

2026 CENTERSTATE CEO
ECONOMIC FORECAST
FOR CENTRAL NEW YORK

CenterState CEO is pleased to present its 2026 Economic Forecast Report for Central New York. The Economic Forecast Report is a source of strategic insight on regional, state and national economic trends. This report is developed with the input and expertise collected from CenterState CEO members and business leaders through an annual survey, with support from Research & Marketing Strategies, Inc. (RMS), a third-party market research firm. Collectively, this information provides a unique tool that can be used throughout the year as a source of strategic information across industries.



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POSITIVE MOMENTUM & OPTIMISM IN CNY:

Overall, business and community leaders expressed **optimism** about the year to come. Although optimism is still high, the quantitative rating results are slightly lower than the 2025 Economic Forecast Report. More than half (**52%**) shared that the **pace of growth** for their business in 2025 was about what was expected. Additional findings that exemplify the positive momentum and optimism in Central New York include:

54%

rated their **business performance** in 2025 as **above average or excellent**.

64%

believe their **business performance** in 2026 will be **above average or excellent**.

67%

described the **CNY region's economic health** in 2025 as **good or excellent**.

77%

shared they have a **positive economic outlook** for the **CNY region** in 2026.

PRESSURES & ECONOMIC IMPACTS:

The 2026 Economic Forecast shows that the **domestic economic conditions** are a major obstacle toward growth in Central New York. The two most significant issues negatively impacting business in 2025 were **federal policy or regulatory requirements/changes** and **U.S. trade policy** (e.g., tariff policy). Throughout the survey, individuals also commented on the impact of inflation and the cost to hire and retain qualified staff.

Participants identified the top three most prominent economic factors impacting Central New York businesses in 2026 as:

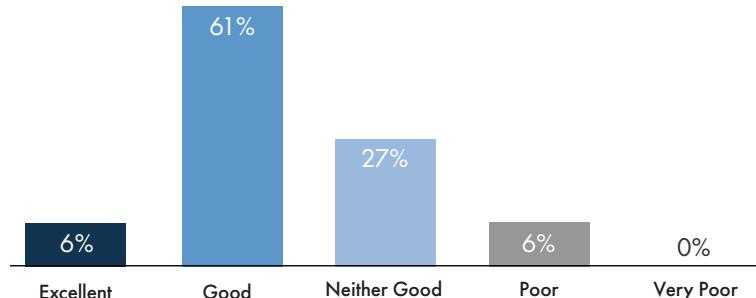
- **Federal policy or regulatory requirements/changes** (**64%**)
- **U.S. trade policy** (e.g., tariff policy) (**56%**)
- **Employee benefits and costs** (**53%**)

Other Pressures & Impacts:

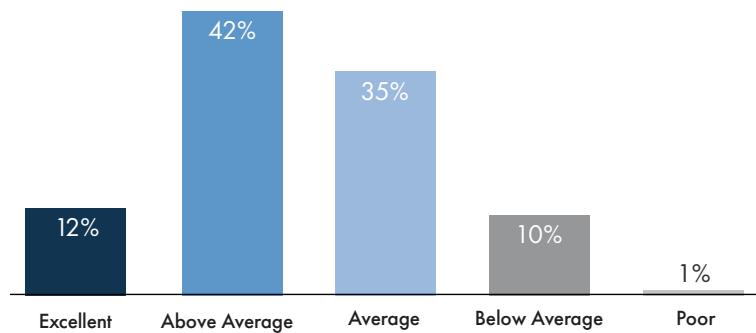
- **Labor:** **41%** shared that the availability of skilled personnel negatively impacted their business in 2025, and **70%** of respondents who plan to hire in 2026 stated that attracting and retaining talent was their biggest obstacle this past year. Local business leaders expressed this will continue to be a concern in 2026. Some worry there is not enough skilled labor to capitalize on the economic growth in the region. Others noted the rising costs of employee benefits and competitive rates will be challenging in the year ahead.
- **Government:** Many feel that government policy at both the state and federal levels, regulation and political uncertainty in general will negatively impact their businesses moving forward.
- **Housing:** Business leaders expressed concerns about the affordability and availability of housing, particularly with an anticipated growing workforce due to Micron and other opportunities.
- **Affordability:** Forecasters stated that rising costs of living and inflation will pose a challenge in the coming years.
- **Artificial Intelligence:** While many respondents are implementing or have already implemented AI into their operations, there is still uncertainty with this new industry, noting the need to weigh the technology's risks and benefits.

2025 Perspectives

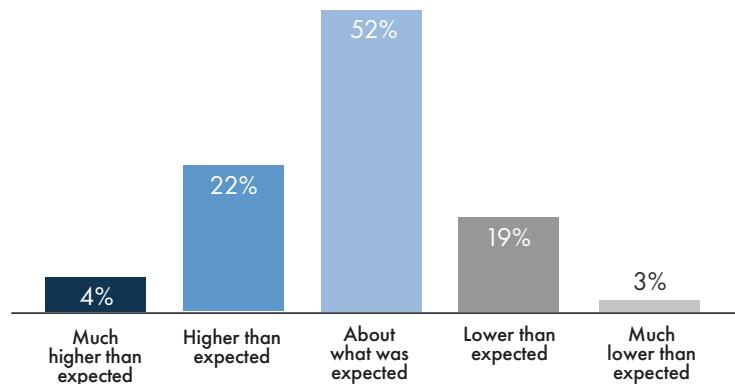
How would you describe the economic health of the Central New York economy in 2025?



How would you describe your business performance in 2025?



How would you describe the pace of growth for your business in 2025?



2025 Trends & Pressures

How did the following factors and/or conditions impact your business in 2025?

Artificial Intelligence (AI) development



Developing new products/services



International organizational or process changes



Strength of CNY economy



Consumer demand and preferences



Strength of U.S. economy



Availability of skilled personnel/workforce development



Interest rates and borrowing costs



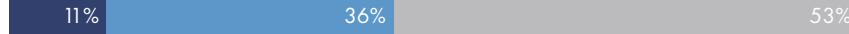
Access to capital (bank lending or investors)



U.S. tax policy



Employee benefits and costs



Federal policy or regulatory requirements/changes



State, regional, or local policy or regulatory requirements/changes



Cost/availability of materials and supply chains



U.S. immigration policy



NYS tax policy



U.S. trade policy (e.g. tariff policy)



Forecasters' **2026** Outlook

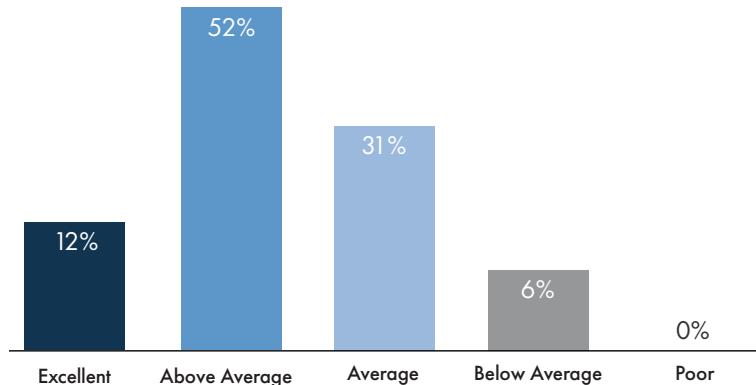
Forecasters were asked to describe their outlook for 2026 in one word or phrase.

Prepared by  RMS
Research & Marketing
Strategies, Inc.



2026 Outlook

What are your expectations for the performance of your business in 2026?



Note: Values do not add to 100% due to rounding.

What are your projections for 2026?

Overall Sales or Revenue



Products/Services



Jobs/ Hirings



Capital Investments



Geographic Markets



GROWTH NO CHANGE DECLINE

2026 Environmental Factors

To what extent do you expect the following environmental factors will impact your business or organization in 2026?

Innovation & Technology – Innovations within your industry and the advancement of technology as it applies to business operations.



Workforce & Talent – the ability to attract and retain the right people for existing and new positions, and/or the ability to invest in and develop the skills of the existing workforce.



Competition – the number of similar competitive product/service brands available; ability to capture new business opportunities, new markets or customers.



Government Policy & Regulatory Issues – existing laws, policies, mandates, government procedures or the current political environment.



Transportation & Logistics – the ability to effectively and efficiently move people and goods to markets locally, domestically and abroad.



Housing – issues related to availability and affordability for residents and new employees/talent.



Supply Chain – the ability to produce and distribute products to customers.



Social Forces – the impact of poverty and economic disparity on the region; issues of racial inequity and economic and social justice.



Positive Impact No Impact Negative Impact



2026 Product/Services Outlook

>60% of respondents reported expansion of products/services would increase in 2026.

What products/services do you expect to expand in 2026?

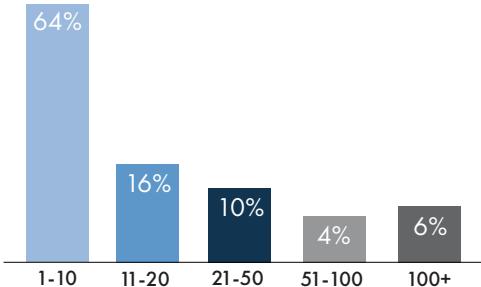
- Advanced semiconductor memory products.
- Services that will support the caregiver population.
- Deepening capacity-building support and professional development for nonprofits across the region. Marketing, fundraising, board governance and volunteer management support.
- Cancer care services and technology, mental health services, primary care and emergency medicine.
- Components for HVAC clean rooms, laboratories and hospitals, specifically for the filtration of contaminated air.
- New designs and marketing for areas where products are not currently sold.
- Professional engineering and consulting services.
- Property management, asset management.
- Commercial lending, new branches, acquisition of more broker dealers.



2026 Hiring Outlook

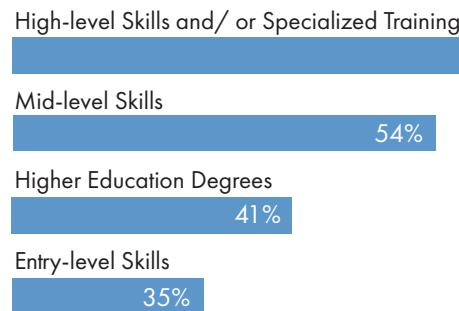
 **59%** of respondents reported jobs/hiring would increase in 2026.

If hiring in 2026, how many jobs does your business intend to add?



What skill level are you seeking for additional employees?

(Respondents were asked to select all that apply.)

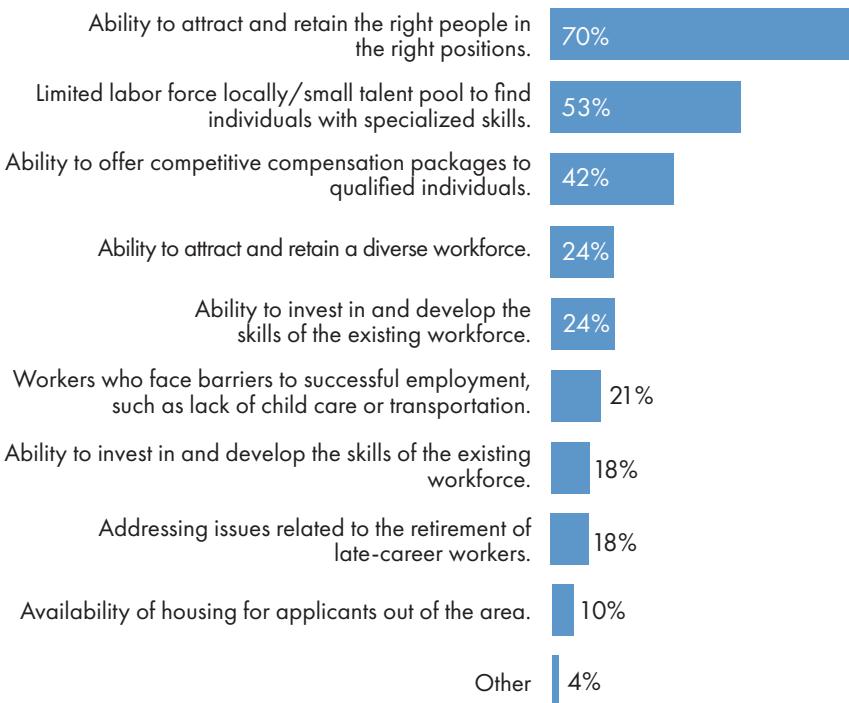


What is driving that trend in increased hiring?

- As more families move into the region, demand for child care, housing and community services will expand, requiring nonprofits to hire and grow alongside the private sector.
- Construction boom and infrastructure spending.
- Geographic expansion of business within Onondaga County, expanding service offerings, additional business.
- Retirement of long-term employees.
- Local/regional development, particularly Micron.

What hiring challenges do you expect in 2026?

(Respondents were asked to select all that apply.)



If you expect hiring to decrease in 2026, what is driving that trend?

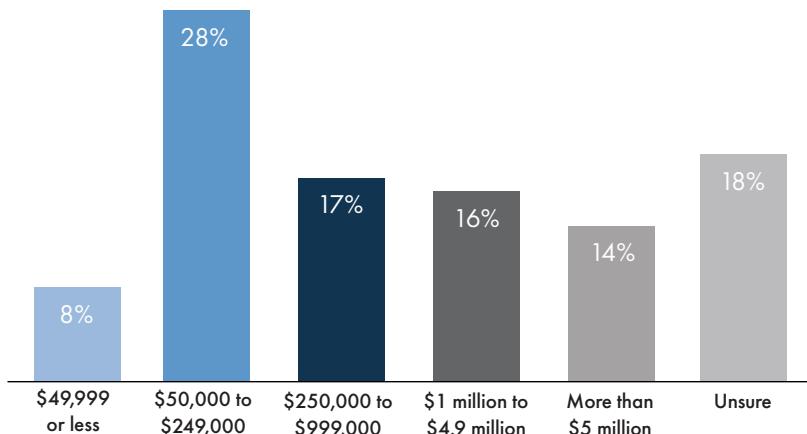
(Respondents were asked to select all that apply.)

- A slowdown in business overall. **(67%)**
- Shifting operating model or other business changes. **(33%)**
- Making investments (capital, technology, software, etc.) to increase efficiency without the need for more personnel. **(33%)**
- Using flexible hiring models to fill personnel needs (fractional models, traditional consulting, freelancer, "gig" workers, etc.). **(11%)**
- Other **(11%)**

2026 Investment & Sales Outlook

>53% of respondents reported capital investments would increase in 2026.

By how much do you expect to increase capital investments in 2026?



Note: Values do not add to 100% due to rounding.

What is driving the anticipated need for an increase in capital investments in 2026?

- Facility modernization and maintenance to meet new customer demand or expand capacity for growth
- Emerging technology for manufacturing machines. With a less experienced workforce, more technology-driven machinery is needed.
- Implementing AI leads to more capital investments and the ability to do more manufacturing in-house versus outsourcing.
- Renovations, upgrades, new signage.
- Expansion into new states.

>68% of respondents reported overall sales or revenue would increase in 2026.

By what percentage do you expect overall sales or revenue to increase or decrease in 2026?

- For those that expect an **increase**, they project, on average, an increase of **26%**.
- For those that expect a **decrease**, they project, on average, a decrease of **10%**.

What factors are driving plans for an increase in sales or revenue in 2026?

- Adding new products and services.
- Expansion into new markets; pulling back of competitors in certain markets.
- Increase in pricing; increase in profitability due to integration of AI into systems.
- Increased visibility for the organization and greater understanding of the organization's impact.
- Regional economic growth, increase in demand for health and wellness; growth in youth programs and child care.



Leading Opportunities

What emerging markets, consumer trends or other opportunities for the Central New York region will drive growth in 2026 and beyond?

Forecasters identified several emerging markets for the Central New York economy in 2026, with many related to the Micron project and other growth. Respondents shared that emerging industries include the [construction trades, advanced manufacturing](#) and various applications of [AI](#). Comments include:

- Semiconductor manufacturing, driven by Micron's investment, will be a key economic engine, creating ripple effects across advanced manufacturing, technology startups, supply chain logistics and other ancillary growth.
- An influx of new population will accelerate change. The local service economy might diversify, and successful small businesses will rise more quickly.
- Productive reuse of property will hopefully continue to preserve unique architecture while driving business.
- Construction, logistics and technology will likely be primary drivers in 2026. Proper diversification of small business will be important.
- Some expect that new immigrants to the region could drive the start of new businesses and accelerate further with the opening of the INSPYRE Innovation Hub by CenterState.
- Infrastructure and economic development investments in manufacturing and health care projects offer opportunities for growth.
- Small manufacturing, storage, residential housing, unmanned flight technology, general construction, smart manufacturing.

“

“Central New York's growth in 2026 and beyond will be shaped by workforce development tied to Micron and other advanced industries, the rising demand for health and wellness services as the population ages, and the need for affordable housing and child care to support working families.”

What industry trends do you see as major opportunities in 2026?

Individuals mentioned several opportunities regarding technological advancements, particularly understanding how to leverage AI and automation (in health care, manufacturing, and finance industries). Others see opportunities in 2026 related to construction. Forecasters cited trends that include:

- Investments in capital improvements related to automation have enabled adding new customers with larger volumes and more stringent demands.
- Continued adoption of AI and need to understand large databases; applications include health care delivery growth; school district education changes; and new manufacturing startups.
- Workforce development partnerships connected to advanced manufacturing, expanded health and wellness services as the population ages, and increased demand for child care and youth programs that support working families.
- Increased acceptance of drone technology for use in public safety applications.
- Increased need for housing in Central New York.
- Rising demand for preventative health, mental health support and chronic disease management programs.
- Workforce pipelines, youth STEM programs, and reskilling initiatives will be critical.
- Small business lending, insurance and wealth management.



Leading Challenges & Pressures

What industry trends do you see as major challenges for your business in 2026?

Survey participants cited concerns about finding and attracting talent; many expressed concerns that there is a lack of skilled labor in the region. Others cited housing, government regulations and competition for top-talent. Respondents also highlighted issues of poverty and addressing the needs of vulnerable populations. Comments include:

- Aging workforce, aging equipment, and the rising cost of raw materials.
- Anti-immigration policies, cuts in social service benefits and grant funding, inflation.
- Continued economic hardships, reduced discretionary spending, rising cost of materials and labor.
- Disconnect between the speed of business needs and the pace of talent readiness.
- Implementation of AI and managing the impact on current and future operations.
- Increasing costs for employee benefits, property and corporate insurance, as well as federal government uncertainties.
- Tariff uncertainties make it difficult to forecast any stability moving forward.
- Workforce shortages are leading to an upward spiral in costs; difficult regulatory climate.

“

“Workforce development (for reskilling & training new workforce), affordable housing, regional marketing (to draw in talent and build regional pride so people want to stay in the region), child care, and support for families of new workers are all very important. There will be growing pains.”

What are the region's most significant challenges in 2026?

- Construction projects that will affect egress into the city center.
- Development of housing at all price points, including affordable rental housing.
- Employers across sectors are still struggling to find and keep the right people, and enough qualified workers to meet employer demand.
- Work gaps in health care and skilled trades are putting pressure on operations.
- Federal funding cuts to Medicaid, SNAP and other safety net programs will increase the number of people living in poverty and homelessness.
- Infrastructure to handle the scaling of the region (housing, workforce, lending, building, etc.).
- Adequate state support for small, established business that are the fabric of the region's long-term success.
- Uncertainty in the marketplace due to supply chain issues and tariff changes.
- An increased number of people struggling to meet basic needs—food, housing, child care, and transportation.

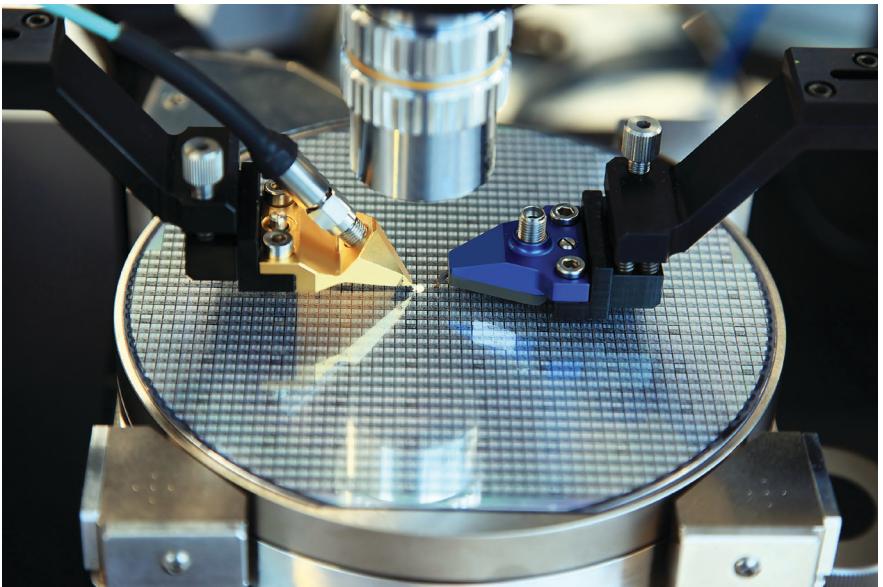


Innovation, Technology & Artificial Intelligence

 **74%** shared that innovation and technology will have a positive impact on their business.

Many of the organizations that participated in the survey shared they are implementing Artificial Intelligence (AI) or automation to help improve their operations. **A majority of respondents are in the exploration stage of AI adoption or already using AI in their daily operations** and consider themselves to be in the “early adoption” stages of AI implementation. Very few indicated they are not using AI at all. Ways that forecasters are implementing AI include:

- Code development.
- Marketing, IT and elsewhere in small steps.
- Looking to develop pilot projects using AI in Human Resources and program delivery.
- Customer support team is using AI to help resolve tickets faster by having it review ticket history and make suggestions.
- Actively building automations between different internal systems, using AI to build reporting, and integrating into bid/proposal process.
- For research and review of available data resources.
- Utilizing for meetings across languages and using AI as real time translator.
- Implemented it into legal research and document drafting.
- Using ChatGPT to help write basic marketing material, including emails and presentations.



Market Conditions & Business Climate

In 2026, forecasters suggest several trends influencing market conditions and the business climate. Many shared that they will be making **increased capital investments and starting new projects**. Others noted positive revenue and sales projections. However, survey participants say recruiting and retaining talent will be necessary to capitalize on growth opportunities.

Additionally, 64% of respondents shared that competition would have “no impact” on their business in 2026. For those who are looking to grow into new markets, expansion is planned mostly within New York state or the Northeast.



Percentage of respondents that expect to expand into the following new domestic and global markets in 2026:

 Central New York	66%	 Mexico	11%
 Upstate New York (Western New York, Finger Lakes, Southern Tier, North Country, Mohawk Valley, Capital District regions)	64%	 South America	7%
 Northeast U.S.	44%	 Eastern Europe	7%
 Southeast U.S.	27%	 Western Europe	7%
 Midwest U.S.	26%	 Southeast Asia	6%
 Downstate New York (Hudson Valley, New York City, Long Island regions)	25%	 Middle East	5%
 Southwest U.S.	22%	 Australia	5%
 West U.S.	20%	 Africa	4%
 Canada	17%	 South Asia	4%
		 Eastern Asia	4%
		 Central America	2%
		 Central Asia	2%



Opportunities in CNY's Emerging Technology Market

Forecasters were asked about their confidence in the region's path toward becoming a technology-focused hub of innovation, advanced manufacturing and entrepreneurialism. Most (74%) highlighted the potential for follow-on growth and investment as the greatest opportunity for the Central New York economy due to this trajectory.

They also identified leading opportunities and barriers to growth. Many (56%) are worried about the availability of specialized skilled workers locally and believe it could impede growth. The availability of affordable housing as population grows is also a considerable concern for forecasters.

► **64%** are moderately or extremely confident in CNY's transformation into a technology-focused hub of innovation, advanced manufacturing and entrepreneurialism.



► **84%** see their companies as beneficiaries of the anticipated growth of Central New York's technology sector.

Many that see themselves as beneficiaries shared the sentiment of "a rising tide lifts all boats," feeling that even if the growth is not directly related to their business, the benefits will ripple through various channels. Several mentioned population growth and an increase in businesses in the region as benefits of major investments in Central New York's innovation economy. They noted:

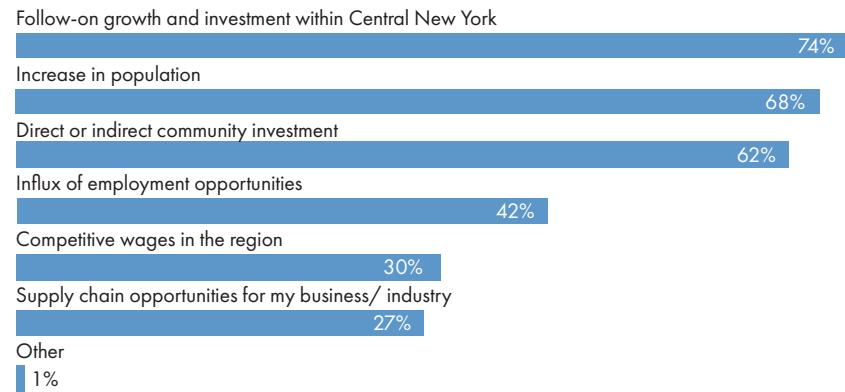
- A boost to the region brings more residents and a healthier economy for visitors, which increases sales and occupancy tax.
- Commercial and business lending should grow.
- Design opportunities related to changes needed in housing and education.
- Economic growth spurs construction spending.
- Increase in philanthropic giving and a larger pool of people able to volunteer.
- Growth of talent in Central New York.
- Opportunity to build partnerships with new companies moving into Central New York.

Those who do not see themselves as beneficiaries shared that their business is not directly impacted by the tech industry. Some felt growth in this area will increase competition in an already tight labor pool. Forecasters also cited factors such as having a primarily global customer base or a limited local labor force.

Tech Economy Opportunities

What are opportunities do you anticipate from the growth of Central New York tech economy?

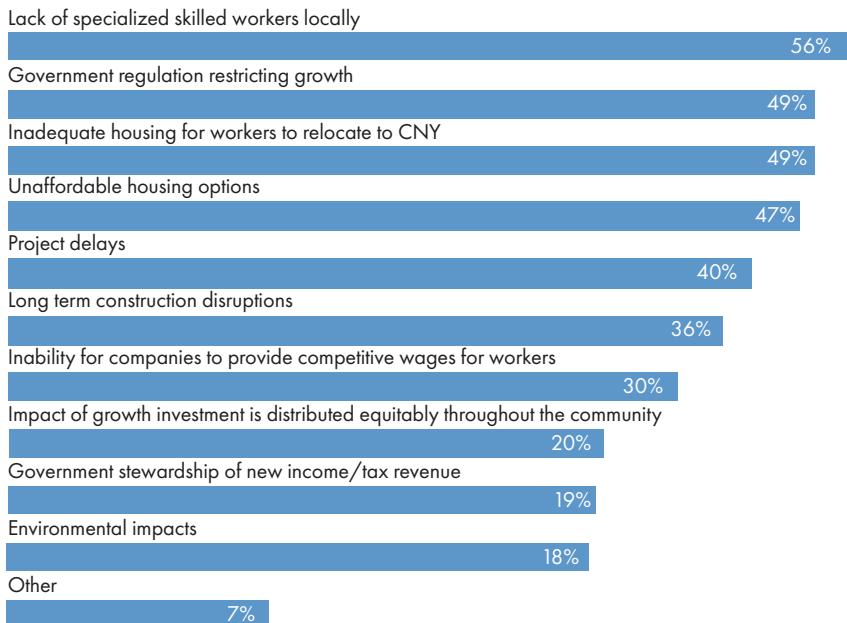
(Respondents were asked to select all that apply.)



Potential Barriers to Growth

What are the potential barriers to capitalizing on the anticipated growth for Central New York?

(Respondents were asked to select all that apply.)



The Region

The Central New York region includes: **Cayuga, Cortland, Madison, Onondaga and Oswego** counties. It is part of the larger 12-county CenterState New York region, which also includes Herkimer, Jefferson, Lewis, Oneida, Seneca, St. Lawrence and Tompkins counties.

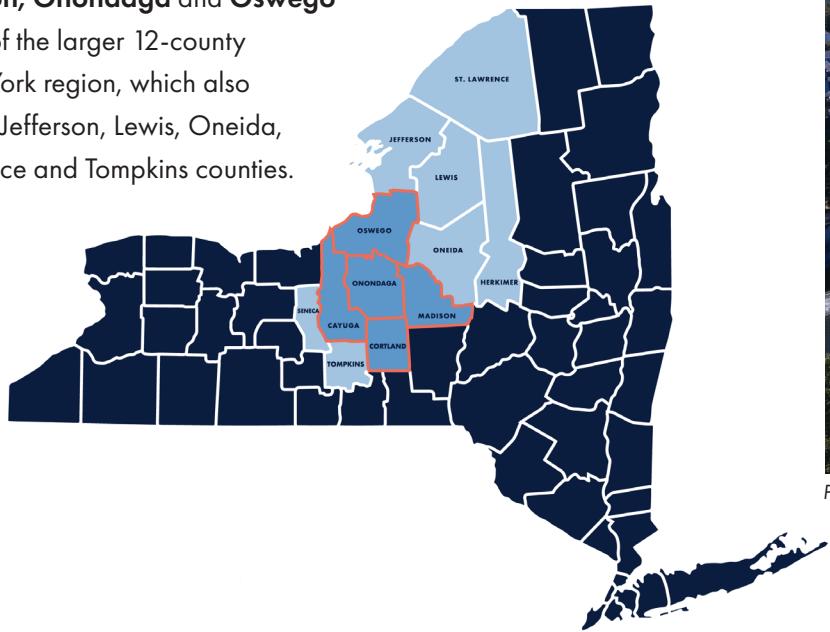


Photo Credit: Charles Wainwright Photography

Economic Indicators



Employment & Wages

- **Jobs in the Region: 359,411 ***
- **Average Annual Wages: \$67,144**
- **Wage Growth: 5.5%** increase in average annual wages per worker.



Job Gains

- **Private Sector Employment Change over the past year: 1.2% ***
- **4,096 nonfarm net jobs gained**, including **938 government jobs**, over the past year. The region gained **3,158 private sector jobs**.

Source: JobsEQ/BLS, QCEW. Data is for the five county Central New York region: Onondaga, Cortland, Cayuga, Madison and Oswego counties.

*As of Q2 2025, based on 4-quarter moving average.

Leading Industries

Leading industries in Central New York include **construction**; **health care**; **professional, scientific and technical services**; **educational services** and **manufacturing**.

The location quotient (LQ) compares local employment in an occupation or industry to national employment in that occupation or industry. An LQ higher than one indicates an occupation or industry is more concentrated in the area than in the nation, while an LQ less than one indicates it is less concentrated.

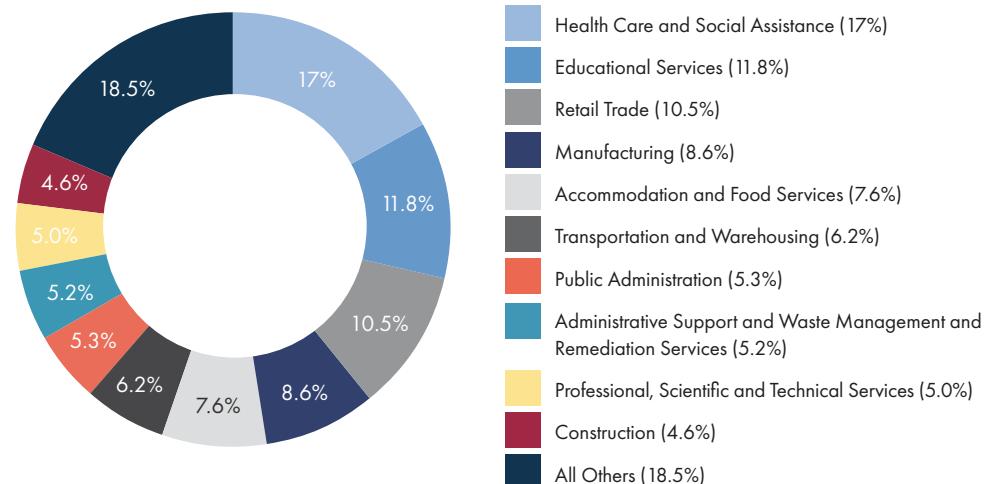
In Central New York, the strongest industry concentration remains **educational services**, with an LQ of 1.45, indicating the region has **45% more employment** in this sector than the national average. The industry represents **12% of total regional employment** and offers an average annual wage of **\$70,113**. **Health care and social assistance** also show above-average concentration, with an LQ of **1.11**, employing **17% of the regional workforce** and providing average annual wages of **\$70,154**. **Manufacturing** remains a core strength, with an LQ of **1.11** and **9% of total employment**. It offers one of the region's highest average wages at **\$84,166** annually. Despite its smaller share of employment, manufacturing's strong wage levels underscore its importance as a driver of higher-paying jobs in the regional economy.

In contrast, industries such as **retail trade** and **accommodation and food services** employ substantial portions of the workforce but offer significantly lower average wages, highlighting a persistent gap between high-employment and high-wage sectors.

Industry	LQ*	Employment*	Avg Ann Wages Per Worker	1 Year % Change in Avg Ann Wages per Worker
Health Care and Social Assistance	1.11	60,939	\$70,154	4.9%
Educational Services	1.45	42,316	\$70,113	2.6%
Retail Trade	1.09	37,617	\$40,417	2.0%
Manufacturing	1.11	30,967	\$84,166	4.9%
Accommodation and Food Services	0.87	27,157	\$27,411	1.3%
Transportation and Warehousing	1.22	22,109	\$52,816	2.0%
Public Administration	1.12	18,986	\$81,236	6.4%
Administrative and Support and Waste Management and Remediation Services	0.86	18,637	\$66,235	31.2%
Professional, Scientific, and Technical Services	0.69	18,021	\$88,701	3.5%
Construction	0.76	16,365	\$76,898	5.0%

*Four-Quarter Moving Average

Total Workers for the CNY Region by Industry



Source: JobsEQ/BLS, QCEW. As of Q2 2025, based on 4-quarter moving average. Data is for the five county Central New York region: Onondaga, Cortland, Cayuga, Madison and Oswego counties.

Small & Mid-sized Business Outlook

Navigating a Divergent Recovery

Small and mid-sized businesses are vital to Central New York's (CNY) economy, making up most local companies and nearly half of all jobs. These businesses are crucial for turning regional growth into job creation, community stability, wealth and shared prosperity.

Although job growth year over year was strong in CNY, the post-pandemic landscape has shown a "K-shaped" recovery: While large corporations have used their scale to increase employment and market share, many small and mid-sized businesses continue to see their workforce shrink.

The latest labor and business data also shows how systemic inequality continues to restrict the region's full economic potential. Overall, the data reveals that long-standing barriers lead to over \$17 billion in missed economic activity in the region. Removing these barriers would create more opportunities for small businesses and help the region attract and retain the benefits of new growth from major investments.



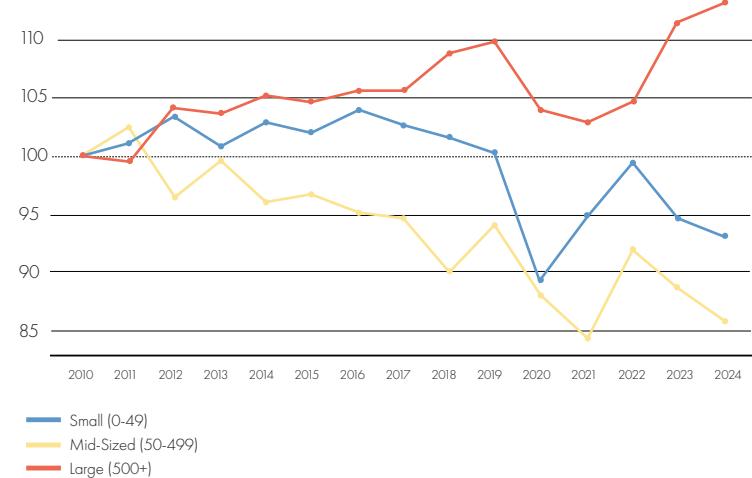
Regional Employment Trends

Based on data from the Quarterly Workforce Indicators (QWI) the Syracuse Metropolitan Statistical Area (MSA) is experiencing a historic shift in its employment landscape. While the region reached record-high total employment levels in 2024, the growth is increasingly concentrated in large-scale enterprises. Meanwhile, smaller firms struggle to regain their pre-pandemic footing.

Key Trends Since 2010:

- **Large Business Dominance:** Large firms (500+ employees) have shown the most consistent and resilient growth. As of 2024, employment in large businesses increased by more than 13% relative to its 2010 level.
- **Small Businesses (0-49):** While they saw a temporary boost around 2022, they ended 2024 at approximately 93% of their 2010 workforce levels.
- **Mid-Sized Firms (50-499):** This segment has faced the steepest long-term decline, now operating at just 85.6% of its 2010 employment levels.

Long-Term Employment Trends by Binned Size (2010 = 100)



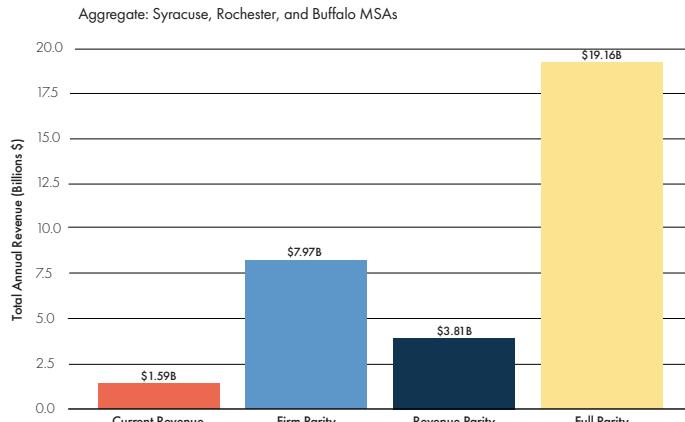
The Economic Case for Equity in the NY Smart I-Corridor

While major regional drivers signal a new era of growth, the small-business ecosystem in the Syracuse, Buffalo and Rochester corridor remains significantly underdeveloped for entrepreneurs of color. Current data shows a stark racial gap in business density and revenue. Following the same approach as [Hannah Stevens and Andre Perry at Brookings](#)^{*}, there is an estimated **gap of over \$17 billion across Buffalo, Rochester and Syracuse**.

Across Syracuse, Rochester and Buffalo, the gap in business ownership remains large and consistent: white-owned businesses range from 16 to 18 per 1,000 residents, while Black-owned businesses range from 2.3 to 4.7 per 1,000 residents. While the typical white-owned business in the area makes between \$3 million and \$3.6 million each year, Black-owned companies average between \$846,000 and \$1.1 million.¹

The economic future of Central New York will be partially determined by how the question of what the economy would look like if the share of Black-owned businesses were equal to the share of the Black population is answered. Bridging these gaps could serve as a major boost to the regional economy. Achieving ownership and revenue equality could generate over \$17.6 billion in new annual economic activity.

The Economic Potential of Black Business Parity



Source: U.S. Census Bureau, "Annual Business Survey (ABS) 2022" & "ACS 5-Year Estimates 2017-2022"

¹ Annual Business Survey (ABS), 2022; 2022 ACS 5-year Estimates; CenterState CEO Calculation

The "Missing Economy" breakdown

- **Current Revenue (\$1.59 billion):** The current combined annual revenue of Black-owned employer firms in the Syracuse-Buffalo-Rochester region.
- **Firm Parity (\$7.97 billion):** If the number of Black-owned businesses was at parity with the Black population.
- **Revenue Parity (\$3.81 billion):** If the current number of Black-owned businesses is held constant and average revenues were at parity with white-owned businesses.
- **Full Parity (\$19.16 billion):** If the number of businesses were at parity with the population and if average revenues were equal.

This underscores that the "Missing Economy" is not a single-issue problem. To address this, **barriers to entry must be lowered to increase the rate of business formation**, and the region must provide the capital and technical assistance necessary to scale micro-businesses into mid-sized and large enterprises. As Central New York enters a new chapter of growth, regional leaders are increasingly focused on fostering an economy that is both resilient and inclusive.

Achieving parity is not just a matter of fairness but also a strategic economic driver. While record-high employment in large-scale enterprises provides a strong foundation for Central New York, the long-term health of communities depends on a thriving small business sector to serve as a stabilizer. Transforming the regional corridor requires closing the ownership and revenue gaps that have historically sidelined entrepreneurs from socially and economically disadvantaged backgrounds.

^{*}<https://www.brookings.edu/articles/what-if-black-businesses-were-equitably-represented-in-every-metro-area-in-america/>

Thank You Forecasters

Nathan Andrews
Morse Manufacturing Co, Inc

Aminy Audi
L. & J.G. Stickley, Inc.

Michael C. Backus
Oswego Health

Cheryl Baldwin
Oswego YMCA

Beak & Skiff / Ayrloom

Jeffrey Bellamy
DACK Consulting Solutions

Brian M. Bisaccio
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ConnextCare

Dave Pettitt
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Jacob Picchione
GDI Integrated Facility Services

Jennifer Pichoske
Hematology Oncology Associates of CNY, PC

Thank You Forecasters

Meredith Price
St. Joseph's Health

Joanne Rauch
CR Fletcher Associates, Inc.

Andrew Raus
Colliers Engineering and Design

Kelly Reinhardt
BCA Architects & Engineers

Christian Roderick
Atlantic Testing Laboratories

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