

A PROFILE OF THE NEW JERSEY MEADOWLANDS REGIONAL ECONOMY AND WORKFORCE

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Prepared for:



The Meadowlands Economic Region

Defining the Meadowlands Region

Following a review of available economic data, the Heldrich Center, in consultation with the Meadowlands Regional Chamber, selected 20 municipalities that share important economic characteristics* and that are contained within or border the wetlands area that traditionally defines the Meadowlands according to the New Jersey Meadowlands Commission (*indicated by the light shading in the map to the right*).

The Meadowlands economic region, as defined in this report, encompasses 15 municipalities in Bergen County and 5 in Hudson County, as follows:

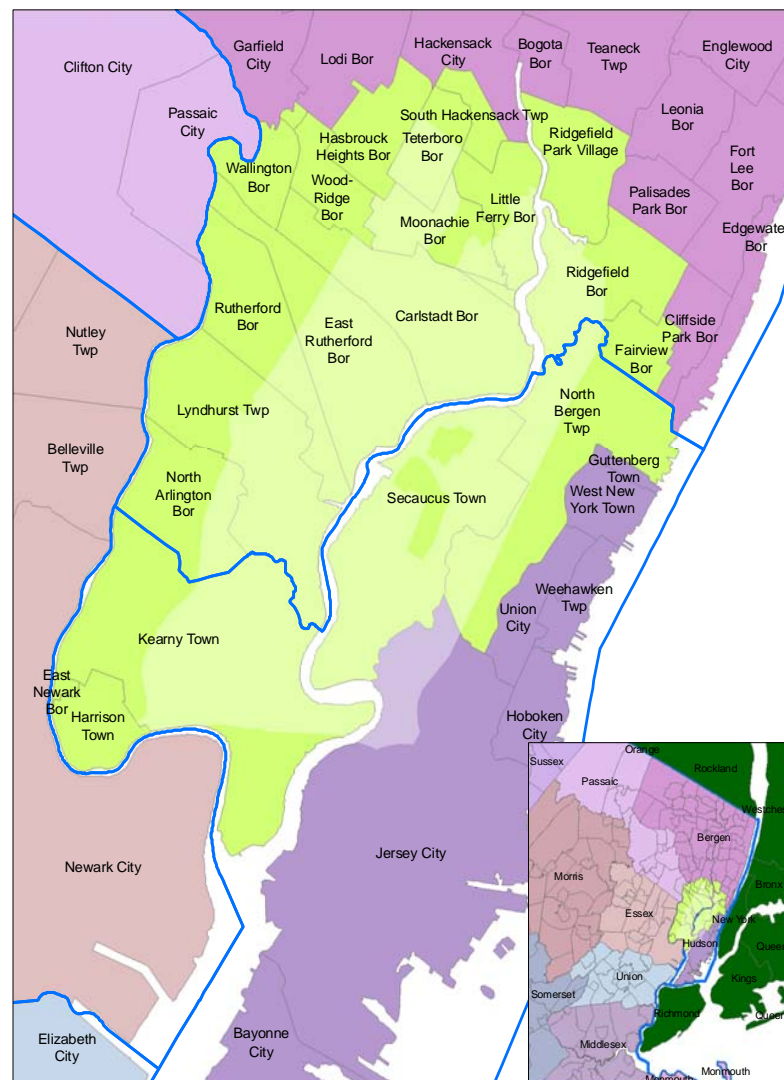
Bergen County

Carlstadt Boro
East Rutherford Boro
Fairview Boro**
Hasbrouck Heights Boro**
Little Ferry Boro
Lyndhurst Twp
Moonachie Boro
North Arlington Boro
Ridgefield Boro
Ridgefield Park Village**
Rutherford Boro
South Hackensack Twp
Teterboro Boro
Wallington Boro**
Woodridge Boro**

Hudson County

East Newark Boro**
Harrison Town**
Kearny Town
North Bergen Twp
Secaucus Town

** Indicates municipalities that are not included in the 14 municipality definition of the region created by the New Jersey Meadowlands Commission.



* Though it is included in the New Jersey Meadowlands Regional Commission's (NJMRC) 14 municipality definition of the region, Jersey City was excluded from the Meadowlands economic region due to the unique economic activities occurring in this city compared to surrounding municipalities. Seven municipalities were added to the economic region in addition to those defined by the NJMRC because they border the Meadowlands environmental region and share a similar industry base.

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A number of other individuals and organizations provided vital contributions to the development of this report. Heldrich Center researchers conducted interviews with the following individuals to obtain important information about future development plans for the Meadowlands region:

Richard Branca, President and Chief Executive Officer, Bergen Engineering Co.

Diana Fainberg, Consultant/Planner, Diana Fainberg and Associates

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Ileana Kafrouni, Director of Land Use Management, New Jersey Meadowlands Commission

Steven Leitner, Vice President, NAI James E. Hanson, Inc.

Richard Roberts, Chief Planner, New Jersey Transit

Sarah Sundell, Assistant Director of Land Use Management, New Jersey Meadowlands Commission

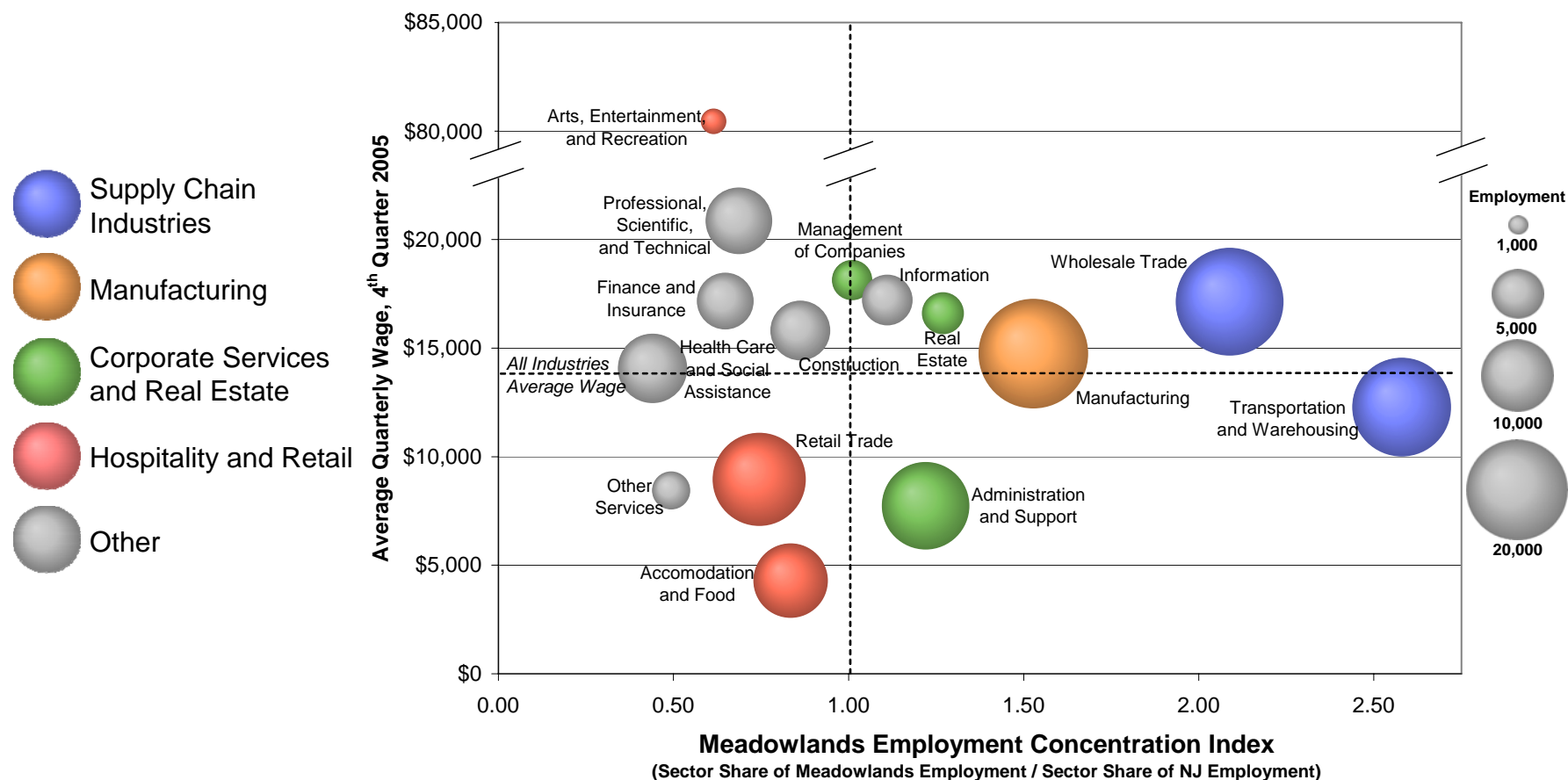
EXECUTIVE SUMMARY

Summary of Findings: The Meadowlands Economy

The following is a summary of key findings and observations derived from the full report regarding the state of the economy in the Meadowlands region:

- The Meadowlands region is a major center of economic activity in New Jersey. It is home to **9,322 business establishments** that employed **over 154,000 workers** in 2005. 93% of these businesses employ fewer than 50 workers, and 56% employ fewer than 5.
- While the overall economy in the Meadowlands shrank slightly (-4%) between 2002 and 2005, projected growth in container shipments to and from Port Newark / Elizabeth, as well as a number of important planned transportation investments and business developments signal the potential for future economic growth in the Meadowlands region.
 - Key developments that have the potential to bring new employers and jobs to the region include plans to expand rail and bus service to and within the region, the Xanadu project, a multi-use retail, entertainment and recreational facility, En-Cap, a large residential, hotel, recreation, and retail development project, the construction of a new stadium at the Meadowlands Sports Complex, and residential and commercial development planned in the Secaucus Junction area.
- Four key industry groups - **Supply Chain Industries, Manufacturing, Corporate Services and Real Estate, and Hospitality and Retail** are either dominant and/or growing in the Meadowlands region. Together, these industry groups account for nearly two-thirds of jobs in the region. *(See the chart on the following page for a description of the size, average wages, and concentration of key industries in the region)*
- These four industry groups, and the sectors within these industries that have experienced recent growth, should be the focus of future economic and workforce development efforts in the region. Industry sectors that grew most between 2002 and 2005 include, Accommodation and Food Services (12%), Real Estate (28%) and Management of Companies (22%).
- The Meadowlands Regional Workforce Development and Sustainability Consortium and its business and government partners should focus new policies and programs on three key priorities: 1) to sustain the viability of current employment in targeted industry groups, 2) to encourage growth of existing business entities, and 3) to support the expansion of new economic opportunities in the region. These efforts should align with the New Jersey Economic Growth Strategy developed by the Governor's Office of Economic Growth, as well as the local economic and workforce strategies and initiatives developed by policymakers in Bergen and Hudson Counties.

Wages and Employment Concentration in the Meadowlands Region, by Industry



Summary of Findings: The Meadowlands Workforce

The following is a summary of key findings and observations derived from the full report regarding the workforce supply for the Meadowlands region, as well as significant educational resources available in the area:

- Employers in the Meadowlands have access to a large supply of workers. In 2000, 64% of all Meadowlands workers lived in **Bergen** and **Hudson** counties (52,333 and 46,350, respectively). The municipalities in and immediately surrounding the Meadowlands region have large portions of their residents working within the region.
- Workers in the primary commutershed area for the Meadowlands may be more reliant on public transportation than workers commuting in from outlying suburban areas, as nearly one-quarter (22% or 197,905) of households in the primary commutershed do not have access to a vehicle.
- Over three-quarters of the residents in this primary commutershed have earned at least a high school diploma or equivalent. Nearly one-third have earned attained an Associates Degree or higher.
- A total of **25 higher education institutions** are located in the Meadowlands and surrounding areas. These institutions and the region's training providers combine to offer more than 600 separate programs to prepare people for jobs in the Meadowlands' four key industry groups. High schools in the region together offer more than 100 career and technical education programs related to these industry groups.
- The Meadowlands Regional Workforce Development and Sustainability Consortium should work closely with the education and training providers in the region, as well as with the region's employers, to develop detailed plans to prepare residents for current and future jobs in the Meadowlands region's key industries. Policymakers should also work closely with area transportation planners to ensure that workers have adequate access to public transportation options.

Key Findings: The Meadowlands Economy

Finding 1: Located close to New York City and major transportation arteries, including Port Newark / Elizabeth, the Meadowlands region is an important center of economic activity in New Jersey. The region hosts 9,322 business establishments that employed over 154,000 workers in 2005. The large majority of business establishments in the Meadowlands region (93%) employ fewer than 50 workers, and 56% employing fewer than 5 workers.

While overall employment declined by a small percentage (-4%) in the Meadowlands between 2002 and 2005, a time when the state's economy grew slightly (2% growth), several key industries and sectors in the region experienced significant growth, including Accommodation and Food Services (12%), Real Estate (28%) and Management of Companies (22%).

A number of key trends, including the expected growth of Port Newark / Elizabeth, several significant transportation investments and a number of proposed business developments, signal the potential for future economic growth in the Meadowlands region. Some of the most significant business developments that have the potential to bring new employers and jobs to the region include the Xanadu project, a multi-use retail, entertainment, and recreational facility to be located near the Meadowlands Sports Complex; En-Cap, a long-term development project involving residential, hotel, recreation, and retail development; the construction of a new stadium at the Meadowlands Sports Complex; and residential and commercial development planned in the Secaucus Junction area.

Key planned transportation developments that may benefit workers and employers include improved access to the Secaucus rail transfer station, including improved bus service in the area, and improvements to Route 3, a major business artery in the region. New Jersey Transit also plans to develop a new rail line into the Meadowlands Sports Complex from Hoboken, which is scheduled to be completed in 2008 along with a connection service to Secaucus rail transfer station. In 2016, New Jersey Transit expects to expand this rail line to New York City. A number of other rail improvements are also scheduled over the next 10 years that will improve access to the Meadowlands from parts of Bergen and Hudson Counties and Rockland County in New York.

Key Findings: The Meadowlands Economy

Finding 2: Four key industry groups, Supply Chain Industries, Manufacturing, Corporate Services and Real Estate, and Hospitality and Retail, dominate the Meadowlands economy, accounting for nearly two-thirds of jobs in the region.

Dominant Industry Groups

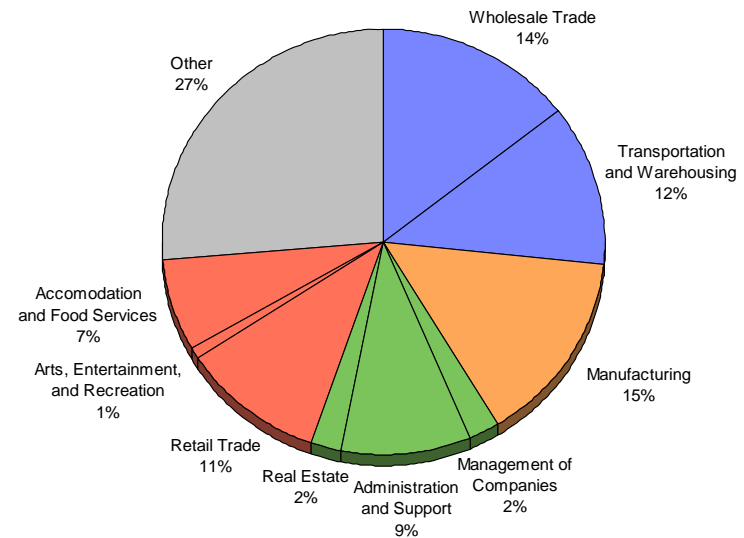
Two of these groups, Supply Chain Industries (including Transportation and Warehousing & Wholesale Trade) and Manufacturing, have long been dominant industries in the region. While employment in these industries declined between 2002 and 2005, these industries account for 40% of all jobs in the region and remain concentrated in the region as -compared to the state as a whole.

Growing Industry Groups

The remaining two industry groups, Corporate Services and Real Estate and Hospitality and Retail, account for nearly one-third of all jobs in the region. Employment in many of these industries grew in the region between 2002 and 2005.

These four industry groups, and the sectors within these industries that have experienced recent growth, should be the focus of future economic development efforts in the region. Strategies should be focused on maintaining employment in dominant industries, supporting growth industry groups, and attracting new employers in key industry groups to the region. All efforts should also be aligned with the efforts of the Governor's Office of Economic Growth and the Workforce and economic development strategies of Bergen and Hudson Counties.

**Employment Distribution by Industry
in the Meadowlands Region,
Fourth Quarter 2005**



Major Other Industries:

Health Care and Social Assistance	6%
Professional, Scientific, and Technical	6%
Construction	4%
Finance and Insurance	4%
Information	3%
Other Services	2%

Source: New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages.

Dominant Industry Groups in the Meadowlands Regional Economy

Key Industry Group #1: Supply Chain Industries

- Transportation and Warehousing
- Wholesale Trade

Total Employment (all industries): 41,042

Total Business Establishments (all industries): 1,834

Key Strengths: High employment, high concentration in Meadowlands

Key Growth Sectors: Wholesale Electronic Markets and Agents and Brokers (3% growth); Support Activities for Transportation (5%)

Key Growth Occupations (Statewide 2004-2014 projected growth):

Jobs requiring less than an Associates degree

- Flight Attendants (26% growth)
- Sales Representatives (19%)
- Packers and Packagers, Hand (19%)

Jobs requiring an Associates degree or higher

- Airline Pilots, Copilots, and Flight Engineers (27%)
- Sales Managers (24%)
- Business Operations Specialists (23%)

Key Industry Group #2: Manufacturing

- Manufacturing

Total Employment: 22,955

Total Business Establishments: 688

Key Strengths: High employment, high concentration in Meadowlands

Key Growth Sectors: Printing and Related Products (4% growth)

Key Growth Occupations (Statewide 2004-2014 projected growth):

Note: While no jobs in Manufacturing are growing statewide, the following are projected to shrink the least:

Jobs requiring less than an Associates degree

- Packers and Packagers (-12% growth)
- Industrial Machinery Mechanics (-13%)

Jobs requiring an Associates degree or higher

- Chemists (-10%)
- Chemical Technicians (-10%)

Growing Industry Groups in the Meadowlands Regional Economy

High Growth Industry Group

Key Industry Group #3: Corporate Services and Real Estate

- Management of Companies and Enterprises
- Administrative Support Services and Waste Management
- Real Estate

Total Employment (all industries): 21,141

Total Business Establishments (all industries): 879

Key Strengths: High growth of some sectors, high concentration in Meadowlands of some sectors, significant employment in some sectors

Key Growth Sectors: Real Estate (22% growth); Management of Companies and Enterprises (22%); Investigation and Security Services (15%)

Key Growth Occupations (Statewide 2004-2014 projected growth):

Jobs requiring less than an Associates degree

- Laborers / Freight and Materials Movers (29% growth)
- Real Estate Sales Representatives (23%)
- Landscaping and Groundskeeping Workers (22%)

Jobs requiring an Associates degree or higher

- Business Operations Specialists (59%)
- Registered Nurses (47%)
- Employment, Recruitment, and Placement Specialists (42%)

Potential Growth Industry Group

Key Industry Group #4: Hospitality and Retail

- Arts, Entertainment, and Recreation
- Accommodation and Food Services
- Retail Trade

Total Employment (all industries): 28,459

Total Business Establishments (all industries): 1,825

Key Strengths: Potential for high growth, growth in some industry sectors, significant employment

Key Growth Sectors: Food and Drinking Places (18% growth); Building Material and Garden Equipment Supplies Dealers (24%); Sporting Goods, Hobby, Book, and Music Stores (14%)

Key Growth Occupations (Statewide 2004-2014 projected growth):

Jobs requiring less than an Associates degree

- Musicians and Singers (40% growth)
- Coaches and Scouts (31%)
- Food Service Managers (21%)

Jobs requiring an Associates degree or higher

- Agents / Managers of Performers, and Athletes (49%)
- Business Operations Specialists (43%)
- Pharmacists (32%)

Key Findings: The Meadowlands Workforce

Finding 3: Employers in the Meadowlands have access to a large supply of workers. More than one million workers live in Bergen and Hudson Counties and the eastern portions of Passaic and Essex Counties, an area that currently provides 72% of all workers in the Meadowlands. Bergen and Hudson Counties alone provide 64% of the workforce.

Over three-quarters of the residents in this primary commuter shed have earned at least a high school diploma or equivalent. Nearly one-third have attained an Associates Degree or higher.

Finding 4: The high schools, colleges, and training providers in the Meadowlands and the surrounding region offer a variety of educational programs to prepare individuals for employment in the four key industry groups in the region.

A total of 25 higher education institutions, including Bergen Community College, Hudson County Community College, Felician College, Rutgers University - Newark, New Jersey Institute of Technology, Stevens Institute of Technology, Ramapo College, and Fairleigh Dickinson University are located in the Meadowlands and its surrounding region.

These institutions and the region's training providers combine to offer more than 600 separate programs to prepare people for jobs in the Meadowlands' four key industry groups. The region's high schools combine to offer more than 100 career and technical education programs to prepare students for jobs in the Meadowlands' four key industry groups.

The Meadowlands Regional Workforce Development and Sustainability Consortium should work closely with these education and training providers and with the region's employers to develop detailed plans to prepare residents for current and future jobs in the Meadowlands region's key industries.

INTRODUCTION

Background and Overview

Why Study the Economic and Workforce Landscape of the Meadowlands Region?

Recognizing that economic and workforce interests cross county boundaries, the New Jersey Meadowlands Commission, the Meadowlands Regional Chamber, the Workforce Investment Boards of Bergen and Hudson Counties, and other stakeholders partnered to create the Meadowlands Regional Workforce Development and Sustainability Consortium. A key mission of the Consortium is to develop a locally produced economic growth and workforce development strategy for the region.

In September 2006, The Meadowlands Regional Chamber contracted with the John J. Heldrich Center for Workforce Development at Rutgers, The State University of New Jersey to develop a detailed profile of the economic landscape of the Meadowlands region.

The purpose of this profile is to ensure that the economic and workforce strategy developed by the Meadowlands Regional Workforce Development and Sustainability Consortium is informed by an analysis of available labor market information, input from various experts in the region's economy and future development plans, and other relevant data.

The report identifies and describes areas of economic strength and opportunity in the Meadowlands region that may be suitable targets for economic and/or workforce development efforts. It also provides key descriptive information about the region's workers, potential workforce supply, and educational and transportation resources.

While it is beyond the scope of this report to assess the adequacy of the transportation and education resources and the workforce supply for particular industries and jobs, the information provided in Section 2 of the report can be used to assist employers to understand the region's current educational and transportation infrastructure and general characteristics of the potential Meadowlands workforce supply. This data can also provide helpful reference material to the Meadowlands Regional Workforce Development and Sustainability Consortium as they develop detailed plans to prepare residents for current and future jobs in the Meadowlands region.

Summary of Report Contents

This report contains two main sections, as follows:

- **Section 1: A Profile of the Economic Landscape of the Meadowlands Region**
 - ❖ **Part 1:** An Overview of the Meadowlands Economy
 - ❖ **Part 2:** Key Industry Groups and Sectors in the Meadowlands Economy
- **Section 2: A Profile of the Workforce Supply and Educational Resources for the Meadowlands Region**
 - ❖ **Part 1:** Characteristics of the Workforce Supply for the Meadowlands Region
 - ❖ **Part 2:** Educational Resources Located Near the Meadowlands Region

Report Overview

Section 1: A Profile of the Economic Landscape of the Meadowlands Region

Purpose: *To identify industries and sub-sectors that are currently or potentially important to the Meadowlands regional economy.*

Understanding the Region's Key Industries and Sub-sectors

To identify industries and sub-sectors in the Meadowlands Region that are important for both economic and workforce development reasons, the Heldrich Center chose *three primary criteria*, as follows:

- **Large numbers of jobs**
- **Significant recent or expected future growth**
- **Concentration of employment in the Meadowlands with respect to New Jersey**

In addition to displaying the above information for each industry and sub-sector, each part of this section provides information on **average wages** for the industries and sectors in the Meadowlands region. Part 2 also provides statewide information on the **top five occupations** in each of three training categories.

This information was derived from:

- An analysis of available **labor market information**
(see Section 1 for more information on data sources)
- **Interviews with experts** in the region's economy and future development plans.
(See Acknowledgements for a list of those interviewed)

Report Overview

Section 2: A Profile of the Workforce Supply and Educational Resources for the Meadowlands Region

Purpose: *To better understand the general characteristics of the workforce in the Meadowlands, as well as the major transportation and education resources available in and around the region.*

Understanding the Workforce in the Meadowlands and Mapping Key Transportation and Education Resources

The Heldrich Center profiled the following characteristics of the region's workforce:

- **Where Meadowlands workers live (including the number and percentage of Meadowlands workers that live in major commutershed areas)**
- **Education levels of adults living in major commutershed areas for the Meadowlands**
- **The portion of the population in each commutershed area that lacks access to a vehicle**

This section of the report will also map the following resources in the Meadowlands region:

- Local bus routes
- Major highways
- Degree-granting higher education institutions in and around the Meadowlands region

Information on secondary and postsecondary programs that address the education and training needs of industry groups identified in Section 1 of this report is also included. *For more information on data sources, see Section 2.*

Note: *This section of the report is intended primarily as a reference for future economic and workforce planning purposes. It is not intended to assess the adequacy of the workforce supply for particular industries or jobs. See the introduction to Section 2 for more information.*

SECTION 1: A PROFILE OF THE ECONOMIC LANDSCAPE OF THE MEADOWLANDS REGION

PART 1:

OVERVIEW OF THE ECONOMIC LANDSCAPE OF THE MEADOWLANDS REGION

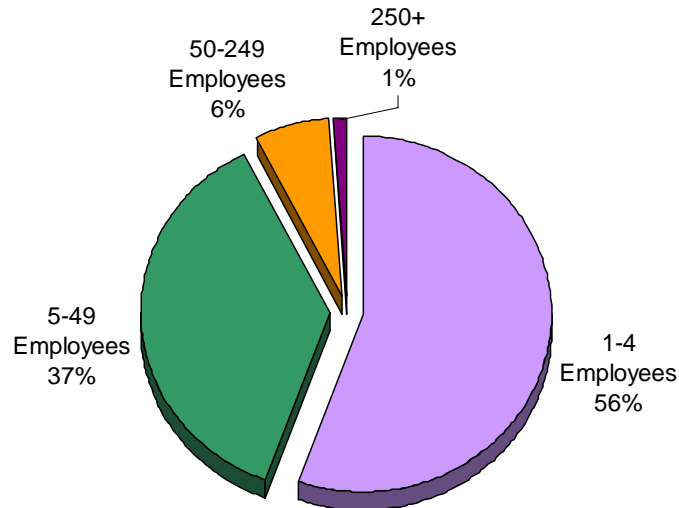
The Meadowlands Regional Economy: An Overview

The Meadowlands region is a unique geographic and economic area located at the crossroads of the state's major transportation and population centers. With most areas easily accessible to New York City and the surrounding metropolitan area, the Meadowlands is an attractive site for many types of businesses.

Key Facts

- **154,331 total employment** in 2005 (4th quarter) in the Meadowlands region¹
- **9,322 business establishments**¹
 - The overwhelming majority (93%) of business establishments in the Meadowlands employed *fewer than 50 workers* in 2004 and most employed fewer than 5.²

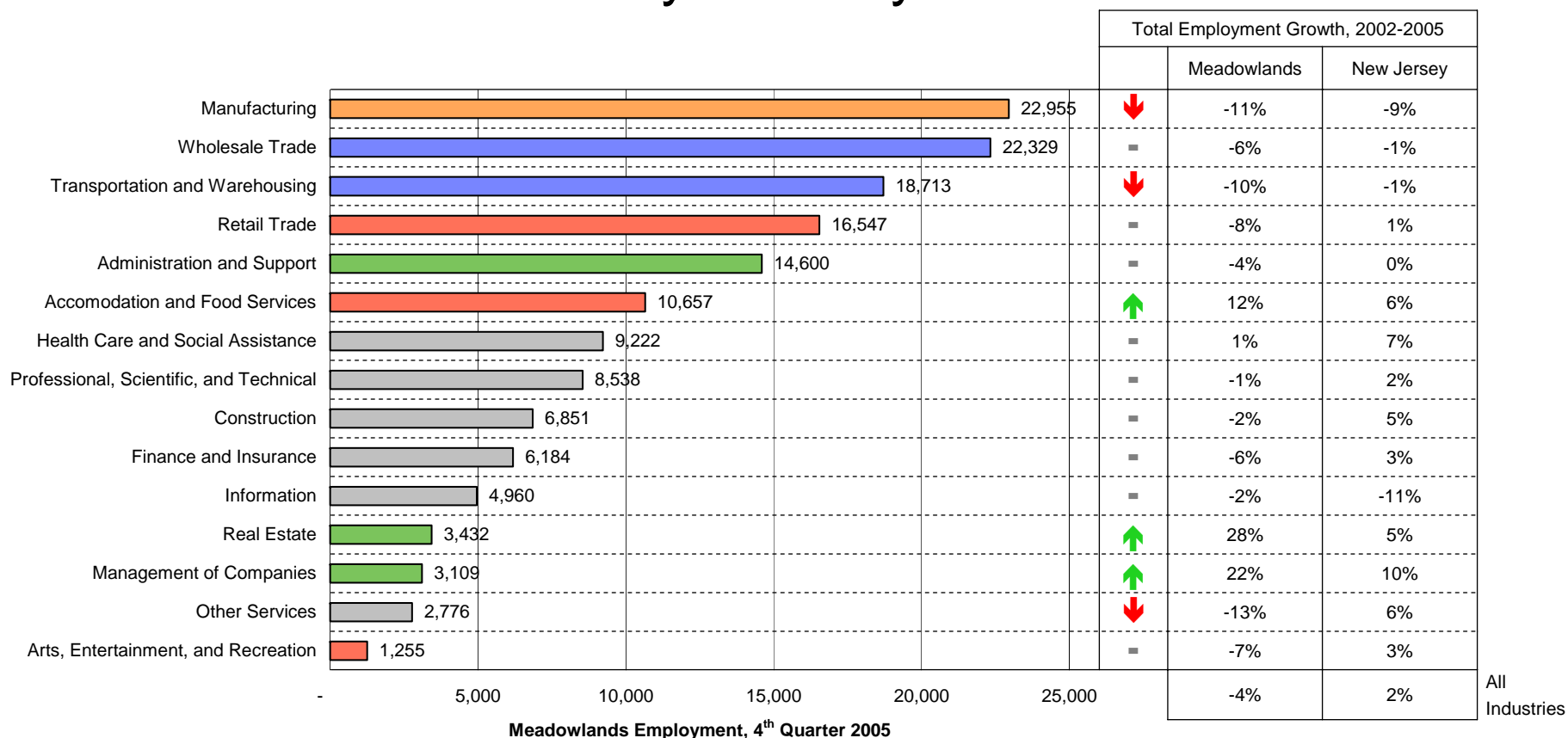
Distribution of Business Establishments in the Meadowlands Region by Size, 2004



1. New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

2. U.S. Census Bureau, Zip Code Business Patterns, 2004

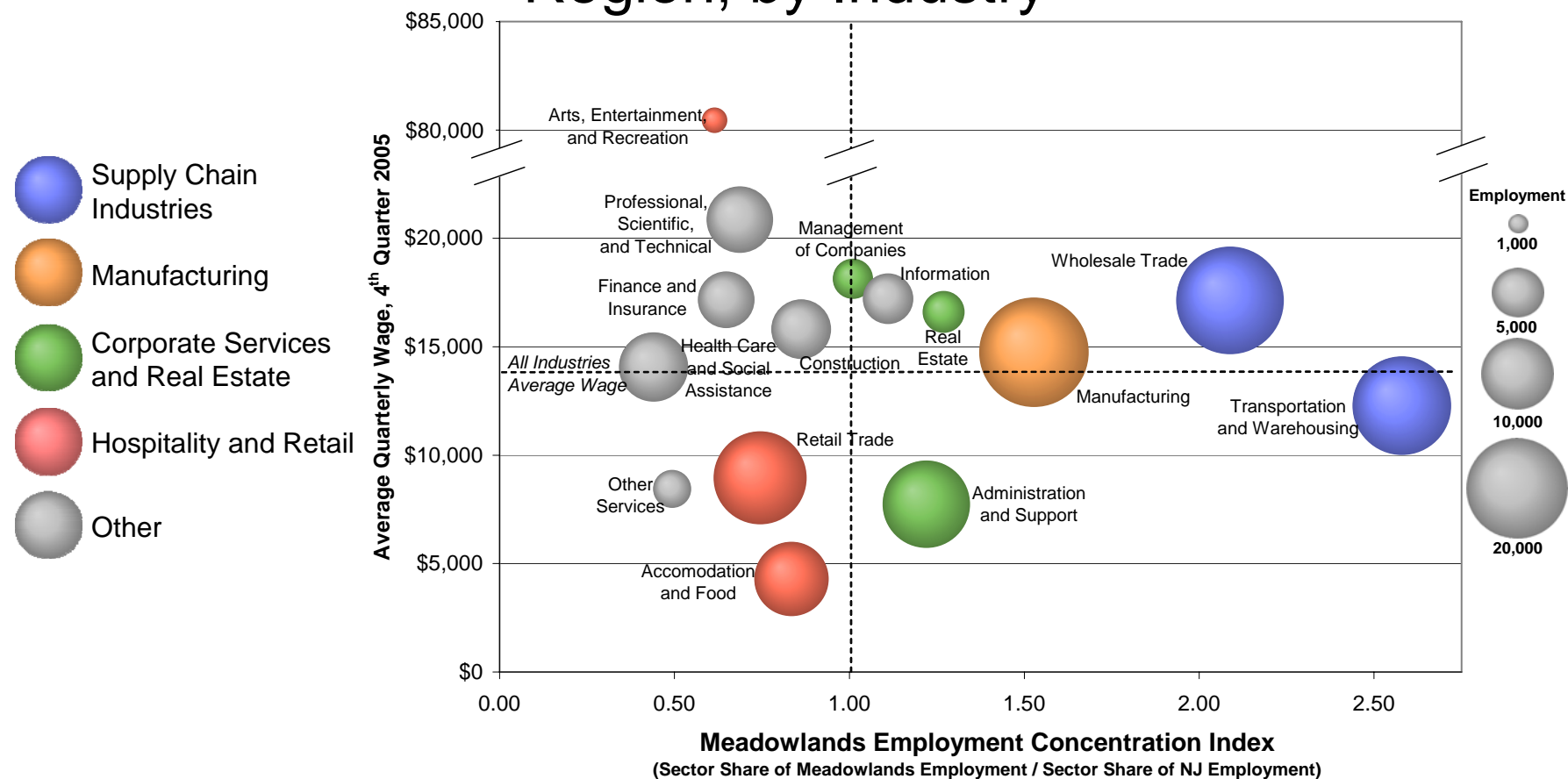
Employment and Growth in the Meadowlands Region, by Industry



Manufacturing, Wholesale Trade, and Transportation and Warehousing together comprise 42% of all employment in the Meadowlands. However, two out of three of these industries shrank by more than 10% in the Meadowlands over the past several years. In **Transportation and Warehousing**, employment shrank significantly faster in the Meadowlands than it did for the state as a whole.

Accommodation and Food Services, which also has significant employment, as well as **Real Estate** and **Management of Companies** have all grown more than 10% between 2002 and 2005, greatly exceeding statewide growth rates for these industries.

Wages and Employment Concentration in the Meadowlands Region, by Industry



Transportation and Warehousing, Wholesale Trade, and Manufacturing, the region's three largest sectors, are highly concentrated in the Meadowlands compared to the state as a whole. This may indicate that the region provides key strategic advantages for these industries. Of the three, **Wholesale Trade** and **Manufacturing** offer above-average wages compared to the mean wage for all industries in the Meadowlands region.

Two industries with significant employment, **Retail Trade** and **Accommodation and Food Services**, both provide wages that are below the average for the region. Wages in the **Arts, Entertainment, and Recreation** industry are particularly high due to the wages earned by professional athletes.

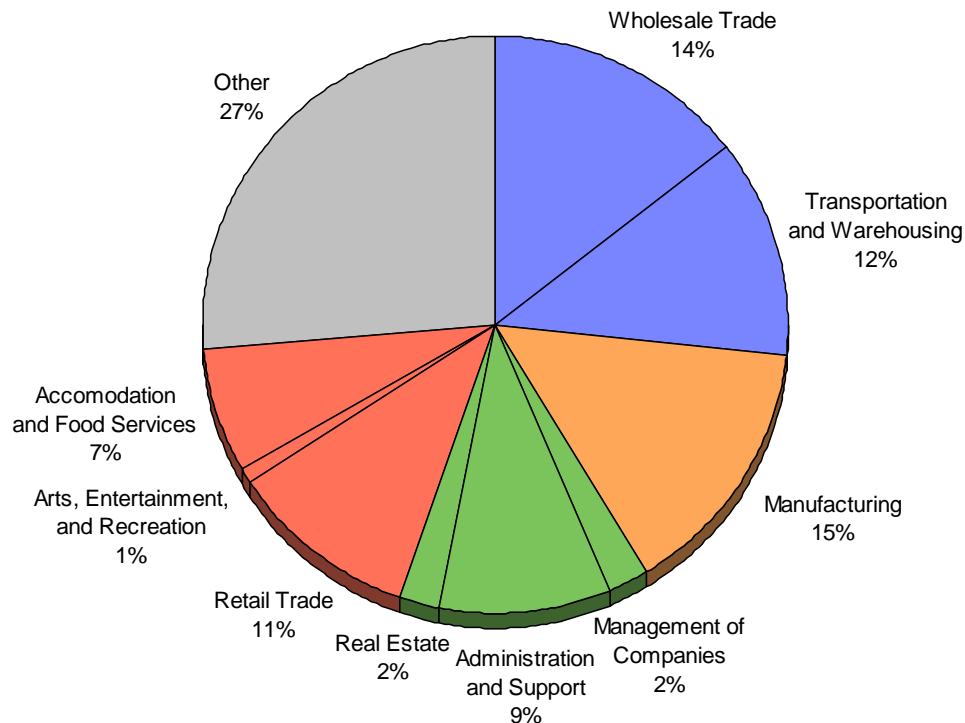
SECTION 1: A PROFILE OF THE ECONOMIC LANDSCAPE OF THE MEADOWLANDS REGION

PART 2:

KEY INDUSTRY GROUPS AND SECTORS IN THE MEADOWLANDS ECONOMY

Four Industry Groups Important to the Meadowlands Economy

Employment Distribution by Industry
in the Meadowlands Region,
Fourth Quarter 2005



Major Other Industries:

Health Care and Social Assistance	6%
Professional, Scientific, and Technical	6%
Construction	4%
Finance and Insurance	4%
Information	3%
Other Services	2%

Supply Chain Industries:

Wholesale Trade; Transportation and Warehousing

- High Employment
- Highly Concentrated in Meadowlands

Manufacturing

- High Employment
- Highly Concentrated in Meadowlands

Corporate Services and Real Estate:

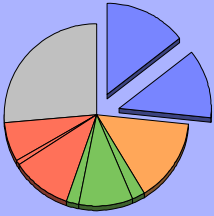
Management of Companies;
Administration and Support Services and
Waste Management; Real Estate

- Significant Employment (Admin. and Support)
- Recent High Growth (Real Estate; Mgmt. of Companies)
- Highly Concentrated in Meadowlands (Admin. and Support; Real Estate)

Hospitality and Retail:

Retail Trade;
Arts, Entertainment, & Recreation;
Accommodation & Food Services

- Expected Future High Growth Due to Planned Developments (e.g., Xanadu, En-Cap)
- Significant Employment (Accom. and Food; Retail)
- Recent High Growth (Accom. and Food)



Key Industry Group 1: Supply Chain Industries

Wholesale Trade; Transportation and Warehousing

Close to major transportation hubs and the New York, Connecticut, and New Jersey consumer markets, the Meadowlands is a major location for goods movement, storage, and distribution businesses. The Wholesale Trade and Transportation and Warehousing industries comprise the core of this supply chain.

Wholesale Trade

The largest industry in the Meadowlands region, wholesalers generally act as intermediaries in the distribution process. Wholesale operators in the region purchase goods from producers and rely on the transportation sector to distribute these goods to retailers, and end consumers in the New York/New Jersey metro area and beyond.

Key Facts

For Meadowlands Region:

Total Employment ¹	22,329
Establishments ¹	1,155
% fewer than 10 workers ²	66%
% fewer than 50 workers ²	91%
Average Quarterly Wages ¹	\$17,128

For Bergen and Hudson Counties:

Quarterly Turnover ³	7.9%
New Hires per quarter ³	6,027
Net Jobs Added per quarter ³	222

Transportation and Warehousing

The third largest industry in the region, this industry is comprised of businesses that plan and implement goods movement and storage. Highly connected to the wholesale industry and the next step in the supply chain after goods leave the warehouse, this industry is an important component of the Meadowlands economy.

Key Facts

For Meadowlands Region:

Total Employment ¹	18,713
Establishments ¹	679
% fewer than 10 workers ²	62%
% fewer than 50 workers ²	87%
Average Quarterly Wages ¹	\$12,280

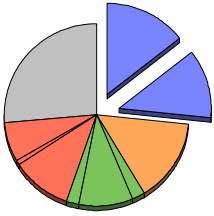
For Bergen and Hudson Counties:

Quarterly Turnover ³	9.9%
New Hires per quarter ³	5,898
Net Jobs Added per quarter ³	503

1. New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, Fourth Quarter 2005.

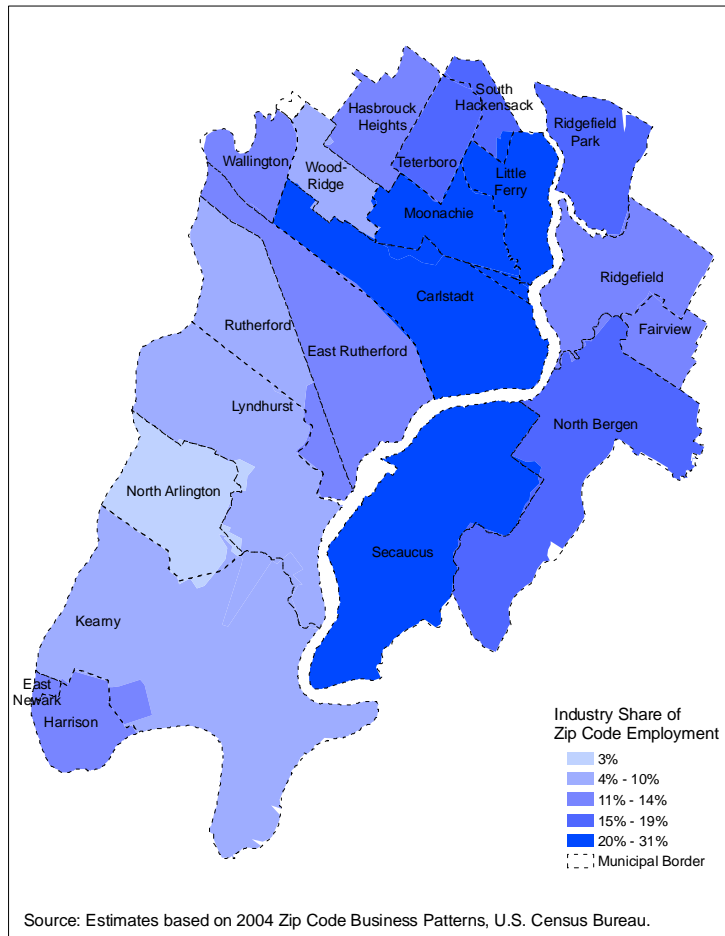
2. U.S. Census Bureau, Zip Code Business Patterns, 2004.

3. U.S. Census Bureau, Local Employment Dynamics – Quarterly Workforce Indicators, Fourth Quarter 2004-Third Quarter 2005.

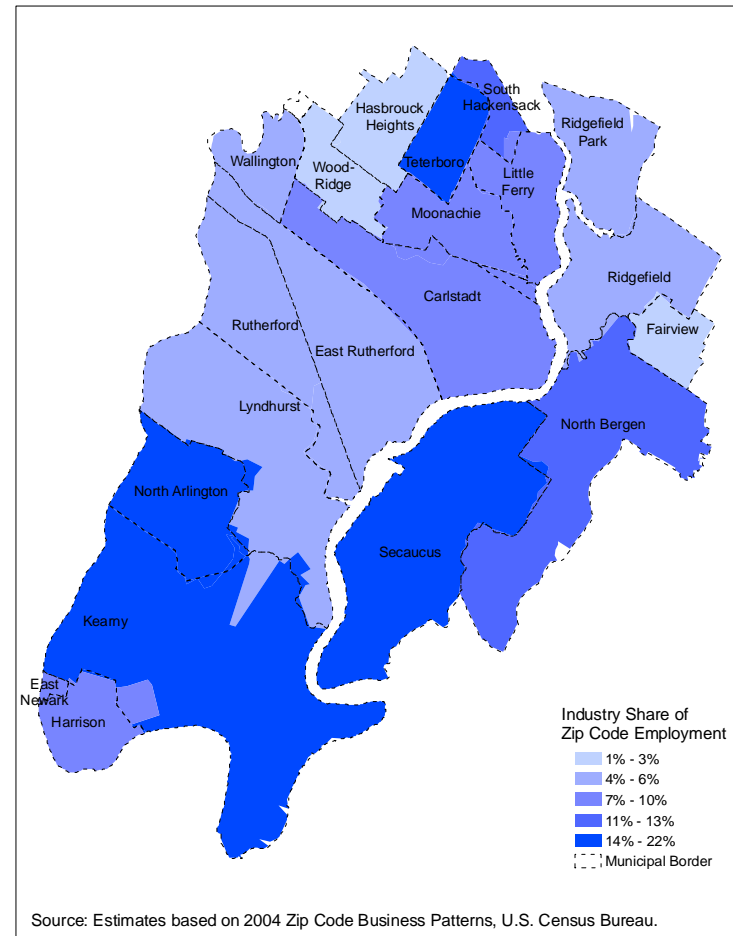


Supply Chain Industries: Local Concentration of Employment in the Meadowlands Region

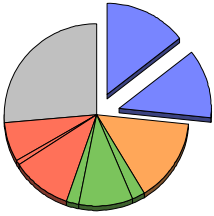
Wholesale Trade



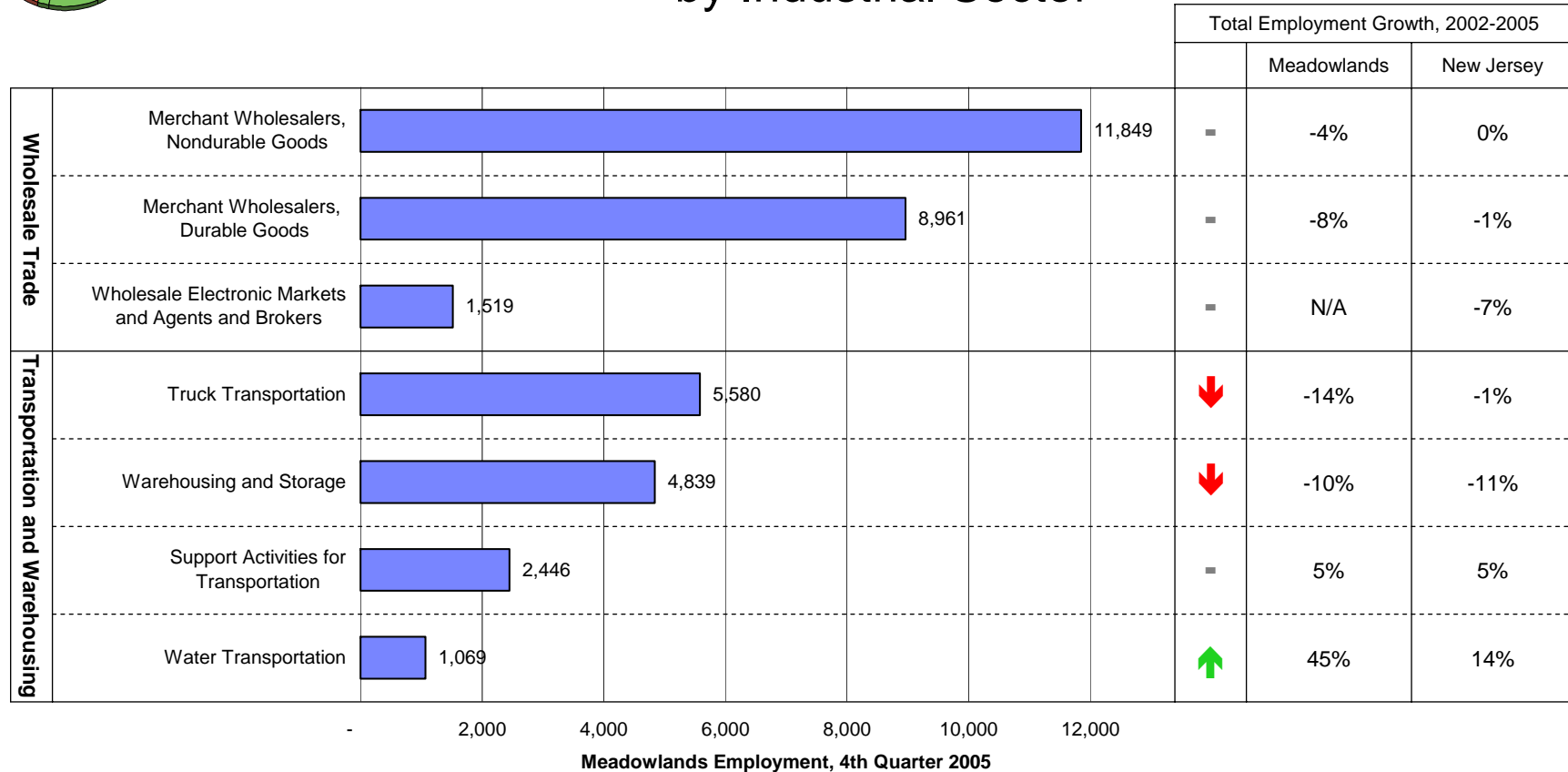
Transportation and Warehousing



- **Wholesale Trade** activity is concentrated in the northern and eastern parts of the Meadowlands region, within short distance of major markets in New York City and northern New Jersey.
- **Transportation and Warehousing** employment is concentrated more in the eastern and southern parts of the region, closer to transportation hubs including Port Newark/Elizabeth, key rail lines, and Newark Airport.

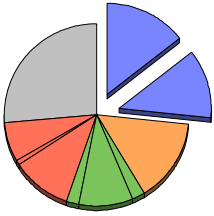


Supply Chain Industries: Employment and Growth in the Meadowlands Region, by Industrial Sector

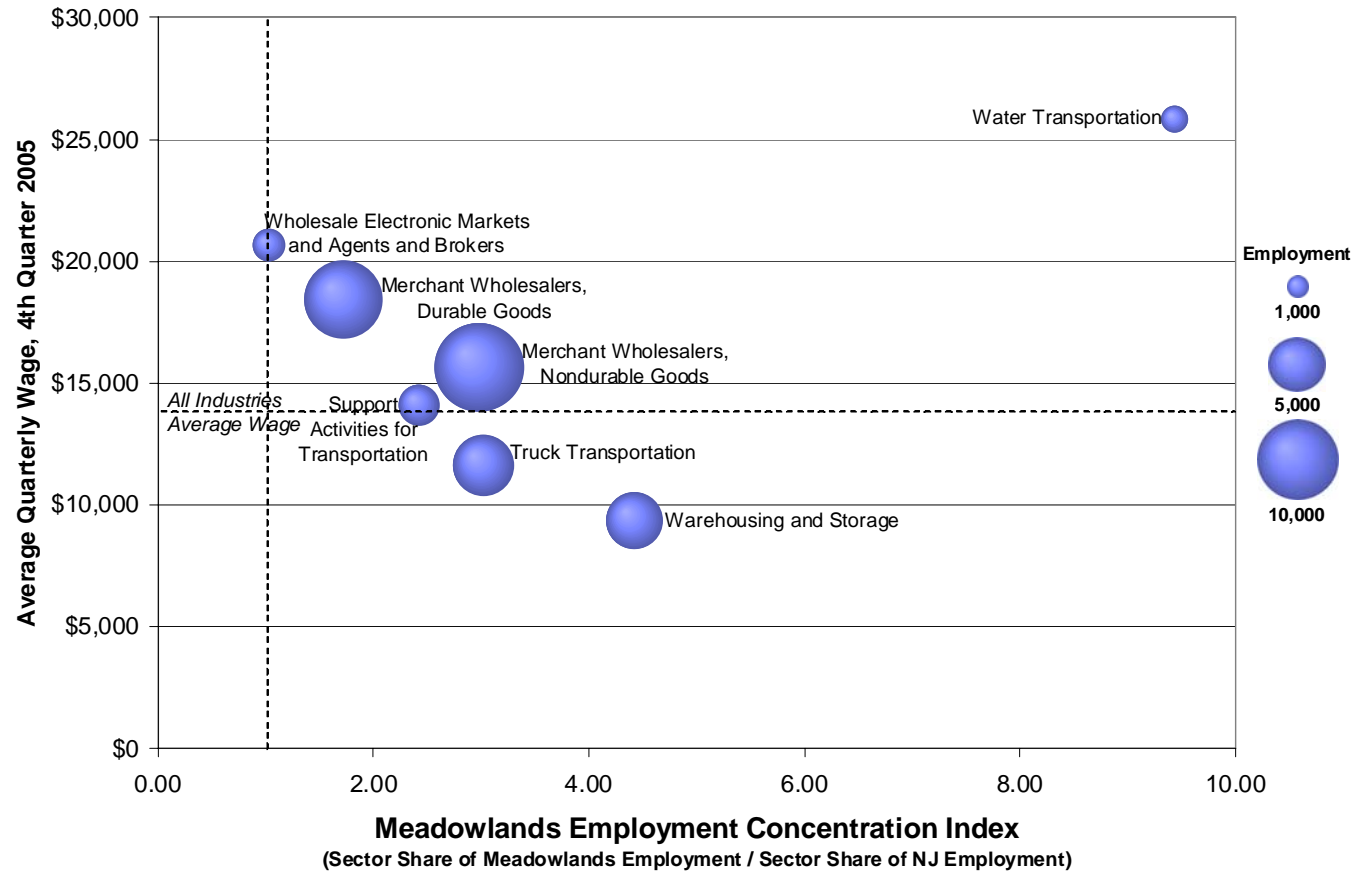


Ninety-three percent of Wholesale Trade jobs in the Meadowlands region are concentrated in the **Nondurable** and **Durable Goods** sectors, which have both declined slightly (-4% and -8%, respectively), exceeding the rate of decline for these industries statewide (0% and -1%).

In Transportation and Warehousing, **Water Transportation** grew significantly in the Meadowlands (45% growth) compared to the state (14%), most likely in response to growing cargo shipments arriving through nearby Port Newark/Elizabeth. The **Truck Transportation** and **Warehousing and Storage** sectors comprise 75% of industry employment in the region. However, regional employment in both of these sectors declined by more than 10% between 2002 and 2005. In the case of **Warehousing and Storage**, the decline follows a statewide trend (-10% in the Meadowlands vs. -11% statewide). However, employment declined significantly faster in the Meadowlands for the **Truck Transportation** sector compared to the state (-14% in the Meadowlands vs. -1% statewide).

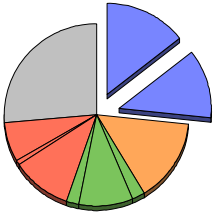


Supply Chain Industries: Wages and Employment Concentration in the Meadowlands Region, by Industrial Sector



All sectors in the Wholesale Trade industry pay higher-than-average wages in the Meadowlands region. Jobs in the industry's two largest sectors in the region, **Durable** and **Nondurable Goods**, are significantly more concentrated in the Meadowlands than they are throughout the state.

While all Transportation sectors are highly concentrated in the Meadowlands compared to the state, the two largest sectors in the region, **Truck Transportation** and **Warehousing and Storage**, pay lower than average wages.



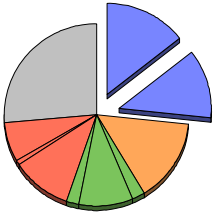
Supply Chain Industries: Key Trends and Planned Developments That May Affect Future Industry Growth

Recent and future expected growth in cargo shipments at Port Newark/Elizabeth is likely to affect the future growth of Supply Chain industries in the region. According to a report commissioned by the New York Shipping Authority, more than \$132 billion worth of goods entered through The Ports of New York and New Jersey in 2005, much of this through Port Newark/Elizabeth. Based on recent growth in cargo shipments due to increasing globalization and improvement being made to facilities at Port Newark/Elizabeth, the New York Shipping Association predicts a fourfold increase in cargo handling in the region's ports by 2040. These ports rely on the area's transportation and warehousing and wholesale trade industries to move and distribute goods to consumer markets. As a result, this projected growth in cargo shipments may increase the number of jobs in Supply Chain industries in and around the Meadowlands region.¹

According to regional experts interviewed for this report, several planned developments in the Transportation and Warehousing and Wholesale Trade industries are expected to occur over the next 5-10 years that have the potential to attract new employers and jobs to the region. (See acknowledgements for a list of individuals interviewed). Key developments noted by interviewees include:

- **Portfields development** – The Port Authority of New York and New Jersey has selected two small sites near Kearney to include in its Portfields project. The project is designed to remediate brownfields sites near Port Newark/Elizabeth to prepare them for re-use as warehousing sites.
- **Secaucus Junction warehouse project** – The Rockefeller Development group plans to develop 500,000 sq. feet of warehousing space on 40 acres near Secaucus Junction.
- **Kearney/Belleville Turnpike project** – A developer has plans to create high-end office and warehousing space along the Belleville Turnpike near Kearney. According to the New Jersey Meadowlands Commission, the developer has completed one building and has applied for permits to develop two more.
- **Teterboro/Honeywell Development** – A developer is redeveloping a 55-acre industrial site off of Paterson Plank Road near Teterboro that will contain the company headquarters for Honeywell, Inc., as well as several acres of industrial warehousing space.

Source: Lahr, Michael. (2005) *Economic Impacts of the New York/New Jersey Port Industry 2004*.



Supply Chain Industries: Workforce Opportunities, New Jersey Statewide Data

Wholesale Trade

- Jobs in New Jersey in the wholesale trade industry are concentrated in Office and Administrative Support (28%), Transportation and Material Moving (24%), and Sales (20%).
- The largest occupations in the industry have low training requirements, including Sales Representatives (comprising 11% of industry employment statewide) and Laborers and Freight, Stock and Materials Movers (8%).
- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree

- Sales Representatives (19% growth)
- Packers and Packagers, Hand (19%)

Jobs requiring an Associates degree or higher

- Sales Managers (24%)
- Financial Managers (19%)
- Accountants and Auditors (19%)

Warehousing and Transportation

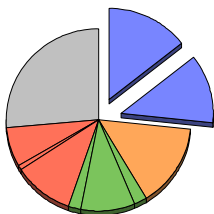
- Over half (58%) of jobs in the state's Transportation and Warehousing industry are concentrated in transportation and material moving occupations, while nearly a quarter (22%) are found in office and administrative support occupations.
- The industry's largest occupations have low training requirements, including Tractor-Trailer Truck Drivers (comprising 12.6% of industry employment statewide) and Laborers and Freight, Stock and Materials Movers (11.4%).
- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree

- Flight Attendants (26% growth)
- School Bus Drivers (16%)
- Truck Drivers, Light or Delivery Services (15%)

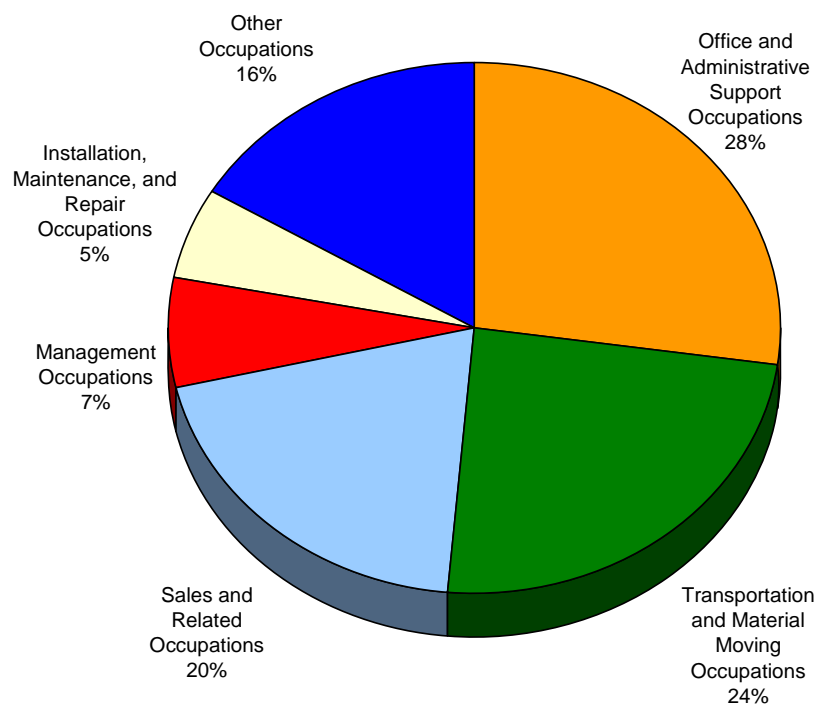
Jobs requiring an Associates degree or higher

- Airline Pilots, Copilots, and Flight Engineers (27%)
- Business Operations Specialists (23%)



Occupations in the Wholesale Trade Industry, New Jersey Statewide Data, 2004

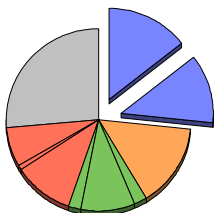
Distribution by
Occupational Groups



Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.

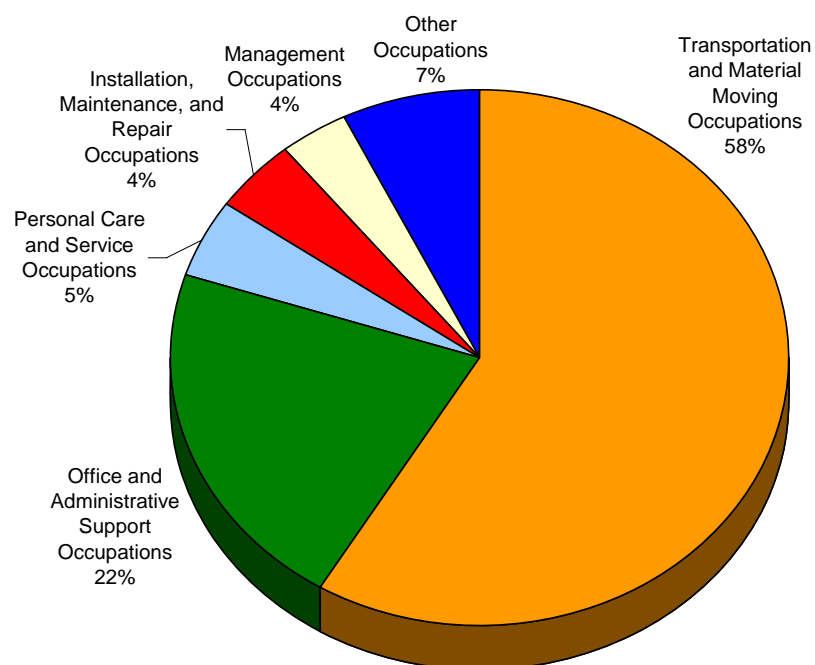
Top Occupations by Training Requirements

Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Sales Representatives, Wholesale and Manufacturing, except Technical and Scientific Products	11.4%	19%	\$60,870
Laborers and Freight, Stock, and Material Movers, Hand	8.4%	9%	\$21,330
Office Clerks, General	3.7%	5%	\$27,440
Packers and Packagers, Hand	3.4%	19%	\$17,700
Shipping, Receiving, and Traffic Clerks	3.4%	8%	\$29,190
Long-term on-the-job training / work experience / some postsecondary training			
First-Line Supervisors/Managers of Non-Retail Sales Workers	1.9%	9%	\$91,380
First-Line Supervisors/Managers of Office and Administrative Support Workers	1.7%	8%	\$54,520
First-Line Supervisors/Managers of Helpers, Laborers, and Material Movers, Hand	1.1%	16%	\$45,540
Computer, Automated Teller, and Office Machine Repairers	0.9%	7%	\$40,720
Wholesale and Retail Buyers, except Farm Products	0.9%	13%	\$54,490
Associates degree or higher			
General and Operations Managers	2.7%	17%	N/A
Accountants and Auditors	1.2%	19%	\$62,620
Computer Programmers	0.9%	-4%	\$75,360
Sales Managers	0.8%	24%	\$133,220
Financial Managers	0.8%	19%	\$111,190



Occupations in the Transportation and Warehousing Industry, New Jersey Statewide Data, 2004

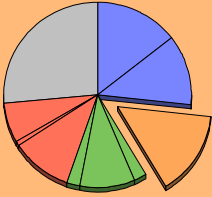
Distribution by
Occupational Groups



Top Occupations by Training Requirements

Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Truck Drivers, Heavy and Tractor-Trailer	12.6%	11%	\$37,920
Laborers and Freight, Stock, and Material Movers, Hand	11.4%	2%	\$21,320
Truck Drivers, Light or Delivery Services	6.9%	15%	\$37,420
Bus Drivers, School	6.8%	16%	\$26,000
Industrial Truck and Tractor Operators	4.0%	4%	\$32,390
Long-term on-the-job training / work experience / some postsecondary training			
Flight Attendants	3.0%	26%	\$64,450
First-Line Supervisors/Managers of Transportation and Material-Moving Machine and Vehicle Operators	1.8%	13%	\$57,210
Bus and Truck Mechanics and Diesel Engine Specialists	1.6%	13%	\$40,170
First-Line Supervisors/Managers of Office and Administrative Support Workers	1.3%	4%	\$55,660
First-Line Supervisors/Managers of Helpers, Laborers, and Material Movers, Hand	1.0%	-2%	\$43,810
Associates degree or higher			
General and Operations Managers	1.6%	11%	\$125,400
Airline Pilots, Copilots, and Flight Engineers	1.5%	27%	\$120,100
Accountants and Auditors	0.3%	12%	\$57,770
Financial Managers	0.3%	11%	\$109,590
Business Operations Specialists, All Other	0.2%	23%	\$59,710

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Key Industry Group 2:

Manufacturing

Manufacturing

The largest industry in the Meadowlands, Manufacturing has long been an important economic engine in the region. From Printing and Related Support Activities, to Apparel and Food manufacturers and a number of others, Manufacturers in the Meadowlands produce and/or assemble goods for a wide variety of businesses in the region and across the nation.

Key Facts

For Meadowlands Region:

Total Employment ¹	22,955
Establishments ¹	688
% fewer than 10 workers ²	45%
% fewer than 50 workers ²	81%
Average Quarterly Wages ¹	\$14,737

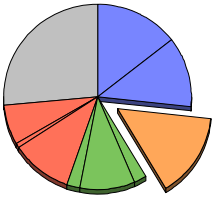
For Bergen and Hudson Counties:

Quarterly Turnover ³	7.8%
New Hires per quarter ³	5,377
Net Jobs Added per quarter ³	-72

1. New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, Fourth Quarter 2005.

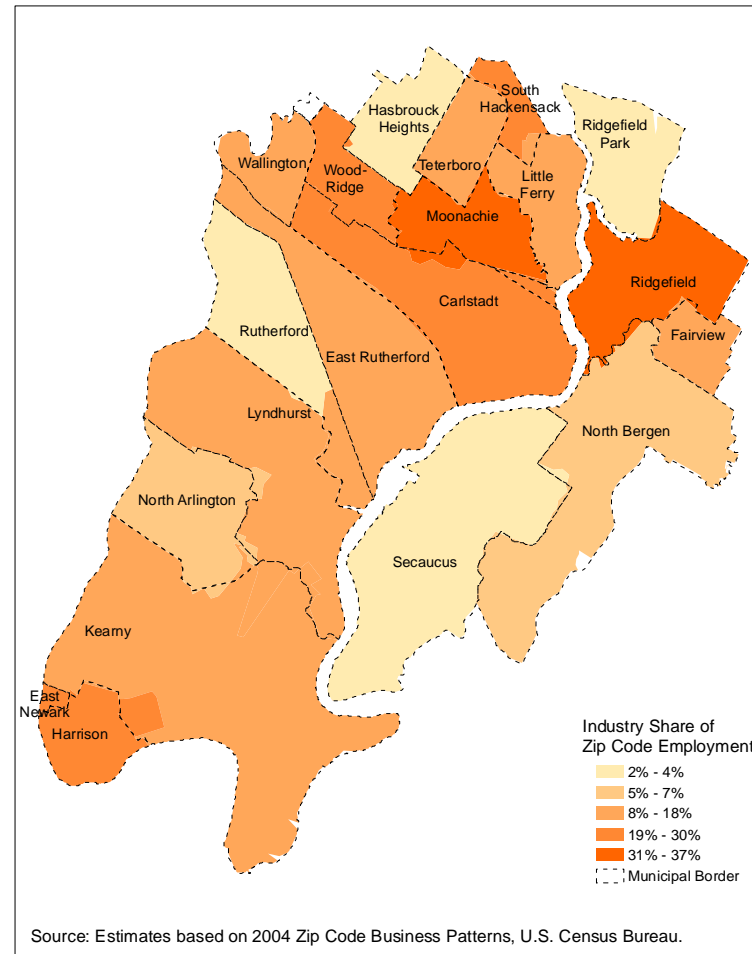
2. U.S. Census Bureau, Zip Code Business Patterns, 2004.

3. U.S. Census Bureau, Local Employment Dynamics – Quarterly Workforce Indicators, Fourth Quarter 2004-Third Quarter 2005.

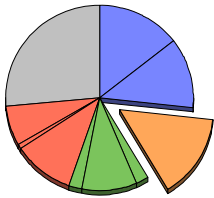


Manufacturing:

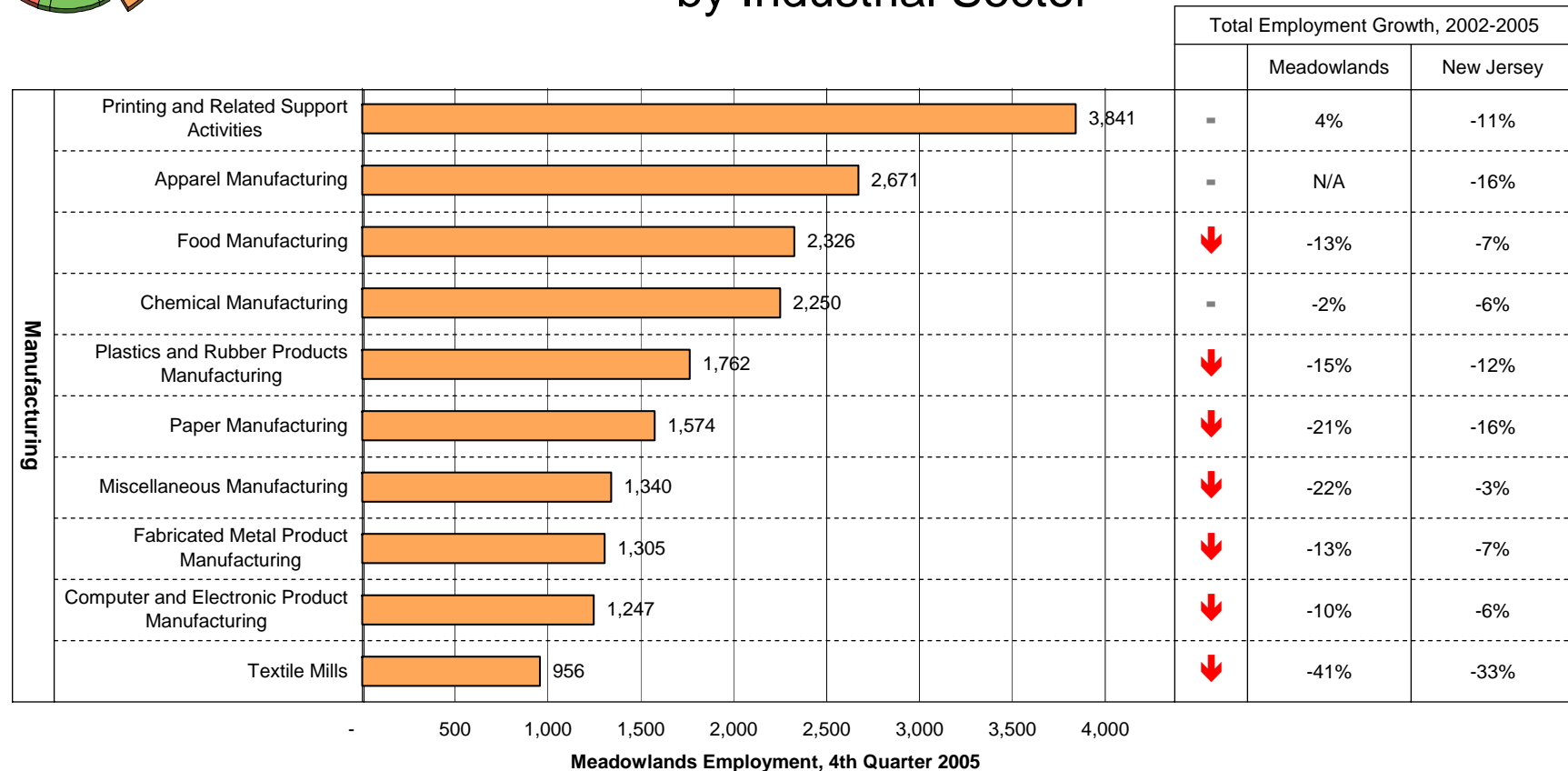
Local Concentration of Employment in the Meadowlands Region



- **Manufacturing** employment is concentrated in the northern parts of the Meadowlands, as well as in Harrison in the south.

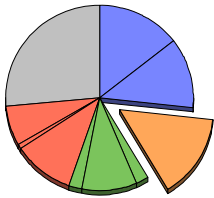


Manufacturing Industry: Employment and Growth in the Meadowlands Region, by Industrial Sector

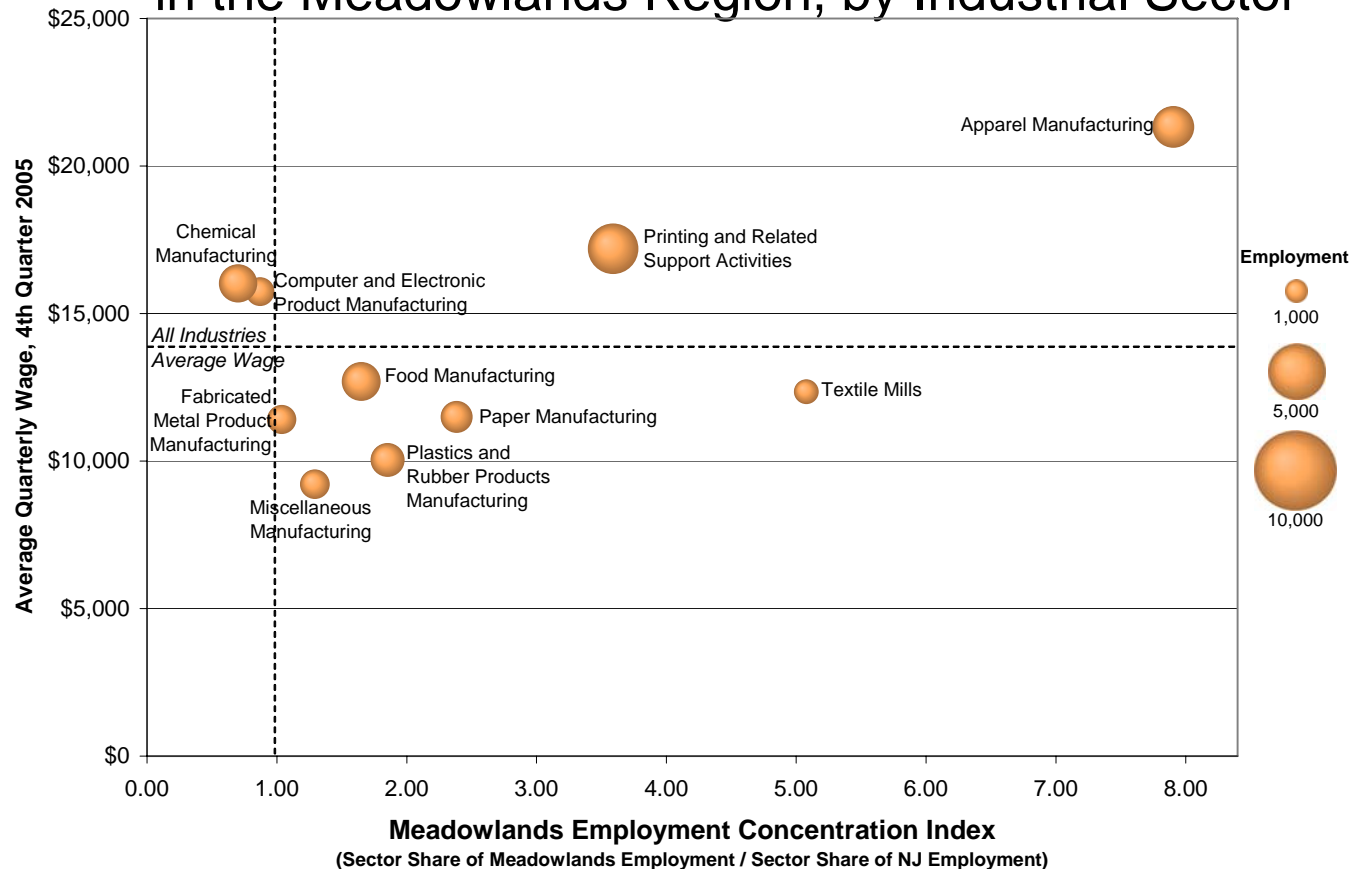


Manufacturing employment in the Meadowlands is diverse. **Printing and Related Support Activities** and **Apparel and Food Manufacturing** are the largest industry sectors, together comprising 39% of industry jobs in the region. **Printing and Related Support Activities** is the only Manufacturing sector in the region that added jobs between 2002 and 2005. While job growth was modest in this sector (4%), this rate far exceeded the sector's 11% decline statewide.

Regional employment declined by more than 10% in most Manufacturing sectors. The most significant rates of job decline occurred in **Textile Mills** (-41%), **Miscellaneous** (-22%), and **Paper Manufacturing** (-21%), all of which shed jobs at a higher rate in the Meadowlands than they did statewide. Jobs in **Food and Fabricated Metal Manufacturing** also shrank faster in the Meadowlands than they did across New Jersey between 2002 and 2005.

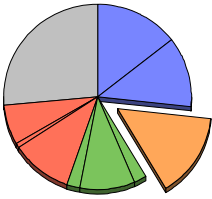


Manufacturing Industry: Wages and Employment Concentration in the Meadowlands Region, by Industrial Sector



Apparel Manufacturing, Textile Mills, and Printing and Related Support Activities are the most highly concentrated Manufacturing sectors in the Meadowlands region compared to the state. Of these, **Apparel Manufacturing** and **Printing**, both of which provide significant employment in the region, offer the highest wages. By contrast, **Miscellaneous and Plastics and Rubber Manufacturers** pay the lowest wages, lagging significantly below the average wage for all industries in the Meadowlands.

Chemical, Computer and Electronic, and Fabricated Metal Manufacturing jobs are not highly concentrated in the region compared to the state. However, the first two of these sectors offer above-average wages for the region.



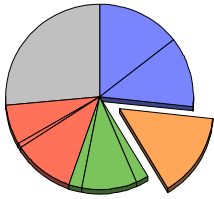
Manufacturing:

Workforce Opportunities, New Jersey Statewide Data

Manufacturing

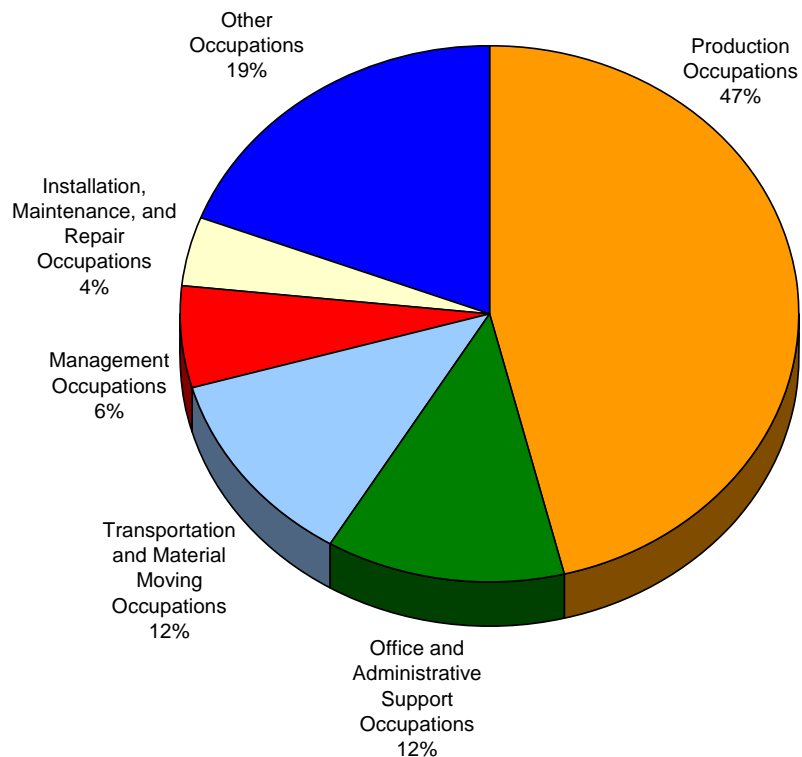
- Nearly half (47%) of jobs in the state's Manufacturing industry are concentrated in production occupations.
- Due to the large number of specialized industry sectors, no individual occupation comprises a large share of the industry's workforce. The industry's largest single occupation, First-Line Supervisors/Managers of Production and Operating workers, comprises only 3.9% of industry employment in New Jersey and requires a moderate level of training. Manufacturing's other top occupations have lower training requirements, including Packers and Packagers (3.6%), Laborers and Freight, Stock, and Material Movers (3.4%), and Packaging and Filling Machine Operators and Tenders (3.4%).
- While none of the Manufacturing industry's top occupations are projected to grow statewide from 2004-2014, those that are projected to diminish the least include:
 - Jobs requiring less than an Associates degree*
 - Packers and Packagers (-12% growth)
 - Industrial Machinery Mechanics (-13%)
 - Jobs requiring an Associates degree or higher*
 - Chemists (-10%)
 - Chemical Technicians (-10%)

Note: While new jobs are not being created in these areas, employers will still need to hire a significant number of replacement workers to fill existing jobs.



Occupations in the Manufacturing Industry, New Jersey Statewide Data, 2004

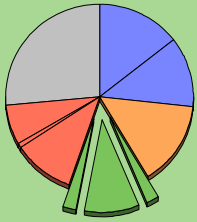
Distribution by
Occupational Groups



Top Occupations by Training Requirements

Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Packers and Packagers, Hand	3.6%	-12%	\$16,660
Laborers and Freight, Stock, and Material Movers, Hand	3.4%	-22%	\$23,010
Packaging and Filling Machine Operators and Tenders	3.4%	-19%	\$22,570
Team Assemblers	2.6%	-17%	\$22,240
Inspectors, Testers, Sorters, Samplers, and Weighers	2.4%	-20%	\$28,040
Long-term on-the-job training / work experience / some postsecondary training			
First-Line Supervisors/Managers of Production and Operating Workers	3.9%	-14%	\$52,180
Machinists	1.7%	-19%	\$34,970
Industrial Production Managers	1.2%	-14%	\$88,810
Industrial Machinery Mechanics	0.9%	-13%	\$41,730
First-Line Supervisors/Managers of Office and Administrative Support Workers	0.7%	-22%	\$53,780
Associates degree or higher			
General and Operations Managers	1.8%	-15%	N/A
Chemists	1.0%	-10%	\$64,950
Chemical Technicians	0.8%	-10%	\$39,780
Accountants and Auditors	0.6%	-14%	\$64,750
Mechanical Engineers	0.6%	-14%	\$63,040

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Key Industry Group 3: Corporate Services and Real Estate

Management of Companies and Enterprises; Administrative and Support Services and Waste Management; Real Estate

The Meadowlands is close to several large commercial and residential centers, including Jersey City, Newark, New York, and others. Several key industries in the Meadowlands provide services that support businesses in the region and beyond. These industries include Management of Companies and Enterprises and Administrative and Support Services and Waste Management. The Real Estate industry supports both commercial and residential interests in and around the Meadowlands region.

Management of Companies and Enterprises

The Meadowlands is home to a small but growing number of jobs in company headquarter operations and companies that hold security or other equity in other businesses. Between 2002 and 2005, jobs in this industry grew by 22% in the Meadowlands compared to just 10% statewide.

Key Facts

For Meadowlands Region:

Total Employment ¹	3,109
Establishments ¹	49
% fewer than 10 workers ²	30%
% fewer than 50 workers ²	57%
Average Quarterly Wages ¹	\$18,133

For Bergen and Hudson Counties:

Quarterly Turnover ³	7.2%
New Hires per quarter ³	1,173
Net Jobs Added per quarter ³	-94

Administrative and Support Services and Waste Management

Businesses that support the day-to-day operations of other companies comprise the fifth largest industry in the Meadowlands region. These firms provide services ranging from administrative support, to assisting with the hiring of personnel, to security and surveillance services, to cleaning and other services.

Key Facts

For Meadowlands Region:

Total Employment ¹	14,600
Establishments ¹	483
% fewer than 10 workers ²	69%
% fewer than 50 workers ²	88%
Average Quarterly Wages ¹	\$7,733

For Bergen and Hudson Counties:

Quarterly Turnover ³	19.5%
New Hires per quarter ³	17,170
Net Jobs Added per quarter ³	754

Real Estate

While still a small industry in the region, Real Estate was the fastest growing industry in the Meadowlands between 2002 and 2005. Growing 28% in the region compared to just 5% statewide, this industry provides jobs that involve selling, renting, or leasing commercial and residential real estate to others. Firms may also manage properties or provide other related services, such as property appraisals.

Key Facts

For Meadowlands Region:

Total Employment ¹	3,432
Establishments ¹	347
% fewer than 10 workers ²	87%
% fewer than 50 workers ²	98%
Average Quarterly Wages ¹	\$16,608

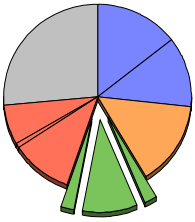
For Bergen and Hudson Counties:

Quarterly Turnover ³	9.3%
New Hires per quarter ³	1,837
Net Jobs Added per quarter ³	188

1. New Jersey Department of Labor and Workforce Development, *Quarterly Census of Employment and Wages*, Fourth Quarter 2005.

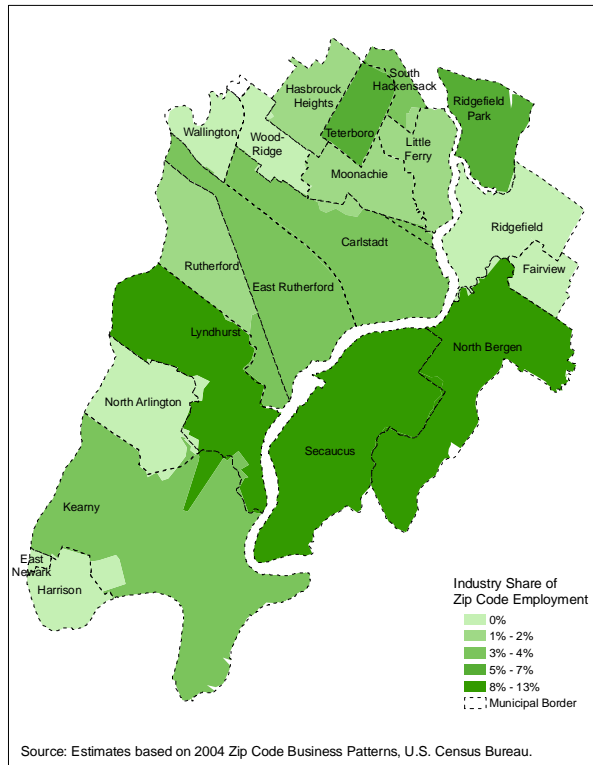
2. U.S. Census Bureau, *Zip Code Business Patterns*, 2004.

3. U.S. Census Bureau, *Local Employment Dynamics – Quarterly Workforce Indicators*, Fourth Quarter 2004-Third Quarter 2005.

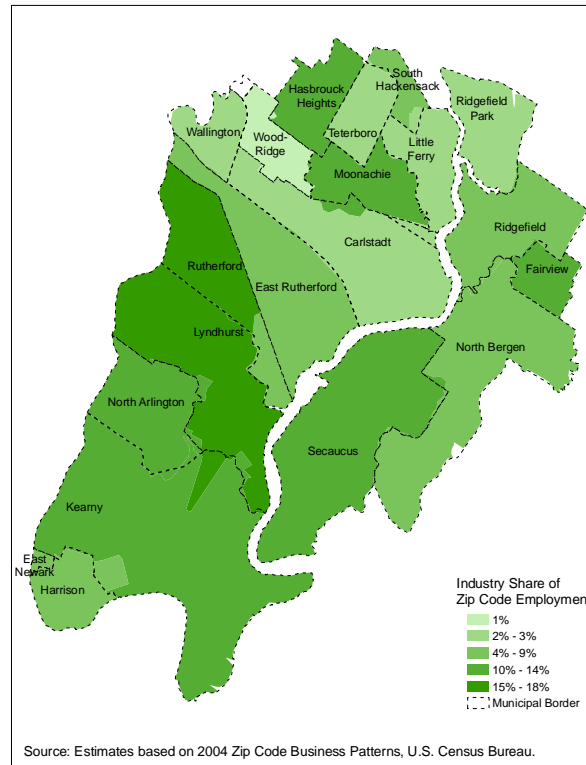


Corporate Services and Real Estate: Local Concentration of Employment in the Meadowlands Region

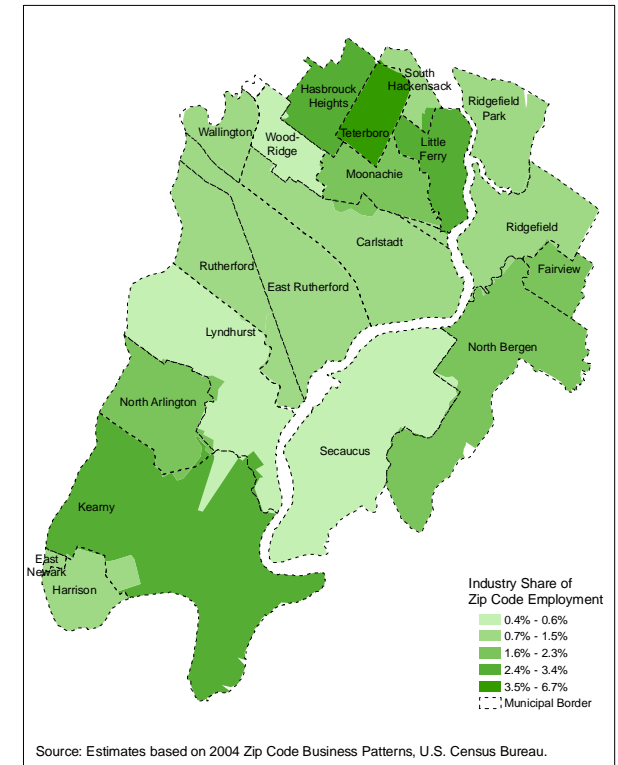
Management of Companies and Enterprises



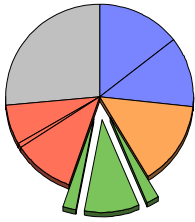
Administrative and Support and Waste Management



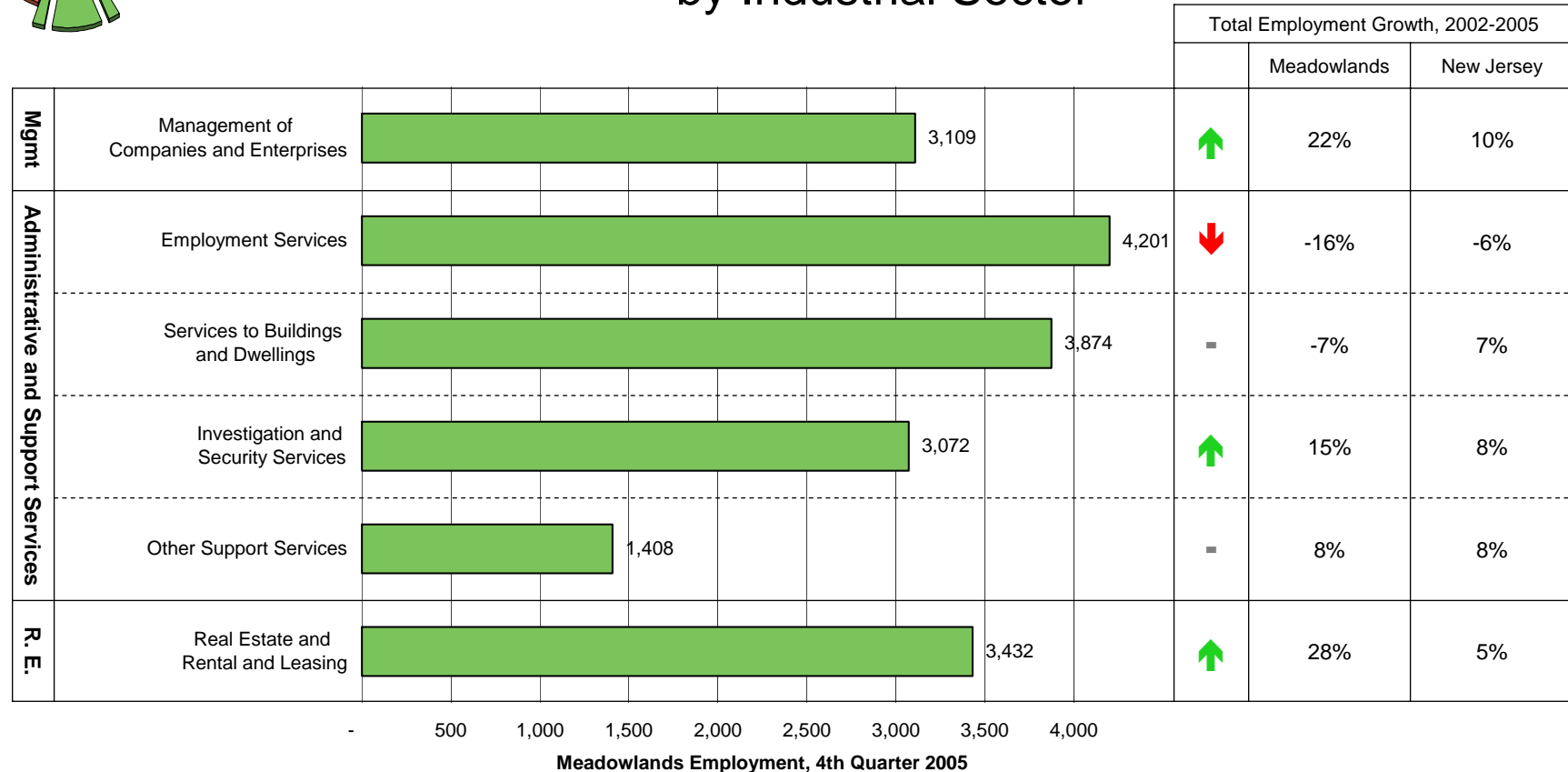
Real Estate



- Employment in **Management of Companies and Enterprises** is concentrated primarily in the eastern section of the Meadowlands region.
- **Administrative and Support and Waste Management** jobs are more evenly distributed in the region, with some density in the north and west.
- The **Real Estate** industry is most heavily concentrated in the northern and the southern parts of the Meadowlands.

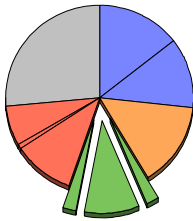


Corporate Services and Real Estate: Employment and Growth in the Meadowlands Region, by Industrial Sector

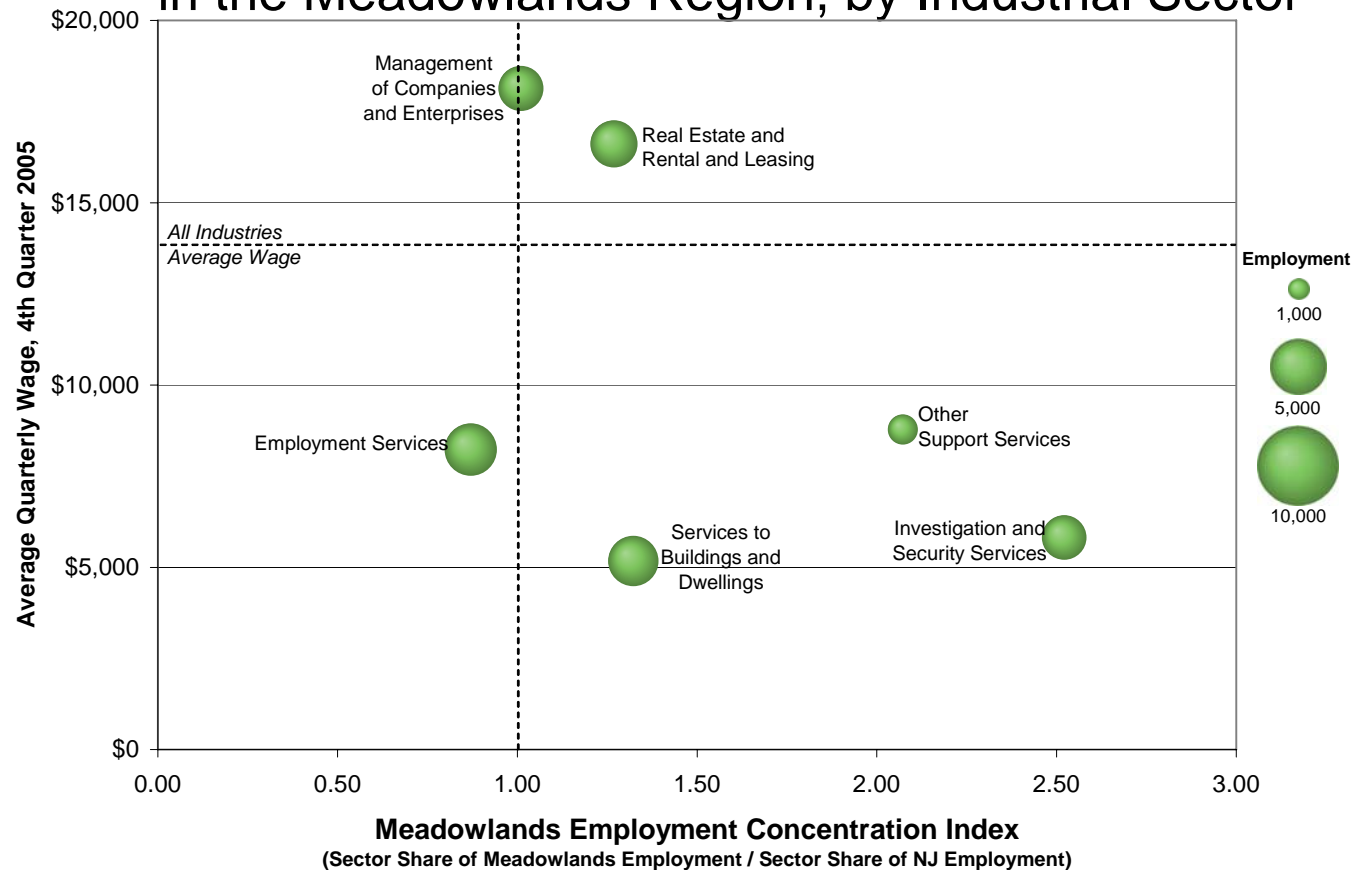


Together, the **Employment Services**, **Services to Buildings and Dwellings**, and **Investigation and Security Services** sectors comprise 71% of employment in the region's Administrative and Support Services and Waste Management industry. Of these, only **Investigation and Security Services** added jobs between 2002 and 2005. In fact, employment in this sector grew faster in the Meadowlands than in the state as a whole (15% in the Meadowlands vs. 8% statewide), while the other two industries shrank at a faster rate in the region compared to the state (-16% vs. -6% and -7% vs. 7%, respectively).

Employment in the **Management of Companies and Enterprises** and **Real Estate** industries, while relatively small in absolute terms (3,109 and 3,432, respectively), grew by more than 20% between 2002 and 2005, far outpacing growth in these industries throughout New Jersey (22% vs. 10% and 28% vs. 5%, respectively).

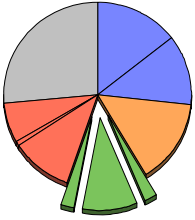


Corporate Services and Real Estate: Wages and Employment Concentration in the Meadowlands Region, by Industrial Sector



Real Estate is the only industry in this grouping that is both highly concentrated in the Meadowlands and offers higher-than-average wages. Other highly concentrated, but lower-than-average wage industries include **Investigation and Security Services**, **Other Support Services**, and **Services to Businesses and Dwellings**.

While not exceptionally concentrated in the region, average wages in the **Management of Companies and Enterprises** industry are significantly higher than the average for all industries in the region.



Corporate Services and Real Estate: Key Trends and Planned Developments That May Affect Future Industry Growth

According to regional experts interviewed for this report, residential real estate development is on the rise in the Meadowlands region. This trend may be contributing to the rapid growth in this industry in the region. A number of new office park developments are also planned for the area, which may affect a number of industries in the Corporate Services and Real Estate grouping. Key developments noted by interviewees include (See acknowledgements for a list of individuals interviewed):

En-Cap project – This ambitious landfill redevelopment project is in its very early stages and will continue to develop over the next decade. The developer plans to create 2,500 housing units, including an adult community, as well as 2 golf courses, a 350-room resort hotel, and retail and recreational facilities.

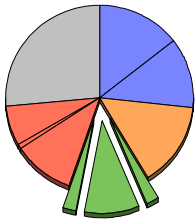
Millennium and Baker projects – These projects will create over 800 residential units, most of which will be located across from the Meadowlands Sports Complex.

Highland Cross project – This project will provide a significant amount of mixed-use commercial space in Rutherford.

Kearney/Belleville Turnpike project – A developer has plans to create high-end office and warehousing space along the Belleville Turnpike near Kearney. According to the New Jersey Meadowlands Commission, the developer has completed one building and has applied for permits to develop two more.

Teterboro/Honeywell Development – A developer is redeveloping a 55-acre industrial site off of Paterson Plank Road near Teterboro that will contain the company headquarters for Honeywell, Inc., as well as several acres of industrial warehousing space.

Secaucus Junction – Two components of the Secaucus Junction complex will add home and office space to the area. The Allied Junction component will add vertical office and residential space above the new rail transfer station. The Transit Village component will add approximately 2,200 residential units to the area surrounding the transfer station, as well as allow for the future development of commercial space.



Corporate Services and Real Estate: Workforce Opportunities, New Jersey Statewide Data

Management of Companies and Enterprises

- Statewide, jobs in this industry are concentrated in Office and Administrative Support (31%), Management (16%), and Business and Financial Operations (20%).
- Jobs in this sector are diverse, but the largest occupations in the industry have low training requirements, including Customer Service Representatives (comprising 4.1% of industry employment statewide) and Bookkeeping, Accounting and Auditing Clerks (3.9%), and Office Clerks (3.4%).

- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree
– Customer Service Representatives (16% growth)

Jobs requiring an Associates degree or higher
– Business Operations Specialists (25%)
– Computer Systems Analysts (25%)

Administrative and Support Services and Waste Management

- Nearly three-quarters (72%) of jobs in this industry in New Jersey are concentrated in three categories: Other Occupations (26%), Office and Administrative Support Occupations (24%), and Building and Grounds Cleaning and Maintenance Occupations (22%).
- The industry's largest occupations have low training requirements, including Janitors and Cleaners (comprising 11.9% of industry employment statewide), Security Guards (7.9%), and Laborers and Freight, Stock and Materials Movers (6%).

- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree
– Laborers and Freight, Stock and Materials Movers (29% growth)
– Landscaping and Groundskeeping Workers (22%)

Jobs requiring an Associates degree or higher
– Business Operations Specialists (59%)
– Registered Nurses (47%)
– Employment, Recruitment, and Placement Specialists (42%)

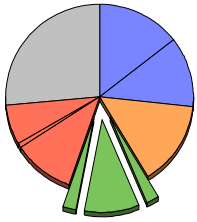
Real Estate

- Jobs in New Jersey's Real Estate industry are concentrated in Office and Administrative Support (27%), Sales and Related Occupations (22%), and Other Occupations (19%).
- The largest occupations in the industry have low training requirements, including Counter and Rental Clerks (comprising 9% of industry employment statewide), Janitors and Cleaners (8.3%), and Office Clerks (7.4%).

- Top occupations projected to grow significantly statewide from 2004-2014 include:

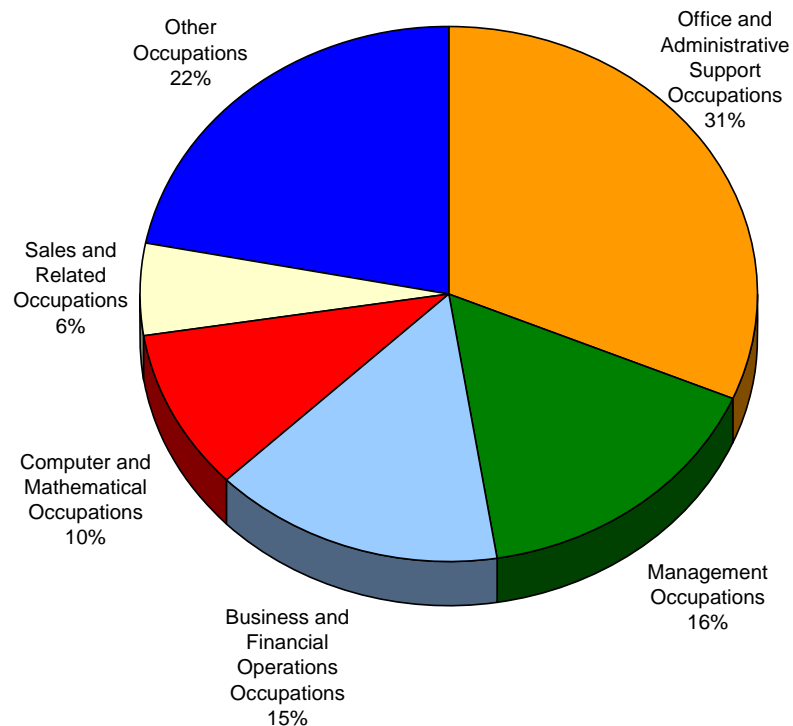
Jobs requiring less than an Associates degree
– Real Estate Sales Representatives (23% growth)
– Real Estate Brokers (17%)
– Maintenance and Repair Workers (17%)
– First-line Supervisors/Managers of Housekeeping and Janitorial Workers (17%)

Jobs requiring an Associates degree or higher
– Business Operations Specialists (28%)
– Property, Real Estate, and Community Association Managers (26%)



Occupations in the Management of Companies and Enterprises Industry, New Jersey Statewide Data, 2004

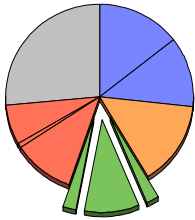
Distribution by
Occupational Groups



Top Occupations by Training Requirements

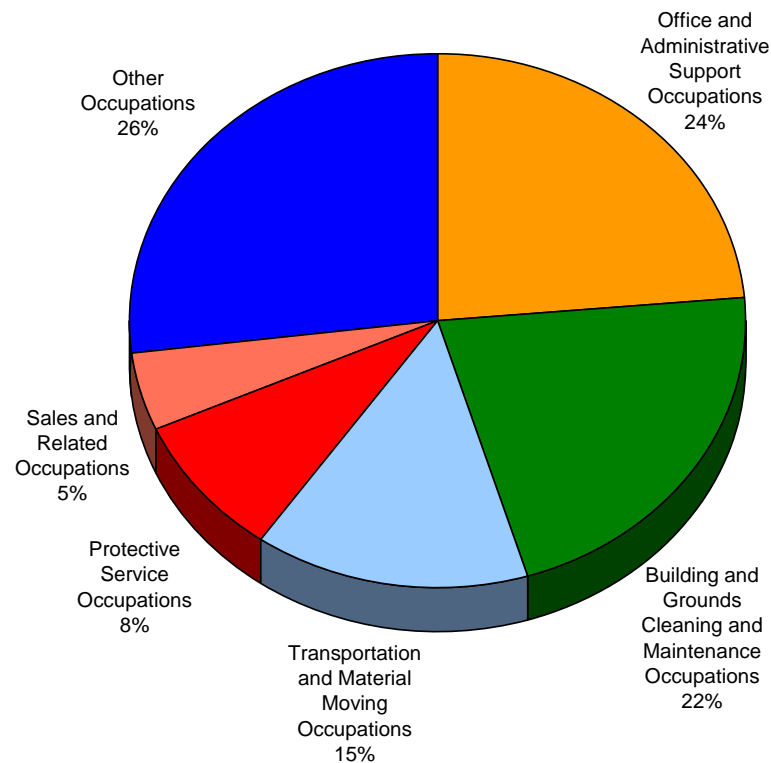
Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Customer Service Representatives	4.1%	16%	\$36,000
Bookkeeping, Accounting, and Auditing Clerks	3.9%	2%	\$36,350
Office Clerks, General	3.4%	1%	\$31,670
Executive Secretaries and Administrative Assistants	3.3%	2%	\$50,120
Sales Representatives, Wholesale and Manufacturing, except Technical and Scientific Products	1.7%	14%	\$68,770
Long-term on-the-job training / work experience / some postsecondary training			
First-Line Supervisors/Managers of Office and Administrative Support Workers	2.5%	3%	\$54,140
Managers, All Other	1.5%	14%	\$125,740
Wholesale and Retail Buyers, except Farm Products	1.0%	7%	N/A
Purchasing Agents, except Wholesale, Retail, and Farm Products	0.8%	14%	\$57,000
Claims Adjusters, Examiners, and Investigators	0.5%	14%	N/A
Associates degree or higher			
Accountants and Auditors	3.3%	14%	\$61,120
General and Operations Managers	3.1%	12%	N/A
Business Operations Specialists, All Other	2.7%	25%	63,150
Financial Managers	2.1%	14%	\$139,660
Computer Systems Analysts	1.8%	25%	\$83,730

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Occupations in the Administrative and Support Services and Waste Management Industry, New Jersey Statewide Data, 2004

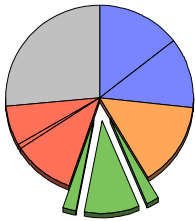
Distribution by
Occupational Groups



Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.

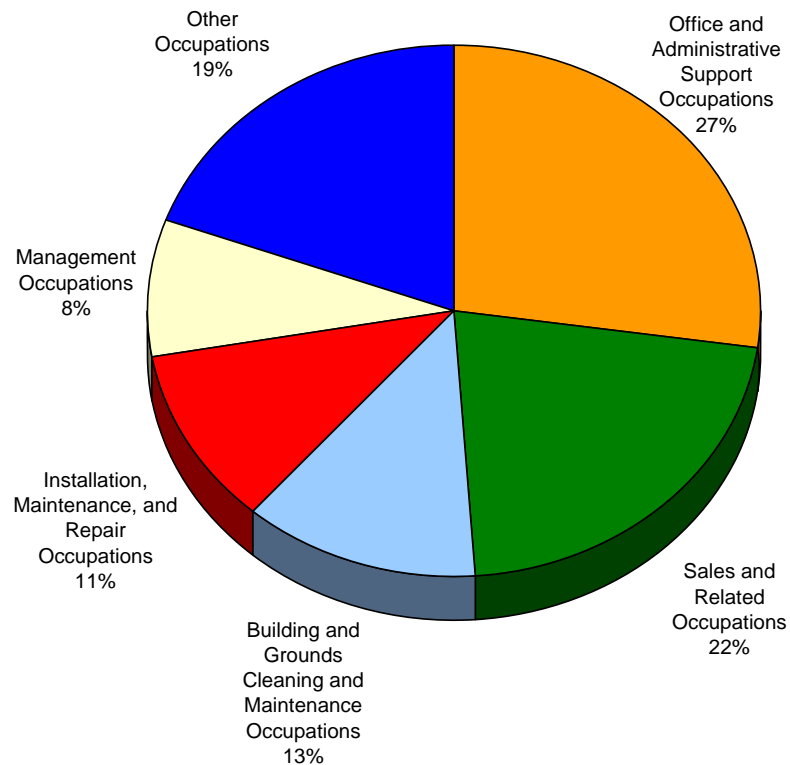
Top Occupations by Training Requirements

Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Janitors and Cleaners, except Maids and Housekeeping Cleaners	11.9%	18%	\$15,780
Security Guards	7.9%	12%	\$20,990
Laborers and Freight, Stock, and Material Movers, Hand	6.0%	29%	\$14,220
Landscaping and Groundskeeping Workers	5.7%	22%	\$21,950
Packers and Packagers, Hand	5.4%	19%	\$13,850
Long-term on-the-job training / work experience / some postsecondary training			
Travel Agents	1.4%	7%	\$33,140
First-Line Supervisors/Managers of Office and Administrative Support Workers	1.1%	20%	\$50,870
Licensed Practical and Licensed Vocational Nurses	1.0%	53%	\$50,060
First-Line Supervisors/Managers of Housekeeping and Janitorial Workers	0.9%	15%	\$31,680
First-Line Supervisors/Managers of Landscaping, Lawn Service, and Groundskeeping Workers	0.7%	9%	\$40,890
Associates degree or higher			
General and Operations Managers	1.3%	26%	\$138,180
Registered Nurses	1.3%	47%	\$74,570
Employment, Recruitment, and Placement Specialists	0.8%	42%	\$40,700
Business Operations Specialists, All Other	0.6%	59%	\$42,720
Accountants and Auditors	0.6%	37%	\$62,440



Occupations in the Real Estate Industry, New Jersey Statewide Data, 2004

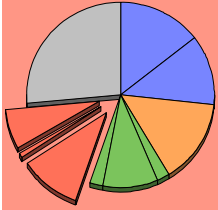
Distribution by
Occupational Groups



Top Occupations by Training Requirements

Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Counter and Rental Clerks	9.0%	9%	\$16,360
Janitors and Cleaners, except Maids and Housekeeping Cleaners	8.3%	16%	\$20,920
Office Clerks, General	7.4%	4%	\$20,550
Maintenance and Repair Workers, General	6.8%	17%	\$33,440
Secretaries, except Legal, Medical, and Executive	5.7%	-5%	\$26,950
Long-term on-the-job training / work experience / some postsecondary training			
Real Estate Sales Agents	6.1%	23%	\$43,050
Real Estate Brokers	2.2%	17%	N/A
First-Line Supervisors/Managers of Office and Administrative Support Workers	2.0%	4%	\$51,950
First-Line Supervisors/Managers of Housekeeping and Janitorial Workers	1.7%	17%	\$39,420
First-Line Supervisors/Managers of Retail Sales Workers	1.5%	-4%	\$40,910
Associates degree or higher			
Property, Real Estate, and Community Association Managers	4.0%	26%	\$50,280
General and Operations Managers	2.4%	13%	\$122,200
Financial Managers	0.7%	15%	\$100,700
Accountants and Auditors	0.7%	13%	\$51,120
Business Operations Specialists, All Other	0.4%	28%	\$47,550

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Key Industry Group 4: Hospitality and Retail

Retail Trade; Arts, Entertainment, and Recreation; Accommodation and Food Services

The Meadowlands has long been known for its entertainment, hospitality, and retail offerings. To expand the region's reputation as a premier entertainment and shopping destination, plans are underway to expand and improve public transportation routes, and to develop a large retail and sports entertainment center, a new stadium at the Meadowlands Sports Complex, and a golf course, among other attractions. Experts interviewed for this report expect these developments to increase the number of jobs in related industries.

Retail Trade

From food, beverage, and clothing stores to other types of businesses, Retail establishments in the Meadowlands comprise the fourth largest industry in the region. Currently, the large majority of retail firms in the Meadowlands are small businesses, with 62% employing fewer than five workers. By contrast, planned developments are designed to attract large national retail operations to the area.

Arts, Entertainment, and Recreation

From football games to concerts to horse racing, the Meadowlands Sports Complex has long been home to a variety of entertainment options. With new facilities planned for the complex and the planned development of other recreational options, including the expansion of ecotourism, jobs in this industry are likely to increase in coming years.

Accommodation and Food Services

Restaurants and hotels in the Meadowlands support the needs of tourists, residents, and local workers. According to regional experts, the region's accommodations sector is also popular among business travelers visiting New York and other local cities. Several planned developments in the region include expanding the availability of hotels and restaurants.

Key Facts

For Meadowlands Region:

Total Employment ¹	16,547
Establishments ¹	1,129
% fewer than 10 workers ²	79%
% fewer than 50 workers ²	95%

Average Quarterly Wages ¹	\$8,952
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For Bergen and Hudson Counties:

Quarterly Turnover ³	12.6%
New Hires per quarter ³	17,006
Net Jobs Added per quarter ³	517

Key Facts

For Meadowlands Region:

Total Employment ¹	1,255
Establishments ¹	88
% fewer than 10 workers ²	77%
% fewer than 50 workers ²	93%

Average Quarterly Wages ¹	\$80,449
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For Bergen and Hudson Counties:

Quarterly Turnover ³	15.6%
New Hires per quarter ³	1,676
Net Jobs Added per quarter ³	156

Key Facts

For Meadowlands Region:

Total Employment ¹	10,657
Establishments ¹	608
% fewer than 10 workers ²	68%
% fewer than 50 workers ²	95%

Average Quarterly Wages ¹	\$4,286
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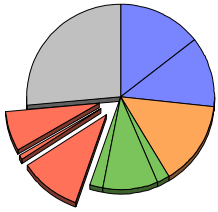
For Bergen and Hudson Counties:

Quarterly Turnover ³	15.7%
New Hires per quarter ³	11,190
Net Jobs Added per quarter ³	1,635

1. New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, Fourth Quarter 2005.

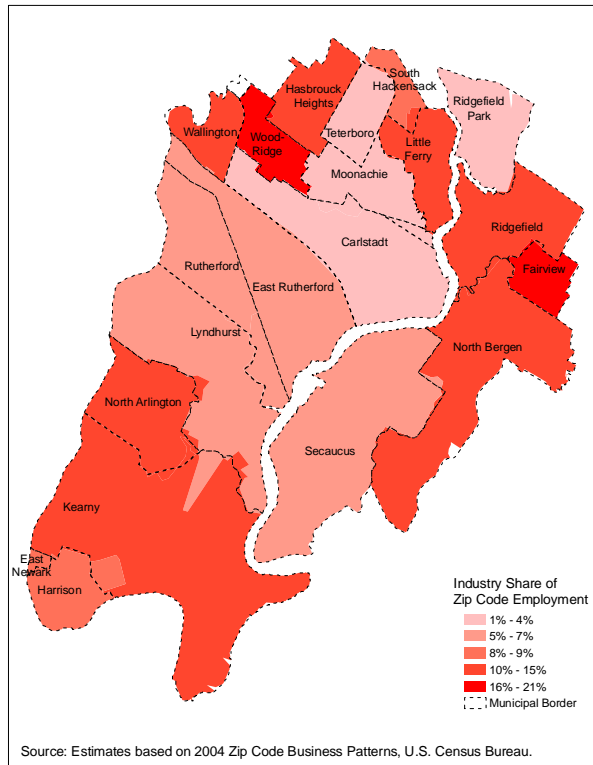
2. U.S. Census Bureau, Zip Code Business Patterns, 2004.

3. U.S. Census Bureau, Local Employment Dynamics – Quarterly Workforce Indicators, Fourth Quarter 2004-Third Quarter 2005.

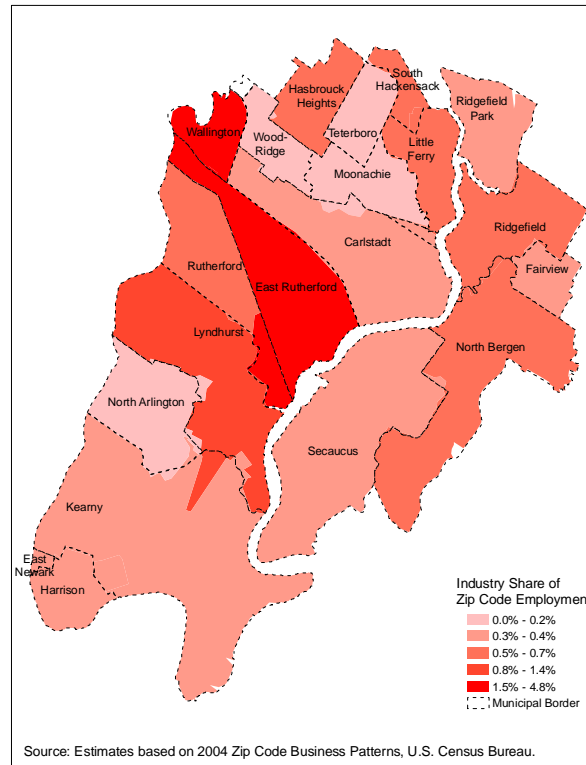


Hospitality and Retail: Local Concentration of Employment in the Meadowlands Region

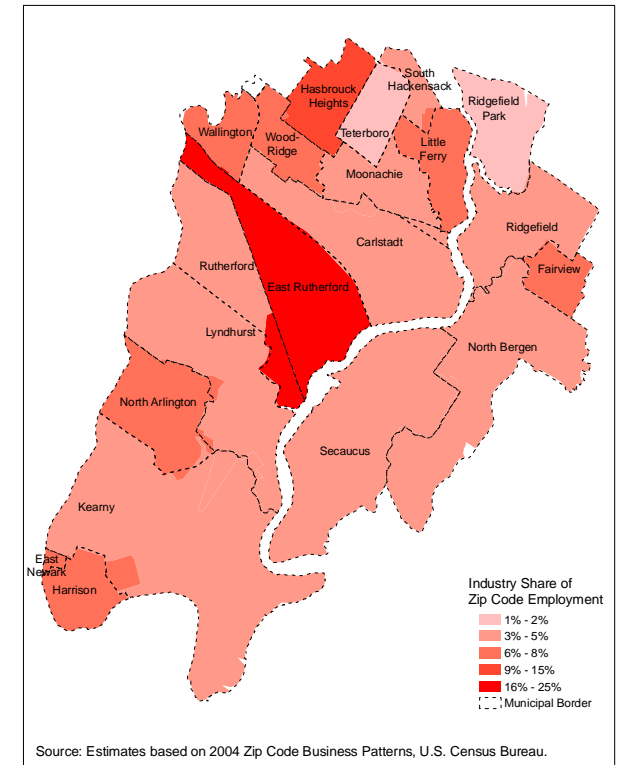
Retail Trade



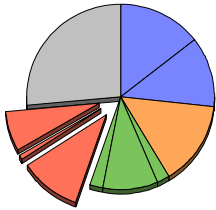
Arts, Entertainment, and Recreation



Accommodation and Food Services

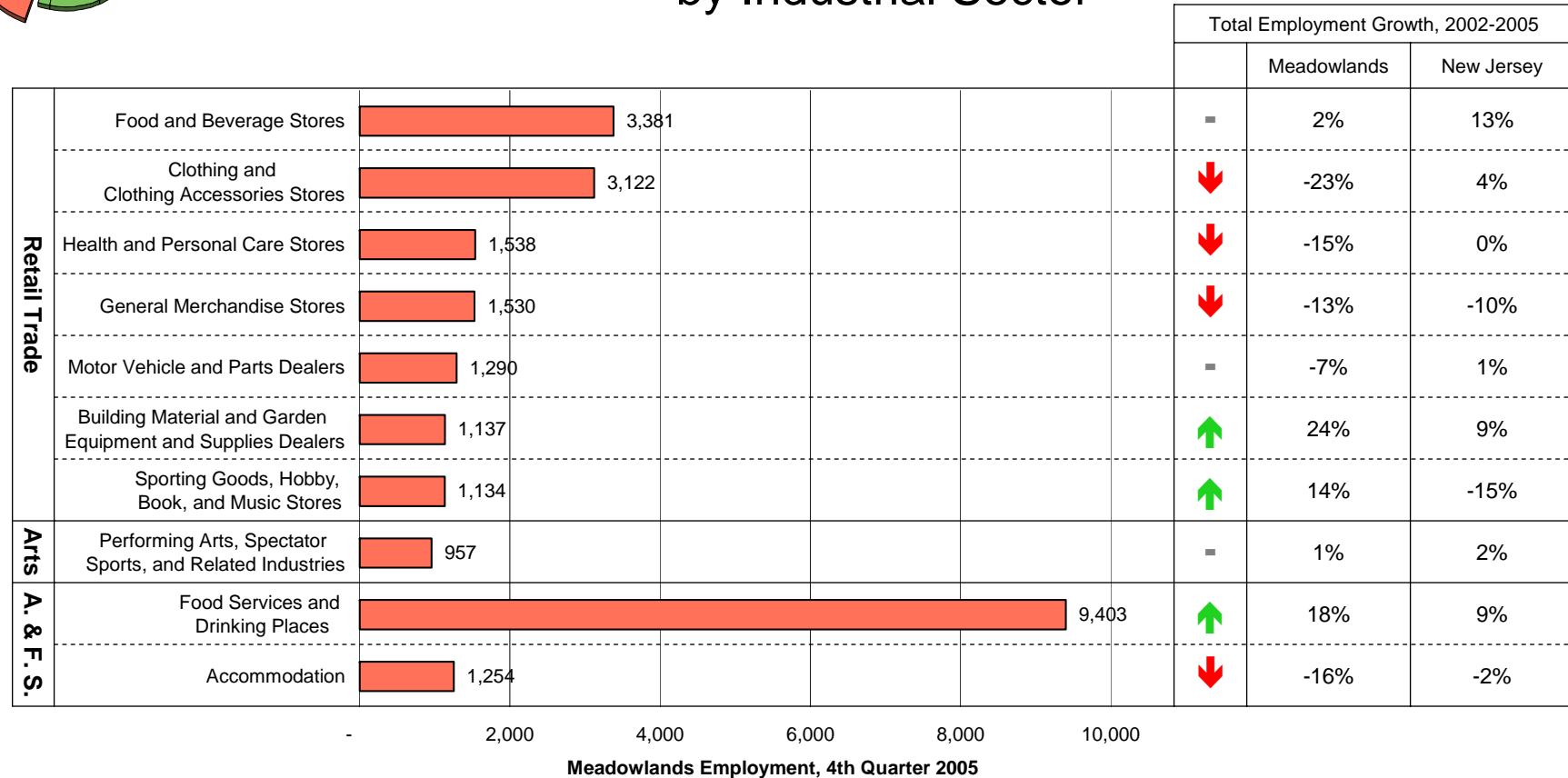


- **Retail Trade** shows the highest concentration around the periphery of the Meadowlands region.
- **Arts, Entertainment, and Recreation** and **Accommodation and Food Services** are concentrated around the East Rutherford area and the northern portion of the region.



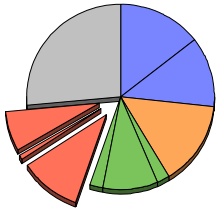
Hospitality and Retail:

Employment and Growth in the Meadowlands Region, by Industrial Sector



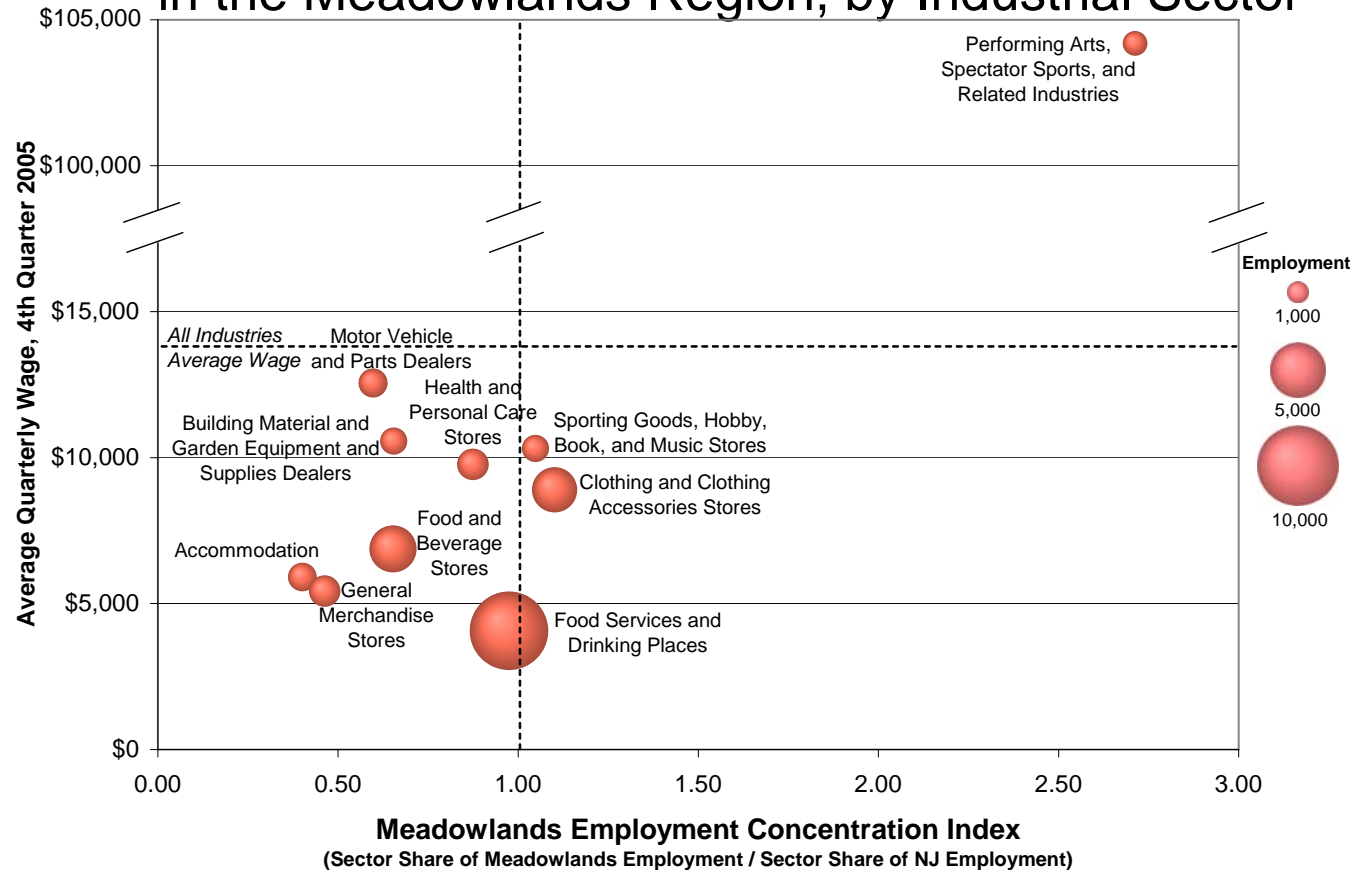
Food Services and Drinking Places sector offers the largest number of jobs in this industry grouping. This sector also comprises 85% of employment in the Accommodation and Food Services industry. Jobs in the sector grew by 18% between 2002 and 2005, double the rate of statewide growth. During the same period, employment in the **Accommodation** sector shrank by 16% in the Meadowlands, exceeding the 2% drop in sector employment statewide.

Food and Beverage Stores and **Clothing and Accessory Stores** provide 39% of jobs in the Meadowlands region's Retail Trade industry. However, employment in **Clothing and Accessory Stores** shrank sharply (-23%) in recent years, while jobs in this sector grew slightly statewide (4%). Similarly, employment in **Food and Beverage Stores** remained relatively stable in the region, while growing by 13% elsewhere in the state. While employment is small in these sectors, significant growth, especially compared to the state, occurred in **Building Material and Garden Equipment and Supplies Dealers** (24% vs. 9% NJ) and **Sporting Goods, Hobby, Book, and Music Stores** (14% vs. -15% NJ)



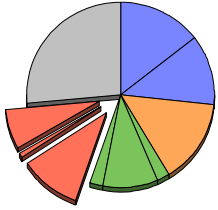
Hospitality and Retail:

Wages and Employment Concentration in the Meadowlands Region, by Industrial Sector



The **Performing Arts, Spectator Sports, and Related Industries** sector is very highly concentrated in the Meadowlands compared to other sectors in this industry grouping. Average wages in this industry are particularly high, most likely due to the high salaries of sports and other high wage entertainment occupations in this sector.

Sporting Goods, Hobby, Book, and Music Stores and **Clothing and Accessory Stores** are also somewhat concentrated in the Meadowlands, though these, along with all other sectors in this industry grouping with the exception of the Performing Arts, Spectator Sports, and Related Industries sector, offer average wages that fall below the average wage for all industries in the Meadowlands region. **Food and Drinking Places**, the largest sector in this industry grouping, offers the lowest average wages.



Hospitality and Retail: Key Trends and Planned Developments That May Affect Future Industry Growth

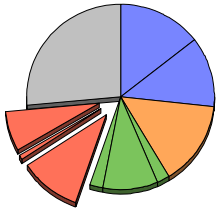
According to regional experts interviewed for this report, a number of Retail and Hospitality-related developments are planned for the Meadowlands area. These developments, many of which are quite large, promise to bring large numbers of new employers and jobs to the area. Key projects noted by interviewees include (See acknowledgements for a list of individuals interviewed):

Xanadu – This large project involves the development of a premier sports, leisure, and shopping complex that is expected to add 2.2 million square feet of entertainment and retail space near the Meadowlands Sports Complex. The project is also expected to attract new hotels and related hospitality and food services to the Meadowlands in the future. According to the developer, six anchor retailers have signed on to the project to date.

En-Cap project – This landfill redevelopment project is in its very early stages and will continue to develop over the next decade. The developer plans to create 2,500 housing units, including an adult community, as well as 2 golf courses, a 350-room resort hotel, and retail and recreational facilities.

New Stadium – Plans are underway to construct a new football stadium at the Meadowlands Sports Complex.

Secaucus Junction – Two components of the Secaucus Junction complex will add home and office space to the area. The Allied Junction component will add vertical office and residential space above the new rail transfer station. The Transit Village component will add approximately 2,200 residential units to the area surrounding the transfer station, as well as allow for the future development of commercial space, which could include retail or other hospitality related industries.



Hospitality and Retail: Workforce Opportunities, New Jersey Statewide Data

Retail Trade

- More than half (54%) of New Jersey jobs in the Retail industry are concentrated in Sales and Related Occupations (31%). An additional 18% of workers fill Office and Administrative Support jobs.
- The largest occupations in the industry have low training requirements, including Retail Salespersons (comprising 25.6% of industry employment statewide) and Cashiers (18.5%).

- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree

- Automotive Service Technicians and Mechanics (16% growth)
- Butchers and Meat Cutters (16%)

Jobs requiring an Associates degree or higher

- Pharmacists (32%)
- Sales Managers (21%)
- Accountants and Auditors (20%)

Arts, Entertainment, and Recreation

- Statewide, 29% of jobs in this industry are concentrated in Personal Care and Service Occupations, while an additional 27% are found in Other Occupations and 16% work in Food Preparation and Serving Occupations.
- The industry's largest occupations have low to moderate training requirements, including Amusement and Recreation Attendants (comprising 11% of industry employment statewide), Fitness Trainers and Aerobics Instructors (9.3%), and Landscaping and Groundskeeping Workers (6.1%).

- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree

- Musicians and Singers (40% growth)
- Coaches and Scouts (31%)

Jobs requiring an Associates degree or higher

- Agents and Business Managers of Artists, Performers, and Athletes (49%)
- Business Operations Specialists (43%)

Accommodation and Food Services

- Jobs in New Jersey's Accommodation and Food Services industry are overwhelmingly concentrated in Food Preparation and Serving Related Occupations (71%).
- The largest occupations in the industry have low training requirements, including Combined Food Preparation and Serving Workers (comprising 18.4% of industry employment statewide) and Waiters and Waitresses (17.2%).

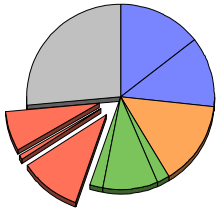
- Top occupations projected to grow significantly statewide from 2004-2014 include:

Jobs requiring less than an Associates degree

- Food Service Managers (21% growth)
- First-Line Supervisors/Managers of Food Preparation and Serving Workers (20%)

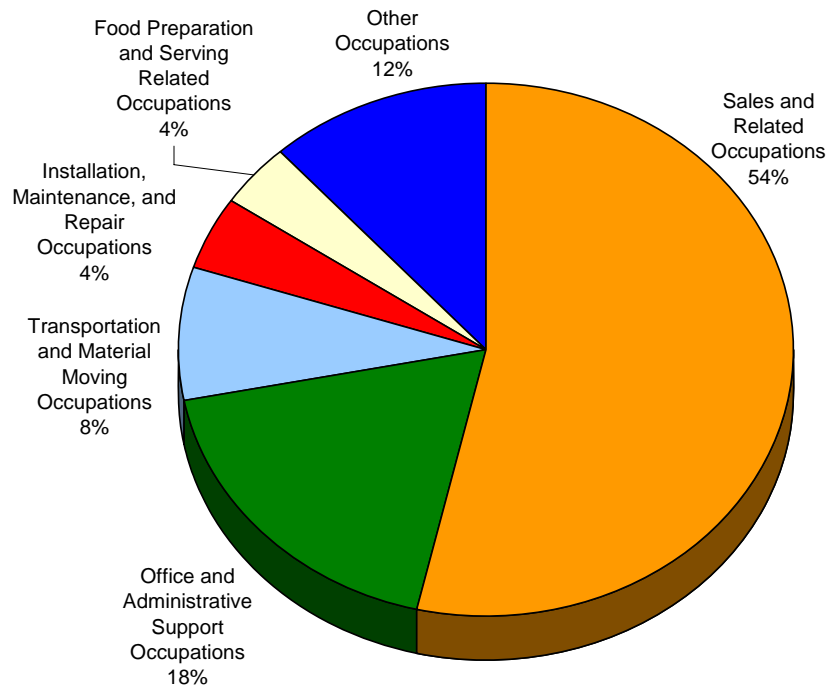
Jobs requiring an Associates degree or higher

- General and Operations Managers (18%)
- Business Operations Specialists (18%)



Occupations in the Retail Trade Industry, New Jersey Statewide Data, 2004

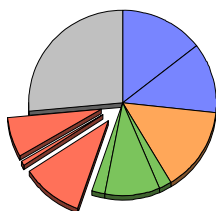
Distribution by
Occupational Groups



Top Occupations by Training Requirements

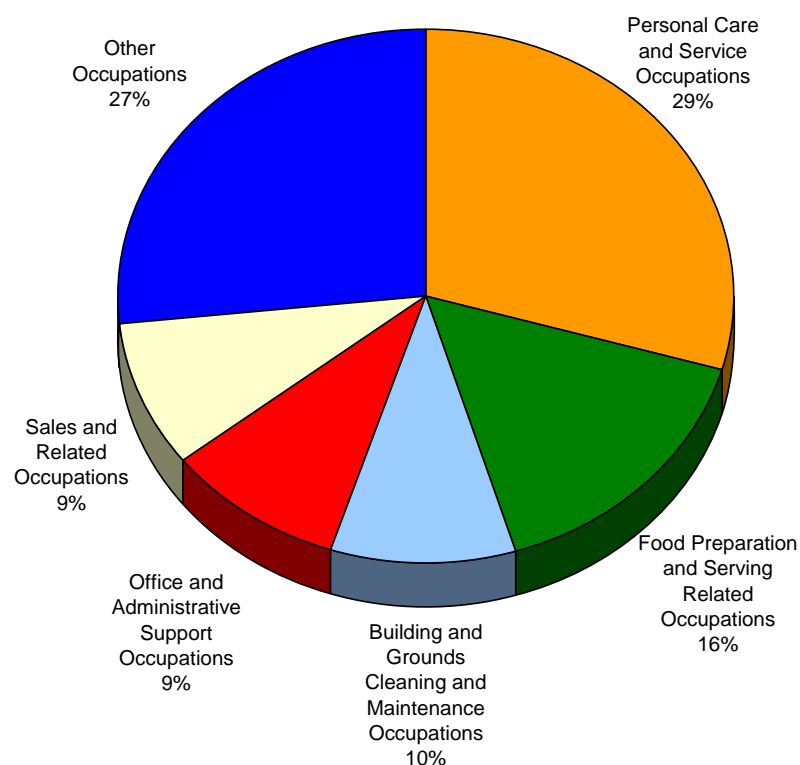
Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Retail Salespersons	25.6%	12%	\$20,730
Cashiers	18.4%	5%	\$16,190
Stock Clerks and Order Fillers	8.5%	-6%	\$18,300
Service Station Attendants	1.8%	-11%	\$15,670
Laborers and Freight, Stock, and Material Movers, Hand	1.7%	7%	\$18,850
Long-term on-the-job training / work experience / some postsecondary training			
First-Line Supervisors/Managers of Retail Sales Workers	6.2%	8%	\$39,850
Automotive Service Technicians and Mechanics	2.2%	16%	\$40,420
First-Line Supervisors/Managers of Office and Administrative Support Workers	1.1%	8%	\$41,860
Butchers and Meat Cutters	0.7%	16%	\$38,670
Wholesale and Retail Buyers, except Farm Products	0.5%	12%	\$48,830
Associates degree or higher			
General and Operations Managers	1.3%	17%	\$102,480
Pharmacists	1.0%	32%	\$84,090
Sales Managers	0.5%	21%	\$65,220
Opticians, Dispensing	0.2%	16%	\$43,130
Accountants and Auditors	0.2%	20%	\$62,230

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Occupations in the Arts, Entertainment, and Recreation Industry, New Jersey Statewide Data, 2004

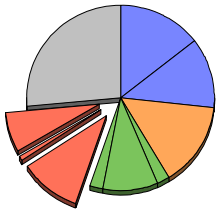
Distribution by
Occupational Groups



Top Occupations by Training Requirements

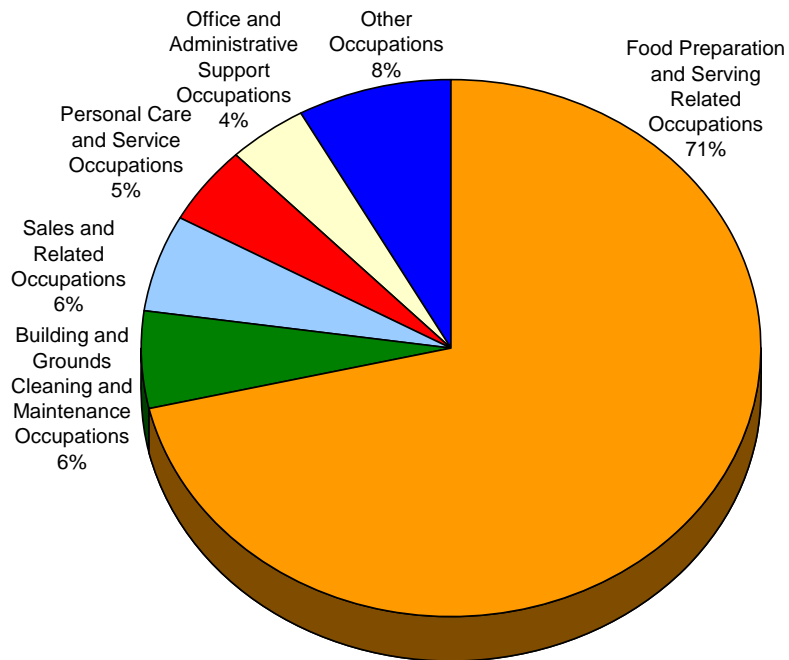
Occupation	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short- to moderate-term on-the-job training			
Amusement and Recreation Attendants	11.0%	27%	\$16,500
Landscaping and Groundskeeping Workers	6.1%	26%	\$22,210
Waiters and Waitresses	4.9%	14%	\$16,910
Counter and Rental Clerks	3.7%	37%	\$20,790
Protective Service Workers, All Other	2.8%	31%	N/A
Long-term on-the-job training / work experience / some postsecondary training			
Fitness Trainers and Aerobics Instructors	9.3%	30%	\$45,940
First-Line Supervisors/Managers of Personal Service Workers	2.0%	30%	\$39,940
Musicians and Singers	1.5%	40%	N/A
Cooks, Restaurant	1.2%	22%	\$29,300
Coaches and Scouts	1.1%	31%	\$41,010
Associates degree or higher			
General and Operations Managers	1.7%	28%	\$108,230
Public Relations Specialists	0.6%	26%	\$39,620
Business Operations Specialists, All Other	0.4%	43%	\$37,770
Athletic Trainers	0.4%	29%	N/A
Agents and Business Managers of Artists, Performers, and Athletes	0.4%	49%	\$67,880

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.



Occupations in the Accommodation and Food Services Industry, New Jersey Statewide Data, 2004

Distribution by
Occupational Groups



Top Occupations by Training Requirements

Occupation Name	Share of Industry in NJ	Projected NJ Growth, 2004-2014	Bergen-Hudson-Passaic Median Wages
Short to moderate-term on-the-job training			
Combined Food Preparation and Serving Workers, including Fast Food	18.4%	19%	\$14,700
Waiters and Waitresses	17.2%	19%	\$14,980
Cooks, Fast Food	4.6%	16%	\$16,830
Bartenders	4.4%	11%	\$18,970
Maids and Housekeeping Cleaners	3.6%	7%	\$18,570
Long-term on-the-job training / work experience / some postsecondary training			
Cooks, Restaurant	4.6%	18%	\$23,910
First-Line Supervisors/Managers of Food Preparation and Serving Workers	4.3%	20%	\$33,430
Gaming Dealers	2.8%	-1%	N/A
Food Service Managers	1.2%	21%	\$55,010
Gaming Supervisors	1.0%	-1%	N/A
Associates degree or higher			
General and Operations Managers	0.5%	18%	\$105,190
Sales Managers	0.1%	17%	N/A
Accountants and Auditors	0.1%	11%	\$44,700
Financial Managers	0.1%	11%	\$68,990
Business Operations Specialists, All Other	0.0%	18%	N/A

Source: New Jersey Department of Labor and Workforce Development,
Occupational Employment Projections, 2004-2014
Occupational Employment Statistics Wage Survey, May 2006.

Data Sources and Methods

The Heldrich Center analyzed the following types of labor market information from these sources for Section 1:

- **Quarterly Census of Employment and Wages, New Jersey Department of Labor and Workforce Development: Data for Meadowlands Region by Industry**
 - 2005 Fourth Quarter Employment and Wages
 - Employment Growth, Fourth Quarter 2002 to Fourth Quarter 2005
 - Meadowlands Industrial Concentration Index:
 - Over/under concentration of industry employment relative to New Jersey statewide totals
- **Zip Code Business Patterns 2004, U.S. Census Bureau**
 - Estimated Employment by Industry in Meadowlands Zip Codes
 - Number of Establishments in Meadowlands Zip Codes
- **Local Employment Dynamics (Average for Fourth Quarter 2004 to Third Quarter 2005)**
 - Turnover (Bergen and Hudson Average)
 - New Hires (Bergen and Hudson Total)
 - Net Job Growth (Bergen and Hudson Total)
- **Occupational Employment Projections, New Jersey Department of Labor and Workforce Development**
 - Occupational Distribution by Industry for New Jersey, 2004
 - Projected Occupational Growth Through 2014 in New Jersey
- **Occupational Employment Statistics Wage Survey, New Jersey Department of Labor and Workforce Development, May 2006**
 - Median Wage by Occupation for Hudson-Bergen-Passaic Region

Note: All industry, sector, and occupational categories included in this section are derived from standard industry and occupational classification systems used by the United States Department of Labor and the New Jersey Department of Labor and Workforce Development to understand and analyze labor market information. For industries and industry sectors, the North American Industry Classification System (NAICS) was used. This system categorizes industries based on the primary activity of the business establishment. The Standard Occupational Classification (SOC) system, which includes 23 major occupational categories and 820 standard occupations was used to describe occupational information. For more information on the SOC system, go to: <http://www.bls.gov/soc/>. For more information on the NAICS System, please see <http://www.census.gov/epcd/www/naics.html>.

SECTION 2:

A PROFILE OF THE WORKFORCE
SUPPLY AND EDUCATIONAL
RESOURCES FOR THE
MEADOWLANDS REGION

Introduction and Notes

The data provided in this section of the report are meant to provide reference information for policymakers and employers developing workforce and economic development strategies for the Meadowlands region.

Part 1 of this section provides information about the origin of the Meadowlands workforce, describes the primary commutershed areas for the region, and identifies general characteristics about the adult population in these commutersheds that may be helpful reference material when planning specific workforce and economic development strategies. Maps in this section also include major highways in Northern New Jersey and local bus routes in the Meadowlands to provide a reference point for understanding major commuting options for current and potential workers in the region. Once again, it was beyond the scope of this report to determine whether the existing public transportation options in the region are adequate.

Part 2 of this section identifies and maps the major postsecondary institutions in the Meadowlands region and provides a directory of the types of secondary and postsecondary programs that are offered in the industry groupings identified in Section 1 of the report. A comprehensive listing of industry-related postsecondary programs and the educational providers that offer them has been provided to the Meadowlands Regional Chamber as a separate document for reference and planning purposes.

NOTE: It is not possible with currently available data to characterize the adequacy of the workforce supply for particular industries or occupations. It is beyond the scope of this report to make such an assessment or to identify occupational areas where workforce or skill shortages are occurring. Further research with employers in targeted industries and sectors in the Meadowlands region is needed to determine the particular difficulties these employers face in filling jobs or upgrading the skills of current workers.

SECTION 2: A PROFILE OF THE WORKFORCE SUPPLY AND EDUCATIONAL RESOURCES FOR THE MEADOWLANDS REGION

PART 1:

CHARACTERISTICS OF THE WORKFORCE SUPPLY FOR THE MEADOWLANDS REGION

Origin of the Meadowlands Workforce

Which areas provide the largest numbers of workers to the Meadowlands?

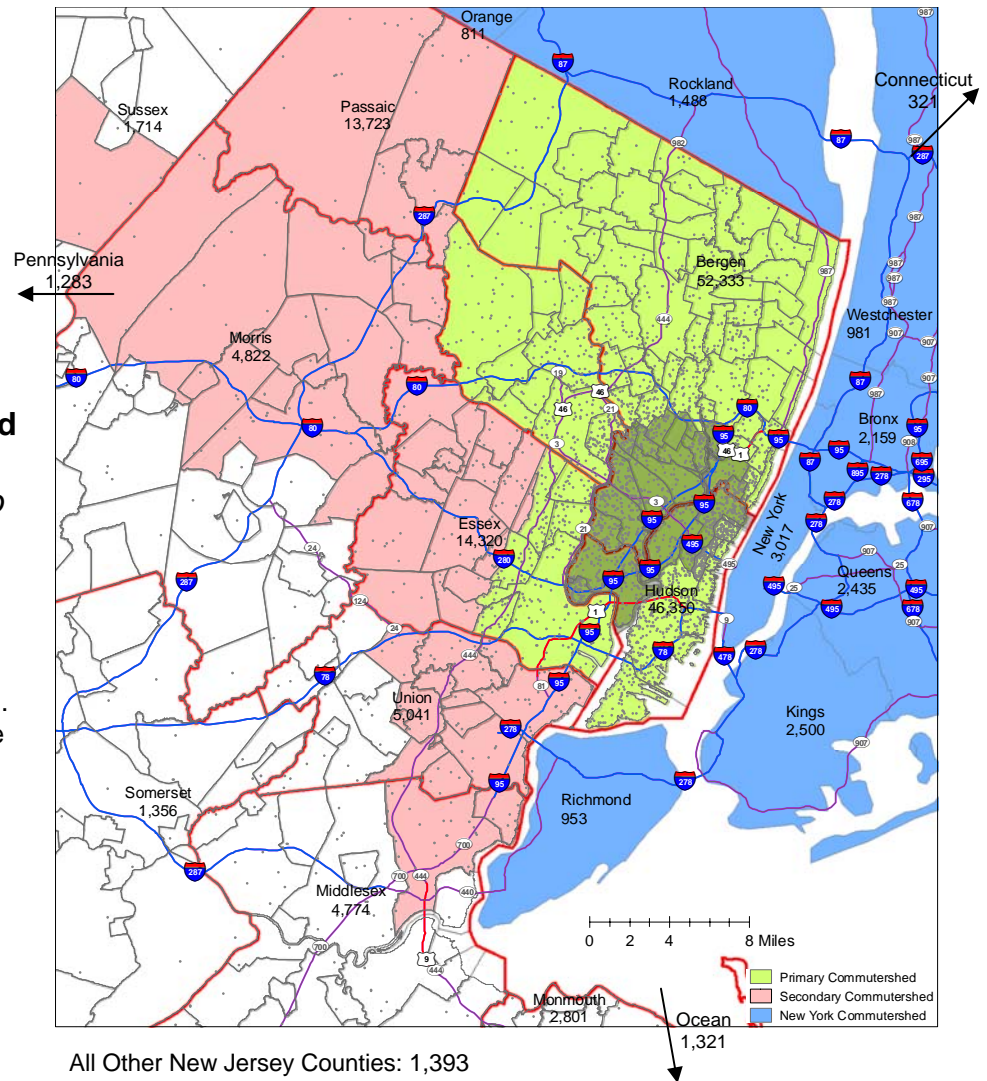
The Helderich Center identified one primary and two secondary commutershed areas that provide significant numbers of workers to the Meadowlands. The map to the right indicates the total number of Meadowlands workers who live in each county, while each grey dot represents 40 people who commute to work in the Meadowlands. The three commutershed areas are:

➤ **Bergen and Hudson Counties and parts of Essex and Passaic Counties** provide most of the Meadowlands regional workforce (72%, or 121,133). *(Green area on map to the right)*

- 64% of all Meadowlands workers live in **Bergen** and **Hudson** counties (52,333 and 46,350, respectively).
- A large share of the residents in the municipalities in and immediately surrounding the Meadowlands work within the region. Moonachie has the highest percentage of residents working in the Meadowlands (43%).

➤ **Municipalities in Essex, Passaic, Union, Morris, and Sussex Counties** provide 9% (14,245) of workers in the Meadowlands. *(Pink area on map to the right)*

➤ An additional **9%** (14,344) of Meadowlands workers commute from eight **southern New York** counties: New York (Manhattan), Richmond (Staten Island), Kings (Brooklyn), Queens, Bronx, Westchester, Rockland, and Orange. *(Blue area on map to the right)*

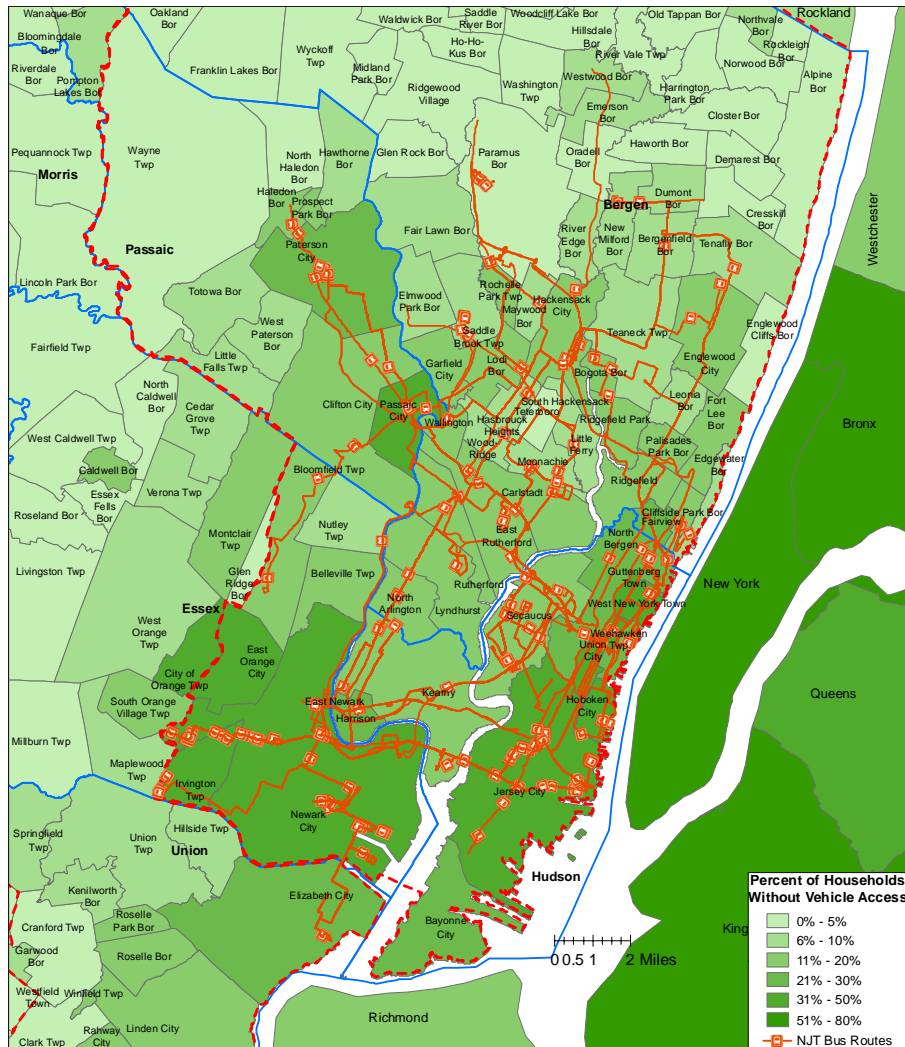


All Other New Jersey Counties: 1,393

Source: U.S. Census Bureau, Journey to Work 2000.

Vehicle Access and Available Bus Routes in the Meadowlands

Percent of Households that Do Not Have Access to a Vehicle, 2000 and Local Bus Routes



Key Facts about Vehicle Access in the Meadowlands Commutershed Regions

- Nearly one-quarter (22% or 197,905) of households in the primary commutershed area for the Meadowlands do not have access to a vehicle, increasing their reliance on public transportation to get to work.
- As the map to the left indicates, local bus routes are available in most areas with low vehicle ownership rates. However, further study is needed to determine whether these services are adequate.
- In addition, almost half (49% or 1.7 million) of households in the New York commuter region for the Meadowlands do not have access to a vehicle.
- Reliance on public transportation is less of an issue in the more suburban New Jersey municipalities that make up the region's secondary commutershed, where fewer than 10% (37,120) of households lack access to a vehicle.

Source: U.S. Census Bureau, 2000 Census, SF3.
Bus Routes from New Jersey Transit.

Key Transportation Investments That May Affect Commuting Patterns and Future Economic Growth in the Meadowlands Region

According to regional experts interviewed for this report, a number of significant transportation investments could affect future industry growth in the Meadowlands by increasing access to the region. Key investments noted by interviewees include (See acknowledgements for a list of individuals interviewed):

Current Investments

Improving Access to the Secaucus Transfer Station – The Secaucus Transfer station has increased access to the Meadowlands for passengers of New Jersey Transit’s passenger rail system. The Transfer station provides an important connection between the Meadowlands and New York City. Planned road improvements around the Secaucus Transfer station and improvements to distributor bus service should help commuters get from the station to their place of work.

Improvements to Route 3 – Route 3 is a primary east-west connector through the Meadowlands. The road is being expanded from 6 to 10 lanes west of the Meadowlands Sports Complex to improve the flow of traffic in the western portion of the Meadowlands.

Possible Future Investments

Enhancements to NJ Transit’s Passenger Rail System – A number of planned and proposed enhancements to the passenger rail system could, if completed, further expand access to the Meadowlands. These include:

- Enhancements to the Pascack Valley Line to improve access to the Meadowlands and New York City for residents of central Bergen County and Rockland County, New York.
- Addition of a Northern Branch Rail Line to connect eastern Bergen County to the Meadowlands.
- Extension of the Hudson-Bergen Light Rail Line to connect with the possible addition of a Northern Branch rail line.

Building of a Direct Rail connection to the Sports Complex – The construction of a direct rail connection from Hoboken, scheduled to be completed in 2008, will improve access to the Sports Complex for New Jersey residents. A shuttle will also connect riders to the Secaucus rail transfer station. Further improvements linking this rail line to New York City, scheduled to be completed in 2016, could improve access to the Sports Complex for visitors from throughout the tri-state region.

Occupation and Industry Specialization of Individuals Who Live In Meadowlands Commutershed Areas

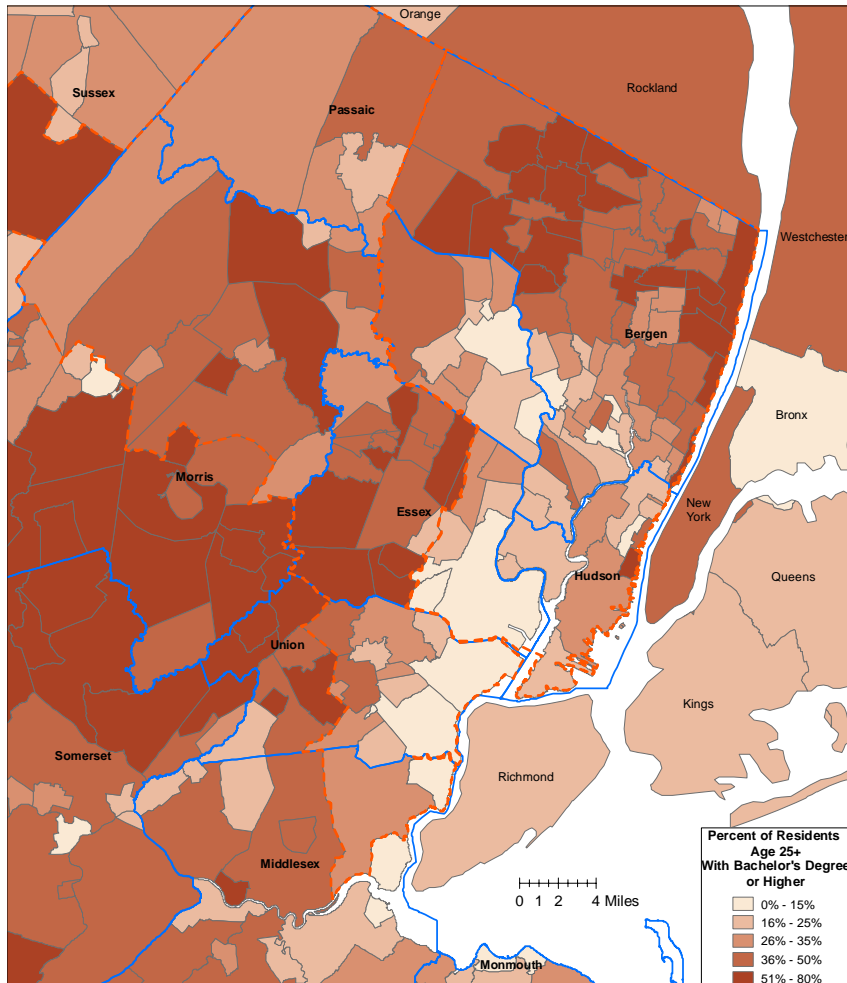
These tables indicate the number of workers who live in each commutershed area that reported working in various industry and occupational categories on the 2000 U.S. Decennial Census. While there are no data available that will accurately assess the current workforce supply for a given industry or job, these figures suggest where large concentrations of workers who have self-reported experience in key job categories and industries may be found. This information may be useful reference material for employers and workforce development professionals who are developing recruitment and training strategies.

Occupation	Number of Workers			Industry	Number of Workers		
	Primary Commutershed	Secondary Commutershed	New York Commutershed		Primary Commutershed	Secondary Commutershed	New York Commutershed
Sales and office occupations	321,779	149,125	1,086,658	Manufacturing	138,648	69,404	273,116
Professional and related occupations	218,745	121,590	949,875	Health Care and Social Assistance	123,970	55,211	585,830
Management, business, and financial operations occupations	157,934	86,174	563,610	Retail Trade	121,490	55,072	369,826
Service occupations	154,199	59,794	715,609	Educational Services	84,256	43,200	363,642
Production occupations	83,163	31,053	205,653	Professional, Scientific, and Technical Services	80,777	47,714	331,711
Construction, extraction, and maintenance occupations	76,471	37,736	265,873	Finance and Insurance	80,530	39,964	329,751
Transportation and material moving occupations	73,429	29,294	207,675	Transportation and Warehousing	71,500	29,445	224,646
Farming, fishing, and forestry occupations	796	314	2,478	Wholesale Trade	57,107	24,756	128,025
Total	1,086,516	515,080	3,997,431	Other Services (except Public Administration)	53,328	22,528	222,568
				Construction	52,486	25,991	182,637
				Accommodation and Food Services	50,991	20,593	221,174
				Information	48,021	23,789	207,862
				Administrative and Support and Waste Management Services	40,212	16,372	143,499
				Public Administration	37,995	18,954	182,266
				Real Estate and Rental and Leasing	20,718	10,382	112,406
				Arts, Entertainment, and Recreation	16,490	6,770	93,025
				Utilities	6,070	3,771	19,207
				Agriculture, Forestry, Fishing, and Hunting; Mining	1,150	628	4,728
				Management of Companies and Enterprises	777	536	1,512
				Total	1,086,516	515,080	3,997,431

Source: U.S. Census Bureau, 2000 Census, SF3.

Educational Attainment of Adult Residents in Meadowlands Commutershed Areas

Percent of Residents 25 and Older
With a Bachelor's Degree or Higher, 2000



Source: U.S. Census Bureau, 2000 Census, SF3.

Key Facts About Educational Attainment

In the Primary Commutershed region:

- Seventy-six percent of adults 25 and older (1,237,795 individuals) have earned at least a high school diploma or equivalent.
- Thirty-two percent (513,311) of these residents have attained an Associates Degree or higher.
- Twenty-seven percent (444,182), have earned at least a Bachelor's degree and 10% (158,244) have earned a graduate or professional degree.

In the Secondary New Jersey Commutershed region:

- Eighty-four percent of adults 25 and older (607,879 individuals) have earned at least a high school diploma or equivalent.
- Thirty-nine percent (277,979) of these residents have attained an Associates Degree or higher.
- Thirty-four percent (241,939 individuals), have earned at least a Bachelor's degree and 13% (91,684) have earned a graduate or professional degree.

In the New York Commutershed region:

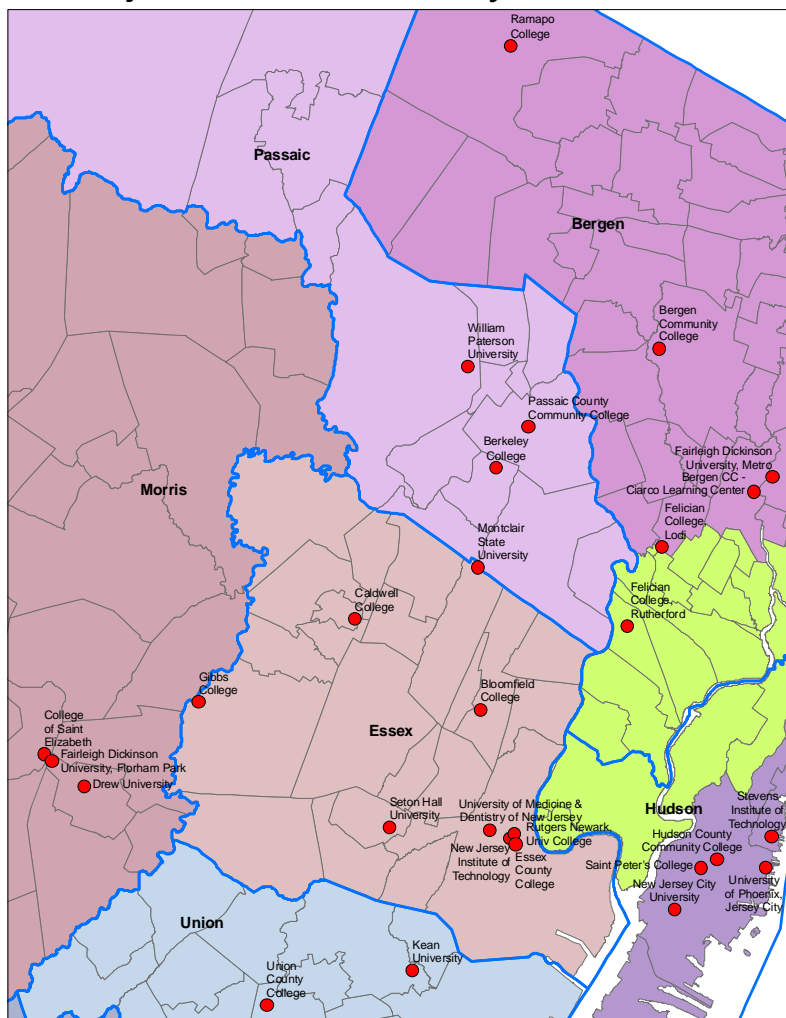
- Seventy-four percent of adults 25 and older (4,670,924 individuals) have earned at least a high school diploma or equivalent.
- Thirty-four percent (2,162,977) of these residents have attained an Associates Degree or higher.
- Twenty-nine percent (1,820,710), have earned at least a Bachelor's degree and 12% (786,397) have earned a graduate or professional degree.

SECTION 2: A PROFILE OF THE WORKFORCE SUPPLY AND EDUCATIONAL RESOURCES FOR THE MEADOWLANDS REGION

PART 2: EDUCATIONAL RESOURCES LOCATED NEAR THE MEADOWLANDS REGION

General Higher Educational Resources: Colleges and Universities Close to the Meadowlands Region

Major Postsecondary Institutions



According to data available through the Commission on Higher Education, while there are few colleges and universities located in the Meadowlands, workers in the Meadowlands region have access to at least 25 major postsecondary institutions to obtain needed training for jobs. These schools may also act as resources for providing customized training services for businesses in the Meadowlands. Area schools include:

Bergen County

Bergen Community College and Ciarco Learning Center
Fairleigh Dickinson University
Felician College
Ramapo College

Hudson County

Hudson County Community College
New Jersey City University
Saint Peter's College
Stevens Institute of Technology
University of Phoenix

Other Area Colleges

Berkeley College
Bloomfield College
Caldwell College
College of Saint Elizabeth
Drew University
Essex County College
Gibbs College
Kean University
Montclair State University
New Jersey Institute of Technology
Passaic County Community College
Rutgers University-Newark, University College
Seton Hall University
University of Medicine and Dentistry of New Jersey
Union County College
William Paterson University

Supply Chain Industries:

Postsecondary Training Programs In the Greater Meadowlands Region

Instructional Program	Number of Providers	Number of Programs
47.0409 Parts and Warehousing Operations	1	1
47.0603 Autobody/Collision and Repair Technology/Technician	1	1
47.0604 Automobile/Automotive Mechanics Technology/Technician	5	7
47.0605 Diesel Mechanics Technology/Technician	1	1
47.0607 Airframe Mechanics and Aircraft Maintenance Technology	1	2
47.0608 Aircraft Powerplant Technology/Technician	1	1
49.0205 Truck and Bus Driver/Commercial Vehicle Operation	20	83
49.0299 Ground Transportation, Other	2	2
49.0905 Transportation and Materials Moving	1	1
49.9999 Transportation and Materials Moving, Other	1	1

Source: SURE System, New Jersey Commission on Higher Education, 2005
 Eligible Training Provider List, New Jersey Department of Labor and Workforce Development, October 2006.

Supply Chain Industries:

High School Career and Technical Education Programs and Graduates In the Greater Meadowlands Region

County	School	Number of Programs, 2005	Number of Graduates, 2005
Bergen	VOC-PARAMUS-SP NEED	3	7
	TECHNICAL SCH-TETERBORO	1	3
	TECHNICAL SCH-PARAMUS	2	6
Hudson	HCST JERSEY CITY CENTER	1	3
	HCST NORTH HUDSON CENTER	1	6
	KEARNY HIGH	1	6
	Other	1	1
Essex	BELLVILLE SR. HIGH	1	5
	ESSEX CTY V N 13TH ST NWK	2	3
	CENTRAL	1	9
	Other	4	27
Passaic	PASSAIC CO TECH INSTITUTE	2	29
Total		20	105

Manufacturing Industry: Postsecondary Training Programs In the Greater Meadowlands Region

Instructional Program	Number of Providers	Number of Programs
14.3501 Industrial Engineering	2	2
14.3601 Manufacturing Engineering	1	1
15.0404 Instrumentation Technology/Technician	2	2
15.0607 Plastics Engineering Technology/Technician	1	1
15.0612 Industrial Technology/Technician	3	4
15.0613 Manufacturing Technology/Technician	4	4
15.0701 Occupational Safety and Health Technology/Technician	3	4
15.0702 Quality Control Technology/Technician	3	4
19.0902 Apparel and Textile Manufacture	1	1
47.0000 Mechanics and Repairers, General	1	1
47.0101 Electrical/Electronics Equipment Installation and Repair	2	3
47.0105 Industrial Electronics Technology/Technician	1	1
47.0403 Locksmithing and Safe Repair	2	3
48.0501 Machine Tool Technology/Machinist	2	2
48.0508 Welding Technology/Welder	2	15
48.0801 Boilermaker	4	4
51.2206 Occupational Health and Industrial Hygiene	1	1

Source: SURE System, New Jersey Commission on Higher Education, 2005
Eligible Training Provider List, New Jersey Department of Labor and Workforce Development, October 2006.

Manufacturing Industry:

High School Career and Technical Education Programs and Graduates In the Greater Meadowlands Region

County	School	Number of Programs, 2005	Number of Graduates, 2005
Bergen	TECHNICAL SCH-TETERBORO	1	4
Essex	ESSEX CTY V N 13TH ST NWK	1	2
	Other	3	12
Passaic	PASSAIC CO TECH INSTITUTE	2	22
	JOHN F. KENNEDY HIGH	1	3
Total		8	43

Corporate Services and Real Estate:

Postsecondary Training Programs In the Greater Meadowlands Region

Instructional Program	Number of Providers	Number of Programs
09.0905 Health Communication	1	1
11.0601 Data Entry/Microcomputer Applications	10	10
11.0602 Word Processing	4	5
45.0601 Economics, General	5	5
52.0101 Business/Commerce, General	4	4
52.0201 Business Administration and Management, General	29	45
52.0204 Office Management and Supervision	3	3
52.0205 Operations Management and Supervision	3	8
52.0208 E-Commerce/Electronic Commerce	1	1
52.0299 Business Administration, Management and Operations, Other	2	2
52.0301 Accounting	18	20
52.0302 Accounting Technology/Technician and Bookkeeping	29	45
52.0305 Accounting and Business/Management	2	3
52.0401 Administrative Assistant and Secretarial Science, General	52	112
52.0402 Executive Assistant/Executive Secretary	2	2
52.0406 Receptionist	3	4
52.0407 Business/Office Automation/Technology/Data Entry	28	65
52.0408 General Office Occupations and Clerical Services	29	41
52.0411 Customer Service Support/Call Center Operation	4	5
52.0601 Business/Managerial Economics	1	1
52.0701 Entrepreneurship/Entrepreneurial Studies	3	3
52.1001 Human Resources Management/Personnel Administration, General	4	4
52.1005 Human Resources Development	1	1
52.1101 International Business/Trade/Commerce	8	12
52.1201 Management Information Systems, General	20	35
52.1299 Management Information Systems and Services, Other	2	2
52.1301 Management Science, General	4	4
52.1501 Real Estate	9	28

Source: SURE System, New Jersey Commission on Higher Education, 2005

Eligible Training Provider List, New Jersey Department of Labor and Workforce Development, October 2006.

Corporate Services and Real Estate:

High School Career and Technical Education Programs and Graduates In the Greater Meadowlands Region

County	School	Number of Programs, 2005	Number of Graduates, 2005
Bergen	BERGEN ACADS HACKENSACK	1	49
	VOC-PARAMUS-SP NEED	1	4
	TECHNICAL SCH-TETERBORO	1	8
	TECHNICAL SCH-PARAMUS	1	2
	BERGENFIELD HIGH	1	7
	FORT LEE HIGH	1	9
	HACKENSACK HIGH	2	41
	LODI HIGH	1	49
	LYNDHURST HIGH	1	8
	NORTH ARLINGTON HIGH	2	52
	RIDGEFIELD PARK JR SR HS	1	1
	WALLINGTON JR SR HIGH SCH	2	16
	WOOD-RIDGE HIGH	2	26
Hudson	HCST JERSEY CITY CENTER	3	16
	HCST NORTH HUDSON CENTER	2	17
	KEARNY HIGH	2	12
	EMERSON HIGH	3	77
	MEMORIAL HIGH	1	45
	Other	7	516

County	School	Number of Programs, 2005	Number of Graduates, 2005
Essex	BELLVILLE SR. HIGH	2	17
	BLOOMFIELD HIGH	2	67
	ESSEX CTY V N 13TH ST NWK	1	54
	IRVINGTON HIGH SCHOOL	2	13
	CENTRAL	1	14
	NUTLEY HIGH	2	12
	ORANGE HIGH	1	23
	Other	6	81
Passaic	CLIFTON HIGH	1	35
	LAKELAND REG H	1	4
	PASSAIC CO TECH INSTITUTE	5	80
	JOHN F. KENNEDY HIGH	3	38
	EASTSIDE HIGH	2	99
	WAYNE VALLEY HIGH	1	22
	WAYNE HILLS HIGH	2	16
Total (Four Counties)		67	1,530

Hospitality and Retail:

Postsecondary Training Programs In the Greater Meadowlands Region

Instructional Program	Number of Providers	Number of Programs
12.0501 Baking and Pastry Arts/Baker/Pastry Chef	4	4
12.0503 Culinary Arts/Chef Training	5	11
12.0504 Restaurant, Culinary, and Catering Management/Manager	1	1
12.0505 Food Preparation/Professional Cooking/Kitchen Assistant	8	8
12.0507 Food Service, Waiter/Waitress, and Dining Room Management	1	1
12.0508 Institutional Food Workers	1	1
31.0301 Parks, Recreation and Leisure Facilities Management	1	1
51.0913 Athletic Training/Trainer	1	1
52.0901 Hospitality Administration/Management, General	6	8
52.0903 Tourism and Travel Services Management	1	1
52.0904 Hotel/Motel Administration/Management	3	5
52.1803 Retailing and Retail Operations	6	10
52.1804 Selling Skills and Sales Operations	2	2
52.1902 Fashion Merchandising	2	3
52.1905 Tourism and Travel Services Marketing Operations	2	2

Source: SURE System, New Jersey Commission on Higher Education, 2005
 Eligible Training Provider List, New Jersey Department of Labor and Workforce Development, October 2006.

Hospitality and Retail:

High School Career and Technical Education Programs and Graduates In the Greater Meadowlands Region

County	School	Number of Programs, 2005	Number of Graduates, 2005
Bergen	BERGEN ACADS HACKENSACK	1	12
	VOC-PARAMUS-SP NEED	2	16
	TECHNICAL SCH-TETERBORO	1	6
	TECHNICAL SCH-PARAMUS	2	12
Hudson	HCST JERSEY CITY CENTER	1	11
	Other	3	16
Essex	ESSEX CTY V N 13TH ST NWK	1	2
	CENTRAL	1	5
	ORANGE HIGH	1	10
	Other	3	15
Passaic	PASSAIC CO TECH INSTITUTE	1	41
	JOHN F. KENNEDY HIGH	1	21
Total		18	167

Data Sources and Methods

The Heldrich Center analyzed the following types of data from these sources for Section 2:

- **Journey to Work 2000, U.S. Census Bureau**
 - Place of Residence of Meadowlands Workforce
- **Census 2000, SF3, U.S. Census Bureau**
 - Percent of Population with Bachelor's Degree or Higher
 - Percent of Population without Access to a Vehicle
 - Occupational and Industry Specialization of Workforce
- **New Jersey College and University Directory, New Jersey Commission on Higher Education**
 - List of Public Research Universities, State Colleges and Universities, Community Colleges, and Independent Four Year Colleges
- **SURE System, New Jersey Commission on Higher Education**
Eligible Training Provider List, New Jersey Department of Labor and Workforce Development
 - Number of Providers and Programs within selected training categories
- **Vocational Education Data System, New Jersey Department of Education**
 - Number of Programs and Graduates within selected training categories
- **New Jersey Transit**
 - Map of bus routes