

# Outdoor Recreation Manufacturing Market Profile

## Overview

Outdoor Recreation Manufacturing includes three specific subsectors:

- ◆ 336612 Boat Building - This U.S. industry comprises establishments primarily engaged in building boats. Boats are defined as watercraft not built in shipyards and typically of the type suitable or intended for personal use. Included in this industry are establishments that manufacture heavy-duty inflatable rubber or inflatable plastic boats. Examples of products include dinghy (except inflatable rubber), inflatable plastic boats, inflatable rubber boats, motorboats (inboard or outboard), rowboats, sailboats, and yachts.
- ◆ 336991 Motorcycle, Bicycle, and Parts Manufacturing - This U.S. industry comprises establishments primarily engaged in manufacturing motorcycles, bicycles, tricycles and similar equipment, and parts.
- ◆ 339920 Sporting and Athletic Goods Manufacturing - This industry comprises establishments primarily engaged in manufacturing sporting and athletic goods (except apparel and footwear). *Source: [www.census.gov/cos/www/naics/](http://www.census.gov/cos/www/naics/)*

### National Industry Trends

Between 2014 and 2019, revenue for this sector grew at an annual rate of 1.3%. The sector has a positive economic outlook over the next five years from 2019 to 2024. Industry revenue is projected to grow at an annualized rate of 1.2% with marketing and niche market opportunities driving that growth. Nationally, this sector has experienced a rise in consumer demand due to the COVID-19 pandemic, where consumer enthusiasm for outdoor activities increased drastically.

Looking forward to 2024, the number of industry operators are likely to remain stagnant. External competition is expected to remain a challenge for operators, forcing underperforming establishments to close. E-commerce giants such as Amazon also pose as competition for Outdoor Recreation Manufactures as they offer a wide range of products at low prices. Operators that are able to develop brand loyalty

with consumers can alleviate threats from competition. Offering manufacturing discounts and store demonstrations help to encourage consumers to purchase from the source and avoid large third party e-commerce players. For small operators to remain competitive, they must have diversified offerings or a specialized area of expertise.

Industry operators have capitalized on new technology, such as ordering software. Online outreach and marketing campaigns can help to bolster sales and build brand loyalty at a minimal cost. This has enabled total wages to increase at a rate of 1.3% annually from 2014 to 2019. *Source: IBISWorld*

### Key Industry Drivers

The following are key factors that drive the industry market (IBIS):

- ◆ Total recreation expenditure
- ◆ Participation in sports
- ◆ Per capita disposable income
- ◆ Online Marketing

Health-conscious Americans are the primary consumers of the Outdoor Recreation Manufacturing sector. These individuals are expected to spend more time participating in outdoor recreation creating a boost in demand. This, combined with increasing disposable incomes and total recreational expenditure, is driving growth.

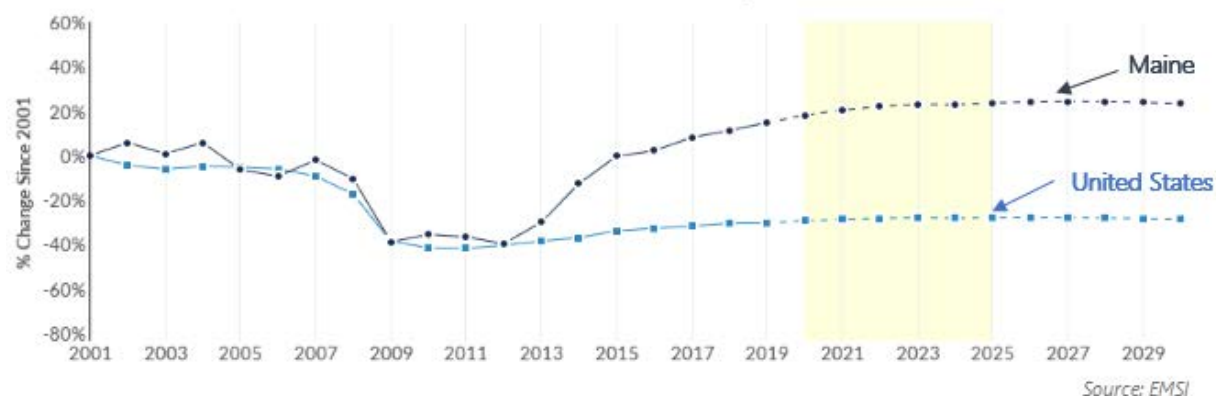
### National Performance

The Outdoor Recreation Manufacturing industry consisted of 3,539 payrolled businesses in the US employing a total of 107,020 workers

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<sup>1</sup> Location quotient (LQ) is a method of quantifying how concentrated a particular industry is in a region as compared to the nation. It can reveal what makes a particular region “unique” in comparison to the national average. An LQ of 1 indicates that a particular industry represents the

Outdoor Recreation Manufacturing Jobs, 2001 - 2029



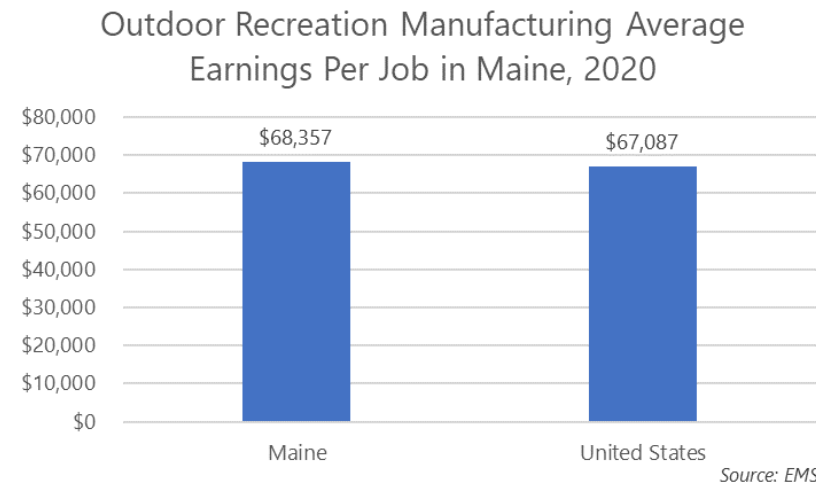
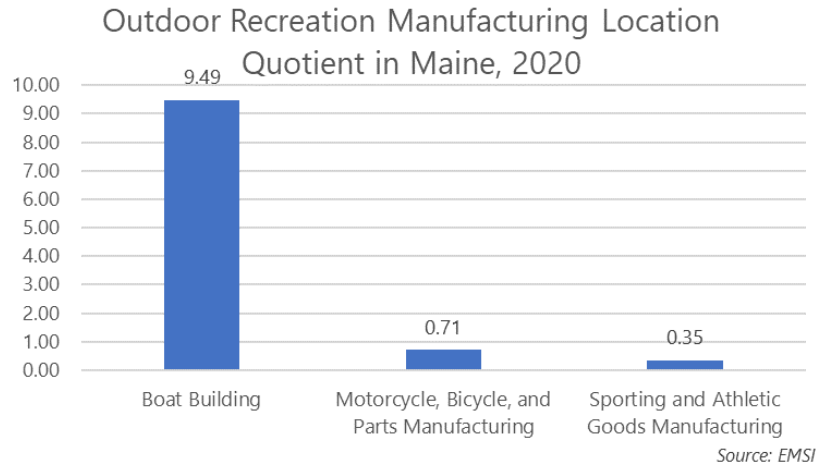
with average annual earnings of \$67,087. Between 2015 and 2020, employment grew 7% and is projected to grow by 6% between 2020 and 2025. From 2015 to 2020, Outdoor Recreation Manufacturing business locations grew from 3,456 to 3,539 for a growth of 2%. In 2019, sales in Outdoor Recreation Manufacturing totaled \$29.7 billion in the US. Of these sales, \$25.6 billion (86%) were domestic sales (made to entities in the US) and \$4.1 billion (14%) were exports (made to entities outside of the US). *Source: EMSI*

### Maine Performance

As of 2020, there are 86 Outdoor Recreation Manufacturing payrolled businesses in Maine employing a total of 1,992 workers with average annual earnings of \$68,357. Between 2015 and 2020 employment grew 14% and is projected to grow 5% between 2020 and 2025. During that time, payrolled business locations in Maine remained stagnant at 86. In terms of industry concentration<sup>1</sup>, Boat Building in Maine is the most concentrated with a location quotient of 9.49 while Motorcycle, Bicycle, and Parts Manufacturing has an LQ of 0.71, and Sporting and Athletic

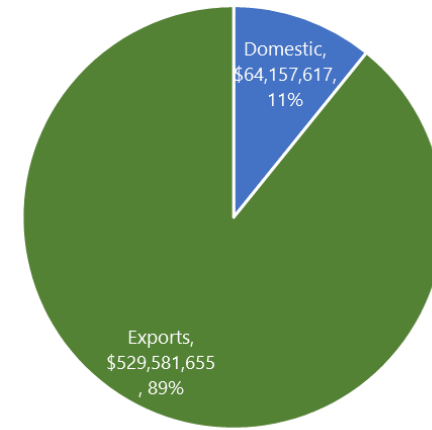
same share of jobs locally as it does nationally, i.e. is equally concentrated. An LQ greater than 1 indicates a higher-than-average level of concentration, while an LQ less than 1 indicates a lower-than-average level of concentration.

Goods Manufacturing is the least concentrated with an LQ of 0.35.  
 Source: EMSI



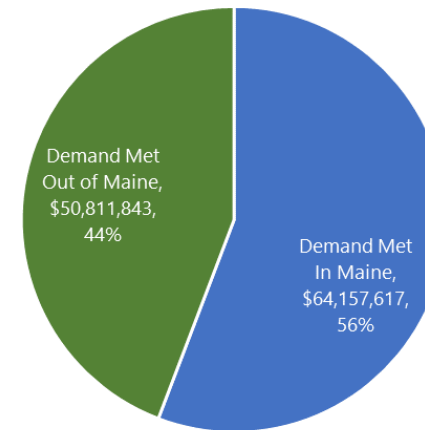
2019 sales in Outdoor Recreation Manufacturing in Maine totaled \$539.7 million of which an estimated \$64.2 million (11%) were domestic sales (made to entities in Maine) and \$529.6 million (89%) were exports (made to entities outside of Maine).

Total Outdoor Recreation Sales in Maine, 2019



In total in 2019, entities in Maine purchased \$115.0 million in Outdoor Recreation goods and services, \$64.2 million (56%) of which were purchased from businesses in the state and \$50.8 million (44%) were purchased from businesses located out of the state. Source: EMSI

Total Outdoor Recreation Demand in Maine, 2019



## Supply Chain & Domestic Trade

### Key Buying Industries (IBISWorld)

- ◆ 1st Tier
  - Consumers in the US

### Key Selling Industries (IBISWorld)

- ◆ 1st Tier
  - Athletic & Sporting Goods Manufacturing in the US
  - Sporting Goods Wholesaling in the US
  - Toy & Craft Supplies Wholesaling in the US
- ◆ 2nd Tier
  - Men's & Boys' Apparel Wholesaling in the US
  - Women's & Children's Apparel Wholesaling in the US
  - Footwear Wholesaling in the US

The following tables display the industries that Outdoor Recreation Manufacturing is selling to and buying from in the United States and Maine. The top industries that Outdoor Recreation Manufacturing in the United States purchases from are Ship Building and Repairing with nearly \$247.4 million in purchases followed by Motorcycle, Bicycle, and Parts Manufacturing (\$224.5 million) and Other Personal and Household Goods Repair and Maintenance (\$187.8 million). Top industries Outdoor Recreation Manufacturing sells to in the United States include Corporate, Subsidiary, and Regional Managing Offices (\$739.6 million), Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (\$631.7 million), and Plastics Material and Resin Manufacturing (\$425.3 million).

Top Industries Selling to Outdoor Recreation Manufacturing in Maine, 2020		
NAICS	Sales to	Total In-Region Sales
336611	Ship Building and Repairing	\$12,048,470
336612	Boat Building	\$6,676,013
336991	Motorcycle, Bicycle, and Parts Manufacturing	\$353,814
901200	Federal Government, Military	\$229,633
901199	Federal Government, Civilian, Excluding Postal Service	\$180,781
811490	Other Personal and Household Goods Repair and Maintenance	\$171,589
441110	New Car Dealers	\$155,020
622110	General Medical and Surgical Hospitals	\$96,451
312112	Bottled Water Manufacturing	\$85,776
902999	State Government, Excluding Education and Hospitals	\$74,380
531110	Lessors of Residential Buildings and Dwellings	\$70,462
722511	Full-Service Restaurants	\$68,575
322121	Paper (except Newsprint) Mills	\$65,835
531210	Offices of Real Estate Agents and Brokers	\$62,814
621111	Offices of Physicians (except Mental Health Specialists)	\$62,201
722513	Limited-Service Restaurants	\$61,014
316210	Footwear Manufacturing	\$59,382
721110	Hotels (except Casino Hotels) and Motels	\$57,201
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$56,073
454310	Fuel Dealers	\$55,359

Source: EMSI

Top Industries Outdoor Recreation Manufacturing is Purchasing from in the United States, 2020		
NAICS	Purchases from	Total Purchases
336611	Ship Building and Repairing	\$247,351,490
336991	Motorcycle, Bicycle, and Parts Manufacturing	\$224,456,317
811490	Other Personal and Household Goods Repair and Maintenance	\$187,820,106
339920	Sporting and Athletic Goods Manufacturing	\$163,741,426
336612	Boat Building	\$146,931,346
901200	Federal Government, Military	\$108,701,109
441110	New Car Dealers	\$102,844,455
903999	Local Government, Excluding Education and Hospitals	\$86,918,439
902999	State Government, Excluding Education and Hospitals	\$82,064,464
901199	Federal Government, Civilian, Excluding Postal Service	\$47,704,804
811412	Appliance Repair and Maintenance	\$45,606,171
722513	Limited-Service Restaurants	\$34,374,595
531110	Lessors of Residential Buildings and Dwellings	\$31,812,147
811420	Reupholstery and Furniture Repair	\$26,342,711
531210	Offices of Real Estate Agents and Brokers	\$24,548,613
611310	Colleges, Universities, and Professional Schools	\$21,826,685
611110	Elementary and Secondary Schools	\$21,154,971
441120	Used Car Dealers	\$20,516,465
441310	Automotive Parts and Accessories Stores	\$20,363,627
622110	General Medical and Surgical Hospitals	\$19,664,872

Source: EMSI

Top Industries Selling to Outdoor Recreation Manufacturing in the United States, 2020		
NAICS	Sales to	Total In-Region Sales
551114	Corporate, Subsidiary, and Regional Managing Offices	\$739,620,855
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	\$631,730,507
325211	Plastics Material and Resin Manufacturing	\$425,251,784
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$419,111,743
333618	Other Engine Equipment Manufacturing	\$309,751,449
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$302,178,801
331318	Other Aluminum Rolling, Drawing, and Extruding	\$296,652,350
336390	Other Motor Vehicle Parts Manufacturing	\$277,003,218
331315	Aluminum Sheet, Plate, and Foil Manufacturing	\$252,933,288
336991	Motorcycle, Bicycle, and Parts Manufacturing	\$223,677,867
441110	New Car Dealers	\$213,726,543
524210	Insurance Agencies and Brokerages	\$176,792,090
519130	Internet Publishing and Broadcasting and Web Search Portals	\$174,491,583
339920	Sporting and Athletic Goods Manufacturing	\$164,553,765
325510	Paint and Coating Manufacturing	\$156,585,688
541990	All Other Professional, Scientific, and Technical Services	\$155,381,114
322211	Corrugated and Solid Fiber Box Manufacturing	\$154,837,869
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	\$154,574,451
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	\$152,046,254
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$147,504,806

Source: EMSI

In Maine, the Outdoor Recreation Manufacturing sector purchases over \$28.8 million from Motor Vehicle Gasoline Engine and Engine Parts Manufacturing with 5% of those purchases coming from within Maine while 95% is imported from other states. In total Maine and the United States share two of the top twenty purchasing industries for Outdoor Recreation Manufacturing.

Maine's Outdoor Recreation Manufacturing sector sells to Ship Building and Repairing (\$412.0 million), Boat Building (\$6.7 million), and Motorcycle, Bicycle, and Parts Manufacturing (\$353,000). Of the top twenty industries that Outdoor Recreation Manufacturing is selling to, Maine and the United States share twelve in common. *Source: EMSI*

Top Industries Outdoor Recreation Manufacturing is Purchasing from in Maine, 2020						
NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	\$1,499,828	5.2%	\$27,335,066	94.8%	\$28,834,895
551114	Corporate, Subsidiary, and Regional Managing Offices	\$2,096,537	12.4%	\$14,763,885	87.6%	\$16,860,421
333618	Other Engine Equipment Manufacturing	\$0	0.0%	\$14,138,387	100.0%	\$14,138,387
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$0	0.0%	\$13,792,739	100.0%	\$13,792,739
336390	Other Motor Vehicle Parts Manufacturing	\$761,061	7.0%	\$10,088,657	93.0%	\$10,849,719
325211	Plastics Material and Resin Manufacturing	\$151,777	1.6%	\$9,532,812	98.4%	\$9,684,589
441110	New Car Dealers	\$4,146,908	44.8%	\$5,101,535	55.2%	\$9,248,443
336612	Boat Building	\$6,673,957	100.0%	\$789	0.0%	\$6,674,746
331318	Other Aluminum Rolling, Drawing, and Extruding	\$0	0.0%	\$6,168,078	100.0%	\$6,168,078
332510	Hardware Manufacturing	\$1,020,374	18.9%	\$4,376,251	81.1%	\$5,396,625
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	\$560,426	10.6%	\$4,706,540	89.4%	\$5,266,966
524210	Insurance Agencies and Brokerages	\$4,747,214	90.3%	\$510,270	9.7%	\$5,257,484
331315	Aluminum Sheet, Plate, and Foil Manufacturing	\$0	0.0%	\$5,251,816	100.0%	\$5,251,816
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	\$574,046	13.0%	\$3,836,566	87.0%	\$4,410,612
524126	Direct Property and Casualty Insurance Carriers	\$767,500	19.5%	\$3,159,170	80.5%	\$3,926,670
423830	Industrial Machinery and Equipment Merchant Wholesalers	\$977,189	27.1%	\$2,623,120	72.9%	\$3,600,309
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$152,609	4.4%	\$3,310,746	95.6%	\$3,463,355
524114	Direct Health and Medical Insurance Carriers	\$1,257,261	40.6%	\$1,838,328	59.4%	\$3,095,589
325510	Paint and Coating Manufacturing	\$29,264	1.0%	\$3,000,165	99.0%	\$3,029,430
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	\$183,365	6.3%	\$2,723,443	93.7%	\$2,906,808

Source: EMSI

## Demand by State

The top ten states by total demand for Outdoor Recreation Manufacturing are listed in the table to the right. California has the greatest demand at nearly \$3.5 billion, followed by Texas (\$2.1 billion), and New York (\$1.8 billion).

Outdoor Recreation Manufacturing Top Ten States by Total Demand, 2015 - 2020						
Region	Payrolled Business Locations	Demand met in-region	% Demand met in-region	Demand met by imports	% Demand met by imports	Total Demand
California	478	\$1,828,001,684	52.9%	\$1,626,349,945	47.1%	\$3,454,351,630
Texas	183	\$607,600,600	28.9%	\$1,498,149,126	71.1%	\$2,105,749,727
New York	80	\$210,076,502	11.6%	\$1,608,069,136	88.4%	\$1,818,145,638
Florida	465	\$862,940,380	57.8%	\$628,888,608	42.2%	\$1,491,828,988
Pennsylvania	75	\$250,774,039	24.2%	\$787,172,789	75.8%	\$1,037,946,829
Illinois	101	\$411,035,496	40.5%	\$603,518,045	59.5%	\$1,014,553,541
New Jersey	38	\$149,196,958	17.3%	\$711,498,723	82.7%	\$860,695,681
Ohio	57	\$175,261,111	21.3%	\$647,810,674	78.7%	\$823,071,785
Virginia	46	\$93,325,965	12.5%	\$652,643,087	87.5%	\$745,969,052
Massachusetts	56	\$325,138,881	45.8%	\$384,846,740	54.2%	\$709,985,621

Source: EMSI

The table to the right displays the top ten states by percent of imports for Outdoor Recreation Manufacturing. New Mexico is the top importer by percentage with 98.8% of its Outdoor Recreation Manufacturing demand being met by imports with only 0.2% of its demand for the sector being produced within the state. Other states with a high percentage of imports include West Virginia (98.3%) and North Dakota (97.3%). Source: EMSI

Outdoor Recreation Manufacturing Top Ten States by Percent of Imports, 2015 - 2020						
Region	Payrolled Business Locations	Demand met in-region	% Demand met in-region	Demand met by imports	% Demand met by imports	Total Demand
New Mexico	6	\$1,475,119	1.2%	\$122,825,160	98.8%	\$124,300,280
West Virginia	5	\$1,767,699	1.7%	\$104,678,349	98.3%	\$106,446,049
North Dakota	5	\$1,680,051	2.7%	\$61,356,371	97.3%	\$63,036,421
South Dakota	5	\$2,162,779	3.4%	\$61,339,722	96.6%	\$63,502,501
Delaware	3	\$3,202,856	4.2%	\$73,067,137	95.8%	\$76,269,994
Wyoming	5	\$2,646,927	5.8%	\$43,129,815	94.2%	\$45,776,742
Maryland	33	\$37,056,684	6.9%	\$501,969,247	93.1%	\$539,025,931
New York	80	\$210,076,502	11.6%	\$1,608,069,136	88.4%	\$1,818,145,638
Virginia	46	\$93,325,965	12.5%	\$652,643,087	87.5%	\$745,969,052
Connecticut	32	\$52,285,849	13.3%	\$339,981,215	86.7%	\$392,267,064

Source: EMSI

## Sales and Exports

The table to the right displays the sales and exports for Outdoor Recreation Manufacturing according to US Census data. Census foreign trade data is broken down at the four-digit NAICS level and includes NAICS 3366 Ships & Boats and therefore differs from EMSI data described above. Outdoor Recreation Manufacturing in Maine has total sales of \$593.7 million of which \$529.6 million are exported out of state for a total of 89%. According to the US Census, Outdoor Recreation Manufacturing in Maine has a foreign export value of \$8.1 million. The foreign export value as a percent of total sales in Maine is 1.4%, being less valued than the national percentage of total sales at 10.7%.

Top exports by value for Maine's Outdoor Recreation Manufacturing sector are displayed in the table to the right by US Census commodity<sup>2</sup> code. In Maine, the top foreign export in Outdoor Recreation Manufacturing is Boat/dock fenders which accounts for \$8.0 million in exports for a total of 91.9% of the total exports in Outdoor Recreation Manufacturing in Maine. Altogether, foreign exports in Outdoor Recreation Manufacturing account for 0.2% of Maine's exports.

Outdoor Recreation Manufacturing Sales and Exports, 2019					
	Total Sales	Sales Exported Out of State	Percent of Sales Exported out of State	Foreign Export Value*	Export Value Percent of Total Sales*
Maine	\$ 593,739,272	\$ 529,581,655	89.0%	\$ 8,132,579	1.4%
United States	\$ 29,710,555,483			\$ 3,192,323,138	10.7%

\*Note: Includes NAICS 3366 Ships & Boats

Source: EMSI, US Census

Top Exports by Value for Maine Outdoor Recreation Manufacturing, 2019			
	Foreign Export	Foreign Export Percent of Total Outdoor Recreation Manufacturing Exports	Foreign Export Percent of Total Exports in All Sectors
401694 Boat/dock Fender, Inflatable/nt, Of Vulcanized Rub	\$ 7,973,391	91.9%	0.1%
640319 Footwear Lea Upper, Sports Footwear Exc Ski-boots	\$ 511,414	5.9%	0.0%
890200 Fishing Vessels;factory Ships & Shps,ves, Nesoi	\$ 188,178	2.2%	0.0%
650610 Safety(incl Sports)hdgr,whether/not Lined/trimmed	\$ 3,537	0.0%	0.0%
Total	\$ 8,676,520	100.0%	0.2%

Source: US Census

<sup>2</sup> The import statistics are initially collected and compiled in terms of approximately 18,000 10-digit commodity codes in the Harmonized Tariff Schedule of the United States Annotated (HTSA). The HTSA is maintained

by the U.S. International Trade Commission and is based on the 2-, 4-, and 6-digit headings and subheadings of the international Harmonized System (HS).



## Demand and Imports

Outdoor Recreation Manufacturing in Maine has a total demand of \$115.0 million of which \$50.8 million is met out of state (44.0%). According to the US Census, foreign import value is estimated at \$18.5 million for the sector. Foreign import value as a percent of total demand is 69.5% for Maine, ranking higher than the national average of 40.5%.

Top imports by value are displayed to the right by commodity code. Footwear ranks as the highest commodity by import with \$1.8 million accounting for 72.0% of imports for the sector. Considering all sectors within the State of Maine, Outdoor Recreation Manufacturing is negligible in terms of foreign imports.

Outdoor Recreation Manufacturing Demand and Imports, 2019					
	Total Demand	Demand Met out of State	Percent of Demand Met out of State	Foreign Import Value*	Foreign Import Value Percent of Total Demand*
Maine	\$ 114,969,461	\$ 50,811,843	44.0%	\$ 18,522,030	69.5%
United States	\$ 25,585,167,594			\$ 2,169,232,901	40.5%

\*Note: Includes NAICS 3366 Ships & Boats

Source: EMSI, US Census

Top Imports by Value for Maine Outdoor Recreation Manufacturing, 2019			
	Foreign Import	Foreign Import Percent of Total Outdoor Recreation Manufacturing Imports	Foreign Import Percent of Total Imports in All Sectors
640411 Footwear Tex Up Rubplas Sol Sport Shoes	\$ 1,771,244	72.0%	0.0%
420321 Gloves, Mittens & Mitts For Sports, Leath Etc	\$ 306,600	12.5%	0.0%
640319 Footwear Lea Upper, Sports Footwear Exc Ski-boots	\$ 121,970	5.0%	0.0%
650610 Safety(incl Sports)hdgr,whether/not Lined/trimmed	\$ 95,713	3.9%	0.0%
401695 Inflatable Articles, Exc Boat/dock Fender, Nesoi	\$ 67,528	2.7%	0.0%
890310 Inflatable Yachts, Vessels, For Ples, Sports	\$ 59,058	2.4%	0.0%
640219 Footwear Rub Plast Stitch Sports Footwear Nesoi	\$ 19,885	0.8%	0.0%
401694 Boat/dock Fender, Inflatable/nt, Of Vulcanized Rub	\$ 16,667	0.7%	0.0%
Total	\$ 2,458,665	100.0%	0.0%

Source: US Census

## Outdoor Recreation Value Added

The US Bureau of Economic Analysis (BEA) has created a specialized analysis of outdoor recreation that examine the value added, employment, and compensation. The following data is based on their analysis. *Please note that BEA's outdoor recreation includes manufacturing, consumer outdoor recreation, and recreation services rather than examining outdoor recreation manufacturing on its own.*

Outdoor recreation in Maine represented 4.8% of total value added for all sectors compared to 2.2% nationally.

Outdoor Recreation Value Added, Employment, and Compensation as a Percent of Total (2017)		
	Maine	United States
Total Outdoor Recreation Value Added (Thousands of Dollars)	\$ 2,957,847	\$ 427,189,444
Percent of Total Value Added*	4.8%	2.2%
Total Outdoor Recreation Employment	40,720	5,170,670
% of Total Employment*	6.4%	3.4%
Total Outdoor Recreation Compensation (Thousands of Dollars)	\$ 1,373,098	\$ 213,440,905
Percent of Total Compensation*	3.8%	2.1%

Source: U.S. Bureau of Economic Analysis

\*Based on state level data published on bea.gov, GDP estimates were published on May 1, 2019, compensation estimates were published on March 26, 2019 and employment estimates were published on September 25, 2018.

In Maine, manufacturing accounts for \$328 million of the total outdoor recreation industries. Manufacturing represents 11% of the total outdoor recreation value add for Maine compared to 12% in the United States.

Outdoor Recreation Value Added, Selected Industries, Thousands of Dollars (2017)		
	Maine	United States
Total Outdoor Recreation Industries	\$ 2,957,847	\$427,189,444
Private industries	\$ 2,867,990	\$401,263,550
Manufacturing	\$ 328,022	\$ 51,667,166
Retail trade	\$ 610,533	\$ 95,660,596
Finance, insurance, real estate, rental, and leasing	\$ 401,661	\$ 24,599,990
Arts, entertainment, and recreation	\$ 228,192	\$ 52,879,893
Accommodations and food service	\$ 986,874	\$ 59,990,341
All other private industries	\$ 312,709	\$116,465,567
Government	\$ 89,857	\$ 25,925,894

Source: U.S. Bureau of Economic Analysis

## Establishment Locations in the US

IBISWorld data is used to understand establishment location trends for Outdoor Recreation Manufacturing. IBISWorld breaks down Outdoor Recreation Manufacturing into Outdoor Equipment Stores. Outdoor Equipment Stores establishments are driven by proximity to consumers and demand levels with areas with the highest population concentration having a greater concentration of establishments. As of 2020, there are 6,835 businesses throughout the United States. Of those establishments, 23.9% are located in the Southeast, 17.5% in the West, 7.2% in the Plains, 6.4% in New England. The New England Region has a higher establishment share compared to its population share at 6.4% and 4.6%, respectively. *Source: IBISWorld*

Outdoor Recreation in the United States, 2020				
	Revenue (\$ Millions)	Businesses	Annual Growth in Revenue 2014 - 2019	Annual Growth in Revenue 2019 - 2024
Outdoor Equipment Stores	\$ 8,243	6,835	1.3%	1.2%

Source: IBISWorld

## Foreign Exports & Imports

Foreign exports and imports are not available through IBISWorld for Outdoor Equipment Stores.

## Maine Assets

Business associations within Maine are doing great work to advance outdoor recreation opportunities within the state. Key assets include:

- ◆ Maine Outdoor Brands <https://maineoutdoorbrands.com/>
- ◆ Maine Made <https://www.mainemade.com/>
- ◆ Manufacturers Association of Maine <https://mainemfg.com/>
- ◆ Office of Outdoor Recreation <https://www.maine.gov/decd/programs/maine-office-of-outdoor-recreation>

Outdoor Recreation Manufacturers in Maine include Johnson Outdoors Watercraft, Lyman Morse Boatbuilding Company, and Sabre Yachts.

### **National Resources**

- ◆ Society of Outdoor Recreation Professionals <https://www.recpro.org>
- ◆ Outdoor Industry Association <https://outdoorindustry.org/>

### **Key Tactics for Supporting Maine Growth**

Maine's Department of Economic and Community Development Domestic Trade webpage highlights several key trade shows for Maine Outdoor Recreation Manufacturing businesses interested in developing their products, customer bases, and networks.

## **Data Sources**

### **Economic Modeling Specialists International (EMSI)**

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

### **IBISWorld**

IBISWorld is one of the world's leading publishers of business intelligence, specializing in industry and procurement research. Through its detailed industry reports available at 5-digit NAICS level,

IBISWorld provides insight into market conditions for targeted industries, helps to identify major suppliers or supply chain, and provides an understanding of competitor activity. More at [www.ibisworld.com](http://www.ibisworld.com)