Hudson Valley Cannabis Workforce Blueprint: Cultivating Careers 2025 (Pilot Study)

SURVEY DATA

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Introduction and Legal Context

This pilot workforce study was conducted in alignment with **New York State Finance Law § 99-ii**, which establishes the Cannabis Revenue Fund and authorizes research to measure the social, economic, and workforce impacts of New York's cannabis industry. The statute identifies core areas of analysis—job creation, workforce participation, economic activity, tax revenue, and social equity outcomes, which guide the scope of this report.

An **MOU between SUNY Orange and NYSC Connect Corp.** authorized the preparation, administration, and analysis of the **Hudson Valley Cannabis Workforce Blueprint: Cultivating Careers 2025 (Pilot Study)** on behalf of the Hudson Valley Education and Workforce Consortium (HVEWC). The purpose of the study is to gather data on workforce needs, hiring patterns, operational challenges, and the support functions required by both licensed cannabis businesses and ancillary industries.

This pilot is the **first regional workforce study** focusing specifically on the six-county Hudson Valley cannabis ecosystem: Dutchess, Sullivan, Orange, Ulster, Westchester, and Rockland Counties.

As a voluntary pilot study, results reflect the respondents who chose to participate and should be interpreted as highly representative but not exhaustive of the full Hudson Valley cannabis sector.

Glossary of Key Terms

- **Social and Economic Equity (SEE)**

  A designation created under the MRTA to prioritize individuals and businesses from communities disproportionately impacted by cannabis criminalization, including people of color, women, service-disabled veterans, distressed farmers, and residents of CDI neighborhoods.

- **Full-Time Equivalent (FTE)**

  A standardized measurement of employment used to quantify full-time staffing levels.
  One FTE typically equals **40 hours per week**, allowing part-time and full-time labor to be combined into a single metric for consistency across businesses.

- **Part-Time Equivalent (PTE)**

  A calculation that expresses part-time work in relation to a full-time schedule. Several part-time workers may combine to equal **one FTE**, depending on total hours worked.

- **Ancillary Business**

  Any business that supports the cannabis industry **without directly touching the plant**, such as accounting, insurance, compliance consulting, construction, logistics, IT, marketing, or packaging services.

- **Service Fulfillment Gap**

  A metric that measures the **difference between the percentage of licensees who need a service and the percentage of ancillary businesses providing it**.

  Formula:
  Fulfillment Gap = % Licensee Demand – % Ancillary Supply

  A negative gap indicates an **undersupplied or missing market service**, signaling potential anti-competitive risk.

- **Future Hiring Index (FHI)**

  The percentage of surveyed businesses that plan to hire additional employees within a defined period (typically 6–12months).
  A high FHI signals **strong expected job growth**, but when paired with a high skills deficiency, it also highlights workforce vulnerability.

- **Training Deficiency Rate**

  The percentage of surveyed businesses reporting a **"Lack of qualified candidates"** as a top hiring challenge.

This metric reflects the severity of the workforce readiness problem and is a central indicator of whether the sector can meet MRTA job creation targets.

<u>How to Read This Report</u>

This report uses standardized workforce metrics such as FTE, hiring rates, training deficiency, and service fulfillment gaps to quantify industry readiness. Tables follow a uniform structure: each provides (1) a data point, (2) the corresponding finding, and (3) the policy relevance.

Study Scope and Methodology

Survey Period: August 22, 2025 – November 12, 2025

This pilot study establishes the first regional baseline for job creation, workforce readiness, and equity outcomes in alignment with the year-over-year monitoring goals outlined in NYS Finance Law §99-ii. While limited to the Hudson Valley, the methodology and data structure provide a scalable foundation for future statewide workforce tracking.

Participation was voluntary. All respondents were active cannabis licensees or ancillary businesses operating in the Hudson Valley region at the time of the survey. Of the 85 total respondents, 73 were licensees, and 12 were ancillary businesses. Among the 73 licensee responses, two (2) declined consent, one (1) did not provide a license number, and two (2) licensees responded twice, resulting in duplicate entries, bringing the total valid licensee count to 68.

Survey Instruments:

Two surveys were administered:

1. **Licensee Workforce Survey**
2. **Ancillary Support Services and Workforce Survey**

Both surveys captured data on workforce size, staffing structure, hiring challenges, training needs, support services, and expectations for future growth.

Margin of Error and Representativeness

Licensee Survey

- **Population (N):** 170

- **Responses (n):** 68
- **Margin of Error (95% confidence): ±9.23%**

Important Note on Licensee Count Methodology:
Several respondents hold **multiple license types** (e.g., cultivation + processing + retail).
For statistical accuracy:

- Each business entity was **counted once** for the purpose of calculating sample size and margin of error
- Respondents were asked to **self-identify all license types held** so the study could analyze multi-license operations without inflating the total population
- This ensures the 68 responses represent **68 unique license-holding businesses**, not the number of individual licenses issued

This approach preserves the validity of the margin of error and ensures the results remain statistically reliable and representative of the region's licensee population.

Ancillary Business Survey – Methodological Note

New York State does not maintain a registry of cannabis-serving ancillary businesses. As a result:

- The **total population is unknown**
- **No statistical margin of error can be calculated**
- The **12 ancillary responses** should be interpreted as **directional insight**, not population estimates
- Invitations were sent to all known service providers during the survey window

Limitations of the Survey Data and Results

The limitations of this pilot survey, reflected in the results of this report, include:

- The respondents to the survey were licensees only in these counties in New York, namely Dutchess, Sullivan, Orange, Ulster, Westchester, and Rockland.
- The Survey did not address criminalization or decriminalization among the populations in these counties.
- The survey did not address drug treatment and prevention programs and services.

- The survey will not offer any comparisons among and between other licensees in counties not included in the surveyed area.
- All results reflect the perspectives of businesses voluntarily participating during the survey period.

The focus of the survey and its results will be to address the following questions

1. Determine the manpower impact with respect to the number of employees, i.e., full-time/part-time.
2. The extent to which the data show that 50% of the licenses and businesses are owned by the distinct SEE groups (MRTA goal), which includes people of color, minorities, women, distressed farmers, service-disabled Veterans, and people from communities most hurt by prior Cannabis use and law enforcement practices.
3. Determine what are some of the operational issues licensees are experiencing to date.
4. Determine what training needs and specific licensees suggest will enhance the overall performance of the staff in the industry.
5. Determine the extent and need for ancillary services to support the licensees and the Cannabis Industry as a whole.

List of Tables

Economic Footprint and Workforce Structure

This section summarizes the region’s cannabis labor market by detailing workforce distribution, capacity, and stability across license tiers and counties. Using FTE calculations, training deficiency rates, job structure, and wage trends, the analysis highlights both economic contributions and critical workforce gaps. The findings align with the economic impact and projection requirements of State Finance Law § 99-ii(3)(d)(iii)(G).

Table 1: FTE Calculation & Training Deficiency

Metric	Result	Calculation Details
Total FTE Count	800	Sum of Full-Time Equivalent (FTE) employees across all Licensee and Ancillary respondents.
Future Hiring Index (FHI)	93.75%	Percentage of all 80 respondents planning to hire in the next 6–12 months.
Top Training Deficiency Rate	53.75%	Percentage of all respondents who cited "Lack of qualified candidates" as a hiring Focus.

Findings:

The data indicates an early-stage economic impact with 800 FTEs currently employed by the surveyed Cannabis businesses.

The Future Hiring Index (FHI) of 93.75% signals a very strong intent among responding businesses to expand their workforce in the next 6–12 months. This aggressive growth trajectory is immediately threatened by a significant workforce quality issue: 53.75% of all businesses (43 out of 80 total respondents) identify a "Lack of qualified candidates" as a top hiring challenge. This demonstrates a clear and immediate top training deficiency that, if unaddressed, will impede the sector's mandated job creation and economic growth targets.

Table 2: Workforce Capacity & Stability

This section summarizes the current labor structure of the cannabis sector, focusing on job stability and the economic value of in-demand roles.

Workforce Capacity & Stability	Direct Job Creation and Labor Structure: Breakdown of roles, wages, and the stability of employment (FTE vs. Contract/Seasonal).	NYS Finance Law § 99-ii (3)(d)(iii)(G): Job creation, Workplace safety.	1. Top 3 Roles & Average Wages. 2. Contract Labor Ratio. 3. FTE per License Tier.	**Cultivation/ Other/General $21.00/hr. | Contract Ratio: 14.50% | Avg FTE (Supply/Retail): 23.29 / 5.91**

Table 3: FTE per License Tier (Licensee Only)

The capacity for job creation varies dramatically by license tier, demonstrating that supply-focused operations support substantially more full-time jobs than retail.

License Tier	Average FTE
Supply Tier	23.29
Retail Tier	5.91

Findings:

The average FTE per license for the supply tier is almost four times that of the retail tier.

Supply Tier (23.29) = Total FTE for all Supply Tier Licensees (489) divided by Count of Supply Tier Licensees (21)

Retail Tier (5.91) = Total FTE for all Retail Tier Licensees (278) divided by Count of Retail Tier Licensees (47)

Table 4: Employee Count by County (Geographic Impact)

This chart shows the distribution of full-time employment across the Hudson Valley region, highlighting the largest job creation centers.

County	FTE Count	PTE Count	Contractor Count	Seasonal Count	Total Count
Westchester	234	76	2	1	313

Dutchess	221	41	54	51	367
Ulster	152	33	23	14	222
Orange	152	45	8	1	206
Other	17	0	3	0	20
Rockland	10	0	0	0	10
Sullivan	11	17	4	1	33
Albany*	3	2	2	8	15
TOTAL	**800**	**214**	**96**	**76**	**1186**

**Data reflects respondent selections as submitted, including two Hudson Valley licensees who selected Albany County.*

Findings:

The total Full-Time Equivalent (FTE) Count reported across all listed counties and the "Other" category is 800. The four leading counties with 150 or more employees include Westchester, Duchess, Ulster, and Orange. The data suggests that there were three counties with 15 or fewer FTE's, namely (Rockland, Sullivan, Albany).

Table 5: Job Structure (Workforce Stability)

This chart breaks down the total workforce (1186 staff) into their employment types, illustrating the stability of the jobs created.

Job Type	Count	Percentage
FTE (Full-Time Equivalent)	**800**	67.45%
PTE (Part-Time Equivalent)	214	18.04%
Contract Workers	**96**	8.09%
Seasonal	**76**	6.41%
Total	**1186**	**100%**

Findings:

The data indicates that the full-time employees represent 800 or 67.45%, while part-time employees are 214 or 18.04%. Only 96 or 8.09% are contract workers. To maintain stability in the industry, it will be essential that the sector retains over ¾ of the employees as FTE. This low reliance on contract labor (less than 10%) suggests a focus on stable non-contract labor (less than 10%).

Table 6: Top 3 Roles & Average Wages

By consolidating and standardizing the reported roles, we identify the top areas of labor demand and their corresponding median raw wages.

Standard Category	Frequency Count	Median Weighted Wage (USD)
Cultivation/Other/General	31	**$21.00**
Customer Service/Sales	21	**$20.00**
Operations	19	**$34.00**

Findings:

- The data indicate that Customer Service/Sales $20.00 and Other/General roles (entry-level labor like Packaging, Trimming) show consistent hourly rates around $21.00.
- Highest Demand (Combined): The Cultivation/Other/General category dominates in frequency (31 mentions), confirming that basic labor, general staff, and cultivation roles represent the largest demand pool.
- The Operations median wage is significantly higher at $34.00, indicating that managerial and oversight roles in Operations are compensated at a higher annual salary rate, which was not converted to an hourly rate during the extraction process. This highlights that these roles command significantly higher compensation than entry-level labor.

  The data show an industry able to offer competitive starting wages, but sustaining those wages while retaining employees beyond one year will be a challenge.

Ancillary Ecosystem and Market Structure

This section analyzes the Ancillary Ecosystem by examining market maturity, specialization, and financial health, providing insight into the structure of licensed businesses and potential anti-competitive risks as cited in New York State Finance Law § 99 ii (3)(d)(iii)(E) & (G).

Table 7: The Ancillary Ecosystem: Market Structure

	Mapping the Support Sector & Competition: Analysis of market maturity, specialization, and financial health, addressing anti-competitive risks.	NYS Finance Law § 99-ii (3)(d)(iii)(E): Structure of licensed businesses. / NYS Finance Law § 99-ii (3)(d)(iii)(F): Anti-competitive behavior.	1. Largest Service Fulfillment Gap. 2. Cannabis-Focused Ancillary %. 3. Largest Median Revenue Ancillary	**Largest Gap (Accounting): 41.67% | Cannabis-Focused %: 41.67% | Median Revenue (Accounting): $375,000**

Table 8: Cannabis-Focused Ancillary Percentage

This metric measures the degree of specialization and market maturity in the support sector.

Metric	Result	Narrative
Cannabis-Focused Ancillary %	**41.67%**	Less than half (41.67 %) 5 of the 12 surveyed Ancillary businesses were created specifically to support the cannabis sector, suggesting the market is still in the early phase of developing specialized, cannabis-native support services 58.33%(7 out of 12) are traditional businesses (like accounting firms or consulting groups) that merely offer their services to the cannabis industry

Findings:

As we examine the data throughout the survey, there is evidence that licensees need the assistance of ancillary services if they are going to be efficiently run with respect to Accounting and Management, Compliance, HR, and IT areas of operation.

Table 9: Service Fulfillment Gap

The Service Fulfillment Gap compares the percentage of Licensees who demand (outsource) a service with the percentage of Ancillary businesses that supply it.

Service	% Licensee Demand	% Ancillary Supply	Fulfillment Gap (%)	Narrative
Accounting	50.00%	8.33%	**41.67%**	**Highest Unmet Demand.** Half of the licensees need support, but supply is critically low.
Compliance	35.29%	16.67%	**18.62%**	Significant gap in specialized regulatory and compliance services.
HR	14.71%	0.00%	**14.71%**	**Zero known supply**. All demand for HR services is currently unmet by the surveyed ancillary market.
IT	32.35	8.33%	**24.02%**	Significant unmet demand for IT support.
Marketing	17.65%	16.67%	**0.98%**	**Near equilibrium.** Supply is almost equal to demand, suggesting a competitive market.

Findings:

Fulfillment Gap (%) is calculated as % Licensee Demand minus % Ancillary Supply; higher values indicate greater unmet demand for that service within the regional cannabis market.

Based on the survey data, the most significant service gaps are in Accounting (41.67%), IT (24.02%), and HR (14.71%), underscoring that essential non-cannabis business functions remain the greatest unmet need. The findings also highlight continued demand for support with Compliance and IT, while Marketing remains an ongoing priority for cannabis licensees and the broader industry.

Table 10: Ancillary Median Revenue by Service Type

The financial capacity of the Ancillary service providers is analyzed using the median midpoint revenue, grouped by the services they supply.

Service	Provider Count	Median Revenue (USD)
Marketing	2	$25,000
Accounting	1	$375,000
Business Consulting	1	$175,000
Compliance	1	$25,000
Information Technology	1	$175,000
Insurance	1	$875,000
Retail Brick and Mortar	1	$175,000
Seed to Sale - Biotrack	1	$75,000
Solar Energy	1	$375,000
Non-Profit	1	N/A
Agricultural Products/Services	1	$1,500,000
Total Ancillary Respondents	12	N/A

Findings:

1. The ancillary services are equipped to provide ongoing support to the Cannabis Industry and the licensees in the mid-Hudson area of NY.
2. The sole identified Accounting provider within the Ancillary sector reported a median revenue of $375,000, representing the highest median revenue figure recorded for any single critical back-office support service within the current data sample.
3. Highest Revenue Niche: The single Insurance provider reports the highest median revenue at $875,000, followed by $375,000 for Accounting and Solar Energy.
4. Low Barrier to Entry: Marketing services, which have the highest provider counts, have the lowest median revenue ($25,000), suggesting a low barrier to entry and high competition in these fields.

Social Equity and Access to Opportunity

This section assesses the success of the Social and Economic Equity (SEE) policy in the surveyed cohort, quantifying ownership success and identifying employment and training barriers, addressing the scope of SEE.

Note: Some survey questions allowed multiple selections; therefore, counts may exceed the total number of respondents.

Table 11: SEE Workforce Representation & Ownership Summary

Social Equity and Access to Opportunity	Quantifying SEE Success and Barriers: Assessment of the policy's success in driving equity ownership and employment for communities disproportionately impacted (CDI).	NYS Finance Law § 99-ii (3)(d)(iii)(G): Criminal justice impacts (redress goal).	1. FTE SEE Workforce Representation %. 2. Hiring Challenges filtered by SEE Status. 3. Partnership Willingness (L-Q44, A-Q35).	SEE Rep %: 49.63% | SEE Focus Rate: 54.17% | Partnership Willingness: 87.50%

The majority of the surveyed licensee population identified as SEE-Owned (48 out of 68 or 70.58%).

Quantifying SEE Success and Barriers

Metric	Result
FTE SEE Workforce Representation % (Strict)	49.63%
Hiring Challenges (Lack of Qualified Candidates) within SEE Companies	54.17%

Findings:

1. **SEE Workforce Representation %:**
   The cohort surveyed shows high alignment with social equity goals; 49.63% of the total reported FTE count is currently employed by SEE-Owned companies.

This figure suggests that significant job creation is occurring within the equity framework.

2. **Hiring Challenges within SEE Companies:**

   The data suggests that 54.17% (26 of 48) of SEE-Owned companies report that a lack of qualified candidates is a top hiring challenge. This demonstrates that while the policy has succeeded in establishing equitable ownership, the lack of a qualified talent pipeline remains the primary obstacle to the next phase of job creation and growth for these equity-focused businesses.

3. **The SEE licensee representation is within the MRTA goal,** which states that 50% of the licensees shall be owned by "people of color, minorities, women, distressed farmers, service-disabled Veterans, people from communities most hurt by prior Cannabis use and law enforcement practices."

Table 12: Partnership Willingness to collaborate with Educational Institutions

A substantial percentage (87.50%) of businesses are ready to collaborate with educational institutions, thus providing an avenue for closing the noted training gaps and workforce readiness.

Metric	**Result**	**Calculation Details**
Overall Partnership Willingness %	87.50%	87.50% of all respondents are open to partnering (70 out of 80).
Breakdown (Count)	SEE License: **42 willing** Non-SEE Licensee: **17 willing** Ancillary: **11 willing**	70 businesses in total are ready to engage in partnerships for curriculum, internships, or advisory roles, indicating high receptivity for programs designed to address the talent gap.
Non-SEE Partnership Willingness %	85% are willing	**Non-SEE Licensee:** 17 willing out of 20 companies

Findings:

The high willingness to partner provides a clear avenue for implementing curriculum and training programs specifically designed to close the 54.17% skills and hiring challenge identified among SEE licenses. Training and skills development are clearly recognized as an urgent workforce need in the Hudson Valley region.

Table 13: MRTA-Aligned FTE Breakdown

Metric	Count/Value	Percentage %
FTEs from Licensees claiming Non-SEE/Ambiguous Status	375	46.9%
FTEs from Ancillaries claiming "None" Status	28	3.5%
FTEs in STRICTLY SEE Companies	397	49.6%
Total FTE Count (Denominator)	800	100%

Findings:

STRICTLY SEE FTEs: 49.6% (397 FTEs) are employed by companies that clearly qualify as SEE-Owned (i.e., they claimed a status and did not simultaneously claim "None" or "Prefer not to answer").

- **Non-SEE/Ambiguous FTEs**: The remaining 46.9% (375 FTEs) come from Licensee companies where the SEE status is either unstated, ambiguous, or explicitly non-SEE.
- These positive findings for SEE companies and their employees underscore increased employment opportunities that align with the MRTA's priority to advance SEE licensees across New York State and its counties.

Table 14: Hiring Challenges Filtered by SEE Status

Metric	Result	Narrative
Hiring Challenges (Lack of Qualified Candidates) within SEE Companies	**54.17%**	SEE-Owned companies reported the challenge of finding and hiring qualified employees.

Findings:

The data shows **54.17**% of SEE-owned companies report difficulty finding qualified candidates, indicating a notable hiring barrier within the state's equity licensee group.

Table 15: MRTA SEE Ownership Status Breakdown

MRTA Category	Count	Sector
Woman-Owned	24	Licensee
Minority-Owned	16	Licensee
Located in a Community Disproportionately Impacted by Cannabis Prohibition	2	Licensee
Distressed Farmer	2	Licensee
Veteran-Owned	2	Licensee
State of Local Registered MWBE	2	Licensee

MWBE Category	Count	Sector
Woman-Owned	7	Ancillary
Minority-Owned	1	Ancillary
Located in a Community Disproportionately Impacted by Cannabis Prohibition	1	Ancillary
State of Local Registered MWBE	1	Ancillary

Findings:

- It appears from the sample surveyed that the MRTA goal of 50% has been met by this sample. The data shows that 48 or 70.59% of the 68 licensees are SEE-Owned licensees. It should be noted that 7 of the 10 Ancillary entities were owned by Minority women.
- Gender and Race/Ethnicity are the most frequently cited ownership statuses across both sectors, with Woman-Owned being the single most common category overall (24 total mentions as women-owned licensees and 7 were women-owned ancillary).

- The status of being Located in a Community Disproportionately Impacted by Cannabis Prohibition has been cited 4 times in total (3 licensees and 1 ancillary located in a Community Disproportionately impacted by Cannabis), indicating a direct geographic involvement.
- It should be noted that the Ancillary sector shows a single mention of a State of Local Registered MWBE (Minority and/or Women-Owned Business Enterprise).

Skills and Training Needs Identified

This section serves as a Roadmap for SUNY/CUNY and other educational providers, using data to drive curriculum recommendations necessary to resolve the widespread "Lack of Qualified Candidates," aligning with the NYS Finance Law § 99 ii (3)(d)(iii)(G) Economic impacts (workforce readiness) goal.

Note: Some survey questions allowed multiple selections; therefore, counts may exceed the total number of respondents.

Table 16: Skills and Training Needs Identified

Skills and Training Needs Identified	Roadmap for SUNY/CUNY: Data-driven curriculum recommendations to resolve the labor shortage and address the "Lack of Qualified Candidates."	NYS Finance Law § 99-ii (3)(d)(iii)(G): Economic impacts (workforce readiness).	1. Lack of Qualified Candidates Rate. 2. Top 5 Skills/Certifications Needed. 3. Training Types Requested.	**Top Deficiency Rate: 53.75%** | **Top Skill (Count) Other (General labor) (98)** | **Top Training Request (Count): Budtender/Retail Skills (15)**

Table 17: Lack of Qualified Candidates Rated

Metric	Result	Narrative
Lack of Qualified Candidates	**53.75%**	Over half of all surveyed cannabis businesses (43 out of 80) identify the lack of

		qualified candidates as a Top Deficiency Rate. This demonstrates an urgent need for targeted educational programming.

Findings:

This data shows that the lack of qualified candidates underscores the need for more skilled workers entering the cannabis industry. The primary rationale for educational intervention is the industry's significant shortage of qualified talent, a challenge identified by most owners and licensees as a major barrier to their operations.

Table 18: Standardized Cannabis-Related Workforce Comments

Sector	Standardized Theme	Comment Snippet	Source Column
Licensee	**Retail/Sales Focus [1]**	Proper marketing. Also need people who really know about cannabis and how to educate dispensaries and consumers about cannabis and the products they are selling....	What cannabis roles are currently in high demand...
Licensee	**Retail/Sales Focus [1]**	Budtenders - $16 - $18 No Micro dispensaries Cannabis Management	What skills or credentials will become important i...
Licensee	**Retail/Sales Focus [1]**	Budtender Expert budtenders Lower-level SUNY graduates of Cannabis Cuts	What skills or credentials will become important i...
Licensee	**Retail/Sales Focus [1]**	BUDTENDERS for sure at $18 an hour. BUDTENDERS are the most important as they take the customers	Where do you see the most growth in cannabis jobs ...

		orders most the time fill the Order as...	
Licensee	**Retail/Sales Focus [1]**	Budtender right now is probably the most sought after position as an entry to the industry. Industry standard is generally 17.50 but at	Where do you see the most growth in cannabis jobs ...
Licensee	**Retail/Sales Focus [1]**	Inventory Purchasing, Marketing There needs to be New York Based cannabis Consulting companies Retail and Marketing Every area is different Agriculture would help , Customer...	Are there any new roles you anticipate becoming es...
Licensee	**Compliance/Metrc Needs [2]**	Budtenders Inventory managers Compliance officers Thorough knowledge of cannabis and all of its effects.	What skills or credentials will become important i...
Licensee	**Compliance/Metrc Needs [2]**	Inventory Managerial Retail, processing Cannabis tax and compliance,	What skills or credentials will become important i...
Licensee	**Compliance/Metrc Needs [2]**	Experienced Budtender $19 AGM Management. Prior experience is hard to find in a new market. Metrc certification	What skills or credentials will become important i...
Licensee	**Compliance/Metrc Needs [2]**	Material and Inventory Coordinator Seed to Sale administrator Seed to Sale administrator, Metrc	Are there any new roles you anticipate becoming es...

		will be live and it will be NYS required to use the...	
Licensee	**Compliance/Metrc Needs** [2]	Sales Manager Brand Representative Logistics Coordinator Packaging Technician Edible Technician Preroll Technician Cultivation Technician METRC administrator (combination of QC and Compliance functions) Orange County has...	Are there any new roles you anticipate becoming es...
Licensee	**Knowledge/Science Gap** [3]	Budtender $17 Consultant Geographies Cannabis knowledge as a whole, full cycle.	What skills or credentials will become important i...
Licensee	**Knowledge/Science Gap** [3]	Budtenders Delivery possible and outside sales N/a Knowledge of the medicinal side of cannabis and more knowledge of the farm its grown on	What skills or credentials will become important i...
Licensee	**Knowledge/Science Gap** [3]	Budtender $20 No Sales and marketing Cannabis knowledge intro personal skills	What skills or credentials will become important i...
Licensee	**Labor/Hiring Focus** [4]	Trimmer $100/pound yes but no one is making money. Employees are the highest cost of most businesses. Not sure how	What skills or credentials will become important i...

		small operators with no support...	
Licensee	**Labor/Hiring Focus** [4]	The highest-demand positions have high turnover. For us this is complicated by a rural location. We aren't yet able to afford health insurance and other...	What skills or credentials will become important i...
Licensee	**Operations/Logistics** [5]	All Inventory manager Knowledge of cannabis	What skills or credentials will become important i...
Ancillary	**Retail/Sales Focus** [1]	Salesperson average is $60,000 or better TBD Rochester area and I think anything related to cannabis supply chain Same as above I think there needs...	Where do you see the most growth in cannabis jobs ...
Ancillary	**Retail/Sales Focus** [1]	Not sure Not sure Distribution Not sure Cannabis Sales & Marketing	What types of training or certifications would you...
Ancillary	**Retail/Sales Focus** [1]	Creative - hourly and depends on experience, wages range from 60-125/hr in my team. Digital Marketing/Community Management/Events Right now it seems processing, dispensaries and budtenders...	What skills or credentials will become important i...

Findings:

1. Retail/Sales Focus (9 comments): The dominant theme across both sectors; emphasizing the need for customer-facing roles and retail skills.
2. Compliance/Metrc Needs (5 comments): Strong demand for workers skilled in Metrc certification, compliance officers, and cannabis tax/regulatory adherence.
3. Knowledge/Science Gap (3 comments): Direct requests for cannabis knowledge as a credential, specifically the medicinal side and product effects.
4. Labor/Hiring Focus (2 comments): Mentions of high turnover, high labor cost, and geographic Focus (rural location).
5. Operations/Logistics (1 comment): Focus on inventory management roles.

Table 19. Top 5 Skills/Certifications Needed

Curriculum should be prioritized based on the most frequently mentioned roles and skills identified by the industry. These skills and competencies were considered essential to the current efficient operation of their businesses and to the future maintenance of their businesses.

Rank	Standard Category	Frequency Count	Percentage
1	Other (general manual labor)	98	49.25%
2	Operations	50	25.13%
3	Customer Service/Sales	43	21.61%
4	Cultivation	6	3.02%
5	Compliance/Regulatory	2	1.01%
	Total	199	100%

Findings:

- Other/General Labor remains in the dominant category, accounting for nearly 49.25% of all categorized job needs.
- Operations and Customer Service/Sales together make up over 46% of the categorized demand, highlighting the sector's focus on logistical management and retail interaction.

Table 20: Training Types Requested by Licensees

Direct requests from respondents confirm the need for practical, sector-specific training.

Rank	Standard Category	Frequency Count	Percentage
1	Budtender/Retail Skills	15	33.33%
2	Business/Management	11	24.44%
3	Compliance/Regulatory	10	22.22%
4	Cannabis Inventory/POS	5	11.11%
5	Cultivation/Processing	4	8.89%
	Total	45	100%

Findings:

- The data in this table suggests that the top three labor issues were Budtender/Retail Skills (33.33%), Business/Management (24.44%), and Compliance/Regulatory (22.22%). Surprisingly, the need for Cannabis knowledge is not emphasized in this table, but it is raised as an issue in other survey questions.

MRTA Economic & Equity Monitor and Policy Alignment

Findings and Policy Recommendations

This section translates the data-driven findings into specific, actionable amendments or regulatory changes, providing a roadmap for the Governor and Legislature to address systemic challenges and fulfill the MRTA's equity and economic goals.

Policy Recommendations	Actionable Amendments: Translating findings into specific regulatory or legislative changes for the Governor and Legislature.	NYS Finance Law § 99-ii (3)(d)(iii): Recommendations for possible amendments to the cannabis law.	Narrative Driven: e.g., Tie the largest Service Fulfillment Gap to a proposed grant program.	**Narrative Driven** (Based on 53.75% Top Deficiency and 41.67% Accounting Gap)

Table 21: Address the Workforce Crisis: Mandate Curriculum Investment

Data Point	Finding	Recommendation
Lack of Qualified Candidates	**53.75% of all** businesses report a lack of qualified candidates as a challenge. (**Top Deficiency Rate %)**	**Establish a "Cannabis Workforce Development Mandate"** requiring a percentage of cannabis tax revenue be dedicated to fund curriculum development and certification programs at SUNY/CUNY and community colleges.
Top 5 Skills Needed	1. Other (general manual labor) 2. Operations, 3. Customer Service/Sales, 4. Cultivation, 5. Compliance	**Mandate that state-funded curricula prioritize immediate needs** in Budtender Certification, Compliance/Regulatory (e.g., METRC), and Inventory Management over traditional cultivation science.
Overall Willingness to partner	**87.50% of** respondents (70 total) are willing to partner with educators.	Host technical assistance meeting (comprising Licensees, Ancillary, SUNY & University personnel) to

		directly inform curriculum standards and ensure immediate workforce readiness. (Total Respondents Willing to Partner: 70)

Table 22: Mitigate Anti-Competitive Risk: Bolster Critical Ancillary Supply

The extreme market imbalances in crucial support functions create anti-competitive risks and impede the efficiency of SEE-Owned businesses.

Data Point	Finding	Recommendation
Highest Fulfillment Gaps	**Accounting (41.67% demand/supply gap) and HR (14.71% demand/supply gap).**	**Establish an "Essential Services Grant Program"** to incentivize the creation and expansion of certified ancillary providers in high-gap services (Accounting, HR, specialized compliance). This will inject competition, drive down costs, and ensure all licensees have access to crucial back-office support.
Ancillary Revenue (Accounting Median)	$375,000	Implement a **Preferred Technical Assistance Vendor List** that requires providers to demonstrate capacity to serve the entire region and meet certain quality standards, preventing single-source dependencies and fostering a competitive market environment.

Table 23. Fortify Social Equity Success: Directly Fund SEE Capacity

Given that a majority of surveyed licensees (70.59%) are SEE-Owned, any program designed to advance the state's equity goals must directly support capacity-building within these businesses.

Data Point	Finding	Recommendation
FTE SEE Workforce Representation	**397 (49.63%)** of all 800 FTEs in the sample are employed by SEE-Owned companies.	Establish a SEE Training Credit that reimburses SEE-owned licensees for a significant portion (e.g., 50%) of the cost of sending existing employees to state-approved certification and upskilling programs (e.g., Budtender training, METRC/seed-to-sale, compliance, operations). This directly targets the **54.17**% hiring/skills challenge rate within the equity cohort and builds capacity from within.
SEE Ownership Representation	**70.59%** of surveyed licensees (48 of 68) are SEE-Owned, meeting and exceeding MRTA's 50% equity participation goal.	Link capacity-building funds to SEE business stabilization, enabling equity-owned companies to retain staff, reduce turnover, and expand hiring in underserved communities.
Future Hiring Index	**93.75%** of all companies plan to hire, indicating a high growth rate.	**Fast-track Commercial Lending and Grant programs** for SEE-Owned companies, linking funding to projected FTE growth targets to support high growth intent and facilitate large-scale job creation.

Table 24: Workforce Metrics and Measurements – Economic Scale

This table presents key performance indicators (s) related to Economic Scale, which align with the NYS Finance Law § 99-ii (3)(d)(iii)(G) statutory citation focusing on job creation and economic impacts.

Metric Category	Source	Value	Interpretation
Economic Scale (NYS Finance Law § 99-ii (3)(d)(iii) G))	**Total FTE Count**	**800**	This data shows the employment across the Cannabis Industry in the Hudson Valley region.
Economic Scale (NYS Finance Law § 99-ii (3)(d)(iii)(G))	**Future Hiring Index**	**93.75%**	The percentage of all businesses surveyed (75 out of 80) indicated plans to expand their workforce or services, signaling the sector's **high anticipated growth rate**.

The results confirm the current economic impact and future growth potential.

Table 25. Workforce Metrics and Measurements – Labor Structure

This table presents a key performance indicator (KPI) related to Labor Structure, which aligns with the NYS Finance Law § 99 ii (3)(d)(iii)(G) statutory citation focusing on job stability and quality.

Metric Category	Source	Value	Interpretation
Labor Structure (NYS Finance Law § 99-ii (3)(d)(iii) (G))	**Contract Labor Ratio**	**14.50%**	The total number of contracted staff (172) as a percentage of the total workforce (1186) across all Licensee and Ancillary respondents. A lower ratio suggests a greater focus on stable, in-house employment (FTE and PTE).

Table 26. Workforce Metrics and Measurements – Market Structure

This table presents key performance indicators (KPIs) related to Market Structure, which aligns with the NYS Finance Law § 99 ii (3)(d)(iii)(E) & (F) statutory citations focusing on business structure and anti-competitive behavior.

Metric Category	Source	Value	Interpretation
Market Structure (NYS Finance Law § 99-ii (3)(d)(iii)(E) & (F))	**Service Fulfillment Gap % (Largest: Accounting)**	**41.67%**	The largest unmet demand gap, representing the difference between the percentage of Licensees needing Accounting support (50%) and the percentage of Ancillaries supplying it (8.33%). This gap signals a potential market failure, creating risks of anti-competitive dependence on a small set of providers.
Market Structure (NYS Finance Law § 99-ii (3)(d)(iii)(E) & (F))	**Cannabis-Focused Ancillary %**	**41.67%**	The percentage of ancillary businesses created specifically to support the cannabis sector. This indicates that the support market is still in a nascent stage, with most providers being traditional businesses, which may lack the specialized expertise needed by licensees.

Table 27. Workforce Metrics and Measurements – SEE Workforce Representation

This table presents a key performance indicator (KPI) related to the Skills Gap, which aligns with the NYS Finance Law § 99 ii (3)(d)(iii) (G) statutory citation focusing on economic impacts and workforce readiness.

Metric Category	Source	Value	Interpretation
Social Equity	**FTE SEE Workforce Representation %**	**49.63%**	The percentage of the total 800 Full-Time Equivalent (FTE) workforce employed by Social and Economic Equity (SEE)-Owned companies (397) is the most important factor. Given that all surveyed businesses in this sample are SEE-Owned, this indicates the policy's success in driving equity ownership and initial job creation.

Metric Category	Source	Value	Interpretation
Skills Gap (NYS Finance Law § 99-ii (3)(d)(iii) G))	**Lack of Qualified Candidates (Top Deficiency Rate%)**	**53.75%**	The percentage of all businesses surveyed (43 out of 80) identified a **lack of qualified candidates** as a top hiring challenge. This demonstrates the critical nature of the skills and training gap that must be addressed to support the sector's projected growth.

The MRTA Economic & Equity Monitor

This report provides the data structure and key visualization outputs, which focus on the NYS Finance Law § 99 ii (3)(d)(iii)(G) Economic Impact and the Social Equity mandate.

Final Summary of Data-Driven Imperatives

Imperative	Data Point	Conclusion
Growth Risk	**Future Hiring Index: 93.75% vs. Top Training Deficiency Rate: 53.75%**	The universal intent to hire is stifled by a critical lack of qualified candidates. The sector will fail to hit its job

		creation targets without immediate intervention.
Equity Vulnerability	**FTE SEE Workforce Rep: 49.63% vs. SEE Challenge Rate: 54.17%**	The success of the SEE mandate is critically important. Attention must be given to the skills gap, which is the largest single barrier affecting equity-owned businesses.
Management Challenges	**Accounting Gap: 41.67% | HR Gap: 14.71%**	Critical services essential for compliance and operations are absent from the Ancillary market, risking reliance on single, potentially anti-competitive providers.

END OF REPORT

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