

2025 ANNUAL UPDATE

STATE OF DOMESTIC TRADE

MAINE.
ECONOMIC & COMMUNITY
DEVELOPMENT



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REPORT OVERVIEW

Macro Report Purpose

The Maine State of Domestic Trade Report¹ provides an annual update to the domestic trade tracking metrics used for progress reporting. It is intended to give a **high-level overview of Maine's trade activity**. Under the North American Industry Classification System (NAICS), industry classification

ranges from 2-digit industries (most broad) to 6-digit industries (most specific). This report focuses on the 2-digit industries to provide an overview of Maine's domestic and foreign trade on a macroeconomic level.

Introduction to Domestic Trade

Domestic trade refers to the trade Maine businesses engage in with other states in the United States. While other studies focus on foreign trade and the sales made to entities in other countries, **Maine's domestic trade efforts work to support the participation of Maine businesses in trade**

between other states. Domestic trade is important to grow Maine's economy, support entrepreneurship, create jobs, and improve infrastructure for a higher quality of life for all.

DEMAND

Demand refers to the amount of goods and services required by the state. This includes the amount of industry purchases across the nation.

It quantifies the value of goods and services purchased by Maine businesses that are used to produce goods and services.

Demand is either met by businesses located in Maine ("demand met in-region") or imported from businesses outside of Maine ("demand met by imports"). In this report, demand met by imports refers to purchases made from entities outside of Maine but located within the United States (i.e., excluding foreign imports).

Businesses in Maine **need** goods and services.



SALES

Sales refers to the total annual sales that Maine businesses make both to other industries and to consumers. **Maine businesses make sales to other entities within Maine (in-region sales) or to businesses and consumers outside of the state (exported sales).**

In this report, exported sales refer to sales made to entities outside of Maine but located within the United States (i.e., excluding foreign exports).

Businesses in Maine **are selling** goods and services.



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

EXECUTIVE SUMMARY

Economic Context



Between 2018 and 2023, **Maine's employment base grew, adding 26,759 jobs—a 4% increase.** This growth is on par with the national economy, which also grew by 4% during the same period.



Similarly, **Maine's Gross Regional Product (GRP)² growth is on par with that of the US.** Between 2022 and 2023, it increased from \$78.4 billion to \$83.8 billion, a 6.8% increase. The US Gross Domestic Product (GDP) grew by 6.9% in the same period.



Four sectors—Agriculture, Management of Companies and Enterprises, Retail Trade, and Construction—are **highly concentrated (LQ > 1.0)³ and have a positive competitive effect,⁴ indicating a strong competitive advantage.**

Of Maine's three largest sectors, Retail Trade is the only one with a high LQ and positive competitive effect, indicating statewide strength.

Trade



Domestic trade accounts for a significant share of sales in Maine.

Of Maine's \$184.5 billion in sales—dominated by the Manufacturing industry—\$102.7 billion was exported outside of Maine. Of all exported sales, \$99.7 billion—or 54% of total sales—went to domestic trade partners.



In 2023, Maine ranked 30th in the nation for demand met in-region, up from 34th in 2019. Maine's slow rise in this ranking over time **indicates increased sales for Maine-based companies.** This could be due to a more diversified state economy, enhanced in-state supply chains, and the state's ability to keep up with national trends.

² GRP measures the final market value of all goods and services produced in the region and indicates the state's overall productivity. At the national level, this is referred to as the GDP.

³ 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.

⁴ The competitive effect illustrates how much change in an industry is not explained by national economic or industry trends.

Opportunities



In Maine, the total sales value is growing faster than that of exported sales, indicating an increasing reliance on in-state sales (+6.6% compared to +5% between 2022 and 2023). While Maine has enhanced its in-state supply chains, it can **strengthen domestic export sales** by focusing on technical business support to establishments with key export products and promoting greater B2B sales.



Target sectors for support may include Manufacturing, Agriculture, and Professional and Technical Services:

- Manufacturing is one of Maine's most productive and largest sectors. Maine manufacturing experienced an increased volume of exported sales in the last year. Still, it saw a drop in its exported sales share, indicating increasing dependence on in-state sales and potential growth for domestic exports.
- Maine has an existing competitive advantage in Agriculture. Agriculture is also one of the state's fastest-growing sectors, with strong growth in exported sales. This implies the potential to enhance domestic exports by leveraging the sector's strengths.
- Professional and Technical Services saw the third-largest increase in GRP in the last year (+\$515 million or 10% year-over-year growth), following Government and Health Care and Social Assistance, which are not strong export sectors. Given this strong growth, there may be opportunities to strengthen the domestic trade of these services.



KEY STATISTICS FOR MAINE



JOBS

736,992

jobs in 2023

4%

job growth in
2018-2023

Compared to ...

4%

job growth in the
national economy



SALES

\$184.5B

in total sales in 2023



\$102.7B

in exported sales
(55.7% of total sales)



\$99.7B

exported to
domestic
trade partners
(54% of total sales)



DEMAND

\$186.3B

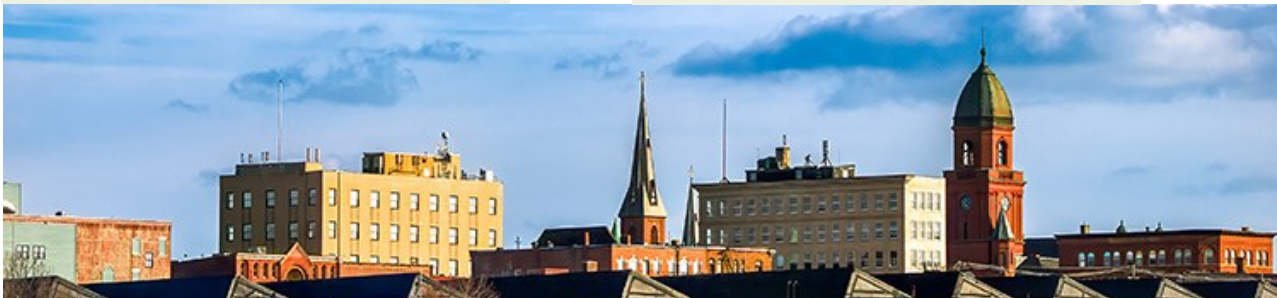
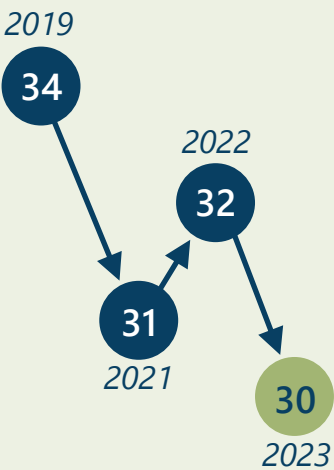
in total demand in 2023



\$94.5B

met by **Maine-made**
goods and services
(55.7% of total sales)

Maine's Rank for Demand Met In-State



CHANGES FROM 2021 TO 2023

Year-Over-Year Change: Sales

Since 2022, total sales have grown from \$173.1 billion to over \$184.5 billion, an increase of 6.6%.

The value of **sales exported out of state grew by 5%**, from \$97.7 billion in 2022 to \$102.7 billion in 2023, representing 55.7% of total sales. Of Maine's exported sales, \$99.7 billion went to other states, a 5.7% increase from 2022. Meanwhile, the value of sales to foreign entities declined by 14.3% in 2023.⁵

The value of **sales within the state grew by 8.5%** from \$75.4 billion in 2022 to \$81.8 billion in 2023. Since 2021, Maine's share of sales to entities within Maine has slowly increased, indicating room for export growth, which brings wealth to the state and connects the economy to national and global supply chains.

Year-Over-Year Change: Demand

Since 2022, total demand has grown from \$174.5 billion to over \$186.3 billion, an increase of 6.7%.

The value of demand met by imports increased from \$87 billion in 2022 to \$91.7 billion in 2023, a 5.4% increase. As seen with sales, this increase was entirely driven by domestic imports.⁶

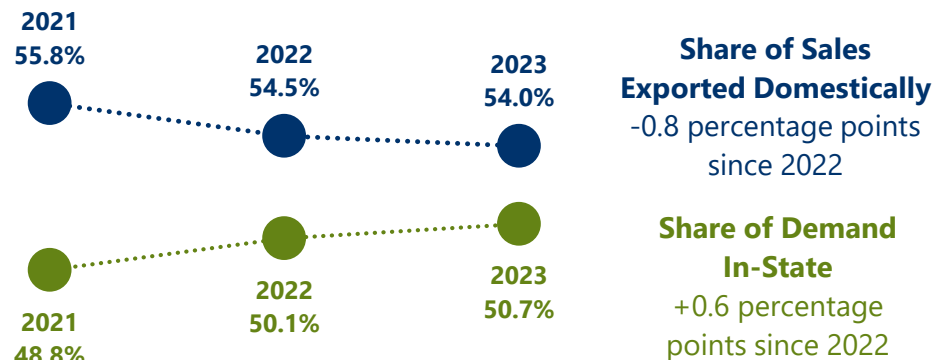
The value of demand met within the state increased from \$87.5 billion in 2022 to \$94.5 billion in 2023, an 8% increase. Since 2021, Maine entities have been able to meet more in-region demand, an indicator of strong B2B sales activity.

Sales and Demand Summary, 2021-2023

	2021	2022	2023	2022-2023 % Change
Total Sales	\$157.6B	\$173.2B	\$184.5B	6.6%
Sales In-State	\$66.5B	\$75.4B	\$81.8B	8.5%
Sales Exported Out of State	\$91.1B	\$97.8B	\$102.7B	5.0%
Foreign Exports	\$3.1B	\$3.5B	\$3.0B	(14%)
Estimated Domestic Exports	\$88.0B	\$94.3B	\$99.7B	5.7%
Total Demand	\$155.9B	\$174.5B	\$186.3B	6.7%
Demand Met In-State	\$76.1B	\$87.5B	\$94.5B	8.0%
Demand Met by Imports	\$79.8B	\$87.0B	\$91.7B	5.4%
Foreign Imports	\$6.4B	\$8.2B	\$7.3B	(11%)
Estimated Domestic Imports	\$73.4B	\$78.8B	\$84.5B	7.2%

Source: Lightcast, US Census Bureau, Camoin Associates

Share of Sales Exported Domestically and Demand In-State, 2021-2023



Source: Lightcast

⁵ This decline is partly driven by the decrease in Oil and Gas exports, which was Maine's top exported commodity by customs value in 2022.

⁶ Maine saw a year-over-year decrease in foreign imports by customs value for many commodities. The largest decrease in import value was for Petroleum Products.

HIGH-LEVEL SECTOR SUMMARY

Between 2018 and 2023, Maine's employment base grew, adding 26,759 jobs—a 4% increase. This growth is on par with the national economy, which also grew by 4% during the same period.

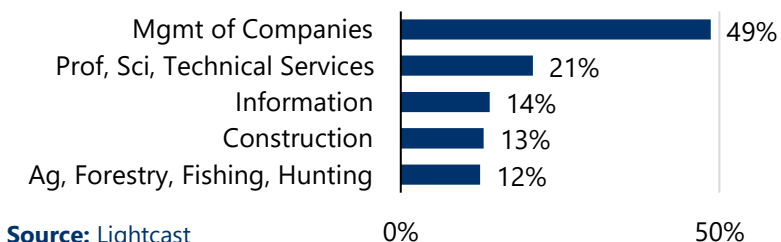
High Growth Sectors

Maine's job growth between 2018 and 2023 was driven by the **Professional, Scientific, and Technical Services** and **Construction** sectors, which grew by 6,935 jobs (+21%) and 5,838 jobs (+13%), respectively. The state's fastest-growing sector was Management of Companies and Enterprises,⁷ adding 5,419 jobs (+49%).

Only three sectors—Administrative Support and Waste Management, Other Services, and Wholesale Trade—contracted between 2018 and 2023. This indicates an improved economic trajectory compared to trends between 2017 and 2022 when nine sectors contracted.

Maine's Fastest Growing Sectors

Job Growth (%), 2018-2023



⁷ The Management of Companies and Enterprises sector includes holding companies and/or corporate, subsidiary, and regional management offices (for example, a company's headquarters). These establishments primarily engage in management activities and/or hold the securities or financial assets of companies and enterprises.

⁸ The Government sector includes all public administration and government institutions, including federal, state, and local government entities, public K-12 and postsecondary schools, public prisons, and federal military and civilian facilities.

Large Sectors

In 2023, Maine's largest sector by employment was **Health Care and Social Assistance**, accounting for 113,008 jobs. **Government**⁸ is Maine's second largest sector, accounting for 106,000 jobs. The third largest sector is **Retail Trade**, accounting for 86,313 jobs.

Maine's Largest Sectors

Total Jobs, 2023

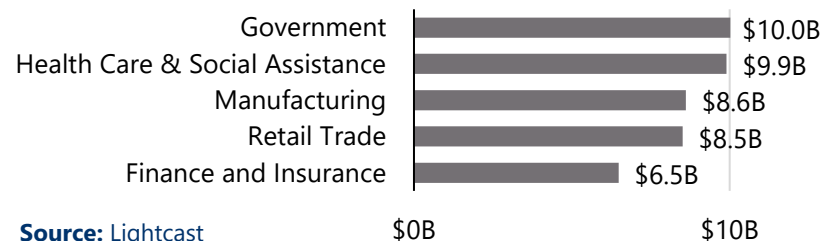


High Productivity Sectors

In 2023, Maine's two largest sectors—**Health Care and Social Assistance** and **Government**—were also the most productive, adding \$9.9 billion and \$10 billion to the state's Gross Regional Product (GRP), respectively. Though **Manufacturing** ranks fifth in size, it was the third largest contributor to Maine's GSP, adding \$8.6 billion.

Maine's Most Productive Sectors

Nominal GRP, 2023



COMPETITIVE ADVANTAGE

Four sectors—Agriculture, Management of Companies and Enterprises, Retail Trade, and Construction—are **highly concentrated (LQ > 1) and have a positive competitive effect, indicating a strong competitive advantage.** While Health Care and Social Assistance and Educational Services have a strong concentration, these sectors grew more slowly in Maine than in the US.

Agriculture, Forestry, Fishing, and Hunting remain the most concentrated sectors in Maine, with an LQ of 2.08.

This means it has two times the concentration of jobs that would be expected given the size of Maine's economy. This sector has outperformed growth expectations, with a competitive effect of 2,024 jobs.

Management of Companies and Enterprises is one of Maine's increasingly competitive sectors. It is also one of Maine's fastest-growing sectors, and its competitive effect of 4,444 indicates that this growth is due to local advantage. This sector is also highly concentrated, with an LQ of 1.52.

Professional, Scientific, and Technical Services has a low concentration but is one of Maine's emerging strengths.

Though this sector has an LQ of 0.78, it has a competitive effect of 2,093 and was Maine's second-fastest-growing sector between 2018 and 2023.

Competitive Advantage by Sector in Maine

NAICS	Description	2023 Location Quotient	2018-2023 Competitive Effect
11	Agriculture, Forestry, Fishing and Hunting	2.08	2,024
55	Management of Companies and Enterprises	1.52	4,444
44	Retail Trade	1.24	2,009
23	Construction	1.19	1,888
62	Health Care and Social Assistance	1.18	(6,220)
61	Educational Services	1.11	(763)
71	Arts, Entertainment, and Recreation	1.0	(198)
90	Government	1.0	(201)
31	Manufacturing	1.0	482
72	Accommodation and Food Services	1.0	(713)
52	Finance and Insurance	0.89	(559)
81	Other Services (except Public Administration)	0.89	(64)
54	Professional, Scientific, and Technical Services	0.78	2,093
56	Administrative and Support and Waste Management and Remediation Services	0.76	(3,087)
42	Wholesale Trade	0.75	(840)
53	Real Estate and Rental and Leasing	0.75	(328)
22	Utilities	0.74	125
51	Information	0.68	575
48	Transportation and Warehousing	0.63	(3,211)
21	Mining, Quarrying, and Oil and Gas Extraction	0.09	34
Total	All Sectors		(4,255)

Source: Lightcast

Note: Unclassified Industry is not shown in the table, but still contributes to the total competitive effect

The location quotient and the competitive effect help to illustrate what makes a region unique.

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.

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

CONCENTRATED INDUSTRIES

This analysis focuses on Maine's top 10 most concentrated industries. This analysis was done at the 6-digit NAICS code level, meaning these are subindustries of the sectors described previously. This offers a more detailed picture of Maine's current industry strengths.

Maine's most concentrated industries account for between 0.2% and 0.5% of the state's total jobs. Ship Building and Repairing is the largest of these industries, with 6,305 employees, driven by Bath Iron Works.

Maine's most concentrated industry is Shellfish Fishing, which has an LQ of 70.9. This means employment in Shellfish Fishing is 70 times more concentrated in Maine than in the rest of the US. Though Shellfish Fishing

accounts for 3,969 jobs or 0.5% of the state's total employment, Maine has a high level of specialization in this industry.

Six of Maine's 10 most concentrated industries are shrinking, including Footwear Manufacturing, Pulp Mills, and Paper Mills. Footwear Manufacturing, Maine's second most concentrated industry with an LQ of 21.6, lost 326 jobs between 2018 and 2023, a 21% decline. Targeted investment may help support Maine's legacy industry. Nationally, Footwear Manufacturing has been in decline for decades as operations move overseas.⁹

Most Concentrated Industries in Maine, 2023

Ordered from greatest to lowest 2023 LQ

Industry Description	High-Level Sector Description	2023 Jobs	2018 - 2023 Change	2018 - 2023 % Change	2023 Location Quotient
Shellfish Fishing	Agriculture, Forestry, Fishing and Hunting	3,969	3	0%	70.9
Footwear Manufacturing	Manufacturing	1,209	(326)	(21%)	21.6
Finfish Fishing	Agriculture, Forestry, Fishing and Hunting	1,055	(33)	(3%)	19.2
Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing	Manufacturing	1,361	663	95%	17.6
Pulp Mills	Manufacturing	329	(200)	(38%)	14.7
Ship Building and Repairing	Manufacturing	6,305	886	16%	14.0
In-Vitro Diagnostic Substance Manufacturing	Manufacturing	1,535	875	133%	11.3
Biomass Electric Power Generation	Utilities	108	(35)	(24%)	10.5
Paper Mills	Manufacturing	2,331	(244)	(9%)	10.4
Fish and Seafood Merchant Wholesalers	Wholesale Trade	1,263	(153)	(11%)	10.2

Source: Lightcast

⁹ Alina Selyukh, "Why the American Shoe Disappeared and Why It's So Hard to Bring it Back," NPR, June 19, 2019, <https://www.npr.org/2019/06/19/731268823/why-the-american-shoe-disappeared-and-why-its-so-hard-to-bring-it-back>



However, in 2024, New Balance announced its plans to close operations in Norridgewock, ME, and transfer those employees to an expanded facility in Skowhegan. This investment will add 200 new jobs,¹⁰ indicating some continued interest in Maine.¹¹

By contrast, Guided Missile Manufacturing, Ship Building and Repairing, and In-Vitro Diagnostic Substance Manufacturing are all highly concentrated in

Maine (LQs of 17.6, 14, and 11.3, respectively) and growing (+655, +886, and +875 jobs, respectively). Maine may have the potential to enhance its specialization in those industries further.

¹⁰ Construction of the expanded facility broke ground in 2023, so these 200 jobs are not reflected in the jobs data yet.

¹¹ William Hall, "New Balance Will Close Factory in Norridgewock, Consolidate in Skowhegan," Mainebiz, July 31, 2024, <https://www.mainebiz.biz/article/new-balance-will-close-factory-in-norridgewock-consolidate-in-skowhegan>

INDUSTRY MIX

Maine's Three Largest Sectors

1 Healthcare and Social Assistance is the largest sector in Maine, with 113,008 jobs in 2023. Its LQ is 1.18, indicating a stronger concentration in the sector than expected for a region of Maine's size. However, at 2% (+2,363 jobs), the sector's job growth between 2018 and 2023 was relatively slow compared to total job growth in the state. It contributed \$9.9 billion to the state's GRP in 2023. The average earnings per job was \$75,686 in 2023, higher than the state's average of \$70,527.

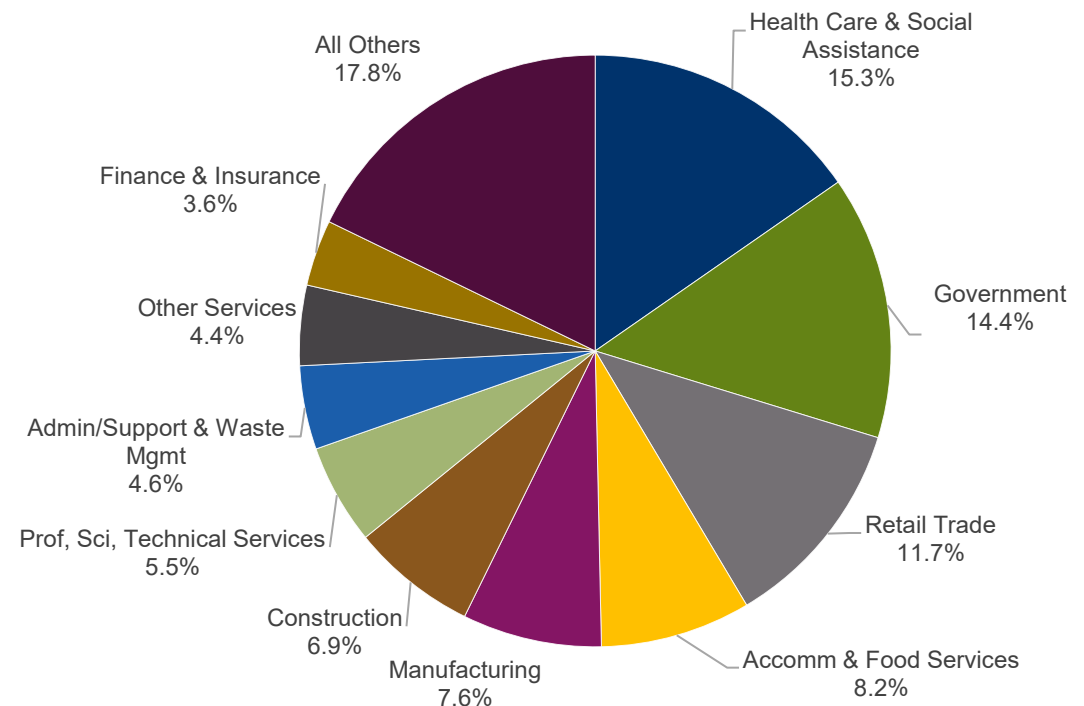
2 Government is the second largest sector, with 106,143 jobs in 2023. Its LQ is 1.00, indicating it is almost exactly as concentrated as expected. Government has also experienced slow job growth, adding 567 jobs between 2018 and 2023 (+1%). The sector's average earnings per job was \$78,910 in 2023, higher than the state's average. The sector contributed \$10 billion to the state's GRP in 2023.

3 Retail Trade is Maine's third-largest sector, with 86,313 jobs in 2023. The sector is relatively specialized, with an LQ of 1.24. It has experienced slow growth since 2018 (+891 jobs, a 1% growth rate) and has average earnings well under the State's average (\$46,508). In 2023, it contributed \$8.5 billion to Maine's GRP. Of Maine's three largest sectors, Retail Trade is the only one with a high LQ and positive competitive effect.

Agriculture, Forestry, Fishing, and Hunting account for about 2.4% of jobs; however, this sector's jobs are significantly underreported. More information on this sector can be found in *Maine's Food Sector: Industry Profile*.



Distribution of Jobs by Sector in Maine, 2023



Source: Lightcast

Note: Only the top 10 largest industries are displayed

¹² <https://www.maine.gov/decd/sites/maine.gov.decd/files/inline-files/Final%20Report%20-%20Master%20Food%20Sector%20-%20DECD.pdf>

GROSS REGIONAL PRODUCT CHANGES FROM 2022 TO 2023

Maine's nominal GRP was \$83.8 billion in 2023, growing by over \$5.3 billion (+6.8%) since 2022. In 2023, Maine's productivity was on par with the US. All major sectors experienced growth except Administrative and Support and Waste Management and Remediation Services, which

experienced a 6.6% decline in GRP. Within the private sector, Health Care and Social Assistance saw the largest growth in GRP by dollar value, growing by \$641.1 billion or nearly 7%.

Maine's High-Level Industries by Change in GRP Value, 2022-2023

Ordered by largest to smallest 2022-2023 change

NAICS	Description	2022 GRP	2023 GRP	2022-2023 Change	Maine % Change	US % Change
90	Government	\$9,339,872,195	\$10,022,476,532	\$682,604,337	7.3%	7.3%
62	Health Care and Social Assistance	\$9,263,015,858	\$9,904,152,169	\$641,136,312	6.9%	8.2%
54	Professional, Scientific, and Technical Services	\$5,148,189,362	\$5,663,583,672	\$515,394,310	10.0%	5.6%
44	Retail Trade	\$8,051,198,733	\$8,512,269,663	\$461,070,930	5.7%	3.3%
23	Construction	\$4,493,139,826	\$4,929,265,415	\$436,125,589	9.7%	8.4%
52	Finance and Insurance	\$6,055,048,230	\$6,488,571,395	\$433,523,164	7.2%	5.3%
72	Accommodation and Food Services	\$3,431,956,414	\$3,780,609,161	\$348,652,747	10.2%	9.9%
31	Manufacturing	\$8,272,494,811	\$8,615,914,443	\$343,419,632	4.2%	8.6%
51	Information	\$2,394,292,886	\$2,706,180,262	\$311,887,376	13.0%	7.7%
53	Real Estate and Rental and Leasing	\$3,263,452,484	\$3,515,787,460	\$252,334,976	7.7%	6.9%
55	Management of Companies and Enterprises	\$2,096,163,858	\$2,294,268,587	\$198,104,729	9.5%	4.0%
22	Utilities	\$1,220,116,220	\$1,410,773,409	\$190,657,189	15.6%	10.3%
42	Wholesale Trade	\$4,860,577,208	\$5,017,728,321	\$157,151,114	3.2%	8.1%
11	Agriculture, Forestry, Fishing and Hunting	\$2,096,281,583	\$2,237,635,659	\$141,354,076	6.7%	6.8%
81	Other Services (except Public Administration)	\$1,834,519,599	\$1,942,187,112	\$107,667,513	5.9%	6.1%
48	Transportation and Warehousing	\$1,941,003,534	\$2,045,576,823	\$104,573,289	5.4%	9.0%
61	Educational Services	\$1,154,654,230	\$1,240,960,240	\$86,306,010	7.5%	7.0%
71	Arts, Entertainment, and Recreation	\$821,144,925	\$901,436,021	\$80,291,096	9.8%	8.9%
21	Mining, Quarrying, and Oil and Gas Extraction	\$119,363,420	\$123,125,180	\$3,761,760	3.2%	8.2%
56	Administrative and Support and Waste Management and Remediation Services	\$2,587,594,499	\$2,417,079,695	(\$170,514,803)	(6.6%)	1.6%
Total		\$78,444,079,874	\$83,769,581,220	\$5,325,501,346	6.8%	6.9%

Note: GRP figures are regularly updated and historical figures in this report may differ from figures in previous versions of the report.

Source: Lightcast

Data Note on Tracking Gross Regional Product (GRP): GRP measures the final market value of all goods and services produced in the region and indicates the state's overall productivity. The GRP figures on this page refer to nominal GRP, meaning they have not been adjusted for inflation. The US Bureau of Labor Statistics and the US Bureau of Economic Analysis regularly update these figures.

SALES (REVENUE)

Exported sales (domestic and foreign) are important to the economy because they correlate with value-added production. This brings wealth to the state and connects the economy to national and global supply chains, creating opportunities across multiple sectors and subsectors.

In 2023, total sales (revenues) across all sectors in Maine was \$184.5 billion. Of these sales, 44% (\$81.8 billion) were sales to entities within Maine (in-state), while 56% (\$102.7 billion) were sales made to entities outside of Maine (exported sales). Exported sales include domestic sales and foreign sales.

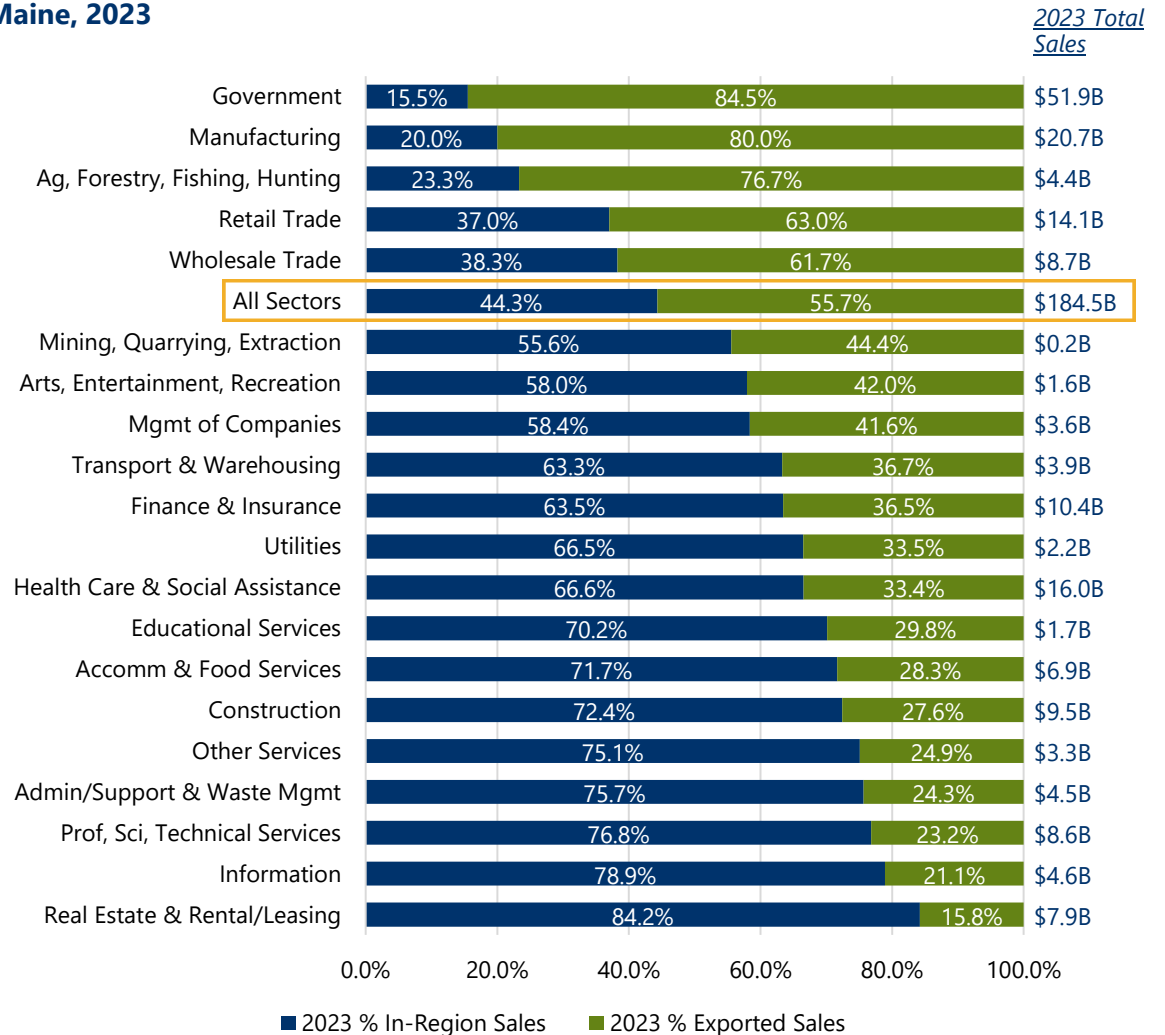
In the private sector, Manufacturing has the greatest exported sales volume. Exported sales in Manufacturing totaled over \$16.5 billion in 2023, accounting for 80% of total sales. Other sectors with high exported sales include Agriculture, Forestry, Fishing, and Hunting and Retail Trade.

Of the \$102.7 billion of sales exported out of Maine in 2023, 97% was exported to domestic trade partners. **This indicates that domestic sales have a stronger role in Maine's trade landscape.**

Change in Sales

Since 2022, total sales have grown to over \$184 billion, an increase of 6.6%.¹³ In the private sector, Agriculture, Forestry, Fishing, and Hunting experienced the largest growth rate in total sales (+\$844.3 million), followed by Other Services¹⁴ (+\$635.2 million) and Arts, Entertainment, and Recreation (+\$273.6 million).

Sales Split: Exported vs. In-State Sales, All High-Level Sectors, Maine, 2023



¹³ Total sales values were not adjusted for inflation.

¹⁴ The Other Services sector includes establishments that provide various services, such as equipment and machinery repair, grantmaking, advocacy, laundry services, or other personal care services. Within this sector in Maine, Automotive Repair and Maintenance had the highest sales value in 2023, followed by Personal Care Services.

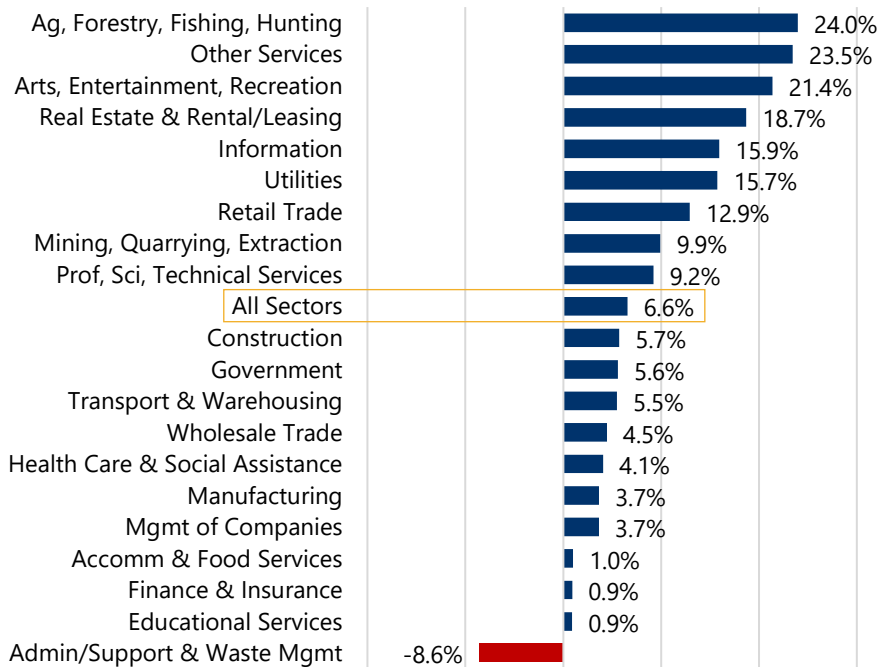


The only sector to experience a decline in total sales between 2022 and 2023 was Administrative and Support and Waste Management and Remediation Services (-\$423.1 million).

In the private sector, Retail Trade experienced the largest increase in sales by volume (+\$1.6 billion), followed by Real Estate and Rental/Leasing (+\$1.2

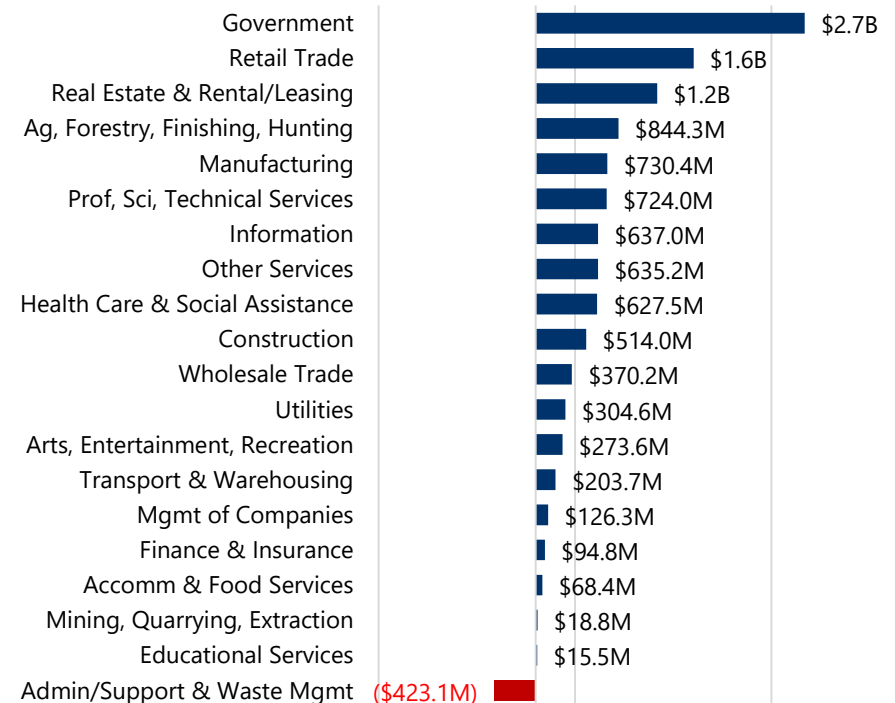
billion), Agriculture, Forestry, Fishing, and Hunting (+\$844.3 million), and Manufacturing (+\$730.4 million).

Percent Change in Total Sales by Sector, Maine, 2022-2023



Source: Lightcast

Change in Total Sales by Sector, Maine, 2022-2023

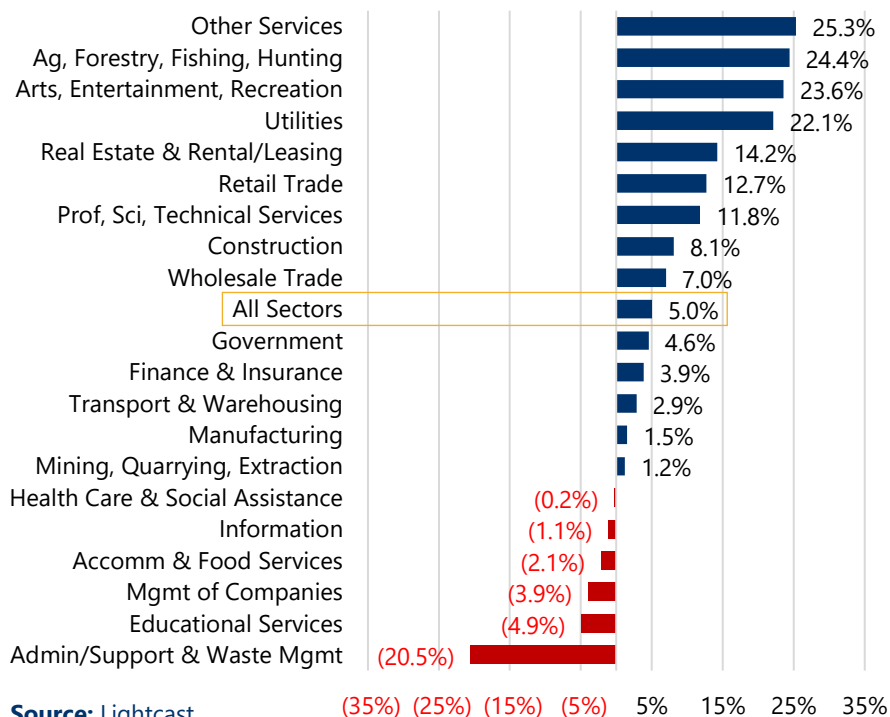


Source: Lightcast

Change in Exported Sales

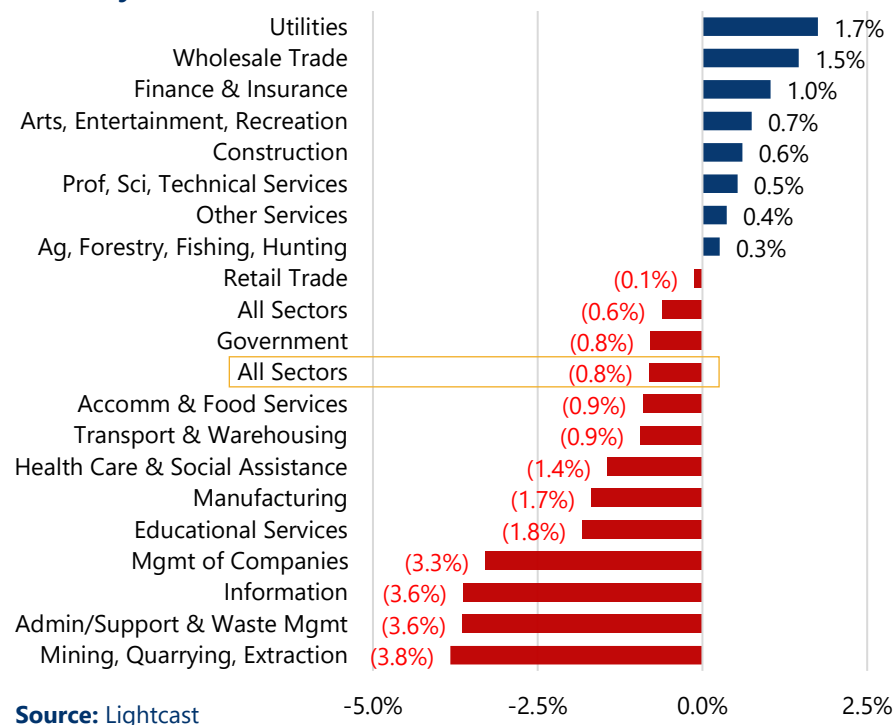
In Maine, the total sales value is growing faster than that of exported sales. The value of exported sales has grown by around 5%, from \$97.8 billion in 2022 to \$102.7 billion in 2023. As a result, the share of total exported sales decreased from 56.5% to 55.7%, indicating an increasing reliance on in-state sales in Maine.

Percent Change in Exported Sales by Sector, Maine, 2022-2023



While only six sectors saw their exported sales volume decline, over half saw their exported sales share drop between 2022 and 2023. Many sectors—Manufacturing, Transportation and Warehousing, Government, and Retail Trade—had a decline in their exported share of sales but still had an increase in exported sales value. These sectors still bring wealth—or new sales revenue from outside the state—to the state but increasingly rely on in-state sales.

Percentage-Point Change in Exported Share of Sales by Sector, Maine, 2022-2023



DEMAND (PURCHASES)

Demand met by imports signifies opportunities to increase sales for Maine companies by assisting them with in-state B2B sales and entering supply chains for other Maine companies.

In 2023, Maine entities purchased \$186.3 billion in inputs, products, and services. Of this demand, \$94.5 billion (50.7%) was purchased from Maine entities (in-region), while \$91.7 billion (49.3%) was met by imports (purchases from entities outside of Maine, both foreign and domestic).

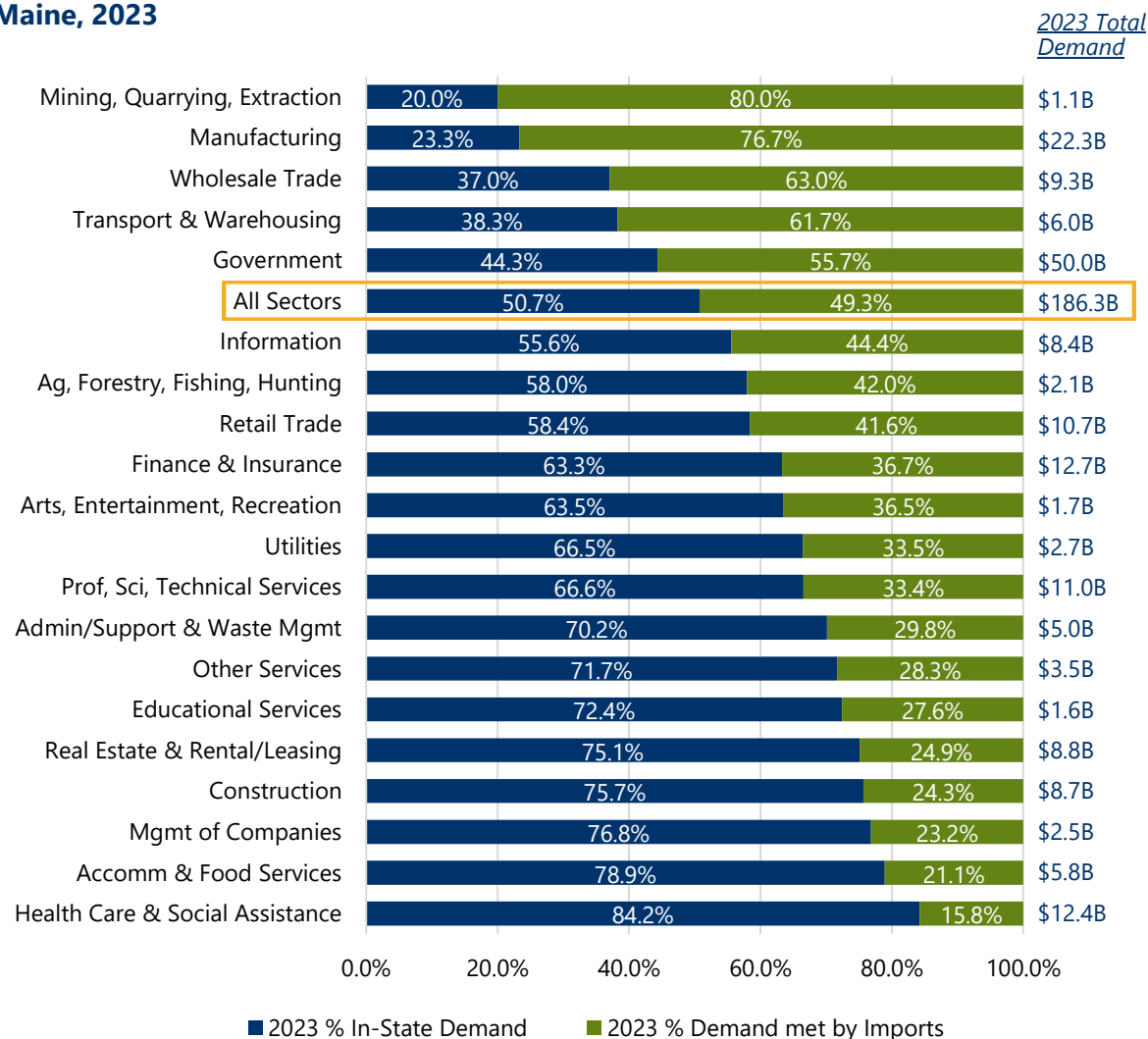
Government had the largest total demand in 2023, with \$50 billion in purchases. Manufacturing had the greatest demand volume within the private sector, with \$22.3 billion in purchases. Other sectors with high demand volumes include Finance and Insurance (\$12.7 billion) and Health Care and Social Assistance (\$12.4).

The industries with the highest percentage of demand met by imports include Mining, Quarrying, Oil, and Gas (80%, notably down from 90.1% in 2022), Manufacturing (76.7%, down from 81.9% in 2022), and Wholesale Trade (63%).

State Comparison

In 2023, Maine ranked **30th in the nation for demand met in-state**, compared to 32nd in 2022, 31st in 2021, and 34th in 2019. The share of demand met in-state is an important indicator of in-state B2B sales activity. Maine's

Demand Split: Imported vs. In-State Demand, All High-Level Sectors, Maine, 2023





slow rise in this ranking over time indicates increased sales within the state for Maine-based companies. This could be due to a more diversified state economy, enhanced in-region supply chains, consumers purchasing more from local businesses, and the state's ability to keep up with national trends.

The state with the greatest share of demand met in-region was California at 71.3%. California's high share of in-region purchases is likely due to the size of the state's economy. By contrast, the District of Columbia relies on imports the most, with only 32.3% of demand met in-region.

Demand Met In-State vs. Out of State by State, 2023

Ordered by highest to lowest share of demand met in-region

Rank	State	% Demand met In-State	% Demand met by Imports	Rank	State	% Demand met In-State	% Demand met by Imports	Rank	State	% Demand met In-State	% Demand met by Imports
1	California	71.3%	28.7%	18	Pennsylvania	56.5%	43.5%	35	Maryland	49.3%	50.7%
2	Texas	67.0%	33.0%	19	Tennessee	55.8%	44.2%	36	Alabama	48.8%	51.2%
3	Florida	64.6%	35.4%	20	Connecticut	55.5%	44.5%	37	New Mexico	48.7%	51.3%
4	Arizona	63.1%	36.9%	21	Nevada	55.2%	44.8%	38	Delaware	48.5%	51.5%
5	Colorado	63.0%	37.0%	22	Missouri	54.0%	46.0%	39	Iowa	48.0%	52.0%
6	New York	62.5%	37.5%	23	Wisconsin	53.8%	46.2%	40	Virginia	47.9%	52.1%
7	Massachusetts	62.3%	37.7%	24	Hawaii	52.1%	47.9%	41	Kentucky	46.9%	53.1%
8	Washington	61.6%	38.4%	25	New Hampshire	51.9%	48.1%	42	Montana	46.6%	53.4%
9	Illinois	61.4%	38.6%	26	Nebraska	51.6%	48.4%	43	Alaska	46.3%	53.7%
10	Utah	61.2%	38.8%	27	Idaho	51.5%	48.5%	44	Arkansas	46.1%	53.9%
11	Minnesota	60.6%	39.4%	28	South Carolina	51.3%	48.7%	45	Vermont	45.3%	54.7%
12	Georgia	59.2%	40.8%	29	Rhode Island	51.2%	48.8%	46	North Dakota	45.2%	54.8%
13	North Carolina	58.6%	41.4%	30	Maine	50.7%	49.3%	47	South Dakota	44.7%	55.3%
14	Ohio	58.3%	41.7%	31	Kansas	50.2%	49.8%	48	Mississippi	42.2%	57.8%
15	Michigan	58.0%	42.0%	32	Louisiana	50.1%	49.9%	49	Wyoming	41.0%	59.0%
16	New Jersey	57.5%	42.5%	33	Indiana	49.8%	50.2%	50	West Virginia	38.7%	61.3%
17	Oregon	57.4%	42.6%	34	Oklahoma	49.7%	50.3%	51	District of Columbia	32.3%	67.7%

Source: Lightcast

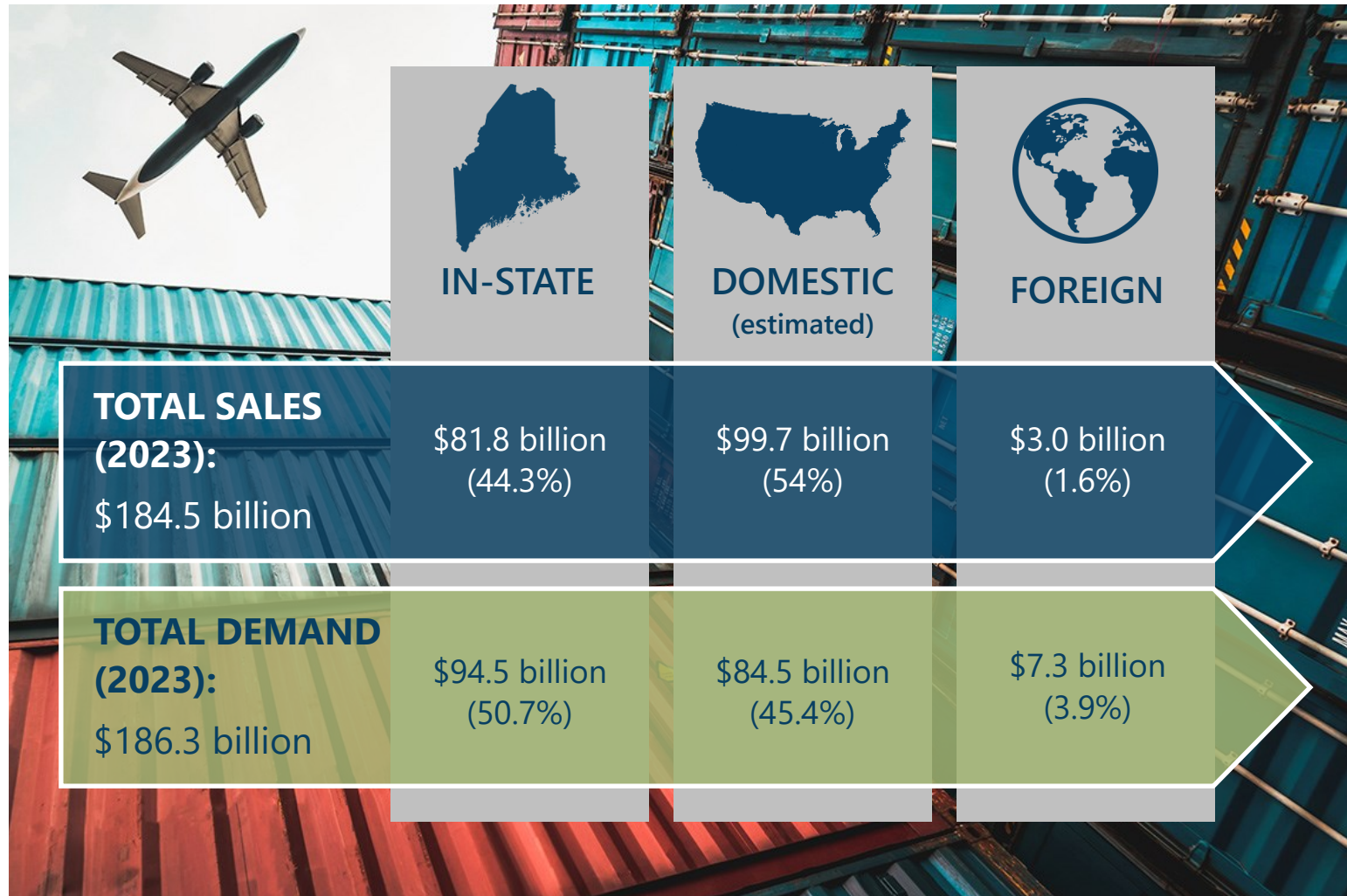
DEMAND, SALES, AND TRADE SUMMARY

Sales and Exports

Maine's total sales (revenue) amounted to \$184.5 billion in 2023. Of this total, \$102.7 billion is exported out of state, representing 55.6% of total sales. Most of Maine's exported sales are traded domestically. The state's foreign export value is estimated at \$3 billion, accounting for 1.6% of total sales. By this measure, Maine slightly lags the nation, which exports 3.8% of total sales to foreign entities.

Demand and Imports

Maine's total demand (purchases) amounted to nearly \$186.3 billion in 2023. Of this total demand, \$91.7 billion, or 49.2%, is met by imports from out of state. The value of foreign imports is estimated at \$7.3 billion, or 3.9% of total demand. The United States imported about \$3.1 trillion of goods in 2023, accounting for 6.2% of total demand.



Source: Lightcast, US Census Bureau

Note: Totals may not sum exactly due to rounding. Domestic trade values are estimated based on a combination of Lightcast data and US Census Bureau foreign trade data.

KEY TRADED COMMODITIES

Maine's Foreign Imports and Exports

Maine has a highly concentrated set of imported and exported products.

Maine's Top 25 Foreign Imports by Customs Value (2023)

Commodity	Total Import Value
Petroleum & Coal Products	\$2,935,478,901
Other Special Classification Provisions	\$380,787,051
Pulp, Paper & Paperboard Mill Products	\$287,713,861
Goods Returned (exports For Canada Only)	\$261,906,173
Apparel	\$245,383,192
Farmed Fish And Related Products	\$208,895,612
Fish, Fresh/chilled/frozen & Other Marine Products	\$199,952,231
Sawmill & Wood Products	\$147,694,174
Aerospace Products & Parts	\$141,238,074
Used Or Second-hand Merchandise	\$128,606,086
Ag & Construction & Machinery	\$127,223,994
Oil & Gas	\$116,336,624
Footwear	\$110,067,502
Other General Purpose Machinery	\$105,518,538
Plastics Products	\$100,457,381
Basic Chemicals	\$98,502,174
Navigational/measuring/medical/control Instrument	\$85,873,719
Animal Foods	\$69,734,627
Other Wood Products	\$64,842,411
Resin, Syn Rubber, Artf & Syn Fibers/fil	\$62,591,505
Industrial Machinery	\$61,017,540
Metalworking Machinery	\$56,717,376
Fruits & Veg Preserves & Specialty Foods	\$54,870,799
Converted Paper Products	\$54,587,309
Engines, Turbines & Power Transmsn Equip	\$49,299,594

Source: US Census Bureau

TOP IMPORTS



In 2023, Maine's top 25 foreign imports account for 85% of total imports into the state.

Petroleum and Coal Products were the state's largest imported products.



Maine's Top 25 Foreign Exports by Customs Value (2023)

Commodity	Total Export Value
Aerospace Products & Parts	\$379,419,952
Fish, Fresh/chilled/frozen & Other Marine Products	\$336,275,837
Pulp, Paper & Paperboard Mill Products	\$307,558,259
Semiconductors & Other Electronic Components	\$232,401,462
Oil & Gas	\$179,652,864
Pharmaceuticals & Medicines	\$163,824,326
Timber & Logs	\$124,642,732
Other Special Classification Provisions	\$92,123,464
Navigational/measuring/medical/control Instrument	\$89,684,536
Farmed Fish And Related Products	\$76,811,490
Fruits & Veg Preserves & Specialty Foods	\$70,090,237
Motor Vehicle Bodies & Trailers	\$46,851,916
Sawmill & Wood Products	\$45,213,763
Other Fabricated Metal Products	\$44,392,985
Waste And Scrap	\$43,945,465
Other General Purpose Machinery	\$42,827,768
Ag & Construction & Machinery	\$41,706,679
Electrical Equipment	\$40,296,215
Foods, Nesoi	\$39,494,874
Engines, Turbines & Power Transmsn Equip	\$37,558,388
Motor Vehicle Parts	\$31,933,924
Industrial Machinery	\$29,784,200
Plastics Products	\$28,942,846
Other Animals	\$27,708,754
Computer Equipment	\$23,616,557

Source: US Census Bureau

TOP EXPORTS



In 2023, the top 25 foreign exports accounted for 87% of the total.

Maine's largest exported products were Aerospace Products and Parts.



MAINE'S DOMESTIC IMPORT AND EXPORT TRENDS

Top Domestic Exports

In 2023, **paper from pulp** was Maine's largest domestically exported commodity, representing 8.8% of all domestic exports, an increase of 0.2 percentage points from 2022.

Ships, which held the top spot in 2022, ranked second, followed by **dimension lumber** as the third-largest export.

Maine's top 25 domestic exports together accounted for about 60% of total commodity exports, a share consistent with 2022, suggesting a moderately concentrated export base.



Maine's Top 25 Domestic Exports by Value (2023)

Commodity	Total Export Value
Paper from pulp	\$1,876,551,366
Ships	\$1,874,852,399
Dimension lumber	\$793,382,220
Pharmaceuticals	\$759,502,281
Sanitary paper products	\$645,806,999
Bottled and canned soft drinks and water	\$490,632,455
Boats	\$464,671,998
Other plastics products	\$435,534,437
Seafood products	\$401,454,158
Asphalt paving mixtures and blocks	\$399,312,759
Beer, ale, malt liquor and nonalcoholic beer	\$391,405,697
Semiconductors and related devices	\$380,755,798
Bread and bakery products, except frozen	\$364,715,183
Aircraft engines and engine parts	\$348,090,169
Frozen fruits, juices and vegetables	\$326,107,814
Distilled liquors except brandies	\$314,635,340
Medicines and botanicals	\$303,235,934
In-vitro diagnostic substances	\$300,154,516
Surgical appliance and supplies	\$293,357,957
Machined products	\$292,344,079
Canned fruits and vegetables	\$271,570,597
Reconstituted wood products	\$269,595,323
Fish	\$242,799,407
Printed circuit assemblies	\$228,955,344
Aircrafts	\$212,755,881

Source: IMPLAN

Note: Total Export Value is adjusted to 2025 dollars. List excludes service commodities.



Top Domestic Imports

Refined petroleum products represent the largest share of Maine’s domestic commodity imports at 9.5%. While this category also ranked first in 2022, its share was higher at 11.6%.

Automobiles and pharmaceuticals follow as the second- and third-largest import categories.

Altogether, Maine’s top 25 domestic imports make up about 43% of the state’s total domestic imports, a proportion similar to 2022.

Maine's Top 25 Domestic Imports by Value (2023)

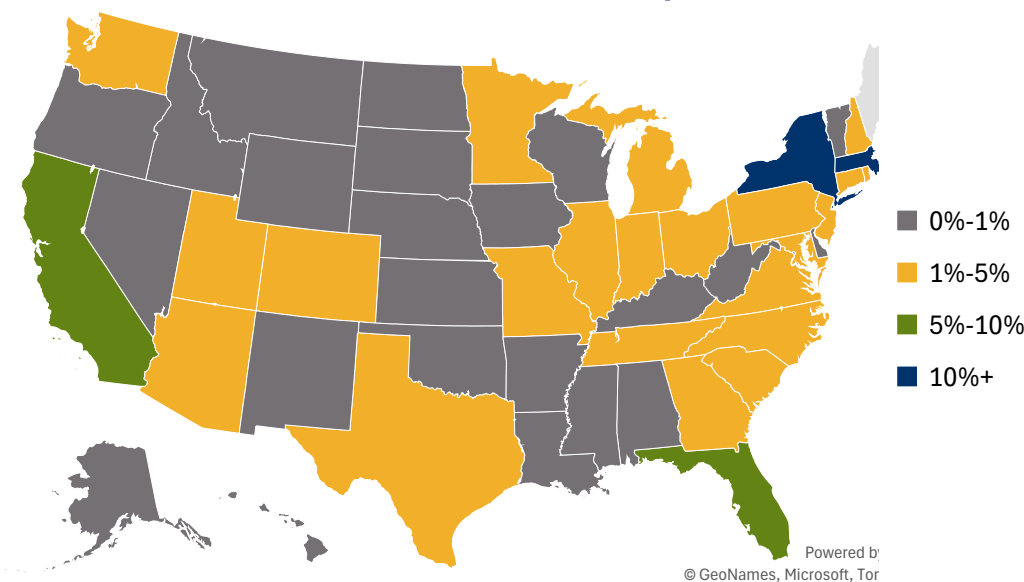
Commodity	Total Import Value
Refined petroleum products	\$2,657,167,361
Automobiles and light duty motor vehicles	\$1,326,214,124
Pharmaceuticals	\$1,058,673,527
Semiconductors and related devices	\$579,527,752
Electricity	\$491,061,740
Iron and steel and ferroalloy products	\$443,922,360
Meat processed from carcasses	\$414,077,646
Other plastics products	\$406,784,704
Natural gas distribution	\$387,081,879
Paperboard containers	\$358,620,748
Search, detection, and navigation instruments	\$332,577,646
Support activities for oil and gas operations	\$321,774,365
Processed poultry meat products	\$316,488,960
Meat	\$307,031,890
Bread and bakery products, except frozen	\$300,840,092
Cigarettes, cigars, smoking and chewing tobacco, and reconstituted tobacco	\$293,304,925
Aircrafts	\$272,713,099
All other food products	\$262,591,246
Plastics materials and resins	\$260,886,148
Other basic organic chemicals	\$239,372,526
Aircraft engines and engine parts	\$231,505,880
Dog and cat food	\$230,245,591
Printed materials	\$221,224,325
Surgical and medical instruments	\$208,110,504
Other snack foods	\$207,789,291

Source: IMPLAN

Note: Total Export Value is adjusted to 2025 dollars. List excludes service commodities.

Domestic Imports and Exports By State

State Share of Maine’s Total Domestic Exports (2023)

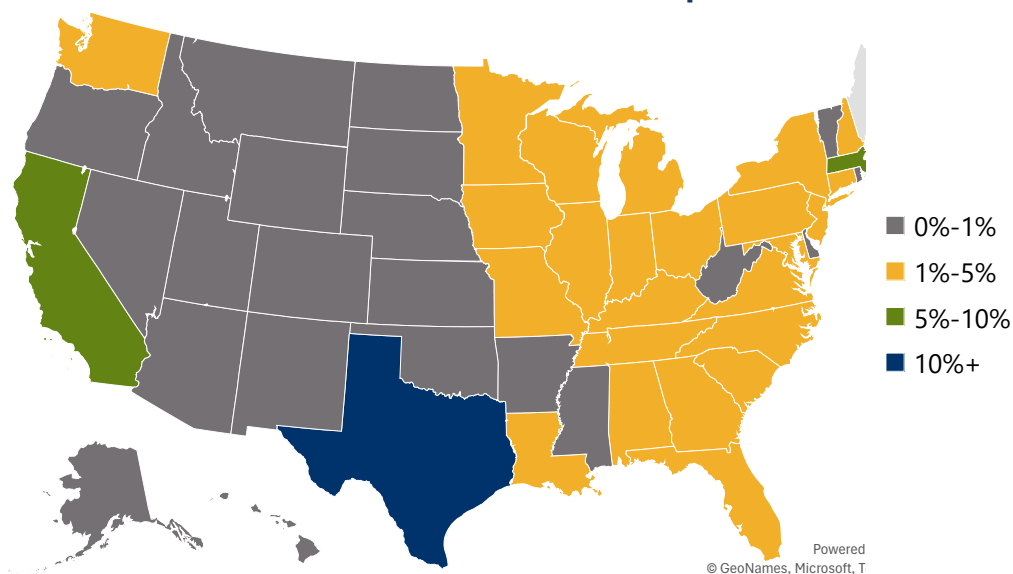


Domestic Exports

Massachusetts accounted for the largest share of Maine’s domestic exports in 2023 (12.5%), followed by **New York** (10.2%).

Compared to 2022, **California’s** share declined slightly (9.4% vs. 10%), while **New York’s** share increased (9% in 2022).

State Share of Maine’s Total Domestic Imports (2023)



Domestic Imports

Texas was Maine’s largest supplier of domestic imports in 2023, representing 12.9%—up from 10% in 2022.

California ranked second, supplying 7.8% of imports, an increase from 7% in the prior year.

SUPPLY CHAIN

Freight Analysis

In 2023 (as well as in previous years), most of Maine's domestic exports were transported by truck (94.6%). Pipeline was the second most common mode of transportation used in the state and was responsible for 2.7% of domestic

shipments.¹⁵ Multi-modes and mail account for 1.8% of shipments, while only 0.8% of Maine's domestic exports are transported by rail.

Share of Domestic Export Shipments by Mode, Maine, 2023



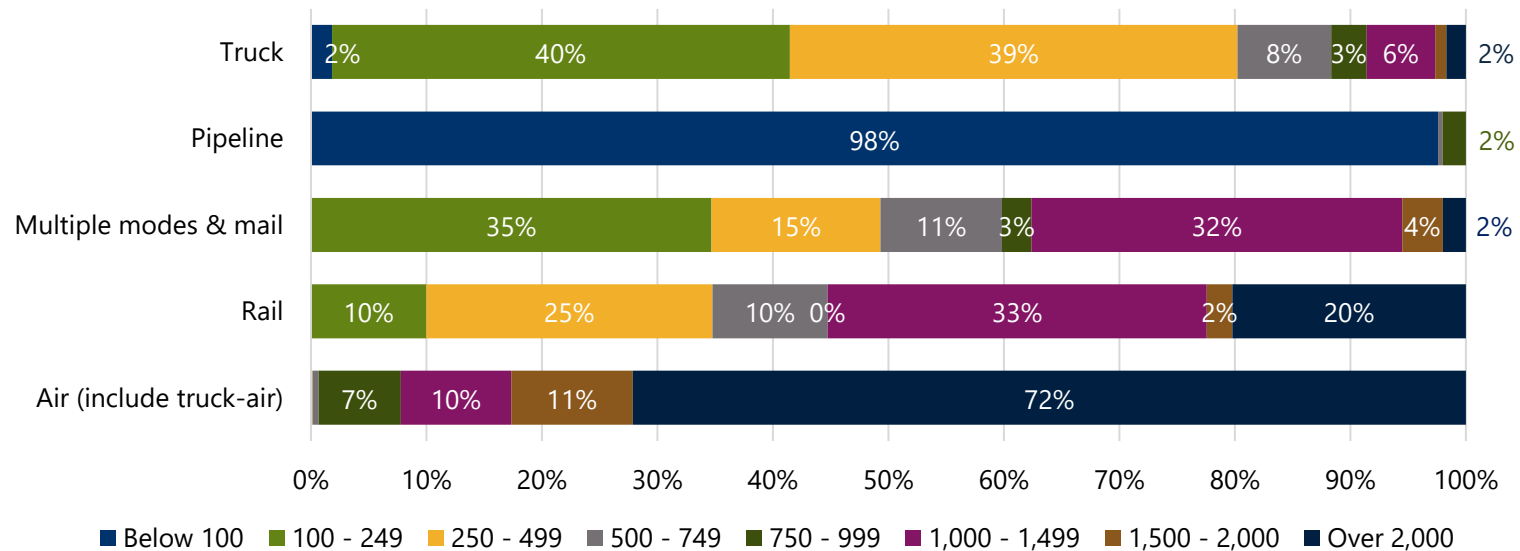
Note: Based on tons of good shipped

Source: Bureau of Transportation Statistics, Freight Analysis Framework 5



¹⁵ According to the Freight Analysis Framework, pipeline transportation includes crude petroleum, natural gas, and product pipelines.

Share of Domestic Shipments by Transportation Type and Average Distance Traveled in Miles, Maine, 2023



Note: Distances are measured in miles and shares are based on tons of goods shipped

Source: Bureau of Transportation Statistics, Freight Analysis Framework 5

Distance by Shipping Type

PIPELINE

In 2023, 98% of shipments transported by pipeline traveled less than 100 miles to their destination.

TRUCK

Approximately 78% of truck shipments were transported between 100 and 499 miles.

AIR

72% of air (including truck-air) shipments were sent over 2,000 miles.

RAIL

The largest share of Maine's rail shipments traveled between 1,000 and 1,499 miles.

MULTIPLE MODES AND MAIL

Around 35% of shipments sent using multi modes and mail traveled 100-249 miles, while 32% of shipments using this transportation type traveled 1,000-1,499 miles.

APPENDIX A: DATA TABLES

High-Level Sector Summary, Maine, 2018-2023

Ordered from largest to smallest 2023 employment

NAICS	Description	2023 Jobs	2018 - 2023 Change	2018 - 2023 % Change	2023 Payrolled Business Locations	2023 Average Earnings Per Job	2023 Location Quotient	2023 GRP
62	Health Care and Social Assistance	113,008	2,363	2.1%	5,191	\$75,686	1.18	\$9,904,152,169
90	Government	106,143	567	0.5%	3,079	\$78,910	1.00	\$10,022,476,532
44	Retail Trade	86,313	891	1.0%	6,008	\$46,508	1.24	\$8,512,269,663
72	Accommodation and Food Services	60,574	72	0.1%	4,352	\$35,665	0.99	\$3,780,609,161
31	Manufacturing	56,100	1,715	3.2%	1,888	\$83,311	0.99	\$8,615,914,443
23	Construction	50,645	5,838	13.0%	6,265	\$69,801	1.19	\$4,929,265,415
54	Professional, Scientific, and Technical Services	40,367	6,935	20.7%	10,283	\$104,830	0.78	\$5,663,583,672
56	Administrative and Support and Waste Management and Remediation Services	33,709	(2,694)	(7.4%)	4,057	\$55,205	0.76	\$2,417,079,695
81	Other Services (except Public Administration)	32,292	(1,162)	(3.5%)	3,971	\$42,172	0.89	\$1,942,187,112
52	Finance and Insurance	26,654	1,249	4.9%	2,394	\$116,774	0.89	\$6,488,571,395
61	Educational Services	20,623	197	1.0%	854	\$50,800	1.11	\$1,240,960,240
42	Wholesale Trade	20,126	(63)	(0.3%)	3,128	\$101,877	0.75	\$5,017,728,321
48	Transportation and Warehousing	19,973	1,007	5.3%	1,404	\$68,726	0.63	\$2,045,576,823
11	Agriculture, Forestry, Fishing and Hunting	17,908	1,984	12.5%	1,726	\$55,725	2.08	\$2,237,635,659
55	Management of Companies and Enterprises	16,564	5,419	48.6%	2,493	\$123,082	1.52	\$2,294,268,587
71	Arts, Entertainment, and Recreation	13,121	516	4.1%	995	\$39,307	1.01	\$901,436,021
53	Real Estate and Rental and Leasing	9,758	470	5.1%	2,062	\$73,007	0.75	\$3,515,787,460
51	Information	9,300	1,139	14.0%	1,629	\$94,599	0.68	\$2,706,180,262
22	Utilities	1,859	201	12.1%	126	\$156,475	0.74	\$1,410,773,409
99	Unclassified Industry	1,717	110	6.8%	2,113	\$100,238	1.46	Insf. Data
21	Mining, Quarrying, and Oil and Gas Extraction	239	4	1.7%	36	\$85,783	0.09	\$123,125,180
Total	All Industries	736,992	26,759	3.8%	64,051	\$70,527		\$83,769,581,220

Note: The Government Sector includes public education.

Source: Lightcast

Maine Sales Summary, 2023

NAICS	Description	2023 In-Region Sales	2023 % In-Region Sales	2023 Exported Sales	2023 % Exported Sales	2023 Total Sales	2023 GRP
11	Agriculture, Forestry, Fishing and Hunting	\$1,018,887,523	23%	\$3,348,457,666	77%	\$4,367,345,190	\$2,237,635,659
21	Mining, Quarrying, and Oil and Gas Extraction	\$115,654,358	56%	\$92,431,471	44%	\$208,085,829	\$123,125,180
22	Utilities	\$1,488,784,493	66%	\$750,556,831	34%	\$2,239,341,324	\$1,410,773,409
23	Construction	\$6,877,132,868	72%	\$2,616,909,387	28%	\$9,494,042,255	\$4,929,265,415
31	Manufacturing	\$4,142,040,262	20%	\$16,540,044,865	80%	\$20,682,085,127	\$8,615,914,443
42	Wholesale Trade	\$3,317,082,839	38%	\$5,350,009,008	62%	\$8,667,091,847	\$5,017,728,321
44	Retail Trade	\$5,205,134,333	37%	\$8,847,704,549	63%	\$14,052,838,882	\$8,512,269,663
48	Transportation and Warehousing	\$2,477,492,846	63%	\$1,436,762,702	37%	\$3,914,255,547	\$2,045,576,823
51	Information	\$3,658,478,042	79%	\$978,290,516	21%	\$4,636,768,558	\$2,706,180,262
52	Finance and Insurance	\$6,619,029,588	63%	\$3,810,911,628	37%	\$10,429,941,216	\$6,488,571,395
53	Real Estate and Rental and Leasing	\$6,615,055,504	84%	\$1,237,357,834	16%	\$7,852,413,339	\$3,515,787,460
54	Professional, Scientific, and Technical Services	\$6,581,018,331	77%	\$1,983,948,970	23%	\$8,564,967,301	\$5,663,583,672
55	Management of Companies and Enterprises	\$2,091,519,389	58%	\$1,491,782,487	42%	\$3,583,301,877	\$2,294,268,587
56	Administrative and Support and Waste Management and Remediation Services	\$3,398,765,207	76%	\$1,093,855,305	24%	\$4,492,620,512	\$2,417,079,695
61	Educational Services	\$1,202,187,566	70%	\$511,455,316	30%	\$1,713,642,882	\$1,240,960,240
62	Health Care and Social Assistance	\$10,639,250,404	67%	\$5,342,900,863	33%	\$15,982,151,266	\$9,904,152,169
71	Arts, Entertainment, and Recreation	\$900,524,773	58%	\$653,299,057	42%	\$1,553,823,830	\$901,436,021
72	Accommodation and Food Services	\$4,923,380,763	72%	\$1,945,664,454	28%	\$6,869,045,216	\$3,780,609,161
81	Other Services (except Public Administration)	\$2,509,815,314	75%	\$833,004,182	25%	\$3,342,819,495	\$1,942,187,112
90	Government	\$8,046,597,024	16%	\$43,825,420,437	84%	\$51,872,017,461	\$10,022,476,532
Total		\$81,827,831,427	44.3%	\$102,690,767,528	55.7%	\$184,518,598,955	\$83,769,581,220

Source: Lightcast

Maine Demand Summary, 2023

NAICS	Description	2023 Demand met In-Region	2023 % Demand met In-Region	2023 Demand met by Imports	2023 % Demand met by Imports	2023 Total Demand
11	Agriculture, Forestry, Fishing and Hunting	\$995,070,161	48%	\$1,067,419,536	52%	\$2,062,489,698
21	Mining, Quarrying, and Oil and Gas Extraction	\$115,606,688	10%	\$1,014,515,339	90%	\$1,130,122,027
22	Utilities	\$1,488,673,687	54%	\$1,252,245,947	46%	\$2,740,919,634
23	Construction	\$6,874,016,257	79%	\$1,858,454,261	21%	\$8,732,470,518
31	Manufacturing	\$4,140,416,696	19%	\$18,183,233,642	81%	\$22,323,650,338
42	Wholesale Trade	\$3,316,225,897	36%	\$5,960,546,882	64%	\$9,276,772,779
44	Retail Trade	\$5,202,900,317	49%	\$5,519,738,736	51%	\$10,722,639,052
48	Transportation and Warehousing	\$2,468,969,807	41%	\$3,516,639,776	59%	\$5,985,609,583
51	Information	\$3,657,545,766	44%	\$4,727,844,521	56%	\$8,385,390,286
52	Finance and Insurance	\$6,617,590,650	52%	\$6,049,570,361	48%	\$12,667,161,011
53	Real Estate and Rental and Leasing	\$6,565,378,981	75%	\$2,206,894,085	25%	\$8,772,273,066
54	Professional, Scientific, and Technical Services	\$6,579,079,874	60%	\$4,402,994,229	40%	\$10,982,074,103
55	Management of Companies and Enterprises	\$2,091,467,096	84%	\$399,834,906	16%	\$2,491,302,001
56	Administrative and Support and Waste Management and Remediation Services	\$3,398,059,111	67%	\$1,646,531,464	33%	\$5,044,590,575
61	Educational Services	\$1,201,889,394	73%	\$443,806,316	27%	\$1,645,695,710
62	Health Care and Social Assistance	\$10,585,554,557	85%	\$1,809,220,991	15%	\$12,394,775,548
71	Arts, Entertainment, and Recreation	\$895,047,219	54%	\$772,248,797	46%	\$1,667,296,017
72	Accommodation and Food Services	\$4,916,249,628	85%	\$876,038,371	15%	\$5,792,287,998
81	Other Services (except Public Administration)	\$2,508,547,167	73%	\$948,754,680	27%	\$3,457,301,847
90	Government	\$20,909,085,516	42%	\$29,080,965,234	58%	\$49,990,050,750
Total		\$94,527,374,469	51%	\$91,737,498,073	49%	\$186,264,872,542

Source: Lightcast

Change in Sales by Industry Sector, Maine, 2022-2023

NAICS	Description	2022 Sales	2023 Sales	Change	% Change	2022 % Exported	2023 % Exported	Change (Percentage Points)
11	Agriculture, Forestry, Fishing and Hunting	\$3,523,081,383	\$4,367,345,190	\$844,263,807	24.0%	76.4%	76.7%	0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	\$189,293,883	\$208,085,829	\$18,791,947	9.9%	48.2%	44.4%	(3.8%)
22	Utilities	\$1,934,701,399	\$2,239,341,324	\$304,639,925	15.7%	31.8%	33.5%	1.7%
23	Construction	\$8,980,052,600	\$9,494,042,255	\$513,989,655	5.7%	27.0%	27.6%	0.6%
31	Manufacturing	\$19,951,719,071	\$20,682,085,127	\$730,366,056	3.7%	81.7%	80.0%	(1.7%)
42	Wholesale Trade	\$8,296,896,763	\$8,667,091,847	\$370,195,085	4.5%	60.3%	61.7%	1.5%
44	Retail Trade	\$12,443,151,157	\$14,052,838,882	\$1,609,687,725	12.9%	63.1%	63.0%	(0.1%)
48	Transportation and Warehousing	\$3,710,513,083	\$3,914,255,547	\$203,742,465	5.5%	37.6%	36.7%	(0.9%)
51	Information	\$3,999,759,793	\$4,636,768,558	\$637,008,766	15.9%	24.7%	21.1%	(3.6%)
52	Finance and Insurance	\$10,335,181,599	\$10,429,941,216	\$94,759,617	0.9%	35.5%	36.5%	1.0%
53	Real Estate and Rental and Leasing	\$6,615,339,663	\$7,852,413,339	\$1,237,073,675	18.7%	16.4%	15.8%	(0.6%)
54	Professional, Scientific, and Technical Services	\$7,840,952,163	\$8,564,967,301	\$724,015,138	9.2%	22.6%	23.2%	0.5%
55	Management of Companies and Enterprises	\$3,456,989,584	\$3,583,301,877	\$126,312,293	3.7%	44.9%	41.6%	(3.3%)
56	Administrative and Support and Waste Management and Remediation Services	\$4,915,728,581	\$4,492,620,512	-\$423,108,069	-8.6%	28.0%	24.3%	(3.6%)
61	Educational Services	\$1,698,183,595	\$1,713,642,882	\$15,459,287	0.9%	31.7%	29.8%	(1.8%)
62	Health Care and Social Assistance	\$15,354,642,222	\$15,982,151,266	\$627,509,045	4.1%	34.9%	33.4%	(1.4%)
71	Arts, Entertainment, and Recreation	\$1,280,217,865	\$1,553,823,830	\$273,605,965	21.4%	41.3%	42.0%	0.7%
72	Accommodation and Food Services	\$6,800,608,912	\$6,869,045,216	\$68,436,304	1.0%	29.2%	28.3%	(0.9%)
81	Other Services (except Public Administration)	\$2,707,603,687	\$3,342,819,495	\$635,215,809	23.5%	24.6%	24.9%	0.4%
90	Government	\$49,131,982,247	\$51,872,017,461	\$2,740,035,213	5.6%	85.3%	84.5%	(0.8%)
Total		\$173,166,599,249	\$184,518,598,955	\$11,351,999,706	6.6%	56.5%	55.7%	(0.8%)

Source: Lightcast

APPENDIX B: GLOSSARY

Location Quotient: Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region “unique.” For example, if the leather products manufacturing industry accounts for 10% of jobs in your area but 1% of jobs nationally, then the area’s leather-producing industry has an LQ of 10. So, in your area, leather manufacturing accounts for a larger than average “share” of total jobs, and the share is ten times larger than normal.

Gross Regional Product (GRP): Gross Regional Product (GRP) is simply GDP for the region of study. More commonly, GRP is GDP for any region smaller than the United States, such as a state or metro. GRP measures the final market value of all goods and services produced in the region of study. GRP is the sum of total industry earnings, taxes on production and imports, and profits, less subsidies.

Competitive Effect: Competitive effect indicates how much of the job change within a given region results from some unique competitive advantage of the region. This is because the competitive effect, by definition, measures the job change that occurs within a regional industry that cannot be explained by broader trends (i.e., the National Growth Effect and the Industrial Mix Effect). It’s important to note that this effect can be positive even if regional employment is declining. This would indicate that regional employment is declining less than national employment.

APPENDIX C: 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 posting 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.](#)



IMPLAN is an economic impact analysis platform built on data (at the county, state, and national level) on commodities, core competencies, deflators, demographics, employment and wages, environmental factors, industries, occupations, taxes, and trade flows. As a modeling tool and regional economic database, IMPLAN allows for easy comparison across regions, industries, and time. [Click to learn more.](#)



Conducted every ten years in years ending in zero, the **US Decennial Census of Population and Housing** is a complete count of each resident of the nation based on where they live on April 1 of the Census year. The Constitution mandates the Census be conducted to determine how to apportion the House of Representatives among the states. The latest release of the 2020 Census contains data for a limited number of variables, including total population by race/ethnicity, population under 18, occupied and vacant housing units, and group.

Freight Analysis Framework | US Bureau of Transportation Statistics

The **Freight Analysis Framework (FAF)** creates a comprehensive picture of freight movement among states and major metropolitan areas by all modes of transportation. The FAF integrates data from a variety of sources. Starting with data from the **Commodity Flow Survey (CFS)** and international trade data from the Census Bureau, FAF incorporates data from agriculture, extraction, utility, construction, service, and other sectors. The FAF is produced by the **US Bureau of Transportation Statistics (BTS)** with support from the **Federal Highway Administration (FHWA)**. [Click to learn more.](#)

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The Project Team

Jim Damicis
Project Principal

Tori Conroy
Senior Project Manager

Angela Hallowell
Senior Analyst

Bailey McConnell
Analyst

