Construction: Industry Profile

JUNE 2023

State of Maine - DECD

Department of Economic & Community Development

PROJECT OVERVIEW

Report Purpose

This document provides an in-depth analysis of the Construction Sector in Maine, including its domestic trade activity.

Industry classification ranges from 2-digit industries (most broad) to 6-digit industries (most specific) under the North American Industry Classification System (NAICS). This report focuses on the 3- to 6-digit industry level to give more detailed analysis of Maine's domestic trade activity in the Forestry & Forest Products Sector. For details about all industries that are included in this analysis, please see the Appendix.

Project Funding

This project is commissioned by the Office of Business Development through the Domestic Trade Pilot Program and is funded in part by the Maine Jobs and Recovery Plan.

Data

The most recent year of data in this report is 2022. Five-year growth rates refer to changes from 2017-2022, and five-year projections refer to 2022-2027, unless otherwise specified. For more information about the data used in this report, see the Appendix – Data Sources.

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KEY FINDINGS

Construction

Sector Activity

- **One of the largest sectors in Maine and responsible for significant job growth since 2017**, Construction is a large and stable industry in Maine. The sector has over 49,000 jobs in 2022 and has added 5,310 in the last five years. This addition makes up 41.8% of the net job growth in Maine during this period.

- **Residential Construction has the highest concentration among Construction subsectors**. Due to the highly regional nature of the Construction sector markets, industry concentration is low for this type of activity. Across the country, the states with the highest concentration of Construction activity only have approximately 40% higher location quotients compared to the national average. In Maine, Residential Construction has a location quotient of 1.42, which is well above the other subsectors.

- **Disruptions from COVID-19** have increased volatility in demand, costs for materials, and labor and have negatively impacted Commercial construction with losses of establishments and jobs.

- **Public clients make up the majority of Construction sales.** The top ranked subsector that the Construction sector sells to is State Government, followed by Local Government. After these top two, education and other institutions like hospitals and federal government are also key markets. Including all the types of governmental and institutional subsectors together accounts for a full two-thirds of Construction sales.

Subsectors included in this report

- **Residential Construction** – activity related to the construction or remodeling and renovation of single-family and multifamily residential buildings.
- **Commercial Construction** – activity related to the construction of nonresidential buildings. This industry group includes nonresidential for-sale builders, nonresidential design-build firms, and nonresidential project construction management firms.
- **Infrastructure Construction** – activity related to the construction of distribution lines and related buildings and structures for utilities (i.e., water, sewer, petroleum, gas, power, and communication) and any primary or secondary structures (e.g., storage tanks, pumping stations, power plants, and refineries).
- **Contractors** – the trade contractors subsector comprises establishments whose primary activity is performing specific activities (e.g., pouring concrete, site preparation, plumbing, painting, and electrical work) involved in building construction or other activities that are similar for all types of construction
- **Construction Wholesalers** – activity related to the merchant wholesale distribution of lumber, plywood, millwork, and wood panels; brick, stone, and related construction materials; roofing, siding, and insulation materials; and other construction materials, including manufactured homes (i.e., mobile homes) and/or prefabricated buildings.

NATIONAL TRENDS

KEY TRENDS

- Construction is a large and mature market with an adequate and sometimes saturated presence in all major geographic markets. The maturity and intensity of manual labor make Construction a low-profit and low-productivity industry.
- Historically, the sector has been resistant to efforts to innovate construction processes. This is beginning to change with integration of digital applications and new materials.
- The regional nature of the sector means that strategic contacts and local partnerships, along with good project management, are keys to successful completion of projects. Major firms rely on building and maintaining their reputations to ensure future work.

INDUSTRY DRIVERS

- Value of residential and private non-residential construction
- Corporate profit
- State and local government investment
- Yield on 10-year Treasury note (proxy for financing costs)
- Industry has low capital intensity and is highly regional in its market structure
- Trends in the expansion of institutional clients

RECENT DEVELOPMENTS

- Recent increases in interest rates have driven up the cost to finance real estate projects, causing many of them to halt. With projects in limbo, building starts of all kinds have slowed.
- Major federal funding programs (IIJA, IRA) enacted in 2021 are starting to allocate funding and procurement of building services.
- After a post-pandemic period of high inflation and unpredictable supply chain operations, prices and supply are beginning to stabilize, providing contractors more consistent costs.
- In addition to financing costs, materials, safety and labor costs have also risen and become more variable since the onset of COVID-19 and global conflict.

SUPPLY CHAIN

SUPPLYING INDUSTRIES

Sawmills and Lumber
Concrete Manufacturing
Metal Manufacturing
Petroleum Products
Construction Machinery
Engineering Services
Hardware Retail

→ **Construction** →

BUYING INDUSTRIES

Real Estate Services
Utilities
Health Services
Professional Services
Educational Services
Hotel and Food Services
Consumers

Source: IBISWorld

DATA NOTE: This page provides a brief qualitative overview of macro trends facing this sector and structural causes of growth for the sector. A supply chain summary shows key industries upstream and downstream of the sector. Trends and projections noted by IBISWorld typically reflect a period of +/- 5 years

NATIONAL TRENDS

Jobs (2022)
9.8 Million

Job Growth
2017-2022: 8.2%
2022-2027 Projected: 6.0%

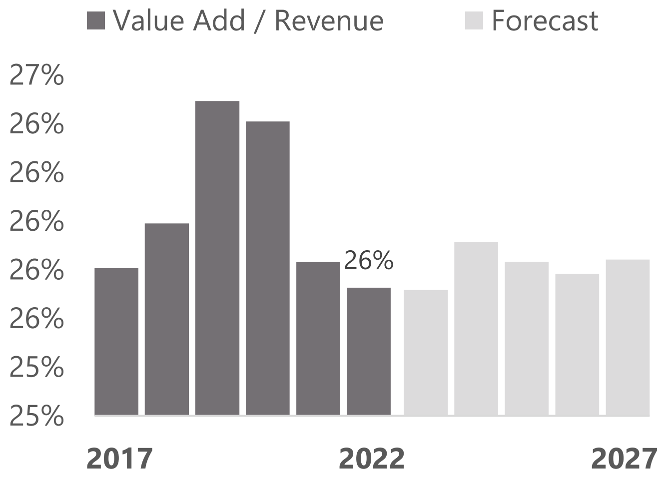
Establishments (2022)
912,780

Avg. earnings (2022)
$77,316

Domestic Demand (2022)
$2.1 Trillion

Top Partners (2022)
No International Trade Partners

The value-add-to-revenue ratio is 28% in 2022. This indicator shows how much value the production process adds to products relative to the overall size of the sector.



Construction Considered Domestic Trade

- For this sector, regional firms dominate supply. There are a limited number of international founded construction firms, but many have divisions that are headquartered in the US. Therefore, transactions are occurring in the US and thus imports and exports are 0.
- **The imports share of domestic demand is 0%** in 2022. This demonstrates how much of demand for the sector's products in the US are met by foreign imports.
- **The exports share of revenue is 0%** in 2022. This indicator shows the relative importance of exports to the sector's overall revenue strength.

SECTOR SUMMARY: MAINE PERFORMANCE

Construction Summary

Jobs: 49,284
- Data for 2022
- 6.9% of the state's total employment

Job Growth: +5,310
- Data compares 2017-2022
- Job gains are 41.8% of all Maine job gains since 2017

Job Growth Rate: +12%
- Data compares 2017-2022
- Sector growth in Maine is grater than the U.S. (+8%)

Concentration: 1.17
- Data for 2022
- Maine has a 17% higher jobs concentration than the national average

Establishments: 6,137
- Data for 2022
- The average firm size of 8.0 jobs makes it lower than US average for the sector 10.8

Average Earnings: $64,244
- Data for 2022
- Higher than the State's Average earnings for all sectors ($66,730) but lower than the U.S. rate for this sector ($77,316)

Competitive Effect: +1,185
- Data compares 2017-2022
- Local Advantages contribute substantially more jobs than expected given industry trends and national growth

Gross Regional Product: $4.5 Billion
- Data for 2022
- 5.9% of Maine's total GRP (greater than U.S. where this sector only makes up 4.7% of the total)

Productivity: $92,097
- Data for 2022
- Lags the U.S. rate of $107,501 GRP per worker

Total Sales: $9.2 Billion
- Data for 2022
- 28% of sales exported out of state
- Accounts for 5.4% of All Maine sales, outperforming the U.S. (4.5% of total sales)

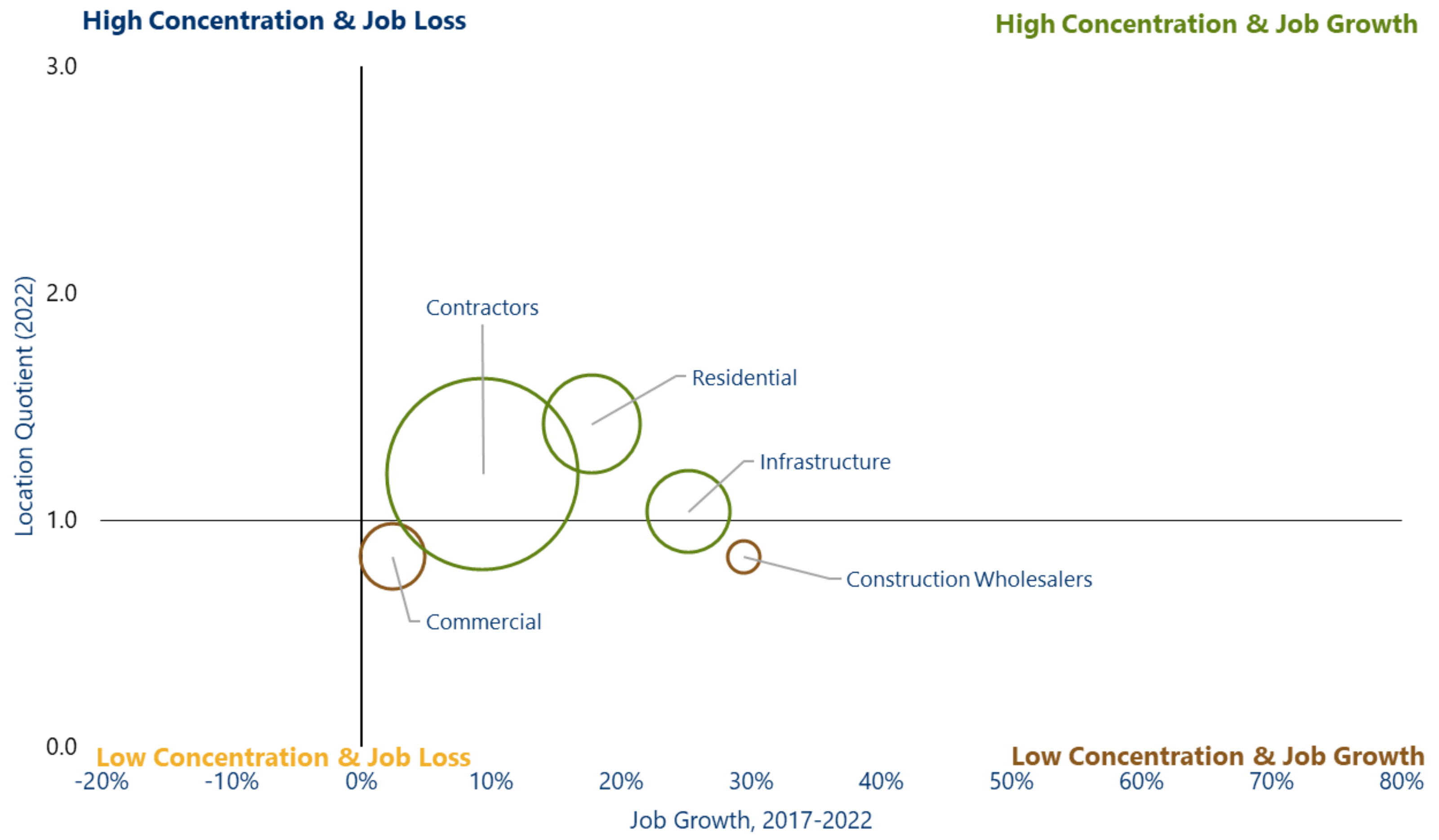
Demand: $8.3 Billion
- Data for 2022
- 79% of the demand for the sector is met in-region, the remaining 21% is imported

Leakage: $1.8 Billion
- Data for 2022
- An estimated $1.8 billion could be recaptured by Maine firms

Source: Lightcast

DATA NOTE:
National figures on this page were calculated using a different source than on page 5, which may lead to some differences.

KEY INDUSTRIES



Source: Lightcast

Note: Figure includes 4-digit NAICS industry groups with the bubble size related to the number of jobs in 2022

Findings:

- The Construction sector added **5,310 jobs** between 2017 and 2022. Maine's Construction sector has a **higher industry concentration** than the national average (U.S. location quotient = 1.00).
- The largest subsector in terms of jobs is **Contractors** with 30,770 jobs in 2022. This makes up more than 62% of the total sector.
- Construction job growth came from each of the subsectors: Infrastructure (+1,181 jobs, +25%), Residential (+1,217 jobs, +18%), Contractors (+2,615 jobs, +9%), Construction Wholesalers (+211 jobs, +29%) and Commercial (+86 jobs, +2%).
- Industry concentration for the Construction sector has less regional variation than most other types of economic activity. This is due to most of the activity serving local demand for Construction. None of the subsectors have a location quotient above 1.5. Residential has the highest quotient (1.42) which means it has more than 40% more activity than expected for a region of Maine's size. The other two subsectors with location quotients over 1.00 are Contractors (1.21) and Infrastructure (1.04).

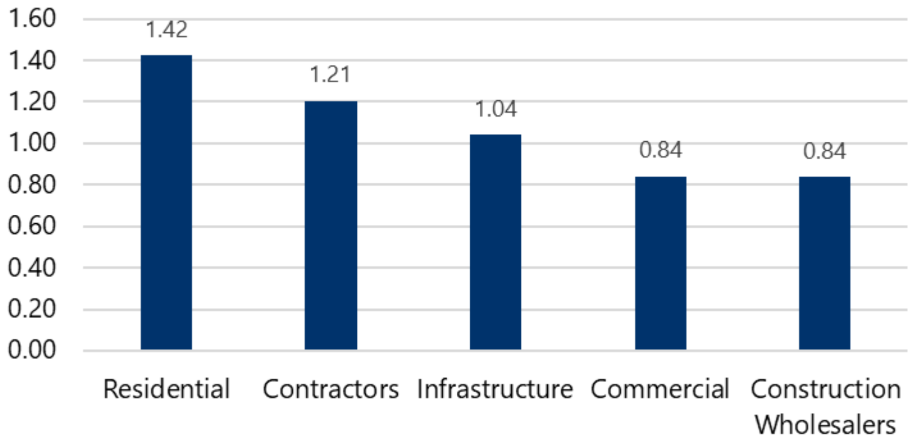
DATA NOTE:
There are three performance measures in the chart above that combine to relate the competitiveness of this activity, (1) bubble size is size of industry by jobs, (2) vertical axis measures industry concentration in Maine, (3) horizontal axis measures recent jobs growth.

KEY INDUSTRY PERFORMANCE

In 2022, Maine has 49,284 jobs in the Construction Sector

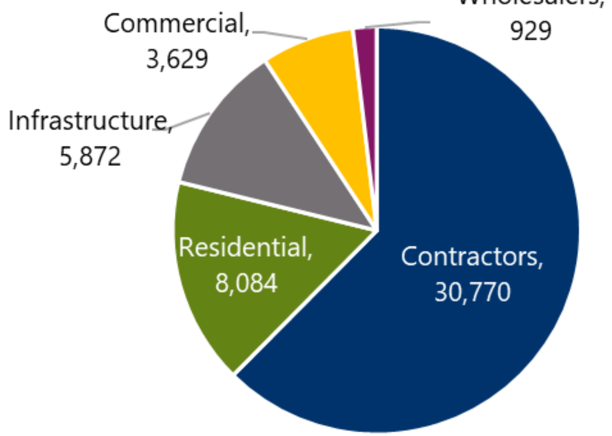
- **Contractors** makes up the largest key subsector, with almost 30,770 jobs in 2022. It has a Location Quotient of 1.21, meaning it has 21% more of this activity than would be expected.
- **Residential** construction is the next largest industry group in terms of number of jobs with 8,084 and with the highest location quotient of 1.42.
- **Infrastructure** construction has 5,872 jobs in Maine in 2022 and has an industry concentration that most closely matches the US (1.04).
- **Commercial** construction is next to last in size of jobs with 3,629 and is tied for lowest industry concentration at 0.84.
- **Construction Wholesalers** is the smallest and least concentrated subsector for Construction with under a thousand jobs and an industry concentration lower than the US.

Location Quotients- Construction Industry Groups (2022)



Source: Lightcast

Jobs Distribution (2022)



Source: Lightcast

DATA NOTE:

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.

KEY INDUSTRY PERFORMANCE

Key Industry Groups: Summary

Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022
Residential	6,867	8,084	1,217	+18%	$55,631	1.42	(429)	1,707
Commercial	3,543	3,629	86	+2%	$76,410	0.84	51	225
Infrastructure	4,691	5,872	1,181	+25%	$75,366	1.04	874	331
Contractors	28,155	30,770	2,615	+9%	$62,323	1.21	546	3,741
Construction Wholesalers	718	929	211	+29%	$84,979	0.84	144	134
Total for Maine	**43,974**	**49,284**	**5,310**	**+12%**	**$64,244**	**1.17**	**1,185**	**6,137**
Total for United States	**9,082,379**	**9,831,139**	**748,761**	**+8%**	**$77,316**	**-**	**-**	**912,780**

Source: Lightcast

Continued: Key Industry Groups

Description	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
Residential	$1,048,258,798	$159,738,215	$1,370,583,700	$673,168,392	$83,268
Commercial	$908,771,848	$332,816,201	$672,851,690	$331,331,466	$91,299
Infrastructure	$1,142,501,368	$355,507,113	$1,136,949,707	$556,680,596	$94,799
Contractors	$4,942,403,692	$799,988,202	$5,764,172,360	$2,826,997,330	$91,876
Construction Wholesalers	$280,801,645	$112,715,446	$270,656,277	$150,761,658	$162,259
Total for Maine	**$8,322,737,351**	**$1,760,765,177**	**$9,215,213,735**	**$4,538,939,442**	**$92,097**
Total for United States	**$2,127,464,331,784**	**-**	**$2,149,380,032,682**	**$1,056,857,311,026**	**$107,501**

Source: Lightcast

- **Residential Construction has the highest location quotient** of the subsectors at 1.42. Job growth of 18% compared to 2017 means Residential is both concentrated and expanding. However, the negative competitive effect of -429 relates that the same activity is growing more quickly at the national level than it is in Maine.

- **Contractors is the largest subsector** with 30,770 jobs in 2022. Unlike most other sectors, the Construction sector's different types of activity (Residential, Commercial, Infrastructure) all rely on specialist contractors that are included in this subsector. Individual carpenters, electricians and plumbers may specialize in residential versus commercial (as an example), but the intermediary arrangement where construction companies hire outside trade specialists ensures that Contractor jobs will always be the largest component of the sector.

- While Maine has strong concentrations in Residential and Contractors, the overall Construction sector is also **growing faster** (12% vs 8%) than the national average. Maine Construction **workers make less** ($64,244 per year vs $77,316) than the average US construction worker and are **less productive** ($92,097 GRP/Job vs $107,501).

KEY INDUSTRY PERFORMANCE

Industry Groups Key Metrics During COVID-19

Description	Jobs						Payrolled Business Locations						Gross Regional Product					
	2017	2018	2019	2020	2021	2022	2017	2018	2019	2020	2021	2022	2017	2018	2019	2020	2021	2022
Residential	6,867	7,080	7,180	7,364	8,031	8,084	1,525	1,498	1,555	1,616	1,692	1,707	$474,294,398	$482,174,664	$500,822,071	$547,147,510	$637,610,061	$673,168,392
Commercial	3,543	3,629	3,672	3,531	3,574	3,629	227	220	225	223	230	225	$253,590,475	$270,802,830	$291,861,285	$300,868,496	$311,207,004	$331,331,466
Infrastructure	4,691	5,121	5,185	5,826	5,833	5,872	268	311	322	340	326	331	359,387,950	407,349,779	433,658,341	500,082,523	523,979,285	556,680,596
Contractors	28,155	28,977	29,415	29,354	30,536	30,770	3,483	3,445	3,504	3,554	3,704	3,741	2,101,926,476	2,233,466,015	2,375,273,025	2,439,879,741	2,666,200,899	2,826,997,330
Construction Wholesalers	718	732	846	882	912	929	92	121	125	125	135	134	$83,218,893	$90,311,429	$102,787,816	$110,964,704	$135,244,248	$150,761,658
Total	**43,974**	**45,538**	**46,298**	**46,957**	**48,886**	**49,284**	**5,594**	**5,596**	**5,731**	**5,857**	**6,086**	**6,137**	**3,272,418,191**	**3,484,104,716**	**3,704,402,538**	**3,898,942,974**	**4,274,241,498**	**4,538,939,442**

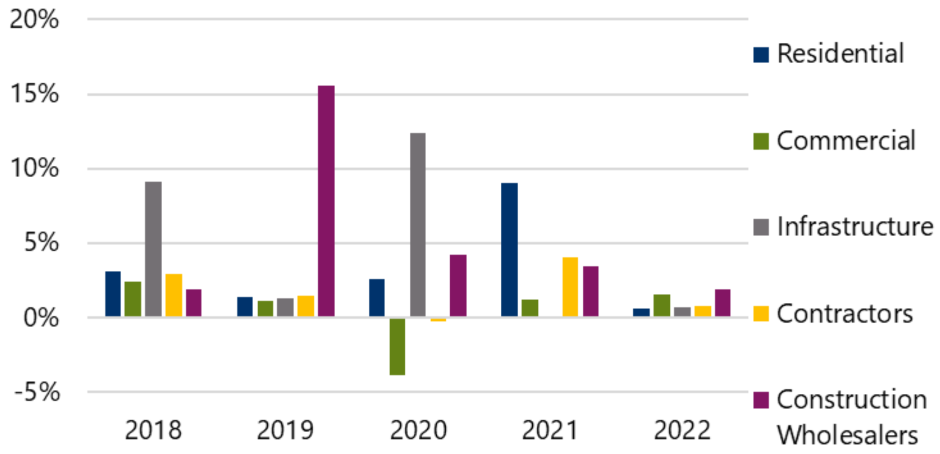
Source: Lightcast

- **Residential Construction continued to grow amidst the pandemic** by adding jobs, establishments, and GRP. During 2020, 2021, and 2022 the Residential Construction industry subsectors increased these metrics in each year as people suddenly spending more time at home decided to move (commonly out of a metro area) or invested in their residence. Jobs for these industries have increased 12.6% from 2019 to 2022.

- **Jobs for Commercial Construction decline as gross regional product grows.** Work for commercial construction (whose projects typically have a longer build period than residential projects) were growing between 2017 and 2019. Many that started before 2020 provided enough runway for work and output to continue through the pandemic. These industries realized some of the largest productivity gains (GRP/worker) in 2020, but by 2022 this was the only industry group to see jobs decline.

- **Contractors are in high demand throughout the time period.** After an already strong period of job growth from 2017 to 2019 (+10.5%), Contractors jobs saw another increase of +13.3% after the pandemic started. This is the largest jobs growth experienced within Construction. This increase was accompanied by the second largest increase in gross regional product, +28%, from 2019 to 2022 (behind only Residential at +34%). This type of activity serves as specialized labor across the spectrum of construction activity and was able to benefit from growth in a number of areas. While contractor work can sometimes travel to areas that are experiencing above normal growth, the pandemic meant that across New England (and the US) construction was in high demand.

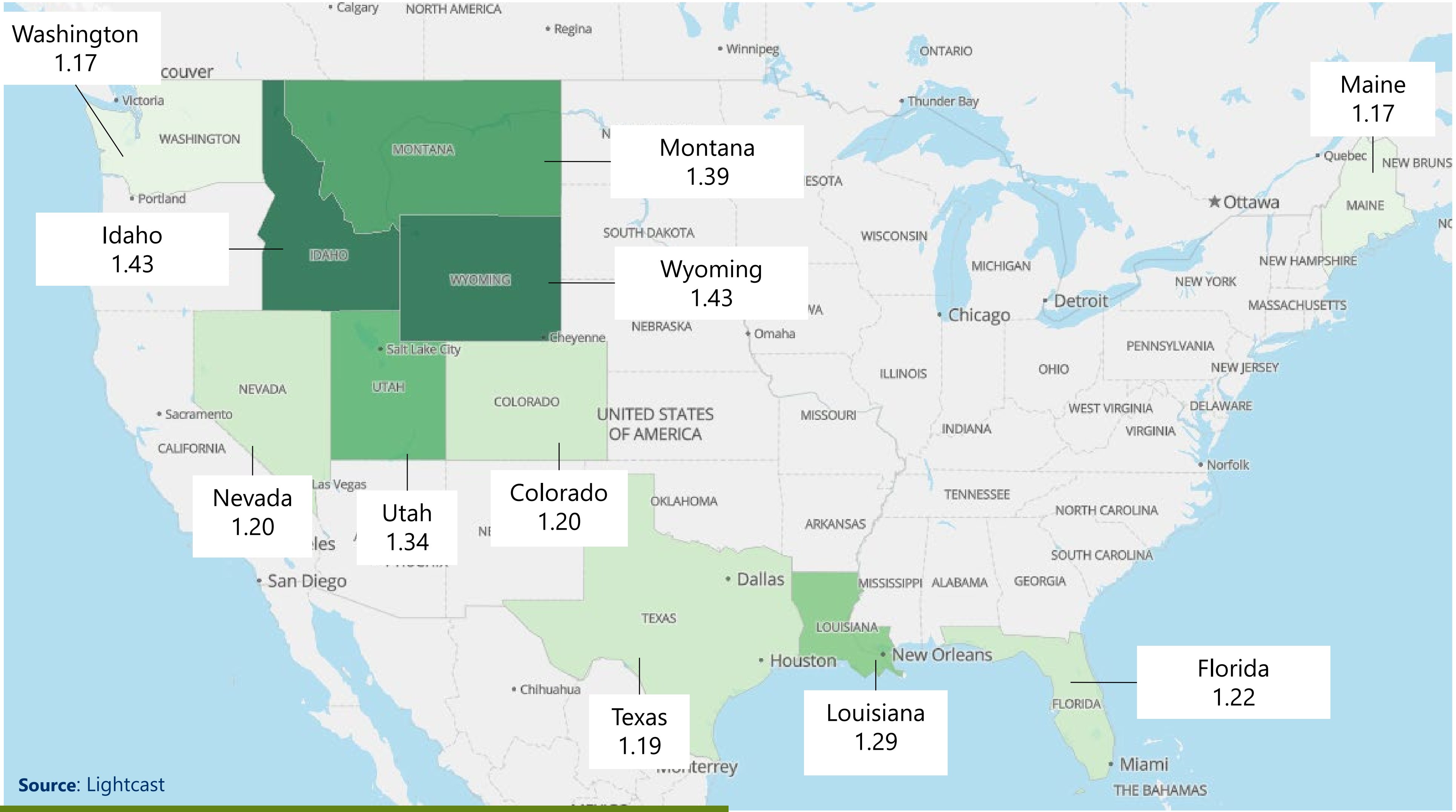
Construction Jobs, Year-Over-Year Percent Change



Source: Lightcast

KEY NATIONAL PLAYERS

No State has >1.5 Location Quotient for the Construction Sector; these are the top 10 plus Maine



Source: Lightcast

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

Industry Demand and Purchases

Where is Maine's Construction Sector buying from?

PURCHASING INDUSTRIES Industries Maine Construction Purchases From

Top 25 Sectors the Construction Industry Purchases From (2022)

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
541330	Engineering Services	$110,611,093	78.5%	$30,346,499	21.5%	$140,957,592
327320	Ready-Mix Concrete Manufacturing	$78,091,842	58.7%	$54,946,209	41.3%	$133,038,051
444110	Home Centers	$71,866,421	40.4%	$106,188,309	59.6%	$178,054,731
444190	Other Building Material Dealers	$51,391,081	46.5%	$59,177,790	53.5%	$110,568,871
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	$48,399,517	75.7%	$15,572,142	24.3%	$63,971,660
551114	Corporate, Subsidiary, and Regional Managing Offices	$47,477,536	70.0%	$20,301,840	30.0%	$67,779,376
321113	Sawmills	$39,690,981	96.5%	$1,449,908	3.5%	$41,140,888
484121	General Freight Trucking, Long-Distance, Truckload	$39,571,568	66.1%	$20,325,399	33.9%	$59,896,967
324121	Asphalt Paving Mixture and Block Manufacturing	$36,898,935	81.0%	$8,677,796	19.0%	$45,576,732
332312	Fabricated Structural Metal Manufacturing	$30,792,739	48.2%	$33,149,491	51.8%	$63,942,231
327390	Other Concrete Product Manufacturing	$29,822,801	64.2%	$16,651,266	35.8%	$46,474,067
531110	Lessors of Residential Buildings and Dwellings	$27,944,671	85.4%	$4,783,934	14.6%	$32,728,605
424710	Petroleum Bulk Stations and Terminals	$26,004,426	88.6%	$3,332,844	11.4%	$29,337,269
444130	Hardware Stores	$23,209,719	58.4%	$16,554,666	41.6%	$39,764,385
531210	Offices of Real Estate Agents and Brokers	$21,202,712	78.3%	$5,892,278	21.7%	$27,094,990
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	$20,890,663	91.9%	$1,834,226	8.1%	$22,724,888
517311	Wired Telecommunications Carriers	$20,493,755	76.6%	$6,275,465	23.4%	$26,769,220
444220	Nursery, Garden Center, and Farm Supply Stores	$19,430,625	53.3%	$17,045,130	46.7%	$36,475,755
541310	Architectural Services	$19,358,520	74.8%	$6,534,055	25.2%	$25,892,575
561320	Temporary Help Services	$18,298,107	88.8%	$2,297,814	11.2%	$20,595,921
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	$17,813,109	52.8%	$15,943,629	47.2%	$33,756,739
541110	Offices of Lawyers	$17,338,744	58.3%	$12,410,448	41.7%	$29,749,192
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	$16,517,875	81.1%	$3,844,309	18.9%	$20,362,184
484110	General Freight Trucking, Local	$16,496,252	53.3%	$14,479,134	46.7%	$30,975,386
484220	Specialized Freight (except Used Goods) Trucking, Local	$14,060,865	81.2%	$3,250,459	18.8%	$17,311,324

Source: Lightcast

- The **Engineering Services subsector is the largest supplier** of the Construction sector, accounting for $110.6 million of in-region industry purchases in 2022. This subsector supplies a significant portion (78.5%) from firms within Maine.
- Ready-Mix Concrete Manufacturing is the second largest supplier and is part of a **group of commodity manufacturing that serves as key inputs** to the Construction sector. This group also includes Sawmills, Asphalt Paving Mixture and Block Manufacturing, Fabricated Structural Metal Manufacturing, and Other Concrete Products Manufacturing.
- Along with the commodity manufacturing group is a **group of consumer retail subsectors that factor heavily in Construction**. The 3rd and 4th ranked purchasing subsectors are Home Centers and Other Building Material Dealers and these two are joined by Nursery, Garden Center, and Farm Supply Stores in the top 25.
- This ranked list only captures 40% of all purchases for the Construction sector. **Total purchases for the sector in 2022 are $3.96 B**, but only $1.69 B of it was purchased in Maine. This means that **Maine firms are only providing 42.7%** of the purchases needed of Construction sector activity.

DATA NOTE:
This table gives greater insight into supply chain gaps within the Construction Sector. Industries that have low shares of in-region purchases indicate opportunities where Maine relies heavily on imported supply, but where Maine businesses could potentially expand to recapture transactions.

DEMAND COMPARISON

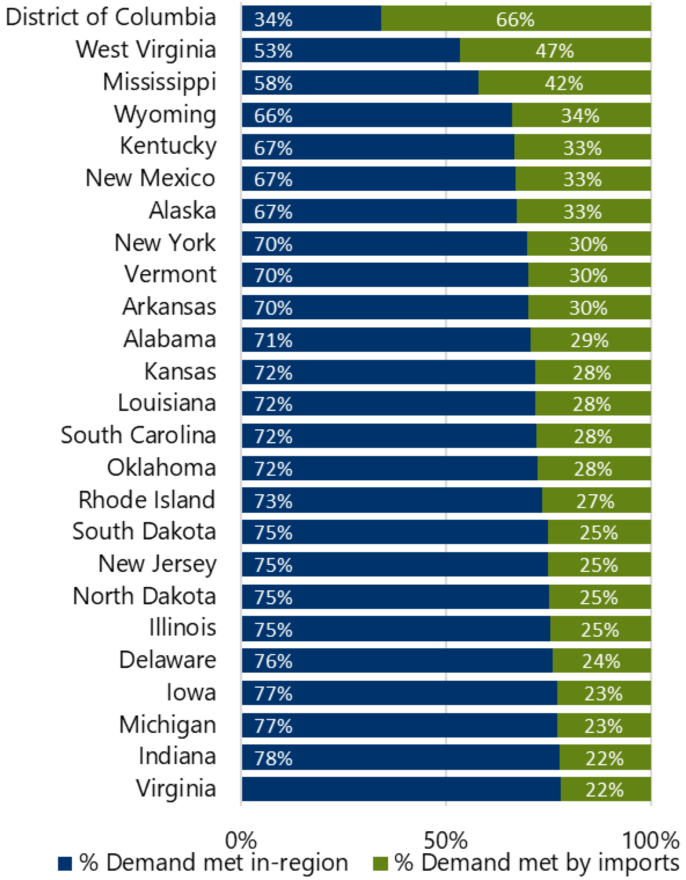
Top 10 States by Total Demand for Construction Sector (2022)

	Payrolled Business Locations	Demand met in-region	% Demand met in-region	Demand met by imports	% Demand met by imports	Total Demand
California	92,002	$243,672,869,214	88.6%	$31,325,645,337	11.4%	$274,998,514,551
Texas	60,847	$174,188,006,303	93.1%	$12,925,274,125	6.9%	$187,113,280,428
New York	52,730	$105,734,808,886	69.8%	$45,676,858,822	30.2%	$151,411,667,708
Florida	81,678	$116,180,858,101	88.4%	$15,211,004,704	11.6%	$131,391,862,805
Illinois	33,924	$60,359,982,944	75.5%	$19,639,363,214	24.5%	$79,999,346,157
Pennsylvania	31,123	$60,712,746,127	79.2%	$15,946,951,718	20.8%	$76,659,697,845
Ohio	25,484	$56,689,493,007	79.5%	$14,653,300,100	20.5%	$71,342,793,107
Georgia	25,461	$52,667,488,090	80.8%	$12,528,663,085	19.2%	$65,196,151,175
North Carolina	32,975	$52,936,889,908	81.5%	$11,978,260,250	18.5%	$64,915,150,158
New Jersey	23,947	$45,183,872,862	74.9%	$15,102,889,522	25.1%	$60,286,762,384

Source: Lightcast

- **Maine ranks 43rd among all states for total demand**, at $8.3 billion in 2022.
- The states with highest demand for the sector are the largest economies in the nation (by GRP). These states also meet high shares of their demand in-state.
- **While the largest importer of Construction is California, the state that has the largest share of demand met by imports is the District of Columbia**, with two thirds of total demand being met out of state.
- **Maine ranks in middle, 27th overall, for percent of demand met by imports**, with 79% of demand met elsewhere.
- Maine's **place in the total demand ranking** is just above Montana's $7.3 billion and just below neighboring New Hampshire's $8.9 billion.

Top 25 States by Share of Demand Met by Imports (2022)



Source: Lightcast

DATA NOTE:
Metrics for sector demand by state indicate the states that have the largest local markets for this type of activity. States whose local demand is met by imports at a high rate are using imports instead of local firms and could be a good target for Maine exports.

DOMESTIC IMPORTS

Maine's Construction trade is almost entirely local. In 2021, more than 99.5% of the $8.5 billion in Construction activity originated within the state.

- **Maine imported more than $1,000,000 in Construction products from seven states in 2021.** Geographically, these states are located across the country. In total, domestic imports make up less than 0.5% of Maine's Construction trade activity.

- **Within Maine, both Cumberland and York counties have the greatest Construction activity.** Trade in both counties exceeded a billion dollars.

- **Most Construction trade is local**. Even for counties in Maine that have highly active Construction sectors, the majority of trade activity occurs within that county. A handful of Maine counties import at least 2% of Construction commodities from elsewhere in Maine. Hancock County has the highest rate of Construction imports at 2.93%.

Construction Trade Imports To Maine, 2021 ($M)

County	Imports	% Of Total Trade
Texas	$ 15.9	0.19%
Utah	$ 7.3	0.09%
New Hampshire	$ 2.7	0.03%
Idaho	$ 2.2	0.03%
Colorado	$ 1.9	0.02%
Louisiana	$ 1.6	0.02%
Montana	$ 1.4	0.02%

Source: IMPLAN

Construction Commodity Trade Within Maine, 2021 ($M)

County	Trade Within County	Imports From Rest of Maine	Trade Import %	Total Trade
Cumberland	$ 2,131.4	$ 3.8	0.2%	$ 2,135.3
York	$ 1,336.1	$ 1.5	0.1%	$ 1,337.6
Penobscot	$ 811.9	$ 4.0	0.5%	$ 815.9
Kennebec	$ 688.4	$ 0.3	0.0%	$ 688.7
Androscoggin	$ 618.3	$ 14.9	2.3%	$ 633.2
Hancock	$ 446.0	$ 13.5	2.9%	$ 459.4
Knox	$ 315.8	$ 5.2	1.6%	$ 321.0
Oxford	$ 317.8	$ 0.2	0.1%	$ 318.0
Somerset	$ 306.0	$ 8.0	2.6%	$ 314.1
Sagadahoc	$ 278.2	$ 6.7	2.3%	$ 284.9
Aroostook	$ 255.1	$ 0.0	0.0%	$ 255.1
Lincoln	$ 245.1	$ 6.7	2.6%	$ 251.8
Waldo	$ 235.6	$ 6.9	2.9%	$ 242.5
Franklin	$ 161.0	$ 0.9	0.6%	$ 161.9
Washington	$ 137.2	$ 0.3	0.2%	$ 137.4
Piscataquis	$ 77.2	$ 0.1	0.1%	$ 77.3

Source: IMPLAN

DATA NOTE: Figures on this page are from IMPLAN's Data Library and may not match other data in this report.

DEMAND & IMPORTS

TOTAL DEMAND (2022)
Maine: $8.3 Billion
United States: $2.1 Trillion

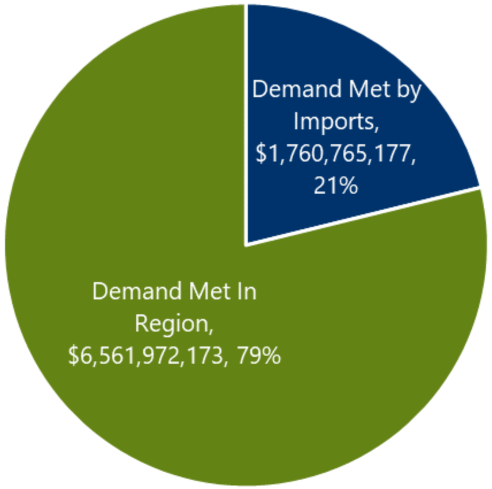
MET BY IMPORTS (2022)
Maine: $1.8 Billion
United States: NA

FOREIGN IMPORTS (2022)
Maine: NA
United States: NA

Source: Lightcast, US Census Bureau

- The demand for Construction sector activity in Maine is $8.3 billion in 2022, of which 21% ($1.8 million) is met by imports from out of state.
- The subsectors that comprise the Construction sector do not have trade relationships with countries outside the US.

Total Demand for Construction in Maine



Source: Lightcast

FOREIGN IMPORTS

The Construction sector in Maine does not conduct significant trade with partners outside the US.

DATA NOTE:
Maine’s demand for this sector’s products shows the size of the local market. The share of that market supplied in-region versus imports (either from other states in the U.S. or other countries) relates the success of local firms or the competitiveness of domestic and international imported goods.

Industry Sales and Exports

Where is Maine’s Construction Sector selling to?

SALES INDUSTRIES Industries Maine Construction Sells To

Top 25 Sectors the Construction Industry Sells To, 2022

NAICS	Sales to	In-Region Sales	Percent of In-Region Sales
902999	State Government, Excluding Education and Hospitals	$301,245,181	20.4%
903999	Local Government, Excluding Education and Hospitals	$282,484,298	19.1%
903611	Elementary and Secondary Schools (Local Government)	$226,311,991	15.3%
901199	Federal Government, Civilian, Excluding Postal Service	$65,235,797	4.4%
531110	Lessors of Residential Buildings and Dwellings	$64,534,739	4.4%
902612	Colleges, Universities, and Professional Schools (State Government)	$59,046,986	4.0%
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	$57,002,639	3.9%
531210	Offices of Real Estate Agents and Brokers	$47,538,153	3.2%
531390	Other Activities Related to Real Estate	$28,165,735	1.9%
901200	Federal Government, Military	$23,879,193	1.6%
531190	Lessors of Other Real Estate Property	$23,822,659	1.6%
531311	Residential Property Managers	$22,873,217	1.5%
902622	Hospitals (State Government)	$15,169,164	1.0%
531130	Lessors of Miniwarehouses and Self-Storage Units	$14,329,324	1.0%
221122	Electric Power Distribution	$12,389,167	0.8%
321113	Sawmills	$8,908,333	0.6%
531312	Nonresidential Property Managers	$8,671,285	0.6%
447110	Gasoline Stations with Convenience Stores	$7,367,306	0.5%
322121	Paper (except Newsprint) Mills	$6,263,764	0.4%
531320	Offices of Real Estate Appraisers	$5,534,166	0.4%
482110	Rail transportation	$5,191,337	0.4%
903622	Hospitals (Local Government)	$5,054,300	0.3%
111000	Crop Production	$5,017,744	0.3%
113310	Logging	$4,560,830	0.3%
238220	Plumbing, Heating, and Air-Conditioning Contractors	$4,098,846	0.3%

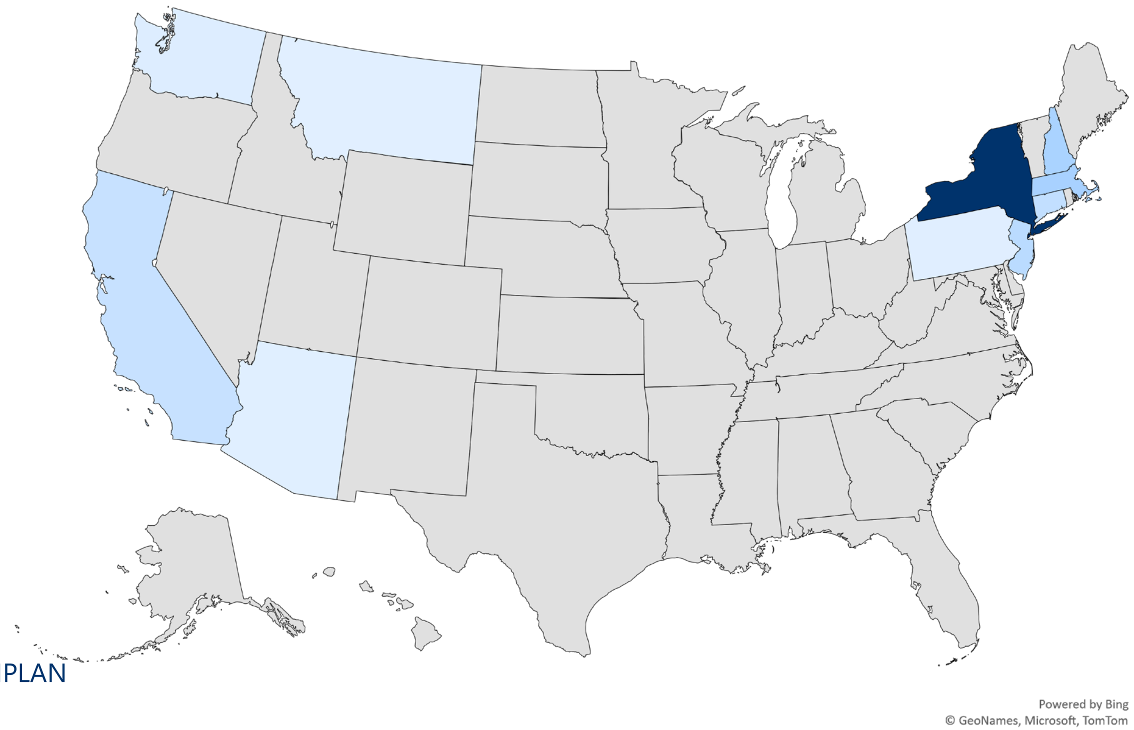
Source: Lightcast

- **The largest source of sales for the Construction sector is State Government**, excluding Education and Hospitals, with $301.2 million in sales or 20.4% of all sales for the sector**.**
- **More than half of the Construction sector's sales go to public organizations.** The first four subsectors on the ranked list of sales include State, Local, Federal and School (Local) organizations. These sum to nearly 60% of total sales for the Construction sector. When institutional sales (Universities) and the Military are included, this group of organizations represents two-thirds of sales.
- **The remaining sources of sales for Construction are lessors using these services to maintain leased property**. Property managers account for $264 million in sales or 17.8% of the Construction total.

DATA NOTE:
The sales in this table do not add up to total in-region sales because it only captures sales to other industries, and not other entities like consumers. The Percent of Total In-Region Sector Sales shows the portion of sales to a given industry as it relates to total sales to *all industries*, not total in-region sales including sales to consumers.

DOMESTIC EXPORTS

Top 10 Out-Of-State Buyers of Maine Construction



Source: IMPLAN

Maine's top domestic locations of Construction exports are primarily in the northeastern United States.

- **New York was the largest buyer of Maine's Construction exports in 2021,** accounting for approximately 63% of domestic exports.
- **Other neighbors in New England and the Mid Atlantic make up Maine's largest markets for Construction.** This includes states like Massachusetts, New Hampshire, Connecticut, New Jersey and Pennsylvania. **The Pacific West has two states in the top ten for exports**, including California and Washington. Arizona and Montana make up the rest of top 10 export states for Construction.
- **Growth in Construction exports has been flat over the last 10 years.** From 2011 to 2021, the total domestic export value of Construction has remained static with less than 0.1% growth.

DATA NOTE: Figures on this page are from IMPLAN's Data Library and may not match other data in this report. Construction exports are services delivered to regions outside of Maine.

SALES & EXPORTS

TOTAL SALES (2022)
Maine: $9.2 Billion
United States: $2.2 Trillion

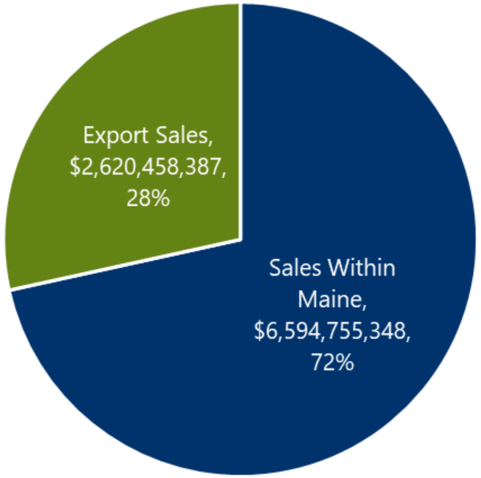
EXPORTED SALES (2022)
Maine: $2.6 Billion
United States: N/A

FOREIGN EXPORTS (2022)
Maine: NA
United States: NA

Source: Lightcast, US Census Bureau

- Industry sales for Construction activity in Maine reached a total of $9.2 billion in 2022, of which 28.4% are exported out of state ($2.6 billion).
- The subsectors that comprise the Construction sector do not have trade relationships with countries outside the US.

Total Sales for Construction in Maine



Source: Lightcast

FOREIGN EXPORTS
The Construction sector in Maine does not conduct significant trade with partners outside the US.

DATA NOTE:
Maine sales and exports for this sector indicate the scale of the industry activity and the share of that activity that is sold locally either as an intermediate good or to end consumers. Exports include sales to domestic (U.S.) markets as well as international exports.

EMERGING TRENDS

Green Construction has matured as technological options have caught up with the long-held goal of managing growth within a stable ecological footprint. Maine has a national reputation for advanced green construction firms using best practices. These practices continue to grow and include sustainable building materials, efficient insulation systems, thermal bridging, energy recovery ventilation, building waste reduction, solar-ready designs, and others to meet LEED-certified, Energy Star-rated, and IRC standards. The highly variable Maine climate makes for a ripe area to implement many of these approaches and strong demand for residential building has caused what was once a niche within construction to grow into a major part of the industry.

3D Integration is not completely new to construction, with some applications being adopted within the last decade within the industry. But for Maine there's been a change of kind with the focus on prototype projects, including University of Maine's affordable 3D printed house that was completed in late 2022. Their approach uses a combination of recent technologies from advanced software combined with at-scale 3D printing operations along with local and sustainable building materials. While the construction industry has been resistant to new process in general, it seems that recent price pressures for both materials and workers have finally broken through at the same time as key technologies have come together. Future developments seem likely as investments in advanced construction are also taking off: venture capital funding of construction technology outpaces overall VC by a factor of 15:1.

Mass Timber is a new category of wood product, comprised of multiple solid wood panels nailed or glued together, which provide exceptional strength and stability. It's a strong, low-carbon alternative to concrete and steel. Mass timber includes cross-laminated timber (CLT), nail-laminated timber, glulam, mass plywood panels, dowel-laminated timber, and laminated veneer lumber. It can be used in a range of construction, including mid-rise construction that is common in so many New England cities. Structural Round Timber (SRT) is mass timber that utilizes minimally processed whole trees for the construction market·.

RECENT INVESTMENTS

3D-Printed Residential Construction

3D-Printed Residential Construction has been prototyped by the University of Maine Advanced Structures and Composites Center (ASCC). In late 2022 they unveiled BioHome3D, the first 3D-printed house made entirely with bio-based materials. The 600-square-foot prototype features 3D-printed floors, walls and roof of wood fibers and bio-resins. The house is fully recyclable and highly insulated with 100% wood insulation and customizable R-values. Construction waste was nearly eliminated due to the precision of the printing process. ASCC is also pioneering the use of cross-laminated timber as a building material and new construction process. This technology was debuted in the erection of three-story residential dorm at College of the Atlantic that will increase capacity for student living as well as lower the carbon footprint of the school.

Mass Timber

Mass Timber continues to expand in the state. A market and financial feasibility analysis was recently completed for a Structural Round Timber (SRT) facility to potentially locate in Ashland, Maine or elsewhere in the state.

Recent project completed and underway by Maine construction companies:

L.L. Bean a $110 million new headquarters in Freeport

This project will create a 390,000 sq ft building and redevelopment of an existing warehouse. The project will generate $25 million in new tax breaks for the Town of Freeport and include nearly $10 million in tax breaks for L.L Bean.

Exit 45 Interchange a $27 million heavy highway construction in South Portland

Exit 45 in South Portland is being reconstructed into a diamond interchange to accommodate growing traffic numbers with two new ramp toll plazas and a wider bridge.

Veranda Street Bridge Replacement a $20.2 million three-phase accelerated bridge

The project includes the construction of two new 800,000-pound decks on the northbound and southbound portions of I-295 over Veranda Street. The new bridge is designed to last 100 years and ease travel at one of Maine’s busiest interchanges.

Casco Bay Ferry Terminal a $18 million Phase II & III renovations

Phase II work included adding a second floor over the existing administrative area, allowing many of the administrative activities to move up to open more space on the first floor to support operations and increased freight traffic. Work completed in Phase III will improve embarkation and de-embarkation from several gates, increase passenger and freight queuing areas, and allow for the opportunity to explore side loading capability for the heavily used passenger/vehicle ferry and expanded covered waiting areas.

Old York Toll Plaza a $11.5 million demolition and mainline reconstruction site

The new toll plaza will be moved to mile 8.8 and feature new electronic highway speed E-Z Pass lanes, allowing vehicles to travel without stopping and making travel more efficient.

TRADE SHOWS

Trade shows and resources included in this report have been vetted by industry professionals and trade show specialists.

BAUMA – Various
Held every three years, the world's leading trade fair for the construction machinery industry hosts thousands of exhibitors from a wide range of countries around the world. The World's Leading Trade Fair for Construction Machinery, Building Material Machines, Mining Machines, Construction Vehicles and Construction Equipment.

CONEXPO-CON/AGG – Las Vegas, NV
Held once every three years. CONEXPO-CON/AGG is the largest construction trade show in North America and the premier event that connects professionals from every major construction sector. Held every three years, CONEXPO-CON/AGG takes the construction industry to the next level by helping construction professionals elevate their industry expertise, experience the newest equipment and products through demonstrations and industry-leading education, make new professional connections, and grow their own marketability within the industry.

National Hardware Show – Las Vegas, NV
Experience the reimagined National Hardware Show! Reconnect with colleagues and peers from all over the world at the one event that unites the industry. Home centers, independent retailers, online retailers, wholesalers, distributors, and everyone in between attend NHS to discover the newest products, innovations and trends that are shaping the future of the home improvement and DIY industry. In National Hardware Show there are appointments with national and international exhibitors in Machinery, Home Decoration, Horticulture, Arboriculture, Electrical Engineering, Swimming Pools, Hardware Store, Materials, Equipment, and Technologies.

METALCON – Las Vegas, NV
For over 30 years, METALCON has been bringing together every facet of the metal construction and design industry. From contractors, designers, specifiers, and installers, to distributors, suppliers, and manufacturers. Our exhibitors and attendees travel from 50+ countries for 2.5 focused days of buying, selling, learning, networking, and collaboration.

World of Concrete – Las Vegas, NV
World of Concrete has been serving the global concrete & masonry construction industries for 50 years. WOC attracts approximately 1,500 exhibiting companies including original equipment manufacturers from around the world and exclusive U.S. distributors of equipment, tools, products and services for the commercial construction, concrete and masonry industries. More than 60,000 industry professionals attend from all around the world, representing all segments of the construction industry: Commercial Contractors, Concrete Contractors, Concrete Pumpers, Construction Managers, Dealers/Distributors, Decorative Concrete Contractors, Designers and Specifiers, General Contractors, Block/Segmental Unit Producers Masonry Contractors, Architects, Engineers, Block Producers, Ready Mix Producers, Rental Equipment Centers, Repair Contractors, Residential Contractors, Specialty Concrete Contractors, Precast, Pipe and Block Producers, Precast/Prestressed Producers, and more.

OTHER RESOURCES

ASSOCIATED GENERAL CONTRACTORS OF MAINE (ACG)

ACG led the charge in Maine for contractors on legislative policy, regulatory reform, business networking and workforce development. AGC is dedicated to ensuring a sound and healthy construction industry and providing the public with an assurance of the skill, responsibility and integrity of AGC-member firms. AGC Maine works for Maine's Construction Companies by providing necessary leadership on issues from site work development to environmental policy.

Home Builders and Remodelers Association of Maine

The Home Builders and Remodelers Association of Maine (HBRAME) is a not-for-profit trade association affiliated with the National Association of Home Builders [NAHB], a national association of 150,000 members representing the residential construction industry across the United States. They are the only trade association in Maine representing the residential construction industry that offers nationally recognized Certification Programs and federally-approved apprenticeship and pre-apprenticeship training programs in the construction trades.

National Association of Women in Construction

NAWIC was formed in 1955 with the core purpose of enhancing the success of women in the construction industry. In 1979, Maine Chapter 276 was formed with 34 members, bringing that purpose to Maine. Today there are two chapters in the state, covering Kittery to Presque Isle with the Maine Chapter serving central and southern Maine.

Higher Education Program Resources & Partners

- University of Maine, Construction Engineering Technology
- Central Maine Community College, Building Construction Technology
- Eastern Maine Community College, Building Construction
- Kennebec Valley Community College, Sustainable Construction
- Northern Maine Community College, Building Construction Technology
- Southern Maine Community College, Construction Institute
- Washington County Community College, Heavy Equipment Maintenance

INDUSTRY SECTORS

NAICS	Description
Residential	
236115	New Single-Family Housing Construction (except For-Sale Builders)
236116	New Multifamily Housing Construction (except For-Sale Builders)
236117	New Housing For-Sale Builders
236118	Residential Remodelers
Commercial	
236210	Industrial Building Construction
236220	Commercial and Institutional Building Construction
Infrastructure	
237110	Water and Sewer Line and Related Structures Construction
237120	Oil and Gas Pipeline and Related Structures Construction
237130	Power and Communication Line and Related Structures Construction
237210	Land Subdivision
237310	Highway, Street, and Bridge Construction
237990	Other Heavy and Civil Engineering Construction

NAICS	Description
Contractors	
238110	Poured Concrete Foundation and Structure Contractors
238120	Structural Steel and Precast Concrete Contractors
238130	Framing Contractors
238140	Masonry Contractors
238150	Glass and Glazing Contractors
238160	Roofing Contractors
238170	Siding Contractors
238190	Other Foundation, Structure, and Building Exterior Contractors
238210	Electrical Contractors and Other Wiring Installation Contractors
238220	Plumbing, Heating, and Air-Conditioning Contractors
238290	Other Building Equipment Contractors
238310	Drywall and Insulation Contractors
238320	Painting and Wall Covering Contractors
238330	Flooring Contractors
238340	Tile and Terrazzo Contractors
238350	Finish Carpentry Contractors
238390	Other Building Finishing Contractors
238910	Site Preparation Contractors
238990	All Other Specialty Trade Contractors
Construction Wholesalers	
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers
423390	Other Construction Material Merchant Wholesalers

APPENDIX

Summary Metrics for the Construction Sector

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
Residential		6,867	8,084	1,217	+18%	$55,631	1.42	(429)	1,707	$1,048,258,798	$159,738,215	$1,370,583,700	$673,168,392	$83,268
236115	New Single-Family Housing Construction (except For-Sale Builders)	4,064	4,214	150	+4%	$58,810	2.08	(110)	757	$429,996,813	$52,328,584	$693,395,140	$340,815,252	$80,869
236116	New Multifamily Housing Construction (except For-Sale Builders)	11	29	17	+156%	$51,138	0.14	16	11	$48,478,653	$45,146,534	$3,579,320	$1,678,660	$58,639
236117	New Housing For-Sale Builders	94	145	51	+54%	$54,748	0.52	24	28	$95,690,517	$50,366,120	$50,468,732	$24,211,390	$167,372
236118	Residential Remodelers	2,699	3,697	998	+37%	$52,077	1.17	(358)	911	$474,092,815	$11,896,978	$623,140,508	$306,463,089	$82,902
Commercial		3,543	3,629	86	+2%	$76,410	0.84	51	225	$908,771,848	$332,816,201	$672,851,690	$331,331,466	$91,299
236210	Industrial Building Construction	614	492	(122)	-20%	$78,389	0.64	(26)	22	$160,859,154	$100,016,579	$93,987,676	$45,917,639	$93,343
236220	Commercial and Institutional Building Construction	2,929	3,137	208	+7%	$76,099	0.88	77	203	$747,912,694	$232,799,622	$578,864,014	$285,413,828	$90,978
Infrastructure		4,691	5,872	1,181	+25%	$75,366	1.04	874	331	$1,142,501,368	$355,507,113	$1,136,949,707	$556,680,596	$94,799
237110	Water and Sewer Line and Related Structures Construction	475	647	171	+36%	$70,387	0.63	148	60	$181,830,763	$81,773,819	$111,548,518	$54,437,071	$84,189
237120	Oil and Gas Pipeline and Related Structures Construction	141	158	18	+12%	$76,559	0.22	31	10	$145,806,690	$117,276,099	$30,432,782	$14,886,875	$94,203
237130	Power and Communication Line and Related Structures Construction	664	1,485	822	+124%	$81,053	1.22	676	78	$259,175,358	$49,933,739	$298,827,687	$146,358,240	$98,540
237210	Land Subdivision	66	48	(17)	-27%	$56,933	0.25	(10)	11	$61,287,116	$40,555,820	$23,064,198	$10,934,860	$225,730
237310	Highway, Street, and Bridge Construction	2,800	2,953	153	+5%	$75,003	1.60	24	113	$353,418,929	$31,815,509	$539,564,365	$265,073,447	$89,776
237990	Other Heavy and Civil Engineering Construction	546	581	35	+6%	$69,434	0.90	3	59	$140,982,512	$34,152,127	$133,512,157	$64,990,103	$111,800

APPENDIX

Summary Metrics for the Construction Sector

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
Contractors		28,155	30,770	2,615	+9%	$62,323	1.21	546	3,741	$4,942,403,692	$799,988,202	$5,764,172,360	$2,826,997,330	$91,876
238110	Poured Concrete Foundation and Structure Contractors	920	955	34	+4%	$55,227	0.75	(55)	156	$216,360,895	$65,687,443	$176,907,130	$86,468,435	$90,587
238120	Structural Steel and Precast Concrete Contractors	140	139	(1)	-1%	$58,480	0.31	(0)	26	$75,997,917	$56,577,451	$19,832,716	$9,518,876	$68,655
238130	Framing Contractors	252	281	29	+11%	$53,600	0.63	25	59	$77,338,576	$26,385,516	$63,702,085	$30,448,856	$108,364
238140	Masonry Contractors	1,155	1,049	(106)	-9%	$56,400	1.43	(7)	147	$131,277,732	$8,513,336	$185,639,971	$90,162,302	$85,965
238150	Glass and Glazing Contractors	161	231	70	+44%	$56,924	0.60	57	28	$65,487,780	$35,727,026	$32,496,961	$15,512,926	$67,202
238160	Roofing Contractors	1,218	1,246	28	+2%	$60,998	1.08	(71)	116	$199,943,029	$52,953,412	$191,426,614	$93,493,634	$75,054
238170	Siding Contractors	162	157	(5)	-3%	$52,147	0.70	(25)	35	$43,430,456	$15,203,511	$31,687,672	$14,772,908	$94,171
238190	Other Foundation, Structure, and Building Exterior Contractors	49	56	7	+14%	$57,097	0.22	6	21	$48,189,465	$29,182,879	$19,649,816	$9,247,344	$165,342
238210	Electrical Contractors and Other Wiring Installation Contractors	4,497	5,609	1,112	+25%	$63,086	1.07	710	706	$922,343,269	$117,721,579	$862,035,257	$425,240,817	$75,814
238220	Plumbing, Heating, and Air-Conditioning Contractors	6,234	7,406	1,172	+19%	$64,361	1.18	535	760	$1,055,972,001	$108,030,045	$1,152,966,766	$568,935,332	$76,825
238290	Other Building Equipment Contractors	1,380	1,165	(214)	-16%	$77,221	1.47	(258)	72	$162,854,256	$25,554,082	$222,426,669	$108,448,481	$93,054
238310	Drywall and Insulation Contractors	1,260	1,285	25	+2%	$57,282	1.00	43	148	$246,861,422	$27,826,281	$265,742,179	$130,171,845	$101,266
238320	Painting and Wall Covering Contractors	1,194	1,189	(5)	-%	$48,819	1.11	17	270	$266,782,545	$18,160,693	$401,233,127	$196,588,262	$165,303
238330	Flooring Contractors	468	396	(71)	-15%	$54,767	0.93	(99)	88	$121,050,733	$23,827,641	$116,408,182	$56,378,864	$142,299
238340	Tile and Terrazzo Contractors	136	141	6	+4%	$58,334	0.48	10	25	$72,597,571	$18,948,102	$60,803,644	$29,048,639	$205,381
238350	Finish Carpentry Contractors	819	1,023	203	+25%	$53,780	1.25	145	228	$225,495,363	$2,635,926	$369,880,847	$180,854,796	$176,847
238390	Other Building Finishing Contractors	373	420	47	+13%	$68,378	0.98	32	47	$82,721,093	$16,823,588	$95,448,269	$45,828,377	$109,024
238910	Site Preparation Contractors	6,043	6,558	515	+9%	$65,235	3.28	(248)	595	$466,793,097	$718,787	$1,171,921,376	$576,518,710	$87,911
238990	All Other Specialty Trade Contractors	1,693	1,464	(229)	-14%	$60,415	0.75	(269)	218	$460,906,491	$149,510,904	$323,963,078	$159,357,925	$108,857
Construction Wholesalers		718	929	211	+29%	$84,979	0.84	144	134	$280,801,645	$112,715,446	$270,656,277	$150,761,658	$162,259
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	456	632	176	+39%	$86,188	1.27	147	71	$130,564,261	$31,100,419	$186,570,899	$104,041,135	$164,566
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	152	151	(1)	-1%	$73,270	0.53	(18)	28	$65,237,466	$32,830,133	$37,630,858	$20,947,814	$138,408
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	38	41	3	+7%	$108,673	0.22	(4)	16	$48,295,408	$35,097,961	$15,185,549	$8,435,328	$206,545
423390	Other Construction Material Merchant Wholesalers	71	105	34	+48%	$85,362	0.73	19	19	$36,704,510	$13,686,933	$31,268,971	$17,337,381	$165,530
	Total for Maine	**43,974**	**49,284**	**5,310**	**+12%**	**$64,244**	**1.17**	**1,185**	**6,137**	**$8,322,737,351**	**$1,760,765,177**	**$9,215,213,735**	**$4,538,939,442**	**$92,097**
	Total for United States	**9,082,379**	**9,831,139**	**748,761**	**+8%**	**$77,316**	**-**	**0**	**912,780**	**$2,127,464,331,784**	**-**	**$2,149,380,032,682**	**$1,056,857,311,026**	**$107,501**

Source: Lightcast

GLOSSARY

Competitive Effect: Competitive effect indicates how much of the job change within a given region is the result of 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.

Demand: Regional sales demand for sales of Industry.

Earnings: Industry earnings are the total industry wages, salaries, supplements, and proprietor income in the region, divided by the number of jobs in the region.

Exports: The amount of money that is spent by industries located outside the region in exchange for goods or services produced by an industry located in the region. Exports can be either foreign or domestic.

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 & imports, and profits, less subsidies

Jobs: A job is any position in which a worker provides labor in exchange for monetary compensation. This includes those who work as employees for businesses (a.k.a. "wage and salary" employees) and proprietors who work for themselves. Lightcast reports employment as annual averages. Employment averages represent jobs, not workers, since one individual may hold multiple jobs. Due to limitations of source data, both full- and part-time jobs are included and counted equally, i.e., job counts are not adjusted to full-time equivalents. Geographically, payroll jobs are always reported by the place of work rather than the worker's place of residence.

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 Construction 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 Construction accounts for a larger than average "share" of total jobs—the share is ten times larger than normal.

Payrolled Business Locations: Also referred to as a "Establishments", is a single physical location of some type of economic activity (a business), used for reporting purposes in government data sources. A single company may have multiple establishments.

Trade-Weighted Index: This index measures the strength of the US Dollar relative to the currencies of the nation's trading partners, weighted based on the share of trade conducted with each country. This index is produced by the Federal Reserve.

Source: Lightcast Knowledge Base, IBIS World

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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.

TradeStats Express (TSE) National and State Dashboards present data on US exports and imports by trade partner and product for 2009 forward. Data are presented using two classification systems: the Harmonized System (HS) and the North American Industrial Classification System (NAICS). National trade statistics in TSE cover the physical movement of merchandise between the United States and foreign regions. State trade statistics cover the physical movement of merchandise between a given state and foreign regions. Click to learn more.

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