



Ivoclar Warehouse Upgrade and Expansion

[Instructions and Insurance Requirements Document](#)

Section I: Applicant Background Information

Please answer all questions. Use "None" or "Not Applicable" where necessary. Information in this application may be subject to public review under New York State Law.

Applicant Information- Company Receiving Benefit

Project Name	Ivoclar Amherst Future Warehouse
Project Summary	Ivoclar is part of a global dental manufacturing company that is in need of an additional 20% warehouse capacity over the next 2 years due to expanding operations and increased shipments out of the Amherst facility. Global parent is analyzing where to deploy the capital to meet the additional demand.
Applicant Name	Ivoclar Vivadent
Applicant Address	175 Pineview Drive
Applicant Address 2	
Applicant City	Amherst
Applicant State	New York
Applicant Zip	14228
Phone	(716) 264-2181
Fax	
E-mail	jonathon.nyitrai@ivoclar.com
Website	Ivoclar.com
NAICS Code	339900

Business Organization

Type of Business

Corporation

Year Established

1986

State

New York

Indicate if your business is 51% or more (Check all boxes that apply)

[No] Minority Owned

[No] Woman Owned

Indicate Minority and/or Woman Owned Business Certification if applicable (Check all boxes that apply)

[No] NYS Certified

[No] Erie Country Certified

Individual Completing Application

Name Jonathon Nyitrai
Title Director of Logistics
Address 175 Pineview Drive
Address 2
City Amherst
State New York
Zip 14228
Phone (716) 264-2181
Fax
E-Mail jonathon.nyitrai@ivoclar.com

Company Contact- Authorized Signer for Applicant

Contact is same as individual completing application No
Name Glenn Hart
Title VP of Finance and Administration
Address 175 Pineview Drive
Address 2
City Amherst
State New York
Zip 14228
Phone (716) 264-2050
Fax
E-Mail glenn.hart@ivoclar.com

Company Counsel

Name of Attorney Thad McMurray
Firm Name Ivoclar VP General Counsel
Address 175 Pineview Drive
Address 2
City Amherst
State New York
Zip 14228
Phone (716) 264-2042
Fax
E-Mail thad.mcmurray@ivoclar.com

Benefits Requested (select all that apply).

Exemption from Sales Tax Yes
Exemption from Mortgage Tax No

Exemption from Real Property Tax No

Tax Exempt Financing* No

* (typically for not-for-profits & small qualified manufacturers)

Applicant Business Description

Describe in detail company background, history, products and customers. Description is critical in determining eligibility. Also list all stockholders, members, or partners with % ownership greater than 20%.

Ivoclar Vivadent, Inc. is located on Pineview Drive and is the North American headquarters for the Ivoclar Group, a global dental products company. This facility distributes dental products primarily to the US market, in addition to being a dental education facility which hosts many customers from the dental field thus bringing in hospitality revenue for local businesses. The Ivoclar Group, headquartered in Schaan, Liechtenstein, is one of the world's leading manufacturers of integrated solutions for high-quality dental applications. For over a century, the company has been shaping the dental industry, enabling people to achieve the best oral health and enjoy a beautiful smile. The company's success is based on a comprehensive portfolio of products, systems and services, strong research and development capabilities and a clear commitment to training and further education. The group of companies, which sells its products to around 130 countries, has 56 subsidiaries and branch offices and employs roughly 3,600 people worldwide. More information about the Ivoclar Group is available at ivoclar.com.

Estimated % of sales within Erie County 1 %

Estimated % of sales outside Erie County but within New York State 3 %

Estimated % of sales outside New York State but within the U.S. 89 %

Estimated % of sales outside the U.S. 7 %

(*Percentage to equal 100%)

For your operations, company and proposed project what percentage of your total annual supplies, raw materials and vendor services are purchased from firms in Erie County?

2

Describe vendors within Erie County for major purchases

1.8% of products and services purchased, over \$4 Million annually. Building improvements, Maintenance and repair contractors along with various Services of hotels and conference rooms. Meals and entertainment related to dental education provided by Ivoclar Vivadent, Inc.

Section II: Eligibility Questionnaire - Project Description & Details

Project Location

Address of Proposed Project Facility

175 Pineview Drive

Town/City/Village of Project Site

Amherst

School District of Project Site

Sweet Home Central

Current Address (if different)

Current Town/City/Village of Project Site (if different)

SBL Number(s) for proposed Project

40.08-4-4

What are the current real estate taxes on the proposed Project Site

109,713

If amount of current taxes is not available, provide assessed value for each.

Land

\$ 0

Building(s)

\$ 0

If available include a copy of current tax receipt.

Are Real Property Taxes current at project location?

Yes

If no please explain

Does the Applicant or any related entity currently hold fee title or have an option/contract to purchase the Project site?

Yes

If No, indicate name of present owner of the Project Site

Does Applicant or related entity have an option/contract to purchase the Project site?

No

Describe the present use of the proposed Project site (vacant land, existing building, etc.)

Ivoclar currently owns the property at 175 Pineview Drive.

Provide narrative and purpose of the proposed project (new build, renovations) square footage of existing and new construction contemplated and/or equipment purchases. Identify specific uses occurring within the project. Describe any and all tenants and any/all end users: (This information is critical in determining project eligibility)

The proposed project is a warehouse capacity expansion project at the Ivoclar Vivadent, Inc. Amherst location. Due to the future global distribution strategy, we require the need to store and distribute 20%- 35% more products over the next 10 years. Our current 98,000 square foot facility will not be able to accommodate the increased demand. With the proposed project, we would be able to process additional Dental Dealer orders that are currently processed in other Ivoclar Distribution Centers. Ivoclar would be able to invest more into the Amherst location in order to increase order processing for Laboratory and Dealer orders. The project does not include an expansion of the building footprint, however it includes capital deployment into new technologies which will increase capacity for storage and increase headcount for the distribution of our products.

Municipality or Municipalities of current operations

Town of Amherst

Will the Proposed Project be located within a Municipality identified above?

Yes

Will the completion of the Project result in the removal of an industrial or manufacturing plant of the project occupant from one area of the state to another area of the state OR in the abandonment of one or more plants or facilities of the project occupant located within the state?

No

If the Proposed Project is located in a different Municipality within New York State than that Municipality in which current operations are being undertaken, is it expected that any of the facilities in any other Municipality will be closed or be subject to reduced activity?

No

(If yes, you will need to complete the Intermunicipal Move Determination section of this application)

Is the project reasonably necessary to prevent the project occupant from moving out of New York State?

No

If yes, please explain and identify out-of-state locations investigated, type of assistance offered and provide supporting documentation available

Ivoclar investigated 3rd party logistics companies to store and distribute products, which would be located out of state.

Have you contacted or been contacted by other Local, State and/or Federal Economic Development Agencies?

No

If yes, please indicate the Agency and nature of inquiry below

If the Project could be undertaken without Financial Assistance provided by the Agency, then provide a statement in the space provided below indicating why the Project should be undertaken by the Agency:

Ivoclar Group is analyzing the deployment of capital related to its distribution strategy. Financial support provided by the Agency will help fund the project and improve the return on investment for the project in the Amherst location and expanding workforce within Amherst. The Agency assisting on this project will further cement Ivoclar's commitment to the area and allow us to further grow and expand in the future.

Describe the reasons why the Agency's financial assistance is necessary, and the effect the Project will have on the Applicant's business or operations. Focus on competitiveness issues, project shortfalls, etc... Your eligibility determination will be based in part on your answer (attach additional pages if necessary)

A sales tax exemption will help fund the project allowing us to continue to invest in the Ivoclar Amherst facility. As stated above, this project will allow us to procure new technologies which will enable us to increase storage and hire additional headcount from the local area to distribute more products.

Please confirm by checking the box, below, if there is likelihood that the Project would not be undertaken but for the Financial Assistance provided by the Agency

No

If the Applicant is unable to obtain Financial Assistance for the Project, what will be the impact on the Applicant and Erie County?

Continued investment in the Ivoclar Amherst location supports the long-term feasibility of Ivoclar's presence in Amherst, NY. The requested tax savings will allow Ivoclar to deploy capital into future Amherst projects. The project is anticipated to add jobs to our Amherst location.

Will project include leasing any equipment?

No

If yes, please describe equipment and lease terms.

Site Characteristics

Is your project located near public transportation?

Yes

If yes describe if site is accessible by either metro or bus line (provide route number for bus lines)

Metro Bus Stop at corner of Pineview and Commerce.

Has your local municipality and/or its planning board made a determination regarding the State Environmental Quality Review (SEQR) for your project?

No

Will the Project meet zoning/land use requirements at the proposed location?

Yes

For proposed facility please include the square footage for each of the uses outlined below

If applicant is paying for FFE for tenants, include in cost breakdown.

			Cost	% of Total Cost
Manufacturing/Processing	8,000 square feet	\$	0	0%
Warehouse	40,000 square feet	\$	0	0%
Research & Development	2,000 square feet	\$	0	0%
Commercial	square feet	\$	0	0%
Retail	square feet	\$	0	0%
Office	40,000 square feet	\$	0	0%
Specify Other	8,000 square feet	\$	0	0%

If you are undertaking new construction or renovations, are you seeking LEED certification from the US Green Building Council?

No

If you answered yes to question above, what level of LEED certification do you anticipate receiving? (Check applicable box)

<BLANK>

Provide estimate of additional construction cost as a result of LEED certification you are seeking < BLANK >

Will project result in significant utility infrastructure cost or uses No

What is the estimated project timetable (provide dates).

Start date : acquisition of equipment or construction of facilities

3/31/2025

End date : Estimated completion date of project

12/31/2026

Project occupancy : estimated starting date of occupancy

1/1/2027

Capital Project Plan / Budget

Estimated costs in connection with Project

1.) Land and/or Building Acquisition

\$ 0 square feet acres

2.) New Building Construction

\$ 0 square feet

3.) New Building addition(s)

\$ 0 square feet

4.) Reconstruction/Renovation

\$ 1,524,000 square feet

5.) Manufacturing Equipment

\$ 0

6.) Infrastructure Work

\$ 0

7.) Non-Manufacturing Equipment: (furniture, fixtures, etc.)

\$ 3,463,000

8.) Soft Costs: (Legal, architect, engineering, etc.)

\$ 1,609,000

9.) Other Cost

\$ 0

**Explain Other
Costs****Total Cost** \$ 6,596,000Construction Cost Breakdown:

Total Cost of Construction	\$ 1,524,000 (sum of 2, 3, 4 and 6 in Project Information, above)
Cost of materials	\$ 600,000
% sourced in Erie County	90%

Sales and Use Tax:

Gross amount of costs for goods and services that are subject to State and local sales and use tax- said amount to benefit from the Agency's sales and use tax exemption benefit \$ 6,100,000

Estimated State and local Sales and Use Tax Benefit (product of 8.75% multiplied by the figure, above): \$ 533,750

** Note that the estimate provided above will be provided to the New York State Department of Taxation and Finance. The Applicant acknowledges that the transaction documents may include a covenant by the Applicant to undertake the total amount of investment as proposed within this Application, and that the estimate, above, represents the maximum amount of sales and use tax benefit that the Agency may authorize with respect to this Application. The Agency may utilize the estimate, above, as well as the proposed total Project Costs as contained within this Application, to determine the Financial Assistance that will be offered.

Project refinancing estimated amount, if applicable (for refinancing of existing debt only) \$ 0

Have any of the above costs been paid or incurred as of the date of this Application? Yes

If Yes, describe particulars: Consultants and Architects studies

Sources of Funds for Project Costs:

Equity (excluding equity that is attributed to grants/tax credits): \$ 6,596,000

Bank Financing: \$ 0

Tax Exempt Bond Issuance (if applicable): \$ 0

Taxable Bond Issuance (if applicable): \$ 0

Public Sources (Include sum total of all state and federal grants and tax credits): \$ 0

Identify each state and federal grant/credit: (ie Historic Tax Credit, New Market Tax Credit, Brownfield, Cleanup Program, ESD, other public sources)

Total Sources of Funds for Project Costs: \$6,596,000

Have you secured financing for the project? No

Mortgage Recording Tax Exemption Benefit:

Amount of mortgage, if any that would be subject to mortgage recording tax:

Mortgage Amount (include sum total of construction/permanent/bridge financing).

Lender Name, if Known

Estimated Mortgage Recording Tax Exemption Benefit (product of mortgage amount as indicated above multiplied by 3/4 of 1%): \$0

Real Property Tax Benefit:

Identify and describe if the Project will utilize a real property tax exemption benefit other than the Agency's PILOT benefit (485-a, 485-b, other): N/A

IDA PILOT Benefit: Agency staff will indicate the estimated amount of PILOT Benefit based on estimated Project Costs as contained herein and anticipated tax rates and assessed valuation, including the annual PILOT Benefit abatement amount for each year of the PILOT benefit and the sum total of PILOT Benefit abatement amount for the term of the PILOT as depicted in the PILOT worksheet in the additional document section.

Percentage of Project Costs financed from Public Sector sources: Agency staff will calculate the percentage of Project Costs financed from Public Sector sources based upon the Sources of Funds for Project Costs as depicted above. The percentage of Project Costs financed from public sector sources will be depicted in the PILOT worksheet in the additional document section.

Is project necessary to expand project employment?

Yes

Is project necessary to retain existing employment?

Yes

Will project include leasing any equipment?

No

If yes, please describe equipment and lease terms.

Employment Plan (Specific to the proposed project location)

The Labor Market Area consists of the following six counties: Erie, Niagara, Chautauqua, Cattaraugus, Wyoming and Genessee.

By statute, Agency staff must project the number of FTE jobs that would be retained and created if the request for Financial Assistance is granted. Agency staff will project such jobs over the TWO Year time period following Project completion. Agency staff converts PT jobs into FTE jobs by dividing the number of PT jobs by two (2).

	Current # of jobs at proposed project location or to be relocated at project location	If financial assistance is granted – project the number of FT and PT jobs to be retained	If financial assistance is granted – project the number of FT and PT jobs to be created upon 24 months (2 years) after Project completion	Estimate number of residents of the Labor Market Area in which the project is located that will fill the FT and PT jobs to be created upon 24 months (2 years) after project completion **
Full time	179	179	6	6
Part time	5	5	0	0
Total	184	184	6	

If you estimated new job growth over the next 2 years, please provide a short description of how those estimates were calculated (i.e. jobs per square foot, new contracts/increased revenues, etc.)

Based increased distribution of products as well as anticipated personnel to manage distribution technology.

Salary and Fringe Benefits for Jobs to be Retained and Created

Job Categories	# of Full Time Employees retained and created	Average Salary for Full Time	Average Fringe Benefits for Full Time	# of Part Time Employees retained and created	Average Salary for Part Time	Average Fringe Benefits for Part Time
Management	58	\$ 136,003	\$ 31,281	0	\$ 0	\$ 0
Professional	17	\$ 95,647	\$ 21,999	0	\$ 0	\$ 0
Administrative	21	\$ 57,477	\$ 13,220	3	\$ 28,053	\$ 6,452
Production	0	\$ 0	\$ 0	0	\$ 0	\$ 0
Independent Contractor	0	\$ 0	\$ 0	0	\$ 0	\$ 0
Other	72	\$ 51,135	\$ 11,761	2	\$ 39,061	\$ 8,984
Total	168			5		

** Note that the Agency may utilize the foregoing employment projections, among other items, to determine the financial assistance that will be offered by the Agency to the Applicant. The Applicant acknowledges that the transaction documents may include a covenant by the Applicant to retain the number of jobs and create the number of jobs with respect to the Project as set forth in this Application.

Yes **By checking this box, I certify that the above information concerning the current number of jobs at the proposed project location or to be relocated to the proposed project location is true and correct.**

Employment at other locations in Erie County: (provide address and number of employees at each location):

Address	Home Offices for Erie County Sales Representatives	
Full time	2	0
Part time	0	0
Total	2	0

Payroll Information

Annual Payroll at Proposed Project Site upon completion

13,932,000

Estimated average annual salary of jobs to be retained (Full Time)

88,835

Estimated average annual salary of jobs to be retained (Part Time)

32,456

Estimated average annual salary of jobs to be created (Full Time)

49,667

Estimated average annual salary of jobs to be created (Part Time)

0

Estimated salary range of jobs to be created

From (Full Time)	39,500	To (Full Time)	80,000
From (Part Time)	0	To (Part Time)	0

Section III: Facility Type - Single or Multi Tenant

Is this a Single Use Facility or a Multi-Tenant Facility?

Single Use Facility

For Single Use Facility.

Occupant Name Ivoclar
Address 175 Pineview Drive
Contact Person Thad McMurray
Phone (716) 264-2042
Fax
E-Mail thad.mcmurray@ivoclar.com
Federal ID # 16-1287874
SIC/NAICS Code 339900

SS

Section V: Retail Determination

To ensure compliance with Section 862 of the New York General Municipal Law, the Agency requires additional information if the proposed Project is one where customers personally visit the Project site to undertake either a retail sale transaction or to purchase services.

Please answer the following:

Will any portion of the project (including that portion of the costs to be financed from equity or other sources) consist of facilities or property that are or will be primarily used in making sales of goods or services to customers who personally visit the project site?

No

If yes, complete the Retail Questionnaire Supplement below. **If no, proceed to the next section.**

Section VI: Adaptive Reuse Projects

Adaptive Reuse is the process of adapting old structures or sites for new purposes.

Are you applying for tax incentives under the Adaptive Reuse Program?

No

Section VII: Inter-Municipal Move Determination

The Agency is required by state law to make a determination that, if completion of a Project benefiting from Agency Financial Assistance results in the removal of an industrial or manufacturing plant of the project occupant from one area of the state to another area of the state or in the abandonment of one or more plants or facilities of the project occupant located within the state, Agency financial Assistance is required to prevent the project occupant from relocating out of the state, or is reasonably necessary to preserve the project occupant's competitive position in its respective industry.

Current Address

City/Town

State

Zip Code

Will the project result in the removal of an industrial or manufacturing plant of the Project occupant from one area of the state to another area of the state?

No

Will the project result in the abandonment of one or more plants or facilities of the Project occupant located within the state?

No

If Yes to either question, explain how, notwithstanding the aforementioned closing or activity reduction, the Agency's Financial Assistance is required to prevent the Project from relocating out of the State, or is reasonably necessary to preserve the Project occupant's competitive position in its respective industry:

Does this project involve relocation or consolidation of a project occupant from another municipality?

Within New York State

No

Within Erie County

No

If Yes to either question, please, explain

Will the project result in a relocation of an existing business operation from the City of Buffalo?

No

If yes, please explain the factors which require the project occupant to relocate out of the City of Buffalo (For example, present site is not large enough, or owner will not renew leases etc.)

What are some of the key requirements the project occupant is looking for in a new site? (For example, minimum sq. ft., 12 foot ceilings, truck loading docs etc.)

If the project occupant is currently located in Erie County and will be moving to a different municipality within Erie County, has the project occupant attempted to find a suitable location within the municipality in which it is currently located?

No

What factors have lead the project occupant to consider remaining or locating in Erie County?

If the current facility is to be abandoned, what is going to happen to the current facility that project occupant is located in?

Please provide a list of properties considered, and the reason they were not adequate. (Some examples include: site not large enough, layout was not appropriate, did not have adequate utility service, etc.) Please include full address for locations.

Section VIII: Senior Housing

IDA tax incentives may be granted to projects under the Agency's Senior Citizen Rental Housing policy when the project consists of a multi-family housing structure where at least 90% of the units are (or are intended to be) rented to and occupied by a person who is 60 years of age or older.

Are you applying for tax incentives under the Senior Rental Housing policy?

No

Section IX: Tax Exempt Bonds

In order to receive the benefits of a tax-exempt interest rate bond, private borrowers and their projects must be eligible under one of the federally recognized private active bond categories (Fed Internal Rev Code IRC sections 142-144, and 1394).

Are you applying for tax exempt bonds / refinancing of bonds related to a residential rental facility project?

No