signaling room to move into higher-value production as the cluster scales.

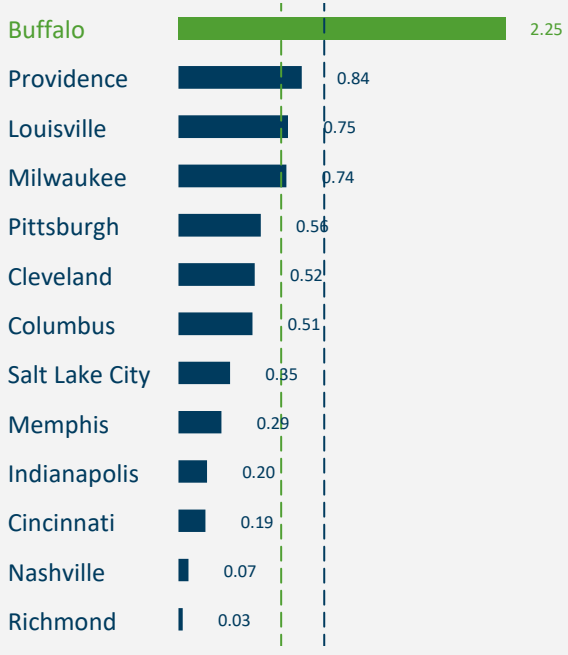
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



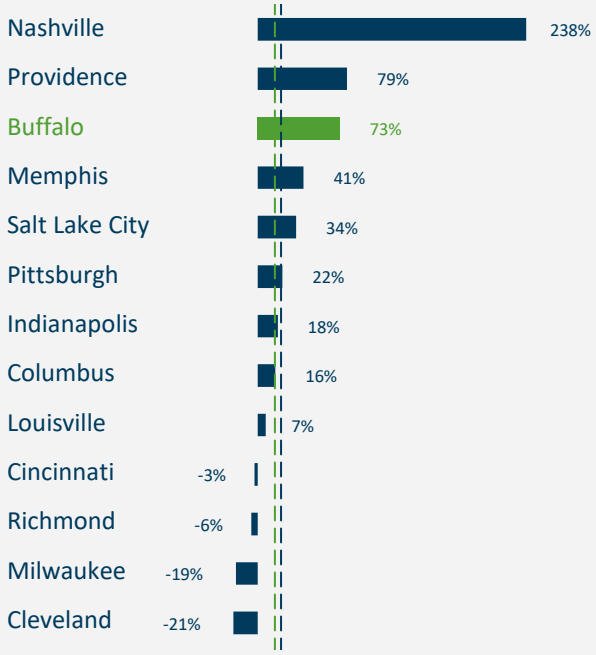
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

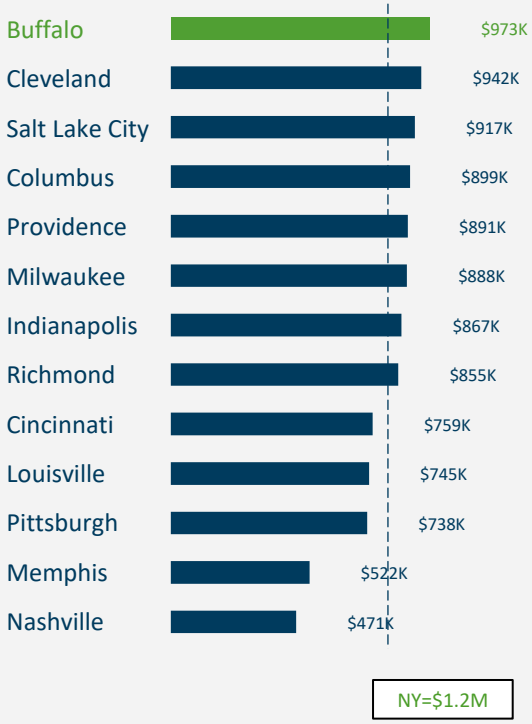
Clean Energy

Buffalo Niagara ranks 3rd of 13 peers in clean energy job growth (+73%, 2020–2025) and 1st in GRP per job (about $973,000), the most productive clean energy workforce in the group. Concentration remains below the national average (LQ 0.82, 5th), signaling room to scale a high-value, fast-growing sector.

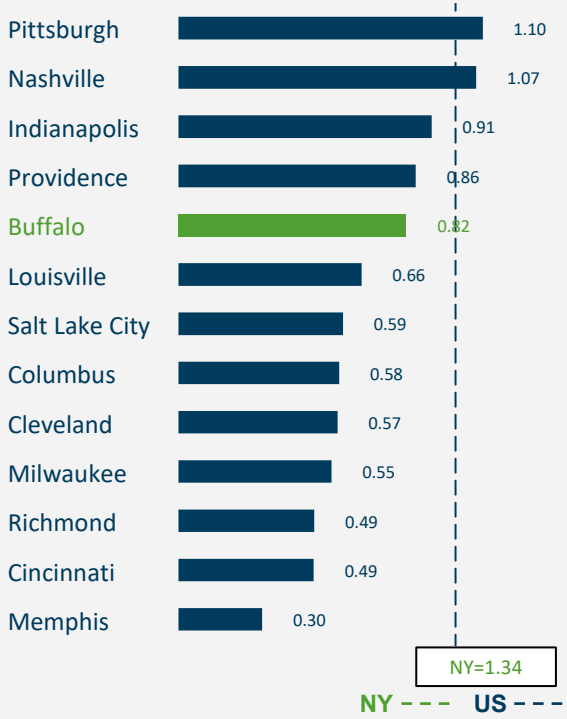
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



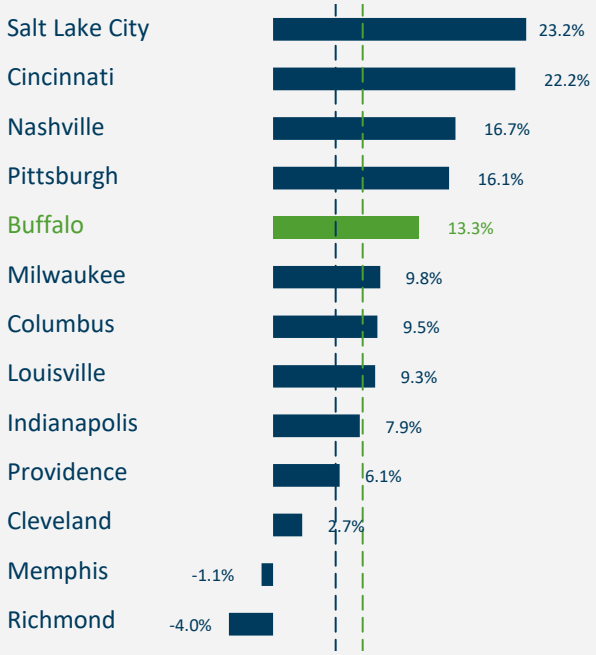
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

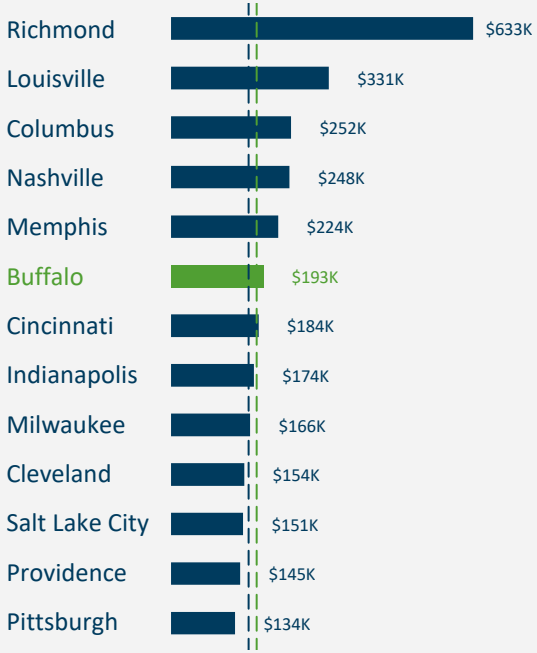
Agribusiness

Buffalo Niagara's agribusiness jobs grew 13.3% from 2020 to 2025, 5th of 13 peers and well above NY (8.2%) and the US (5.7%). GRP per job of $193,185 ranks 6th, above state and national levels. Concentration (LQ 0.72, 5th) remains below the US average, signaling room to scale a productive, growing sector.

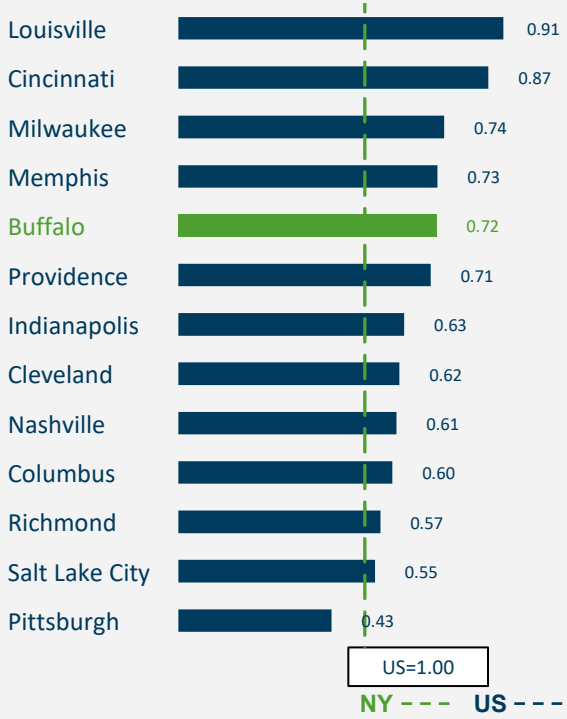
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



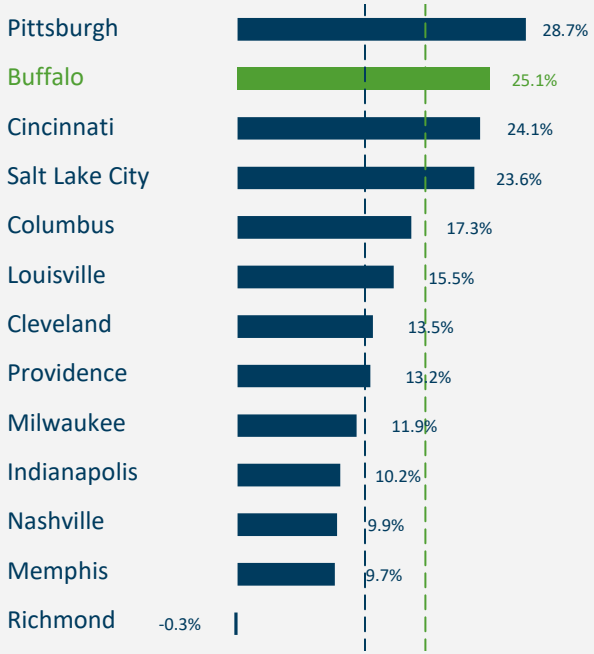
Source: Lightcast.

TARGET INDUSTRY ANALYSIS

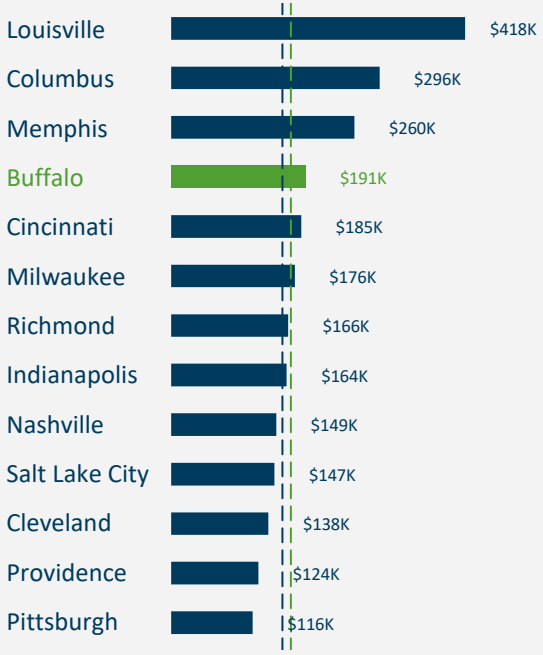
Food and Beverage Processing

Buffalo Niagara's food and beverage processing jobs grew 25.1% from 2020 to 2025, 2nd of 13 peers and well above NY (18.7%) and US (12.7%). GRP per job ($190,600) and concentration (LQ 1.09) both rank 4th, making this a productive, growing base for expansion.

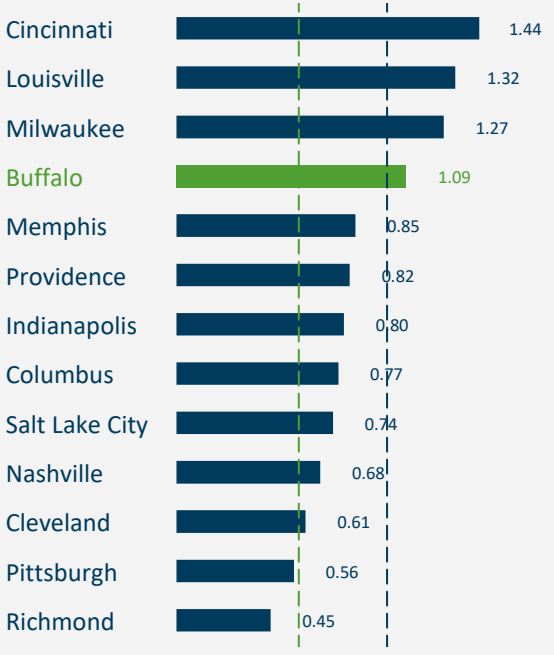
Job Growth, 2020-2025



GRP Per Job, 2025



Employment Concentration, 2025



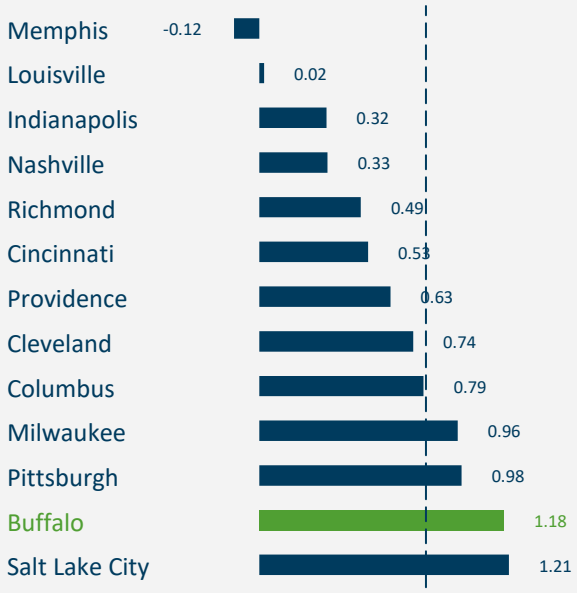
Source: Lightcast.

NY - - - US - - -

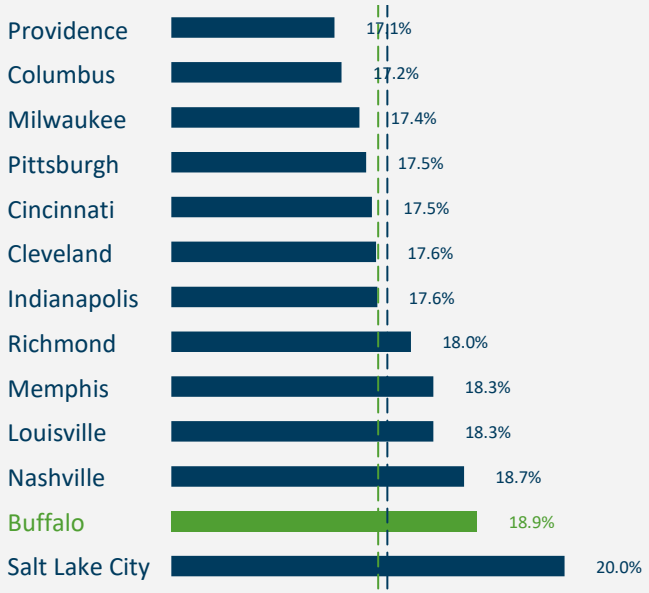
AI AND JOB RISK

Research by Felten, Raj, and Seamans dating back to 2021 continues to be commonly cited due to its uniqueness in providing comprehensive indices of artificial intelligence (AI) exposure across detailed Standard Occupational Classification (SOC) and O*NET categories as well as across all US states and counties. In occupations that typically require higher education, AI exposure will affect the nature of those jobs' functions and activities. Job risk primarily exists at the intersection of high AI exposure and occupations that do not require higher education (Upjohn Institute, "AI Exposure and the Future of Work", September 2025).

AI Geographic Exposure index



Share of jobs in occupations that do not require higher education and where AI Occupational Exposure is above average



Source: Felten E, Raj M, Seamans R (2021) Occupational, industry, and geographic exposure to artificial intelligence: A novel dataset and its potential uses. Strategic Management Journal 42(12):2195–2217; Census Bureau (population-weighted MSA average of county AIGE scores). Note: US AIGE is an unweighted average of state and DC index scores.

NY - - - US - - -

While effect of AI on jobs in upcoming years cannot be predicted with certainty, Buffalo Niagara's relative high exposure to AI risk based this particular study is worthy of discussion and considerations around target industry and job growth, as well as education and training priorities.

BUFFALO NIAGARA PERFORMANCE SUMMARY

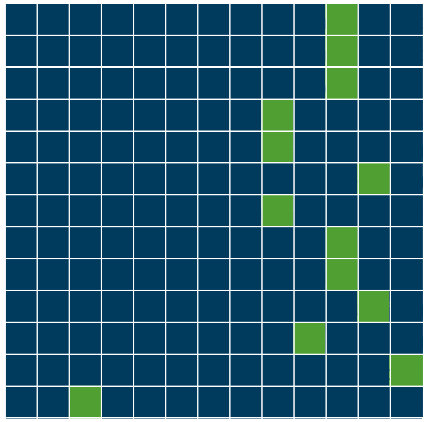
This section provides a graphical snapshot of Buffalo Niagara's competitive performance based on the findings of the Buffalo Niagara Prosperity Report. The rankings from 1 to 13 (1 being best performing and 13 being lowest) capture the regional benchmarking of the region's performance alongside twelve peer and aspirational metropolitan statistical areas (MSAs) across a broad range of indicators. The performance of ten of Buffalo Niagara's key industries are also ranked.

BENCHMARK METROS

- Cincinnati, OH
- Cleveland, OH
- Columbus, OH
- Indianapolis, IN
- Louisville, KY
- Memphis, TN
- Milwaukee, WI
- Nashville, TN
- Pittsburgh, PA
- Providence, RI
- Richmond, VA
- Salt Like City, UT

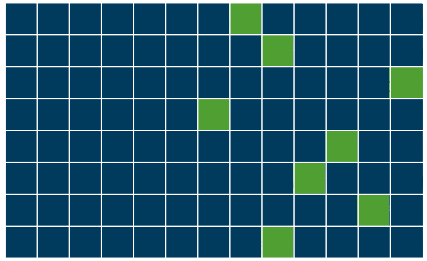
Population

Rank 1 13



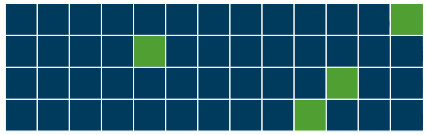
- Population growth, 2020-2025
- Working age population (16-64) growth, 2020-2025
- Share of population, 2025: Age 16-64
- Share of population, 2024: Foreign-born
- Projected population growth, 2025-2035
- Median household income, 2024
- Median household income, 2024: Black as % of White
- Median household income, 2024: Hispanic as % of White
- Median household income growth, 2019-2024
- Poverty rate, 2024
- Median earnings, 2024
- Median earnings, 2024: Black as % of White
- Median earnings, 2024: Hispanic as % of White

Economy



- Job growth, 2020-2025
- GRP growth, 2020-2025
- Establishments growth, 2025
- GRP per job, 2025
- GRP per job growth, 2020-2025
- Average annual wage, 2025
- Average annual wage growth, 2020-2025
- Value of goods exports per capita, 2024

Innovation and entrepreneurship

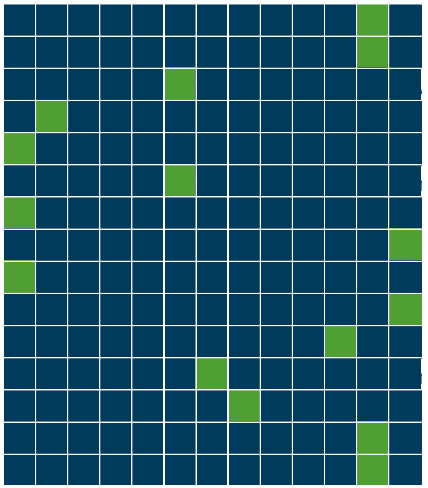


- Business applications per 1,000 pop., 2025
- University R&D per capita, 2024
- Patents assigned per 100,000 pop., 2025
- VC investment per capita, 2023-2025 average

BUFFALO NIAGARA PERFORMANCE SUMMARY

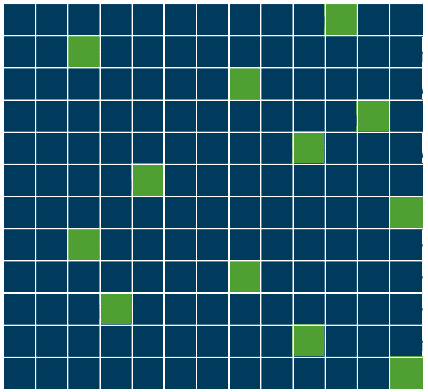
Talent and workforce

	Rank 1	13
Net domestic migration per 1,000 pop. 1 year prior, 2024		
Net domestic migration, bachelor's degree+, 2024		
Gross international migration per 1,000 pop. 1 year prior, 2024		
Gross international migration, bachelor's degree+, 2024		
Educational attainment, pop. age 25-64, 2024: Assoc		
Educational attainment, pop. age 25-64, 2024: Bach+		
On-campus degree completions per 1,000 pop., 2025		
On-campus certificate completions per 1,000 pop., 2025		
On-campus STEM degree completions per 1,000 pop., 2025		
On-campus STEM certificate completions per 1,000 pop., 2025		
Labor force participation rate, age 25-64, 2024		
Median earnings, jobs, 2025		
Median earnings, jobs, growth, 2020-2025		
AI Geographic Exposure index		
Share of jobs in occupations with higher AI risk, 2025		



Housing and community

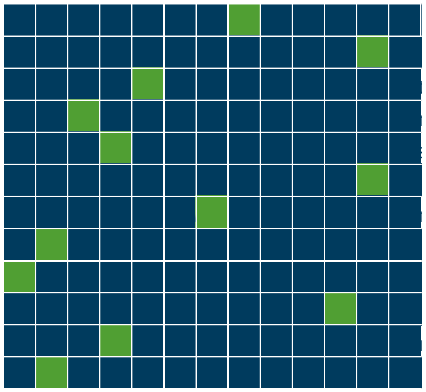
Cost of living index, 2025	
Homeownership rate, 2024	
Gap in homeownership rate, 2024: Black	
Gap in homeownership rate, 2024: Hispanic	
Gap in homeownership rate, 2024: Asian	
Housing value, July 2026	
Housing value growth, July 2021 to July 2026	
Monthly rent, July 2026	
Monthly rent growth, July 2021 to July 2026	
% of households with housing costs 30%+ of income, 2024	
Mortgage delinquency rate (%), Dec 2025	
Housing units permitted per 1,000 existing units, 2025	



BUFFALO NIAGARA PERFORMANCE SUMMARY

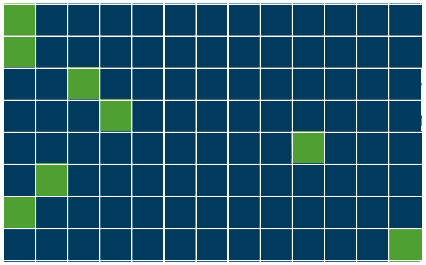
Health and wellbeing

	Rank 1	13
Adults who have had high cholesterol, 2023		
Adults who have had cardiovascular disease, 2023		
Adults who have had depression, 2023		
Adults who have had diabetes, 2023		
Mental health not good 14+ days in past year, 2023		
Physical health not good 14+ days in past year, 2023		
Adults who have difficulty running errands alone, 2023		
Adults who could not see a doctor due to cost, 2023		
Adults who do not have a healthcare provider, 2023		
Adults reporting fair or poor health, 2023		
Adults with BMI 30+, 2023		
% of population that is food insecure, 2024		



Transportation

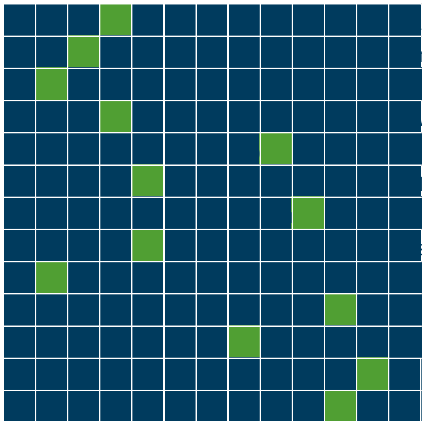
Average travel time to work (minutes), 2024
% commuting 45+ minutes, 2024: Car
% commuting 45+ minutes, 2024: Public transportation
Public transportation ridership per capita, 2025
Public transportation ridership in 2025 relative to 2019
Annual hours congestion delay per auto commuter, 2024
Change in annual hours of delay, 2019-2024
% of households with at least one vehicle, 2024



BUFFALO NIAGARA PERFORMANCE SUMMARY

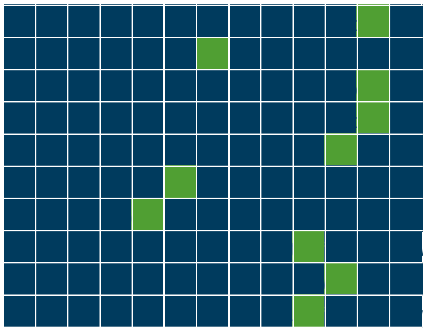
Infrastructure and site readiness

	Rank 1	13
Nameplate capacity, MW per 1,000 pop., 2023		
Power outage events per million pop., 2023		
Power outage consumer-hours per capita, 2023		
Pressure on water supply index		
Share of households with fixed broadband , 2024		
Office vacancy rate, Q2 2026		
Office available inventory, Q2 2026		
Office asking rent per sf, Q2 2026		
Industrial vacancy rate, Q2 2026		
Industrial available inventory, Q2 2026		
Industrial asking rent per sf, Q2 2026		
% of central city land dedicated to off-street parking		
Parking Score (based on land dedicated to off-street parking)		



Investment and opportunity

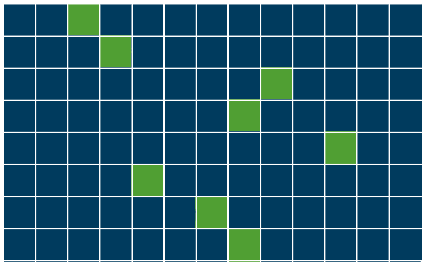
Job creation/ destruction ratio, 2019-2023 annual average
Job creation/ destruction ratio: Establishment births/deaths
Job creation/ destruction ratio: Continuing establishments
Establishment entry/exit ratio, 2019-2023 annual average
Share of businesses that are 50%+ minority-owned, 2023
Ratio of minority business ownership to share of pop., 2023
Income at age 27 for people born in 1992 from low-income
Change in age 27 income: 1978 birth year and 1992 birth year
% of residents in poverty high poverty census tracts, 2024
Change in core city revenue from local taxes and fees, 2018-2023



BUFFALO NIAGARA PERFORMANCE SUMMARY

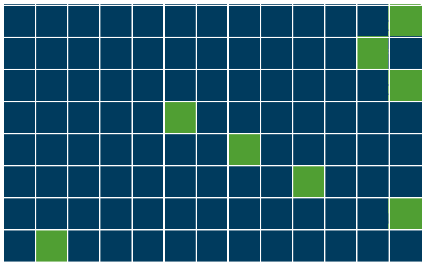
Advanced manufacturing

	Rank 1	13
Job growth, 2020-2025		
GRP growth, 2020-2025		
Establishments growth, 2025		
GRP per job, 2025		
GRP per job growth, 2020-2025		
Employment concentration, 2025		
Average annual wage, 2025		
Average annual wage growth, 2020-2025		



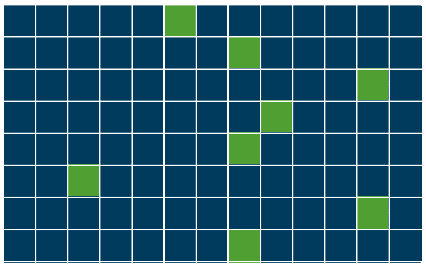
Advanced business services

Job growth, 2020-2025
GRP growth, 2020-2025
Establishments growth, 2025
GRP per job, 2025
GRP per job growth, 2020-2025
Employment concentration, 2025
Average annual wage, 2025
Average annual wage growth, 2020-2025



Health and life sciences

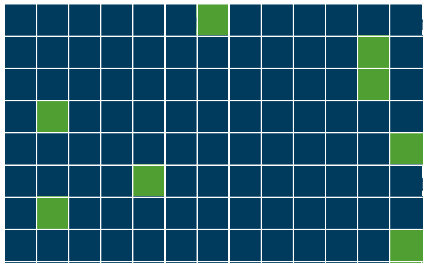
Job growth, 2020-2025
GRP growth, 2020-2025
Establishments growth, 2025
GRP per job, 2025
GRP per job growth, 2020-2025
Employment concentration, 2025
Average annual wage, 2025
Average annual wage growth, 2020-2025



BUFFALO NIAGARA PERFORMANCE SUMMARY

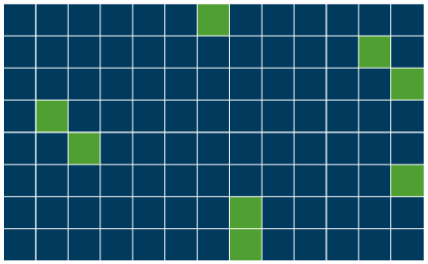
Hospitality and tourism

	Rank 1	13
Job growth, 2020-2025		
GRP growth, 2020-2025		
Establishments growth, 2025		
GRP per job, 2025		
GRP per job growth, 2020-2025		
Employment concentration, 2025		
Average annual wage, 2025		
Average annual wage growth, 2020-2025		



Logistics and distribution

Job growth, 2020-2025
GRP growth, 2020-2025
Establishments growth, 2025
GRP per job, 2025
GRP per job growth, 2020-2025
Employment concentration, 2025
Average annual wage, 2025
Average annual wage growth, 2020-2025



Information technology

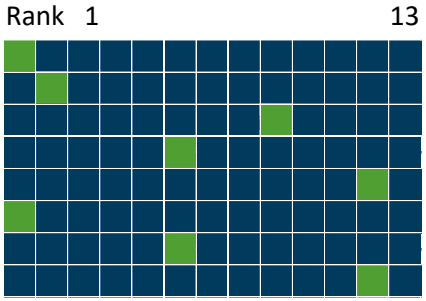
Job growth, 2020-2025
GRP growth, 2020-2025
Establishments growth, 2025
GRP per job, 2025
GRP per job growth, 2020-2025
Employment concentration, 2025
Average annual wage, 2025
Average annual wage growth, 2020-2025



BUFFALO NIAGARA PERFORMANCE SUMMARY

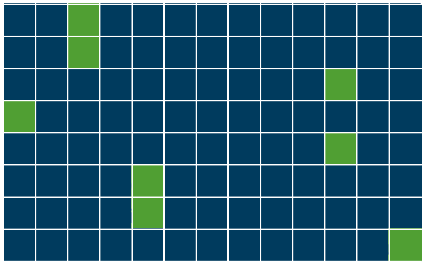
Semiconductors

Job growth, 2020-2025	
GRP growth, 2020-2025	
Establishments growth, 2025	
GRP per job, 2025	
GRP per job growth, 2020-2025	
Employment concentration, 2025	
Average annual wage, 2025	
Average annual wage growth, 2020-2025	



Clean energy

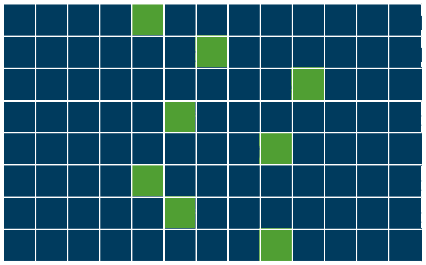
Job growth, 2020-2025	
GRP growth, 2020-2025	
Establishments growth, 2025	
GRP per job, 2025	
GRP per job growth, 2020-2025	
Employment concentration, 2025	
Average annual wage, 2025	
Average annual wage growth, 2020-2025	



BUFFALO NIAGARA PERFORMANCE SUMMARY

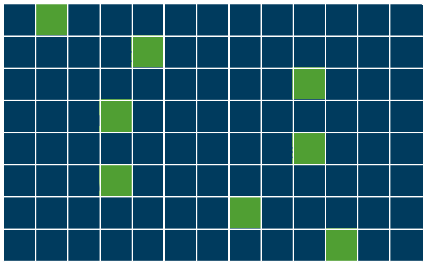
Agribusiness

	Rank 1	13
Job growth, 2020-2025		
GRP growth, 2020-2025		
Establishments growth, 2025		
GRP per job, 2025		
GRP per job growth, 2020-2025		
Employment concentration, 2025		
Average annual wage, 2025		
Average annual wage growth, 2020-2025		



Agribusiness: food and beverage processing

Job growth, 2020-2025
GRP growth, 2020-2025
Establishments growth, 2025
GRP per job, 2025
GRP per job growth, 2020-2025
Employment concentration, 2025
Average annual wage, 2025
Average annual wage growth, 2020-2025



LOOKING TO THE FUTURE

The Buffalo Niagara Prosperity Report provides an objective view of the region's core strengths and assets, gaps and challenges, and sheds light on promising areas of opportunity. The region benefits from an array of established and emerging industry clusters, a robust infrastructure, strong colleges and universities, and a quality of life that compares favorably with many peer regions. Across this analysis, the region consistently demonstrates competitive advantages in talent production, infrastructure reliability, healthcare access, housing stability, and several emerging industries.

Yet the findings also point to a common theme: the region's various assets are not necessarily translating into greater population growth, business formation, wage gains, or broader economic opportunity at the pace seen in leading peer regions or to the extent that residents and community leaders aspire to.

A heightened focus on attracting and retaining talent, supporting entrepreneurship and business expansion, accelerating innovation and commercialization, expanding development-ready sites, and ensuring that more residents can participate in the region's economic progress are among the numerous opportunities that could be expanded upon or explored. Success will depend on sustained collaboration among businesses, economic development organizations, educational institutions, government, and nonprofits around a shared vision for the future.

The region enters the coming decade with momentum and significant advantages that many communities would welcome. By aligning investment, talent, innovation, and community development around common goals, Buffalo Niagara can strengthen its competitiveness, expand opportunity, and build a more prosperous future for the people and businesses throughout the entire region.

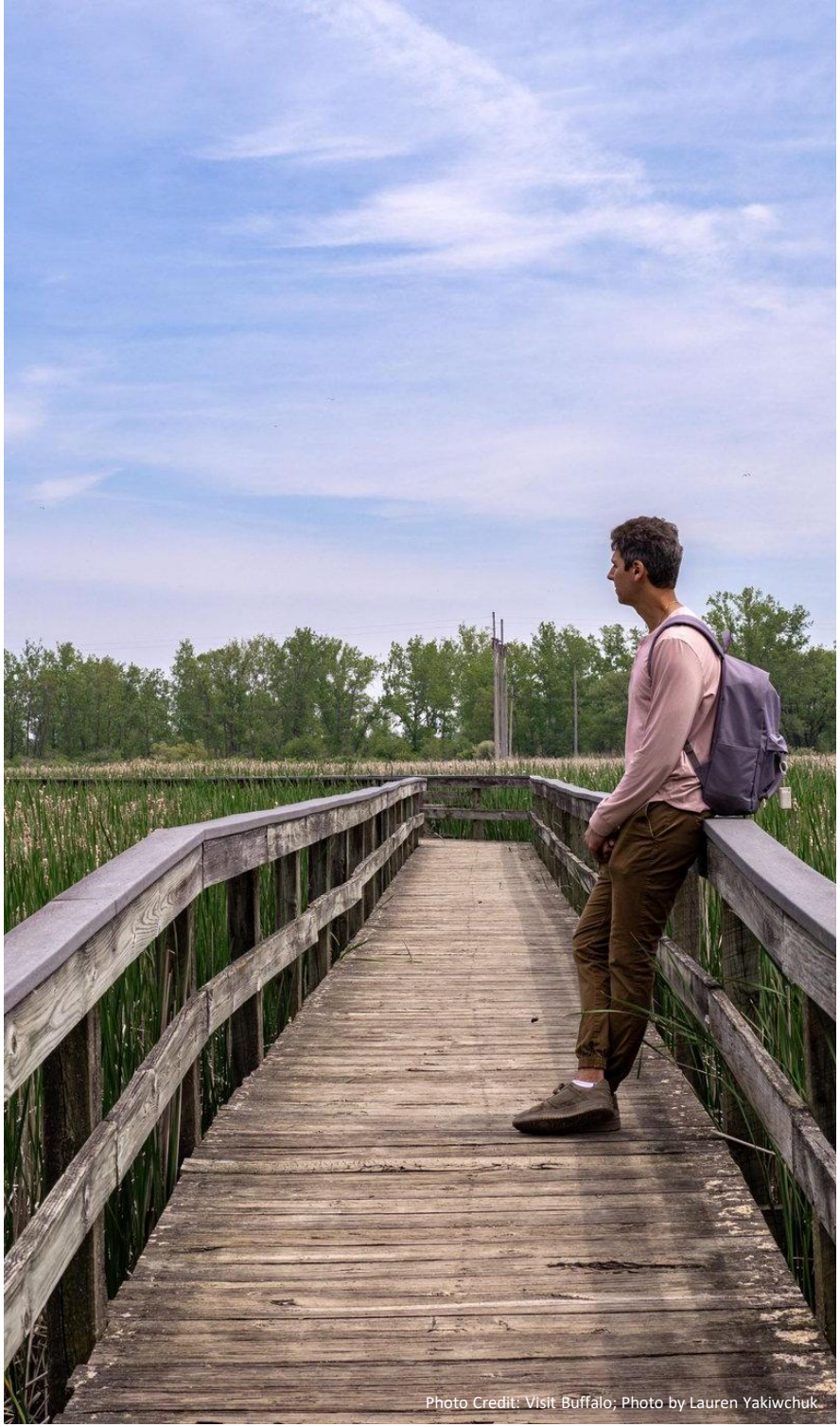


Photo Credit: Visit Buffalo; Photo by Lauren Yakiwchuk.

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BUFFALO NIAGARA PROSPERITY INITIATIVE

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