The State of Food & Beverage Processing in Maine

2025

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camoin associates

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Report Objectives

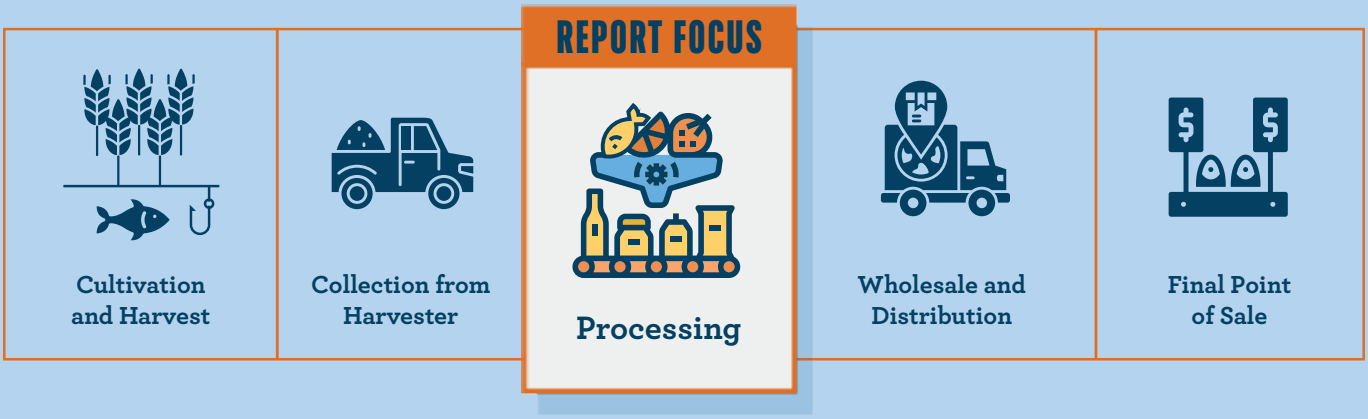
This assessment[1] provides a comprehensive analysis of the food and beverage processing sector in Maine and in the wider New England economy. This report specifically focuses on the manufacturing and value-added production of food products and the infrastructure needed to support food processing. It is important to clarify that this report does not encompass cultivation or harvesting in the agricultural or fishing sectors, nor does it focus on the distribution or end-user consumption of food products. Instead, it zeroes in on the processing activities that add value to raw food products.

The primary objectives of this assessment are to identify the strengths, weaknesses, and opportunities within Maine's food processing sector. By highlighting these areas, the report aims to provide insights that can help improve production efficiencies and help Maine producers leverage the state's existing strengths to compete more effectively in the broader New England market and beyond. This report is organized into four types of analyses that informed strategic priority areas for the Food Processing sector:

- Regional Baseline Assessment (New England)
- Infrastructure Mapping and Real Estate Market Analysis
- Collaborative Model Case Studies
- Organizational and Business Engagement

Key components of the Food Supply Chain:

The figure below demonstrates the typical activities that take place within the food supply chain, with all components interacting within the food economy environment. This report focuses on the middle of the supply chain, where food is processed.



[1] *This project is commissioned by the Office of Business Development and is funded by the Maine Jobs & Recovery Plan.*

Regional Baseline Assessment

The table on the next page provides an overview of the Food and Beverage Processing industry across New England, highlighting state-specific strengths and unique opportunities. The Regional Baseline Assessment covers employment growth, gross regional product (GRP) per worker[2] , sector competitiveness[3] , and concentration[4] in top subsectors across **Maine, Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont**. This regional assessment highlights Maine's strengths and competitive positioning within New England's thriving food sector, informing recommendations to enhance Maine's role and integration in the regional food economy.

State-Level Strengths and Highlights

- **Maine** boasts the second-highest sector concentration in New England, led by Beverage Manufacturing and seafood processing, with opportunities to increase productivity in higher-value subsectors.
- **Massachusetts** has the largest share of employment in New England's food sector, with a high concentration in seafood processing, though growth has been moderate compared to other states.
- **Connecticut** shows strong growth in 'Other Food Manufacturing' and a competitive effect that suggests substantial regional advantages, especially in snack foods and ice cream production.
- **Vermont** leads in dairy product manufacturing and has the highest sector concentration, though growth has been slower than in other states. Its strong specialization in high-value-added food products drives GRP per worker.
- **Rhode Island** saw the fastest sector growth in New England, largely driven by a surge in Animal Slaughtering and Processing, with significant competitive advantages enhancing employment.
- **New Hampshire** has one of the highest GRPs per worker due to its focus on Beverage and Confectionery Manufacturing, alongside high growth in animal food production and processing.

Each New England state presents unique subsector strengths, competitive advantages, and growth areas that contribute to the regional food economy's diversity. Investments in high-GRP subsectors, like Beverage and Dairy Manufacturing, and expansion in high-demand categories, such as Seafood and Animal Processing, offer paths for strategic growth and enhanced productivity across the sector.

[2] *Gross Regional Product (GRP) is the GDP of the region of study. It represents the sum of total industry earnings, taxes on production & imports, and profits, less subsidies.*

[3] *Competitive Effect illustrates how much change in an industry is not explained by national economic or industry trends. A positive competitive effect means the region has unique characteristics, giving it a competitive advantage in that respective industry. However, a negative competitive effect indicates that the industry is not growing as quickly as expected based on national and industry trends in the US.*

[4] *Location quotient (LQ) is a measure of industry concentration within a region. An LQ of 1.0 means that an industry is as concentrated within the region as it is on a national level. An LQ greater than 1.0 indicates that an industry is more concentrated in a region than at the national level.*

Regional Baseline Assessment

New England Food and Beverage Processing Performance Overview

STATE	TOTAL JOBS (2023)	KEY SUBSECTORS	JOB GROWTH (2018-2023)	GRP PER WORKER	COMPETITIVE EFFECT	TOP EMPLOYMENT CONCENTRATIONS
Connecticut	12,286	Bakeries & Tortilla Mfg, Beverage, Other Food Mfg	15%	$143,842	438	1. Other Snack Food 2. Ice Cream & Frozen Desserts 3. Retail Bakeries
Maine	8,707	Beverage Mfg, Bakeries, Seafood Processing	14%	$129,287	253	1. Seafood Processing 2. Bottled Water Mfg 3. Fruit & Vegetable Preserving
Massachusetts	34,586	Bakeries & Tortilla Mfg, Beverage Mfg, Seafood	11%	$132,840	-55	1. Seafood Prep & Packaging 2. Bakeries & Tortilla Mfg 3. Grain & Oilseed Milling
New Hampshire	4,846	Beverage Mfg, Sugar & Confectionery, Bakeries	21%	$159,347	316	1. Sugar & Confectionery Mfg 2. Beverage Mfg 3. Seafood Processing
Rhode Island	4,884	Animal Processing, Bakeries, Other Food Mfg	29%	$107,075	689	1. Animal Processing 2. Bakeries & Tortilla Mfg 3. Other Food Mfg
Vermont	6,983	Dairy Mfg, Beverage, Bakeries	6%	$146,103	-470	1. Dairy Product Mfg 2. Sugar & Confectionery Mfg 3. Ice Cream & Frozen Desserts
New England Total	**72,247**	Bakeries, Beverage Mfg., Other Food Mfg.	**14%**	**$135,593**	**1,171**	1. Seafood Processing 2. Frozen Cakes, Pies, and Pastries 3. Bottled Water Mfg.

Source: Lightcast

Real Estate and Infrastructure Analysis

This analysis provides an overview of Maine's food processing and cold storage infrastructure, highlighting centralization patterns, gaps in coverage, and industrial real estate trends that present strategic opportunities for expansion.

Industrial Real Estate Market Trends

Maine's industrial real estate market demonstrates capacity for supporting new food processing and cold storage facilities. With over 67 million square feet across the state, the industrial sector has seen consistent growth, though recent years recorded negative net absorption, indicating more vacated than newly occupied space. This trend, along with slightly elevated vacancy rates, suggests an opportunity to repurpose existing industrial properties for food processing or refrigeration, given appropriate modifications.

Food Processing Real Estate Market Overview

Maine's food processing real estate spans 1.5 million square feet, with the majority concentrated in Cumberland and York counties. Low vacancy rates[5] , consistently below 2% over the past decade, underscore the limited availability of food processing space. While expansions have been stagnant, a spike in net absorption[6] in 2024 points to increasing demand. Converting available industrial spaces into food processing facilities offers a feasible solution, as these properties typically require less specialization than cold storage facilities.

Cold Storage Real Estate Market Overview

Cold storage real estate in Maine is limited, with just over 667,000 square feet across 12 buildings. Cumberland and Kennebec counties hold the majority, with 40% of facilities concentrated in single-tenant buildings. The market has faced fluctuating vacancy rates, though recent years have seen vacancy rates drop to zero, highlighting strong demand and limited availability. The shortage of multi-tenant cold storage space in Maine indicates a need for additional facilities, especially to meet the needs of multiple users who benefit from shared storage access.

Centralization of Food Processing and Cold Storage Facilities

Food processing and cold storage facilities are predominantly located in southern Maine, particularly in Cumberland and York counties, where infrastructure, population density, and proximity to major highways support the efficient transport of perishable goods to southern markets. This clustering facilitates logistical efficiencies for high-demand areas, although it leaves significant gaps in access for northern Maine, where facilities are sparse or nonexistent.

Cold Storage Opportunities

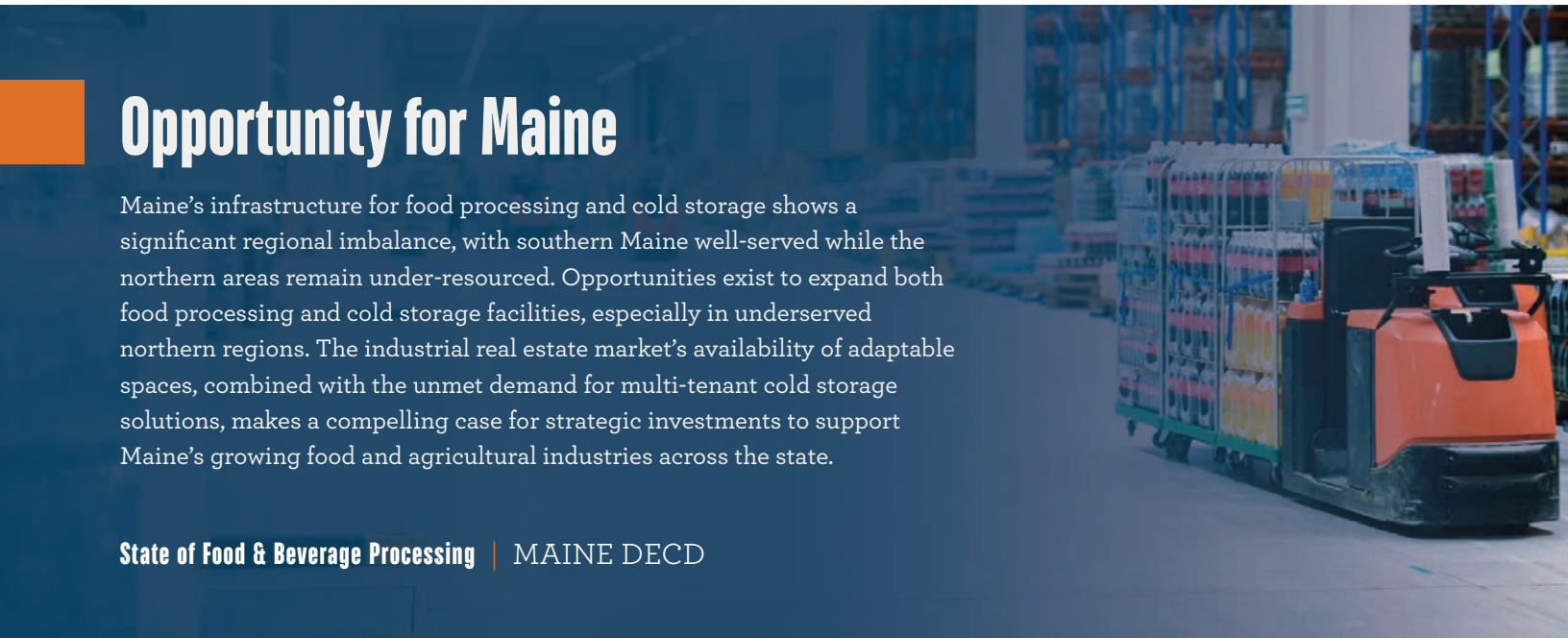
While existing cold storage facilities are mostly concentrated around Portland and Augusta, the northern regions lack sufficient access, creating an opportunity to expand cold storage infrastructure in rural areas. Enhancing cold storage capacity in these regions would support local agricultural and fisheries industries, reduce waste, and improve the overall supply chain for perishable goods. The upcoming Maine International Cold Storage Facility at Portland's Port Authority, set to launch in late 2024, will expand capacity in the south; however, northern Maine remains underserved, presenting a potential area for investment.

[5]A vacancy rate (square footage and rate) is the total unoccupied square footage and rate of unoccupied properties in a study area.

[6]Net Absorption (SF) is the amount of new space delivered to the market and the change in occupied space (vacant to occupied).

Opportunity for Maine

Maine's infrastructure for food processing and cold storage shows a significant regional imbalance, with southern Maine well-served while the northern areas remain under-resourced. Opportunities exist to expand both food processing and cold storage facilities, especially in underserved northern regions. The industrial real estate market's availability of adaptable spaces, combined with the unmet demand for multi-tenant cold storage solutions, makes a compelling case for strategic investments to support Maine's growing food and agricultural industries across the state.



Collaborative Effort for Small and Medium-Sized Producers

This section reviews case studies from four organizations across the US, that have successfully addressed the distribution and processing challenges faced by small food producers. These organizations exemplify various collaborative models, each uniquely structured to bridge distribution gaps for small and mid-sized producers by leveraging nonprofit and cooperative frameworks. Key findings reveal common themes of shared resources, market expansion opportunities, and tailored support for local food ecosystems, underscoring the strengths of nonprofit and cooperative models in addressing scale challenges.

Common Themes of Collaborative Assets

Across the case studies, several common assets emerge that facilitate the success of these initiatives:

- **Shared-Use Infrastructure:** From commercial kitchens to storage facilities, these models prioritize shared spaces that reduce overhead for small producers, allowing them to grow without large upfront investments.
- **Aggregation and Distribution Networks:** Many of these organizations aggregate products, allowing small producers to access wider markets. This is often coupled with flexible distribution options that enable cost-effective transportation for lower-volume producers.
- **Business Support Services:** Business advising, technical assistance, and product development support empower small producers to scale operations, improve product quality, and meet regulatory requirements.
- **Market Creation and Branding:** Programs such as EcoCertified (Red Tomato) and LINC Malt connect producers to unique markets, creating product differentiation and higher value-added opportunities for local products.

Strengths of Case Studies

These collaborative models demonstrate several strengths that contribute to their effectiveness:

1. **Cost Efficiency for Producers:** By offering shared-use facilities and asset-free logistics, these models reduce the financial burden on small producers, making growth accessible without significant capital.
2. **Enhanced Market Access:** Aggregating products allows small producers to tap into larger markets, including institutional and regional retail channels that would otherwise be inaccessible due to limited volume or distribution capacity.
3. **Flexibility and Adaptability:** Each organization adapts its services to meet diverse producer needs, from co-packing and storage to direct sales and subscription box models, which strengthens the resilience of regional food systems.
4. **Sustainable Growth:** By creating new, value-added markets and focusing on sustainable practices, these models not only support economic viability for producers but also foster environmentally and socially responsible food systems.

These case studies highlight the essential role of collaborative and nonprofit-based models in empowering small and mid-sized producers to thrive in competitive markets. Their diverse approaches to infrastructure sharing, market creation, and business support contribute to sustainable regional food systems while helping small producers scale efficiently and effectively.

Priority Areas to Support the Growth of Food & Beverage Processing in Maine

The following priority areas offer potential pathways for the Maine Department of Economic and Community Development (DECD) to consider in collaboration with partners across the state. These areas are intended to complement ongoing initiatives and inform future plans involving multiple organizations and stakeholders, rather than serve as specific directives for DECD. The guidance presented here is broad and does not include detailed information about partners or stakeholders at this stage. Priority Areas are intended to uplift strategic opportunities to support the growth of Maine's food and beverage sector by emphasizing the importance of enhancing value-added activities. This approach focuses on retaining economic benefits within the state and fostering the development of higher-wage jobs.

INFRASTRUCTURE

- **Support the Development of Cold Storage Facilities Along Key Infrastructure Corridors**
  Support the collaboration with local developers, municipalities, and food processors to identify strategic locations along Maine's major transportation routes for new cold storage facilities. These should be prioritized to fill critical gaps in the food value chain. This infrastructure would serve as a backbone for regional distribution, increase business capacity, and facilitate larger distribution areas for Maine products.
- **Encourage Conducting Feasibility Studies for New Food Processing Plants**
  Encourage feasibility studies to pinpoint high-potential locations for new food processing plants, including possible cooperative and shared-use models. This additional analysis will need to map potential sites based on utility availability, watersheds, major transportation networks, and population densities.
- **Identify Aggregated Distribution Points to Lower Costs and Boost Efficiency**
  Identify and support centralized distribution points for Maine's food and beverage sector to consolidate shipments, reduce transportation costs, and enhance logistics efficiency.
- **Promote Co-Packing and Ready-Made Product Opportunities**
  Promote the development of co-packing facilities that can produce ready-made products, responding to the growing market demand.
- **Foster an Environment that Supports Food Testing Services for Local Processors**
  Foster an environment that increases access to and funds food testing services, especially for smaller institutions and businesses that need affordable access to quality testing.

COOPERATIVE MODELS

- **Support Cooperative Producer Model for Scaling Businesses**
  Encourage expanding existing cooperative models where smaller producers can pool resources and increase production volumes, making them more competitive in larger markets. This would involve legal structuring support, shared marketing, and coordination with supply chain stakeholders.
- **Integrate Bio-Packaging Companies with Maine Processors**
  Facilitate connections between food and beverage processors and bio-packaging[7] companies in Maine, keeping packaging production local and creating a closed-loop supply chain. This initiative can reduce costs, environmental impact, and create a unique branding opportunity for Maine products.

TECHNICAL ASSISTANCE AND FUNDING

- **Increase Awareness of Technical Assistance and Funding Programs**
  Expand outreach efforts to inform businesses about available technical assistance and funding opportunities through the Domestic Trade program. This involves targeted communication strategies for diverse audiences, including digital media, community events, and sector-specific outreach programs.
- **Decrease Funding Barriers by Supporting Grant Writers**
  Reduce funding barriers by supporting access to skilled grant writers through training, networks, or financial assistance.
- **Promote the Development of Peer-to-Peer Mentorship Programs Decrease Funding Barriers by Supporting Grant Writers**
  Promote and encourage mentorship programs within Maine's food and beverage industry, focusing on mentorship around distribution, operational challenges, and collaborative solutions. Peer mentoring could extend to shared logistics solutions, such as backhauling, cross-docking, and co-packing.

WORKFORCE DEVELOPMENT

- **Foster Networks that Build Strong Relationships with Workforce Development Providers**
  Foster a network of businesses and workforce development providers to ensure food processors can attract and retain talent. Facilitate partnerships between food businesses and educational institutions, aligning workforce development with industry needs.
- **Support Workers and Worker Retention with Wraparound Services**
  Collaborate with housing, childcare, eldercare, and transportation services to support talent attraction efforts. Provide a framework or toolkit for businesses to assist employees with these essential services, making employment in Maine's food processing industry more appealing.

[7] *Bio-packaging is a type of packaging made from renewable materials, including product alternatives like molded fiber packaging (wood-based products).*

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Regional Baseline Assessment

Regional Baseline Assessment

This regional assessment was conducted to better understand how Maine's food and beverage processing sector performs compared to its New England neighbors. This assessment starts with analyzing New England's food and beverage processing sector as a whole and then focuses on data relating to the detailed food manufacturing subsectors and how they perform in each of the six New England states (Maine, Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont). This assessment provides a deeper dive into the individual subsectors that make up the Food and Beverage Processing sector.

Key Findings

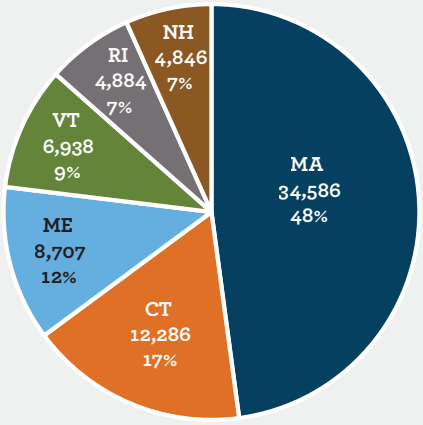
- **Employment and Establishments** Massachusetts leads New England in food and beverage processing employment and establishments, followed by Connecticut and Maine. Maine ranks third in both employment and establishments, though its establishments are smaller on average (20-22 employees) compared to Massachusetts (33 employees).
- **Subsector Composition** The largest subsector in New England is Bakeries and Tortilla Manufacturing, comprising 29% of regional employment. Beverage Manufacturing (22%) and Other Food Manufacturing (13%) are also significant.
- **Gross Regional Product (GRP) per Worker** New Hampshire, Vermont, and Connecticut outperform the New England average in GRP per worker due to specialization in high-value subsectors like Beverage and Dairy Manufacturing. Maine's GRP per worker ($129,287) is below average, affected by lower-value subsectors. There is potential to boost Maine's productivity through investment in higher-value subsectors.
- **Employment Concentration** Maine's food and beverage processing sector constitutes 1.2% of total state employment, higher than the New England average of 0.9%. Vermont has the highest concentration (1.9%), making it a key comparison state for understanding sector employment impact.
- **Sector Growth** Maine's sector grew by 13% from 2018-2023, outpacing Massachusetts and Vermont. Rhode Island saw the fastest growth (30%), driven by expansions in Animal Slaughtering and Processing.
- **Sales Productivity** Vermont leads in sales productivity per capita ($5,848), with Maine ranking second ($2,259), underscoring Vermont as a benchmark for productivity in the sector.

New England Food & Beverage Processing Summary

Total Employment and Establishments

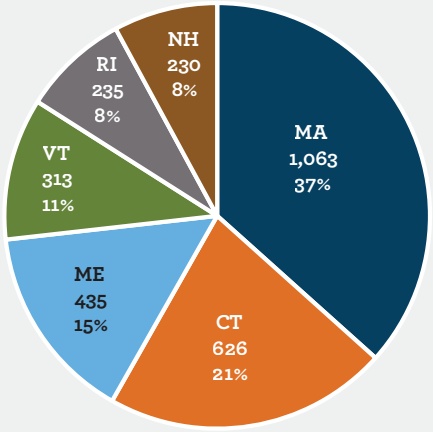
In 2023, Massachusetts accounted for the most significant share of Food and Beverage Processing employment and establishments, followed by Connecticut. Maine came in third place for the total number of jobs and establishments among the New England states in 2023, leading Vermont, Rhode Island, and New Hampshire. Overall, there were 72,247 total jobs in Food and Beverage Processing in New England in 2023.

Employment Distribution of New New England Food and Beverage Processing Sector, by State - 2023



Source: Lightcast, Camoin Associates

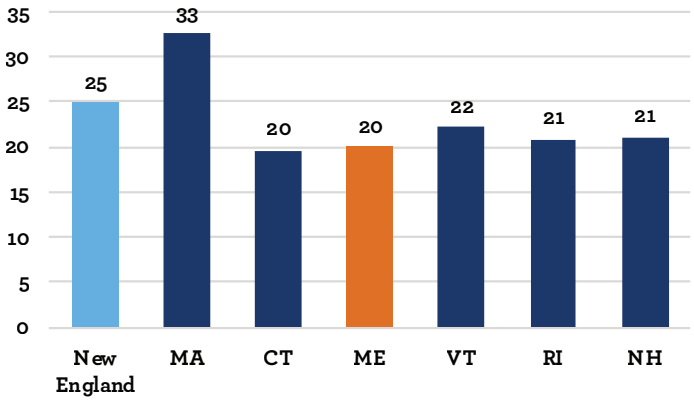
Establishments Distribution of New England Food and Beverage Processing Sector, by State - 2023



Source: Lightcast, Camoin Associates

On average, New England Food and Beverage Processing establishments have around 25 employees each. However, this is heavily driven by Massachusetts, which averages 33 employees per establishment, indicating that food processing in Massachusetts occurs at a higher scale and in more industrial settings. All other New England states have significantly lower averages, ranging from 20 to 22 jobs per establishment.

Average Employment Per Establishment for Food and Beverage Processing in New England, 2023



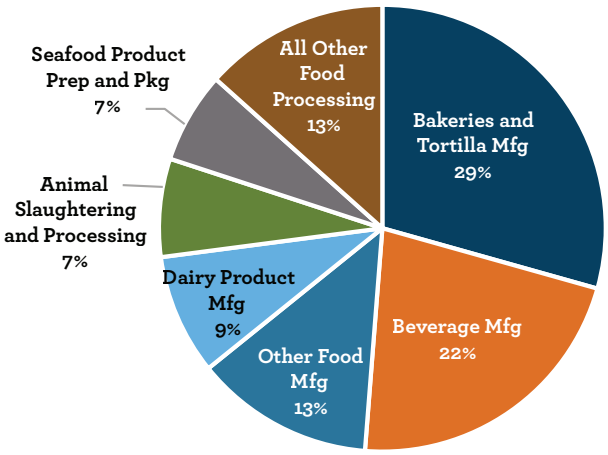
Source: Lightcast, Camoin Associates

Key Subsectors

In New England, Bakeries and Tortilla Manufacturing is the largest subsector, accounting for 29% of overall employment in New England's Food and Beverage Processing sector.

Other major subsectors are Beverage Manufacturing (22% of total), and Other Food Manufacturing (13%), which includes snack food production, coffee and tea, nuts, and nut butters, etc.

New England Food and Beverage Processing Employment Distribution by Subsector, 2023



Source: Lightcast, Camoin Associates

Gross Regional Product (GRP) and GRP Per Worker

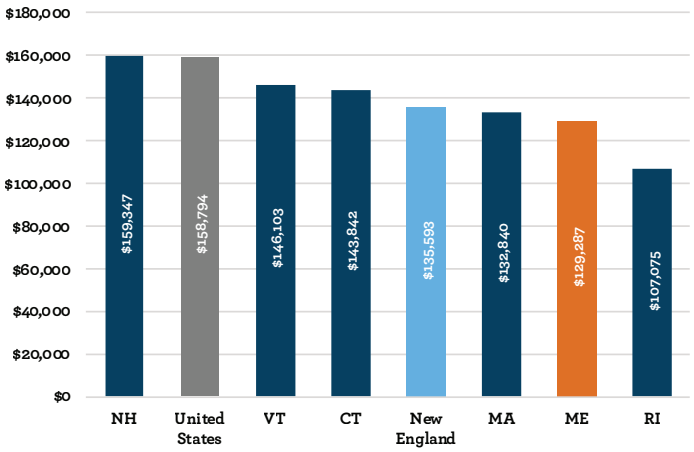
On average, in New England, each job in the Food and Beverage Processing sector contributes approximately $135,593 of GRP to the regional economy. This is lower than the US average of just over $158,800. New Hampshire, Vermont, and Connecticut have higher averages than the US and New England, while Maine, Massachusetts, and Rhode Island are lower. Overall, each Food and Beverage Processing job in Maine contributes $129,287 to the state's GRP.[8]

High GRP per worker in the Food and Beverage Processing Sector can be driven by a variety of factors, such as the state's ability to scale production, integration of technology, or the composition of states' food processing subsectors. In New England, states like New Hampshire, Vermont, and Connecticut tend to specialize in sectors with higher value-added food products regardless of geography. For example, Beverage Manufacturing and Dairy Product Manufacturing tend to be the most productive industries in New England in terms of GRP. These are the two largest industries in New Hampshire's food processing sector, with Beverage Manufacturing accounting for one-third of New Hampshire's food processing sector, and dairy accounting for another 14%.

Conversely, Bakeries and Tortilla Manufacturing tends to be the subsector with the lowest productivity in most New England states. This is the largest subsector in Massachusetts and Rhode Island and the second-largest subsector in Maine. Therefore, the overall GRP per worker is driven down in these three states. This data demonstrates that high concentrations in subsectors with relatively lower GRP is a driving force in the overall productivity of the food and beverage processing sector.

Maine faces an opportunity to improve overall productivity and drive GRP growth by making strategic investments in higher value-added subsectors like Grain and Oilseed Milling, Dairy Product Manufacturing, and Beverage Manufacturing.

GRP Per Worker in Food and Beverage Processing by New England State, 2023



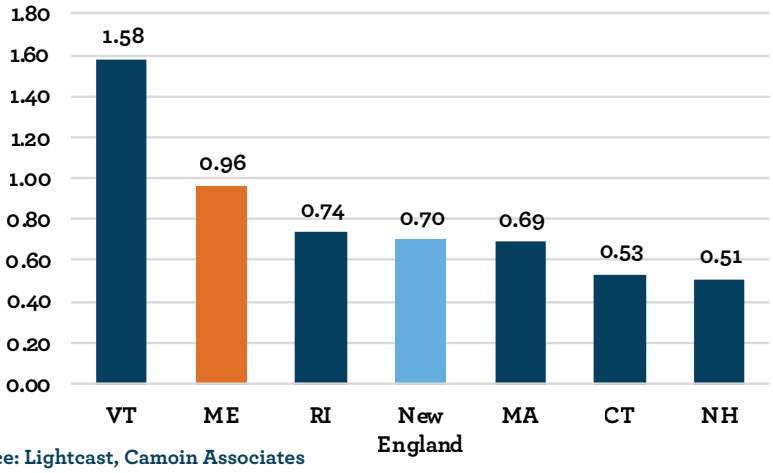
Source: Lightcast, Camoin Associates

[8] *Gross Regional Product (GRP) is the GDP of the region of study. It represents the sum of total industry earnings, taxes on production & imports, and profits, less subsidies.*

Employment Concentration

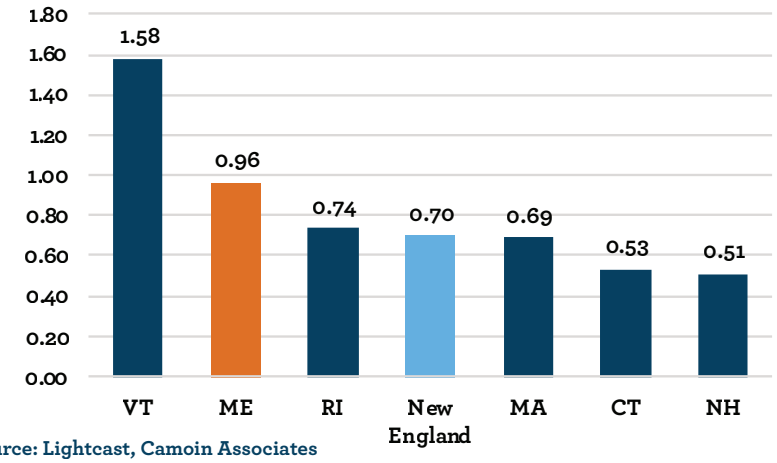
The Food and Beverage Processing sector accounts for 1.2% of Maine's total employment in 2023, a higher share than the New England Region's average of 0.9%. Vermont has the highest concentration in New England, at 1.9% of total employment, while New Hampshire has the smallest concentration, 0.6%.

Employment Concentration in Food and Beverage Processing by New England State, 2023



Source: Lightcast, Camoin Associates

Employment Concentration in Food and Beverage Processing by New England State, 2023



Source: Lightcast, Camoin Associates

While each state has Food and Beverage subsectors that have high concentrations, only Vermont has a high concentration for the overall sector (1.58). Maine is the second-most concentrated state in the sector, with an LQ of 0.96. This indicates that the state has a proportionally similar concentration of employment in the overall Food and Beverage Processing sector as the United States.

Location quotient (LQ) is a measure of industry concentration within a region. An LQ of 1.0 means that an industry is as concentrated within the region as it is on a national level. An LQ greater than 1.0 indicates that an industry is more concentrated in a region than at the national level.

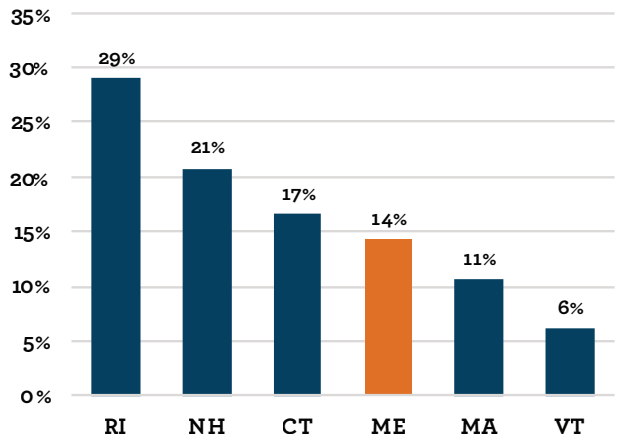
Drivers of Growth

Overall, New England's Food and Beverage Processing sector grew by 14% from 2018-2023. Maine's Food and Beverage Processing sector matched this rate and grew 14% from 2018-2023, ranking fourth out of the New England states for overall growth and outpacing Massachusetts and Vermont.

Rhode Island had the fastest growth over the five years, 30%, followed by New Hampshire at 19%. Major gains in the Animal Slaughtering and Processing subsector drove Rhode Island's growth.

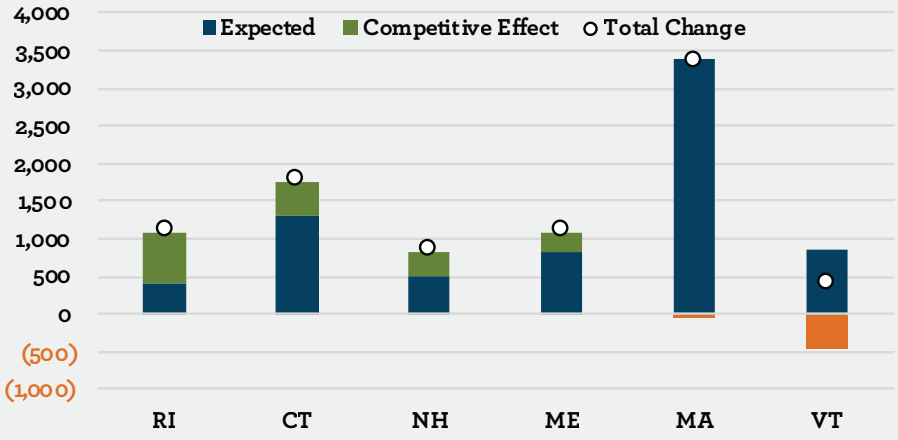
The **competitive effect** illustrates how much change in an industry is not explained by national economic or industry trends. A positive competitive effect means the region has unique characteristics, giving it a competitive advantage in that respective industry. However, a negative competitive effect indicates that the industry is not growing as quickly as expected based on national and industry trends in the US.

Total Employment Growth in Food and Beverage Processing, 2018-2023



Source: Lightcast

Components of Employment Change in the Food and Beverage Processing Sector, 2018-2023



Source: Lightcast, Camoin Associates

This data indicates that Maine's Food and Beverage Processing sector grew by over 250 jobs more than expected from 2018-2023. Rhode Island had the strongest competitive effect, growing 689 jobs more than expected based on national and industry trends. Rhode Island's strong competitive effect during the five years was largely driven by growth of over 600 jobs in the meat processing industry through the development of a new facility in Quonset.[9] Rhode Island was expected to grow by over 400 jobs without this business expansion.

[9] *Leslie, Alexandra. "RI Leaders Break Ground on New Meat Processing Facility." WPRI.com, 12 October 2018, www.wpri.com/news/ri-leaders-break-ground-on-new-meat-processing-facility/*

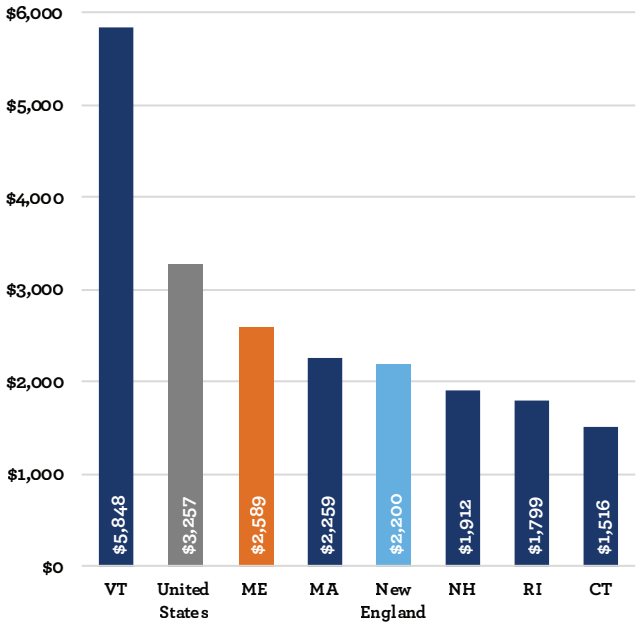
Sales

Sales measure the total revenue (gross receipts) generated by New England's Food and Beverage Processing Sector.[10] Much like GRP per capita, sales per capita is used to measure productivity.

On average, in New England, sales per capita in the Food and Beverage Processing Sector total approximately $2,200 per person. Out of the New England states, Vermont has the highest sales per capita, with the sector's sales totaling $5,848 per person. Sales per capita in Maine's Food and Beverage Processing Sector were approximately $2,259, the second highest out of the New England states.

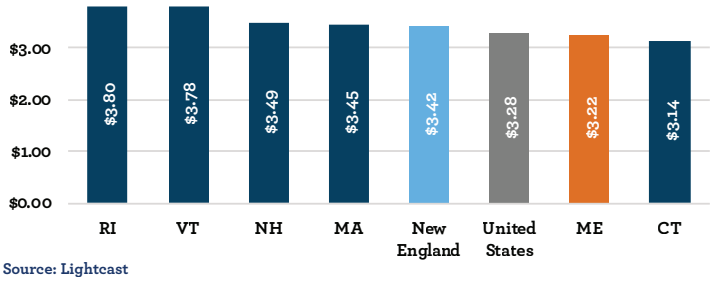
Unlike sales, which are exclusively revenues, Gross Regional Product (GRP) is the sum of earnings, taxes, and profits, minus subsidies. Comparing the sector's total sales to its GRP provides insights into its efficiency. Referring to the chart below, every dollar of GRP generated by the Food and Beverage Processing Sector in New England is associated with $3.42 in sales. In Maine, however, $1 of GRP is associated with sales of $3.22.

Sales Per Capita for the Food and Beverage Processing Sector by New England State, 2023



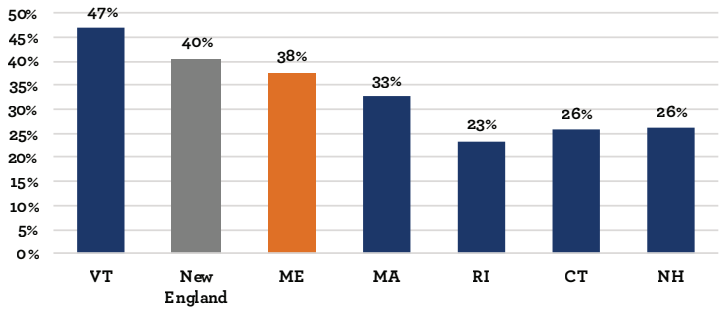
Source: Lightcast

Food and Beverage Processing Sales Per GRP for New England States, 2023



Source: Lightcast

Purchases Sourced from In-Region Food and Beverage Processing Producers by New England State, 2023



Source: Lightcast

Purchases From New England's Food and Beverage Processing Sector

The chart below shows the share of total B2B demand for processed food and beverages that were sourced from in-state producers. For example, in Maine, 38% of processed food and beverages (i.e., food that is not raw agricultural product) were purchased from processors based in Maine. This means that the remaining 62% was sourced from outside the state. In New England overall, 40% of B2B purchases of goods made by the Food and Beverage Processing Sector were sourced from within New England.

[10] *For more information on sales see: https://kb.lightcast.io/en/articles/6957499-how-do-demand-and-sales-differ.*

Snapshot: Maine's State Government and the Food Economy[11]

The table below displays the purchasing habits of Maine's state government (NAICS 902) from Maine's Food Economy. This table provides details on all Food Sector subsectors, including the Food and Beverage Processing Sector, as well as Crop Production, Animal Production, Support Activities for Animal Production, and Support Activities for Crop Production. Including these additional subsectors allows us to understand how Maine interacts with and supports the local Food Economy. Overall, 22% of Maine's state institution purchases of food products were from producers in Maine. 45% of purchases from the Seafood Product Preparation and Packaging subsector by Maine's government were from businesses within Maine. For seven of the fourteen food-related industries, Maine's state government makes more than 20% of its purchases from in-state suppliers (see table below for details).

Food Production & Food and Beverage Processing Sector In-Region vs Imported Purchases by Maine's Government, 2023

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
3117	Seafood Product Preparation and Packaging	$2,620,120	45%	$3,204,056	55%	$5,824,175
3118	Bakeries and Tortilla Manufacturing	$2,809,834	35%	$5,172,534	65%	$7,982,369
1152	Support Activities for Animal Production	$335,020	34%	$657,598	66%	$992,618
3119	Other Food Manufacturing	$6,038,410	33%	$12,082,348	67%	$18,120,758
3121	Beverage Manufacturing	$1,197,423	31%	$2,673,517	69%	$3,870,940
3116	Animal Slaughtering and Processing	$12,066,751	28%	$31,541,215	72%	$43,607,966
1110	Crop Production	$1,527,232	25%	$4,483,340	75%	$6,010,572
1151	Support Activities for Crop Production	$552,768	9%	$5,338,644	91%	$5,891,411
3115	Dairy Product Manufacturing	$2,710,856	9%	$26,945,898	91%	$29,656,754
3113	Sugar and Confectionery Product Manufacturing	$77,720	8%	$948,450	92%	$1,026,170
1120	Animal Production	$172,556	7%	$2,163,456	93%	$2,336,012
3112	Grain and Oilseed Milling	$127,692	6%	$1,901,216	94%	$2,028,908
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$715,843	6%	$12,042,533	94%	$12,758,377
3111	Animal Food Manufacturing	$3,973	1%	$608,353	99%	$612,326
	Total	**$30,956,198**	**22%**	**$109,763,158**	**78%**	**$140,719,356**

Source: Lightcast

Policy Spotlight: Local Food Production and Consumption

New England Feeding New England, a project of the New England Food System Planners Partnership, is a 10-year initiative to create a stable and reliable food system in New England. Its primary goal is for 30% of the food consumed within New England to be produced, harvested, or caught within New England.

In Maine, the Local Procurement Program works to connect food produced in Maine to institutions such as schools, hospitals, and correctional facilities. By 2025, the Maine Department of Agriculture, Conservation, and Forestry aims to spend at least 20% of their food budget on foods produced in the state. The program has brought heightened awareness of the importance of local food consumption and has already brought results – as of 2024, 44% of Mountain View Correctional Facility's food budget was spent on Maine-produced food.[14]

[11] The term Food Economy refers to all of the subsectors in the Food and Beverage Processing Sector, as well as Crop Production, Animal Production, Support Activities for Animal Production, and Support Activities for Crop Production

[12] This sector includes all state government activities, including public education, health care, public safety, correctional institutions, and other executive, legislative, and judicial activities.

[13] https://nefoodsystemplanners.org/

[14] https://www.realmaine.com/farm-stories/maines-local-foods-procurement-program-works-to-increase-farm-to-institution-food-purchasing/

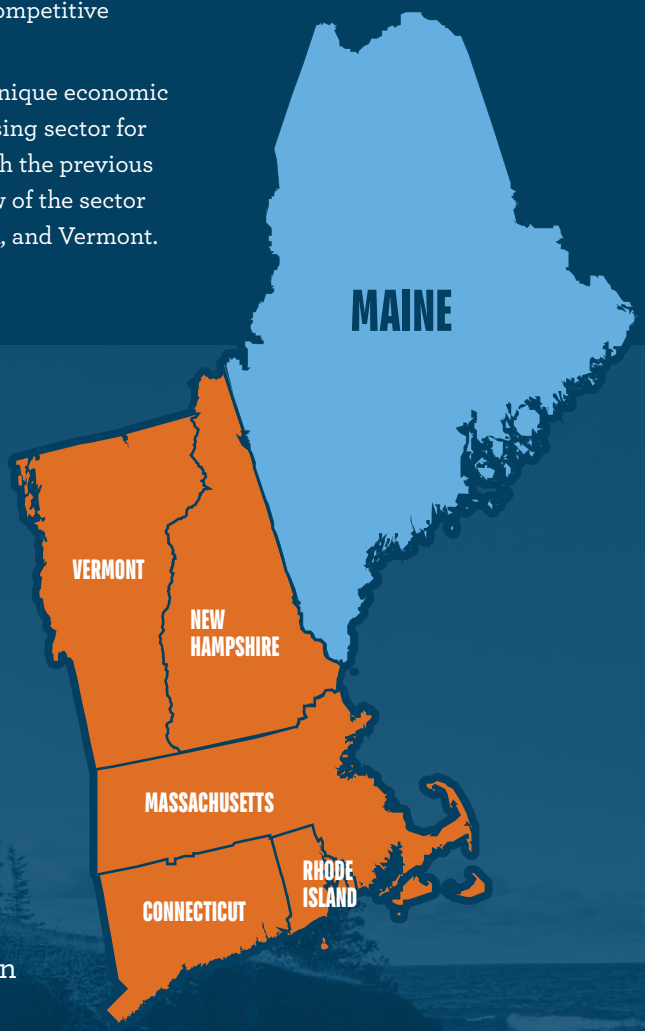
NEW ENGLAND

State-Level Food and Beverage Processing Profiles

The food sector plays a key role in the economy of New England. Each state in the region has its own strengths, specialties, and opportunities.

Examining the full Food and Beverage Processing Sector throughout the region provides a baseline overview of the sector. More detail is needed to fully understand Maine's strengths, weaknesses, and opportunities and to identify its competitive advantages in the context of the New England states.

The following section of the report provides a deeper analysis of the unique economic trends and state-level dynamics within the Food and Beverage Processing sector for each of the six New England states. While data points may overlap with the previous section, the state profiles are meant to provide an individual state view of the sector for Maine, Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont.



Data in this section includes:

- Key Subsectors
- Employment Growth
- Gross Regional Product and Productivity
- Subsector Competitiveness
- Employment Concentration and Sector Specialization

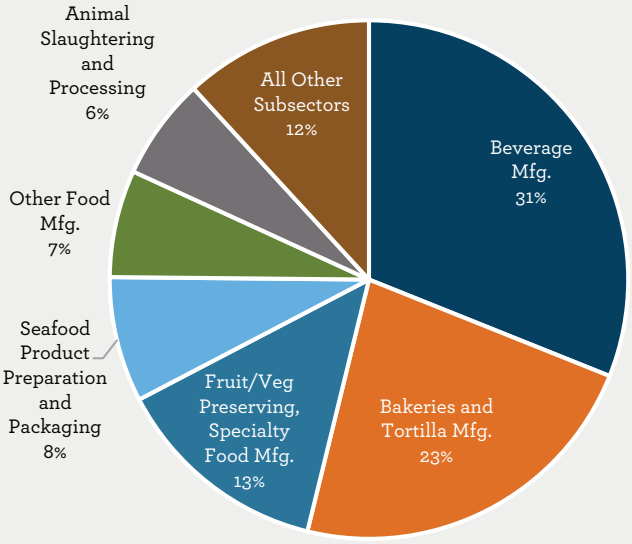
Maine

Key Subsectors

In 2023, Maine had 8,707 jobs in the Food and Beverage Processing sector. Beverage Manufacturing was the largest subsector in Maine, with over 2,705 jobs and accounting for around 31% of the sector's total jobs.

Other significant Food and Beverage Processing subsectors in Maine are Bakeries as well as Fruit & Vegetable Preserving and Specialty Food Manufacturing, accounting for 23% and 13% of the sector's employment, respectively.

Maine Employment Distribution of Food and Beverage Processing Subsectors, 2023



Employment Overview

Maine's Fruit and Vegetable Preserving/Specialty Food Manufacturing sector accounts for 27% of total employment in the subsector in New England, the largest concentration in Maine. Other subsectors with strong representation in Maine are Beverage Manufacturing and Seafood Product Preparation and Packaging. Overall, Maine's Food and Beverage Processing employment accounts for 12% of the total sector employment in New England, outpacing the 9% seen across all sectors of the economy.

Maine's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	68	9%
3112	Grain and Oilseed Milling	87	13%
3113	Sugar and Confectionery Product Manufacturing	380	11%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	1,178	27%
3115	Dairy Product Manufacturing	494	8%
3116	Animal Slaughtering and Processing	552	11%
3117	Seafood Product Preparation and Packaging	680	14%
3118	Bakeries and Tortilla Manufacturing	1,981	9%
3119	Other Food Manufacturing	582	6%
3121	Beverage Manufacturing	2,705	17%
	Total Food and Beverages	**8,707**	**12%**
	Total All Sectors	**735,189**	**9%**

Source: Lightcast

Processing employment accounts for 12% of the total sector employment in New England, outpacing the 9% seen across all sectors of the economy.

Maine's Food and Beverage Processing Sector has seen strong growth in the last five years, increasing by 14% from 2018 to 2023 and marginally outpacing New England's total employment growth. Beverage Manufacturing experienced the strongest growth, adding 767 jobs and outpacing New England's growth rate for the subsector.

Maine Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in New England
3111	Animal Food Manufacturing	85	68	(17)	-20%	20%
3112	Grain and Oilseed Milling	56	87	31	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	231	380	149	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	1,295	1,178	(118)	-9%	2%
3115	Dairy Product Manufacturing	520	494	(26)	-5%	(7%)
3116	Animal Slaughtering and Processing	486	552	66	14%	28%
3117	Seafood Product Preparation and Packaging	744	680	(64)	-9%	29%
3118	Bakeries and Tortilla Manufacturing	1,627	1,981	354	22%	7%
3119	Other Food Manufacturing	634	582	(52)	-8%	16%
3121	Beverage Manufacturing	1,938	2,705	767	40%	35%
	Total Food and Beverages	**7,616**	**8,707**	**1,091**	**14%**	**13%**

Source: Lightcast

GRP and GRP Per Job

The Food and Beverage Processing sector added over $1.1 billion to Maine's GRP in 2023, for an average of $129,287 per job in the sector. Beverage Manufacturing contributed just under 50% of the total Food and Beverage Processing sector's GRP.

GRP and GRP Per Job in Maine's Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job
3111	Animal Food Manufacturing	$10.1	$148,333
3112	Grain and Oilseed Milling	$22.8	$262,963
3113	Sugar and Confectionery Product Manufacturing	$29.6	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$132.5	$112,537
3115	Dairy Product Manufacturing	$69.1	$139,659
3116	Animal Slaughtering and Processing	$49.9	$90,297
3117	Seafood Product Preparation and Packaging	$64.2	$94,439
3118	Bakeries and Tortilla Manufacturing	$122.6	$61,878
3119	Other Food Manufacturing	$70.6	$121,273
3121	Beverage Manufacturing	$554.4	$204,935
	Total Food and Beverages	**$1,125.7**	**$129,287**
	Total All Sectors	**$84,027.6**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Overall, Maine's competitive effect for the Food and Beverage Processing sector was +253, indicating that the state added 253 more jobs in the sector from 2018-2023 than would be expected based on national industry and economic trends. Beverage Manufacturing as well as Bakeries and Tortilla Manufacturing have strong positive competitive effects. In contrast, several subsectors had negative competitive effects of over 90 jobs. These include Fruit and Vegetable Preserving and Specialty Food Manufacturing; and Other Food Manufacturing; and Dairy Product Manufacturing.

Seafood Product Preparation and Packaging had the strongest employment concentration in Maine, at 4.69. This indicates that Seafood Processing in Maine has nearly 5 times the employment concentration than the national average.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	0.21	(31)	$79,042
Grain and Oilseed Milling	0.31	27	$70,004
Sugar and Confectionery Product Manufacturing	1.08	134	$37,580
Fruit and Vegetable Preserving and Specialty Food Manufacturing	1.55	(151)	$70,629
Dairy Product Manufacturing	0.69	(91)	$82,132
Animal Slaughtering and Processing	0.23	39	$57,548
Seafood Product Preparation and Packaging	4.69	(41)	$62,148
Bakeries and Tortilla Manufacturing	1.27	206	$47,847
Other Food Manufacturing	0.52	(152)	$61,320
Beverage Manufacturing	1.90	313	$71,778
Total Food and Beverages	**0.96**	**253**	**$62,959**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

On a more detailed level, Bottled Water Manufacturing is the most concentrated industry in the sector, with almost 10 times the employment concentration in Maine as in the nation. In total, 8 detailed industries in Maine have strong employment concentration, second in New England only to Vermont, which has 14 highly concentrated industries in the Food and Beverage Processing sector.

Maine Industries with Employment Concentration >1.5, 2023

Description	Employment Concentration
Bottled Water Manufacturing	9.67
Frozen Fruit, Juice, and Vegetable Manufacturing	5.16
Seafood Product Preparation and Packaging	4.69
Frozen Cakes, Pies, and Other Pastries Manufacturing	3.48
Distilleries	3.08
Breweries	2.73
Confectionery Manufacturing from Purchased Chocolate	1.85
Fruit and Vegetable Canning	1.71
All Food and Beverage Processing	**0.96**

Source: Lightcast, Camoin Associates

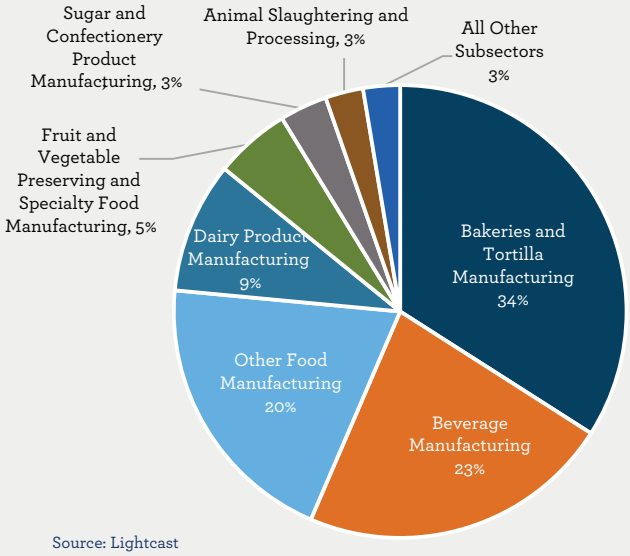
Connecticut

Key Subsectors

In 2023, Connecticut had 12,286 jobs in the Food and Beverage Processing sector. Bakeries and Tortilla Manufacturing was the largest subsector in Connecticut, with over 4,183 jobs and accounting for around one-third of total jobs for the sector.

Other significant Food and Beverage Processing subsectors in Connecticut are Beverage Manufacturing and Other Food Manufacturing, each accounting for around one-fifth of total sector employment. Other Food Manufacturing includes foods such as snack foods, coffee and tea, nuts and peanut butter, and others.

Connecticut Employment Distribution of Food and Beverage Processing Subsectors, 2023



Source: Lightcast

Employment Overview

26% of New England's Other Food Manufacturing is in Connecticut. This subsector includes manufacturing products such as chips, popcorn, and pretzels. Other subsectors with strong representation in Connecticut are Grain and Oilseed Milling and Bakeries and Tortilla Manufacturing, which comprise similar shares of regional employment as the total for all sectors in Connecticut (23%).

Connecticut's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	88	11%
3112	Grain and Oilseed Milling	131	20%
3113	Sugar and Confectionery Product Manufacturing	417	12%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	664	15%
3115	Dairy Product Manufacturing	1,151	18%
3116	Animal Slaughtering and Processing	333	6%
3117	Seafood Product Preparation and Packaging	104	2%
3118	Bakeries and Tortilla Manufacturing	4,183	20%
3119	Other Food Manufacturing	2,461	26%
3121	Beverage Manufacturing	2,754	17%
	Food and Beverage Processing	**12,286**	**17%**
	All Sectors	**1,875,868**	**23%**

Source: Lightcast

Connecticut's Food and Beverage Processing Sector has seen strong growth in the last five years, increasing by 15% from 2018 to 2023 and outpacing both Maine and New England's total employment growth. Other Food Manufacturing, along with Beverage Manufacturing, experienced the strongest growth, each adding over 600 jobs, although Maine outpaced Connecticut on a rate basis for Beverage Manufacturing.

Connecticut Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in Maine	% Change in New England
3111	Animal Food Manufacturing	51	88	37	74%	(20%)	20%
3112	Grain and Oilseed Milling	145	131	(14)	(10%)	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	493	417	(76)	(15%)	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	803	664	(139)	(17%)	(9%)	2%
3115	Dairy Product Manufacturing	1,031	1,151	120	12%	(5%)	(7%)
3116	Animal Slaughtering and Processing	307	333	26	8%	14%	28%
3117	Seafood Product Preparation and Packaging	80	104	24	30%	(9%)	29%
3118	Bakeries and Tortilla Manufacturing	3,860	4,183	322	8%	22%	7%
3119	Other Food Manufacturing	1,701	2,461	760	45%	(8%)	16%
3121	Beverage Manufacturing	2,058	2,754	697	34%	40%	35%
	Total Food and Beverages	**10,530**	**12,286**	**1,756**	**17%**	**14%**	**13%**

Source: Lightcast

Regarding growth rates, Animal Food Manufacturing and Other Food Manufacturing had the strongest five-year performance compared to Maine and New England. Similarly, Dairy Product Manufacturing grew by 12% in Connecticut despite declining by 5% in Maine and 7% in New England.

GRP and GRP Per Job

The Food and Beverage Processing sector added over $1.7 billion to Connecticut's GRP in 2023, for an average of $143,842 per job in the sector. Compared to Maine, Connecticut has a higher GRP per Job in nearly all subsectors, except for Fruit and Vegetable Preserving and Specialty Food Manufacturing.

GRP and GRP Per Job in Connecticut's Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job	Maine GRP Per Job
3111	Animal Food Manufacturing	$16.1	$182,816	$148,333
3112	Grain and Oilseed Milling	$27.8	$211,694	$262,963
3113	Sugar and Confectionery Product Manufacturing	$38.3	$91,776	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$72.3	$108,949	$112,537
3115	Dairy Product Manufacturing	$154.1	$133,876	$139,659
3116	Animal Slaughtering and Processing	$46.4	$139,474	$90,297
3117	Seafood Product Preparation and Packaging	$12.9	$124,316	$94,439
3118	Bakeries and Tortilla Manufacturing	$300.2	$71,775	$61,878
3119	Other Food Manufacturing	$520.2	$211,328	$121,273
3121	Beverage Manufacturing	$579.0	$210,220	$204,935
	Total Food and Beverages	$1,767.3	$143,842	$129,287
	Total All Sectors	**$313,587.8**	**$167,169**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Overall, Connecticut's competitive effect for the Food and Beverage Processing sector was +438, indicating that the state added 438 more jobs in the sector from 2018-2023 than would be expected based on national industry and economic trends. Other Food Manufacturing, as well as Beverage Manufacturing, have strong positive competitive effects. In contrast, Fruit and Vegetable Preserving and Specialty Food Manufacturing, as well as Sugar and Confectionery Product Manufacturing, have notable negative competitive effects.

Only one major subsector in Connecticut has an employment concentration value above 1.0, Bakeries and Tortilla Manufacturing. Meanwhile, the average earnings per job in the sector in Connecticut total almost $64,542 per year.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	0.11	29	$66,678
Grain and Oilseed Milling	0.18	(24)	$90,439
Sugar and Confectionery Product Manufacturing	0.46	(109)	$43,410
Fruit and Vegetable Preserving and Specialty Food Manufacturing	0.34	(160)	$65,073
Dairy Product Manufacturing	0.63	(9)	$74,521
Animal Slaughtering and Processing	0.06	9	$88,329
Seafood Product Preparation and Packaging	0.28	26	$77,160
Bakeries and Tortilla Manufacturing	1.05	(30)	$54,105
Other Food Manufacturing	0.86	492	$75,634
Beverage Manufacturing	0.76	215	$64,731
Total Food and Beverages	**0.53**	**438**	**$64,542**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

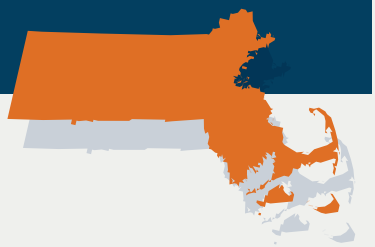
Overall, Connecticut's employment concentration for the sector is 0.53, meaning employment in Food and Beverage Processing is about half as concentrated in Connecticut as in the US on average. Three industries have a concentration higher than 1.5, including Other Snack Food Manufacturing, Ice Cream and Frozen Dessert Manufacturing, and Retail Bakeries. For each of these, Connecticut has a higher employment concentration than Maine, although Maine's concentration is close for Retail Bakeries.

Connecticut Industries with Employment Concentration >1.5, 2023 (6-Digit)

Description	Connecticut	Maine
Other Snack Food Manufacturing	2.09	0.08
Ice Cream and Frozen Dessert Manufacturing	2.02	0.84
Retail Bakeries	1.50	1.46
All Food and Beverage Processing	**0.53**	**0.96**

Source: Lightcast, Camoin Associates

Massachusetts

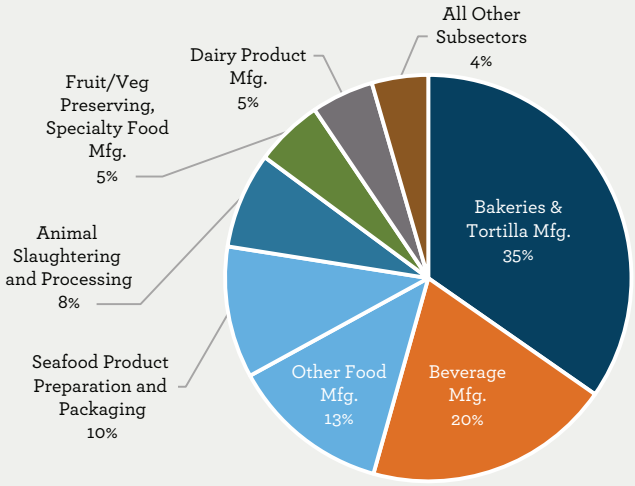


Key Subsectors

In 2023, Massachusetts had 34,586 jobs in the Food and Beverage Processing sector, the highest number of sector jobs out of all the New England states. Bakeries and Tortilla Manufacturing was the largest subsector in Massachusetts, with over 11,995 jobs and accounting for about 35% of the sector's total jobs.

Other significant Food and Beverage Processing subsectors in Massachusetts include Beverage Manufacturing and Other Food Manufacturing, which account for 20% and 13% of sector employment, respectively. Other Food Manufacturing includes snacks, coffee, tea, nuts, peanut butter, and other items.

Massachusetts Employment Distribution of Food and Beverage Processing Subsectors, 2023



Source: Lightcast

Employment Overview

In Massachusetts, the Seafood Product Preparation and Packaging subsector has 3,554 jobs. These jobs account for 75% of all Seafood Product Preparation and Packaging jobs in New England. Other subsectors with strong representation in Massachusetts are Bakeries and Tortilla Manufacturing (56%) and Grain and Oilseed Milling (52%).

Massachusetts's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	104	13%
3112	Grain and Oilseed Milling	357	55%
3113	Sugar and Confectionery Product Manufacturing	1,090	32%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	1,873	44%
3115	Dairy Product Manufacturing	1,717	27%
3116	Animal Slaughtering and Processing	2,641	51%
3117	Seafood Product Preparation and Packaging	3,622	75%
3118	Bakeries and Tortilla Manufacturing	11,995	56%
3119	Other Food Manufacturing	4,384	46%
3121	Beverage Manufacturing	6,803	43%
	Food and Beverage Processing	**34,586**	**48%**
	All Sectors	**4,049,421**	**49%**

Source: Lightcast

Massachusetts's Food and Beverage Processing Sector has grown in the last five years, increasing 11% from 2018 to 2023. However, this growth trails sector employment growth in Maine and New England. The Beverage Manufacturing and Seafood Product Preparation and Packaging subsectors experienced the strongest growth, each adding over 1,000 jobs.

Regarding growth rates, Seafood Product Preparation and Packaging (+47%) had the strongest five-year performance compared to Maine (-9%) and New England (+29%). For the same period, jobs in Maine's Sugar and Confectionery Product Manufacturing Subsector increased by 65%, while subsector jobs in Massachusetts declined by 14%.

Massachusetts Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in Maine	% Change in New England
3111	Animal Food Manufacturing	76	104	28	36%	(20%)	20%
3112	Grain and Oilseed Milling	684	357	(328)	(48%)	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	1,271	1,090	(181)	(14%)	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	1,583	1,873	290	18%	(9%)	2%
3115	Dairy Product Manufacturing	2,461	1,717	(744)	(30%)	(5%)	(7%)
3116	Animal Slaughtering and Processing	2,342	2,641	299	13%	14%	28%
3117	Seafood Product Preparation and Packaging	2,466	3,622	1,157	47%	(9%)	29%
3118	Bakeries and Tortilla Manufacturing	11,351	11,995	644	6%	22%	7%
3119	Other Food Manufacturing	3,855	4,384	529	14%	(8%)	16%
3121	Beverage Manufacturing	5,154	6,803	1,648	32%	40%	35%
	Total Food and Beverages	**31,244**	**34,586**	**3,342**	**11%**	**14%**	**13%**

Source: Lightcast

GRP and GRP Per Job

The Food and Beverage Processing sector added over $4.5 billion to Massachusetts's GRP in 2023 for an average of $132,840 per sector job. Overall, the sector's GRP per job is lower in Massachusetts compared to Maine. In Massachusetts, the GRP per job in the Food and Beverage Processing sector is also lower than the GRP per job for all sectors in the state. The highest GRP per job is observed in the Grain and Oilseed Milling Subsector ($274,402), followed by the Beverage Manufacturing The highest GRP per job is observed in the Grain and Oilseed Milling Subsector ($274,402), followed by the Beverage Manufacturing Subsector ($190,362). Subsector ($190,362).

GRP and GRP Per Job in Massachusetts Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job	Maine GRP Per Job
3111	Animal Food Manufacturing	$18.6	$179,218	$148,333
3112	Grain and Oilseed Milling	$97.9	$274,402	$262,963
3113	Sugar and Confectionery Product Manufacturing	$118.8	$109,067	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$226.6	$120,973	$112,537
3115	Dairy Product Manufacturing	$300.8	$175,135	$139,659
3116	Animal Slaughtering and Processing	$360.7	$136,549	$90,297
3117	Seafood Product Preparation and Packaging	$407.2	$112,419	$94,439
3118	Bakeries and Tortilla Manufacturing	$976.5	$81,409	$61,878
3119	Other Food Manufacturing	$792.4	$180,737	$121,273
3121	Beverage Manufacturing	$1,294.9	$190,362	$204,935
	Total Food and Beverages	**$4,594.4**	**$132,840**	**$129,287**
	Total All Sectors	**$665,922.5**	**$164,449**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Compared to other New England states, Massachusetts has the largest Food and Beverage Processing sector. However, between 2018 and 2023, the state's competitive effect was negative for the sector. In other words, the state's Food and Beverage Processing sector added 55 fewer jobs than expected based on national industry and economic trends. Seafood Product Preparation and Packaging has a strong, positive competitive effect. Conversely, Dairy Product Manufacturing has a significant negative competitive effect.

Two subsectors in Massachusetts have employment concentration values above 1.0, Bakeries and Tortilla Manufacturing and Seafood Product Preparation and Packaging. Additionally, the average earnings per job in the sector are just over $75,000 annually.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	0.06	15	$69,426
Grain and Oilseed Milling	0.23	(376)	$115,924
Sugar and Confectionery Product Manufacturing	0.56	(267)	$53,847
Fruit and Vegetable Preserving and Specialty Food Manufacturing	0.45	248	$72,521
Dairy Product Manufacturing	0.44	(1,052)	$81,671
Animal Slaughtering and Processing	0.20	170	$90,886
Seafood Product Preparation and Packaging	4.53	1,235	$85,265
Bakeries and Tortilla Manufacturing	1.40	(391)	$60,270
Other Food Manufacturing	0.71	(79)	$91,381
Beverage Manufacturing	0.87	442	$80,668
Total Food and Beverages	**0.69**	**(55)**	**$75,307**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

Overall, Massachusetts's employment concentration for the sector is 0.69, meaning employment in Food and Beverage Processing is less concentrated in Massachusetts than in the US on average. Three industries have an employment concentration higher than 1.5: Seafood Product Preparation and Packaging; Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing; and Retail Bakeries. The Seafood Product Preparation and Packaging subsector is slightly more concentrated in Maine than in Massachusetts. The Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing and Retail Bakeries subsectors are significantly more concentrated in Massachusetts.

Massachusetts Industries with Employment Concentration >1.5, 2023 (6-Digit)

Description	Massachusetts	Maine
Seafood Product Preparation and Packaging	4.53	4.69
Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	2.71	0.35
Retail Bakeries	2.01	1.46
All Food and Beverage Processing	**0.69**	**0.96**

Source: Lightcast, Camoin Associates

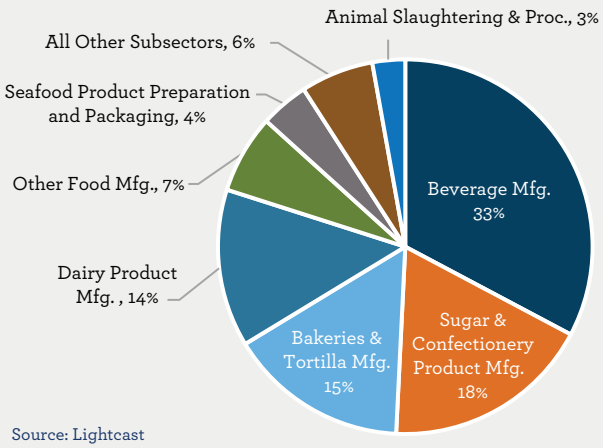
New Hampshire

Key Subsectors

In 2023, New Hampshire had 4,846 jobs in the Food and Beverage Processing sector. Beverage Manufacturing was the largest subsector in New Hampshire, with over 1,600 jobs and accounting for about 33% of the sector's total jobs.

Other significant Food and Beverage Processing subsectors in New Hampshire are Sugar and Confectionery Product Manufacturing and Bakeries and Tortilla Manufacturing, each accounting for under one-fifth of total sector employment.

New Hampshire Employment Distribution of Food and Beverage Processing Subsectors, 2023



Source: Lightcast

Employment Overview

In New Hampshire, the Sugar and Confectionery Product Manufacturing subsector has 899 jobs, which accounts for 27% of all Sugar and Confectionery Product Manufacturing jobs in New England. Other subsectors with strong representation in New Hampshire include Animal Food Manufacturing, Dairy Product Manufacturing, and Beverage Manufacturing.

New Hampshire's Food and Beverage Processing Sector experienced strong growth in the last five years, increasing 21% from 2018 to 2023, outpacing Maine and New England's total employment growth. Beverage Manufacturing experienced the strongest growth, adding over 800 jobs and outpacing the subsector's growth rate in Maine and New England.

New Hampshire's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	102	13%
3112	Grain and Oilseed Milling	3	0%
3113	Sugar and Confectionery Product Manufacturing	899	27%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	68	2%
3115	Dairy Product Manufacturing	679	11%
3116	Animal Slaughtering and Processing	141	3%
3117	Seafood Product Preparation and Packaging	208	4%
3118	Bakeries and Tortilla Manufacturing	775	4%
3119	Other Food Manufacturing	338	4%
3121	Beverage Manufacturing	1,634	10%
	Food and Beverage Processing	**4,846**	**7%**
	All Sectors	**764,456**	**9%**

Source: Lightcast

Regarding growth rates, Animal Food Manufacturing had the strongest five-year performance, increasing by 56% compared to a 14% decrease in Maine and a 17% increase in New England. Dairy Product Manufacturing grew by 18% in New Hampshire and decreased by 8% in both Maine and New England.

New Hampshire Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in Maine	% Change in New England
3111	Animal Food Manufacturing	61	102	41	67%	(20%)	20%
3112	Grain and Oilseed Milling	3	3	0	0%	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	835	899	63	8%	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	91	68	(23)	(25%)	(9%)	2%
3115	Dairy Product Manufacturing	557	679	122	22%	(5%)	(7%)
3116	Animal Slaughtering and Processing	89	141	52	59%	14%	28%
3117	Seafood Product Preparation and Packaging	233	208	(25)	(11%)	(9%)	29%
3118	Bakeries and Tortilla Manufacturing	667	775	108	16%	22%	7%
3119	Other Food Manufacturing	318	338	20	6%	(8%)	16%
3121	Beverage Manufacturing	1,158	1,634	476	41%	40%	35%
	Total Food and Beverages	**4,011**	**4,846**	**835**	**21%**	**14%**	**13%**

Source: Lightcast

GRP and GRP Per Job

The Food and Beverage Processing sector added over $772 million to New Hampshire's GRP in 2023, for an average of $159,347 per sector job. Overall, the sector's GRP per job is higher in New Hampshire than in Maine. In New Hampshire, the GRP per job in the Food and Beverage Processing sector is also higher than the GRP per job for all sectors in the state. The highest GRP per job is observed in the Sugar and Confectionary Product Manufacturing Subsector ($204,069), followed by the Dairy Product Manufacturing Subsector ($200,925).

GRP and GRP Per Job in New Hampshire's Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job	Maine GRP Per Job
3111	Animal Food Manufacturing	$10.4	$101,792	$148,333
3113	Sugar and Confectionery Product Manufacturing	$183.4	$204,069	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$4.8	$71,344	$112,537
3115	Dairy Product Manufacturing	$136.4	$200,925	$139,659
3116	Animal Slaughtering and Processing	$12.1	$85,734	$90,297
3117	Seafood Product Preparation and Packaging	$25.0	$119,927	$94,439
3118	Bakeries and Tortilla Manufacturing	$57.5	$74,273	$61,878
3119	Other Food Manufacturing	$50.7	$150,002	$121,273
3121	Beverage Manufacturing	$290.0	$177,494	$204,935
	Total Food and Beverages	$772.2	$159,347	$129,287
	Total All Sectors	**$104,268.0**	**$136,395**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Between 2018 and 2023, New Hampshire's competitive effect for the Food and Beverage Processing sector was +316, indicating that the state added 316 more jobs in the sector than would be expected based on national industry and economic trends. Sugar and Confectionery Product Manufacturing, Seafood Product Preparation and Packaging, and Beverage Manufacturing, have strong positive competitive effects. Conversely, Fruit and Vegetable Preserving and Specialty Food Manufacturing has a notable, negative competitive effect.

Three major subsectors in New Hampshire have an employment concentration value above 1.0. The most concentrated subsector is Sugar and Confectionery Product Manufacturing (2.45), followed by Seafood Product Preparation and Packaging (1.38), and Beverage Manufacturing (1.10). Meanwhile, the average earnings for jobs in the sector in New Hampshire total just over $80,000 annually.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	0.31	31	$47,725
Grain and Oilseed Milling	0.01	(0)	Insf. Data
Sugar and Confectionery Product Manufacturing	2.45	7	$109,703
Fruit and Vegetable Preserving and Specialty Food Manufacturing	0.09	(25)	$37,596
Dairy Product Manufacturing	0.91	53	$118,576
Animal Slaughtering and Processing	0.06	47	$59,163
Seafood Product Preparation and Packaging	1.38	(18)	$90,193
Bakeries and Tortilla Manufacturing	0.48	47	$54,663
Other Food Manufacturing	0.29	(30)	$79,124
Beverage Manufacturing	1.10	205	$67,046
Total Food and Beverages	**0.51**	**316**	**$81,035**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

New Hampshire's employment concentration for the sector is 0.51, meaning employment in Food and Beverage Processing is about half as concentrated in New Hampshire as in the US on average. Four industries have concentrations higher than 1.5. In New Hampshire, Chocolate and Confectionery Manufacturing from Cacao Beans and Fluid Mild Manufacturing have higher employment concentrations compared to Maine.

New Hampshire Industries with Employment Concentration >1.5, 2023 (6-Digit)

Description	New Hampshire	Maine
Chocolate and Confectionery Manufacturing from Cacao Beans	15.25	0.23
Fluid Milk Manufacturing	2.66	1.36
Frozen Cakes, Pies, and Other Pastries Manufacturing	2.48	3.48
Breweries	2.16	2.73
All Food and Beverage Processing	**0.51**	**0.96**

Source: Lightcast, Camoin Associates

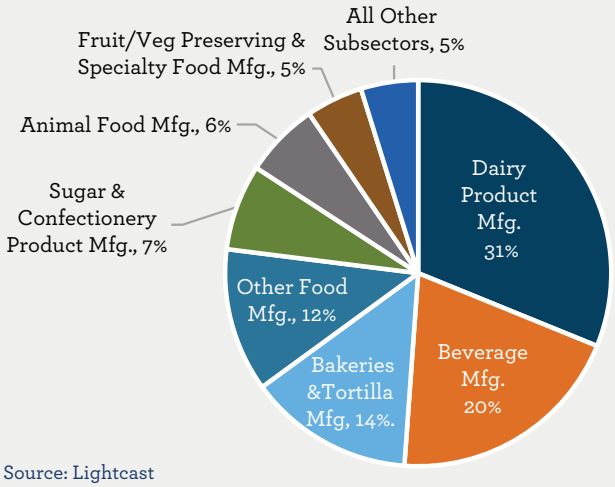
Vermont

Key Subsectors

In 2023, Vermont had 6,983 jobs in the Food and Beverage Processing sector. Dairy Product Manufacturing was the largest subsector in Vermont, with over 2,161 jobs and accounting for over one-third of total jobs for the sector.

Other significant Food and Beverage Processing subsectors in Vermont are Beverage Manufacturing and Bakeries and Tortilla Manufacturing, each accounting for 20% and 14% of total sector employment. Other food manufacturing includes snacks, coffee, tea, nuts, peanut butter, and other items.

Vermont Employment Distribution of Food and Beverage Processing Subsectors, 2023



Source: Lightcast

Employment Overview

Animal Food Manufacturing has the strongest share of total New England employment, at 55%. In Vermont, Food and Beverage Processing accounts for 10% of New England's Food and Beverage Processing.

Dairy Product Manufacturing and Sugar and Confectionery Product Manufacturing are other subsectors with strong representation in Vermont.

Vermont's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	435	55%
3112	Grain and Oilseed Milling	58	9%
3113	Sugar and Confectionery Product Manufacturing	499	15%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	330	8%
3115	Dairy Product Manufacturing	2,161	34%
3116	Animal Slaughtering and Processing	259	5%
3117	Seafood Product Preparation and Packaging	15	0%
3118	Bakeries and Tortilla Manufacturing	959	4%
3119	Other Food Manufacturing	834	9%
3121	Beverage Manufacturing	1,387	9%
	Food and Beverage Processing	**6,938**	**10%**
	All Sectors	**356,627**	**4%**

Source: Lightcast

Vermont's Food and Beverage Processing Sector has grown in the last five years, increasing by 6% from 2018 to 2023 but lagging both Maine and New England's total employment growth. Beverage Manufacturing experienced the strongest growth, adding over 375 jobs, and keeping pace Maine on a rate basis.

Regarding growth rates, Seafood Product Preparation and Packaging, as well as Beverage Manufacturing, had the strongest five-year performance compared to Maine and New England. Similarly, Fruit and Vegetable Preservation and Specialty Food Manufacturing grew by 26% in Vermont, declined by 9% in Maine, and grew by only 2% in New England.

Vermont Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in Maine	% Change in New England
3111	Animal Food Manufacturing	391	435	44	11%	(20%)	20%
3112	Grain and Oilseed Milling	62	58	-4	(6%)	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	420	499	79	19%	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	262	330	68	26%	(9%)	2%
3115	Dairy Product Manufacturing	2,118	2,161	44	2%	(5%)	(7%)
3116	Animal Slaughtering and Processing	232	259	27	12%	14%	28%
3117	Seafood Product Preparation and Packaging	1	15	14	1373%	(9%)	29%
3118	Bakeries and Tortilla Manufacturing	1,077	959	-118	(11%)	22%	7%
3119	Other Food Manufacturing	984	834	-150	(15%)	(8%)	16%
3121	Beverage Manufacturing	992	1,387	395	40%	40%	35%
	Total Food and Beverages	**6,539**	**6,938**	**399**	**6%**	**14%**	**13%**

Source: Lightcast

GRP and GRP Per Job

The Food and Beverage Processing sector added over $1.0 billion to Vermont's GRP in 2023, for an average of $146,103 per job in the sector. Vermont has a higher GRP per Job than Maine in four subsectors: Sugar and Confectionery Product Manufacturing, Dairy Product Manufacturing, Bakeries and Tortilla Manufacturing, and Other Food Manufacturing.

GRP and GRP Per Job in Vermont's Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job	Maine GRP Per Job
3111	Animal Food Manufacturing	$63.5	$146,000	$148,333
3112	Grain and Oilseed Milling	$10.0	$171,209	$262,963
3113	Sugar and Confectionery Product Manufacturing	$65.8	$131,814	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$31.0	$94,041	$112,537
3115	Dairy Product Manufacturing	$362.5	$167,725	$139,659
3116	Animal Slaughtering and Processing	$19.8	$76,452	$90,297
3117	Seafood Product Preparation and Packaging	$1.4	$93,175	$94,439
3118	Bakeries and Tortilla Manufacturing	$62.8	$65,465	$61,878
3119	Other Food Manufacturing	$118.5	$142,137	$121,273
3121	Beverage Manufacturing	$278.3	$200,661	$204,935
	Total Food and Beverages	**$1,013.6**	**$146,103**	**$129,287**
	Total All Sectors	**$40,909.2**	**$114,711**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Overall, Vermont's competitive effect for the Food and Beverage Processing sector was -470, indicating that the state added 470 fewer jobs in the sector from 2018-2023 than would be expected based on national industry and economic trends. Beverage Manufacturing and Fruit and Vegetable Preserving and Specialty Food Manufacturing have strong positive competitive effects. In contrast, Other Food Manufacturing and Dairy Product Manufacturing have notable negative competitive effects.

Six subsectors in Vermont have an employment concentration value above 1.0. Meanwhile, the average earnings per job in the sector in Vermont total over $67,000 per year.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	2.81	(22)	$86,728
Grain and Oilseed Milling	0.43	(8)	$83,935
Sugar and Confectionery Product Manufacturing	2.92	51	$64,798
Fruit and Vegetable Preserving and Specialty Food Manufacturing	0.90	61	$57,665
Dairy Product Manufacturing	6.24	(221)	$82,055
Animal Slaughtering and Processing	0.23	14	$53,716
Seafood Product Preparation and Packaging	0.21	14	$68,320
Bakeries and Tortilla Manufacturing	1.27	(216)	$45,174
Other Food Manufacturing	1.53	(305)	$70,410
Beverage Manufacturing	2.01	162	$59,046
Total Food and Beverages	**1.58**	(470)	**$67,775**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

Overall, Vermont's employment concentration for the sector is 1.58, meaning employment in Food and Beverage Processing is about 50% more concentrated in Vermont than in the US on average. Fourteen industries have a concentration higher than 1.5, including Coffee and Tea Manufacturing, Ice Cream and Frozen Dessert Manufacturing, and Frozen Cakes, Pies, and Other Pastries Manufacturing. For each of these, Vermont has a significantly higher employment concentration than Maine.

Vermont Industries with Employment Concentration >1.5, 2023 (6-Digit)

Description	Vermont	Maine
Coffee and Tea Manufacturing	10.54	1.05
Ice Cream and Frozen Dessert Manufacturing	9.10	0.84
Dry, Condensed, and Evaporated Dairy Product Manufacturing	9.01	0.00
Frozen Cakes, Pies, and Other Pastries Manufacturing	8.54	3.48
Fluid Milk Manufacturing	6.86	1.36
Confectionery Manufacturing from Purchased Chocolate	6.46	1.85
Other Animal Food Manufacturing	5.26	0.36
Cheese Manufacturing	3.98	0.21
Breweries	3.73	2.73
Distilleries	3.45	3.08
Breakfast Cereal Manufacturing	2.18	0.00
Fruit and Vegetable Canning	1.82	1.71
Flavoring Syrup and Concentrate Manufacturing	1.71	0.11
Cookie and Cracker Manufacturing	1.70	0.26
All Food and Beverage Processing	**1.58**	**0.96**

Source: Lightcast, Camoin Associates

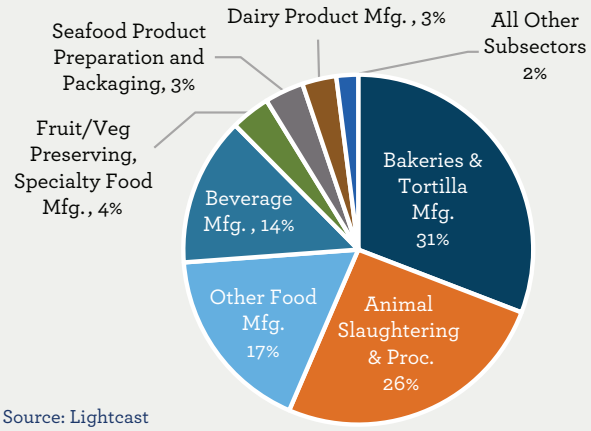
Rhode Island

Key Subsectors

In 2023, Rhode Island had 4,884 jobs in the Food and Beverage Processing sector. Bakeries and Tortilla Manufacturing was the largest subsector in Rhode Island, with over 1,506 jobs and accounting for around one-third of the sector's total jobs.

Other significant Food and Beverage Processing subsectors in Rhode Island are Animal Slaughtering and Processing (26%), Other Food Manufacturing (17%), and Beverage Manufacturing (14%). Other food manufacturing includes snacks, coffee, tea, nuts, peanut butter, and other items.

Rhode Island Employment Distribution of Food and Beverage Processing Subsectors, 2023



Source: Lightcast

Employment Overview

Animal Slaughtering and Processing has the strongest share of total New England employment in the sector, at 24%. Food and Beverage Processing in Rhode Island accounts for 7% of all food processing in New England.

Other subsectors with strong representation in Rhode Island are Other Food Manufacturing (9%) and Bakeries and Tortilla Manufacturing (7%). Overall, these subsectors have similar shares as the total for all sectors in Rhode Island.

Rhode Island's Food Processing Sector Employment Overview, 2023

NAICS	Description	2023 Jobs	Share of New England
3111	Animal Food Manufacturing	0	0%
3112	Grain and Oilseed Milling	18	3%
3113	Sugar and Confectionery Product Manufacturing	80	2%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	178	4%
3115	Dairy Product Manufacturing	154	2%
3116	Animal Slaughtering and Processing	1,251	24%
3117	Seafood Product Preparation and Packaging	176	4%
3118	Bakeries and Tortilla Manufacturing	1,506	7%
3119	Other Food Manufacturing	849	9%
3121	Beverage Manufacturing	671	4%
	Food and Beverage Processing	**4,884**	**7%**
	All Sectors	**546,554**	**7%**

Source: Lightcast

Rhode Island's Food and Beverage Processing Sector has seen strong growth in the last five years, increasing 29% from 2018 to 2023 and outpacing Maine and New England's total employment growth. Animal Slaughtering and Processing experienced the strongest growth, each adding over 600 jobs, and also outpacing the growth in Maine on a rate basis.

Regarding growth rates, Animal Slaughtering and Processing, as well as Other Food Manufacturing, had the strongest five-year performance compared to Maine and New England. Similarly, Dairy Product Manufacturing grew by 2% in Rhode Island despite declining by 8% in Maine and New England.

Rhode Island Employment Growth in Food and Beverage Processing Subsectors, 2018-2023

NAICS	Description	2018 Jobs	2023 Jobs	Change (2018-2023)	% Change (2018-2023)	% Change in Maine	% Change in New England
3111	Animal Food Manufacturing	0	0	0	Insf. Data	(20%)	20%
3112	Grain and Oilseed Milling	43	18	-25	(58%)	54%	(34%)
3113	Sugar and Confectionery Product Manufacturing	80	80	0	1%	65%	1%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	162	178	16	10%	(9%)	2%
3115	Dairy Product Manufacturing	151	154	3	2%	(5%)	(7%)
3116	Animal Slaughtering and Processing	589	1,251	662	112%	14%	28%
3117	Seafood Product Preparation and Packaging	212	176	-35	(17%)	(9%)	29%
3118	Bakeries and Tortilla Manufacturing	1,379	1,506	128	9%	22%	7%
3119	Other Food Manufacturing	642	849	207	32%	(8%)	16%
3121	Beverage Manufacturing	530	671	142	27%	40%	35%
	Total Food and Beverages	**3,787**	**4,884**	**1,097**	**29%**	**14%**	**13%**

Source: Lightcast

GRP and GRP Per Jobs

The Food and Beverage Processing sector added over $522 million to Rhode Island's GRP in 2023, for an average of $107,075 per job in the sector. Compared to Maine, however, Rhode Island has a lower GRP per Job in nearly all subsectors.

GRP and GRP Per Job in Rhode Island's Food and Beverage Subsectors, 2023

NAICS	Description	GRP (Millions)	GRP Per Job	Maine GRP Per Job
3111	Animal Food Manufacturing	$0.3	$0	$148,333
3112	Grain and Oilseed Milling	$3.1	$170,423	$262,963
3113	Sugar and Confectionery Product Manufacturing	$4.7	$58,749	$77,920
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	$17.1	$96,461	$112,537
3115	Dairy Product Manufacturing	$16.5	$107,186	$139,659
3116	Animal Slaughtering and Processing	$125.1	$100,013	$90,297
3117	Seafood Product Preparation and Packaging	$21.6	$122,436	$94,439
3118	Bakeries and Tortilla Manufacturing	$96.8	$64,272	$61,878
3119	Other Food Manufacturing	$121.2	$142,864	$121,273
3121	Beverage Manufacturing	$116.4	$173,436	$204,935
	Total Food and Beverages	**$522.9**	**$107,075**	**$129,287**
	Total All Sectors	**$69,175.9**	**$126,567**	**$114,294**

Source: Lightcast, Camoin Associates

Subsector Competitive Characteristics

Overall, Rhode Island's competitive effect for the Food and Beverage Processing sector was +689, indicating that the state added 689 more jobs in the sector from 2018-2023 than would be expected based on national industry and economic trends. Animal Slaughtering and Processing, as well as Other Food Manufacturing, have strong positive competitive effects, while Grain and Oilseed Milling and Seafood Preparation and Packaging have notable negative competitive effects.

Three subsectors in Rhode Island had an employment concentration value above 1.0, Animal Slaughtering and Processing, Bakeries and Tortilla Manufacturing, and Other Food Manufacturing. Meanwhile, the average earnings per job in the sector in Rhode Island total over $62,000 per year.

Food and Beverage Processing Subsector Characteristics, 2023

Description	Employment Concentration	Competitive Effect	Avg. Earnings per Job
Animal Food Manufacturing	0.00	(0)	$0
Grain and Oilseed Milling	0.09	(28)	$79,351
Sugar and Confectionery Product Manufacturing	0.31	(5)	$28,134
Fruit and Vegetable Preserving and Specialty Food Manufacturing	0.31	12	$58,554
Dairy Product Manufacturing	0.29	(16)	$64,521
Animal Slaughtering and Processing	0.71	629	$67,643
Seafood Product Preparation and Packaging	1.64	(29)	$95,400
Bakeries and Tortilla Manufacturing	1.30	2	$50,079
Other Food Manufacturing	1.02	106	$72,910
Beverage Manufacturing	0.63	17	$63,398
Total Food and Beverages	**0.74**	**689**	**$62,526**

Source: Lightcast, Camoin Associates

Most Concentrated Food and Beverage Processing Industries

Rhode Island's employment concentration for the sector is 0.74, meaning employment in Food and Beverage Processing is about 3/4 as concentrated in Rhode Island as in the US on average. Five industries have concentrations higher than 1.5. For each of these, Rhode Island has a higher employment concentration than Maine, except for Seafood Product Preparation and Packaging.

Rhode Island Industries with Employment Concentration >1.5, 2023 (6-Digit)

Description	Rhode Island	Maine
Meat Processed from Carcasses	2.55	0.04
Perishable Prepared Food Manufacturing	2.53	0.84
Retail Bakeries	2.25	1.46
Roasted Nuts and Peanut Butter Manufacturing	2.00	0.00
Seafood Product Preparation and Packaging	1.64	4.69
All Food and Beverage Processing	**0.74**	**0.96**

Source: Lightcast, Camoin Associates

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Maine's Food Processing Infrastructure

Infrastructure Mapping

The following infrastructure mapping provides a map of Maine's food processing and related real estate infrastructure, covering food processing and cold storage facilities across the state. While we have identified preliminary opportunities for additional food and beverage processing facility areas, it will be important to conduct additional feasibility studies that specifically map utilities, watersheds, and major transportation infrastructure for specific sites that will support a successful facility.

Key Findings

→ Geographic Concentration of Food Processing Facilities

- Maine's food processing facilities are primarily clustered in southern and coastal regions, notably Portland, Augusta, and along the coast to Bar Harbor.
- Aroostook County and Bangor stand out as a significant area for food processing despite low population density, supported by key transportation corridors (I-95 and Route 1) and strong agricultural assets.

→ Food Processing Real Estate Market

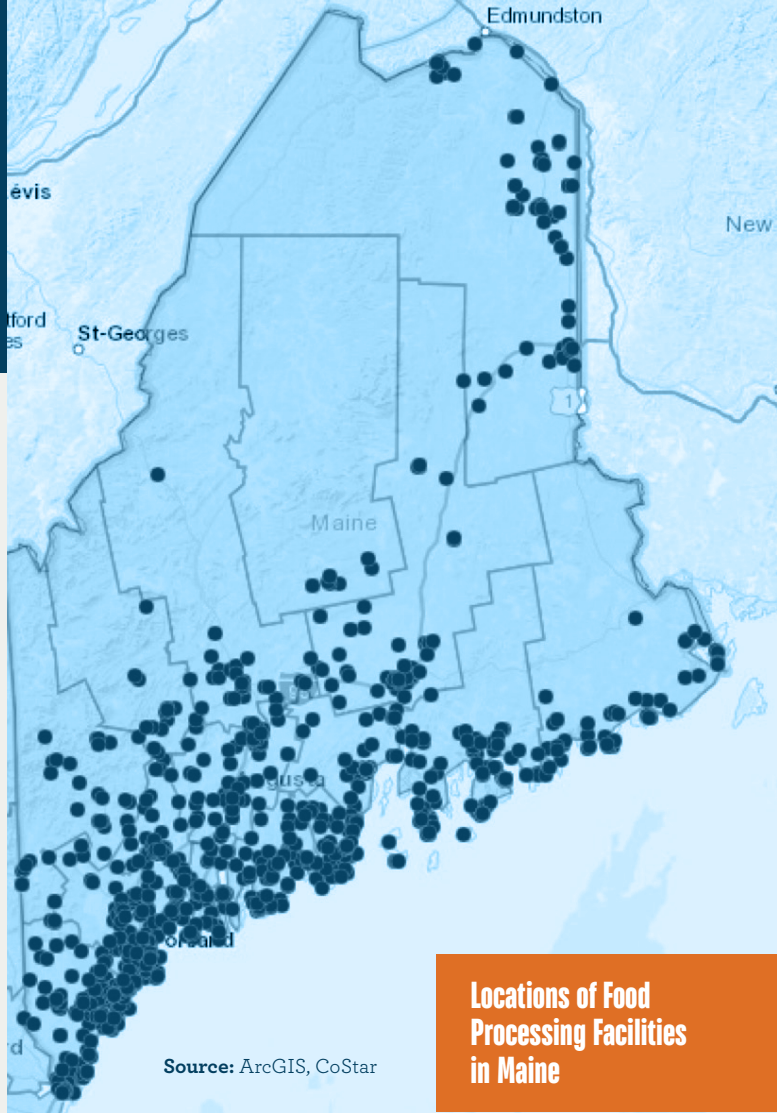
- Maine has 1.5 million square feet dedicated to food processing, with Cumberland and York counties hosting the majority of this square footage. However, limited new additions since 2015 and low vacancy rates reflect a tight market, suggesting demand may exceed available space.
- Some existing industrial real estate could be adapted to accommodate new food processing facilities, providing flexibility to meet sector needs. A notable challenge of renovating existing industrial real estate is finding a location with enough water and wastewater capacity to meet processing needs.

→ Potential for Expanding Food & Beverage Processing Capacity

- Maine's agricultural and marine resources, combined with transportation infrastructure, highlight growth potential for food processing facilities, particularly in underserved and rural areas. To expand processing in more rural areas of Maine, additional investments will be required to support building workforce pipelines for business development and expansion projects. Building workforce pipelines includes supporting wrap-around services like transportation, affordable housing, and childcare/eldercare programs.
- Investment in regions with agricultural strengths aligns with Maine's economic goals, indicating additional opportunities for high-value-added production.

Food Processing Facility Locations

The map depicts the distribution of food processing facilities across the state of Maine. **Facilities are densely concentrated in the southern and coastal regions of the state.** Notably, areas such as Portland, Augusta, and the coastal stretch between Portland and Bar Harbor show a high density of food processing plants. This concentration likely reflects the population density, infrastructure availability, and proximity to both raw materials and markets in these regions.



Source: ArcGIS, CoStar

Locations of Food Processing Facilities in Maine

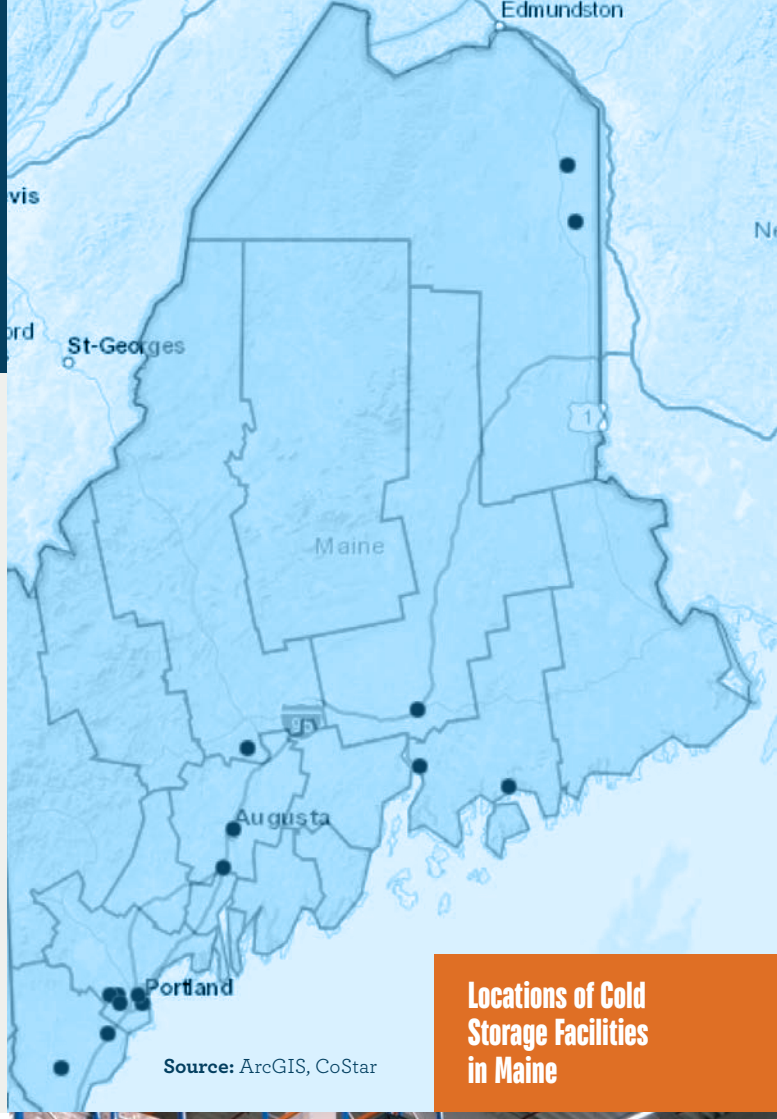
While the volume of food processing facilities is highest in the Southern half of the state and long the coastline, **the concentration of facilities in Aroostook County is significant, especially considering the county's low population density.** Facilities concentrated along I-95 and the Route 1 corridor lead the region to stand out as a strong performer in the Food Processing sector, especially considering its challenges such as low population and limited access to markets. Meanwhile, the region's existing assets such as strong agricultural production and availability of sites for industrial production help make it more attractive to potential food producers.

Throughout the state, factors such as the availability of raw agricultural and marine products, potential for regional economic development, and transportation infrastructure investment could make the state attractive for establishing new food processing plants. Developing facilities in underserved regions could help balance the economic development across the state and provide new employment opportunities in more rural areas. In particular, **expanding food processing in areas with strengths in agricultural production provides a critical opportunity to bring high value-added production from industries that fit well within the historical economic makeup of the region.**

Strategic investments and incentives to encourage the establishment of facilities in these regions could address current disparities and contribute to more balanced economic growth across Maine.

Cold Storage Facility Locations

The map illustrates the distribution of cold storage facilities across Maine. These facilities are primarily concentrated in the southern part of the state, particularly around Portland and extending towards Augusta. This clustering in the south is likely due to the higher population density, more developed infrastructure, and the proximity to major transportation routes, including highways and ports, which are essential for the efficient operation of cold storage facilities.



Source: ArcGIS, CoStar

Locations of Cold Storage Facilities in Maine

In contrast, the northern regions of Maine show a significant lack of cold storage facilities. This suggests a substantial opportunity for expansion in these areas. Establishing more cold storage facilities in the northern and rural parts of Maine could support local agricultural and fisheries industries by providing necessary storage solutions, reducing waste, and enhancing the supply chain efficiency for perishable goods.

Strategic investments in these areas would help balance the distribution of facilities and ensure more equitable access to essential storage services across the state.

This inventory of cold storage facilities does not include a new facility located at Maine Port Authority in Portland. The new facility is expected to be finished and operational in late 2024.

Industrial Real Estate Market Analysis

Before examining food processing and refrigeration/cold storage properties independently, the overall market trends for all industrial properties are provided. This is because it may be possible to convert existing industrial properties that are not currently used for food processing and/or refrigeration/cold storage into properties that are. According to CoStar, as of Q3 of 2024, the state had 67,127,392 square feet of industrial space spread across 2,191 buildings.

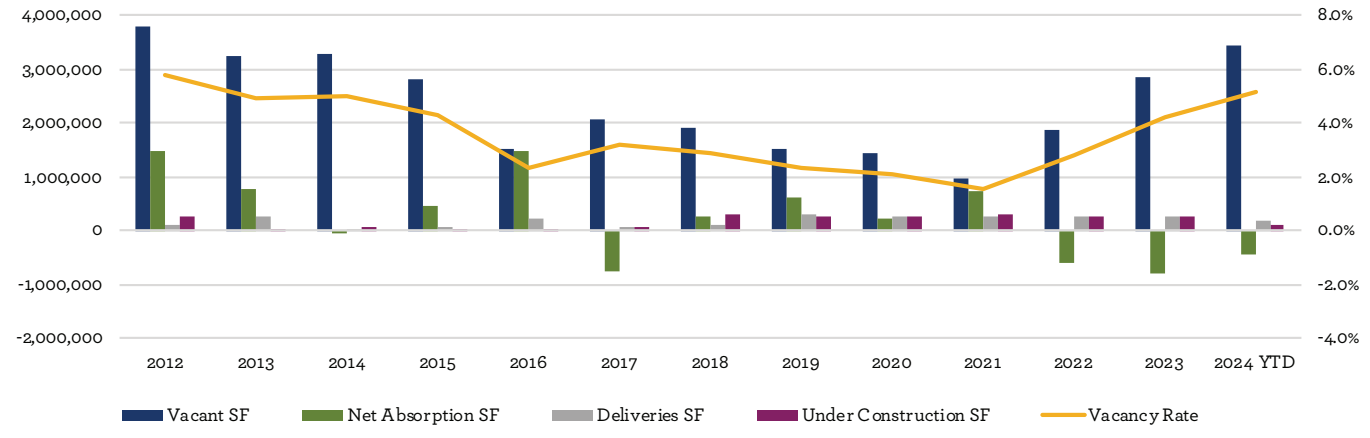
Maine's Industrial Real Estate Market Trends, 2012-2024

Period	Inventory Bldgs	Inventory SF	Vacant SF	Vacancy Rate	Net Absorption SF	Deliveries SF	Under Construction SF
2012	2,118	65,617,486	3,773,237	5.8%	1,470,398	104,186	255,815
2013	2,120	65,817,905	3,222,600	4.9%	751,056	255,815	31,061
2014	2,123	65,796,018	3,258,587	5.0%	(57,874)	31,061	74,039
2015	2,126	65,800,057	2,799,961	4.3%	462,665	74,039	31,627
2016	2,137	65,998,030	1,509,802	2.3%	1,488,132	221,513	9,600
2017	2,141	65,814,878	2,077,526	3.2%	(750,876)	41,848	50,565
2018	2,149	65,905,443	1,906,233	2.9%	261,858	90,565	315,009
2019	2,154	66,095,311	1,500,354	2.3%	595,747	305,622	239,428
2020	2,164	66,234,945	1,421,704	2.1%	218,284	250,263	248,036
2021	2,176	66,502,156	967,898	1.5%	721,017	267,211	297,648
2022	2,184	66,761,260	1,847,411	2.8%	(613,809)	266,448	272,731
2023	2,186	66,965,692	2,844,366	4.2%	(799,123)	249,032	239,431
2024 YTD	**2,191**	**67,127,392**	**3,441,642**	**5.1%**	(435,576)	**161,700**	**98,161**

Source: CoStar

Each year since 2018, over 150,000 additional square feet of industrial properties have been added in the state. Vacancy rates reached a ten-year low in 2021 before increasing over the last three years. Maine had negative net absorption of industrial space in 2022, 2023, and 2024 indicating that more space was vacated than newly occupied in these years

Industrial Real Estate, Maine, 2012-2024



Source: CoStar

Food Processing Real Estate Market Analysis

Based on the CoStar metrics alone, in 2024,[15] the state had 1,539,835 square feet of food processing real estate across 42 buildings. Seventeen of these buildings, over 40% of Maine's food processing real estate tracked through CoStar, were in Cumberland County. York County had the second largest share, with approximately 12% of the state's total. Most of the buildings were occupied by a single tenant.

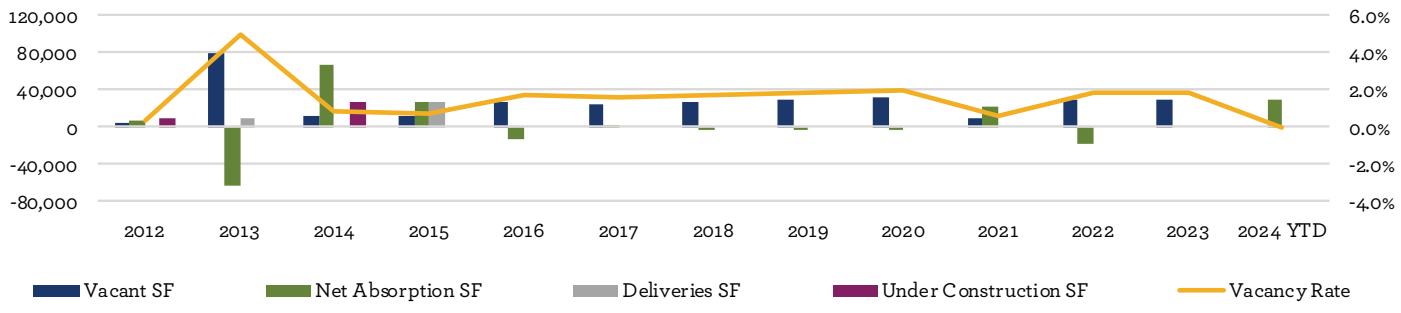
Maine's Food Processing Real Estate Market Trends, 2012-2024

Period	Inventory Bldgs	Inventory SF	Vacant SF	Vacancy Rate	Net Absorption SF	Deliveries SF	Under Construction SF
2012	40	1,556,667	5,100	0.3%	5,600	-	9,868
2013	41	1,566,535	78,274	5.0%	(63,306)	9,868	-
2014	41	1,566,535	11,875	0.8%	66,399	-	27,000
2015	42	1,593,535	11,875	0.7%	27,000	27,000	-
2016	42	1,593,535	26,300	1.7%	(14,425)	-	-
2017	42	1,593,535	25,400	1.6%	900	-	-
2018	42	1,593,535	26,314	1.7%	(914)	-	-
2019	42	1,593,535	29,177	1.8%	(2,863)	-	-
2020	42	1,593,535	31,814	2.0%	(2,637)	-	-
2021	42	1,593,535	9,542	0.6%	22,272	-	-
2022	42	1,593,535	28,500	1.8%	(18,958)	-	-
2023	42	1,593,535	28,500	1.8%	-	-	-
2024 YTD	**42**	**1,593,535**	**-**	**-**	**28,500**	**-**	**-**

Source: CoStar

Between 2012 and 2015, Maine added 36,868 square feet of food processing space and two additional buildings, a 2.3% expansion. Since the 2015 addition of 27,000 square feet, food processing real estate has remained stagnant at 1,539,835 square feet. From 2018 to 2020, food processing net absorption was negative, and the vacancy rate reached 2%. Net absorption spiked in 2024, and the vacancy rate fell to 0.0%. The low vacancy rates throughout the last decade (with 2013 being the notable exception) indicate that the vacant food processing real estate is limited in Maine. However, compared to cold storage real estate, food processing facilities are less specialized, and it may be possible to alter/convert existing industrial real estate properties to meet the needs of new food processing operations.

Food Processing Real Estate, Maine, 2012-2024



Source: CoStar

[15] While the mapping in the previous section includes additional properties, real estate market analytics are only available for properties tracked in CoStar.

Cold Storage Real Estate Market Analysis

Refrigeration and Cold Storage facilities are essential to processing and distributing perishable food and agricultural products. Maine has a limited number of these facilities. According to CoStar, as of 2024, the state had 667,383 square feet of cold storage spread across 12 buildings. Four buildings, nearly 40% of Maine's total cold storage real estate, were in Cumberland County. Kennebec County also had about 40% of the state's cold storage real estate in one, single-tenant building.

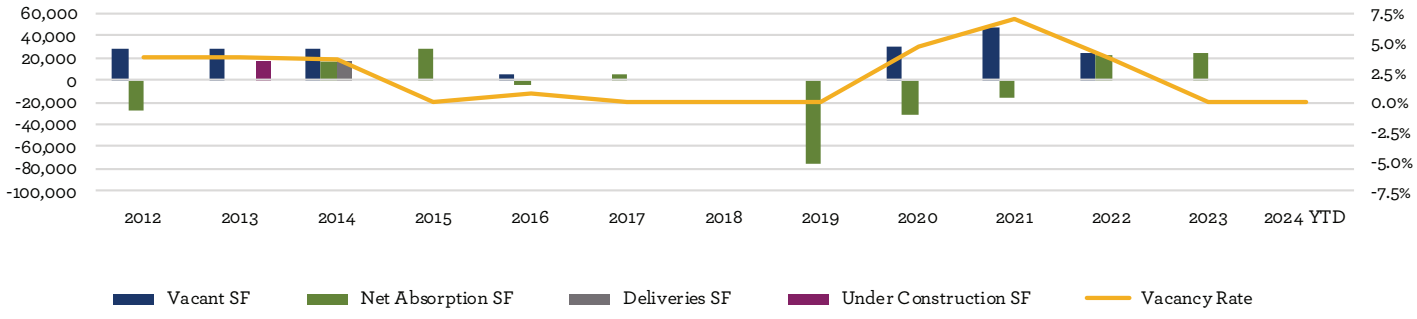
Maine's Cold Storage Real Estate Market Trends, 2012-2024

Period	Inventory Bldgs	Inventory SF	Vacant SF	Vacancy Rate	Net Absorption SF	Deliveries SF	Under Construction SF
2012	12	726,169	27,470	3.8%	(27,470)	-	-
2013	12	726,169	27,470	3.8%	-	-	16,200
2014	13	742,369	27,470	3.7%	16,200	16,200	-
2015	13	742,369	-	-	27,470	-	-
2016	13	742,369	5,148	0.7%	(5,148)	-	-
2017	13	742,369	-	-	5,148	-	-
2018	13	742,369	-	-	-	-	-
2019	12	667,383	-	-	(74,986)	-	-
2020	12	667,383	31,064	4.7%	(31,064)	-	-
2021	12	667,383	47,264	7.1%	(16,200)	-	-
2022	12	667,383	25,000	3.7%	22,264	-	-
2023	12	667,383	-	-	25,000	-	-
2024 YTD	**12**	**667,383**	-	-	-	-	-

Source: CoStar

In 2014, a 16,200-square-foot delivery increased the State's cold storage real estate by 2.2%. In 2019, however, demolishing a facility in Aroostook County decreased the state's supply by 10.1% or 74,986 square feet. Maine had almost no vacant cold storage real estate between 2017 and 2019. Net absorption between 2019 and 2021, however, spiked vacancy rates, which reached 7.1% in 2021. Net absorption increased and in 2022, vacancies declined to 3.7% before falling to 0% over the last two years. Maine's cold storage real estate is primarily concentrated in five buildings across two counties, and at least five of the state's 12 facilities are occupied by a single tenant. Together, these factors indicate a demand for additional, multi-tenant cold storage spaces. A new cold storage facility, the Maine International Cold Storage Facility located at Port Authority in Portland, is expected to be finished and operational in 2024.

Cold Storage Real Estate, Maine, 2012-2024



Source: CoStar

MAINE.
ECONOMIC & COMMUNITY DEVELOPMENT

Collaborative Efforts and People Behind the Industry

Collaborative Efforts for Small and Mid-Sized Producers

Any successful food system requires infrastructure to connect the businesses that produce food to markets and consumers who eat it. Large, private distribution and logistics companies can meet that need for medium- and large-scale food producers. However, these distribution methods have several key requirements that small producers are typically unable to meet, such as **large product volumes** and **hefty cash flows** to cover distribution prices.

As a result, **small food producers are often left with few options for distributing their products**, turning to time-consuming and sometimes costly channels. These channels often look like farmer's markets or on-site farm stores for farmers and food processors. Meanwhile, these businesses lack access to larger markets and institutional customers like schools and hospitals.

Collaborative models fill a critical gap that helps small and mid-sized food producers scale production, store goods, distribute products, market their brands, and more. The following section gives an overview of how these collaborative organizations and initiatives improve local and regional food economies. We start with Maine's collaborative food and beverage processing assets to illustrate where Maine is today before comparing it to other models around the nation.

These case studies highlight the essential role of collaborative and nonprofit-based models in empowering small and mid-sized producers to thrive in competitive markets. Their diverse approaches to infrastructure sharing, market creation, and business support contribute to sustainable regional food systems while helping small producers scale efficiently and effectively.

Maine's Collaborative Processing Assets

Maine has a growing inventory of critical assets that help fill these gaps and provide collaborative opportunities for small producers to scale and reach new markets. The following list, while not exhaustive, provides a few examples of collaborative organizations working to improve markets for farmers and food producers and facilitate increased access to local food products.

Fork Food Lab

https://forkfoodlab.com

Maine's only collaborative food processing center, Fork Food Labs, currently supports 80 small food businesses and is expanding to increase production capacity. The Phase 2 development will include a fruit and vegetable processing center, a USDA-certified meat production space, a flexible event space, and a pop-up restaurant space.

Mid Coast Hunger Prevention Program Community Kitchen

https://www.mchpp.org/community-kitchen

MCHPP's community kitchen aims to support equitable, just, and sustainable food systems by providing users with access to a certified commercial kitchen. It contains 700 sq ft of production space with an additional 700 sq ft of storage space. The kitchen is available on both a short-term and monthly membership basis and can be rented by community groups, non-profits, farms, and for-profit food businesses.

Real Maine

https://www.realmaine.com

Real Maine is a member-based marketing collaborative that promotes agricultural and food products made in Maine. Real Maine was created by the Maine Department of Agriculture and Conservation (DACF).

The Maine Lobster Marketing Collaborative

https://lobsterfrommaine.com/the-collaborative/

The MLMC is a marketing collaborative that was founded with the objective to grow demand for Maine Lobster. The Collaborative is comprised of harvesters, dealers, and processors.

Farm Drop

https://farmdrop.us

Farm Drop is an online farmer's market that allows customers to shop from multiple local farmers directly and pick up at one location. Farm Drop works to provide new markets to farmers, a year-round retail market for local foods grown in Maine, and makes it possible for small farms to collaborate in order to reach new customers.

Maine Marinara Collaborative

https://mainefarmtoinstitution.org/maine-marinara-collaborative

The Maine Marinara Collaborative (MMC) provides a creative solution that increases food processing capacity and provides an opportunity for farmers to increase sales by providing food to Maine institutions. The MMC works with partners to turn Maine-grown produce like tomatoes, onions, squash, and carrots into 3,000 gallons of sauce that is sold to 19 school districts across the state.

Daybreak Growers Alliance

https://www.daybreakgrowersalliance.com

The Daybreak Growers Alliance is a Maine-based distribution business that aggregates, markets, and distributes products from 70+ small farms and independently owned producers. The collaboration provides individuals and wholesale customers with year-round access to locally produced foods. Daybreak Growers Alliance offers several product options, such as subscription boxes, wholesale delivery, and more.

In Progress: Skowhegan Kitchen at 185

https://skowheganentrepreneurship.com/kitchen-at-185/

The Kitchen at 185 will be Maine's second shared kitchen and kitchen incubator space, located in Skowhegan. The facility will also offer a six-month incubator program that will help food startups gain valuable business basics to ensure the financial viability of their business, and expand opportunities for local workforce training at KVCC and the regional CTE program.

Case Studies: Collaborative Models in the US

The following section presents several case studies from throughout the US that provide insights into how other regions and organizations are working to close the distribution gap for small food producers, both farmers and food processors.

Summary of Collaborative Organizations Highlighted in This Section

	Vermont Food Venture Center	Western MA Food Processing Center	Red Tomato	Local Inland Northwest Collaborative
Area Served	Vermont & New Hampshire	Western MA + the Northeast	The Northeast	Inland Northwest (WA, ID)
Ownership	Nonprofit	Economic Development Corporation	Nonprofit	Cooperative ownership (farmer-owners)
Shared Kitchen	✓	✓		
Value-add processing	✓	✓		✓
Co-Packing		✓		
Shipping & Distribution	✓	✓	✓	
Aggregation and Retail				✓
Storage Space	✓	✓		
Business Advising	✓	✓		
Marketing			✓	

Nonprofit models are best suited to serve the targeted population of small and mid-sized producers. While private sector options are available, they are not likely to be financially viable if they are geared towards lower-volume food startups. Conversely, nonprofits are better suited to work with lower volume, and therefore with lower margins, and will be more likely to fill the critical gap in processing and distribution that is needed.

That said, various other models exist that can successfully serve small food businesses. Components such as shared kitchens, co-packing, shipping and distribution services, and business advising services can all be incorporated and adapted to meet the specific and unique needs of a region. The table above summarizes the models used by the four organizations highlighted in this section.

CASE STUDY:

The Vermont Food Venture Center

Connects Small Producers to Processing and Distribution Networks

LOCATION: VERMONT

VFVC
Vermont Food Venture Center
A Program of the Center for an Agricultural Economy

Background: Vermont's food hub infrastructure has expanded rapidly in the last fifteen years. According to Vermont's Agency of Agriculture Food and Markets, the state's six food hubs in 2009 have ballooned to over 24 nonprofit community food hubs working to support and advance food systems throughout the state. A key component of food hubs is facilitating the aggregation and distribution of food produced by small- and medium-sized food producers.

These collaborative or shared-use distribution methods allow small producers to pursue options that require little capital investment and allow small producers with limited volume to access larger and more distant markets without needing to work through a more expensive private distributor.

One example of these food hubs is the Center for an Agricultural Economy (CAE) based in Vermont's Northeast Kingdom region. In addition to farm and food business advising, CAE provides several critical processing, distribution, and logistics services to small farmers and food processors, including:

- **VT Food Venture Center – Shared-Use Commercial Kitchen:** The Vermont Food Venture Center (VFVC) is a shared-use food hub, business incubator, and shared kitchen for entrepreneurs, farmers, and others to rent. The facility opened in 2011 in Hardwick, and includes:[16]

  - 15,000 total square feet of space
  - Three shared-use kitchens
  - 6,000 square feet of private space for two dedicated tenants
  - 5,000 square feet of storage, including cold and frozen storage

  The VFVC is now home to dozens of food businesses[17], that produce value-added food products for the retail market. Additionally, it hosts food safety trainings among other community-focused events and projects.

- **Just Cut - Farm-to-Institution Supply Chain:** Since 2012, this program has been working to connect farmers to institutional and individual customers by creating a market for produce, processing it at CAE, and selling and distributing it to institutional customers. Just Cut processes produce into processed ready-to-use products such as peeled, sliced, diced, or julienned vegetables such as carrots, beets, cabbage, and potatoes, as well as frozen blueberries.

[16] https://www.fccdc.org/wp-content/uploads/2024/08/FY24-WMFPC-Annual-Report.pdf

[17] https://fccdc.org/food_process_center/wp-content/uploads/2023/07/new-co-pack-pricing.pdf

In 2023, CAE purchased over 160,000 pounds of produce from 20 farms. It processed this produce at its own FDA-certified commercial kitchen and distributed it to 43 different institutions in 2 states using a network of local refrigerated delivery providers[18].

Just Cut is not a co-packer, as processing on contract for local farms proved challenging in its early operation. Instead, it aggregates products and processes them under the Just Cut label, prominently displaying farm sources in its packaging. This model allows farmers to focus on agricultural operations and provides an opportunity for their products to reach larger and institutional markets while collaboratively processing them into more shelf-stable packaged goods with higher value-added.

Additionally, the operation improves efficiencies and reduces waste. Over time, CAE has developed strategies that have doubled the shelf life of produce and increased total processing yield. For example, by developing a secondary product that repurposes the waste of core products, the overall processing yield on broccoli increased from an average of 53% to 76%.

Overall, Just Cut serves the main objectives: It increases access to local food, supports an additional market for local farmers' produce, and improves utilization of the VFVC.

- **Farm Connex** – Delivery and Freight Services: Farm Connex provides temperature-controlled freight support, aggregation services, and short-term storage to local food producers, including farmers, processors, beverage companies, and more.

  This infrastructure was incorporated into CAE's portfolio in 2020. It provides delivery service to small- and medium-sized producers that would otherwise face challenges in getting their products to market. Farm Connex collaborates with other food hubs and co-ops in Vermont, and operates in 12 of 14 counties in Vermont. Currently, routes include producers and commercial buyers in both Vermont and New Hampshire, allowing producers to reach larger and further markets than they would otherwise be able to access without this collaborative delivery service.[19]

WHY IT WORKS

The Center for an Agricultural Economy's services and assets build on each other to provide a holistic resource to food producers. It provides small producers access to shared production space as well as storage for ingredients and finished products. Meanwhile, Farm Connex facilitates more efficient distribution of food products than would otherwise be available, and Just Cut creates a new market for higher value-add food products.

[18] https://www.justcutcae.org/about

[19] https://www.farmconnex.hardwickagriculture.org/

CASE STUDY:

The Western Massachusetts Food Processing Center

is a Full-Service Facility for Businesses Looking to Scale

LOCATION: MASSACHUSETTS

Business Served: In FY24, the WMFPC served 97 businesses throughout Massachusetts and other Northeast states.[20]

Background: Noticing a significant number of food businesses and small farmers, the Franklin County Community Development Corporation opened the Western Massachusetts Food Processing Center (WMFPC) in 2001 to support entrepreneurs in the burgeoning regional food economy. Over the past 20+ years, the Center has supported over 450 businesses in starting new products, processing produce, and achieving the volume and scale necessary to access larger markets.

The WMFPC primarily operates as a facility with rentable production space, as a co-packer, and as a resource for business technical assistance services for food companies. Businesses can choose to co-pack products, rent shared space to produce their food products, or use a combination of both by hiring WMFPC production staff to help produce in a shared kitchen space.

The WMFPC works to help small food businesses scale up, helping them transform their small-scale processes into commercially viable, scaled processes that offer enough volume to grow their businesses. To achieve this goal, the Center offers the following services:

- **Prototyping and Product Development:** Small food producers can work with the WMFPC to develop recipes into commercial-scale formulas, select packaging, generate labels that are compliant with regulations, and execute a fully developed prototype of a new processed food product that can be scaled and sold.
- **Co-Packing:** Small food producers can work with the WMFPC as a co-packer, meaning that the business can provide the Center with all ingredients and packaging needed to produce the product, and the Center will carry out the processing and manufacturing activity with its own staff and its own equipment. Unlike other co-packing options, the WMFPC provides a significant opportunity to small producers because it does not have minimum batch sizes. The WMFPC has a per-day fee structure, charging $2,500 for a full 8.5-hour day or $1,500 for up to 4.5 hours.[21]

[20] https://www.fccdc.org/wp-content/uploads/2024/08/FY24-WMFPC-Annual-Report.pdf

[21] https://fccdc.org/food_process_center/wp-content/uploads/2023/07/new-co-pack-pricing.pdf

- **Value-Add Production – Preserve The Valley:** While some producers may be interested in co-packing or producing their own product recipes, the WMFPC also recognizes that there are many farms that may be interested in turning their produce into more shelf-stable products that extend the life of their harvest, without directly engaging in food processing. For these farmers, the Center has a suite of ready-to-go recipes. Farmers deliver produce like tomatoes, cucumbers, peppers, root vegetables, or berries, and the WMFPC combines it with other ingredients to produce shelf-stable or frozen products like pickles, sauces, jams and jellies, and more.
- **Ingredient & Finished Product Storage:** In addition to production capacity, the WMFPC offers frozen, cold, and dry storage. The center has 2,400 square feet of frozen and refrigerated storage as well as 3,000 SF of dry storage space. This makes it easy for businesses that either co-pack or use shared production space to store their products on-site.
- **Business Counseling & Technical Assistance:** The WMFPC is a valuable business resource and works to propel small food businesses into new markets. The Center offers a full suite of technical assistance and counseling, from writing business plans to navigating regulatory environments to offering a wholesale readiness program.
- **Other services offered:** Shipping & Receiving, Inventory Management

WHY IT WORKS

- **Caters to multiple types of producers at various stages:** Companies who want to produce their own products in shared space, businesses looking to scale up with co-packing, entrepreneurs seeking prototyping and product development, and farmers looking to turn their produce into shelf-stable products without needing to invest in elaborate processing capacity.
- **In one facility, multiple solutions:** Processing, storage, shipping & receiving, and business counseling without leaving the building.

CASE STUDY:

Red Tomato

Creates Markets for Small- and Mid-Size Producers throughout the Northeast

LOCATION: RHODE ISLAND

Background: Across the East Coast, Red Tomato has been building a market for local products by bolstering the regional supply of foods. The organization is a food distribution nonprofit focused on meaningful change in the food system and operates as a food hub that aggregates, markets, and sells fresh produce from small- and medium-sized farms throughout the Northeast. Red Tomato's mission is to bring transparency, sustainability, and equity to the food system.
Red Tomato was founded in 1997, and for almost 30 years has been connecting small and medium-sized farmers and producers to larger markets. Historically based in Massachusetts, it recently moved headquarters to Rhode Island.

Red Tomato was born out of the understanding that large-scale consolidation of food producers, distributors, and retailers creates extremely challenging conditions for small farmers, who struggle to keep up with the changing market conditions and price pressures that are created by large and growing global competitors. To address these challenges, Red Tomato has adopted several key programs to improve supply chain and logistics.

Asset-free Logistics Management Model: Red Tomato began under a conventional wholesale model, running a small warehouse and owning a fleet of trucks to support its own distribution operation. However, after a few years, the owners recognized that they could not compete with large-scale distributors and moved to an asset-free model. Today, Red Tomato instead operates as a logistics manager and has a network of farms and distribution partners.

Red Tomato's supply chain logistics operates with two key models:

- **Distribution Center Model:** Red Tomato aggregates produce, and with help from distribution partners, delivers full truckloads to centralized warehouses for key customers, such as Whole Foods and Roche Bros, who are then responsible for last-mile delivery. Sending full truckloads of produce to customers' warehouses keeps Red Tomato price-competitive while still paying growers fair rates. Under this model, Red Tomato essentially operates as a regional produce broker for small- and mid-sized farms.
- **Direct Store Delivery:** Starting in 2014, Red Tomato also began directly delivering to grocery stores. This allows flexibility to both deliver a wider range of produce and incorporate more personalized marketing and customer services for stores and consumers. Similarly, this model relies on aggregation and distribution partnerships, as Red Tomato does not own warehouses or

trucks. This model is slightly less efficient than delivering full truck loads to distribution centers but allows greater flexibility. Red Tomato provides direct store delivery to stores like Kings Market in New Jersey and Hannaford Markets in New England, offering over 50 different produce items through this distribution model.

Meanwhile, Red Tomato also improves the supply chain by creating and developing markets for produce. Examples of this market development include:

- **EcoCertified:** USDA organic certification can be an important designation for consumers as they decide what produce to purchase. However, becoming a certified organic producer is sometimes not feasible for Northeast orchards due to the region's unique weather and growing conditions. The EcoCertified fruit program, managed by Red Tomato, was created by farmers, scientists, advisors, and consumers to designate high-quality produce grown in ecologically friendly ways, like protecting pollinators, managing pests, and promoting soil and tree health. Red Tomato carries out the marketing and distribution of fruit grown with this certification. The EcoCertified program has certified 30+ orchards, covering 1,500+ acres of land. As of the 2023-2024 season, Ricker Hill Orchards, based in Maine, is certified by this collaborative marketing program.
- **Farm to School Program:** As wholesalers become more competitive, Red Tomato began the Farm to School Program as a way to help growers diversify and grow new markets. Launched in 2022, this program involves a partnership with a food service management service that works to increase local food consumption in schools. Through this program, Red Tomato distributed $118,070 of local and regional produce to K-12 schools in MA, CT, and RI, most of which was EcoCertified apples.

WHY IT WORKS

- Without needing to invest in heavy capital, Red Tomato manages logistics to aggregate products more efficiently than individual producers could do on their own, making them more competitive in larger markets.
- Red Tomato helps to create new markets in an increasingly competitive wholesale market through marketing efforts like the EcoCertified program as well as by connecting farms to institutional buyers.

CASE STUDY:

The Local Inland Northwest Collaborative,

a Worker- and Farmer-Owned Food Hub Building a Local Food System in the Inland Northwest

LOCATION: WASHINGTON

Background: Based in Spokane, WA, the Local Inland Northwest Collaborative (LINC) works in multiple ways to create markets for small local producers and grow the local food supply chain. LINC is a true cooperative in that it is owned by its workers, and additionally, the farmers it works with have the option to become farmer-owners. Today, LINC works directly with over 60 farmers and over 25 farmer-owners throughout the region, spanning an approximate 250-mile radius around Spokane.

LINC supports the local food system by organizing two farm-to-table market options:

- **LINC Box:** This is a subscription-based box model that closely resembles farm shares, or a Community-Supported Agriculture (CSA) program. However, instead of sourcing from one farm, this box program sources products across all 60+ participating farms and local producers. Subscribers can choose between three options: 1) A farm box, containing local produce, 2) a Ranch box, containing local meats, or 3) the Wine box, containing local wine. Subscribers can also add on locally produced foods like bread, cheese, mushroom, coffee, fish, and more.
- **LINC Market:** This is an online market where customers can purchase produce as well as processed food items like sauces, flour, breads, and beverages at wholesale. The Market allows individual customers as well as restaurants, grocery stores, and institutions to purchase locally produced foods, and meanwhile creates a new market for small farms throughout the region.

LINC Malt: A processing collaborative to create a market for local grains

In addition to these two local food purchasing options, LINC also operates LINC Malt, a malt processor that works to connect local grain farmers to the brewing and distilling market. Recognizing the growing brewing and distilling industry, LINC Foods was searching for a way to increase the use of local grains in the burgeoning industry that was focused on quality and innovation.

In 2016, LINC Foods launched its malting facility as a way to create a new regional market for grain growers. Today, LINC Malt works with several grain farms throughout Washington and Idaho to produce a wide variety of malts and grain products used in brewing and distilling.

WHY IT WORKS

LINC works to create new markets for small farmers in the Northwest. While its subscription boxes and online market make it easier for customers to directly access products, LINC Malt works to create an entirely new process that connects existing brewers and distillers to small grain producers, providing new opportunities for grain growers while also creating access to higher-quality, local malt for beverage manufacturers.

What We Heard

We interviewed food and beverage processors and organizations across the State of Maine to learn more about the challenges and opportunities for Maine food and beverage processors. Several key themes emerged after completing interviews.

Infrastructure and Facility Needs

- Small-scale and regional food production have specialized infrastructure needs like large volumes of water and wastewater systems. Additional needs to start a food and beverage processing business or scale up include shared kitchen spaces, equipment, cold storage, co-packing facilities, and connected transportation networks.
- Warehousing, cold storage, and shared cooperative facilities are limited, particularly for niche markets (e.g., halal meats, kelp), prompting USDA and local investments in infrastructure to address these needs.

Barriers for Small Producers and Startups

- There is a continued need for food testing across Maine and the shift towards testing at Cornell University creates additional barriers to food and beverage processors due to a rise in distance, time of testing, and cost associated with going out of state.
- Complex regulations, financial constraints, and logistical challenges hinder small producers from starting and scaling operations.
- Maine has support organizations that provide financial assistance and resources to help overcome challenges; however, there are capacity barriers for businesses to apply for financial and technical assistance.
- Navigating complex and irregular logistics, distribution, and transportation networks hinders the movement of food and beverage products out of the state, therefore slowing down potential scaling opportunities for businesses. This is particularly relevant to lower-density geographies that are further away from major transportation assets.

Collaboration and Cooperation

- There is a strong need for collaboration among producers and processors to share resources like equipment, facilities, and distribution networks, which helps reduce costs and improve efficiency.
- Cooperative models are effective, especially for small-medium sized producers and processors that have lower population densities, lower product volumes, and are further away from major transportation routes. This is a large opportunity for Maine businesses.
- Collaboration among farmers, nonprofits, and institutions is essential for providing culturally relevant and locally sourced foods to Maine and New England communities.

Emerging and Specialty Markets

- Niche markets such as halal meat, kelp, and upcycled foods are growing, however, supply chain gaps and competition with imports present challenges.
- There are growing initiatives focused on sustainable food production and value-added products, supporting market entry for small businesses with additional grants and funding opportunities. This is also driven by climate change and the need to adapt and innovate for a sustainable future.

Sustainability and Innovation

- Organizations prioritize sustainable practices like energy efficiency and food upcycling, with initiatives including solar loans and waste reduction efforts.
- Technological innovations (e.g., automated greenhouses) are essential but often too costly for small- and medium-sized farms and processors to implement. New technology, including processes and machines, need specialized skills to install, operate, and maintain the equipment over time.

Workforce and Skill Gaps

- Labor shortages are prevalent across the state, especially in specialty areas like halal, aquaculture, and meat processing.
- Workforce shortages are particularly challenging in less densely populated areas due to housing shortages, lack of childcare and eldercare support, and transportation options.
- Building workforce pipelines and investing in workforce development is necessary to support the skilled labor demands of food markets.

Maine Food Processors

Oxford

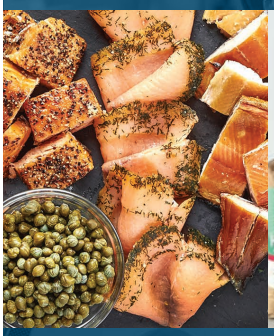
Waldo

Androscoggin

Cumberland

Piscataquis

Knox



Kennebec

Somerset

Franklin

Hancock

Business Name:

Allagash Brewing

Website: https://www.allagash.com/

County: Cumberland

Average Number of Employees: 140

Sector: Beer

History:

Rob Tod founded Allagash Brewing Company in 1995 with a vision to bring Belgian-style beers to the American market. Starting with a 15-barrel system he welded together, Rob brewed his first beer, Allagash White, a hazy, spice-infused wheat beer that gained a loyal following. Over the next decade, Allagash continued to innovate, winning medals and expanding its offerings to include barrel-aged beers. By the early 2000s, with the arrival of Jason Perkins—the brewery's current brewmaster—Allagash launched its first wild beer program and pioneered American-made Lambic-style brews.

Allagash's success led to steady expansion, with milestone events like the launch of a canning line in 2018 and achieving B Corp certification in 2019, emphasizing its commitment to social responsibility. Community engagement became a cornerstone, with initiatives supporting Maine-grown grain and clean water. Allagash White, now the world's most-awarded Belgian-style witbier, has garnered numerous medals over nearly three decades. By 2024, Allagash had earned acclaim as a top brewery, while Rob Tod's vision and dedication had firmly established Allagash as an innovative and celebrated name in American craft brewing.

Primary Sales Area:

National (21 States)

Distribution Channel:

Retail, Distributor, Wholesale |Tasting room in Portland, ME

Products:

Beer

Business Name:

Carrabassett Coffee Company

Website: https://shop.carrabassettcoffee.com/

County: Franklin

Average Number of Employees: 30+

Sector: Coffee

History:

Bob Luce, a Maine native, has transitioned from a career in the oil and propane industry to running Carrabassett Coffee Company as his retirement venture. Coffee, one of the top five global commodities, is sourced from around the world, including regions like Kenya, Tanzania, Ethiopia, and Brazil. Carrabassett Coffee Company roasts, flavors, and sells coffee across the US.

Bob took over the company, which now employs approximately 30 people across its main operation and two coffee shops in Sugar Loaf and Farmington. The business has seen significant growth in the past ten years and has outgrown its current facility and is expanding another 3,500 square feet in 2024. The COVID-19 pandemic significantly boosted their mail-order coffee sales, transforming their market reach nationwide. Since the pandemic, the business has doubled in size, and Bob continues to explore new opportunities.

Primary Sales Area:

Northeast & National Distribution | Serves coffee at Java Joes Corner Café (Farmington) and Java Joes Sugarloaf (seasonal)

Distribution Channel:

Retail (Mail-Order), Distributor, Wholesale

Products:

Single-origin coffee, Custom blend coffee, Flavored coffee, Decaf coffee, Tea

MOFGA Certified Organic

Business Name:

Ducktrap River of Maine

Website: https://ducktrap.com/

County: Waldo

Average Number of Employees: 150+

Sector: Seafood Processing

DUCKTRAP®
SMOKING SEAFOOD IS AN ART™

History:

Des Fitzgerald founded Ducktrap River Fish Farm in 1978 on a spot of land along the Ducktrap River and Kendall Brook in Lincolnville, Maine, where he began by raising trout for local markets and restaurants. After initial challenges with raising trout, he shifted to smoking trout and later expanded to smoking salmon, building a strong reputation and brand. Des moved to the

Belfast industrial park in 1990. Ducktrap developed a range of smoked seafood products, incorporating traditional European smoking methods and pioneering items like smoked mussels. Ducktrap grew rapidly, leading to a 2001 acquisition by Fjord Seafood and later a merger with another Norwegian salmon farming company, Marine Harvest in 2007. Marine Harvest changed its name to Mowi in 2019 and is currently one of the largest global salmon producers. With 125,000 square feet across two buildings, Ducktrap has grown from a small local smoker to a major player in the smoked seafood industry.

Primary Sales Area:
National

Distribution Channel:
Distributor, Wholesale

Products:
Cold smoked salmon, Lightly smoked salmon, Smoke roasted salmon & trout

Business Name:

Grandy Organics

Website: https://www.grandyorganics.com/

County: Oxford

Average Number of Employees: 38+

Sector: Snack Foods - Granola

History:

Grandy Oats, founded by Sara and Penny Carpenter in 1979, was established on the principle that businesses should focus on positive impact rather than profit alone. The company began its relationship with Whole Foods in 1981, initially selling in the Bread and Circus Store, and expanded after Aaron Anker joined in 2000. At that time, Grandy Oats was in seven Whole Foods and seven Hannaford stores, and the team was distributing products themselves. Diversification of products, increased brand awareness, and enhanced product development drove growth at Whole Foods, with distribution in over 200 stores within two years. Concurrently, a partnership with Hannaford's distribution center (PDI) expanded Grandy's reach to over 100 stores. Grandy Oats has scaled its production over the years, moving from hand-mixing small batches to using small mixers for roughly 250-pound batches, along with rotary ovens and modern packaging machinery. Their packaging speed has increased from 6 to 35 bags per minute. Today, Grandy Organics (name change in 2022) produces up to 17,000 pounds of granola and snack nuts daily and distributes nationwide. Grandy Organics' commitment to organic, fair trade, and sustainable growth is demonstrated by their renovations of current buildings and the supplementation of their electricity usage with 288 solar panels.

Primary Sales Area:

National

Distribution Channel:

Retail (mail order), Distributor, Wholesale

Products:

Grain-free granola, Granola, Trail Mix, Roasted Nuts

Business Name:

Heiwa Tofu

Website: https://www.heiwatofu.com/

County: Knox

Average Number of Employees: 10

Sector: Tofu

History:

Founded in 2008, this Rockport-based business focuses on producing a single product: super premium, firm tofu, available in two packaging options (retail and food service). The company began when Jeff, a former grower and high school science teacher, acquired equipment from a former tofu manufacturer (and high school science teacher) who was relocating. Initially operating out of a garage bay in Camden, the company moved to Coastal Farms Food Processing in Belfast in 2012, and later to its own facility in Rockport in 2016. All of Heiwa Tofu products are certified organic and all ingredients are sourced from Maine or New York.

Distribution began as a local effort, expanding gradually across Maine and the New England region, reaching markets like grocery stores, specialty grocers, healthcare, restaurants, colleges, K-12 schools, and farm stands.

Primary Sales Area:
Northeast

Distribution Channel:
Distributors

Products:
Tofu

MOFGA Certified Organic

KVH Kosher

Business Name:

Herring Brothers Meats

Website: https://www.herringbrothersmeats.com/

County: Piscataquis

Average Number of Employees: 37+

Sector: Meat Processing - USDA inspected

History:

With over a century in the meat industry, Herring Brothers traces its roots back to the early 1800s as one of the founding families of Guilford. The business, initially known as CH Herring Meats, began by family members slaughtering livestock for neighbors. By the mid-1940s, the family business evolved into Herring Brothers, with each generation building upon the legacy. In the 1980s, the business adapted to the changing market, shifting focus as dairy cow and hot dog processing plants moved out of state. From just five employees in 2000, it has grown to 37 today, specializing in custom processing for over 200 farmers, both local and out-of-state, who value locally sourced and humanely raised meats. Approximately 60-65% of their business is private labeling, meeting specific customer requests for beef, pork, lamb, and goat products. The addition of a smokehouse in 2000 enabled expansion into smoked products like kielbasa, snack sticks, and beef jerky. Technological advancements have been pivotal, enhancing product range and quality while positioning Herring Brothers as a trusted local supplier.

Primary Sales Area:

Northeast & National Distribution

Distribution Channel:

Retail, Distributor, Wholesale

Products:

Beef and pork, Roasting pigs, Steaks, Smoked & cooked products, Sausage, Wicked Good Beef Jerky

MOFGA Certified Organic

Business Name:

Kennebec Cheesery at Koons Farm

Website: https://kennebeccheesery.com/

County: Kennebec

Average Number of Employees: 25

Sector: Dairy

History:

Kennebec Cheesery at Koons Farm, located on over 100 acres in Sidney, Maine, handcrafts a variety of small-batch artisan cheeses and yogurt using milk from their pasture-raised, GMO-free Alpine and Saanen goats, alongside organic Jersey cows' milk from nearby Woodside Farm. The cheesery reflects family heritage with roots in New Zealand farming, bringing pastoral traditions and cheesemaking expertise to Maine. Since its licensing in 2008, Kennebec Cheesery has expanded its offerings from its signature chèvre to a wide selection including brie, feta, and hard cheeses, all made in small, solar-powered facilities designed for careful, hands-on production and aging. Run by head cheesemaker Jean Koons, a founding member of the Maine Cheese Guild, and her husband Peter, the farm is committed to sustainable practices such as composting and maintaining productive pastures. Their cheeses, crafted with care from a CAE- and CL-free herd, are sold at local farmers' markets, health food stores, and restaurants. Jean and Peter, who returned to Maine from New Zealand to bring their vision to life, believe strongly in supporting local farm economies as part of a sustainable future.

Primary Sales Area:

Maine & New England

Distribution Channel:

Retail & Wholesale

Products:

Goat Cheese, Cow Cheese, Yogurt, Cajeta

Business Name:

Maine Coast Sea Vegetables

Website: https://seaveg.com/

County: Hancock

Average Number of Employees: 20+

Sector: Sea Vegetables

History:

Founded in 1971 by Shep and Linnette Erhart in their farmhouse kitchen, Maine Coast Sea Vegetables became one of Maine's pioneering seaweed-based businesses, building a reputation for user friendly high-quality, organic sea vegetables. Inspired by the rich flavor of wild-harvested Atlantic Wakame (Alaria), the Erharts grew the business into a trusted brand known for its commitment to responsibly sourced seaweeds and reliable information. In 2012, the company began a strategic plan; ultimately transitioning to a custom-built facility in Hancock, Maine, and an employee-owned (ESOP) model, providing long-term employees a path to ownership and retirement flexibility. Today, with over 20 employee-owners, Maine Coast Sea Vegetables processes hundreds of thousands of pounds of dried seaweed annually. Committed to quality, safety and to build trust the company tests its products and adheres to organic certification standards, offering nutritious, minimally processed seaweed to customers across North America.

Primary Sales Area:

National

Distribution Channel:

Retail (mail-order), Distributor, Wholesale

Products:

Sea Vegetables (Seaweed Varieties); Alaria, Bladderwrack, Dulse, Irish Moss, Rockweed, Kelp , Laver, Sea Lettuce

USDA Certified Organic by OCIA

Business Name:

Maine Grains

Website: https://mainegrains.com/

County: Somerset

Average Number of Employees: 20+

Sector: Grain Milling

History:

The work behind Maine Grains, founded by Amber Lambke, began in 2007 with a new Kneading Conference, which highlighted the need for infrastructure to support local grain processing. Initially, it was thought that bakers weren't using local grains because they couldn't grow them in the area. However, it became clear that local grains like wheat, oats, rye, corn, and heritage varieties could indeed be grown, but there was a lack of facilities to clean and process them into human-grade ingredients. Maine Grains responded by converting a former jailhouse into a gristmill, transforming the town of Skowhegan into a hub for re-localizing grain economies. This innovative approach has positioned Skowhegan as a model for rural food hubs globally, inspiring communities to restore regional grain production and heritage seed use.

Maine Grains has milled 11,055,045 pounds of grain since 2012.

Primary Sales Area:

Northeast & National Distribution

Distribution Channel:

Retail, Distributor, Wholesale | The Miller's Table at Maine Gains is a farm-to-table café and bakery located in Skowhegan's Maine Grains gristmill.

Products:

Heritage grains, Stone ground flour, Beans

MOFGA Certified Organic

Business Name:

Passamaquoddy Wild Blueberry Co.

Website: https://www.pquoddyberries.com/

County: Washington

Average Number of Employees: 5

Sector: Fruit (Wild Blueberry Farm)

History:

The Passamaquoddy Wild Blueberry Company (PWBC), fully owned by a federally recognized tribe, has been harvesting premium wild blueberries on its 2,000-acre barrens for over 40 years, preserving a long-standing cultural tradition. This business, the largest Native American-owned wild blueberry farm globally, upholds the heritage of hand-picked blueberries—a practice rooted in the seasonal way of life of the Passamaquoddy and other Wabanaki tribes. Through the support of a USDA Value-Added Producer grant, PWBC was able to launch its own brand of frozen and freeze-dried blueberries. 100% of profits are reinvested for growth or benefitting the Tribe, ensuring a sustainable future for the Passamaquoddy community.

Primary Sales Area:

New England & National

Distribution Channel:

Retail (mail-order), Distributor, Wholesale

Products:

Frozen wild blueberries, Freeze-dried wild blueberries

MOFGA Certified Organic

Business Name:

Springworks Farm

Website: https://www.springworksfarm.com

County: Androscoggin

Average Number of Employees: 40

Sector: Vegetables & Fish

History:

Founded in 2014 while the founder, Trevor Kenkel, was a freshman at Bowdoin, Springworks Farm began with a 6,000-square-foot greenhouse and has since grown to become the largest organic lettuce greenhouse producer in the Northeast. After four phases of construction, Springworks now operates over 170,000 square feet of facilities, with plans to reach 700,000 square feet on its 170-acre site in the near term. With a focus on streamlined production, Springworks Farm produces approximately 5 million heads of lettuce and 160 metric tonnes of tilapia annually. Using organic fertilizer from its aquaculture systems, the farm grows high-quality romaine, green crispy, and bibb lettuces year-round, offering a fresh, delicious product to its customers. Springworks lettuce is sold in hundreds of locations throughout the Northeast via retailers like Hannaford and Whole Foods and food service distributors like Sysco.

Primary Sales Area:

Northeast

Distribution Channel:

Wholesalers & Distributors

Products:

Romaine Lettuce (Organic options), Boston Bibb Lettuce (Organic options), Green Crispy Lettuce (Organic options), Spring Mix (Organic options)

Appendix A: Data Tables

Maine's Food Processing Facilities, 2024

Address	City	State	Zip
68 Commercial St	Portland	ME	04101
46 Leighton Rd	Augusta	ME	04330-7706
258 Bartlett St	Lewiston	ME	04240
1 Beanpot Cir	Portland	ME	04103
229 Bomarc Rd	Bangor	ME	04401-2647
40 Brickyard Ct	York	ME	03909
250 Canco Rd	Portland	ME	04103
70 Custom House St	Portland	ME	04101
38 Evergreen Dr	Portland	ME	04103
364 Forest Ave	Portland	ME	04101
81 Goldthwaite Rd	Auburn	ME	04210-3811
38 India St	Portland	ME	04101
45 Industrial St	Waterville	ME	04901
50 Industrial Way	Portland	ME	04103
14 Lake Rd	Stockholm	ME	04783
64 Landry St	Biddeford	ME	04005
861 Lewiston Rd	Topsham	ME	04086-6034
805 Limestone Rd	Fort Fairfield	ME	04742
10 Locust St	Lewiston	ME	04240
150 Main St	Richmond	ME	04357
200 Main St	Gouldsboro	ME	04607
17 Merrill Dr	Rockland	ME	04841-2142
1 Milk St	Bangor	ME	04401
70 Mills Rd	Kennebunkport	ME	04046
56 Mussel Farm Rd	Saint George	ME	04860
20 New County Rd	Rockland	ME	04841-2113
86 Newbury St	Portland	ME	04101
349 Park Ave	Portland	ME	04102
46 Park Dr	Topsham	ME	04086
1300 Portland Rd	Kennebunkport	ME	04046
12 Portland Fish Pier	Portland	ME	04101-4620
60 Portland Pier	Portland	ME	04101
1-19 Spruce St	Lewiston	ME	04240
54 St John St	Portland	ME	04102
75 St John St	Portland	ME	04102
2 Stonewall Ln	York	ME	03909
107 Sugar Ridge Rd	Carrabassett Valley	ME	04947
525 Us Route 1	Freeport	ME	04032
92 Waldron Way	Portland	ME	04103
135 Walton St	Portland	ME	04103
276 Warren Ave	Portland	ME	04103
569 Wilton Rd	Farmington	ME	04938
48 Morningstar Rd	Houlton	ME	04730-3039

Source: CoStar

Appendix B: Data Sources

Lightcast (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales, from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. Click to learn more.

CoStar is a comprehensive source of commercial real estate intelligence, offering an inventory of over 6.4 million commercial properties spanning 135 billion square feet of space in 390 markets across the US. CoStar covers office, retail, industrial, hospitality, and multifamily markets. Property- and market-level data on absorption, occupancy, lease rates, tenants, listings, and transactions are researched and verified through calls to property managers, review of public records, visits to construction sites, and desktop research to uncover nearly real-time market changes. Click to learn more.

About Camoin Associates

As the nation's only full-service economic development and lead generation consulting firm, Camoin Associates empowers communities through human connection backed by robust analytics.

Since 1999, Camoin Associates has helped local and state governments, economic development organizations, nonprofit organizations, and private businesses across the country generate economic results marked by resiliency and prosperity.

To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on LinkedIn, Facebook, and YouTube.

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- Housing Needs Assessment
- Prospecting and Business Attraction
- Target Industry Analytics and Strategy
- Workforce Development and Talent Retention
- Entrepreneurship and Innovation