Domestic Trade Industry Market Analysis

November 2023

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STATE OF MAINE
DOMESTIC TRADE INDUSTRY MARKET ANALYSIS

Executive Summary

The Domestic Trade Industry Market Analysis[1] is intended to inform the State of Maine's Office of Business Development's domestic trade strategy, which helps industries impacted by COVID-19 grow and succeed in new domestic markets.

This report provides insight into the State of Maine's macroeconomic performance as well as the state's recovery after the pandemic. After analyzing the macroeconomic conditions, COVID-19 impacts, and aggregating industry data from Camoin Associates' previous studies on Maine's COVID-19-impacted industries, our team identified new market opportunities across the United States.

INDUSTRIES IMPACTED BY COVID-19

- Manufacturing
- Advanced Machinery and Metals Manufacturing
- Agriculture, Seafood, and Food Manufacturing
- Biomedical Manufacturing
- Clean Energy
- Construction
- Forestry and Forestry Products
- Information Technology
- Logistics, Transportation, and Warehousing
- Retail Trade

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MACROECONOMIC CONTEXT

Overall, based on macroeconomic conditions, Maine has performed well compared to New England and the US before, during, and after the COVID-19 pandemic. While it is too soon to predict, these trends may position Maine for growth that exceeds expectations from projections based on trends of the past 5-10 years.

Population Growth

Pre-Pandemic (2017-2019)

Maine gained **over 12,500 in net new population** (0.5% annually), which was on par with the US and slightly higher than New England.

Pandemic (2019-2020[2])

Maine experienced **population growth of 0.4%.**

Pandemic Recovery (2020-2022)

Maine posted further gains, with **almost 22,000 in net new population** (0.8% annually), far outpacing the population growth in both New England and the nation during this same time period.

Gross Regional Product (GRP)

Pre-Pandemic (2017-2019)

Maine's nominal GRP **grew 15%**, slightly higher than both New England and the US.

Pandemic (2020)

Maine's GRP **grew by 2%**, while the GRPs of New England and the US both shrunk by -2%.

Pandemic Recovery (2021-2022)

Maine's GRP has **grown at the same rate as the US GRP (21%),** which is higher than New England's GRP during this same time period (19%).

Employment

Pre-Pandemic (2017-2019)

Maine's employment grew at a moderate pace, with the number of jobs **increasing by 0.9% annually**,[3] slightly ahead of New England but lagging the US.

Pandemic Recovery (2021-2022)

Maine's employment grew **significantly, by 2.9% annually**, on par with the nation and region's annual growth.

Next Five Years (2022-2027)

Maine's employment is expected to grow at **just 0.6% annually**,[4] about half of the growth expected in New England and the US (1.4%).

These projections are driven by economic models that take into consideration growth in the past 5-10 years and may understate Maine's actual future growth, particularly if the trends experienced during and after COVID-19 continue.

Consumer Spending

The pandemic had a profound impact on consumer spending in 2020 and the years following. During shutdowns in 2020, consumers had fewer options for spending their money and were unable to visit stores, restaurants, and entertainment venues in person, so they stashed their extra spending money in savings accounts.

This led to pent-up demand during the recovery (2020-2021) and Maine experienced rapid **growth of 13%** in consumer spending across the economy during that time.

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[2] Population estimates were adjusted to reflect 2020 Census results, and can be interpreted as preliminary intercensal population estimates. Therefore, comparison to years before 2020 can be made linearly to years following the most recent Census.

[3] Compound Annual Growth Rates (CAGR) represent the average annual growth rate over a given time period. Here, it is used so that time periods of varying durations can be compared to one another. For example, it allows the period of 2017-2019, a two-year period, to be compared to growth rates during the period of 2022-2027, a five-year period.

[4] These employment projections are derived from Lightcast and are separate from the Consensus Economic Forecasting Commission's economic forecasts.

COVID-19 IMPACTS ON INDUSTRIES

Based on the 2022 Domestic Trade Reports of Maine's key COVID-19-impacted industry groups, Camoin Associates reviewed these reports to aggregate and isolate sales-related indicators to understand the Pre-Pandemic (2017-2019), Pandemic (2020), and Pandemic Recovery (2020-2022) data.

The industry indicators included in the following charts are 1) Total employment, 2) Gross Regional Product (GRP), and 3) GRP Property Income.[5]

Pre-Pandemic

Maine Comparative Industry Performance, 2017-2019 (annualized)

	Employment		GRP		GRP Property Income	
Advanced Manufacturing	🟢	4.0%	🟢	6.8%	🟡	5.4%
Aerospace	🟢	7.3%	🟡	6.0%	🔴	3.2%
Biomedical Manufacturing	🟢	8.8%	🟢	11.6%	🟢	10.3%
Clean Energy	🟢	4.9%	🟢	6.6%	🔴	1.2%
Construction	🟢	2.6%	🟢	6.4%	🔴	0.2%
Food	🟡	1.2%	🟡	5.0%	🟢	7.0%
Agriculture	🟡	1.6%	🔴	-0.2%	🔴	1.0%
Seafood	🔴	-2.0%	🟢	7.1%	🟢	17.2%
Food Manufacturing	🟢	2.8%	🟢	7.2%	🟢	10.7%
Food Wholesaling	🟡	1.6%	🔴	4.0%	🔴	0.6%
Forestry and Forest Products	🔴	-0.6%	🟢	7.8%	🟢	8.9%
Information Technology	🟢	6.4%	🟢	10.7%	🟢	10.3%
Retail	🔴	-0.5%	🟡	4.8%	🟡	5.2%
Logistics, Transportation, and Warehousing	🟢	-2.8%	🔴	2.6%	🔴	-4.0%
Total Maine		**0.9%**		**5.2%**		**5.3%**
Total US		**1.3%**		**4.7%**		**4.7%**

Source: Lightcast, Camoin Associates

Note: Annualized growth rates reflect the average growth rate that occurred annually instead of the total growth rate that occurred over the given time period.

Key

🟢 Target sector growth rate is one or more percentage points higher than the state's
🟡 Target sector growth rate is within one percentage point of the state's
🔴 Target sector growth rate is one or more percentage points lower than the state's

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[5] Property Income, sometimes called "non-labor income" or "profits," is generally what is left after businesses make payments for labor, taxes on production, and the purchase of produced inputs. It is one of the four components of GRP, alongside earnings (labor income), taxes on production and imports, and subsidies. (Lightcast Knowledge Base)

COVID-19 Trough

Maine Comparative Industry Performance, 2019-2020 (annual change)

	Employment		GRP		GRP Property Income	
Advanced Manufacturing	🔴	-6.5%	🔴	-5.1%	🔴	-3.0%
Aerospace	🔴	-6.2%	🔴	-12.2%	🔴	-16.6%
Biomedical Manufacturing	🟢	1.3%	🟢	20.1%	🟢	22.0%
Clean Energy	🟢	3.9%	🟢	6.6%	🟢	15.9%
Construction	🟢	1.4%	🟢	5.3%	🟢	37.4%
Food	🟢	3.9%	🟢	4.6%	🟢	19.3%
Agriculture	🟢	10.7%	🟢	4.3%	🟢	38.6%
Seafood	🟢	16.4%	🔴	-2.5%	🔴	5.1%
Food Manufacturing	🟢	-3.1%	🟢	12.5%	🟢	19.5%
Food Wholesaling	🔴	-6.5%	🔴	-0.3%	🟡	9.0%
Forestry and Forest Products	🟢	0.8%	🟢	5.6%	🟢	15.3%
Information Technology	🟢	2.9%	🟢	5.2%	🔴	1.3%
Retail	🟡	-5.2%	🟢	5.1%	🟢	27.6%
Logistics, Transportation, and Warehousing	🔴	-7.2%	🔴	-6.5%	🔴	5.3%
Total Maine		**-4.9%**		**2.0%**		**8.0%**
Total US		**-5.1%**		**-2.0%**		**-1.1%**

Source: Lightcast, Camoin Associates

Key

🟢 Target sector growth rate is one or more percentage points higher than the state's

🟡 Target sector growth rate is within one percentage point of the state's

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The COVID-19 pandemic had a profound impact throughout the economy, with reverberations that changed the way many industries operate. Looking at employment and GRP, several key industry groups stand out as being the most negatively impacted by COVID-19. These industries include Advanced Manufacturing, Aerospace, Food and Beverage Wholesaling, and Logistics, Transportation, and Warehousing (LTW), which fared worse than the overall economy in terms of both employment and GRP.

During the COVID-19 recovery from 2020-2022, Seafood as well as Forestry and Forest Products stand out as industries that underperformed the overall economy. These industry groups had relatively low growth rates coming out of the pandemic for both employment and GRP. Construction underperformed the state's economy for GRP growth.

While many industries met or exceeded state growth rates during and following the height of the pandemic, COVID-19 still impacted the industries' health as employment and GRP growth rates were reduced below historical trends.

The pandemic recovery provided favorable conditions for some of the key industry groups, leading to growth rates well above historical trends.

Biomedical Manufacturing, Information Technology, Retail, and Logistics, Transportation, and Warehousing had strong employment growth during 2020-2022.

Advanced Manufacturing, Clean Energy, Construction, Food, IT, Retail, and Logistics, Transportation, and Warehousing had strong GRP growth rates compared to the overall state economy from 2020-2022.

Considering all of the COVID-19 industry trends in Maine, direct support for continued recovery will be a critical factor for Maine's businesses and industry initiatives that support sustainable growth, including workforce, infrastructure, supply-chain resiliency, and programs to support expanding markets outside of the state.

COVID-19 Recovery

Maine Comparative Industry Performance, 2020-2022 (annualized)

	Employment		GRP		GRP Property Income	
Advanced Manufacturing	○	3.4%	●	11.2%	●	12.1%
Aerospace	○	3.0%	○	10.3%	●	11.2%
Biomedical Manufacturing	●	15.4%	○	10.2%	●	11.3%
Clean Energy	●	4.6%	●	11.4%	●	9.6%
Construction	○	2.5%	●	8.5%	●	-3.2%
Food	○	3.2%	●	11.5%	●	3.8%
Agriculture	●	6.4%	●	25.6%	●	11.2%
Seafood	●	-1.3%	●	1.4%	●	-1.4%
Food Manufacturing	○	3.9%	○	10.3%	●	-2.9%
Food Wholesaling	○	2.1%	○	11.0%	●	11.9%
Forestry and Forest Products	●	-2.0%	●	7.0%	●	9.7%
Information Technology	●	8.2%	●	17.8%	●	22.5%
Retail	○	2.8%	○	10.4%	●	12.2%
Logistics, Transportation, and Warehousing	○	2.0%	●	11.9%	●	17.6%
Total Maine		**2.9%**		**10.2%**		**13.4%**
Total US		**3.0%**		**10.2%**		**13.3%**

Source: Lightcast, Camoin Associates

Note: Annualized growth rates reflect the average growth rate that occurred annually instead of the total growth rate that occurred over the given time period.

Key

● Target sector growth rate is one or more percentage points higher than the state's
● Target sector growth rate is within one percentage point of the state's
● Target sector growth rate is one or more percentage points lower than the state's

SUPPLY CHAIN

To provide insights on supply chains and market opportunities by industry, Camoin Associates assessed logistics data on the method of transportation and typical distances traveled of goods and services. This was overlaid with market opportunities to further shed light on market potential across the US.[6] This is what we found in the analysis:

Maine ships most of the targeted sectors' goods to **New England and the Mid-Atlantic.**

87% of domestic export shipments from Maine are **transported on trucks.**

Medium-range shipments of 250-499 miles make up the largest share of Maine's domestic exports at 43% of the state's total tonnage in 2022.

Construction products (including building stone, gravel, and natural sand) tend to travel **the shortest distances**, with about 99% moving less than 250 miles on average.

Forest products has the lowest share of shipments by truck, at only 66%. Multiple nodes (24%) and Rail (11%) account for its other major modes of distribution.

Advanced Manufacturing, Construction, Food and Beverage Manufacturing, and Pharmaceuticals have the highest shares of truck shipments (97%-100%).

About two-thirds of Maine's domestic exports of **Food and Beverage products traveled to medium-range destinations** in 2022 (250-499 miles).

Pharmaceuticals are shipped the longest distances, with 97% moving over 750 miles on average.

[6] Data used in this section was collected via the Freight Analysis Framework Version 5, a data product developed by the National Transportation Research Center in the Oak Ridge National Laboratory. This research combines data from the Commodity Flow Survey and other data from the Bureau of Transportation Statistics and Federal Highway Administration.

DOMESTIC TRADE MARKET OPPORTUNITIES

Research and data analysis indicate that opportunities to enter new domestic markets vary across target sectors. These opportunities for each target sector are detailed below along with why they are important opportunities for the State of Maine.

Overall, this assessment is based on economic performance (employment, output), and existing levels of domestic trade (sales by Maine companies outside of the state but within the US vs. purchases by Maine companies from outside of the state), and supply chains including transportation metrics.

Methodology

Camoin Associates analyzed employment concentrations, domestic imports, domestic imports per population, and average shipping distances within each target industry across each region in the US.

Using a tiered ranking system, we categorized industry performance across regions into top, middle, or bottom third tiers based on the metrics value in a specific region relative to the other.

The most promising opportunities emerged in regions where:

1. The industry ranked in the top third for domestic imports per population, indicating a substantial demand for industry-related goods relative to the local population.

2. Regions ranked in the bottom third for employment concentration, suggesting a limited native workforce, meaning they would rely on continued imports to meet demand.

While we considered average shipping distance, its significance varied depending on the specific industry and the nature of the goods being transported, making it a less critical factor in our decision-making process.

Please see Appendix A for detailed industry performance tables and additional methodology.

WEST

MIDWEST

NORTHEAST

SOUTH

Pacific

Advanced Manufacturing

Mountain

Biomedical Manufacturing
Forestry and Forest Products

West South Central

Biomedical Manufacturing
Information Technology

East South Central

Advanced Manufacturing
Aerospace
Biomedical Manufacturing
Clean Energy
Construction
Seafood
Food and Beverage Manufacturing and Wholesale
Forestry and Forest Products
Information Technology
Logistics, Warehousing, and Transportation
Retail Trade

West North Central

Advanced Manufacturing
Aerospace
Agriculture
Biomedical Manufacturing
Clean Energy
Seafood
Food and Beverage Wholesale

Forestry and Forest Products
Information Technology
Logistics, Warehousing, and Transportation
Retail Trade

East North Central

Agriculture
Clean Energy
Construction
Seafood
Food and Beverage Wholesale
Information Technology

New England

Advanced Manufacturing
Food and Beverage Manufacturing
Logistics, Warehousing, and Transportation
Retail Trade

Mid-Atlantic

Construction
Food and Beverage Manufacturing

South Atlantic

Aerospace
Biomedical Manufacturing
Food and Beverage Manufacturing
Seafood

DOMESTIC TRADE OPPORTUNITIES BY REGION

New England

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont	• Advanced Manufacturing • Food and Beverage Manufacturing • Logistics, Warehousing, and Transportation • Retail Trade	• Vermont • New Hampshire • Connecticut • Massachusetts	Maine lies within New England, and therefore domestic trade is within close proximity. This allows Maine to trade products that typically travel only short distances. The primary method of distribution to New England is trucking.

Mid-Atlantic

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
New Jersey, New York, and Pennsylvania	• Construction • Food and Beverage Manufacturing	• New York • New Jersey	The Mid-Atlantic is in relatively close proximity to Maine, which allows for significant trade volumes of Maine's products. About 35% of freight leaving Maine goes to the Mid-Atlantic region.

East North Central

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Indiana, Illinois, Michigan, Ohio, and Wisconsin	• Agriculture • Clean Energy • Construction • Seafood • Food and Beverage Wholesale • Information Technology	• Indiana • Wisconsin • Michigan	East North Central is located within medium distance from Maine, with freight traveling an average of 750-1,500 miles. While the primary freight mode for this region is trucking, rail and multi-modal freight are also key to delivering Maine's products to the area.

West North Central

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota	• Advanced Manufacturing • Aerospace • Agriculture • Biomedical Manufacturing • Clean Energy • Seafood • Food and Beverage Wholesale • Forestry and Forest Products • Information Technology • Logistics, Warehousing, and Transportation • Retail Trade	• North Dakota • South Dakota • Nebraska • Kansas	West North Central is fairly long-distance from Maine, with shipments traveling an average of 1,000-2,000 miles. The most common mode of freight for goods heading to West North Central is trucks, though multi-modal freight also represents about one-third of distribution.

South Atlantic

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, and West Virginia	• Aerospace • Biomedical Manufacturing • Food and Beverage Manufacturing • Seafood	• Delaware • Virginia • Maryland • West Virginia	The South Atlantic has the benefit of being on the East Coast with Maine, though located at a slightly longer distance, with shipments from Maine averaging 750-1,500 miles of travel. 5% of freight leaving Maine is going to the South Atlantic region, with trucks being the most common method of transport.

East South Central

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Alabama, Kentucky, Mississippi, and Tennessee	• Advanced Manufacturing • Aerospace • Biomedical Manufacturing • Clean Energy • Construction • Seafood • Food and Beverage Manufacturing and Wholesale • Forestry and Forest Products • Information Technology • Logistics, Warehousing, and Transportation	• Kentucky • Mississippi	Freight leaving Maine for East South Central travels an average 1,000-1,500 miles. Trucks account for approximately 95% of distribution to the region.

West South Central

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Arkansas, Louisiana, Oklahoma, and Texas	This region did not stand out with specific high-priority area opportunities. However, Biomedical Manufacturing and Information Technology are potential medium-priority opportunities.	• Texas • Arkansas	The West South Central region requires long-distance travel for goods leaving Maine, with an average shipment distance of over 2,000 miles. Trucks account for nearly all distribution to this division.

Mountain

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Arizona, Colorado, Idaho, New Mexico, Montana, Utah, Nevada, and Wyoming	• Biomedical Manufacturing • Forestry and Forest Products	• Idaho • Wyoming • Nevada	The long-distance nature of the Mountain region may limit the types of goods suitable for expanding into region markets. On average, shipments from Maine travel over 2,000 miles, primarily via both truck and rail.

Pacific

STATES	TARGET INDUSTRIES	TARGET STATES	SUPPLY CHAIN & DISTRIBUTION
Alaska, California, Hawaii, Oregon, and Washington	This region did not stand out with specific high-priority area opportunities. However, Advanced Manufacturing products is a a potential medium-priority opportunity.	• Alaska • California • Hawaii	The Pacific region is located the furthest distance from Maine, averaging over 2,000 miles, primarily by truck and rail. This may limit the goods that can be sold within these markets.

RECOMMENDATIONS

Recommendations are focused on the next steps for supporting businesses to grow their domestic trade efforts by **alleviating constraints and roadblocks and opening up trade opportunities through investment and infrastructure**. The recommendations also emphasize increasing collaboration for further research, creating opportunities for information sharing and open communication, building capacity, and prioritizing specific industries and geographies to sustainably grow domestic trade for the State of Maine.

1 **Investigate and further research transportation and logistics challenges and opportunities.**

While there is some transportation data on the distance of goods traveled and the mode of exporting goods out of Maine, Camoin Associates recommends conducting additional research and analysis focused on the needs, constraints, and opportunities of transportation infrastructure and logistics relative to supporting and expanding domestic trade.

By sharing the domestic trade research and analysis conducted to date and connecting with transportation and logistics stakeholders, Maine DECD can gain greater insight into critical program and infrastructure investments for expanding supply chains and supporting industries that are trying to grow domestic exports.

Specific stakeholders and partners for such collaboration include the Maine Port Authority, Maine Department of Transportation, Maine International Trade Center, transportation industry associations, rail providers, and freight professionals. This collaboration can take the form of a combination of sharing results through online or in-person session(s) and then forming a "working advisory group" to provide insights and collaboration over time.

2 **Prioritize communications and information sharing.**

As market research continues to be completed and industry data becomes available to the public, it is imperative that businesses are made aware of the data, but more importantly, they understand how to use it. We recommend convening industry-focused workshops, increasing presentations on market research, and hosting annual meetings with different industry leaders for continual networking and collaboration. Workshops and stakeholder engagement can include a mix of methods whether that is in-person events or virtual events that are recorded for future use and posted on the DECD website for digital engagement.

3 **Build business capacity.**

One of the largest hurdles in implementation is building capacity. Building business capacity starts by connecting with businesses to understand their domestic trade needs whether that relates to market knowledge, capital, workforce, supply chain concerns, etc. DECD has been doing this through the Maine Office of Business Development.

Business development professionals are using domestic trade data and research that offers important knowledge and market research tools to further assist in business development outreach and technical assistance. DECD has the potential to continue to provide market data and connect businesses to resources and programs that will support the execution of businesses breaking into new markets.

4 **Prioritize specific industries and geographies.**

Prioritizing specific regions and industries will start the planning process with less risk and higher success rates. Once new domestic markets are established, industries can expand into medium- or low-priority areas (harder and further markets) to continue building their brand and domestic trade markets.

FIRST PRIORITY FOCUS AREAS

Due to Proximity to Maine and Volume of Domestic Imports by Population and by Industry

New England

- Advanced Manufacturing
- Food and Beverage Manufacturing
- Logistics, Warehousing, and Transportation
- Retail Trade

East North Central

- Agriculture
- Clean Energy
- Construction
- Seafood
- Food and Beverage Wholesale
- Information Technology

West North Central

- Advanced Manufacturing
- Aerospace
- Agriculture
- Biomedical Manufacturing
- Clean Energy
- Seafood
- Food and Beverage Wholesale
- Forestry and Forest Products
- Information Technology
- Logistics, Warehousing, and Transportation
- Retail Trade

MACROECONOMIC CONTEXT AND COVID IMPACTS

Macroeconomic Context

Before identifying and assessing the viability of the State of Maine's ability to enter and succeed in new domestic markets in response to the COVID-19 pandemic, it is important to better understand the current macroeconomic performance of the state as well as the state's recovery after the pandemic. Camoin Associates examined Maine's economic demographics relative to the broader New England region and the US as a whole. The following metrics were used to provide macroeconomic context preceding the pandemic (from 2017-2019), during the pandemic (2019-2020), and recovery from the pandemic (2020-2022): Population, Gross Regional Product (GRP), Employment, Unemployment, Per Capita Disposable Income, Consumer Spending, and Consumer Sentiment.

Population

In the years directly preceding the pandemic (from 2017-2019), Maine gained a net population of over 12,500, representing 0.5% growth annually[1], on par with the United States and slightly outperforming regional population growth. During the pandemic, Maine continued to see population growth of 0.4%. The pandemic recovery from 2020-2022 posted significant gains, with almost 22,000 in net new population (0.8% annually) and far outpacing population growth in both New England and the nation during this time period.

Annual Population Growth Rates, 2017-2022

Legend: ■ Maine ■ New England ■ United States
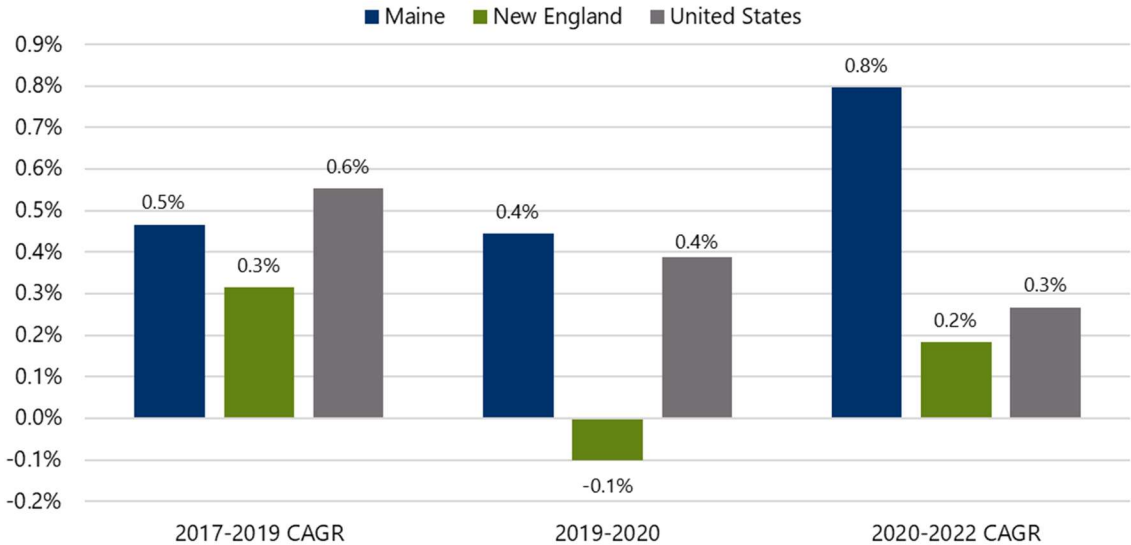
Source: Camoin Associates based on US Census Bureau Population Estimates and Decennial Census

Maine Population Growth
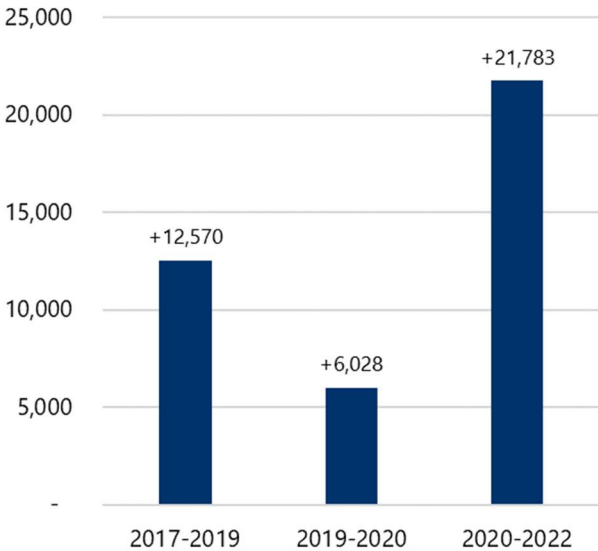
Source: Camoin Associates based on US Census Bureau Population Estimates

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[1] Compound Annual Growth Rates (CAGR) represent the average annual growth rate over a given time period. Here, it is used so that time periods of varying durations can be compared to one another. For example, it allows the period of 2017-2019, a two-year period, to be compared to growth rates during the period of 2022-2027, a five-year period.

Gross Regional Product

Maine saw strong growth in GRP from 2017-2022. In the two years preceding COVID-19, Maine's nominal GRP grew 15%, slightly higher than New England and the United States. It was also the only geography of the three to have GRP growth during the pandemic: +2% compared to -2% in both New England in the United States.

During the two years of pandemic recovery from 2020-2022, Maine saw GRP growth on par with the U.S. (both +21%) and higher than New England as a whole (19%).

Change in Nominal GRP, 2017-2022
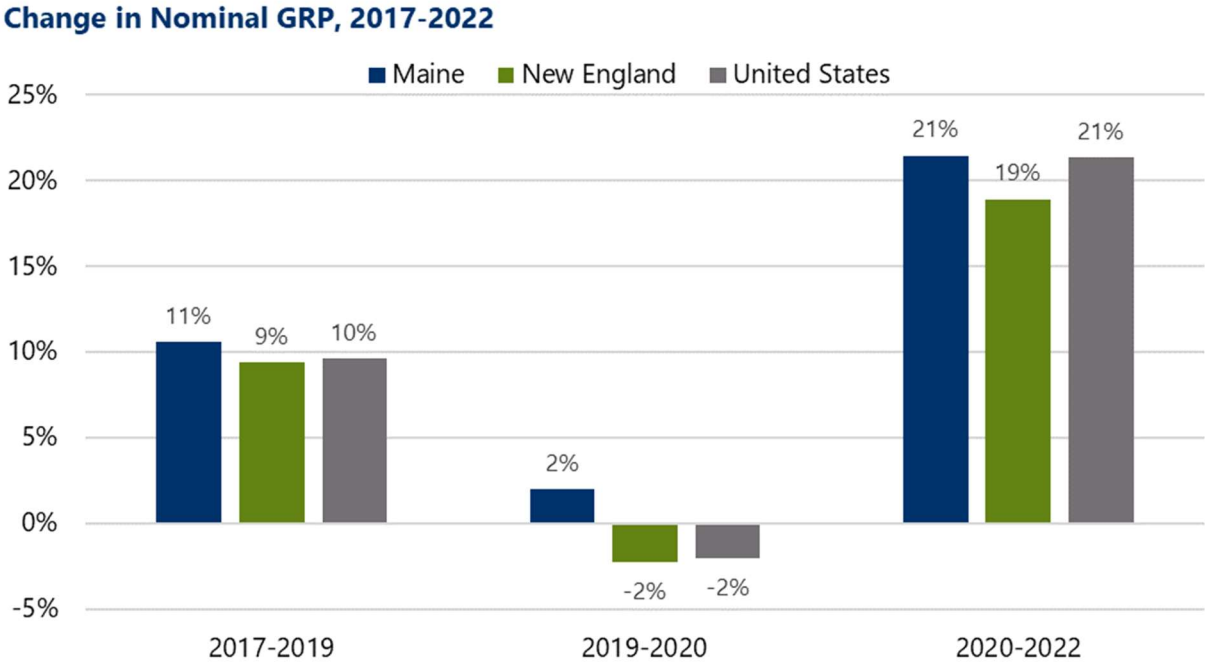
Source: Lightcast

Employment

Maine's employment was growing at a moderate clip prior to the COVID-19 pandemic, with the number of jobs increasing by 0.9% annually from 2017-2019, slightly ahead of New England but lagging the United States economy. During the height of the pandemic, the number of jobs declined by nearly 5%, on par with the contraction seen nationally and faring better than the region, which contracted by nearly 7%.

The pandemic recovery from 2020-2022 saw Maine's employment grow significantly, by 2.9% annually, on par with the nation and region's annual growth. However, Maine is projected to see employment grow at about half the rate of New England in the United States in the next five years, at about 0.6% annually compared to 1.4% in both New England and the United States.

Total Employment Change, Historic and Projected Annualized Growth

Legend: ■ Maine ■ New England ■ US

	2017-2019 CAGR	2019-2020	2020-2022 CAGR	2022-2027 CAGR
Maine	0.9%	-4.9%	2.9%	0.6%
New England	0.7%	-6.7%	3.0%	1.4%
US	1.3%	-5.1%	3.0%	1.4%
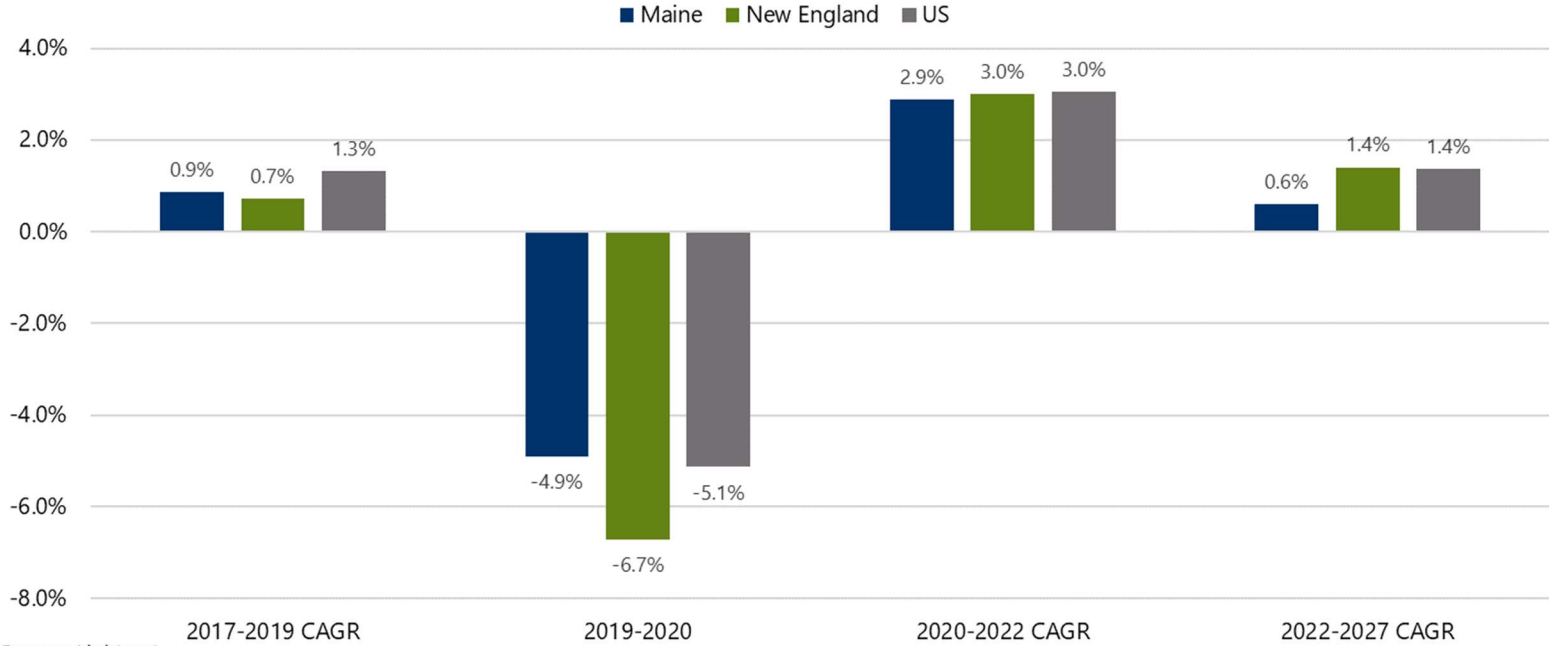
Source: Lightcast

Unemployment

Prior to COVID-19, the economy both in Maine and nationally was experiencing historic low levels of unemployment and a tight labor market. From February 2017 through February 2020, the unemployment rate averaged 3.2% in Maine, 3.4% in New England, and 3.9% in the United States. By May of 2020, the unemployment rate peaked at 9.4% in Maine, 13.5% in New England, and 13.2% in the nation. The recovery of the unemployment rate has varied in Maine, with a steep drop off by the end of 2020 but rising again at the start of 2021, before gradually recovering at the end of the year. In New England and the US, unemployment recovered more consistently in 2021 and 2022.

Throughout the last five years from 2017-2022, unemployment has consistently remained lower in Maine than in the region and nation in most months.

Unemployment Rate, 2017-Present
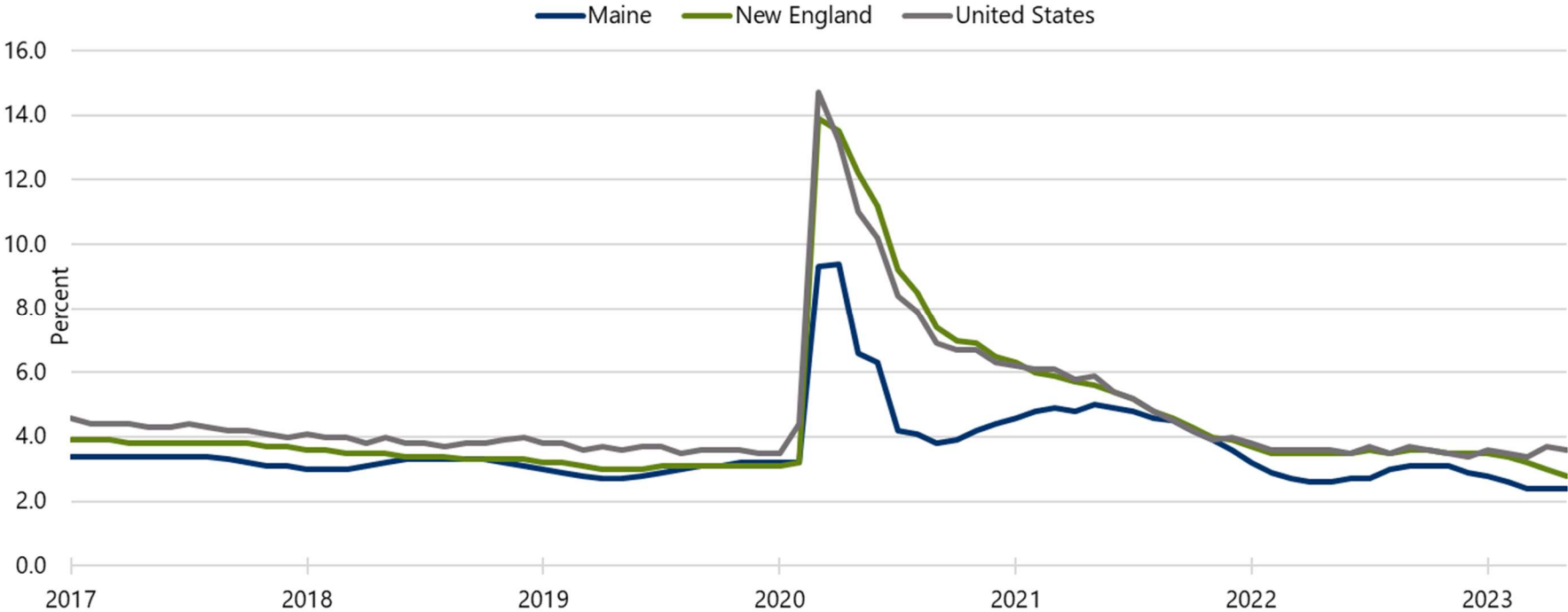
Source: US Bureau of Labor Statistics

Per Capita Disposable Income

Disposable income is a key external driver of industry performance for a multitude of the industry groups that were studied as a part of the domestic trade effort. For example, more disposable income may mean consumers are more likely to spend money on new furniture, higher-quality food products, retail items, or biomedical products and devices, among other goods and services. On the other hand, lower disposable income may lead to a substitution of goods and services that could also help or hurt the key industry groups.

Disposable income was boosted during the pandemic due to a multitude of federal and state income assistance programs, ranging from expanded unemployment insurance to stimulus payments, rent assistance, and more. Disposable income increased by 9% in Maine in 2020, faster than both the region and the nation, helping the state "catch up" to regional benchmarks. Per capita disposable income grew by an additional 3% annually during the pandemic recovery due to economic recovery, wage growth, and further stimulus programs that provided cash payments to individuals.

Per capita disposable income was $52,236 in Maine in 2022, slightly lower than the United States and well behind New England. However, it has grown significantly, from just over $41,000 in 2017. In total, Maine's per capita income grew 26% from 2017-2022, outpacing New England and the United States.

Per Capita Disposable Income: Annualized Growth Rates
Source: US Bureau of Economic Analysis
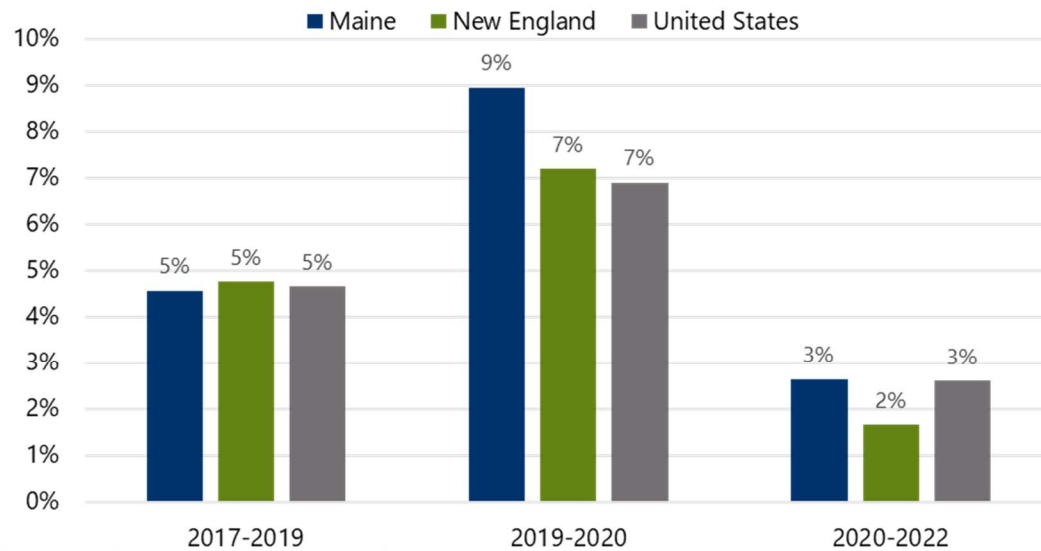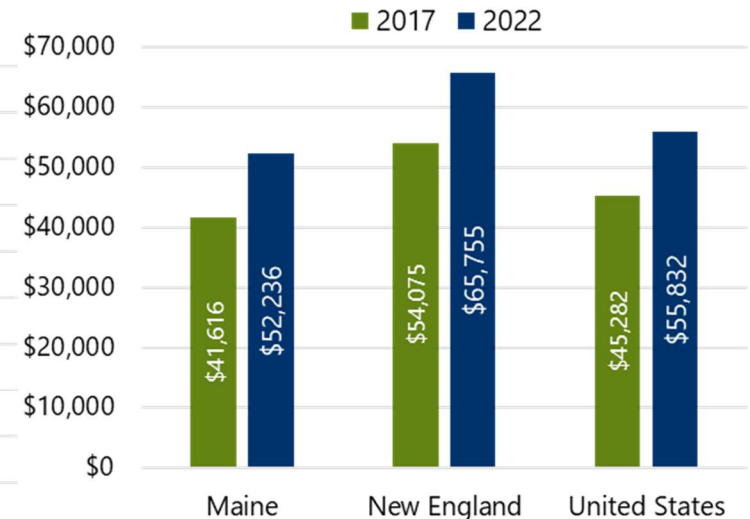
Per Capita Disposable Income
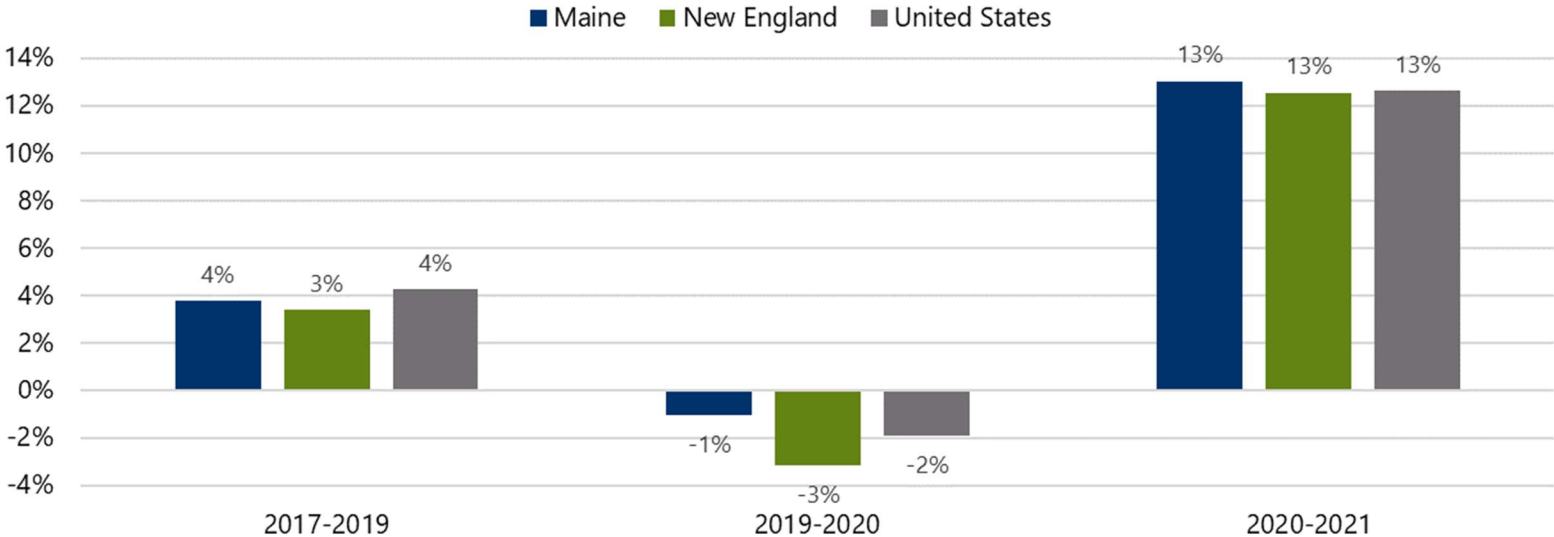Source: US Bureau of Economic Analysis

Consumer Spending

Another key external industry driver is consumer spending. The COVID-19 pandemic had a profound impact on consumer spending in 2020 and the years following. During shutdowns in 2020, consumers had fewer options for spending their money, unable to visit stores, restaurants, and entertainment in person and therefore stashed their income in savings. This led to pent-up demand during the recovery and therefore rapid growth in consumer spending across the economy.

Consumer spending declined by 1% in 2020, a smaller contraction than in New England (-3%) and the nation (-2%). During the pandemic recovery from 2020-2021, consumer spending grew by 13% in Maine, New England, and the United States. Overall, consumer spending increased by 21% in Maine from 2017-2022, representing 5% annual growth, outpacing growth in New England and in line with the nation.

Personal Consumption Expenditures (Consumer Spending): Annualized Growth Rates

Legend: ■ Maine ■ New England ■ United States

Period	Maine	New England	United States
2017-2019	4%	3%	4%
2019-2020	-1%	-3%	-2%
2020-2021	13%	13%	13%

Source: US Bureau of Economic Analysis

Consumer Sentiment

Consumer sentiment[2] in the United States was generally stable in the years leading up to the COVID-19 pandemic, staying relatively unchanged annually from 2017-2019. In 2020, sentiment rapidly declined by 15% amid the pandemic. Despite economic recovery from 2020-2022, consumer sentiment has continued to decline at a similar annual rate, falling 15% annually amid consumer concerns over high inflation, interest rates, and labor markets.

Consumer Sentiment Index, 2017-Present
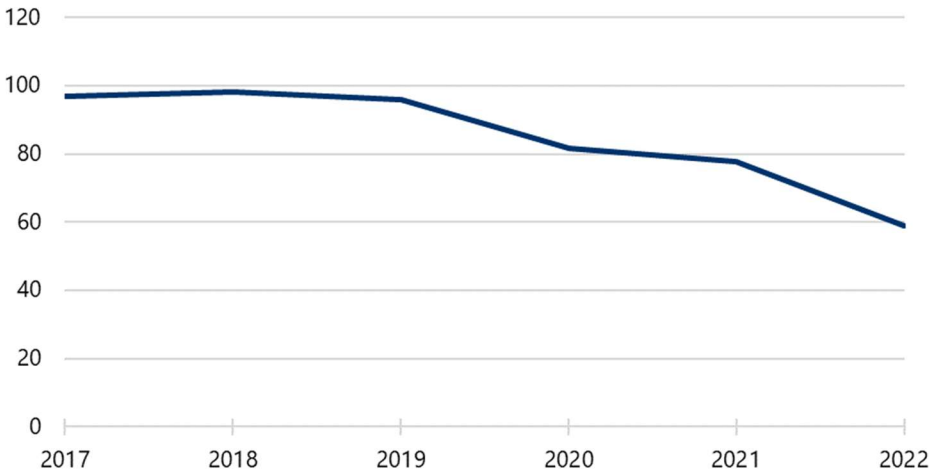
Source: University of Michigan Surveys of Consumers

Changes in Consumer Sentiment in the U.S.
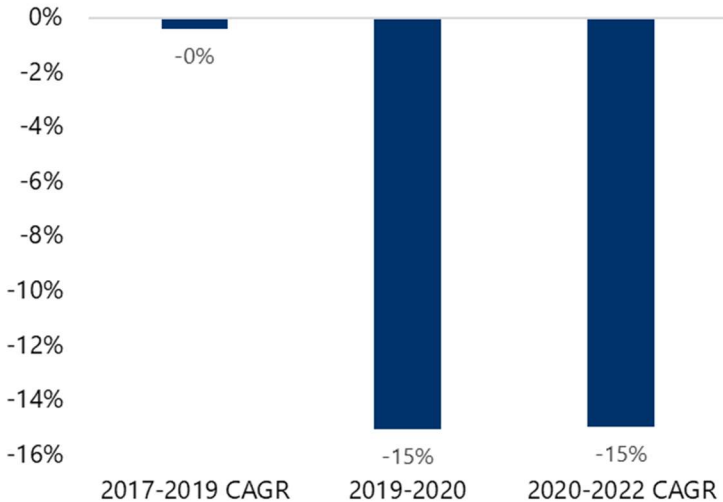
Source: University of Michigan Survey of Consumers

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[2] The University of Michigan Consumer Sentiment index is based on a monthly survey to gauge consumers' overall feelings and attitudes about their financial situation and the general economy in the short- and long-term. It is frequently used as a leading indicator of economic conditions in the United States. The index is set to equal 100 in the first quarter of 1966.

COVID-19 Impacts

After establishing the macroeconomic context of Maine's performance from 2017-2022, the next contextual data explored builds on the recent 2022 Domestic Trade Reports of Maine's key COVID-19-impacted industry groups. The following analysis reviews these reports to aggregate and isolate sales-related indicators to understand the Pre-COVID (2017-2019), COVID (2020), and COVID-recovery (2020-2022) data. The indicators analyzed include total employment, Gross Regional Product (GRP), and GRP Property Income.[3] The purpose of this analysis is to further understand the recent trends of the target industries (listed below) to provide historic context before analyzing potential markets that Maine industries have the potential to expand in.

- Advanced Manufacturing
- Aerospace
- Agriculture
- Biomedical Manufacturing
- Clean Energy

- Construction
- Fishing
- Food and Beverage Manufacturing
- Food and Beverage Wholesale
- Forestry and Forest Products

- Information Technology
- Logistics, Transportation, and Warehousing
- Retail

Methodology

The three key indicators of employment, GRP, and GRP Property income were compared across three periods: Pre-COVID (2017-2019), the economic peak of COVID-19 (2020), and the post-COVID-recession recovery (2020-2022). To compare consistently across various time periods, compound annual growth rates are used to demonstrate the annualized changes occurring in the economy in each of the three time periods. Industries were designated as having low, average, or high growth based on their relative performance compared to the state.

Key Findings

- The COVID-19 pandemic had a profound impact throughout the economy, with reverberations that changed the way many industries operate. Looking at employment and GRP, several key industry groups stand out as being the most impacted by COVID-19. These industries include Advanced Manufacturing; Aerospace; Food and Beverage Wholesaling; and Logistics, Transportation, and Warehousing (LTW), which fared worse than the overall economy in terms of both employment and GRP.

- During the COVID-19 recovery from 2020-2022, Seafood as well as Forestry and Forest Products stood out as industries that underperformed the overall economy. These industry groups had relatively low growth rates coming out of the pandemic for both employment and GRP. Construction underperformed the state's economy for GRP growth.

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[3] Property Income, sometimes called "non-labor income" or "profits," is generally what is left after businesses make payments for labor, taxes on production, and the purchase of produced inputs. It is one of the four components of GRP, alongside earnings (labor income), taxes on production and imports, and subsidies. (Lightcast Knowledge Base)

- While many industries met or exceeded state growth rates during and following the height of the pandemic, COVID-19 still impacted the industries' health as employment and GRP growth rates were reduced below historical trends.

- The pandemic recovery provided favorable conditions for some of the key industry groups, leading to growth rates well above historical trends. Biomedical Manufacturing, Information Technology, Retail, and LTW had strong employment growth during 2020-2022.

- Looking at GRP, Advanced Manufacturing, Clean Energy, Construction, Food, IT, Retail, and LTW posted strong growth rates compared to the overall state economy from 2020-2022.

Comparative Performance Analysis

To better understand how key industry groups performed before (2017-2019), during (2019-2020), and following (2020-2022) the COVID-19 pandemic, designations of red, yellow, and green were assigned to each key industry group for each indicator. Industries were marked as having low growth (red) if they underperformed the state's overall growth rate for a given indicator by one percentage point or more. Conversely, industries were marked as having high growth (green) if they outperformed the state's overall growth by one percentage point or more. Industries that had growth rates within one percentage point of the state's overall growth are marked as having medium growth (yellow).

Maine Comparative Industry Performance, 2017-2019 (annualized)

	Employment	GRP	GRP Property Income
Advanced Manufacturing	🟢 4.0%	🟢 6.8%	🟡 5.4%
Aerospace	🟢 7.3%	🟡 6.0%	🔴 3.2%
Biomedical Manufacturing	🟢 8.8%	🟢 11.6%	🟢 10.3%
Clean Energy	🟢 4.9%	🟢 6.6%	🔴 1.2%
Construction	🟢 2.6%	🟢 6.4%	🔴 0.2%
Food	🟡 1.2%	🟡 5.0%	🟢 7.0%
Agriculture	🟡 1.6%	🔴 -0.2%	🔴 1.0%
Seafood	🔴 -2.0%	🟢 7.1%	🟢 17.2%
Food Manufacturing	🟢 2.8%	🟢 7.2%	🟢 10.7%
Food Wholesaling	🟡 1.6%	🔴 4.0%	🔴 0.6%
Forestry and Forest Products	🔴 -0.6%	🟢 7.8%	🟢 8.9%
Information Technology	🟢 6.4%	🟢 10.7%	🟢 10.3%
Retail	🔴 -0.5%	🟡 4.8%	🟡 5.2%
Logistics, Transportation, and Warehousing	🔴 -2.8%	🔴 2.6%	🔴 -4.0%
Total Maine	**0.9%**	**5.2%**	**5.3%**
Total US	**1.3%**	**4.7%**	**4.7%**

Source: Lightcast, Camoin Associates

Note: Annualized growth rates reflect the average growth rate that occurred annually instead of the total growth rate that occurred over the given time period.

Pre-Pandemic

Several industries stand out as being high performers prior to the pandemic: **Biomedical Manufacturing, Food Manufacturing, and Information Technology** are designated as high growth on all three indicators from 2017-2022.

Agriculture, Food Wholesaling, Retail, and LTW are average to low performers, being designated as medium or low for all three indicators from 2017-2019.

Overall, these key industry groups tend to be high performers before the COVID-19 pandemic, with **10 of the 14 having high growth on at least one indicator from 2017-2022.**

COVID-19 Trough

Maine Comparative Industry Performance, 2019-2020 (annual change)

	Employment		GRP		GRP Property Income	
Advanced Manufacturing	🔴	-6.5%	🔴	-5.1%	🔴	-3.0%
Aerospace	🔴	-6.2%	🔴	-12.2%	🔴	-16.6%
Biomedical Manufacturing	🟢	1.3%	🟢	20.1%	🟢	22.0%
Clean Energy	🟢	3.9%	🟢	6.6%	🟢	15.9%
Construction	🟢	1.4%	🟢	5.3%	🟢	37.4%
Food	🟢	3.9%	🟢	4.6%	🟢	19.3%
Agriculture	🟢	10.7%	🟢	4.3%	🟢	38.6%
Seafood	🟢	16.4%	🔴	-2.5%	🔴	5.1%
Food Manufacturing	🟢	-3.1%	🟢	12.5%	🟢	19.5%
Food Wholesaling	🔴	-6.5%	🔴	-0.3%	🟡	9.0%
Forestry and Forest Products	🟢	0.8%	🟢	5.6%	🟢	15.3%
Information Technology	🟢	2.9%	🟢	5.2%	🔴	1.3%
Retail	🟡	-5.2%	🟢	5.1%	🟢	27.6%
Logistics, Transportation, and Warehousing	🔴	-7.2%	🔴	-6.5%	🔴	5.3%
Total Maine		**-4.9%**		**2.0%**		**8.0%**
Total US		**-5.1%**		**-2.0%**		**-1.1%**

Source: Lightcast, Camoin Associates

Several industries stand out as being particularly resilient during the pandemic: **Biomedical Manufacturing, Clean Energy, Construction, Food (overall), Agriculture, Food Manufacturing, and IT performed better than the state economy on all three indicators** from 2019-2020.

Advanced Manufacturing, Aerospace, and LTW are low-growth industry groups, being designated as low for all three indicators from 2019-2020.

Overall, these key industry groups tend to be high performers before the COVID-19 pandemic, with **10 of the 14 having high growth on at least one indicator from 2017-2022.**

COVID-19 Recovery

Maine Comparative Industry Performance, 2020-2022 (annualized)

	Employment		GRP		GRP Property Income	
Advanced Manufacturing	🟡	3.4%	🟢	11.2%	🔴	12.1%
Aerospace	🟡	3.0%	🟡	10.3%	🔴	11.2%
Biomedical Manufacturing	🟢	15.4%	🟡	10.2%	🔴	11.3%
Clean Energy	🟢	4.6%	🟢	11.4%	🔴	9.6%
Construction	🟡	2.5%	🔴	8.5%	🔴	-3.2%
Food	🟡	3.2%	🟢	11.5%	🔴	3.8%
Agriculture	🟢	6.4%	🟢	25.6%	🔴	11.2%
Seafood	🔴	-1.3%	🔴	1.4%	🔴	-1.4%
Food Manufacturing	🟡	3.9%	🟡	10.3%	🔴	-2.9%
Food Wholesaling	🟡	2.1%	🟡	11.0%	🔴	11.9%
Forestry and Forest Products	🔴	-2.0%	🔴	7.0%	🔴	9.7%
Information Technology	🟢	8.2%	🟢	17.8%	🟢	22.5%
Retail	🟡	2.8%	🟡	10.4%	🔴	12.2%
Logistics, Transportation, and Warehousing	🟡	2.0%	🟢	11.9%	🟢	17.6%
Total Maine		**2.9%**		**10.2%**		**13.4%**
Total US		**3.0%**		**10.2%**		**13.3%**

Source: Lightcast, Camoin Associates

Note: Annualized growth rates reflect the average growth rate that occurred annually instead of the total growth rate that occurred over the given time period.

In the two years of economic recovery following the peak of the COVID-19 recession, the studied industry groups tended to struggle compared to the overall economy relative to prior to and during the pandemic. **Only one key industry group performed better than the state on all three indicators – Information Technology. Clean Energy, Agriculture, and LTW performed better on two indicators.**

Seafood and Forestry & Forest Products had low growth during the recovery and were designated as low for all three indicators from 2020-2022.

In total, **seven of the key industry groups were designated as either low- or medium-growth for all three indicators.**

Employment

All key industry groups saw impacts from the COVID-19 pandemic in 2020. While many still saw positive growth from 2019-2020, growth rates were significantly reduced compared to historic trends. For example, Biomedical Manufacturing grew by 1% from 2019-2020 despite seeing 9% annual growth in the two years prior, from 2017-2019. Three industry groups saw declines from 2019-2020: Advanced Manufacturing (-6%), Retail (-5%), and Logistics, Transportation, and Warehousing (-7%).

Many of the key industry groups have recovered following these COVID-19 impacts. Biomedical Manufacturing, Food, IT, Retail, and Logistics, Transportation, and Warehousing saw annualized growth rates from 2020-2022 that surpassed their pre-pandemic trends.

Forestry and Forest Products and Food saw a boost from 2019-2020 during the height of the pandemic. Employment in the Food sector grew by 4% during this time period, compared to annual growth of 1% prior to the pandemic and 3% during the recovery. Agriculture and Seafood drove this growth, while food manufacturing and wholesaling saw employment declines during the pandemic. Forestry and Forest Products grew by 1% during the pandemic, despite employment contracting both prior to the pandemic and during the recovery.

Overall, in Maine, the economy grew 1% at an annualized rate from 2017-2019, declined by 5% during the height of the pandemic, and has grown by 3% annually in the years following. In this sense, Biomedical Manufacturing, Clean Energy, and IT have performed better than the overall state economy during the pandemic recovery.

COVID-19 Affected Industries in Maine: Annualized Employment Changes 2017-2022

Source: Lightcast, Camoin Associates

Legend: 2017-2019 CAGR, 2019-2020, 2020-2022 CAGR
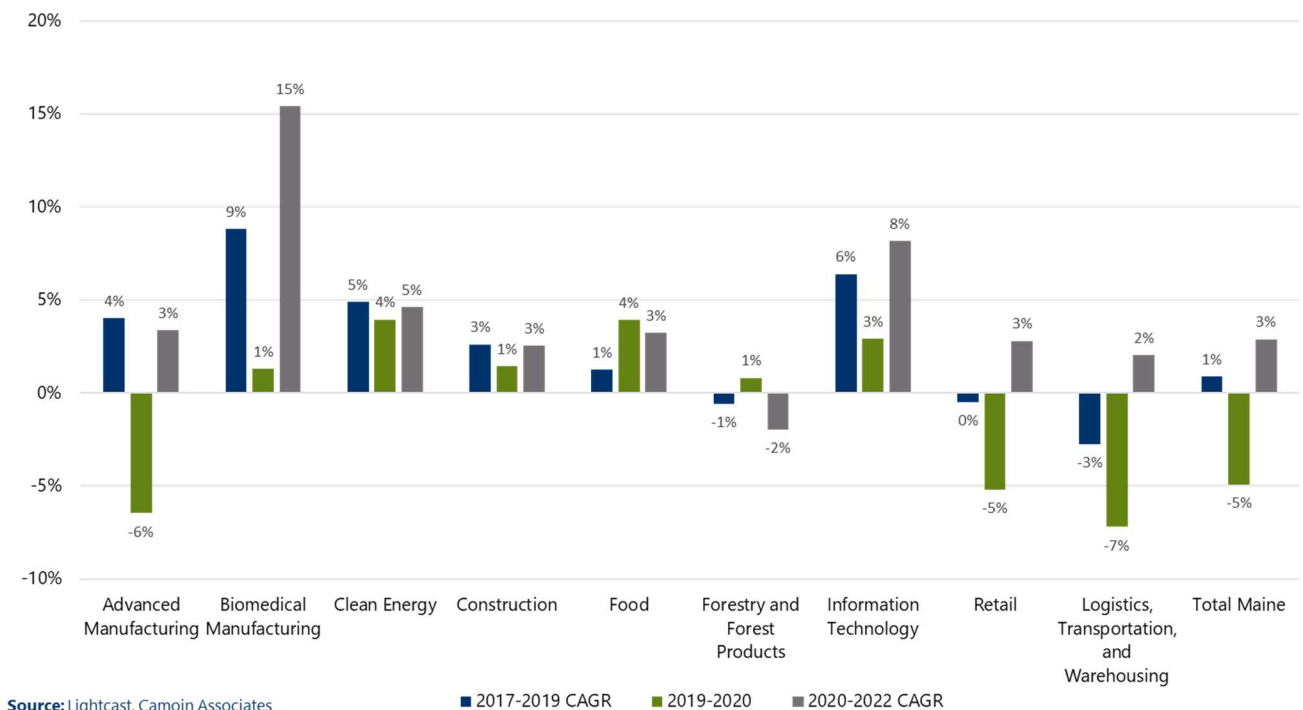
Gross Regional Product (GRP)

Gross Regional Product (GRP) generally performed better than employment during the pandemic, although many key industry groups saw reduced growth rates compared to historic trends. Advanced Manufacturing (-5%) and Logistics, Transportation, and Warehousing (-7%) are the only industry groups that saw GRP contract during the height of the pandemic. Most industry groups had GRP growth rates of about 5%-7% from 2019-2020, outpacing the overall Maine economy; Biomedical Manufacturing grew at 20%. Two sectors saw growth rates in 2020 that were well below pre-pandemic annualized growth: Forestry and Forest Products and IT. Many other sectors saw growth rates that were similar to pre-pandemic trends, including Clean Energy, Construction, Food, and Retail.

In the years following the pandemic, from 2020-2022, most industry groups grew approximately in line with the overall state economy's annualized growth rate of 10%. Advanced Manufacturing; Biomed Manufacturing; Clean Energy; Construction; Food; Retail; and Logistics, Transportation, and Warehousing grew between 9%-12% at annualized rates. Forestry and Forest Products (7% annually) slightly underperformed the general economy while IT outperformed overall growth (18%).

COVID-19 Affected Industries in Maine: Annualized GRP Changes 2017-2022
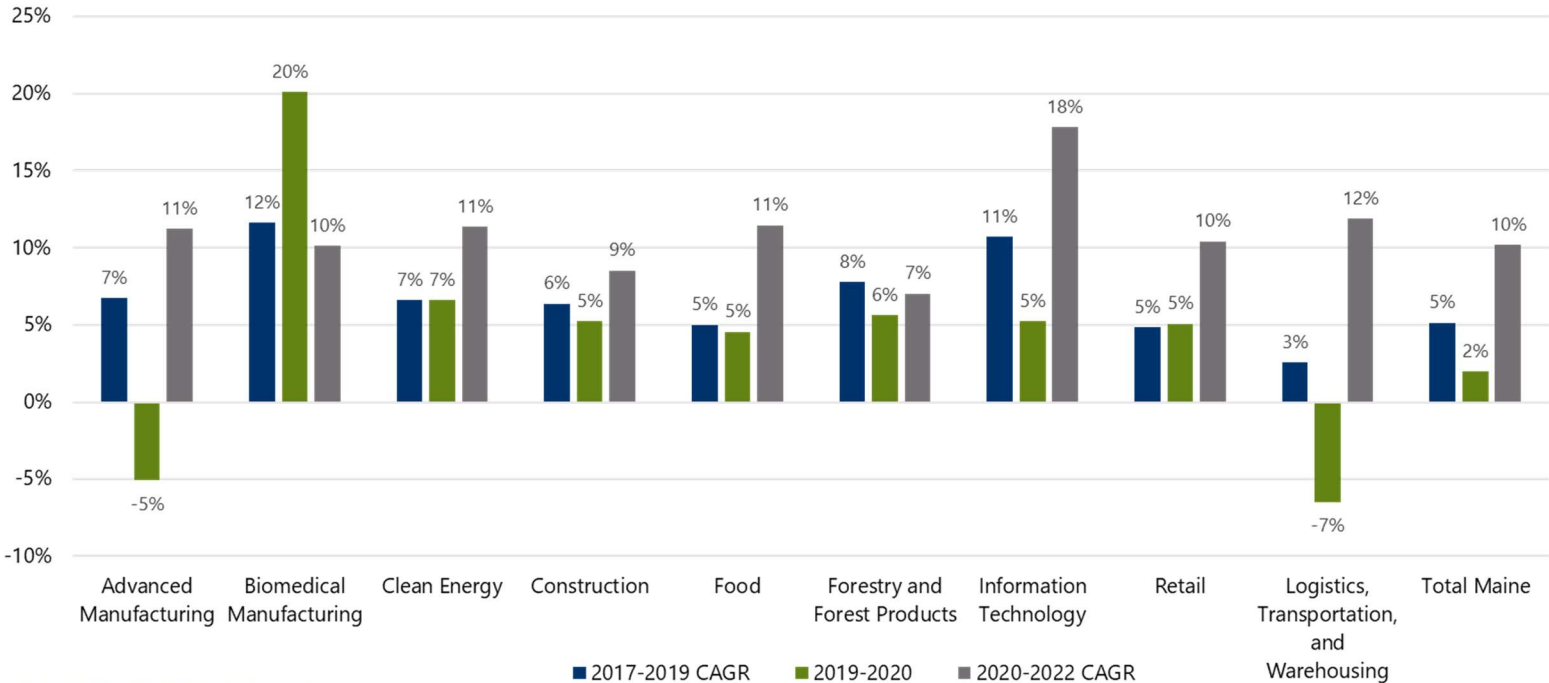
Source: Lightcast, Camoin Associates

GRP Property Income (Profits)

GRP Property Income, sometimes called "profits," typically is what is left after businesses pay for inputs such as labor, taxes, and the cost of produced inputs. This indicator can serve as a proxy for the strength of an industry's revenues and profits.

Overall, in Maine's economy, Property Income increased at an annual rate of 5% in the two years preceding the pandemic, 8% at the height of the pandemic, and 13% during the pandemic recovery. Across the key industry groups, Property Income grew at varied rates during and following the pandemic. Biomedical Manufacturing; Clean Energy; Construction; Food; Forestry and Forest Products; Retail; and Logistics, Transportation, and Warehousing saw growth that was higher at the height of the pandemic than during the two years pre-pandemic. Other industry groups, such as Advanced Manufacturing and IT either declined or had significantly lower growth than annualized pre-pandemic rates.

COVID-19 Affected Industries in Maine: Annualized GRP Property Income (Profits) Changes 2017-2022
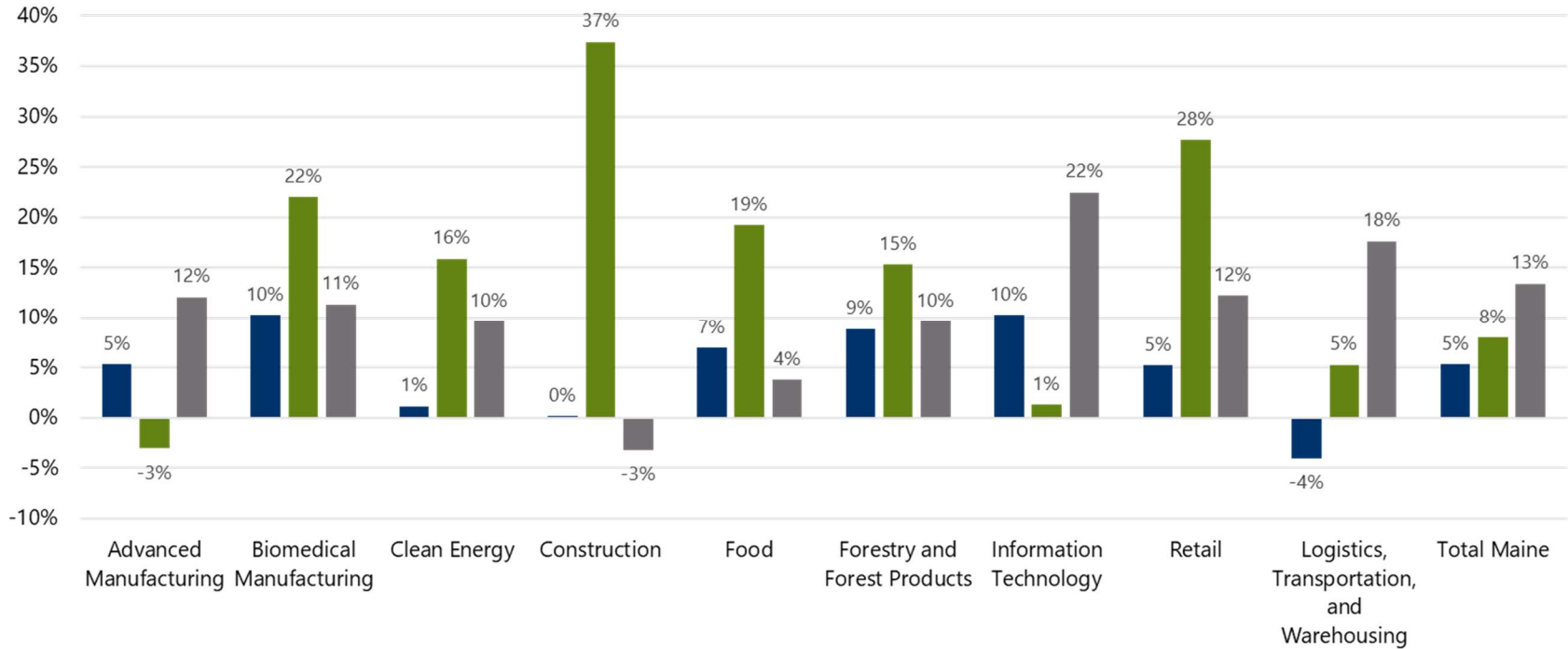
Source: Lightcast, Camoin Associates

■ 2017-2019 CAGR   ■ 2019-2020   ■ 2020-2022 CAGR

GEOGRAPHIC COMPETITIVE ANALYSIS

This section provides a geographic assessment of Maine's COVID-impacted industry performance across the nation in terms of employment concentration, domestic imports, domestic imports per population, and average distance travelled of goods shipped from Maine to each of the regions. The purpose behind this assessment is to further evaluate where opportunities exist to further expand domestic trade for Maine businesses across the nation.

The geographic assessment is sorted by region and further industry related analysis can be found in the Appendix.

COVID-Impacted Industries:

- Advanced Manufacturing
- Aerospace
- Agriculture
- Biomedical Manufacturing
- Clean Energy
- Construction
- Fishing
- Food and Beverage Manufacturing
- Food and Beverage Wholesale
- Forestry and Forest Products
- Information Technology
- Logistics, Transportation, and Warehousing
- Retail

Key Terms

Employment Concentration is a Location Quotient calculation. Location Quotient (LQ) is a way of quantifying how concentrated a characteristic of a particular region is compared to the nation. In this case, an industry's share of employment. The LQ is the calculation that reveals what makes a given region "unique" in comparison to the nation. With an employment concertation of one (1) being the national average and values greater than one (1) indicating that the industry is more concentrated at the location than the national average and a value less than one (1) indicating the inverse.

Domestic Imports show the amount of money that is spent by all industries located in the given state in exchange for goods or services produced by an industry located outside the given state. Money leaves the region, and a good or service is brought into the region and consumed. The imports figure does not directly include wages of employees in the industry from which goods or services were purchased. Money used to purchase imported goods and services will likely be indirectly used to pay employees of the industry from which the good or service was purchased but the imports figure is agnostic of what the industry producing the good or service will do with the money.

Methodology To prioritize the greatest economic potential for Maine businesses to enter different domestic markets, Camoin analyzed employment concentrations, domestic imports, domestic imports per population, and average shipping distances within each target industry across each region in the US. Using a tiered ranking system, we categorized industry performance across regions into top, middle, or bottom third tiers based on the metrics value in a specific region relative to the other. **The most promising opportunities emerged in regions where**:

1. The industry ranked in the top third for domestic imports per population, indicating a substantial demand for industry-related goods relative to the local population, and
2. Regions ranked in the bottom third for employment concentration, suggesting a limited native workforce, meaning they would rely on continued imports to meet demand.

While we considered average shipping distance, its significance varied depending on the specific industry and the nature of the goods being transported, making it a less critical factor in our decision-making process.

Regions of Study

The United States Census Bureau defines the country's regions and divisions as indicated below. The West, Midwest, South, and Northeast make up the four regions of the U.S., while each region is further divided into subdivisions. These regions and subdivisions will be referenced throughout the following section of the report.
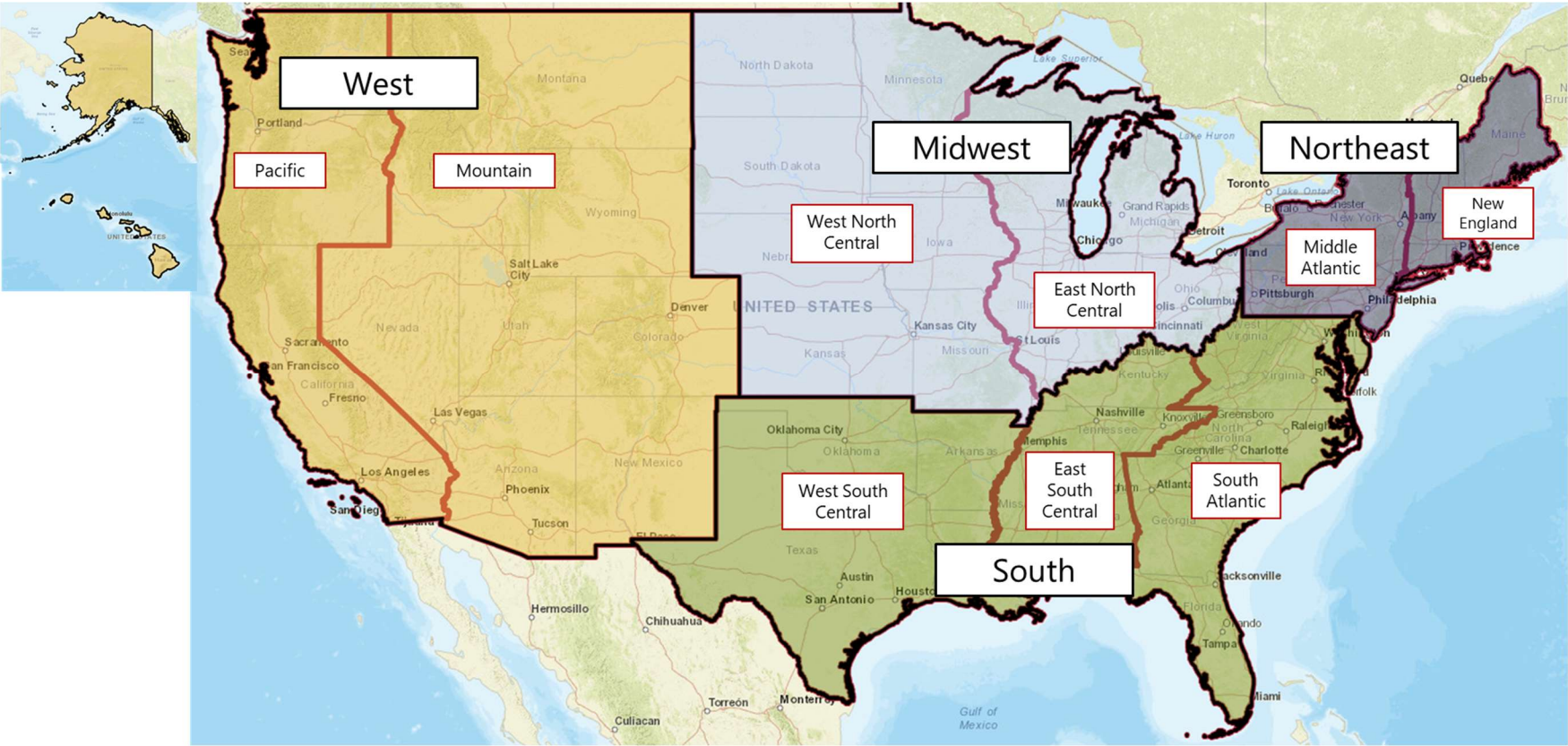
Domestic Trade Market Area Key Findings

New England is made up of six states: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont

- Based on the target industries performance, *Vermont, New Hampshire, Connecticut,* and *Massachusetts* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The DECD target industries with <u>the most potential for success</u> for Maine <u>in the region</u> are: **Advanced Manufacturing; Food and Beverage Manufacturing; Logistics, Warehousing, and Transportation; and Retail Trade**

- Maine lies within New England, and therefore domestic trade is within close proximity. This allows Maine to trade products that typically travel only short distances. The primary method of distribution to New England is trucking.

The Mid-Atlantic Division is made up of three states: New Jersey, New York, and Pennsylvania

- Based on the target industries performance, *New York and New Jersey* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The DECD target industries with <u>the most potential for success</u> for Maine <u>in the region</u> are: **Construction and Food and Beverage Manufacturing.**

- The Mid-Atlantic is in relatively close proximity to Maine, which allows for significant trade volumes of Maine's products. About 35% of freight leaving Maine goes to the Mid-Atlantic division.

The East North Central Division is made up of five states: Indiana, Illinois, Michigan, Ohio, and Wisconsin

- Based on the target industries performance, *Indiana, Wisconsin, and Michigan* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The DECD target industries with <u>the most potential for success</u> for Maine <u>in the region</u> are: **Agriculture; Clean Energy; Construction; Seafood; Food and Beverage Wholesale; and Information Technology.**

- East North Central is located within medium distance from Maine, with freight traveling an average of 750-1,500 miles. While the primary freight mode for this division is trucking, rail and multi-modal freight are also key to delivering Maine's products to the area.

Domestic Trade Market Opportunities | State of Maine DECD

The West North Central Division is made up of seven states: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota

■ Based on the target industries performance, *North Dakota, South Dakota, Nebraska, and Kansas* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

■ The DECD target industries with the most potential for success for Maine in the region are: **Advanced Manufacturing; Aerospace; Agriculture; Biomedical Manufacturing; Clean Energy; Seafood; Food and Beverage Wholesale; Forestry and Forest Products; Information Technology; Logistics, Transportation, and Warehousing; and Retail Trade.**

■ West North Central is fairly long-distance from Maine, with shipments traveling an average of 1,000-2,000 miles. The most common mode of freight for goods heading to West North Central is trucks, though multi-modal freight also represents about a third of distribution.

The South Atlantic Division is made up of nine geographies: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, and West Virginia

■ Based on the target industries performance, *Delaware, Virginia, Maryland*, and *West Virginia* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

■ The DECD target industries with the most potential for success for Maine in the region is **Aerospace** however, **Biomedical Manufacturing, Food and Beverage Manufacturing,** and **Seafood** are medium-priority opportunities.

■ The South Atlantic has the benefit of being on the East Coast with Maine, though located at a slightly longer distance, with shipments from Maine averaging 750-1,500 miles of travel. 5% of freight leaving Maine is going to the South Atlantic, with Trucks being the most common method of transport.

The East South-Central Division is made up of four states: Alabama, Kentucky, Mississippi, and Tennessee

■ Based on the target industries performance, *Kentucky* and *Mississippi* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

■ The DECD target industries with the most potential for success for Maine in the region are: **Advanced Manufacturing; Aerospace; Biomedical Manufacturing; Clean Energy; Construction; Seafood; Food and Beverage Manufacturing and Wholesale; Forestry and Forest Products; Information Technology; Logistics, Transportation, and Warehousing; and Retail Trade.**

■ Freight leaving Maine for East South-Central travels an average 1,000-1,500 miles, with trucks accounting for approximately 95% of distribution to the division.

The West South-Central Division is made up of four states: Arkansas, Louisiana, Oklahoma, and Texas

- Based on the target industries performance, *Texas* and *Arkansas* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The West South Central region did not stand out with specific high priority area opportunities however, **Biomedical Manufacturing** and **Information Technology** are potential medium-priority opportunities.

- The West South Central requires long-distance travel for goods leaving Maine, with an average shipment distance of over 2,000 miles. Trucks account for nearly all distribution to this division.

The Mountain Division is made up of eight states: Arizona, Colorado, Idaho, New Mexico, Montana, Utah, Nevada, and Wyoming

- Based on the target industries performance, *Idaho, Wyoming*, and *Nevada* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The DECD target industries with the most potential for success for Maine in the region in 2022 are: **Biomedical Manufacturing and Forestry and Forest Products.**

- The long-distance nature of the Mountain Division may limit the types of goods suitable for expanding into the Mountain division markets. On average, shipments from Maine travel over 2,000 miles, primarily via both truck and rail.

The Pacific Division is made up of five states: Alaska, California, Hawaii, Oregon, and Washington

- Based on the target industries performance, *Alaska, California*, and *Hawaii* represent the top opportunity states for Maine to engage in more domestic trade activity within this region.

- The Pacific region did not stand out with specific high priority area opportunities however, **Advanced Manufacturing** products is a medium-priority opportunity.

- The Pacific Division is located the furthest distance from Maine, averaging over 2,000 miles, primarily by truck and rail. This may limit the goods that can be sold within these markets.

Regional Context

The South has the largest population in 2023 among the four Census regions, at 130 million people. The South also had the fastest-growing population in the decade from 2010-2020 (+10%), followed closely by the Western region (+9%). The Northeast (4%) and Midwest (3%) saw little population growth during this time period.

In the next five years, only the Southern and Western regions are projected to experience population growth, while the Northeast and Midwest have 0% projected population growth.

Household income is highest in the West and Northeast, both reaching over $80,000 for median household income in 2023. Income is more moderate in the South and Midwest, at about $66,000 and $68,000 in 2023, respectively. The Northeast and West also account for the largest shares of population with bachelor's degrees or higher, at 39.0% and 34.9%, respectively. New England is by far the highest-educated division, with 42.1% of its population holding a bachelor's degree or higher.

Demographic and Socioeconomic Overview of Regions & Divisions

Region/Division	2023 Total Population	2010-2020 10-Year Population Growth	2023-2028 Projected Population Growth	2023 Median Household Income	Bachelor's Degree or Higher %
Northeast	**57,818,209**	**4%**	**0%**	**$80,173**	**39.0%**
New England	15,267,228	5%	0%	$85,803	42.1%
Middle Atlantic	42,550,981	4%	0%	$78,334	37.9%
South	**130,023,992**	**10%**	**3%**	**$65,689**	**32.1%**
South Atlantic	68,035,389	11%	3%	$69,501	34.5%
East South Central	19,730,768	5%	1%	$57,327	27.4%
West South Central	42,257,835	12%	4%	$64,449	30.3%
Midwest	**69,384,750**	**3%**	**0%**	**$68,187**	**32.6%**
East North Central	47,499,824	2%	0%	$67,561	32.2%
West North Central	21,884,926	5%	1%	$69,575	33.6%
West	**80,243,234**	**9%**	**2%**	**$82,476**	**34.9%**
Mountain	25,869,903	13%	3%	$74,543	33.8%
Pacific	54,373,331	8%	1%	$87,569	35.5%

Source: Esri

Regional GRP

	2022
Northeast Region	**$5,035,768,064,280**
New England Division	$1,327,970,665,990
Middle Atlantic Division	$3,707,797,398,290
South Region	**$8,708,639,102,750**
South Atlantic Division	$4,605,162,837,200
East South Central Division	$1,144,425,640,720
West South Central Division	$2,959,050,624,820
Midwest Region	**$4,827,654,472,410**
East North Central Division	$3,259,246,733,990
West North Central Division	$1,568,407,738,420
West Region	**$6,448,099,450,420**
Mountain Division	$1,736,117,926,080
Pacific Division	$4,711,981,524,340

Source: Lightcast

The South has the highest concentration of GRP in the Unted States, at $8.7 trillion in 2022, driven by the South Atlantic. This is followed by the West region, with an annual GRP of $6.4 trillion in 2022.

The Pacific Division had the highest GRP of all divisions in 2022, at $4.7 trillion, closely followed by the South Atlantic with $4.6 trillion GRP. Several of the divisions have relatively low concentrations of GRP, including the East South Central, New England, West North Central, and Mountain Divisions, which all had GRP under $2 trillion in 2022.

Supply Chain and Distribution

It is important to consider the current supply chain and distribution conditions of Maine's target industries, including how goods are transported out of the state and how far they typically go. While supply chain conditions affect all commodities, each industry faces different logistics needs. Expanding access to domestic markets hinges significantly on the availability and efficiency of transportation access and infrastructure. That said, it is essential to understand which goods can feasibly be transported to new market areas to understand where new opportunities can be found. In pursuit of a thorough understanding of the transportation of goods originating from Maine's target industries, the following section will examine the mode of transportation employed and the average distances that goods travel from Maine within each industry.

Methodology

Data used in this section was collected via the Freight Analysis Framework Version 5, a data product developed by the National Transportation Research Center in the Oak Ridge National Laboratory. This research combines data from the Commodity Flow Survey and other data from the Bureau of Transportation Statistics and Federal Highway Administration.

The analysis below investigates the commodities, modes of transportation, distances of shipments, and destination of trade relating to Maine's target domestic trade sectors. It includes only domestic trade (excludes international trade) and only trade to destinations outside of Maine, excluding all intrastate distribution from analysis. The analysis explores how the mode of transportation, average shipping distance, destination states, and volume/value of goods shipped differs across the commodity groups relating to the target sectors.

Domestic export shipments from Maine primarily occur via truck freight. Across all target sector commodities, 87% of domestic exports are transported on trucks.

- Other modes of distribution for target sector commodities include Multiple modes & mail (9%), rail (4%), and pipeline (0.2%). Water transportation accounted for 0% of domestic shipping activity for this set of commodities.

- Advanced Manufacturing Construction, Food & Beverages, Advanced Manufacturing, and Pharmaceuticals have the highest shares of truck shipment, with between 97%-100% of freight for these commodities occurring over truck freight.

- Forest Products had the lowest share of shipments occurring on trucks, at only 66%. Multiple modes (24%) and rail (11%) account for the other major modes of distribution for Forest Products.

Mode of Shipment for Maine Domestic Exports, by Key Commodities (2022)
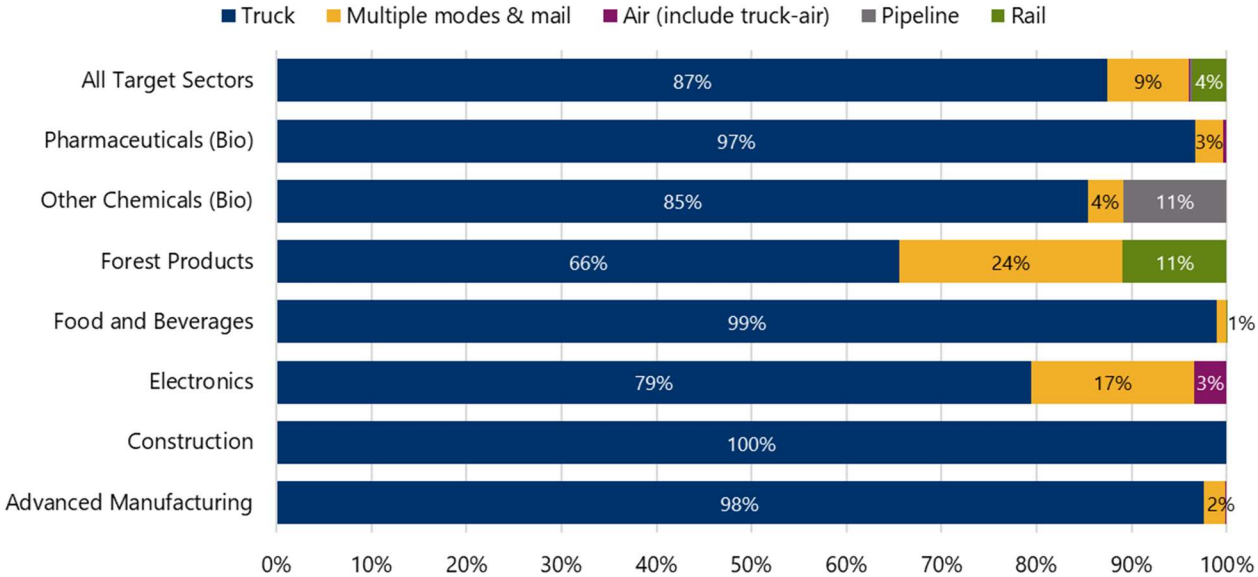
Legend: ■ Truck ■ Multiple modes & mail ■ Air (include truck-air) ■ Pipeline ■ Rail

| Commodity	Truck	Multiple modes & mail	Other
All Target Sectors	87%	9%	4%
Pharmaceuticals (Bio)	97%		3%
Other Chemicals (Bio)	85%	4%	11%
Forest Products	66%	24%	11%
Food and Beverages	99%		1%
Electronics	79%	17%	3%
Construction	100%		
Advanced Manufacturing	98%		2%

Source: US Department of Transportation, Federal Highway Administration, Bureau of Transportation Statistics, Freight Analysis Framework 5
Note: Based on tons of goods shipped

Medium-range shipments averaging between 250-499 miles make up the largest share of Maine's domestic exports, accounting for about 43% of tonnage in 2022.

- About one-third of commodities in the target sectors were short-range, meaning they traveled an average of less than 250 miles. Meanwhile, about 13% traveled over 1,000 miles on average.
- Construction products (including building stone, gravel, and natural sand) tends to travel the shortest distances, with about 99% moving less than an average of 250 miles.
- Pharmaceuticals are shipped the longest distances, with 97% moving an average of over 750 miles
- Meanwhile, Food and Beverage products stand out as traveling mostly to medium-range destinations. About two-thirds of Maine's domestic exports of Food & Beverages traveled an average of 250-499 miles in 2022.

Average Weighted Distance of Domestic Shipments from Maine, by Key Commodities (miles)
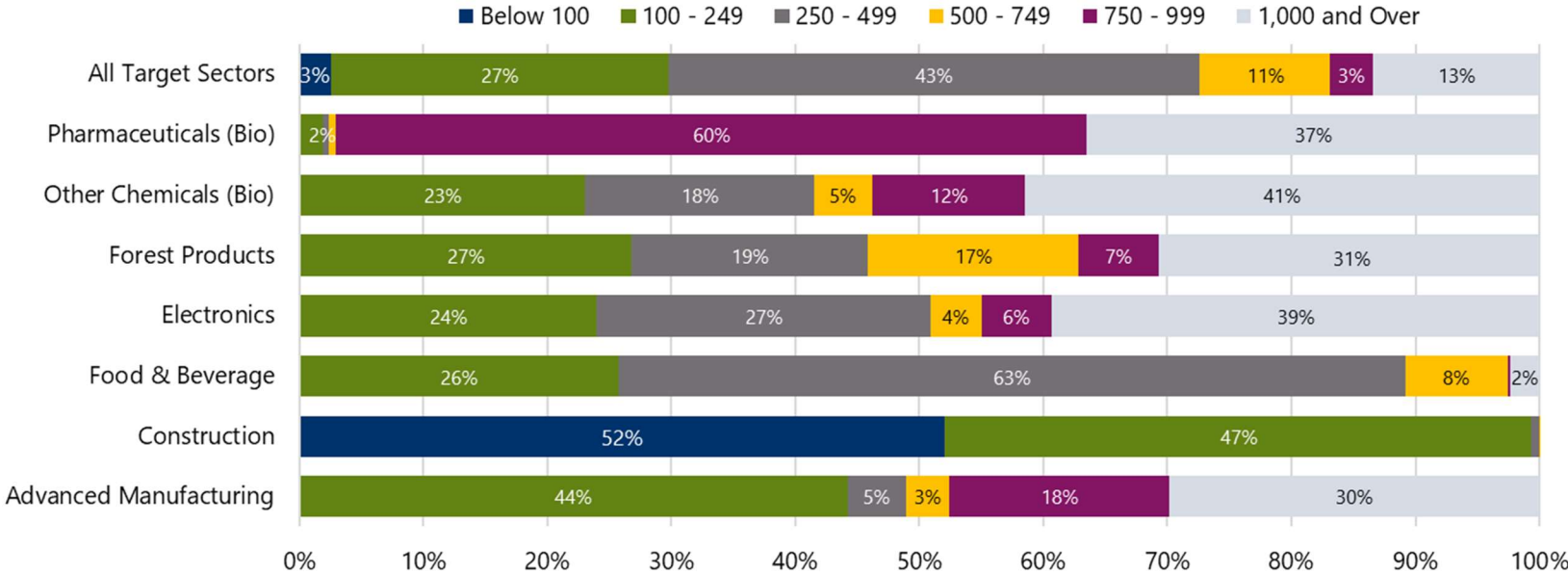
Legend: ■ Below 100 ■ 100 - 249 ■ 250 - 499 ■ 500 - 749 ■ 750 - 999 ■ 1,000 and Over

Sector	Below 100	100 - 249	250 - 499	500 - 749	750 - 999	1,000 and Over
All Target Sectors	3%	27%	43%	11%	3%	13%
Pharmaceuticals (Bio)		2%			60%	37%
Other Chemicals (Bio)		23%	18%	5%	12%	41%
Forest Products		27%	19%	17%	7%	31%
Electronics		24%	27%	4%	6%	39%
Food & Beverage		26%	63%	8%		2%
Construction	52%	47%				
Advanced Manufacturing		44%	5%	3%	18%	30%

Source: US Department of Transportation, Federal Highway Administration, Bureau of Transportation Statistics, Freight Analysis Framework 5

Top 3 Destination States for Domestic Freight of Maine

	Top States
Advanced Manufacturing	Massachusetts, Virginia, Tennessee
Food & Beverages	New York, New Jersey, Massachusetts
Construction	New Hampshire
Electronics	New York, Massachusetts, New Hampshire
Forest Products	Pennsylvania, Massachusetts, New Hampshire
Other Chemicals	Wisconsin, Massachusetts, New Jersey
Pharmaceuticals	North Carolina, Wisconsin, California
Overall	New York, Massachusetts, New Jersey

Source: US Department of Transportation, Federal Highway Administration, Bureau of Transportation Statistics, Freight Analysis Framework 5

New England and the Mid-Atlantic are generally where Maine ships the most of the targeted sectors' goods.

- By weight, Food Manufacturing goods are the products that are most-shipped out of Maine in 2022 (6.2 million tons), followed by Forest Products (3.7 million tons)

- By value, Forest Products is by far the group of goods that sees the most domestic exports from Maine, among the targeted sector groups. $4.1 billion of Forest Products were shipped in 2022.

- In total, $13.2 billion of goods in the targeted trade sectors were shipped domestically from Maine in 2022, with $5.2 billion going to other New England states, $2.8 billion going to the Middle Atlantic, $1.5 billion to East North Central, and $1.5 billion to the South Atlantic. The remaining $2.2 billion was shipped to other divisions throughout the U.S.

2022 Total Domestic Tons Shipped From Maine
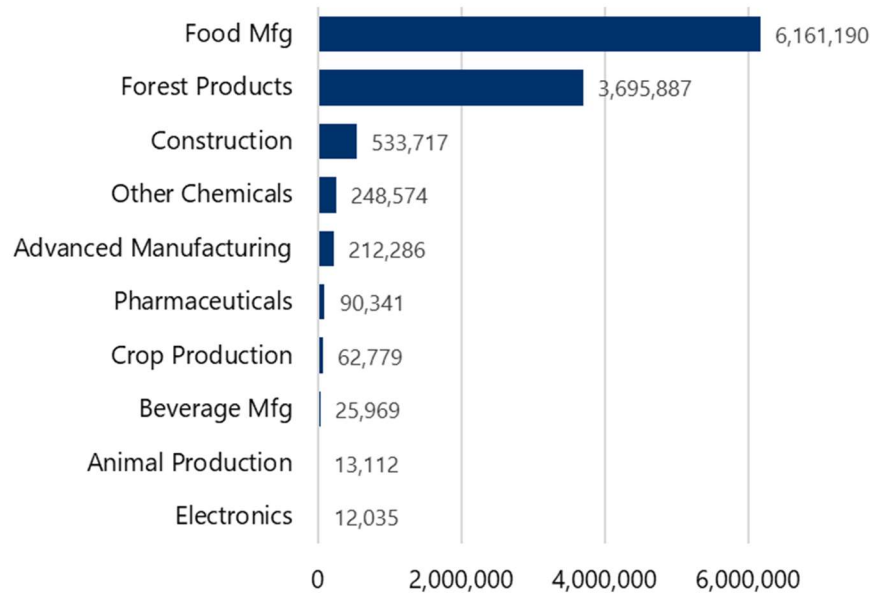
Sector	Tons
Food Mfg	6,161,190
Forest Products	3,695,887
Construction	533,717
Other Chemicals	248,574
Advanced Manufacturing	212,286
Pharmaceuticals	90,341
Crop Production	62,779
Beverage Mfg	25,969
Animal Production	13,112
Electronics	12,035

Source: US Department of Transportation, Federal Highway Administration, Bureau of Transportation Statistics, Freight Analysis Framework 5

2022 Total Value of Domestic Shipments From Maine
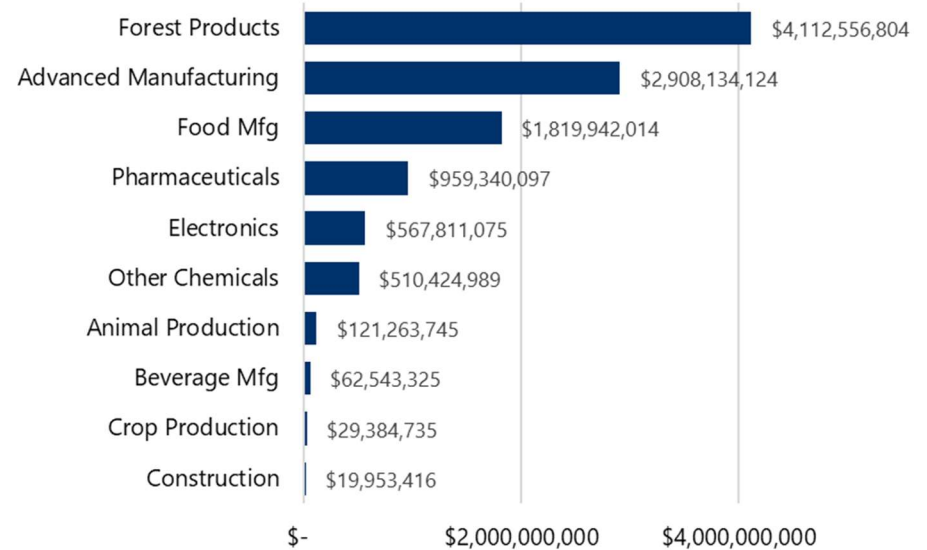
Sector	Value
Forest Products	$4,112,556,804
Advanced Manufacturing	$2,908,134,124
Food Mfg	$1,819,942,014
Pharmaceuticals	$959,340,097
Electronics	$567,811,075
Other Chemicals	$510,424,989
Animal Production	$121,263,745
Beverage Mfg	$62,543,325
Crop Production	$29,384,735
Construction	$19,953,416

Source: US Department of Transportation, Federal Highway Administration, Bureau of Transportation Statistics, Freight Analysis Framework 5

Regional Profiles

New England
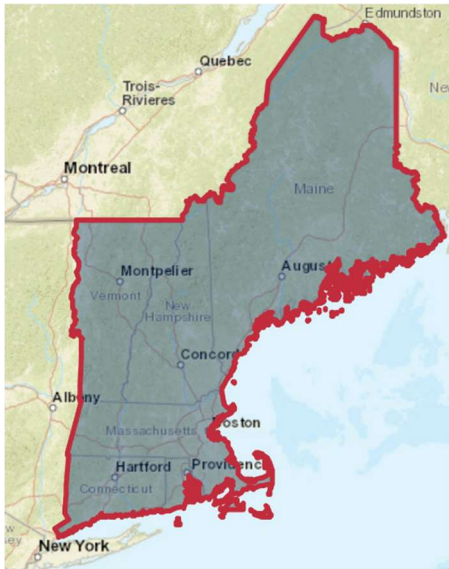
New England is made up of six states: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont.

- The target industries with the highest potential for success for Maine are: Advanced Manufacturing; Food and Beverage Manufacturing; Logistics, Transportation, and Warehousing; and Retail Trade.
- Based on the top target industries performance, *Vermont*, *New Hampshire*, *Connecticut*, and *Massachusetts* represent opportunity states for Maine to engage in more domestic trade activity with.
- Maine lies within New England, and therefore domestic trade is within close proximity. This allows Maine to trade products that typically travel only short distances. The primary method of distribution to New England is trucking.
- New England's population is over 15.2 million in 2023, representing 4.5% of the nation's total population.
- The division's population grew 4.6% between the last two Censuses but is projected to plateau in the next five years, with growth of only 0.5% from 2023-2028.
- Median household income in 2023 is $85,803, higher than the US median of $72,603.
- New England accounted for 5.3% of the nation's GRP in 2022, at $1.33 trillion.
- With total employment of 8.2 million jobs in 2022, the division's productivity was relatively high, with $161,579 of GRP per job.

New England Demographic Summary

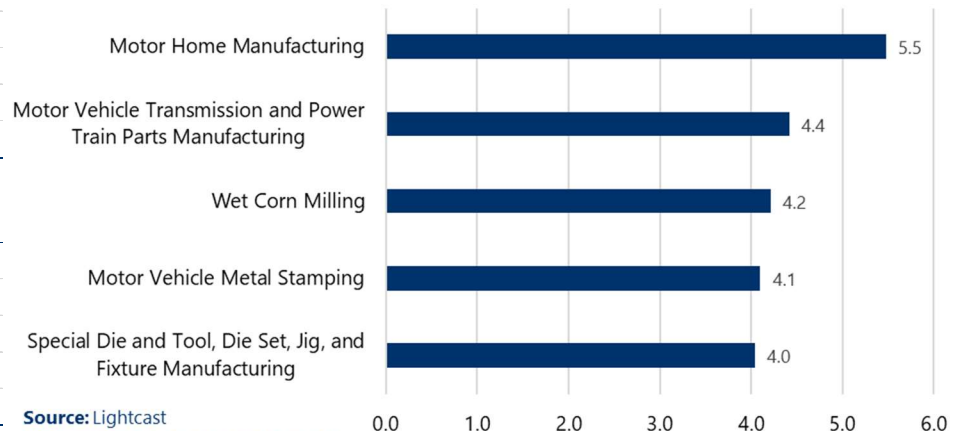|	
Population 2023	15,267,228
Share of U.S. Population	4.5%
Population Growth, 2010-2020	4.6%
Projected Population Growth, 2023-2028	0.5%
Median Household Income (2023)	$85,803

Source: Esri

New England Economy Summary (2022)

Total GRP	$1.33 Trillion
Share of U.S. GRP	5.3%
Average Earnings per Job	$91,864
Total Employment	8,218,716
Productivity (GRP per Job)	$161,579

Source: Lightcast

Top Industries by Employment Concentration (2022)
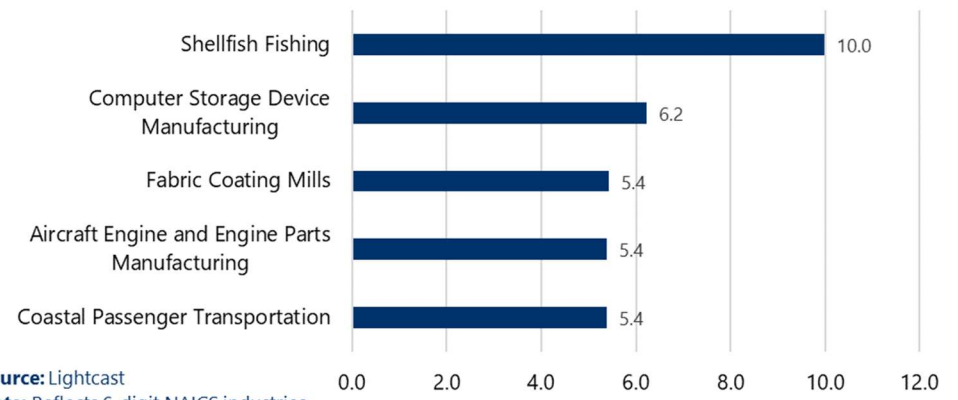
Source: Lightcast
Note: Reflects 6-digit NAICS industries

Mid-Atlantic
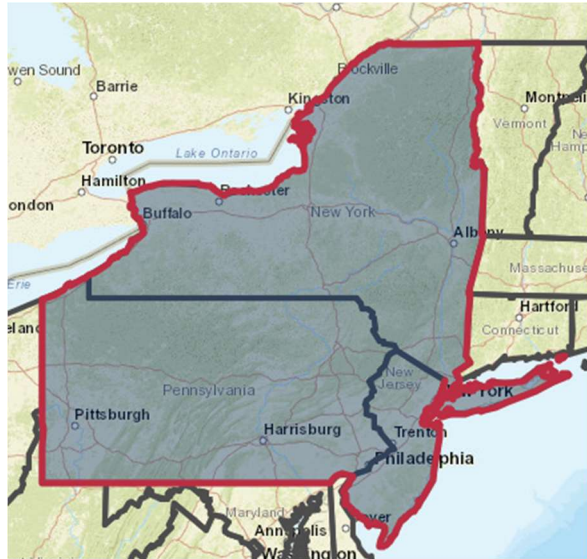
The Mid-Atlantic Division is made up of three states: New Jersey, New York, and Pennsylvania.

- The target industries with the highest potential for success for Maine are: Construction and Food and Beverage Manufacturing.
- Based on the target industries performance, *New York* and *New Jersey* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- The Mid-Atlantic is in relatively close proximity to Maine, which allows for significant trade volumes of Maine's products. About 35% of freight leaving Maine goes to the Mid-Atlantic division.
- The Mid-Atlantic's population is over 42.5 million in 2023, representing 12.6% of the nation's total population.
- The division's population grew 4.0% between the last two Censuses but is projected to decline slightly in the next five years, at -0.2% from 2023-2028.
- Median household income in 2023 is $78,334, higher than the US median of $72,603.
- The Mid-Atlantic states accounted for 14.8% of the nation's GRP in 2022, at $3.71 trillion.
- With total employment of 21.3 million jobs in 2022, the division's productivity was relatively high, with $174,078 of GRP per job.

Mid-Atlantic Demographic Summary

Population 2023	42,550,981
Share of U.S. Population	12.6%
Population Growth, 2010-2020	4.0%
Projected Population Growth, 2023-2028	-0.2%
Median Household Income (2023)	$78,334

Source: Esri

Mid-Atlantic Economy Summary (2022)

Total GRP	$3.71 Trillion
Share of U.S. GRP	14.8%
Average Earnings per Job	$93,672
Total Employment	21,299,657
Productivity (GRP per Job)	$174,078

Source: Lightcast

Top Industries by Employment Concentration (2022)

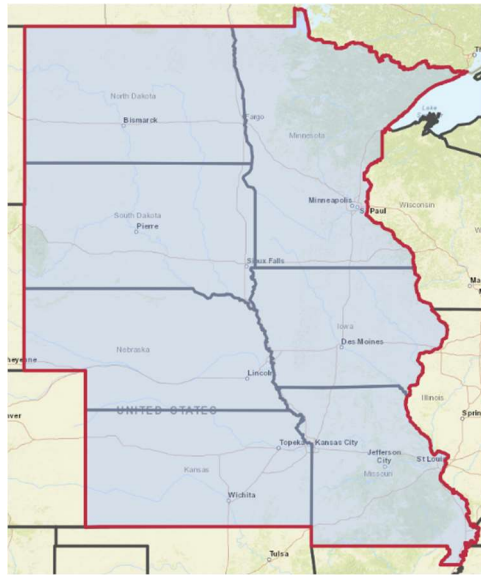| Industry	Value
Libraries and Archives	4.5
Powder Metallurgy Part Manufacturing	4.3
Media Buying Agencies	4.0
All Other Petroleum and Coal Products Manufacturing	3.2
School and Employee Bus Transportation	3.1
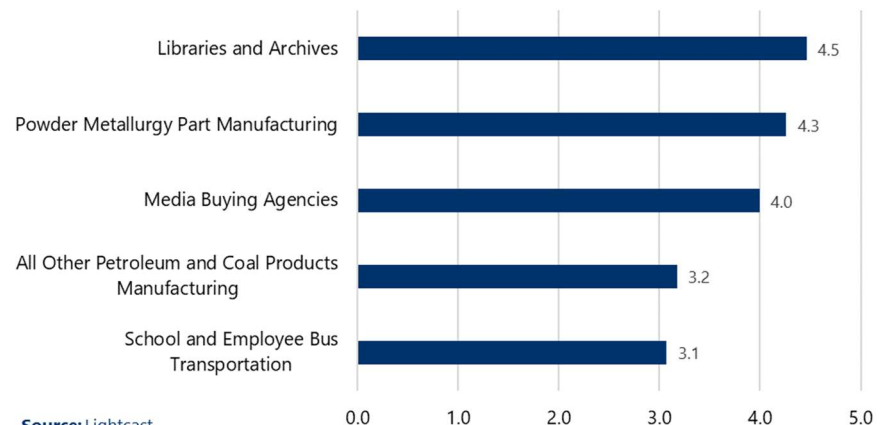
Source: Lightcast
Note: Reflects 6-digit NAICS industries

East North Central

The East North Central Division is made up of five states: Indiana, Illinois, Michigan, Ohio, and Wisconsin.

- The target industries with the highest potential for success for Maine are: Agriculture; Clean Energy; Construction; Seafood; Food and Beverage Wholesale; and Information Technology.
- Based on the target industries performance, *Indiana, Wisconsin,* and *Michigan* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- East North Central is located within medium distance from Maine, with freight traveling an average of 750-1,500 miles. While the primary freight mode for this division is trucking, rail and multi-modal freight are also key to delivering Maine's products to the area.
- The division's population grew 2.0% between the last two Censuses but is projected to decline slightly in the next five years, at -0.1% from 2023-2028.
- Median household income in 2023 is $67,561, lower than the US median of $72,603.
- With total employment of 23.8 million jobs in 2022, the division's productivity was $137,002 of GRP per job, lower than the national average of $148,231.

East North Central Demographic Summary

Population 2023	47,499,824
Share of U.S. Population	14.1%
Population Growth, 2010-2020	2.0%
Projected Population Growth, 2023-2028	-0.1%
Median Household Income (2023)	$67,561

Source: Esri

East North Central Economy Summary (2022)

Total GRP	$3.26 Trillion
Share of U.S. GRP	13.0%
Average Earnings per Job	$75,328
Total Employment	23,789,791
Productivity (GRP per Job)	$137,002

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Motor Home Manufacturing	5.5
Motor Vehicle Transmission and Power Train Parts Manufacturing	4.4
Wet Corn Milling	4.2
Motor Vehicle Metal Stamping	4.1
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	4.0

Source: Lightcast
Note: Reflects 6-digit NAICS industries

West North Central

The West North Central Division is made up of seven states: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota.

- The target industries with the highest potential for success for Maine are: Advanced Manufacturing; Aerospace; Agriculture; Biomedical Manufacturing; Clean Energy; Seafood; Food and Beverage Wholesale; Forestry and Forest Products; Information Technology; Logistics, Transportation, and Warehousing; and Retail Trade.
- Based on the target industries performance, *North Dakota*, *South Dakota*, *Nebraska*, and *Kansas* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- West North Central is fairly long-distance from Maine, with shipments traveling an average 1,000-2,000 miles. The most common mode of freight for goods heading to West North Central is trucks, though multi-modal freight also represents about a third of distribution.
- The division's population grew 5.4% between the last two Censuses and is projected to grow by 1.1% from 2023-2028.
- Median household income in 2023 is $69,575, lower than the US median of $72,603.
- The Mid-Atlantic states accounted for 6.3% of the nation's GRP in 2022, at $1.57 trillion.
- With total employment of 11.8 million jobs in 2022, the division's productivity was $132,625 of GRP per job, lower than the national average of $148,231.

West North Central Demographic Summary

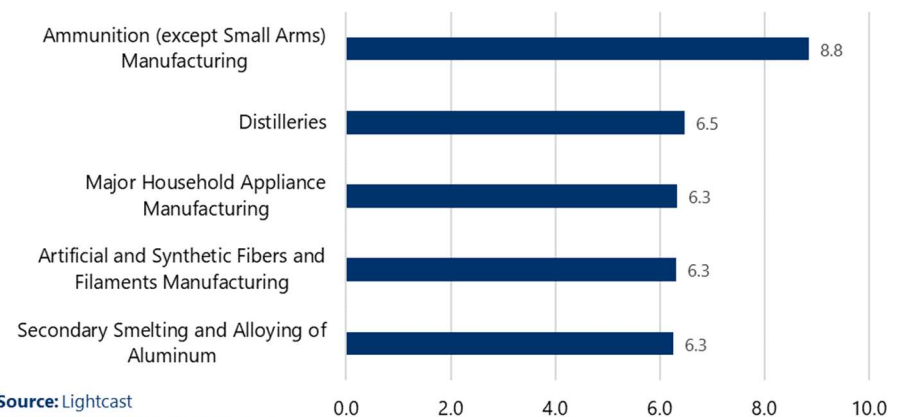|	
Population 2023	21,884,926
Share of U.S. Population	6.5%
Population Growth, 2010-2020	5.4%
Projected Population Growth, 2023-2028	1.1%
Median Household Income (2023)	$69,575

Source: Esri

West North Central Economy Summary (2022)

Total GRP	$1.57 Trillion
Share of U.S. GRP	6.3%
Average Earnings per Job	$71,327
Total Employment	11,825,846
Productivity (GRP per Job)	$132,625

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Iron Ore Mining	11.0
Grain and Field Bean Merchant Wholesalers	7.8
Ethyl Alcohol Manufacturing	7.7
Animal (except Poultry) Slaughtering	6.6
Farm Machinery and Equipment Manufacturing	6.5
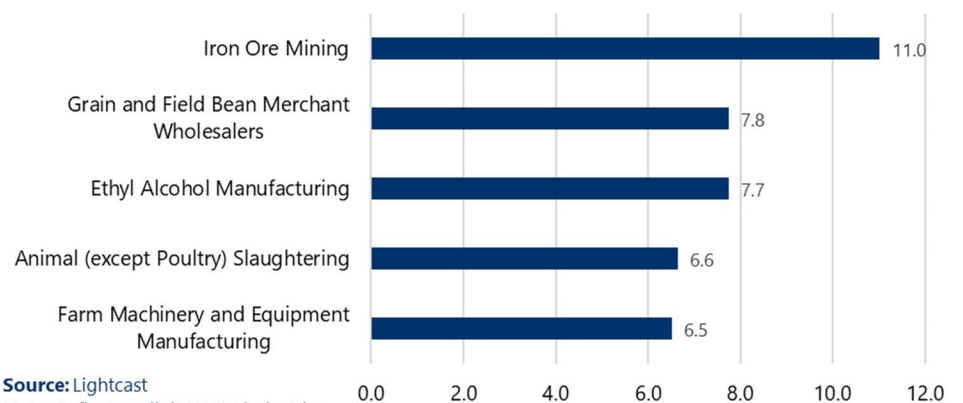
Source: Lightcast
Note: Reflects 6-digit NAICS industries

South Atlantic
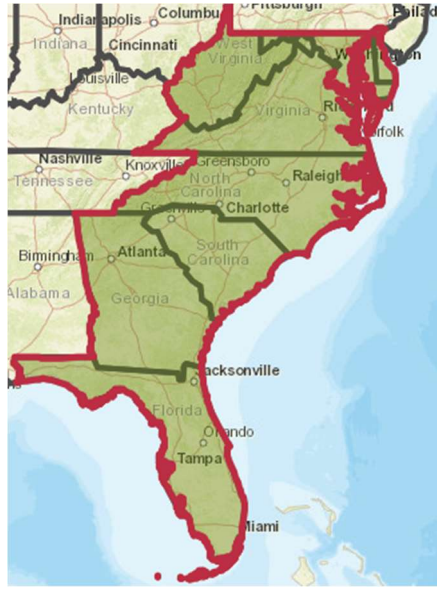
The South Atlantic Division is made up of nine geographies: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, and West Virginia.

- The target industry with the highest potential for success for Maine is Aerospace however, Biomedical Manufacturing, Food and Beverage Manufacturing, and Seafood are medium-priority opportunities.
- Based on the target industries performance, *Delaware, Virginia, Maryland*, and *West Virginia* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- The South Atlantic has the benefit of being on the East Coast with Maine, though located at a slightly longer distance, with shipments from Maine averaging 750-1,500 miles of travel. The division accounts for 5% of freight leaving Maine, with trucks being the most common method of transport.
- The South Atlantic's population represents one-fifth of the nation's total population.
- The division's population grew 10.6% between the last two Censuses and is projected to grow a further 2.5% from 2023-2028.
- Median household income in 2023 is $69,501, slightly lower than the US median of $72,603.
- The South Atlantic states accounted for 18.4% of the nation's GRP in 2022, at $4.60 trillion.
- With total employment of 33.2 million jobs in 2022, the division's productivity was $138,616 of GRP per job, lower than the national average of $148,231.

South Atlantic Demographic Summary

Population 2023	68,035,389
Share of U.S. Population	20.2%
Population Growth, 2010-2020	10.6%
Projected Population Growth, 2023-2028	2.5%
Median Household Income (2023)	$69,501

Source: Esri

South Atlantic Economy Summary (2022)

Total GRP	$4.60 Trillion
Share of U.S. GRP	18.4%
Average Earnings per Job	$76,824
Total Employment	33,222,373
Productivity (GRP per Job)	$138,616

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Carpet and Rug Mills	4.2
Deep Sea Passenger Transportation	4.1
Fiber, Yarn, and Thread Mills	4.1
Crushed and Broken Granite Mining and Quarrying	3.8
Broadwoven Fabric Mills	3.3
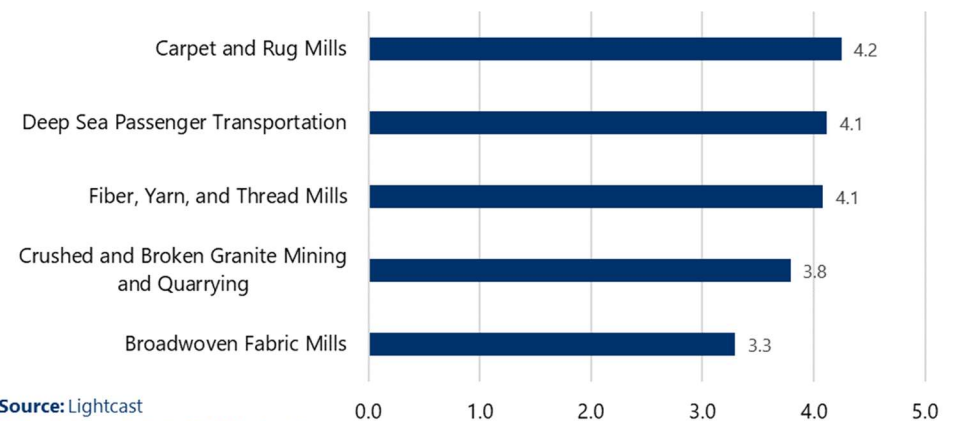
Source: Lightcast
Note: Reflects 6-digit NAICS industries

East South Central
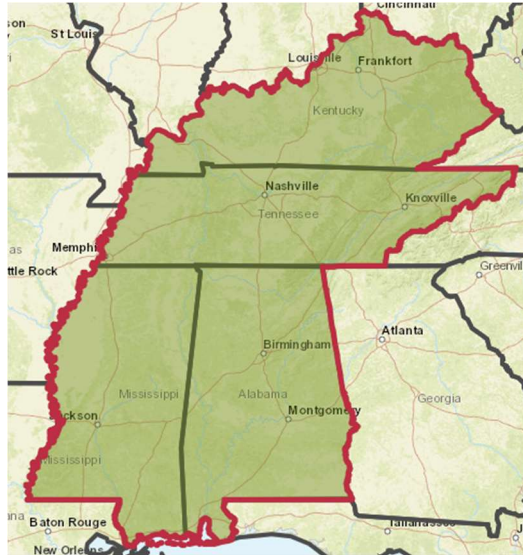
The East South Central Division is made up of four states: Alabama, Kentucky, Mississippi, and Tennessee.

- The target industries with the highest potential for success for Maine are: Advanced Manufacturing; Aerospace; Biomedical Manufacturing; Clean Energy; Construction; Seafood; Food and Beverage Manufacturing and Wholesale; Forestry and Forest Products; Information Technology; Logistics, Transportation, and Warehousing; and Retail Trade.
- Based on the target industries performance, *Kentucky* and *Mississippi* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- Freight leaving Maine for East South-Central travels an average 1,000-1,500 miles, with trucks accounting for approximately 95% of distribution to the division.
- East South Central's population is 19.7 million in 2023, representing 5.8% of the nation's total population.
- The division's population grew 5.3% between the last two Censuses and is projected to grow an additional 1.4% from 2023-2028.
- Median household income in 2023 is $57,327, much lower than the US median of $72,603.
- The East South Central states accounted for 4.6% of the nation's GRP in 2022, at $1.14 trillion.
- With total employment of 9.3 million jobs in 2022, the division's productivity was $122,353 of GRP per job, much lower than the national average of $148,231.

East South Central Demographic Summary

Population 2023	19,730,768
Share of U.S. Population	5.8%
Population Growth, 2010-2020	5.3%
Projected Population Growth, 2023-2028	1.4%
Median Household Income (2023)	$57,327

Source: Esri

East South Central Economy Summary (2022)

Total GRP	$1.14 Trillion
Share of U.S. GRP	4.6%
Average Earnings per Job	$66,922
Total Employment	9,353,487
Productivity (GRP per Job)	$122,353

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Ammunition (except Small Arms) Manufacturing	8.8
Distilleries	6.5
Major Household Appliance Manufacturing	6.3
Artificial and Synthetic Fibers and Filaments Manufacturing	6.3
Secondary Smelting and Alloying of Aluminum	6.3

Source: Lightcast
Note: Reflects 6-digit NAICS industries

West South Central

The West South Central Division is made up of four states: Arkansas, Louisiana, Oklahoma, and Texas.

- The West South Central region did not stand out with specific high priority area opportunities however, Biomedical Manufacturing and Information Technology are potential medium-priority opportunities.
- Based on the target industries performance, *Texas* and *Arkansas* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- The West South Central requires long-distance travel for goods leaving Maine, with an average shipment distance of over 2,000 miles. Trucks account for nearly all distribution to this division.
- West South Central's population is over 42.2 million in 2023, representing 12.5% of the nation's total population.
- The division's population grew 12.2% between the last two Censuses and is projected to grow a further 3.8% from 2023-2028.
- Median household income in 2023 is $64,449, lower than the US median of $72,603.
- The West South-Central states accounted for 11.8% of the nation's GRP in 2022, at $3.0 trillion.
- With total employment of 20.5 million jobs in 2022, the division's productivity was $144,587 of GRP per job, on par with the national average of $148,231.

West South Central Demographic Summary

Population 2023	42,257,835
Share of U.S. Population	12.5%
Population Growth, 2010-2020	12.2%
Projected Population Growth, 2023-2028	3.8%
Median Household Income (2023)	$64,449

Source: Esri

West South Central Economy Summary (2022)

Total GRP	$3.0 Trillion
Share of U.S. GRP	11.8%
Average Earnings per Job	$74,745
Total Employment	20,465,508
Productivity (GRP per Job)	$144,587

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Petrochemical Manufacturing	7.4
Oil and Gas Field Machinery and Equipment Manufacturing	7.3
All Other Pipeline Transportation	6.6
Crude Petroleum Extraction	6.2
Support Activities for Oil and Gas Operations	5.5
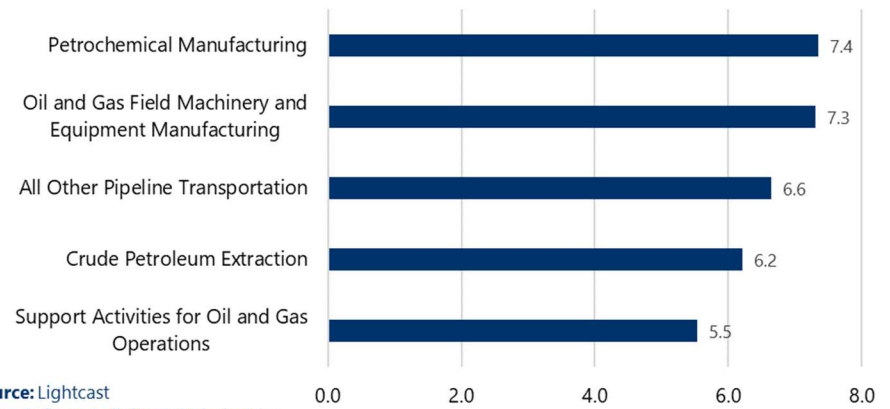
Source: Lightcast
Note: Reflects 6-digit NAICS industries

Mountain
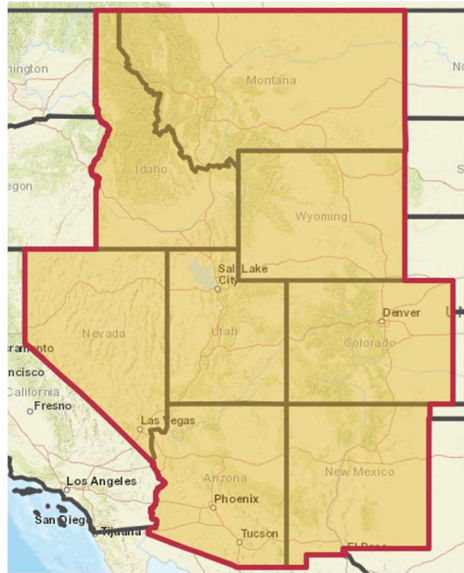
The Mountain Division is made up of eight states: Arizona, Colorado, Idaho, New Mexico, Montana, Utah, Nevada, and Wyoming.

- The target industries with the highest potential for success for Maine are: Biomedical Manufacturing and Forestry and Forest Products.
- Based on the target industries performance, *Idaho, Wyoming*, and *Nevada* represent the top opportunity states for Maine to engage in more domestic trade activity with in this region.
- The long-distance nature of this division may limit the types of goods suitable for expanding into the Mountain division markets. On average, shipments from Maine travel over 2,000 miles, primarily via both truck and rail.
- The Mountain Division's population is over 25.8 million in 2023, representing 7.7% of the nation's total population.
- The division's population grew 12.9% between the last two Censuses and is projected to grow an additional 3.2% from 2023-2028.
- Median household income in 2023 is $74,543, on par with the US median of $72,603.
- The Mountain states accounted for 6.9% of the nation's GRP in 2022, at $1.74 trillion.
- With total employment of 12.9 million jobs in 2022, the division's productivity was $134,191 of GRP per job, lower than the national average of $148,231.

Mountain Division Demographic Summary

Population 2023	25,869,903
Share of U.S. Population	7.7%
Population Growth, 2010-2020	12.9%
Projected Population Growth, 2023-2028	3.2%
Median Household Income (2023)	$74,543

Source: Esri

Mountain Division Economy Summary (2022)

Total GRP	$1.74 Trillion
Share of U.S. GRP	6.9%
Average Earnings per Job	$73,916
Total Employment	12,937,658
Productivity (GRP per Job)	$134,191

Source: Lightcast

Top Industries by Employment Concentration (2022)

Industry	Value
Support Activities for Metal Mining	10.5
Copper, Nickel, Lead, and Zinc Mining	10.3
Gold Ore and Silver Ore Mining	9.9
Other Metal Ore Mining	8.2
Casino Hotels	8.1
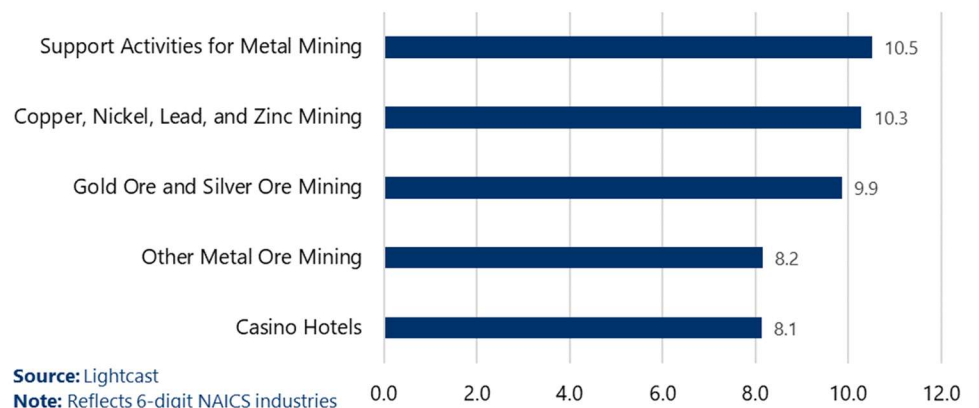
Source: Lightcast
Note: Reflects 6-digit NAICS industries

Pacific
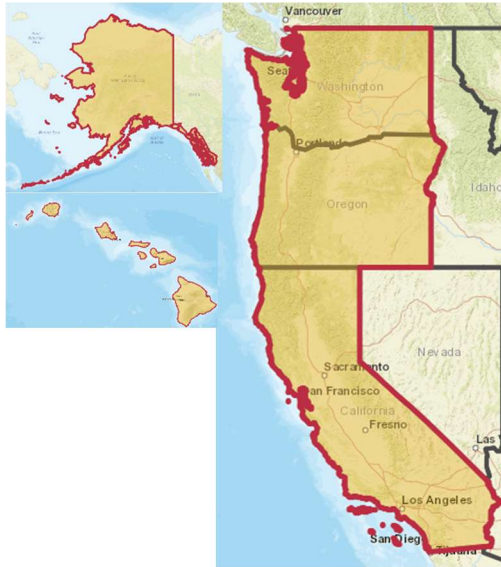
The Pacific Division is made up of five states: Alaska, California, Hawaii, Oregon, and Washington.

- The Pacific region did not stand out with specific high priority area opportunities however, Advanced Manufacturing products is a medium-priority opportunity.
- Based on the target industries performance, *Alaska, California,* and *Hawaii* represent the top opportunity states for Maine to engage in more domestic trade activity in this region.
- The Pacific Division is located the furthest distance from Maine, averaging over 2,000 miles, primarily by truck and rail. This may limit the goods that can be sold within these markets.
- The Pacific Division's population is over 54.3 million in 2023, representing 16.1% of the nation's total population.
- The division's population grew 7.6% between the last two Censuses and is projected to grow a further 1.1% from 2023-2028.
- Median household income in 2023 is $87,569, much higher than the US median of $72,603.
- The Pacific states accounted for 18.8% of the nation's GRP in 2022, at $4.71 trillion.
- With total employment of 27.7 million jobs in 2022, the division's productivity was relatively high, at $170,242 of GRP per job compared to the national average of $148,231.

Pacific Division Demographic Summary

Population 2023	54,373,331
Share of U.S. Population	16.1%
Population Growth, 2010-2020	7.6%
Projected Population Growth, 2023-2028	1.1%
Median Household Income (2023)	$87,569

Source: Esri

Pacific Division Economy Summary (2022)

Total GRP	$4.71 Trillion
Share of U.S. GRP	18.8%
Average Earnings per Job	$93,699
Total Employment	27,678,156
Productivity (GRP per Job)	$170,242

Source: Lightcast

Top Industries by Employment Concentration (2022)
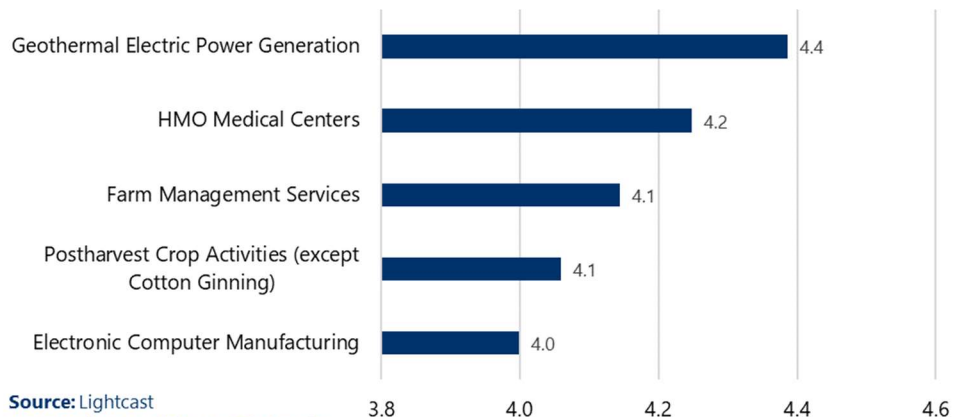
Source: Lightcast
Note: Reflects 6-digit NAICS industries

APPENDIX A: DATA TABLES AND MATRICES

Industry Performance by Region

In the following tables, the relative performance of thirteen target sectors is evaluated across three indicators: employment concentration, total domestic imports, domestic imports per capita, and average shipping distance.[4] Sector performance is also compared across the United States' nine Census districts, aiming to provide a geographic overview of the comparative performance of each of the target industries. The interpretation of the matrix is as follows:

- **A green-highlighted cell** indicates that for a given industry metric (employment concentration, domestic imports, or domestic imports per capita) the industry's performance is in the top third tier (first, second, or third most preferable value[5]) compared across the regions.

- **A blue-highlighted cell** indicates that for a given industry metric (employment concentration, domestic imports, or domestic imports per capita) the industry's performance is in the middle third tier (fourth, fifth, or sixth most preferable value) compared across the regions.

- **A gray-highlighted cell** indicates that for a given industry metric (employment concentration, domestic imports, or domestic imports per capita) the industry's performance is in the bottom third tier (seventh, eighth, or ninth most preferable value) compared across the regions.

Following the identification of all rankings, each industry is ultimately identified as being a high-priority opportunity, medium priority opportunity, or a low-priority opportunity for Maine to explore by region.

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[4] Average shipping distance displays the average distance in miles that goods travel from Maine to the indicated region. Note that while average shipping distance is presented, its significance varies depending on the specific industry and the nature of the goods being transported, making it a less critical factor in our decision-making process.

[5] For domestic imports and domestic imports per population, it is most preferable to have the highest value as that means that in that particular industry, the region imports more goods or services than the other regions. This is most preferable as it indicates that the region has a strong demand for goods in that industry, enabling Maine to take advantage of this strong demand and export Maine manufactured goods and services within the particular industry to that region. For employment concentration, the most preferable value is the lowest value, as that means in that particular industry the region does not have a strong employment base and as a result may be unable to satisfy demand for goods and services in the region with local production, increasing the need for the region to import goods to satisfy the in-region demand.

Industry Performance: Advanced Manufacturing, Aerospace, Agriculture, Biomedical Manufacturing, Clean Energy, Construction

Industry Performance by Region, By Key Indicators 2022

Region & Indicator	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
New England						
Employment Concentration	0.94	1.89	0.45	1.51	1.03	0.93
Domestic Imports	$62,704,627,988.40	$2,983,225,827.89	$8,817,666,986.76	$16,453,150,316.80	$5,684,263,278.58	$12,692,196,759.20
Domestic Imports/Population	$4,121.72	$196.09	$579.61	$1,081.50	$373.64	$834.29
Avg. Shipping Distance	100-250 miles					
Opportunity Potential Y/N	Y	N	N			
Mid-Atlantic						
Employment Concentration	0.66	0.45	0.44	1.16	0.87	0.82
Domestic Imports	$161,714,462,775.00	$11,919,824,476.50	$28,503,344,489.60	$38,949,859,485.10	$19,494,917,985.20	$62,441,250,434.00
Domestic Imports/Population	$3,808.26	$280.70	$671.23	$917.24	$459.09	$1,470.45
Avg. Shipping Distance	250-750 miles					
Opportunity Potential Y/N		N		N		Y
East North Central						
Employment Concentration	1.78	0.46	0.78	1.13	1.01	0.86
Domestic Imports	$123,072,821,747.00	$13,923,890,075.00	$46,397,384,874.60	$44,958,382,425.10	$22,154,031,676.50	$47,801,003,709.80
Domestic Imports/Population	$2,596.51	$293.76	$978.86	$948.50	$467.39	$1,008.47
Avg. Shipping Distance	750-1,500 miles					
Opportunity Potential Y/N	N		Y	N	Y	Y

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Industry Performance: Advanced Manufacturing, Aerospace, Agriculture, Biomedical Manufacturing, Clean Energy, Construction (Cont.)

Industry Performance by Region, By Key Indicators 2022 (Continued)

Region & Indicator	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
West North Central						
Employment Concentration	1.27	1.36	2.00	1.11	1.10	0.97
Domestic Imports	$97,249,865,430.50	$7,948,594,868.59	$41,158,004,048.60	$28,380,880,604.90	$10,751,114,054.00	$21,522,029,595.00
Domestic Imports/Population	$4,464.23	$364.88	$1,889.35	$1,302.82	$493.53	$987.96
Avg. Shipping Distance	1,000-1,500 miles					
Opportunity Potential Y/N	Y	Y	Y	Y	Y	
South Atlantic						
Employment Concentration	0.76	0.77	0.64	0.83	1.06	1.05
Domestic Imports	$232,785,403,142.00	$27,673,251,536.50	$36,217,999,075.80	$70,944,786,496.00	$20,420,167,293.30	$45,248,390,464.10
Domestic Imports/Population	$3,468.84	$412.37	$539.70	$1,057.18	$304.29	$674.27
Avg. Shipping Distance	1,000-1,500 miles					
Opportunity Potential Y/N		Y	N		N	N
East South Central						
Employment Concentration	1.46	0.62	0.86	0.67	1.10	0.95
Domestic Imports	$94,797,709,236.70	$7,681,062,120.10	$19,773,704,713.90	$27,807,761,696.20	$13,510,016,450.00	$26,712,510,428.80
Domestic Imports/Population	$4,825.40	$390.98	$1,006.52	$1,415.47	$687.69	$1,359.72
Avg. Shipping Distance	1,000-1,500 miles					
Opportunity Potential Y/N	Y	Y		Y	Y	Y

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Industry Performance: Advanced Manufacturing, Aerospace, Agriculture, Biomedical Manufacturing, Clean Energy, Construction (Cont.)

Industry Performance by Region, By Key Indicators 2022 (Continued)

Region & Indicator	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
West South Central						
Employment Concentration	1.01	0.96	0.78	0.65	1.12	1.17
Domestic Imports	$131,346,032,870.00	$11,689,659,113.60	$28,874,744,853.00	$47,354,581,139.40	$14,144,927,686.10	$22,728,535,327.10
Domestic Imports/Population	$3,160.62	$281.29	$694.82	$1,139.51	$340.37	$546.92
Avg. Shipping Distance	Over 2,000 miles					
Opportunity Potential Y/N	N	N			N	N
Mountain						
Employment Concentration	0.69	1.31	1.00	0.99	1.05	1.24
Domestic Imports	$101,208,942,374.00	$8,681,954,794.40	$16,106,015,646.30	$30,323,319,980.80	$9,302,628,846.04	$12,493,238,529.10
Domestic Imports/Population	$3,964.53	$340.09	$630.90	$1,187.82	$364.40	$489.38
Avg. Shipping Distance	Over 2,000 miles					
Opportunity Potential Y/N				Y		N
Pacific						
Employment Concentration	0.76	1.76	1.99	1.14	0.82	1.02
Domestic Imports	$172,955,631,038	$7,916,409,456	$17,021,354,327	$35,740,960,608	$18,104,140,865	$33,679,173,235
Domestic Imports/Population	$3,235	$148	$318	$669	$339	$630
Avg. Shipping Distance	Over 2,000 miles					
Opportunity Potential Y/N	N	N	N	N	N	

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Industry Performance: Fishing, Food & Bev Manufacturing, Food & Bev Wholesale, Forestry & Forest Products, IT, LTW, Retail

Industry Performance by Region, By Key Indicators 2022 (Continued)

Region & Indicator	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logistics, Transportation, Warehousing	Retail
New England							
Employment Concentration	6.43	0.70	0.98	0.83	1.14	0.64	0.99
Domestic Imports	$13,952,236.66	$32,065,682,487.90	$2,759,435,039.15	$10,066,602,414.40	$27,540,840,311	$30,087,505,308.20	$51,961,540,672.90
Domestic Imports/Population	$0.92	$2,107.75	$181.38	$661.70	$1,810.32	$1,977.72	$3,415.55
Avg. Shipping Distance				100-250 miles			
Opportunity Potential Y/N	N	Y			N	Y	Y
Mid-Atlantic							
Employment Concentration	0.23	0.80	1.07	0.80	0.95	1.02	0.95
Domestic Imports	$547,601,649.12	$74,036,843,513.80	$4,627,556,590.38	$25,838,782,811.70	$66,023,869,898	$45,395,635,924.40	$111,930,675,909.00
Domestic Imports/Population	$12.90	$1,743.51	$108.98	$608.48	$1,554.81	$1,069.03	$2,635.88
Avg. Shipping Distance				250-750 miles			
Opportunity Potential Y/N		Y	N		N		
East North Central							
Employment Concentration	0.06	1.24	1.02	1.28	0.77	1.11	0.99
Domestic Imports	$651,318,388.39	$56,428,262,330.10	$10,625,479,560.80	$29,227,268,281.70	$131,719,538,392	$43,657,539,536.60	$108,418,712,521.00
Domestic Imports/Population	$13.74	$1,190.48	$224.17	$616.62	$2,778.93	$921.06	$2,287.34
Avg. Shipping Distance				750-1,500 miles			
Opportunity Potential Y/N	Y	N	Y		Y		

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Industry Performance: Fishing, Food & Bev Manufacturing, Food & Bev Wholesale, Forestry & Forest Products, IT, LTW, Retail (Cont.)

Industry Performance by Region, By Key Indicators 2022 (Continued)

Region & Indicator	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logistics, Transportation, Warehousing	Retail
West North Central							
Employment Concentration	0.20	1.84	0.85	1.14	0.78	0.97	1.01
Domestic Imports	$381,918,898.87	$33,930,450,568.30	$9,501,752,222.58	$18,902,258,687.60	$71,610,214,303	$35,173,270,972.00	$62,571,324,890.00
Domestic Imports/Population	$17.53	$1,557.57	$436.18	$867.70	$3,287.25	$1,614.62	$2,872.32
Avg. Shipping Distance				1,000-1,500 miles			
Opportunity Potential Y/N	Y		Y	Y	Y	Y	Y
South Atlantic							
Employment Concentration	1.06	0.74	0.94	0.99	1.07	0.97	1.05
Domestic Imports	$662,807,601.76	$96,724,537,869.70	$8,000,083,120.16	$28,658,651,985.00	$141,356,901,884	$48,774,800,716.40	$120,542,102,485.00
Domestic Imports/Population	$9.88	$1,441.34	$119.21	$427.06	$2,106.42	$726.82	$1,796.25
Avg. Shipping Distance				1,000-1,500 miles			
Opportunity Potential Y/N			N	N		N	N
East South Central							
Employment Concentration	0.52	1.30	0.92	1.78	0.59	1.19	1.07
Domestic Imports	$274,132,645.18	$31,449,218,124.40	$6,186,709,573.65	$14,166,487,446.70	$70,756,970,745	$29,725,297,036.90	$54,385,802,184.80
Domestic Imports/Population	$13.95	$1,600.83	$314.92	$721.10	$3,601.68	$1,513.08	$2,768.35
Avg. Shipping Distance				1,000-1,500 miles			
Opportunity Potential Y/N	Y	Y	Y	Y	Y	Y	Y

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Industry Performance: Fishing, Food & Bev Manufacturing, Food & Bev Wholesale, Forestry & Forest Products, IT, LTW, Retail (Cont.)

Industry Performance by Region, By Key Indicators 2022 (Continued)

Region & Indicator	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logistics, Transportation, Warehousing	Retail
West South Central							
Employment Concentration	0.99	0.93	1.01	0.89	0.97	1.09	1.03
Domestic Imports	$274,833,159.43	$56,803,796,767.00	$5,882,013,335.91	$21,357,399,318.80	$90,110,103,568	$31,841,162,859.70	$80,344,846,299.50
Domestic Imports/Population	$6.61	$1,366.89	$141.54	$513.93	$2,168.35	$766.20	$1,933.37
Avg. Shipping Distance				Over 2,000 miles			
Opportunity Potential Y/N	N	N		N		N	N
Mountain							
Employment Concentration	0.16	0.82	0.94	0.72	1.05	0.93	1.04
Domestic Imports	$348,128,560.47	$40,474,538,837.90	$4,497,142,074.72	$17,301,842,963.30	$60,027,390,823	$28,339,056,321.80	$57,569,602,023.50
Domestic Imports/Population	$13.64	$1,585.46	$176.16	$677.74	$2,351.38	$1,110.09	$2,255.10
Avg. Shipping Distance				Over 2,000 miles			
Opportunity Potential Y/N				Y			
Pacific							
Employment Concentration	1.62	1.03	1.12	0.86	1.33	0.95	0.91
Domestic Imports	$282,707,881.37	$65,659,464,414.30	$4,772,802,903.49	$23,932,299,342.60	$35,624,987,935	$45,908,208,850.30	$90,168,137,108.20
Domestic Imports/Population	$5.29	$1,228.16	$89.28	$447.65	$666.36	$858.71	$1,686.59
Avg. Shipping Distance				Over 2,000 miles			
Opportunity Potential Y/N	N	N	N	N	N	N	N

Source: Lightcast, US Department of Transportation FAF 5

Note: Opportunity assessment is based on insights about regional strengths, import volume, freight accessibility, and current domestic trade patterns

Legend	
Top Third Opportunity Tier	
Middle Third Opportunity Tier	
Bottom Third Opportunity Tier	

Top Ten States in Domestic Imports Per Capita by Industry, 2022

Industries:	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
1	Kentucky	North Dakota	Hawaii	North Dakota	North Dakota	Wyoming
2	Alaska	South Dakota	Alaska	New Hampshire	Wyoming	Alaska
3	Indiana	Iowa	Virginia	Alaska	Mississippi	New York
4	North Dakota	Nebraska	North Dakota	South Dakota	Kentucky	West Virginia
5	Hawaii	Kansas	North Carolina	Wyoming	Indiana	Mississippi
6	Wyoming	Montana	Kansas	Virginia	South Dakota	Vermont
7	Mississippi	Idaho	Wyoming	Vermont	Alaska	North Dakota
8	Missouri	Arkansas	Washington	Connecticut	West Virginia	New Mexico
9	South Dakota	Wyoming	South Dakota	Maryland	Iowa	Kentucky
10	Virginia	Minnesota	New Mexico	Montana	Michigan	Kansas

Source: Lightcast

Region
New England
Mid-Atlantic
East North Central
West North Central
South Atlantic
East South Central
West South Central
Mountain
Pacific

Top Ten States in Domestic Imports Per Capita by Industry, 2022

Industries:	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logisitics, Warehousing, Transportation	Retail
1	Alaska	South Dakota	Iowa	Iowa	Alaska	Wyoming	Wyoming
2	Nebraska	Nebraska	South Dakota	North Dakota	North Dakota	South Dakota	Connecticut
3	Iowa	Iowa	Nebraska	South Dakota	Wyoming	North Dakota	New Hampshire
4	Nevada	North Dakota	Wisconsin	Nebraska	Hawaii	New Hampshire	Massachusetts
5	Idaho	New Hampshire	Kansas	Indiana	South Dakota	Nebraska	North Dakota
6	Mississippi	Kansas	North Dakota	Wyoming	Delaware	Iowa	Vermont
7	Kansas	Wyoming	Vermont	Kentucky	New Mexico	Delaware	Maryland
8	South Dakota	Connecticut	Wyoming	Kansas	Louisiana	Vermont	New Jersey
9	Arkansas	Massachusetts	Indiana	Vermont	Montana	Alaska	Rhode Island
10	Delaware	New York	Idaho	Idaho	Oklahoma	Louisiana	Delaware

Source: Lightcast

Top Ten States in Domestic Imports by Industry, 2022

Industries:	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
1	California	Virginia	Texas	California	Texas	California
2	Texas	Texas	Illinois	New York	New York	New York
3	New York	North Carolina	Iowa	Texas	California	Texas
4	Florida	New York	California	Florida	Florida	Ohio
5	Pennsylvania	Florida	Wisconsin	Illinois	Pennsylvania	Pennsylvania
6	Ohio	Georgia	New York	Pennsylvania	Virginia	Illinois
7	Indiana	Washington	Ohio	Georgia	Ohio	Michigan
8	Virginia	California	Nebraska	Ohio	Illinois	Florida
9	Illinois	Illinois	Georgia	North Carolina	Georgia	Indiana
10	North Carolina	Ohio	Pennsylvania	Michigan	Michigan	Virginia

Source: Lightcast

Region
New England
Mid-Atlantic
East North Central
West North Central
South Atlantic
East South Central
West South Central
Mountain
Pacific

Top Ten States in Domestic Imports by Industry, 2022

Industries:	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logistics, Transportation, Warehousing	Retail
1	Idaho	South Dakota	Pennsylvania	California	Texas	New York	California
2	Wyoming	Nebraska	Ohio	Texas	Florida	California	New York
3	Montana	Iowa	California	New York	New York	Texas	Texas
4	Utah	North Dakota	Texas	Florida	Pennsylvania	Pennsylvania	Pennsylvania
5	Louisiana	New Hampshire	Wisconsin	Illinois	Ohio	Ohio	New Jersey
6	Florida	Kansas	Virginia	Ohio	Michigan	Massachusetts	Illinois
7	Nevada	Wyoming	New York	Pennsylvania	California	Virginia	Florida
8	Colorado	Connecticut	Michigan	Michigan	Virginia	Illinois	Ohio
9	Texas	Massachusetts	Indiana	Indiana	Illinois	North Carolina	Virginia
10	Washington	New York	North Carolina	New Jersey	New Jersey	Michigan	Massachusetts

Source: Lightcast

Top Ten States in Employment Concentration by Industry, 2022

Industries:	Advanced Manufacturing	Aerospace	Agriculture	Biomedical Manufacturing	Clean Energy	Construction
1	Indiana	Washington	North Dakota	Minnesota	Nevada	Idaho
2	Michigan	Kansas	South Dakota	Utah	North Carolina	Wyoming
3	Wisconsin	Connecticut	Nebraska	Indiana	New Hampshire	Montana
4	Ohio	New Hampshire	Idaho	New Jersey	Indiana	Utah
5	Kentucky	Arizona	Montana	Massachusetts	Missouri	Louisiana
6	Connecticut	Oklahoma	Iowa	New Hampshire	South Carolina	Florida
7	Kansas	Alabama	Oregon	California	Oklahoma	Nevada
8	Alabama	Utah	Washington	Connecticut	Wisconsin	Colorado
9	Iowa	Missouri	Kansas	North Carolina	Iowa	Texas
10	Tennessee	California	California	Rhode Island	Arkansas	Washington

Source: Lightcast

Region

Region
New England
Mid-Atlantic
East North Central
West North Central
South Atlantic
East South Central
West South Central
Mountain
Pacific

Top Ten States in Employment Concentration by Industry, 2022

Industries:	Fishing	Food and Beverage Manufacturing	Food and Beverage Wholesale	Forestry & Forest Products	Information Technology	Logisitics, Transportation, Warehousing	Retail
1	Alaska	Arkansas	Hawaii	Oregon	Washington	Nevada	New Hampshire
2	Maine	Iowa	New Jersey	Alabama	Virginia	New Jersey	Maine
3	Rhode Island	Nebraska	Illinois	Maine	Colorado	Alaska	Montana
4	Louisiana	Wisconsin	Idaho	Wisconsin	Massachusetts	Georgia	Florida
5	Massachusetts	Alaska	Vermont	Arkansas	Utah	Illinois	Mississippi
6	Washington	Kansas	Florida	Idaho	California	Tennessee	West Virginia
7	Oregon	Idaho	Washington	Mississippi	Maryland	Kentucky	South Carolina
8	Mississippi	South Dakota	Oregon	Indiana	New Hampshire	Arkansas	Louisiana
9	New Hampshire	Mississippi	Maine	Vermont	Georgia	Indiana	Alabama
10	Florida	Vermont	Wisconsin	Kentucky	Texas	Nebraska	South Dakota

Source: Lightcast

APPENDIX B: INDUSTRY PERFORMANCE

Key Findings

When evaluating the employment concentrations across industries throughout the nation, Maine places in the top 10 for four of the target industries in terms of employment concentration. Maine has:

- The second highest employment concentration in **Fishing** Industries (with an employment concentration of 43.00)

- The second highest employment concentration in **Retail Trade** Industries (with an employment concentration of 1.22)

- The third highest employment concentration in **Forestry and Forest Products** Industries (with an employment concentration of 2.40)

- The ninth highest employment concentration in **Food and Beverage Wholesale** Industries (with an employment concentration of 1.15)

These industries may further inform where Maine should look to expand their domestic trade activity as there is an opportunity to specialize in these industries and export more goods domestically.

Having identified the industries in which Maine has a strong employment concentration, it is important to then understand which states import goods in these industries the most. Below are the top three states in terms of total domestic imports and domestic imports per population for Food and Beverage Wholesale, Forestry and Forest Products, Retail Trade, and Fishing.

- **California, New York, and Texas** had the most total domestic imports while **Alaska, Nebraska, and Iowa** had the most domestic imports per population for the **Fishing** industry in 2022.

- **California, New York, and Texas** had the most total domestic imports while **Wyoming, Connecticut, and New Hampshire** had the most domestic imports per population for the **Retail Trade** industry in 2022.

- **California, Texas, and New York** had the most total domestic imports while **Iowa, North Dakota, and South Dakota** had the most domestic imports per population for **Forestry and Forest Products Industries** in 2022.

- **Pennsylvania, Ohio, and California** had the most total domestic imports while **Iowa, South Dakota, and Nebraska** had the most domestic imports per population for **Food and Beverage Wholesale** industries in 2022.

Based on the industry performance in terms on concentration and import activity, the top opportunity states for Maine to engage in further domestic trade activity are identified below, with the top opportunity states in region and across the nation identified.
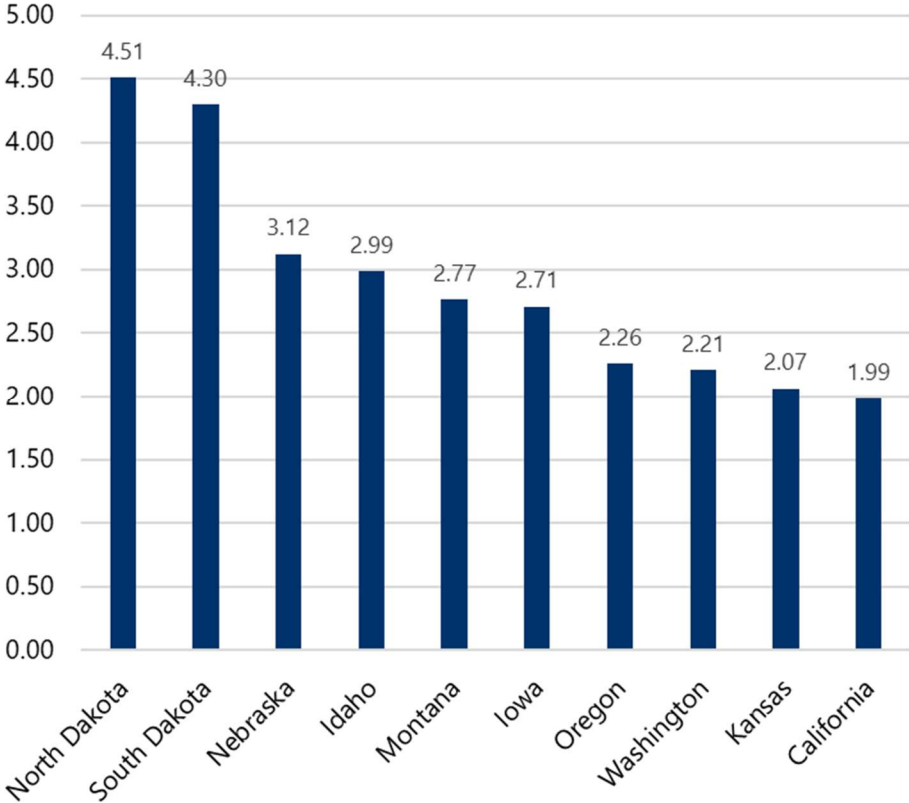
Advanced Manufacturing

Employment Concentration

Ten states had an employment concentration greater than 1.38, meaning they were at least 38% more concentrated than the national average in Advanced Manufacturing Industries. Indiana, Michigan, and Wisconsin had the largest the largest employment concentration in Advanced Manufacturing industries in 2022. Maine was not among the top ten states in terms of employment concentration in Advanced Manufacturing industries.

Advanced Manufacturing Employment Concentration, 2022

Employment Concentration

1.39   2.26

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Advanced Manufacturing Employment Concentration, 2022

State	Value
Indiana	2.26
Michigan	2.22
Wisconsin	1.80
Ohio	1.73
Kentucky	1.62
Connecticut	1.53
Kansas	1.52
Alabama	1.48
Iowa	1.46
Tennessee	1.39
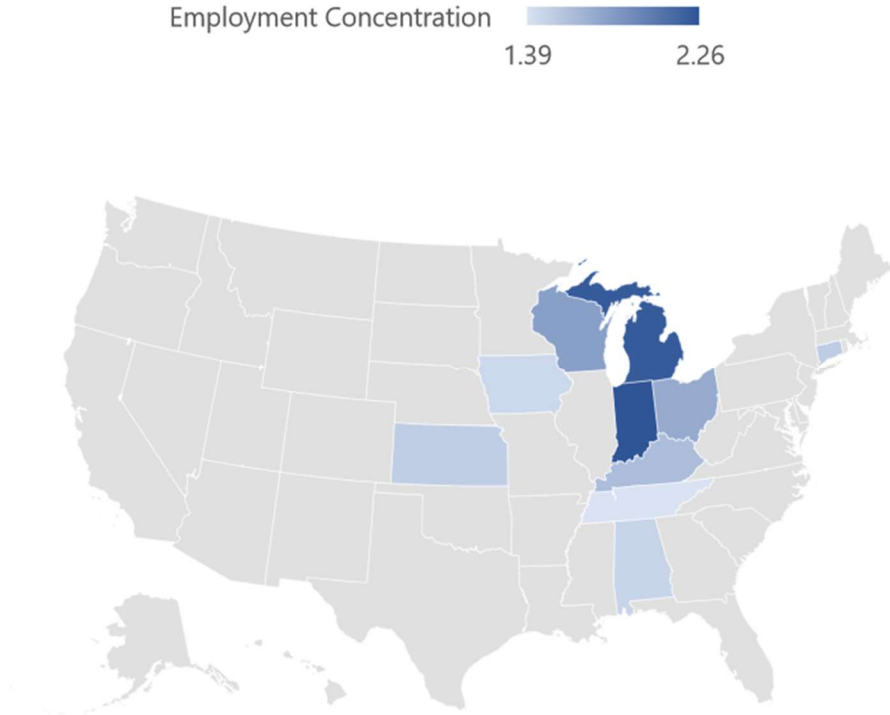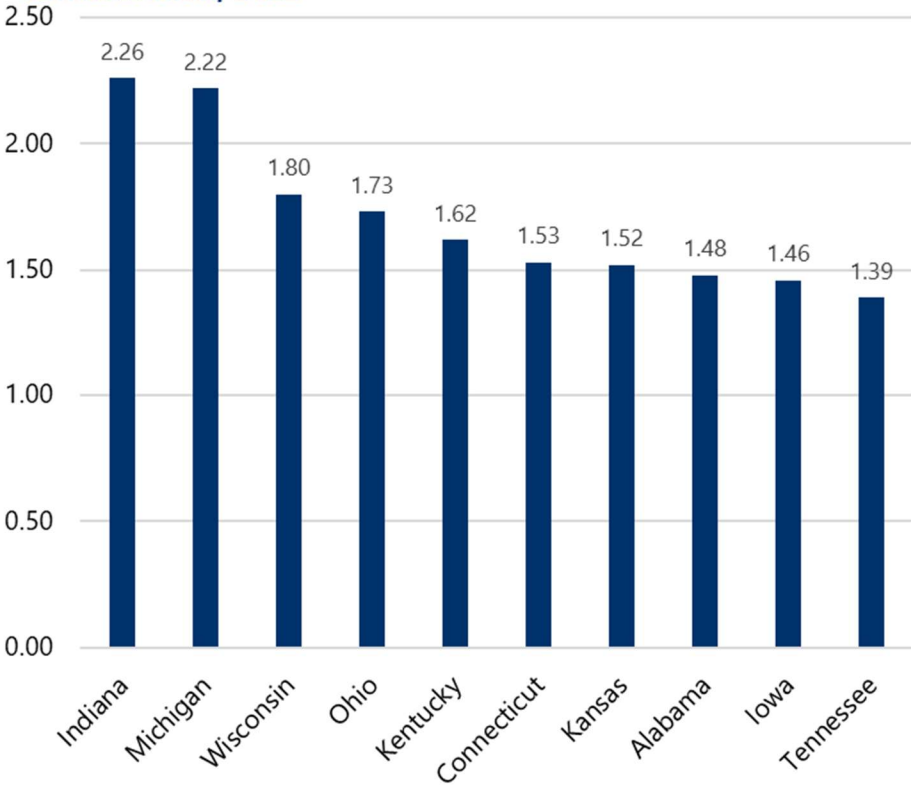
Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Advanced Manufacturing industries greater than $49 billion. California, Texas, and New York had the most domestic imports for Advanced Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports for Advanced Manufacturing industries.

Advanced Manufacturing Domestic Imports, 2022

Domestic Imports

$132,218,505,607
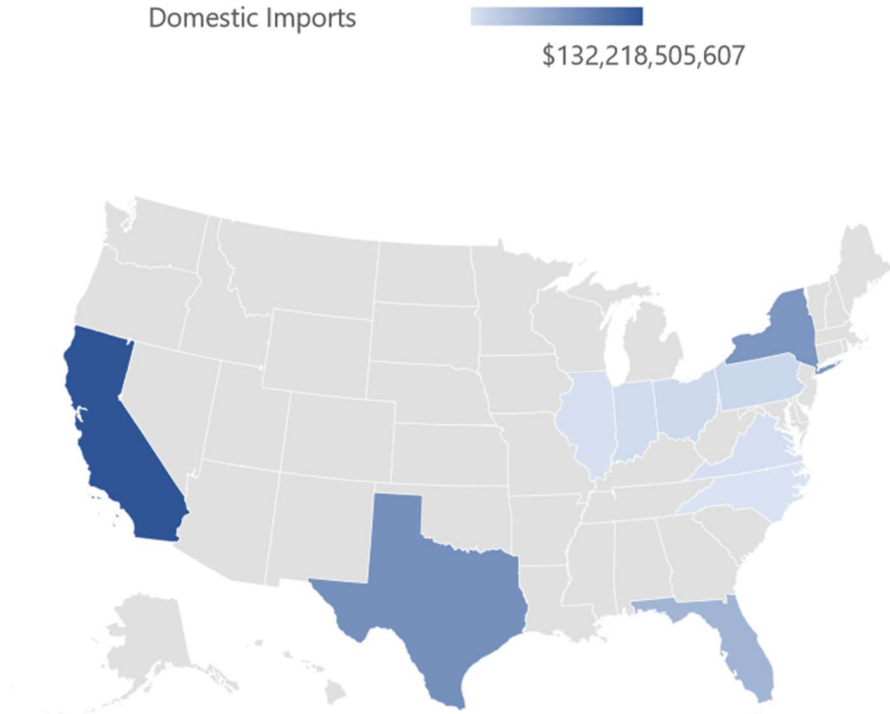
Powered by Bing
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Advanced Manufacturing Domestic Imports, 2022
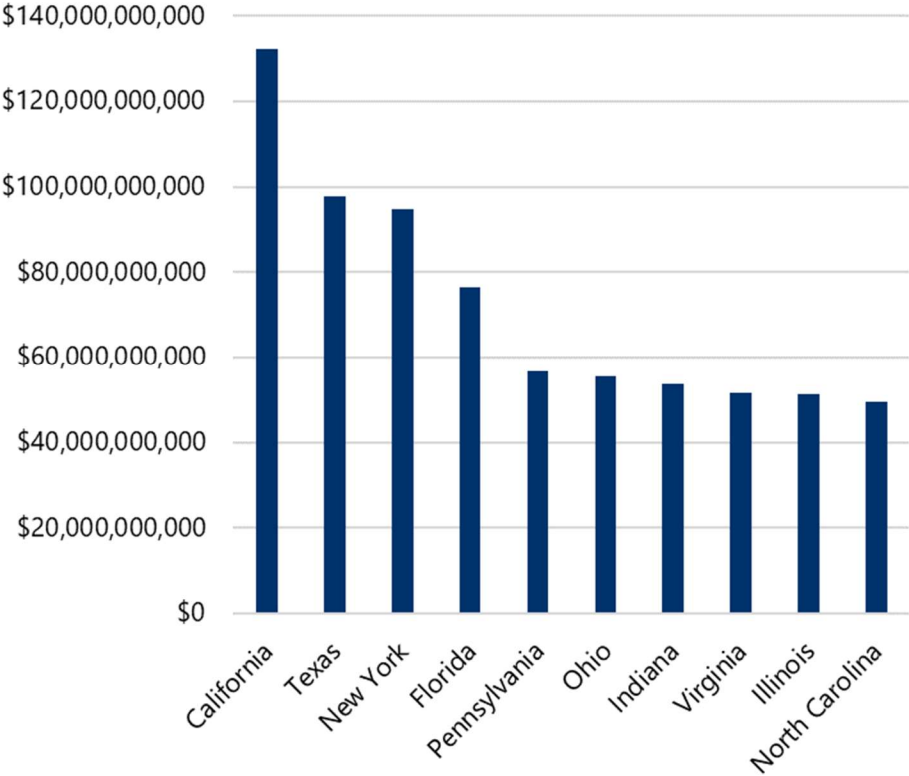
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $6,000 of Advanced Manufacturing goods and services per person annually. Kentucky, Alaska, and Indiana had the most domestic imports per person for Advanced Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Advanced Manufacturing Industries.

Advanced Manufacturing Domestic Imports Per Population, 2022

Domestic Imports/Population
$5,924 $8,234

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Advanced Manufacturing Domestic Imports Per Population, 2022

State	Value
Kentucky	$8,234
Alaska	$8,077
Indiana	$7,833
North Dakota	$7,418
Hawaii	$6,980
Wyoming	$6,769
Mississippi	$6,597
Missouri	$6,573
South Dakota	$6,104
Virginia	$5,924
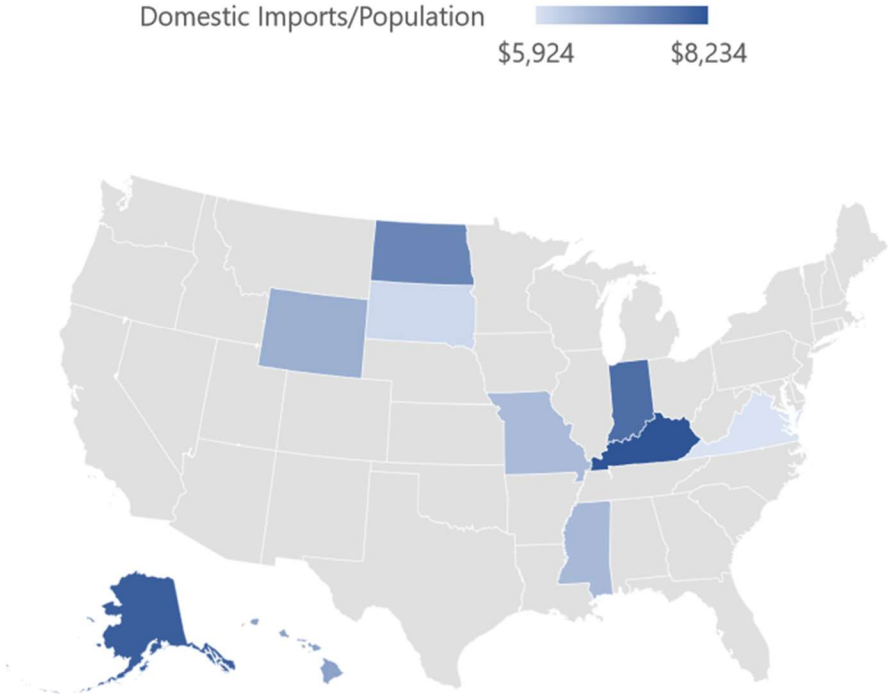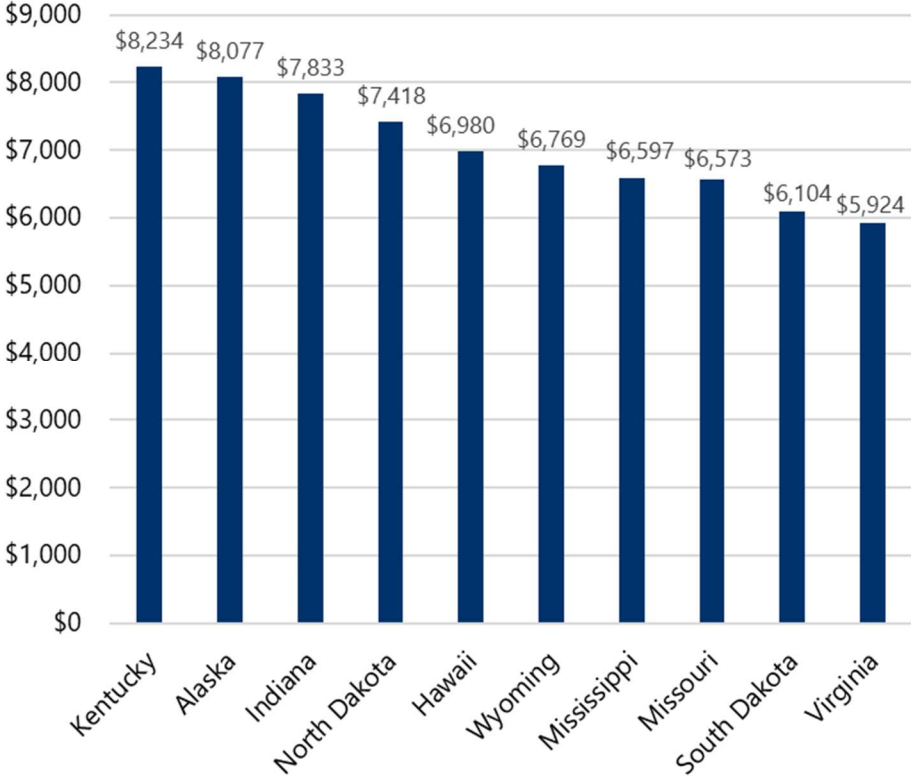
Source: Lightcast

Aerospace

Employment Concentration

Ten states had an employment concentration greater than 1.38, meaning they were at least 38% more concentrated than the national average in Aerospace industries. Washington, Kansas, and Connecticut had the largest the largest employment concentration in Aerospace industries in 2022. Maine was not among the top ten states in terms of employment concentration in Aerospace Industries.

Aerospace Employment Concentration, 2022

Employment Concentration
1.39   4.82
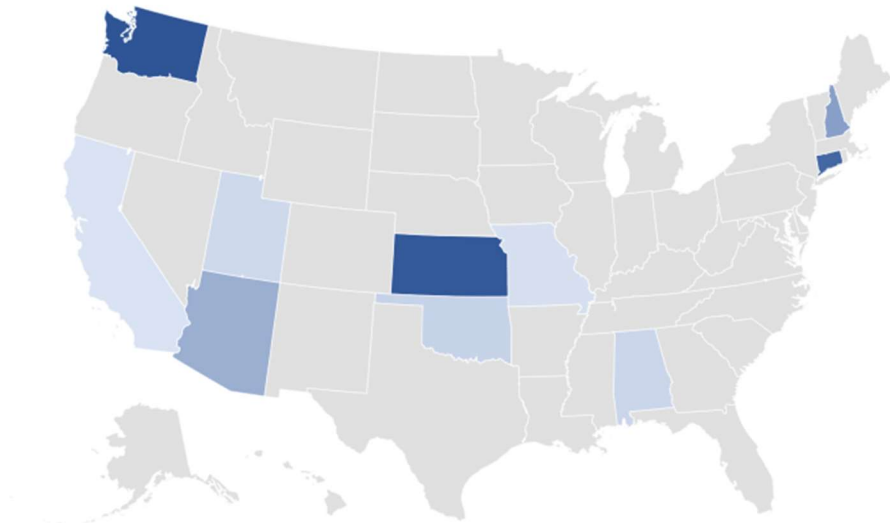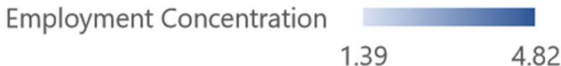
Powered by Bing
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Aerospace Employment Concentration, 2022
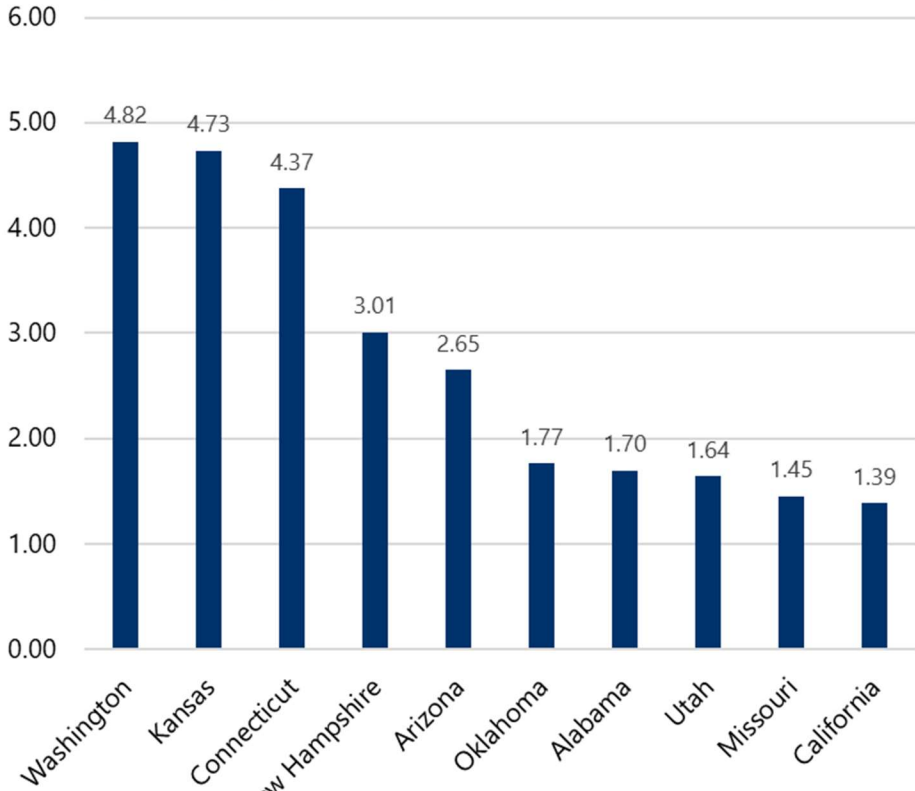
State	Value
Washington	4.82
Kansas	4.73
Connecticut	4.37
New Hampshire	3.01
Arizona	2.65
Oklahoma	1.77
Alabama	1.70
Utah	1.64
Missouri	1.45
California	1.39

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Aerospace Industries greater than $3.9 billion. Virginia, Texas, and North Carolina had the most domestic imports for Aerospace industries in 2022. Maine was not among the top ten states in terms of domestic imports Aerospace industries in 2022.

Aerospace Domestic Imports, 2022

Domestic Imports

$9,050,282,838
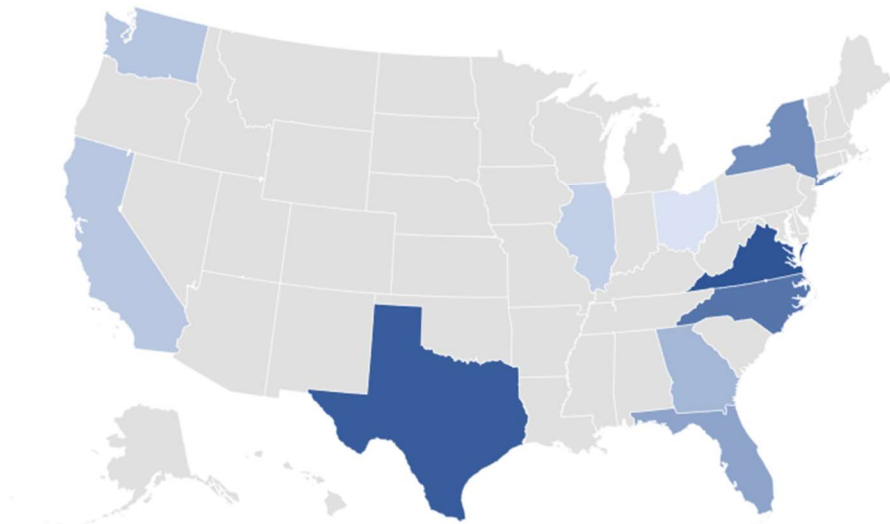
Powered by Bing
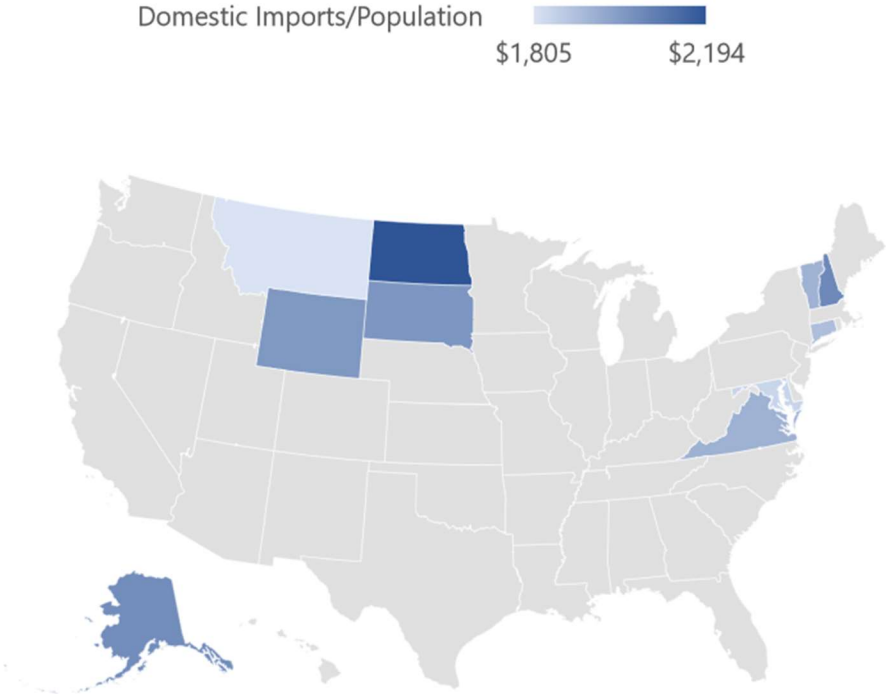© GeoNames, Microsoft, TomTom

Aerospace Domestic Imports, 2022
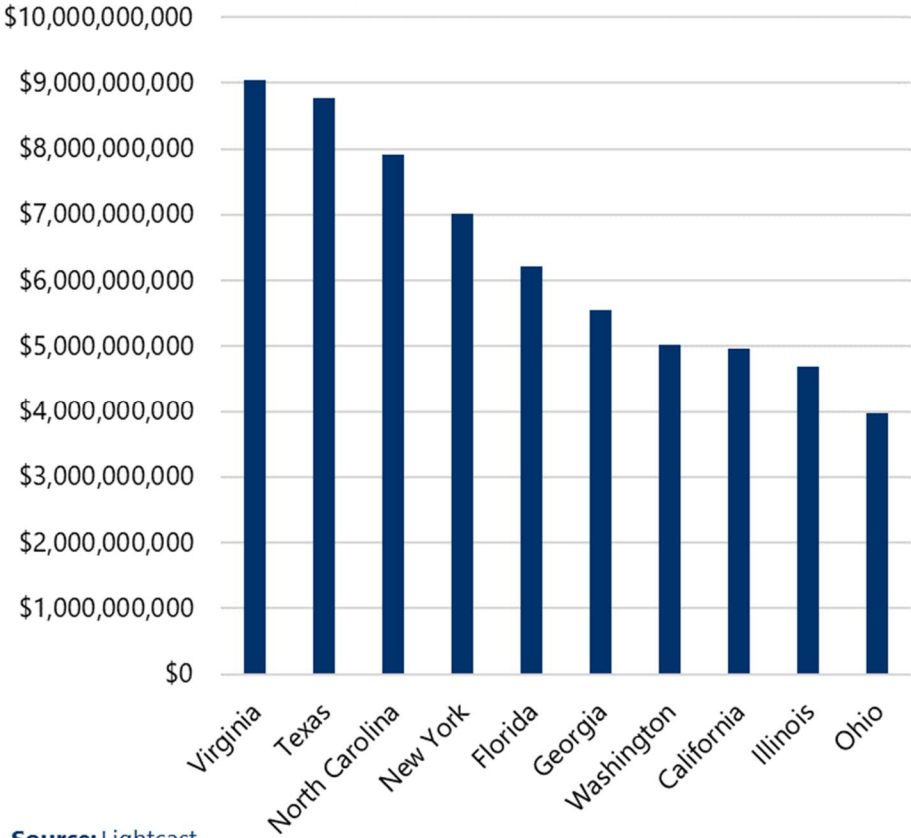
Source: Lightcast

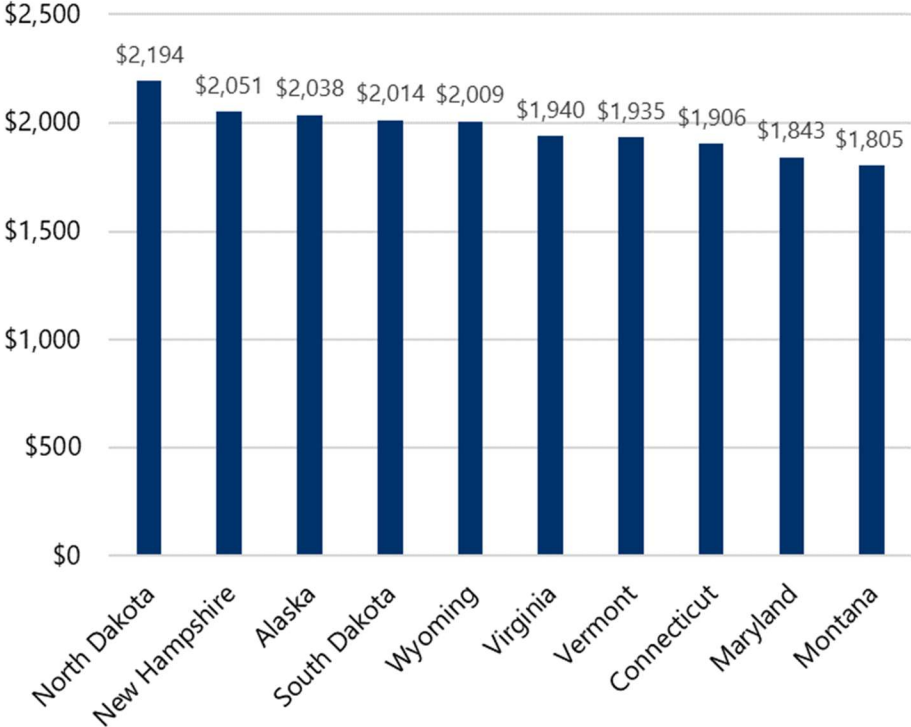## Domestic Imports Per Population

When controlling population size, the top ten states below all import over $600 of Aerospace goods and services per person annually. Hawaii, Alaska, and Virginia had the most domestic imports per person for Aerospace industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Aerospace industries.

Aerospace Dollars of Domestic Imports Per Population, 2022
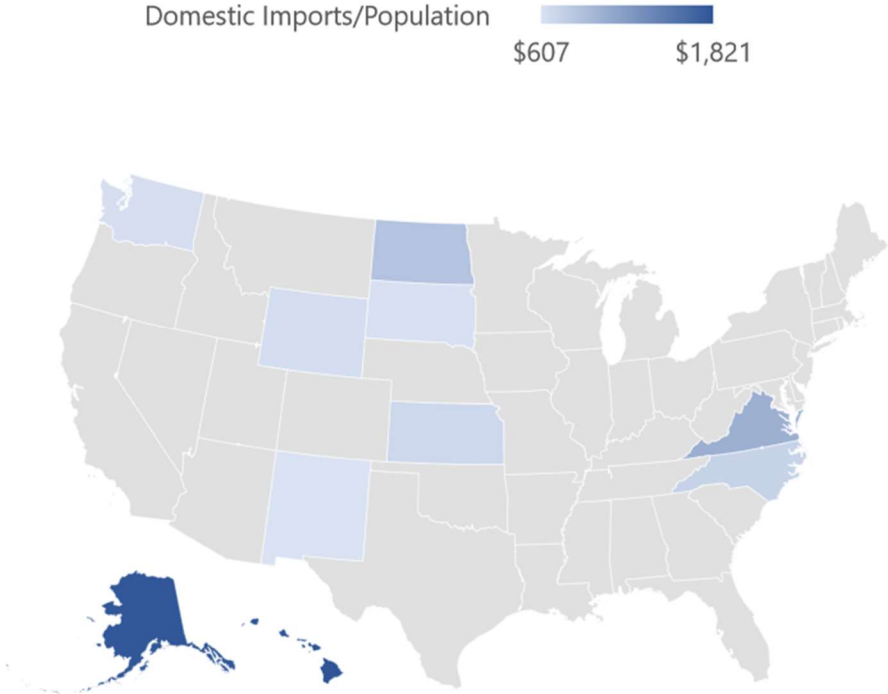
Domestic Imports/Population

$607 $1,821

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Aerospace Dollars of Domestic Imports Per Population, 2022

State	Value
Hawaii	$1,821
Alaska	$1,796
Virginia	$1,040
North Dakota	$877
North Carolina	$746
Kansas	$698
Wyoming	$652
Washington	$645
South Dakota	$626
New Mexico	$607
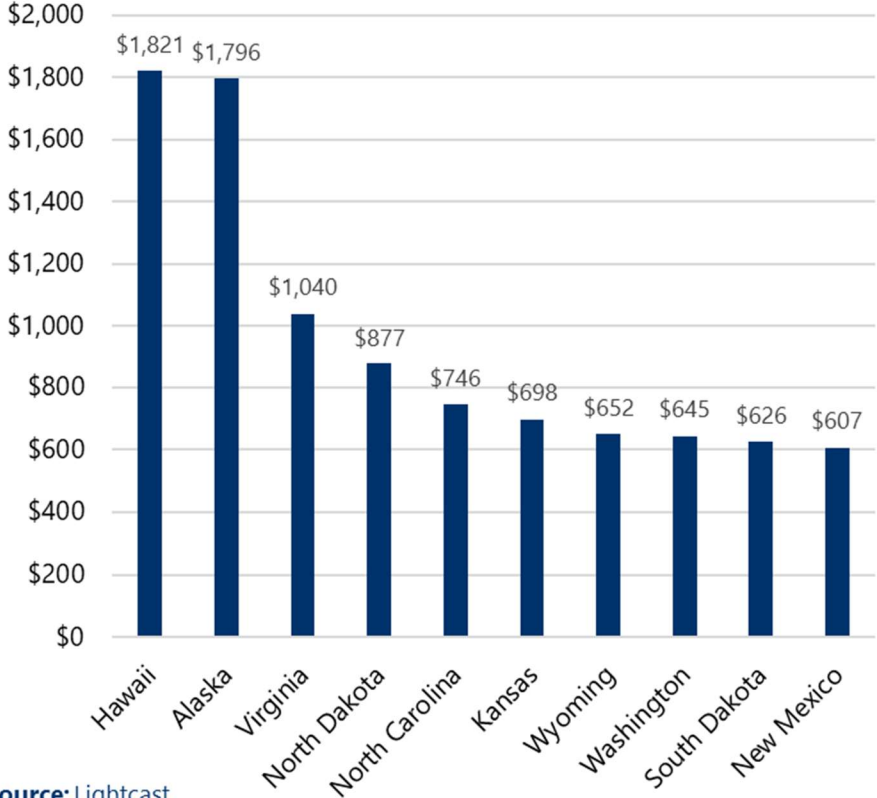
Source: Lightcast

Agriculture
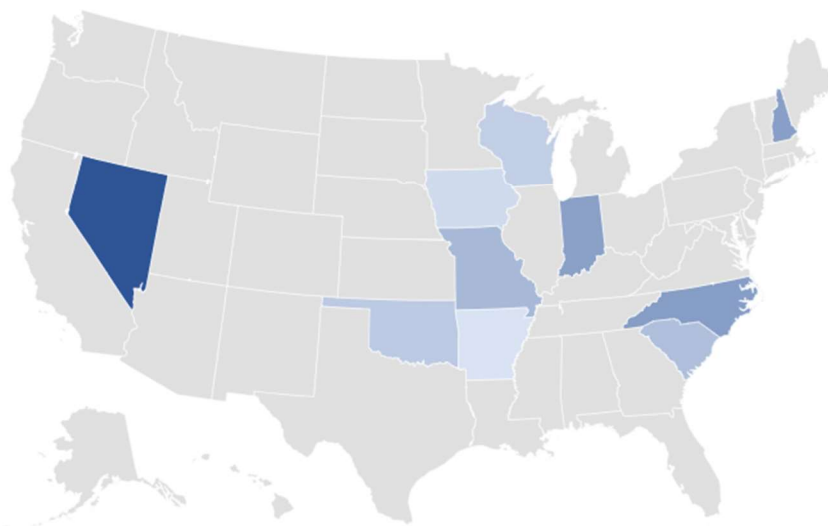
Employment Concentration

Ten states had an employment concentration greater than 1.98, meaning they were at least 98% more concentrated than the national average in Agriculture industries. North Dakota, South Dakota, and Nebraska had the largest the largest employment concentration in Food and Beverage Manufacturing industries in 2022. Maine was not among the top ten states in terms of employment concentration in Food and Beverage Manufacturing industries.
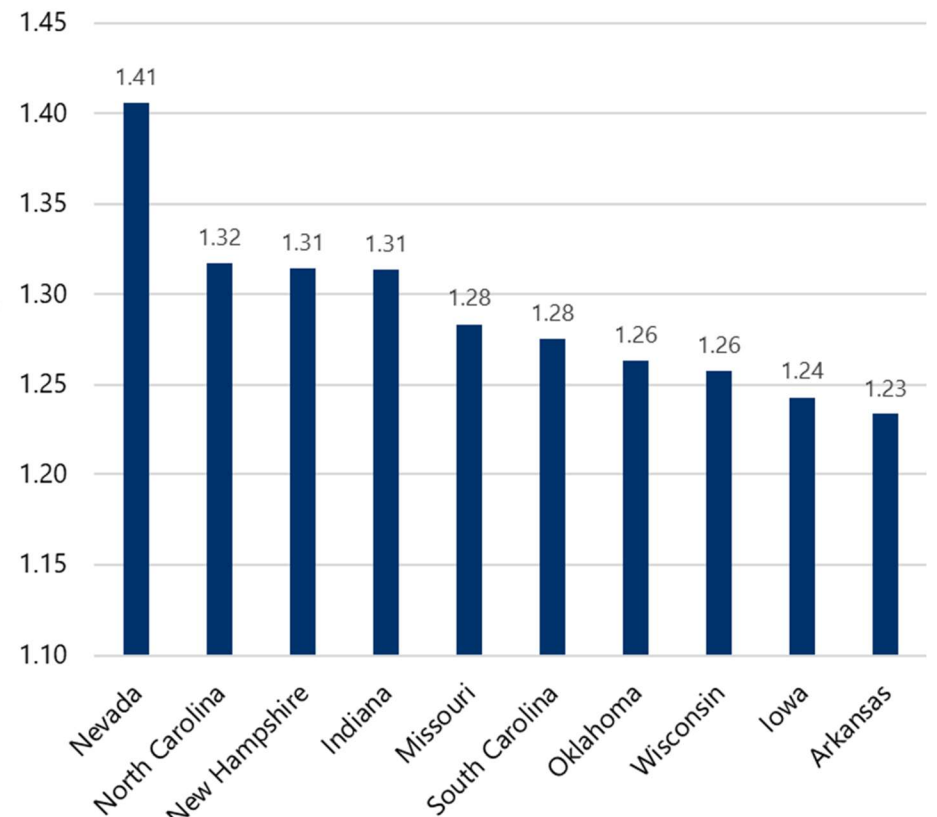

Agriculture Employment Concentration, 2022
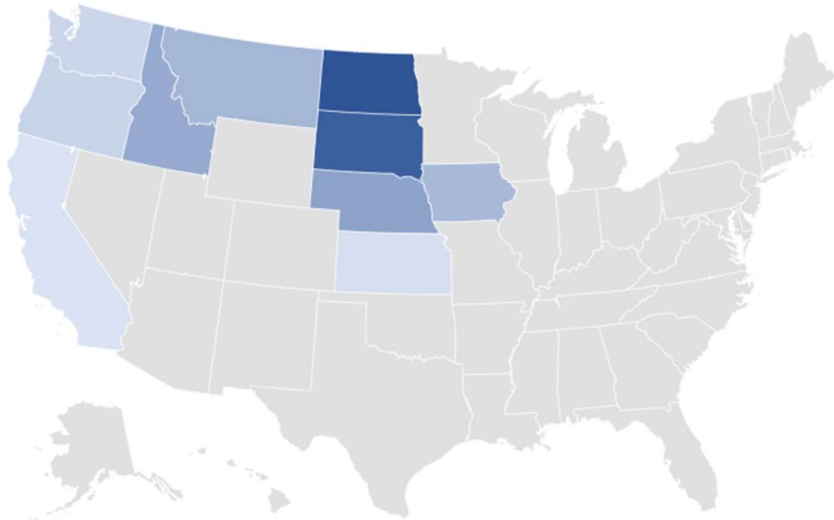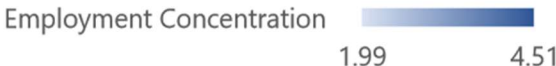
Employment Concentration

1.99   4.51

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Agriculture Employment Concentration, 2022

State	Concentration
North Dakota	4.51
South Dakota	4.30
Nebraska	3.12
Idaho	2.99
Montana	2.77
Iowa	2.71
Oregon	2.26
Washington	2.21
Kansas	2.07
California	1.99

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Food and Beverage Manufacturing industries greater than $11 billion. Texas, Illinois, and Iowa had the most domestic imports for Agriculture industries in 2022. Maine was not among the top ten states in terms of domestic imports Agriculture industries in 2022.
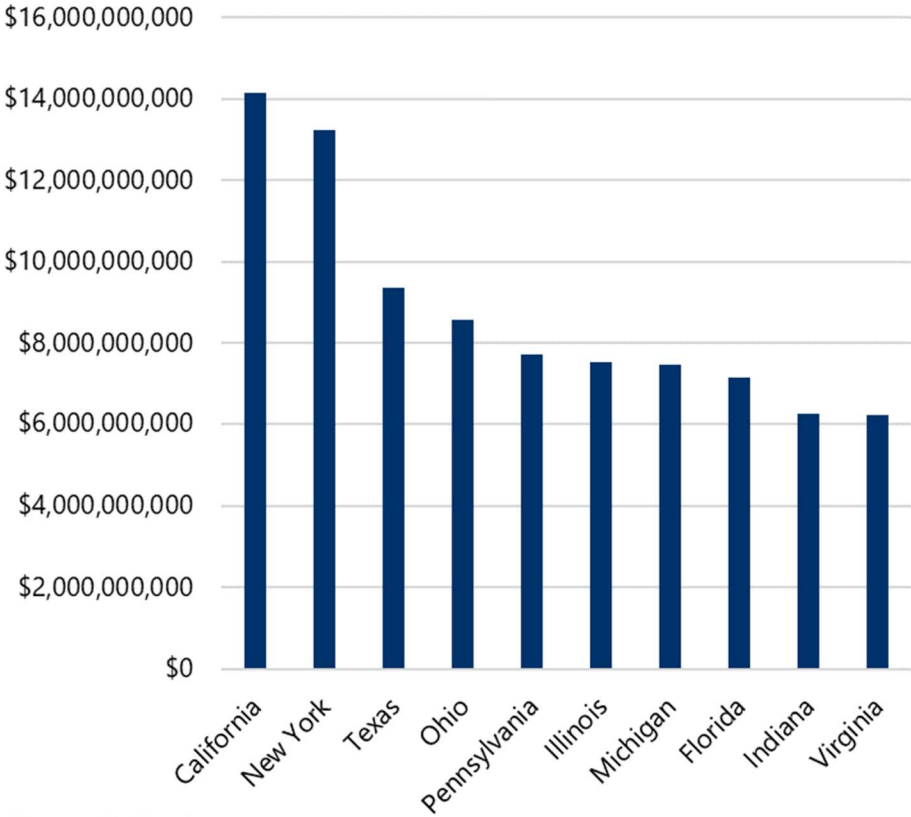

Agriculture Domestic Imports, 2022

Domestic Imports

$20,372,992,367
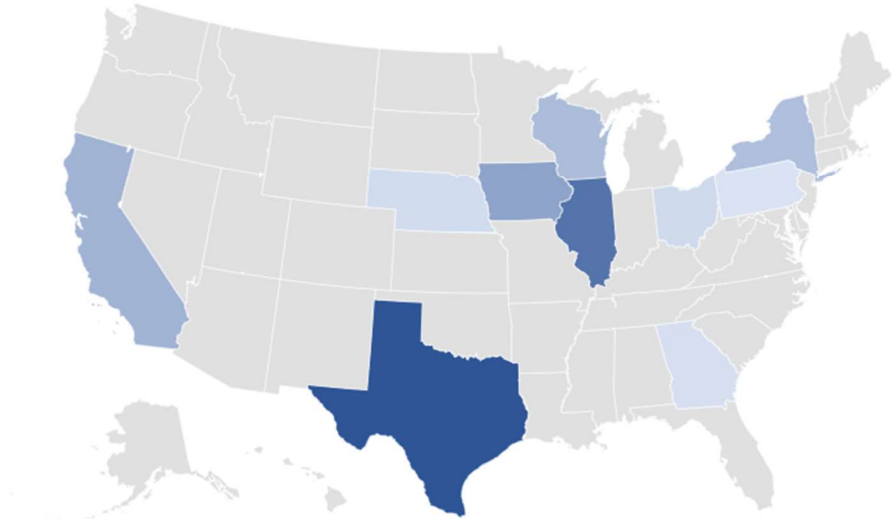
Powered by Bing
© GeoNames, Microsoft, TomTom
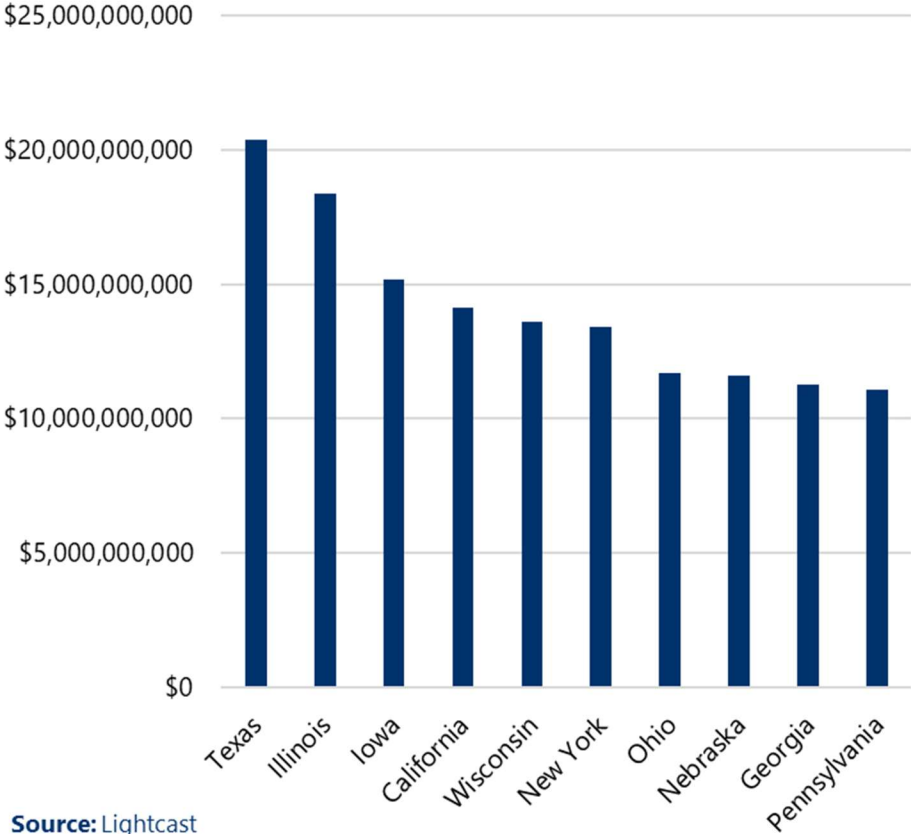
Source: Lightcast

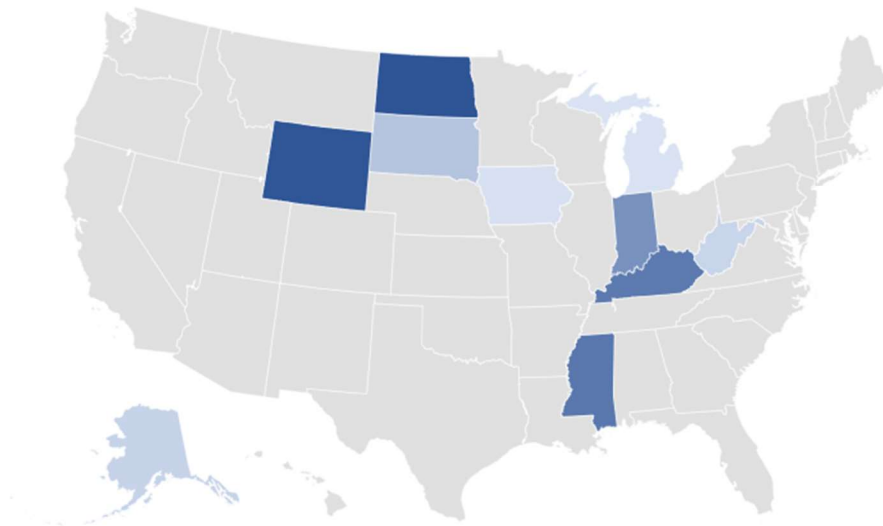**Agriculture Domestic Imports, 2022**

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $1,200 of Agriculture goods and services per person annually. North Dakota, South Dakota, and Iowa had the most domestic imports per person for Agriculture industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Agriculture industries.

Agriculture of Domestic Imports Per Population, 2022

Domestic Imports/Population

$1,254 $4,290
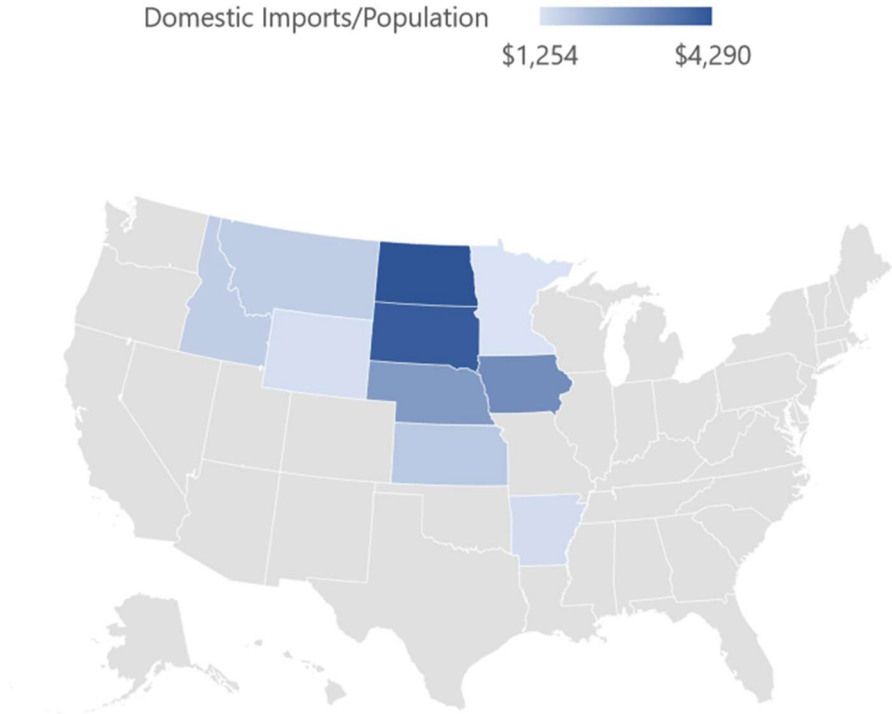
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Agriculture Dollar of Domestic Imports Per Population, 2022

- North Dakota: $4,290
- South Dakota: $4,109
- Iowa: $3,108
- Nebraska: $2,814
- Kansas: $1,817
- Montana: $1,728
- Idaho: $1,701
- Arkansas: $1,403
- Wyoming: $1,335
- Minnesota: $1,254
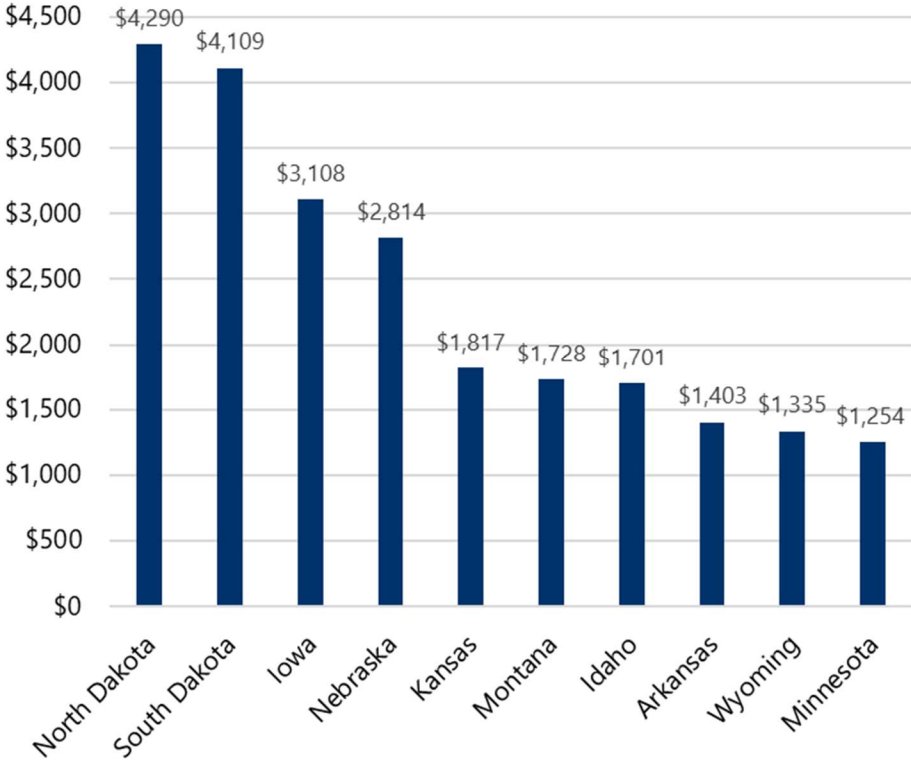
Source: Lightcast

Biomedical Manufacturing

Employment Concentration

Ten states had an employment concentration greater than 1.26, meaning they were at least 26% more concentrated than the national average in Biomedical Manufacturing industries. Minnesota, Utah, Indiana had the largest the largest employment concentration in Biomedical Manufacturing industries in 2022. Maine was not among the top ten states in terms of employment concentration in Biomedical Manufacturing industries.

Biomedical Manufacturing Employment Concentration, 2022

Employment Concentration
1.27   2.05
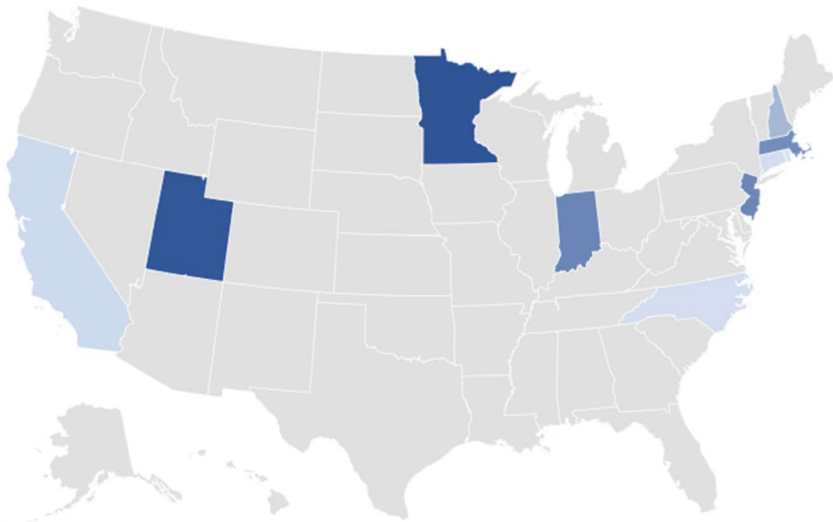
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Biomedical Manufacturing Employment Concentration, 2022

State	Concentration
Minnesota	2.05
Utah	2.04
Indiana	1.78
New Jersey	1.77
Massachusetts	1.74
New Hampshire	1.50
California	1.32
Connecticut	1.30
North Carolina	1.30
Rhode Island	1.27
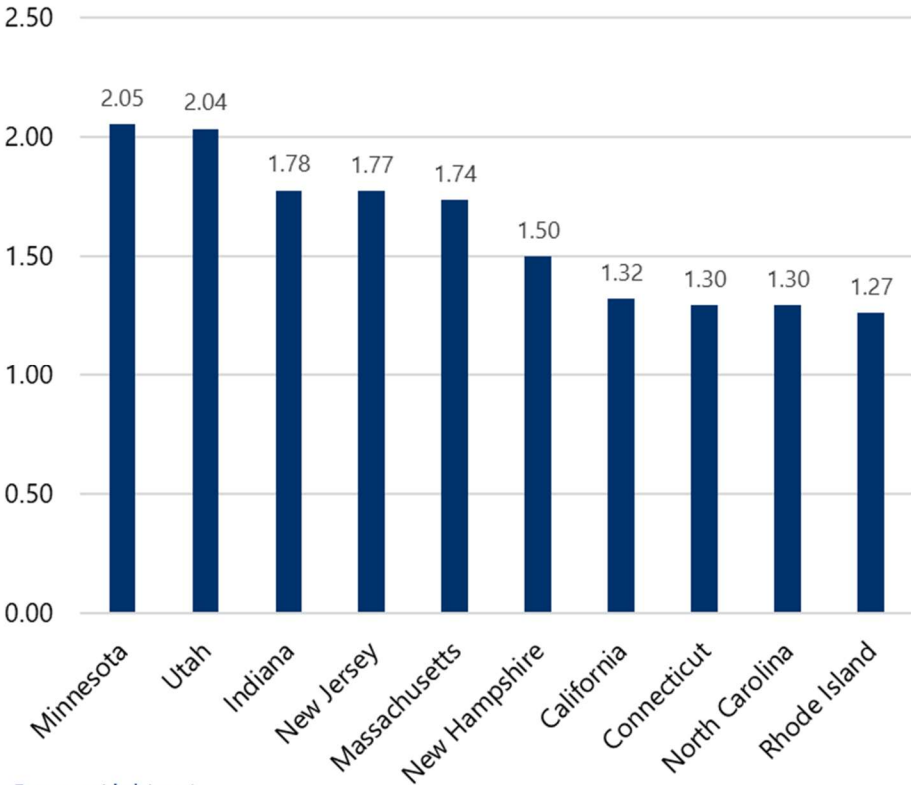
Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Biomedical Manufacturing industries greater than $14 billion. Texas, New York, and California had the most domestic imports for Biomedical Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports for Biomedical Manufacturing industries in 2022.

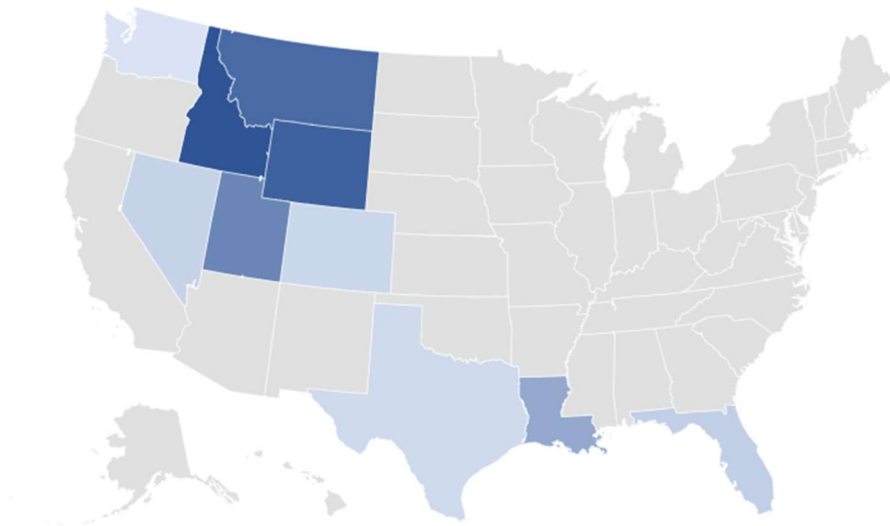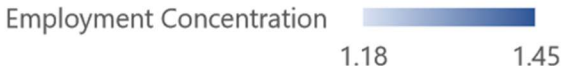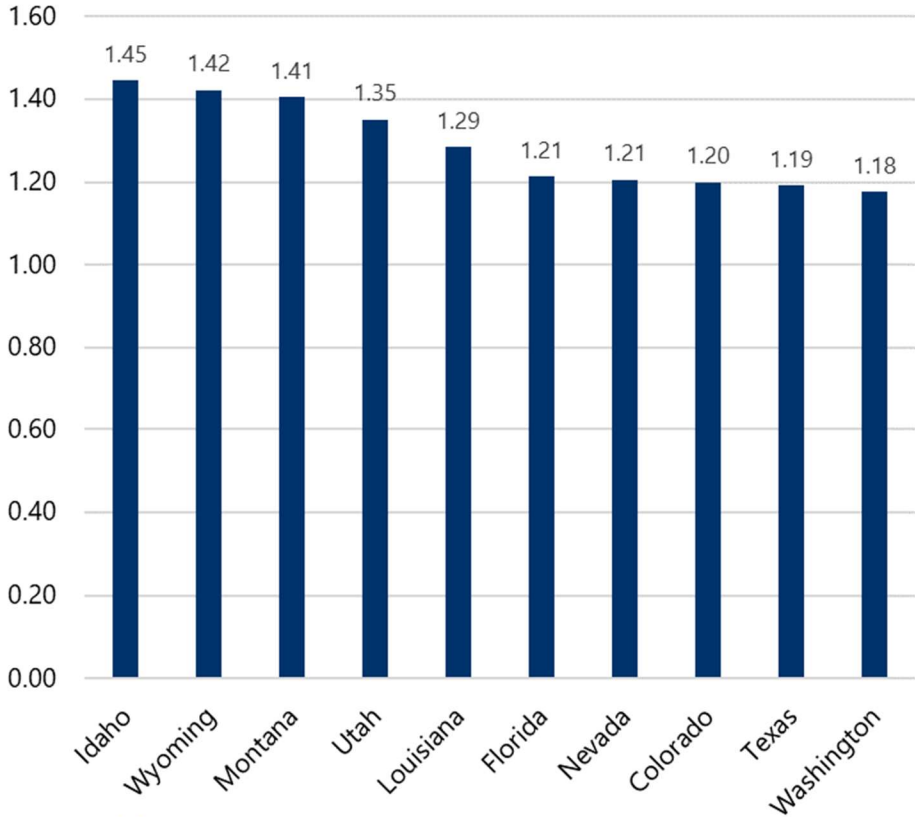**Biomedical Manufacturing Domestic Imports, 2022**

Domestic Imports

$33,807,227,372
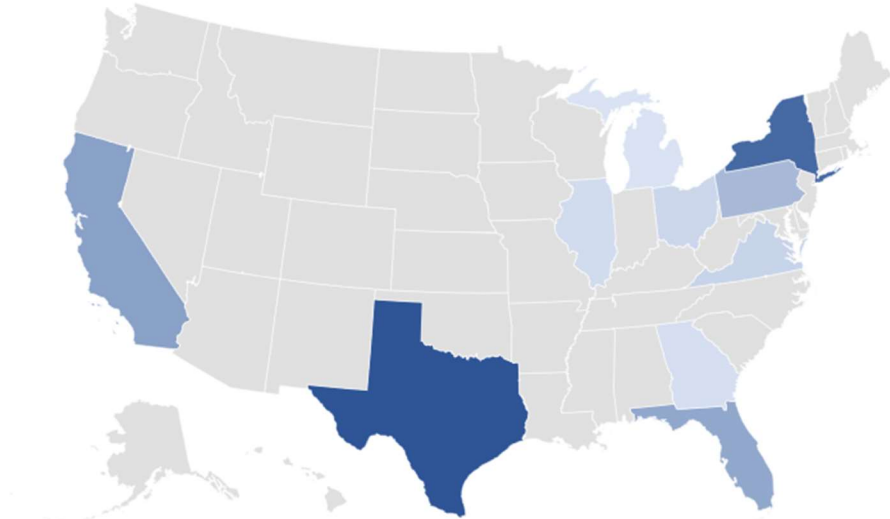
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Biomedical Manufacturing Domestic Imports, 2022
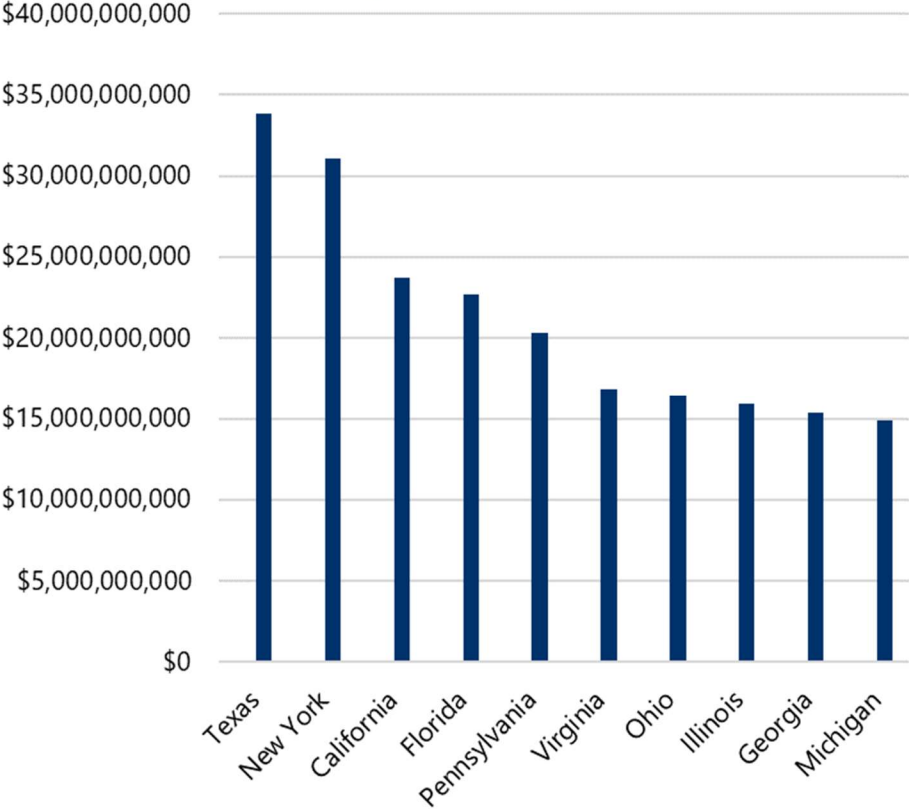
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $4,000 of Biomedical Manufacturing goods and services per person. North Dakota, New Hampshire, and Alaska had the most domestic imports per person for Biomedical Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Biomedical Manufacturing industries.

Biomedical Manufacturing Domestic Imports Per Population , 2022

Domestic Imports/Population

$1,805 $2,194

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Biomedical Manufacturing Domestic Imports Per Population, 2022

North Dakota: $2,194
New Hampshire: $2,051
Alaska: $2,038
South Dakota: $2,014
Wyoming: $2,009
Virginia: $1,940
Vermont: $1,935
Connecticut: $1,906
Maryland: $1,843
Montana: $1,805

Source: Lightcast

Clean Energy

Employment Concentration

Ten states had an employment concentration greater than 1.22, meaning they were at least 22% more concentrated than the national average in Clean Energy industries. Nevada, North Carolina, and New Hampshire had the largest employment concentration in Clean Energy industries in 2022. Maine was not among the top ten states in terms of employment concentration in Clean Energy industries.
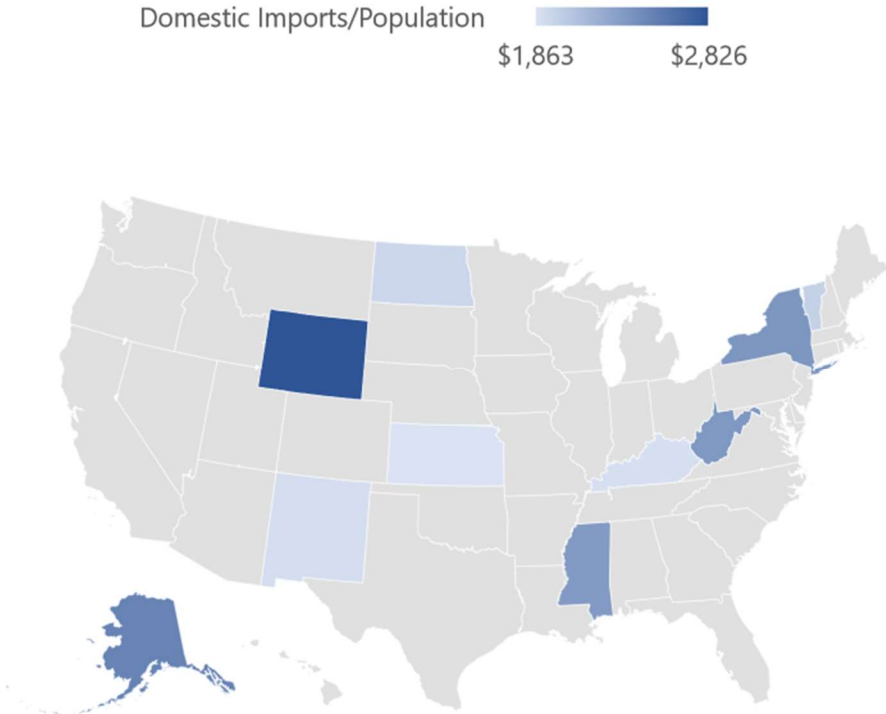
Clean Energy Employment Concentration, 2022

Employment Concentration
1.23 — 1.41

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Clean Energy Employment Concentration, 2022

State	Concentration
Nevada	1.41
North Carolina	1.32
New Hampshire	1.31
Indiana	1.31
Missouri	1.28
South Carolina	1.28
Oklahoma	1.26
Wisconsin	1.26
Iowa	1.24
Arkansas	1.23

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Clean Energy Industries greater than $6.2 billion. California, New York, and Texas had the most domestic imports for Clean Energy industries in 2022. Maine was not among the top ten states in terms of domestic imports for Clean Energy industries in 2022.

Clean Energy Domestic Imports, 2022

Domestic Imports $14,157,604,261
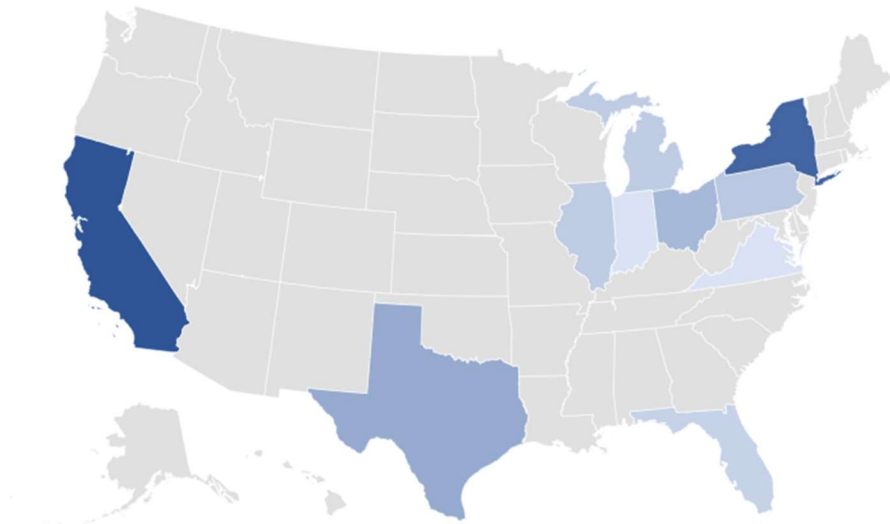
Clean Energy Domestic Imports, 2022

Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $700 of Clean Energy goods and services per person annually. North Dakota, Wyoming, and Mississippi had the most domestic imports per person for Clean Energy industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Clean Energy industries.

Clean Energy Domestic Imports Per Population, 2022

Domestic Imports/Population

$742 $1,041

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Clean Energy Domestic Imports Per Population, 2022

State	Value
North Dakota	$1,041
Wyoming	$1,040
Mississippi	$966
Kentucky	$960
Indiana	$912
South Dakota	$806
Alaska	$776
West Virginia	$771
Iowa	$746
Michigan	$742
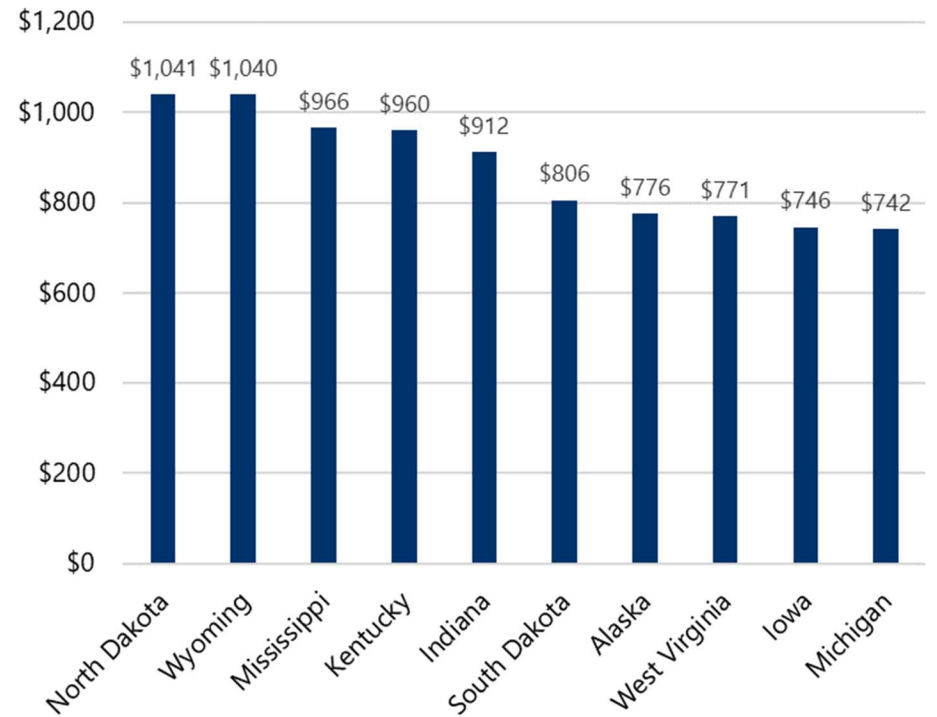
Source: Lightcast

Construction

Employment Concentration

Ten states had an employment concentration greater than 1.17, meaning they were at least 17% more concentrated than the national average in Construction industries. Idaho, Wyoming, and Montana had the largest the largest employment concentration in Construction industries in 2022. Maine was not among the top ten states in terms of employment concentration in Construction industries.

Construction Employment Concentration, 2022

Employment Concentration

1.18 — 1.45

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Construction Employment Concentration, 2022

State	Concentration
Idaho	1.45
Wyoming	1.42
Montana	1.41
Utah	1.35
Louisiana	1.29
Florida	1.21
Nevada	1.21
Colorado	1.20
Texas	1.19
Washington	1.18

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Clean Energy industries greater than $6.2 billion., New York, California, and Texas had the most domestic imports for Clean Energy industries in 2022. Maine was not among the top ten states in terms of domestic imports for Clean Energy industries in 2022.
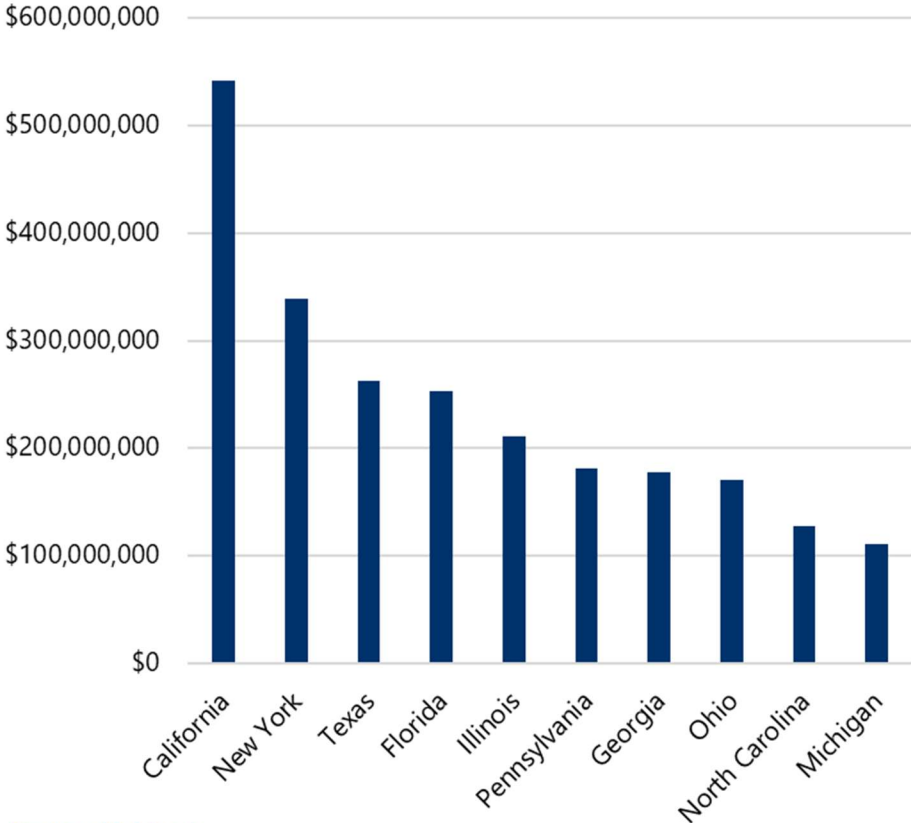

Construction Domestic Imports, 2022

Domestic Imports

$47,589,236,802
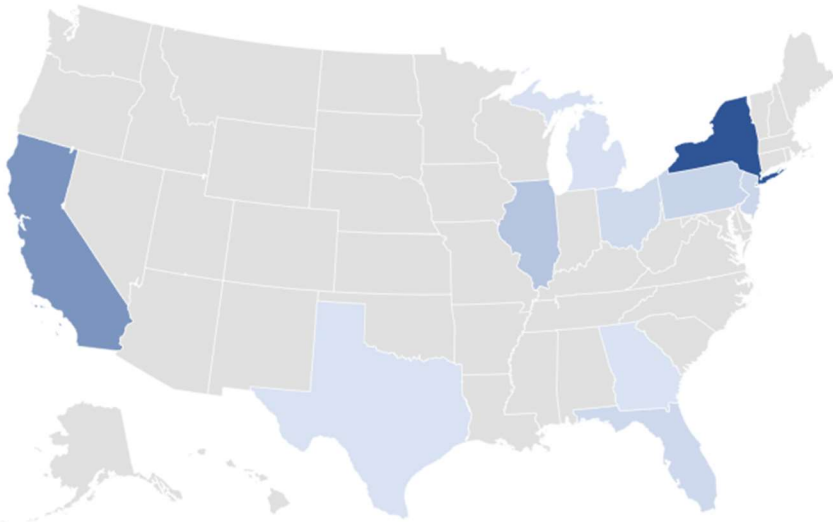
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Construction Domestic Imports, 2022
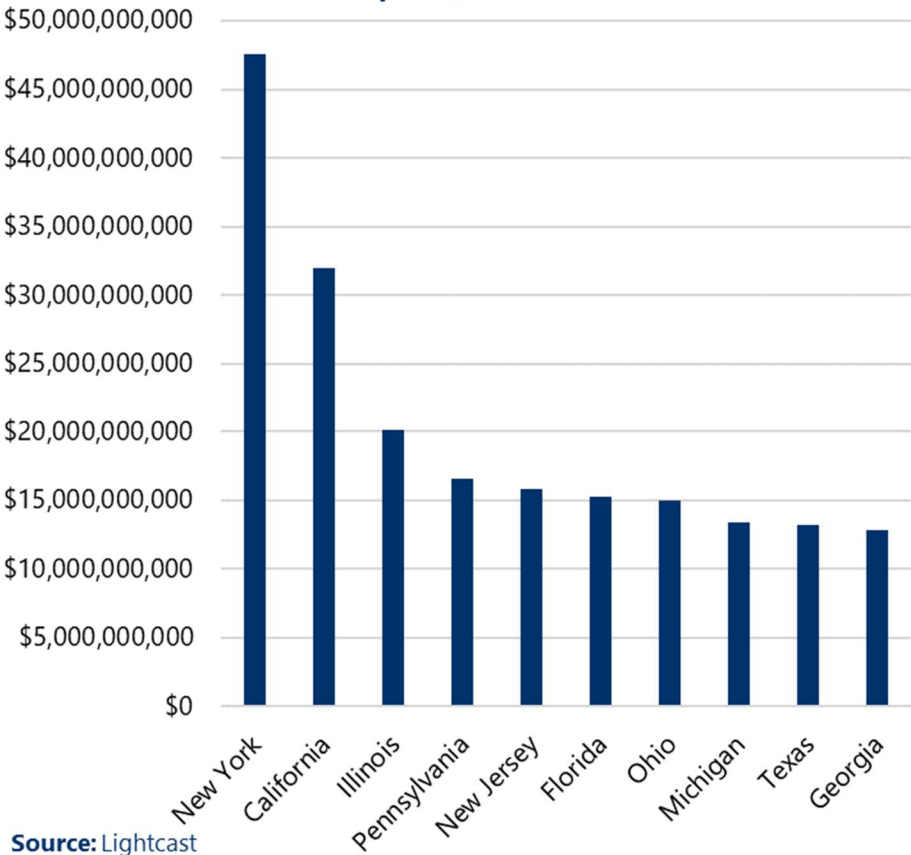
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states all import over $1,800 of Construction goods and services per person annually. Wyoming, Alaska, and New York had the most domestic imports per person for Construction industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Construction industries.

Construction Domestic Imports Per Population, 2022

Domestic Imports/Population

$1,863 $2,826

Construction Domestic Imports Per Population, 2022

State	Value
Wyoming	$2,826
Alaska	$2,509
New York	$2,382
West Virginia	$2,367
Mississippi	$2,350
Vermont	$1,986
North Dakota	$1,941
New Mexico	$1,898
Kentucky	$1,881
Kansas	$1,863
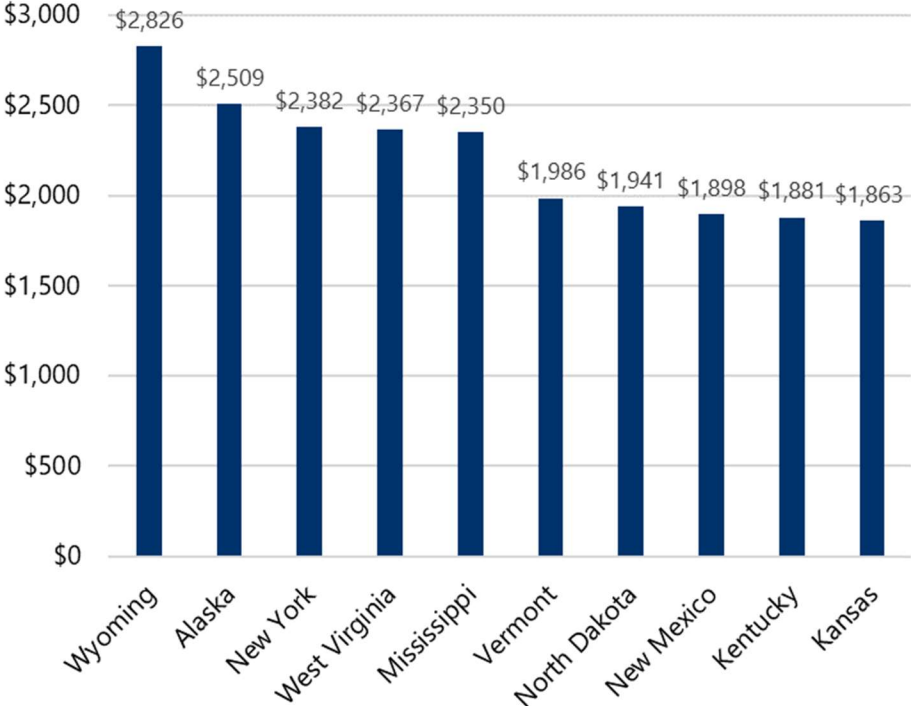
Powered by Bing
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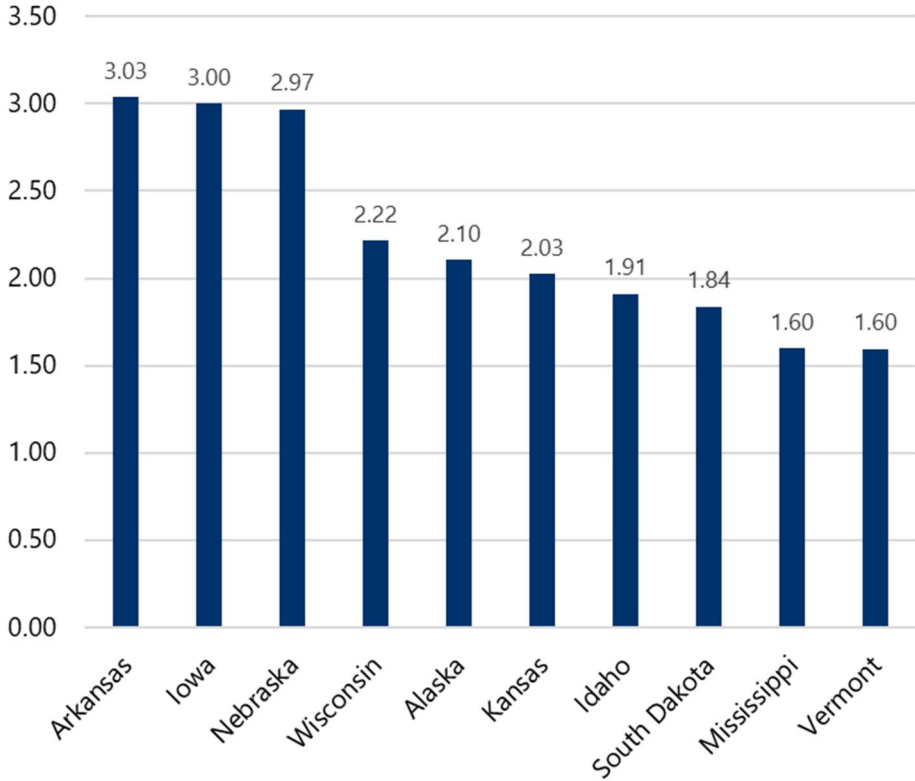**Source:** Lightcast

Fishing

Employment Concentration

Ten states had an employment concentration greater than 1.60, meaning they were at least 60% more concentrated than the national average in Fishing industries. Alaska, Maine, and Rhode Island had the largest the largest employment concentration in Fishing industries in 2022. Maine had the second highest employment concentration in Fishing industries, with an employment concentration of 43.00.

Fishing Employment Concentration, 2022

Employment Concentration

1.61   46.19
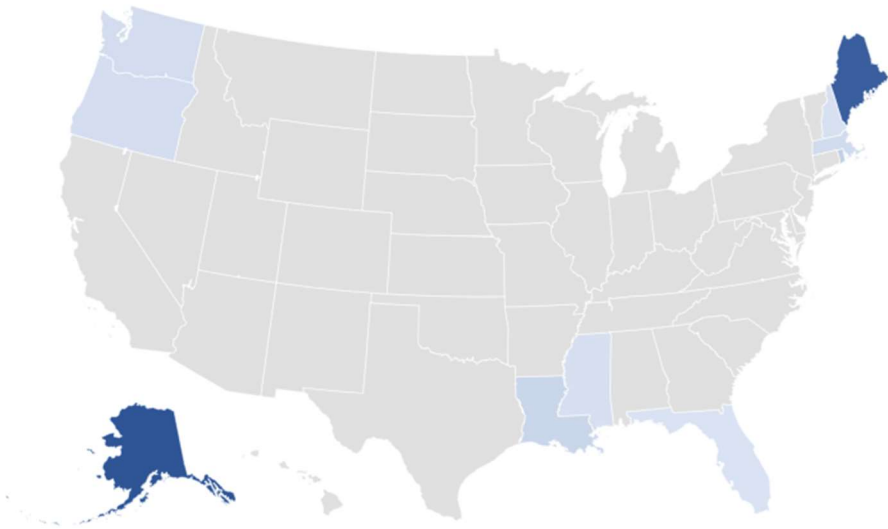
Powered by Bing
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Fishing Employment Concentration, 2022

State	Concentration
Alaska	46.19
Maine	43.00
Rhode Island	7.61
Louisiana	5.75
Massachusetts	3.92
Washington	3.35
Oregon	3.16
Mississippi	2.44
New Hampshire	2.26
Florida	1.61
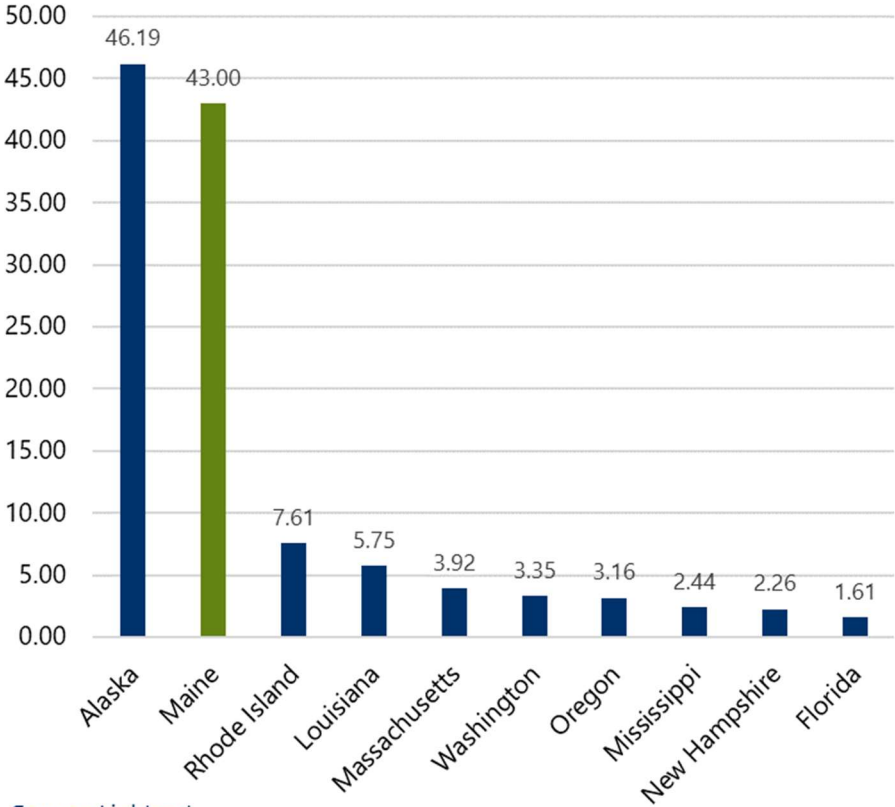
Source: Lightcast

Domestic Imports

Below are the top ten states that had domestic imports for Fishing Industries greater than $110 million. California, New York, and Texas had the most domestic imports for Fishing industries in 2022. Maine was not among the top ten states in terms of domestic imports Fishing Industries in 2022.

Fishing Domestic Imports, 2022

Domestic Imports

$110,455,193 $542,066,560
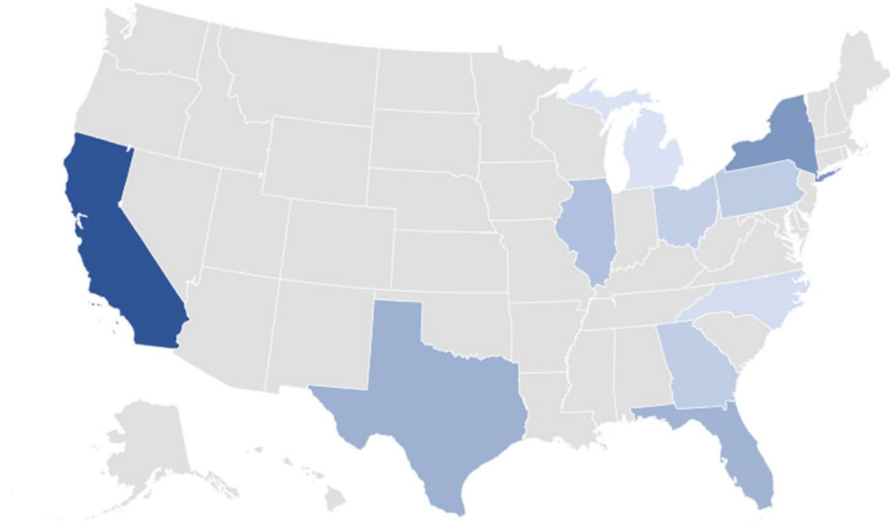
Powered by Bing
© GeoNames, Microsoft, TomTom
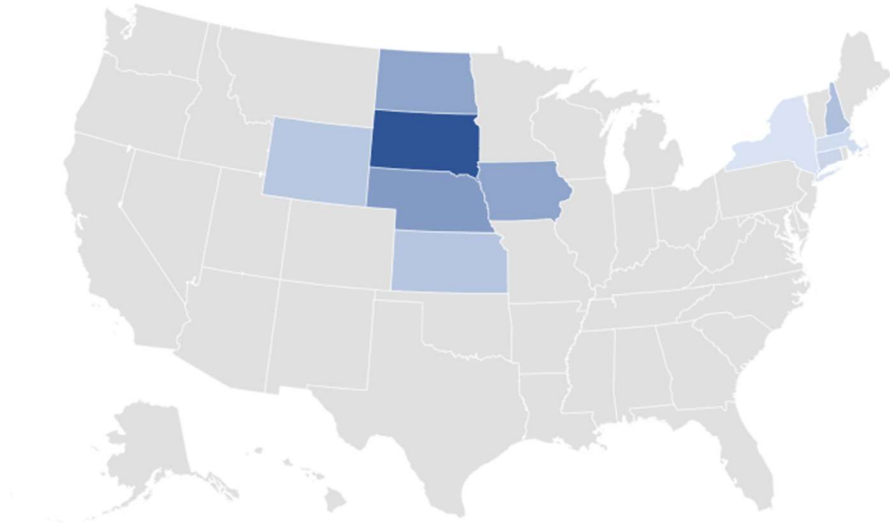

Fishing Domestic Imports, 2022

Source: Lightcast

Domestic Imports Per Population

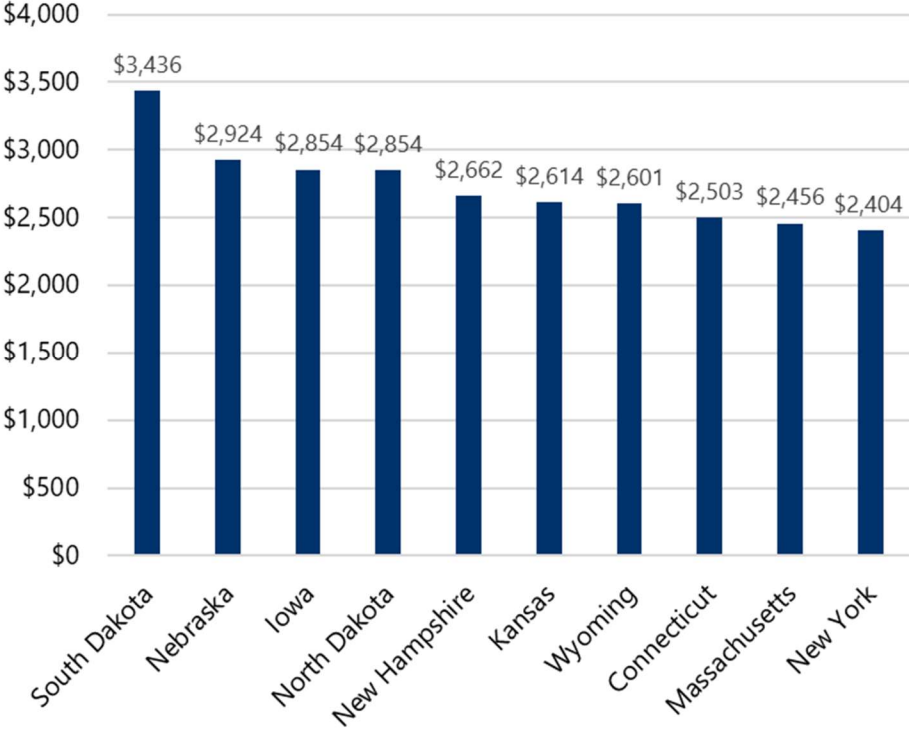When controlling for population size, the top ten states below all import over $15 of Fishing goods and services per person annually. Alaska, Nebraska, and Iowa had the most domestic imports per person for Fishing industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Fishing Industries.

Fishing Domestic Imports Per Population, 2022

Domestic Imports/Population

$17 $32
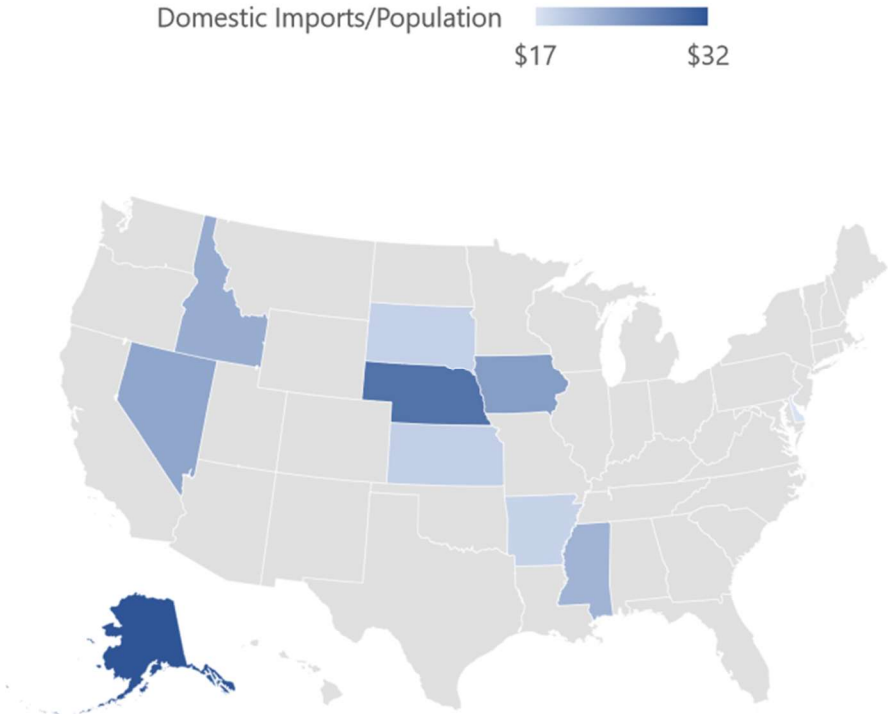
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Fishing Dollar Domestic Imports Per Population, 2022
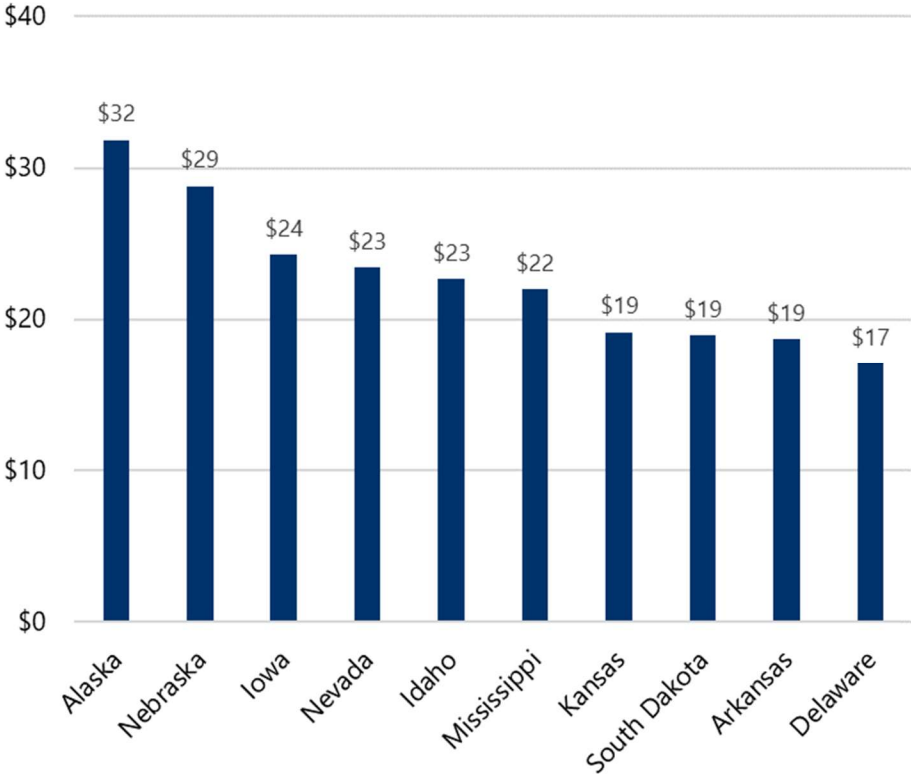
| State	Value
Alaska	$32
Nebraska	$29
Iowa	$24
Nevada	$23
Idaho	$23
Mississippi	$22
Kansas	$19
South Dakota	$19
Arkansas	$19
Delaware	$17

Source: Lightcast

Food and Beverage Manufacturing
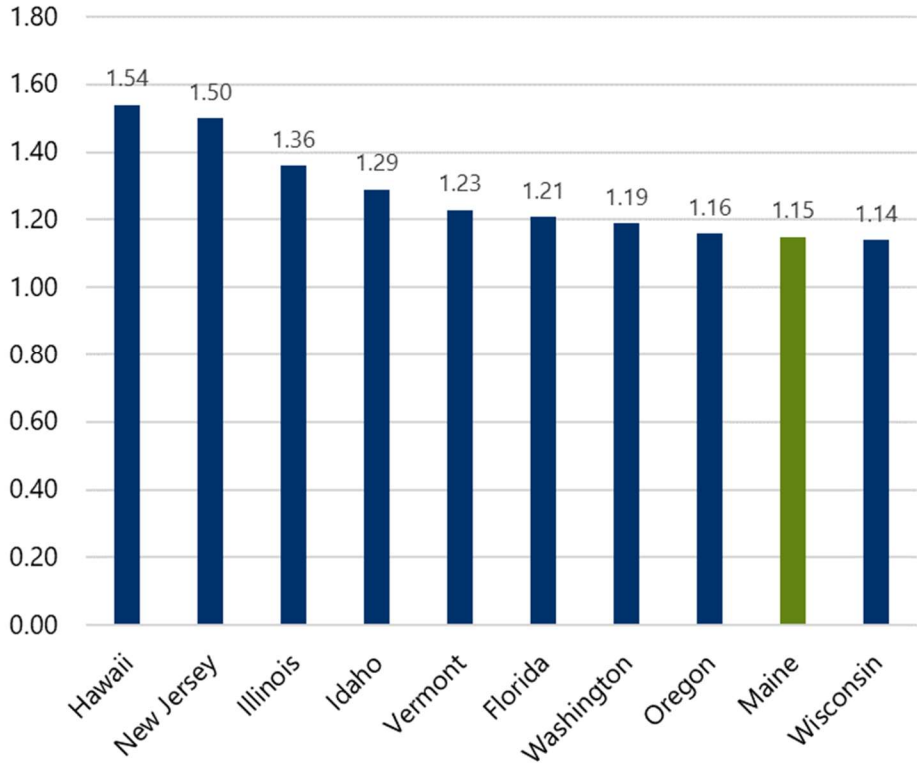
Employment Concentration

Ten states had an employment concentration greater than 1.59, meaning they were at least 59% more concentrated than the national average in Food and Beverage Manufacturing industries. Arkansas, Iowa, and Nebraska had the largest the largest employment concentration in Food and Beverage Manufacturing industries in 2022. Maine was not among the top ten states in terms of employment concentration in Food and Beverage Manufacturing industries.

Food and Beverage Manufacturing Employment Concentration, 2022

Employment Concentration
1.60 — 3.03

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Food and Beverage Manufacturing Employment Concentration, 2022

| State	Concentration
Arkansas	3.03
Iowa	3.00
Nebraska	2.97
Wisconsin	2.22
Alaska	2.10
Kansas	2.03
Idaho	1.91
South Dakota	1.84
Mississippi	1.60
Vermont	1.60
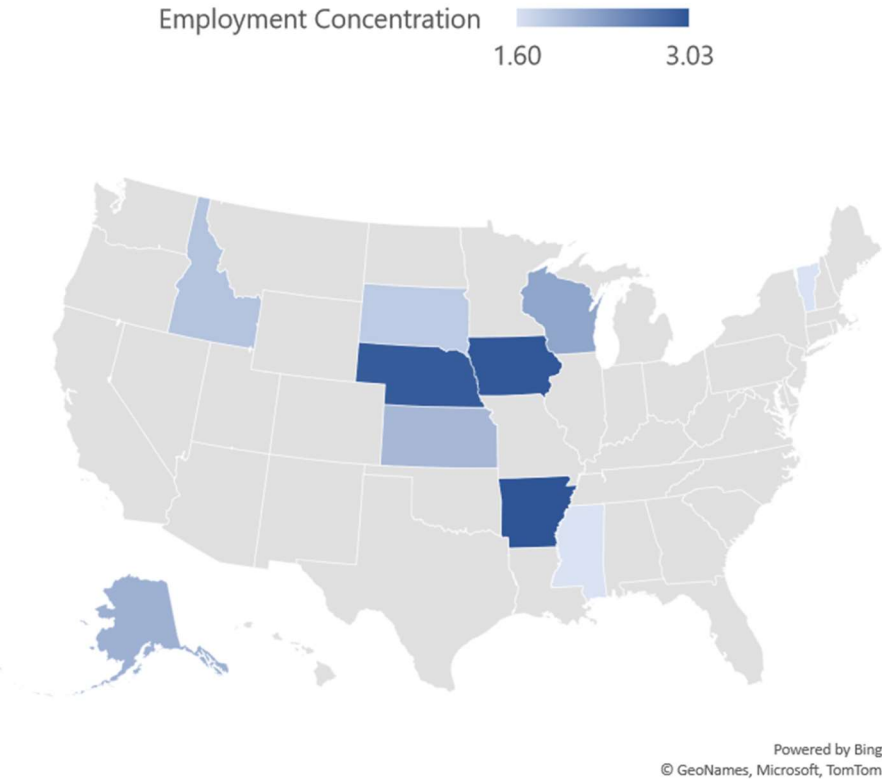
Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Food and Beverage Manufacturing industries greater than $17 billion. California, New York, and Texas had the most domestic imports for Food and Beverage Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports Food and Beverage Manufacturing industries in 2022.

Food and Beverage Manufacturing Domestic Imports, 2022
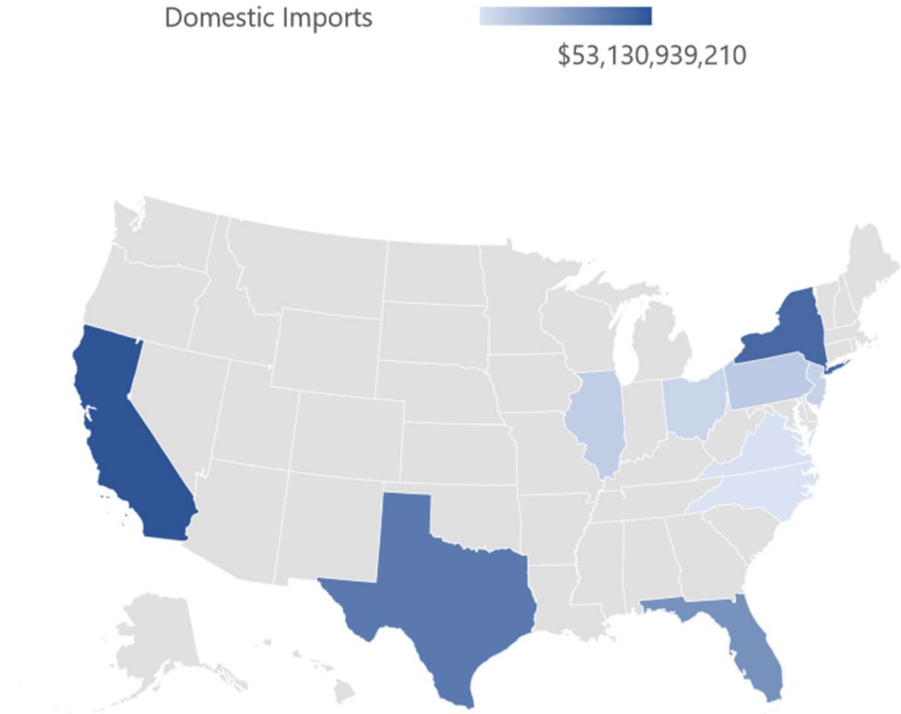
Domestic Imports

$53,130,939,210

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**Food and Beverage Manufacturing Domestic Imports, 2022**
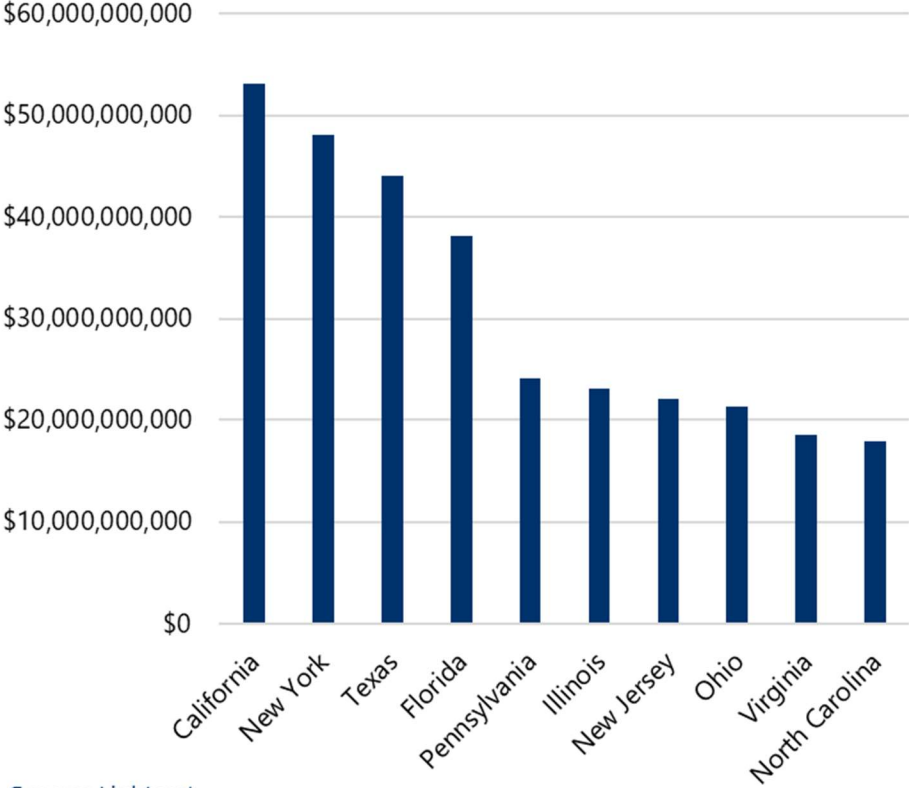
Source: Lightcast
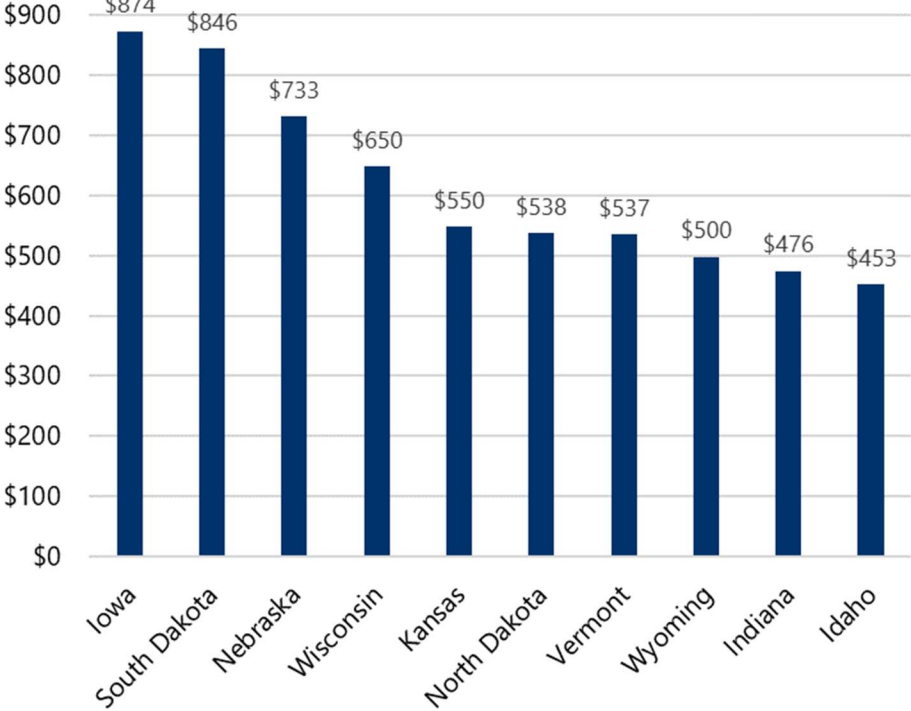
Domestic Imports Per Population

When controlling population size, the top ten states below all import over $2,000 of Food and Beverage Manufacturing goods and services per person annually. South Dakota, Nebraska, and Iowa had the most domestic imports per person for Food and Beverage Manufacturing industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Food and Beverage Manufacturing industries.

Food and Beverage Manufacturing Domestic Imports Per Population, 2022

Domestic Imports/Population

$2,404 — $3,436

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Food and Beverage Manufacturing Domestic Imports Per Population, 2022

State	Value
South Dakota	$3,436
Nebraska	$2,924
Iowa	$2,854
North Dakota	$2,854
New Hampshire	$2,662
Kansas	$2,614
Wyoming	$2,601
Connecticut	$2,503
Massachusetts	$2,456
New York	$2,404

Source: Lightcast

Food and Beverage Wholesale
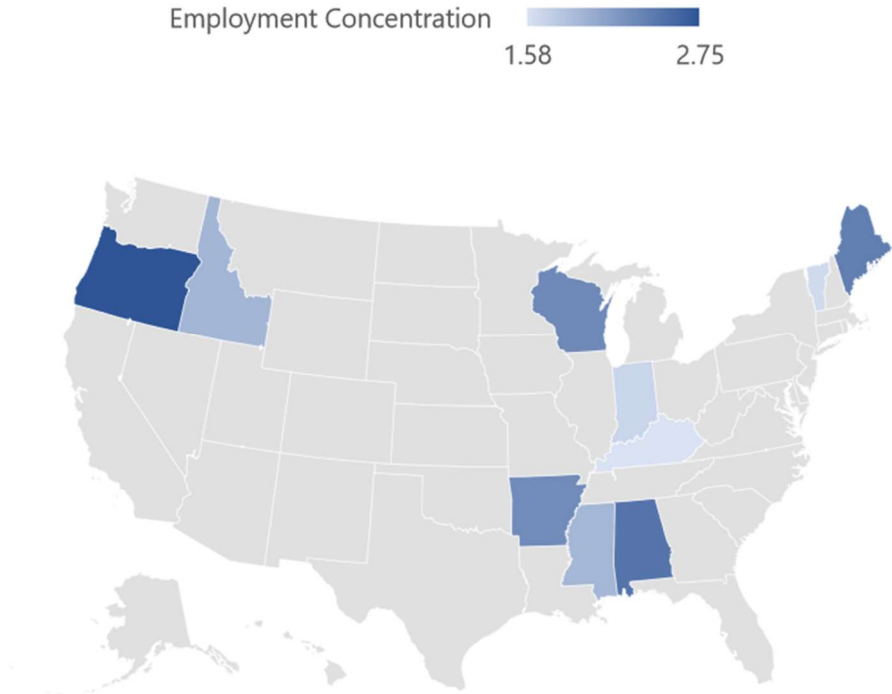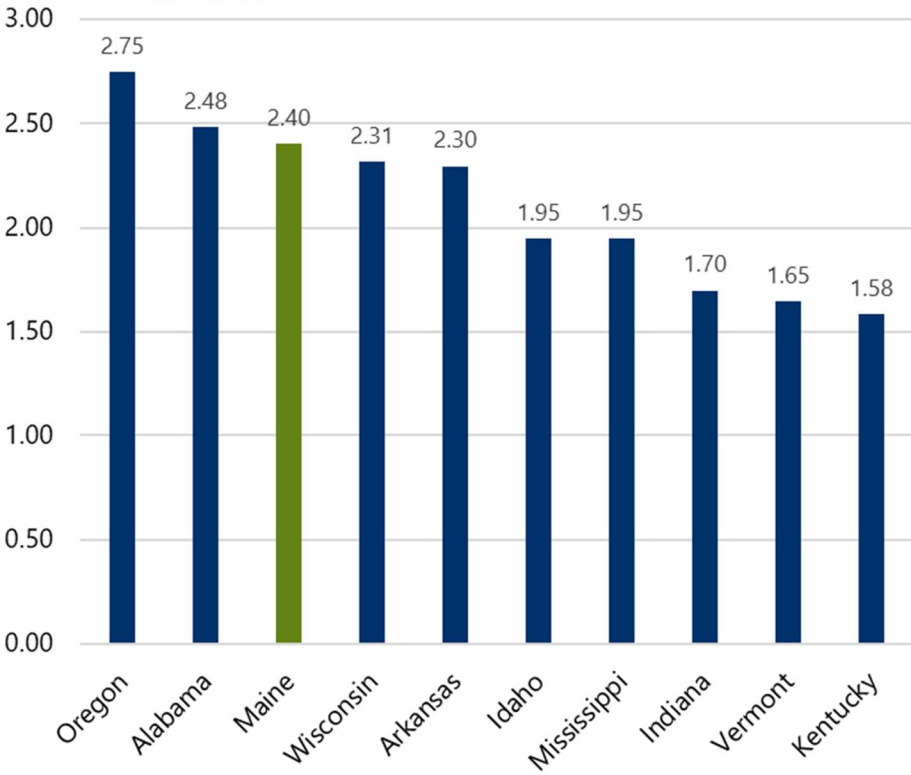
Employment Concentration

Ten states had an employment concentration greater than 1.13, meaning they were at least 14% more concentrated than the national average in Food and Beverage Wholesale industries. Hawaii, New Jersey, and Illinois had the largest the largest employment concentration in Food and Beverage Wholesale industries in 2022. Maine had the ninth highest employment concentration in Food and Beverage Wholesale Industries, with an employment concentration of 1.15.

Food and Beverage Wholesale Employment Concentration, 2022
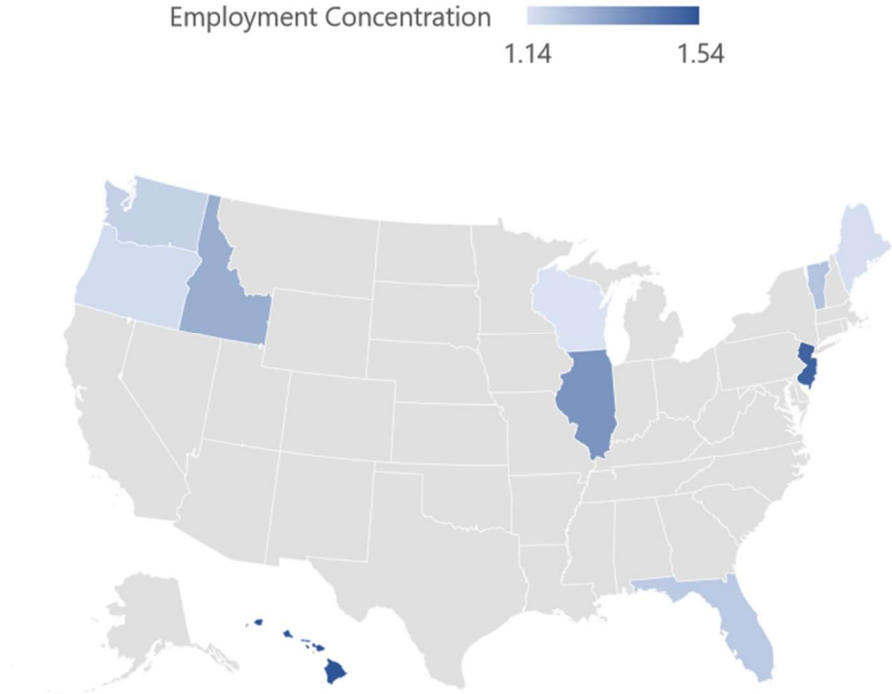
Employment Concentration
1.14   1.54

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Food and Beverage Wholesale Employment Concentration, 2022

| State	Concentration
Hawaii	1.54
New Jersey	1.50
Illinois	1.36
Idaho	1.29
Vermont	1.23
Florida	1.21
Washington	1.19
Oregon	1.16
Maine	1.15
Wisconsin	1.14

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Food and Beverage Wholesale Industries greater than $2.8 billion. Pennsylvania, Ohio, and California had the most domestic imports for Food and Beverage Wholesale industries in 2022. Maine was not among the top ten states in terms of domestic imports for Food and Beverage Wholesale Industries.

Food and Beverage Wholesale Domestic Imports, 2022

Domestic Imports

$5,396,534,898
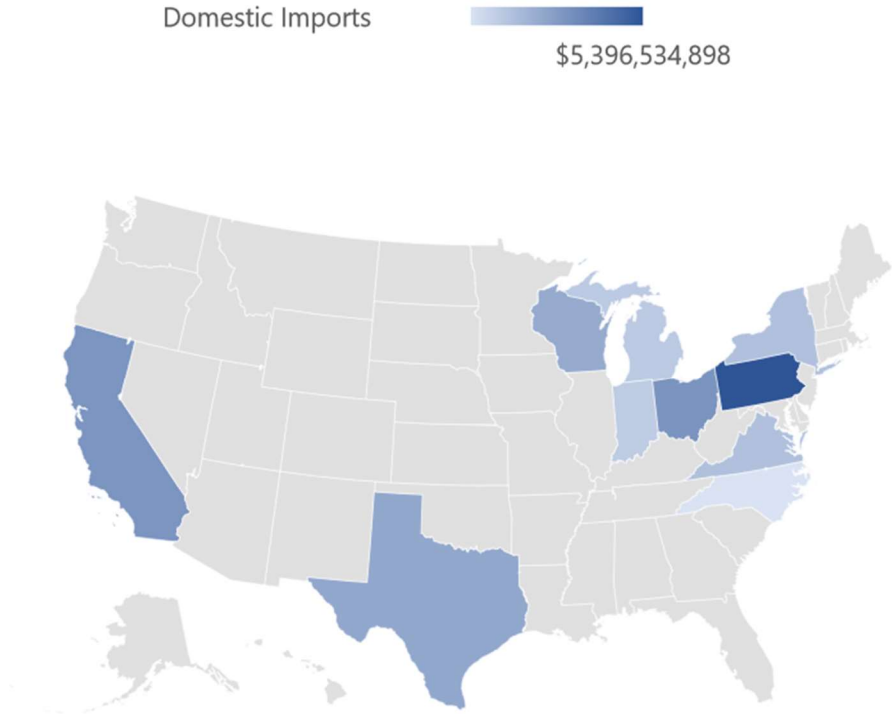
Powered by Bing
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**Food and Beverage Wholesale Domestic Imports, 2022**
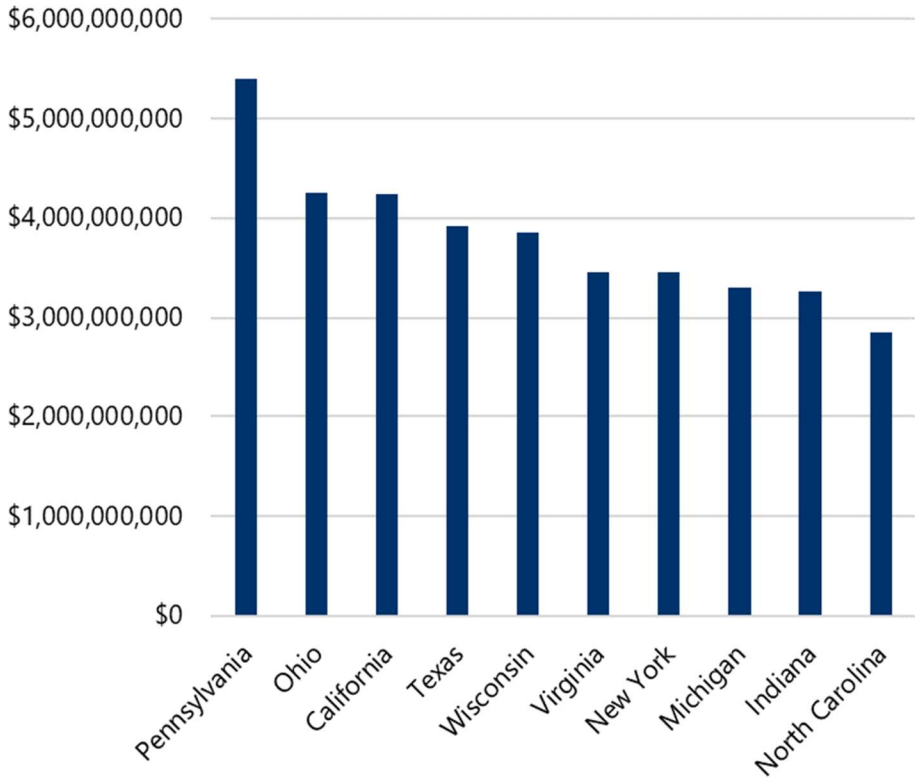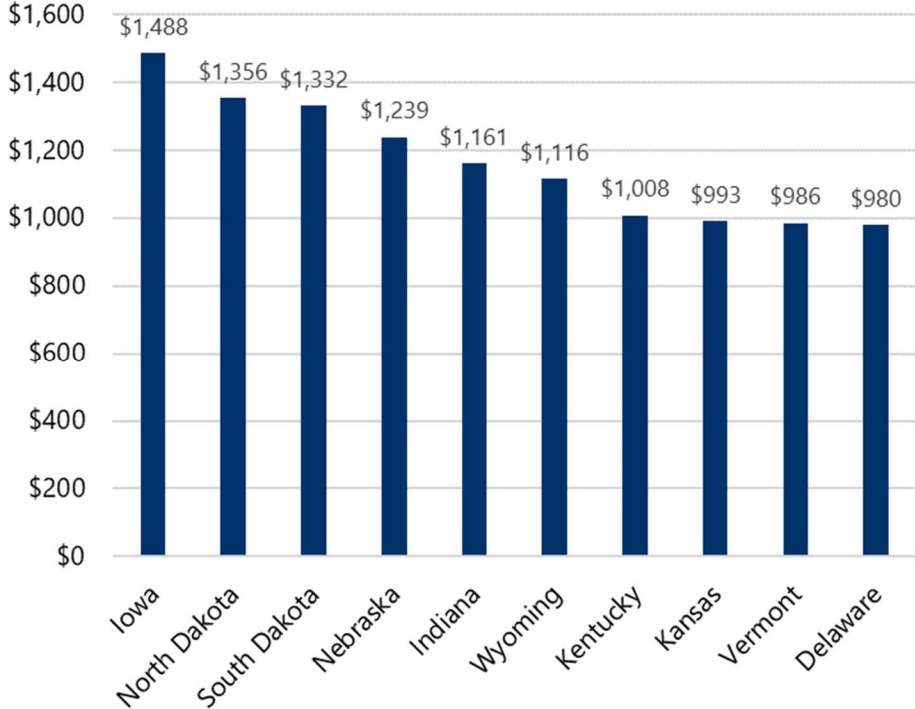
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states all import over $450 of Food and Beverage Wholesale goods and services per person annually. Iowa, South Dakota, and Nebraska had the most domestic imports per person for Food and Beverage Wholesale industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Food and Beverage Wholesale Industries.

Food and Beverage Wholesale Domestic Imports Per Population, 2022

Domestic Imports/Population

$453 $874
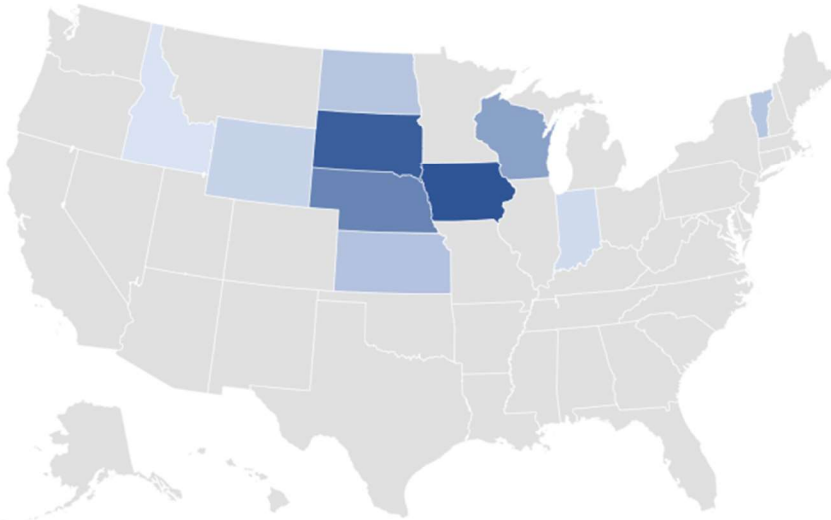
Powered by Bing
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Food and Beverage Wholesale Domestic Imports Per Population, 2022

Iowa $874, South Dakota $846, Nebraska $733, Wisconsin $650, Kansas $550, North Dakota $538, Vermont $537, Wyoming $500, Indiana $476, Idaho $453

Source: Lightcast

Forest and Forestry Products
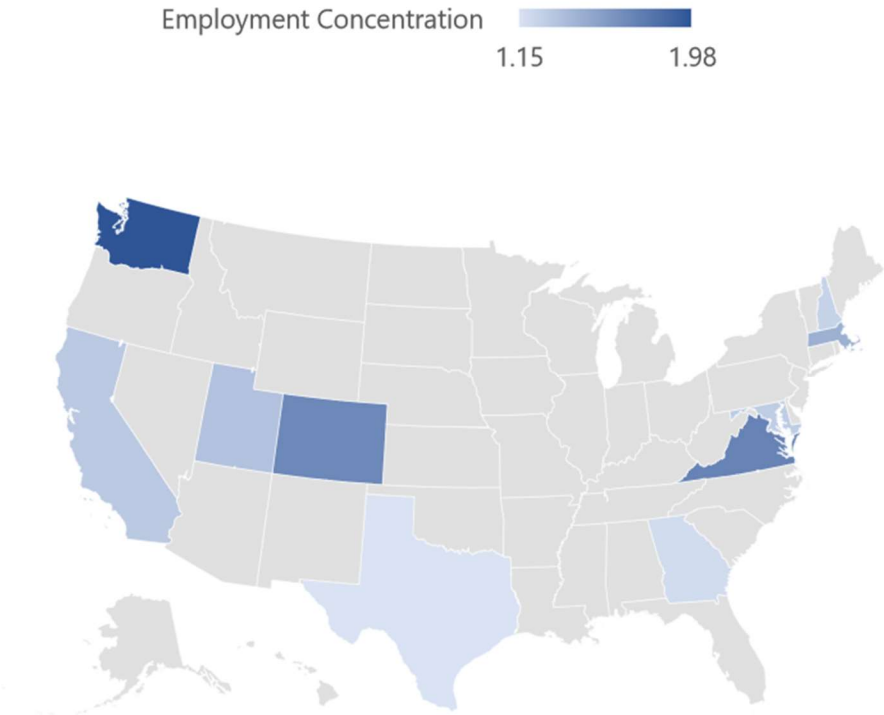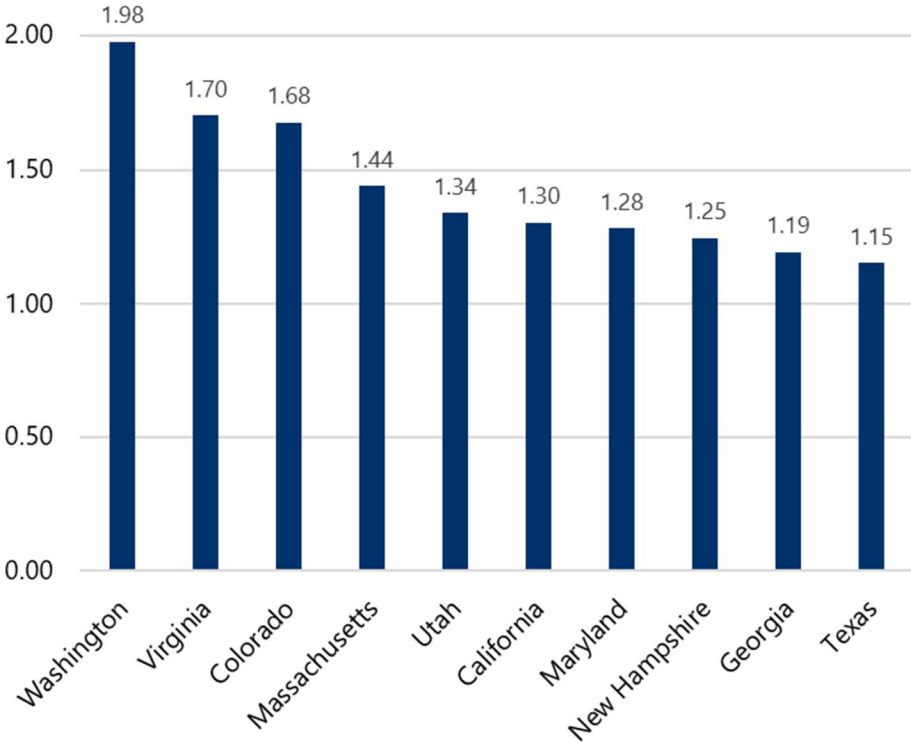
Employment Concentration

Ten states had an employment concentration greater than 1.57, meaning they were at least 57% more concentrated than the national average in Logistics, Transportation, and Warehousing industries. Oregon, Alabama, and Maine had the largest the largest employment concentration in Forestry and Forest Products industries in 2022. Maine had the third highest employment concentration in Forestry and Forest Product lindustries, with an employment concentration of 2.40.

Forestry and Forest Products Employment Concentration, 2022

Employment Concentration
1.58 2.75

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Forestry and Forest Products Employment Concentration, 2022

State	Value
Oregon	2.75
Alabama	2.48
Maine	2.40
Wisconsin	2.31
Arkansas	2.30
Idaho	1.95
Mississippi	1.95
Indiana	1.70
Vermont	1.65
Kentucky	1.58

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Forestry and Forest Products Industries greater than $7.8 billion. California, Texas, and New York had the most domestic imports for Forestry and Forest Products Industries in 2022. Maine was not among the top ten states in terms of domestic imports for Forestry and Forest Products Industries.

Forestry and Forest Products Domestic Imports, 2022
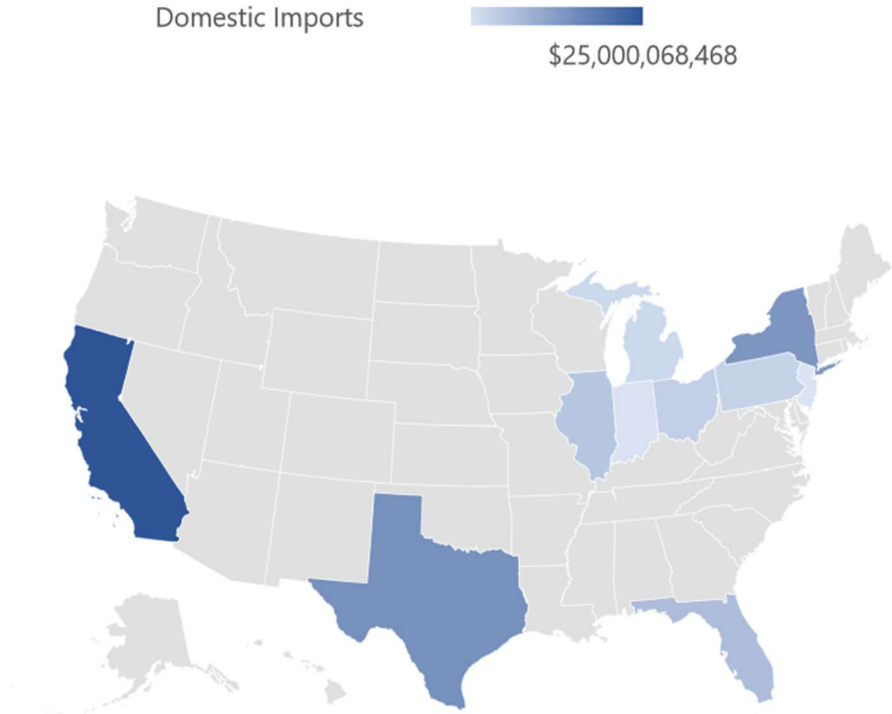
Domestic Imports

$25,000,068,468

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Forestry and Forest Products Domestic Imports, 2022
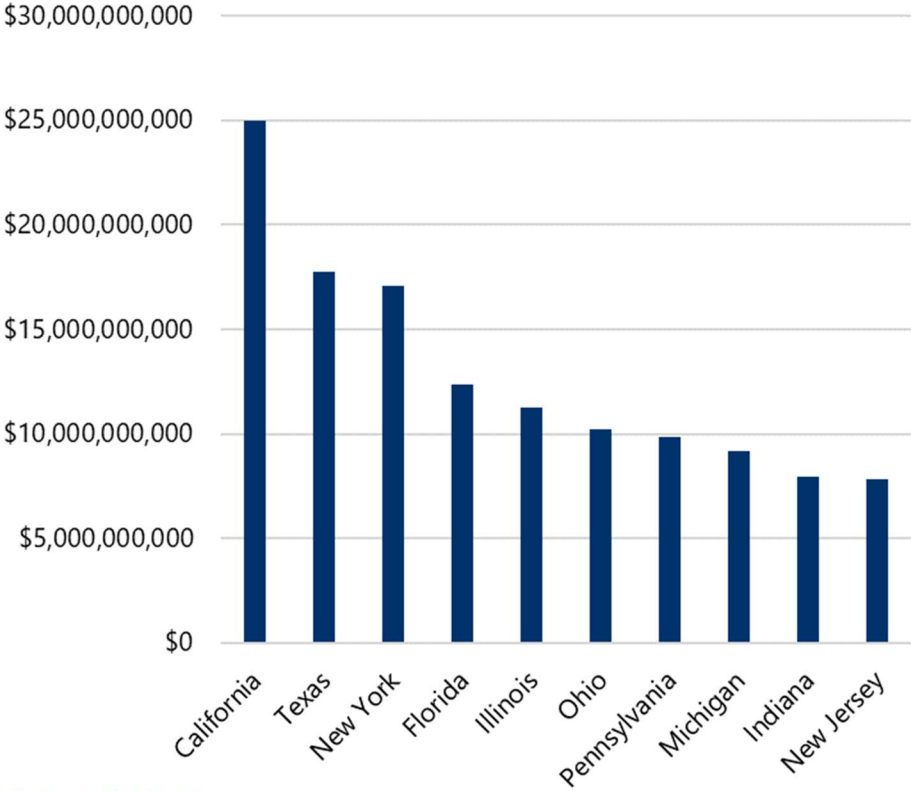
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $900 of Forestry and Forest Products goods and services per person annually. Iowa, North Dakota, and South Dakota had the most domestic imports per person for Forestry and Forest Products industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Forestry and Forest Products Industries.

Forest and Foresty Products Domestic Imports Per Population, 2022

Domestic Imports/Population

$980 — $1,488
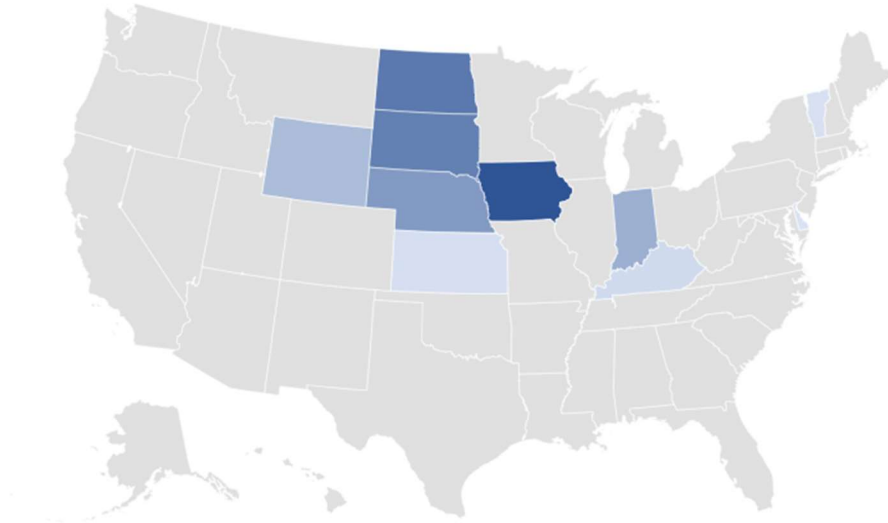
Powered by Bing
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Forestry and Forest Products Domestic Imports Per Population, 2022

State	Value
Iowa	$1,488
North Dakota	$1,356
South Dakota	$1,332
Nebraska	$1,239
Indiana	$1,161
Wyoming	$1,116
Kentucky	$1,008
Kansas	$993
Vermont	$986
Delaware	$980

Source: Lightcast

Information Technology

Employment Concentration

Ten states had an employment concentration greater than 1.18, meaning they were at least 18% more concentrated than the national average in Information Technology industries. Washington, Virginia, and Colorado had the largest the largest employment concentration in Information Technology industries in 2022. Maine was not among the top ten states in terms of employment concentration in Information Technology industries.
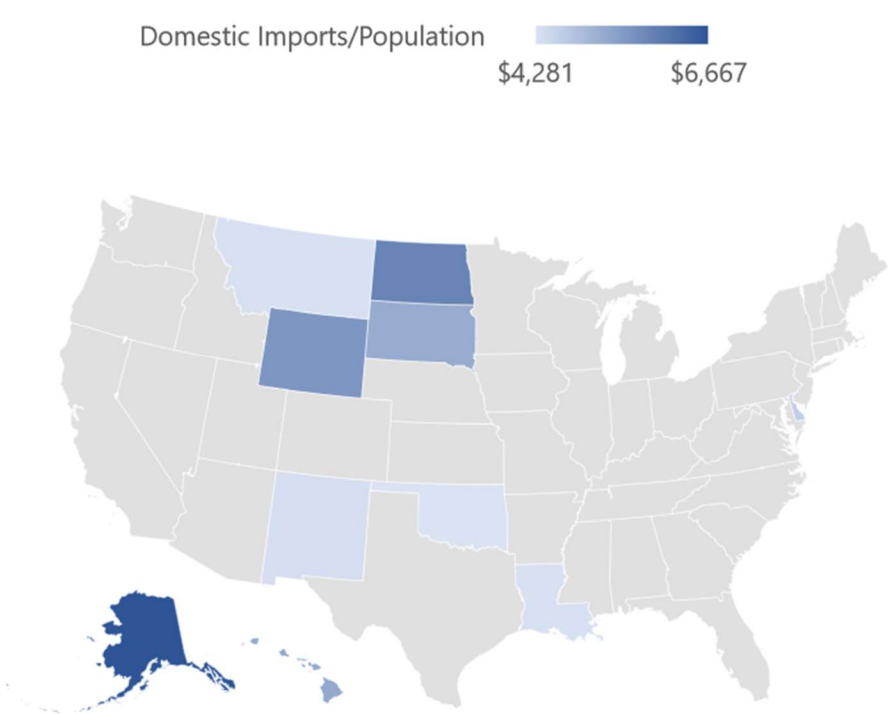

Information Technology Employment Concentration, 2022

Employment Concentration
1.15   1.98

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Information Technology Employment Concentration, 2022

State	Concentration
Washington	1.98
Virginia	1.70
Colorado	1.68
Massachusetts	1.44
Utah	1.34
California	1.30
Maryland	1.28
New Hampshire	1.25
Georgia	1.19
Texas	1.15

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Information Technology industries greater than $29 billion. Texas, Florida, and New York had the most domestic imports for Information Technology industries in 2022. Maine was not among the top ten states in terms of domestic imports for Information Technology industries.

Information Technology Domestic Imports, 2022

Domestic Imports

$57,188,561,510
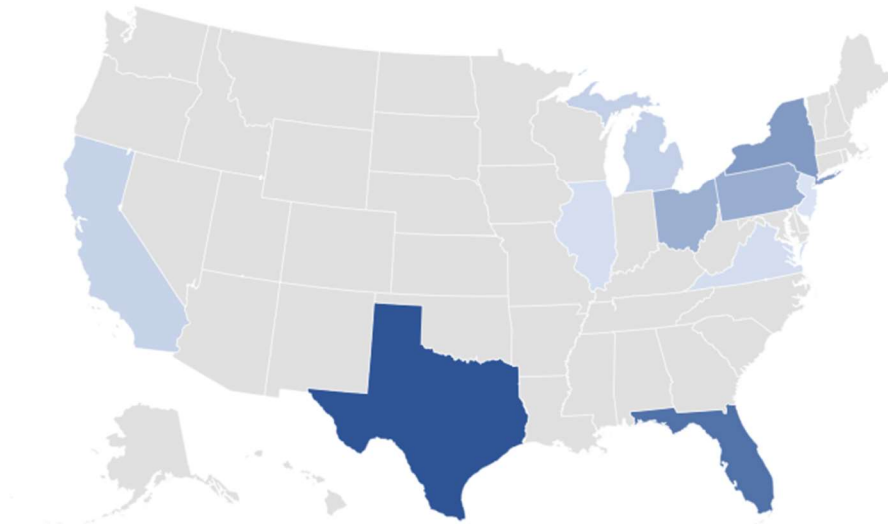
Information Technology Domestic Imports, 2022

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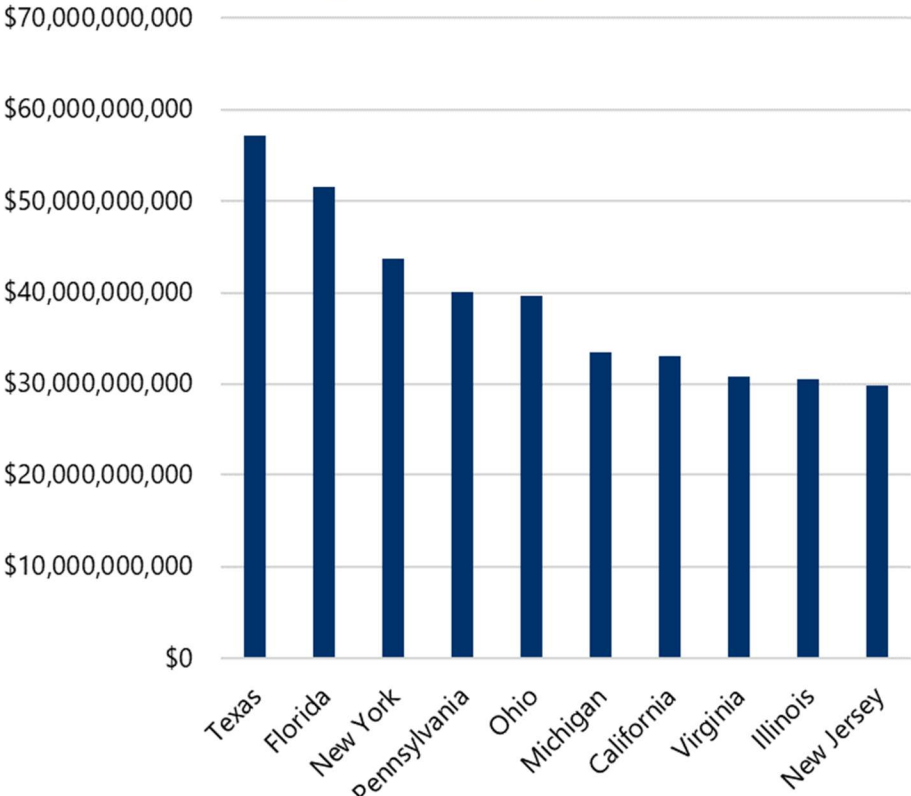
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states all import over $4,000 of Information Technology goods and services per person annually. Alaska, North Dakota, and Wyoming had the most domestic imports per person for Information Technology industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Information Technology industries.

Information Technology Domestic Imports Per Population, 2022

Domestic Imports/Population

$4,281 $6,667

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Information Technology Domestic Imports Per Population, 2022

State	Value
Alaska	$6,667
North Dakota	$5,861
Wyoming	$5,563
Hawaii	$5,255
South Dakota	$5,207
Delaware	$4,618
New Mexico	$4,339
Louisiana	$4,322
Montana	$4,311
Oklahoma	$4,281
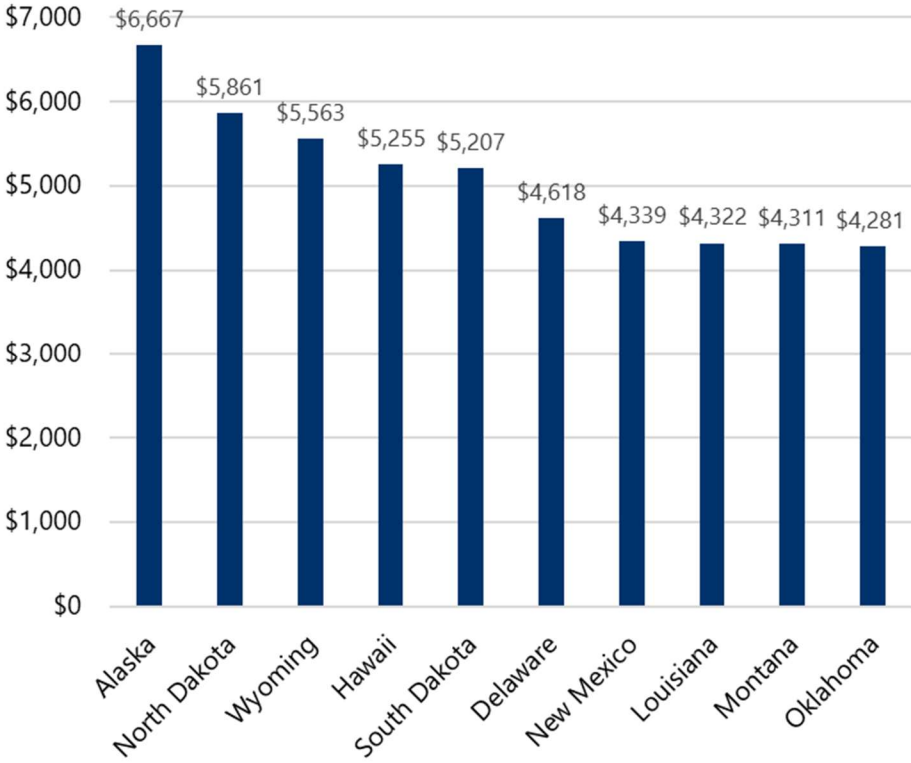
Source: Lightcast

Logistics, Transportation, and Warehousing

Employment Concentration

Ten states had an employment concentration greater than 1.20, meaning they were at least 20% more concentrated than the national average in Logistics, Transportation, and Warehousing industries. Nevada, New Jersey, and Alaska had the largest the largest employment concentration in Logistics, Transportation, and Warehousing industries in 2022. Maine was not among the top ten states in terms of employment concentration in Logistics, Transportation, and Warehousing industries.

Logistics, Transportation, and Warehousing Employment Concentration, 2022

Employment Concentration
1.21 — 1.48

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Logistics, Transportation, and Warehousing Employment Concentration, 2022

State	Value
Nevada	1.48
New Jersey	1.36
Alaska	1.30
Georgia	1.30
Illinois	1.29
Tennessee	1.29
Kentucky	1.27
Arkansas	1.27
Indiana	1.26
Nebraska	1.21

Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Logistics, Transportation, and Warehousing industries greater than $14 billion. New York, California, and Texas had the most domestic imports for Logistics, Transportation, and Warehousing industries in 2022. Maine was not among the top ten states in terms of domestic imports for Logistics, Transportation, and Warehousing industries.

Logistics, Transportation, and Warehousing Domestic Imports, 2022

Domestic Imports

$39,016,985,092
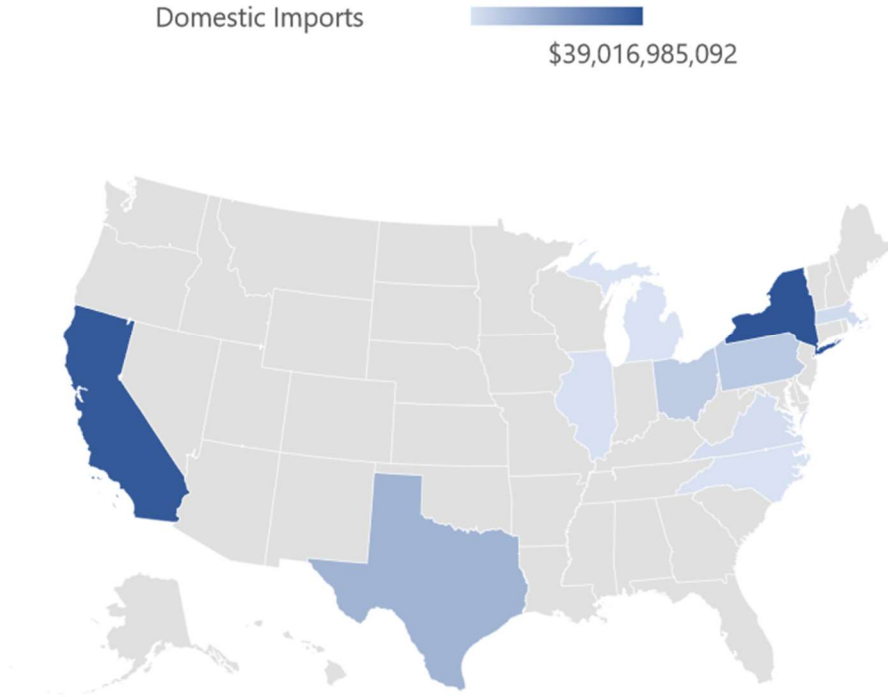
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Logistics, Transportation, and Warehousing Domestic Imports, 2022

Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states all import over $2,000 of Logistics, Transportation, and Warehousing goods and services per person annually. Wyoming, South Dakota, and North Dakota had the most domestic imports per person for Logistics, Transportation, and Warehousing industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Logistics, Transportation, and Warehousing industries.

Logistics, Transportation, and Warehousing Domestic Imports Per Population, 2022

Domestic Imports/Population
$2,294 $3,110
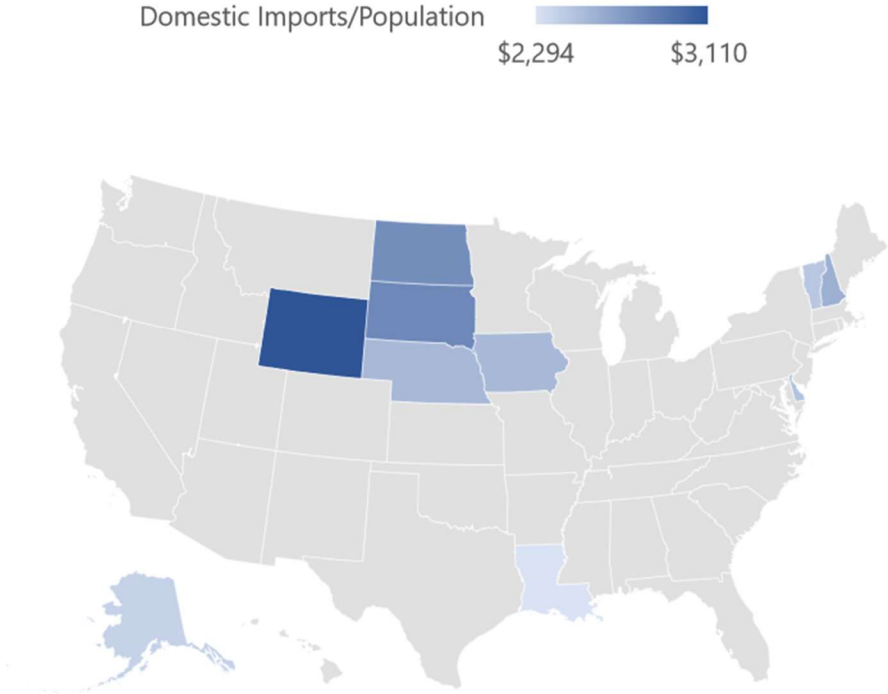
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Logistics, Transportation, and Warehousing Domestic Imports Per Population, 2022
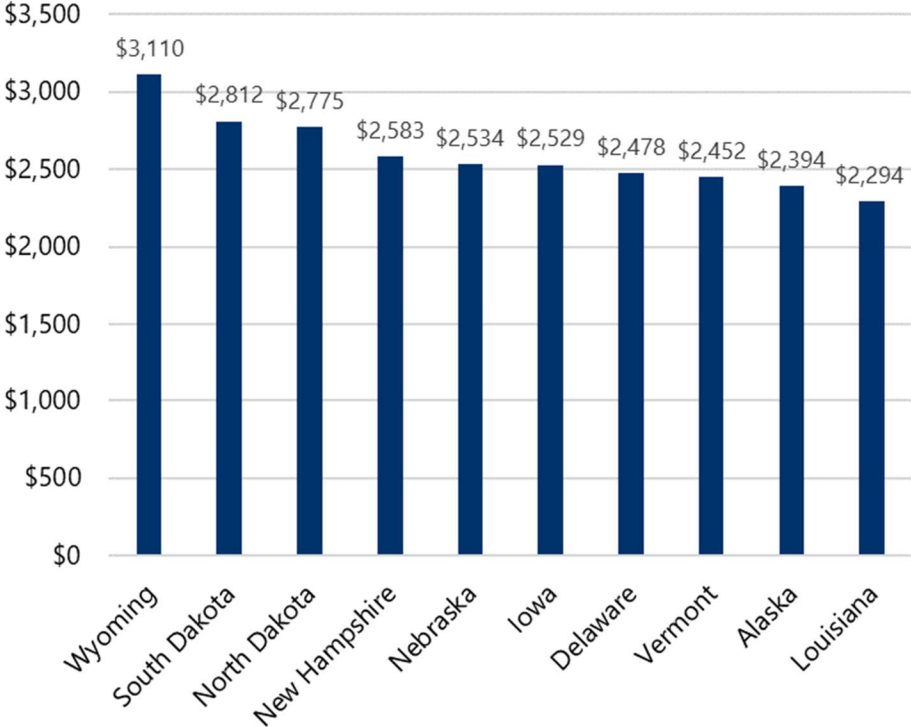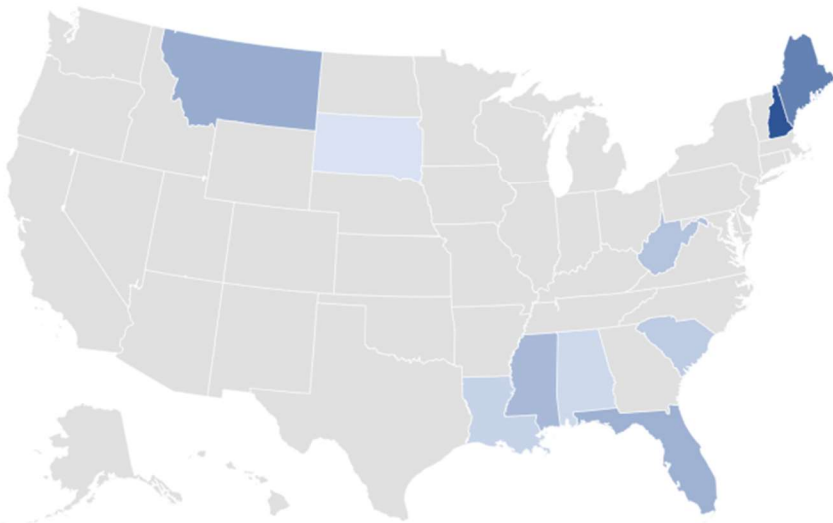
Source: Lightcast

Retail

Employment Concentration

Ten states had an employment concentration greater than 1.09, meaning they were at least 9% more concentrated than the national average in Retail Trade industries. New Hampshire, Maine, and Montana had the largest the largest employment concentration in Retail Trade industries in 2022. Maine had the second highest employment concentration in Retail Trade Industries, with an employment concentration of 1.22.
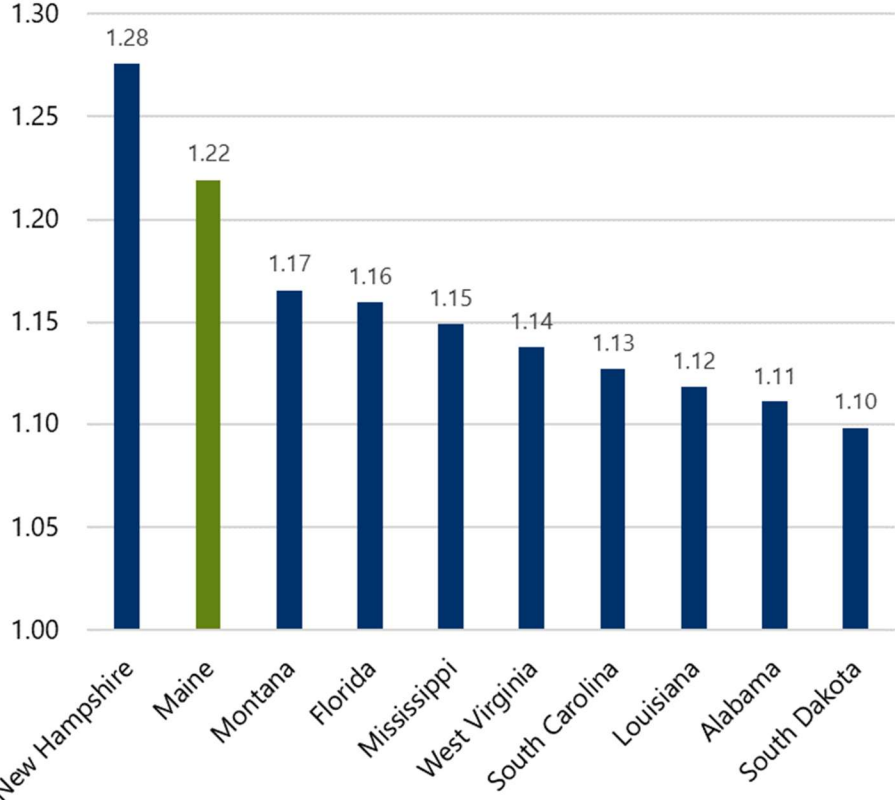

Retail Trade Employment Concentration, 2022

Employment Concentration

1.10 — 1.28

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Retail Trade Employment Concentration, 2022

New Hampshire 1.28, Maine 1.22, Montana 1.17, Florida 1.16, Mississippi 1.15, West Virginia 1.14, South Carolina 1.13, Louisiana 1.12, Alabama 1.11, South Dakota 1.10
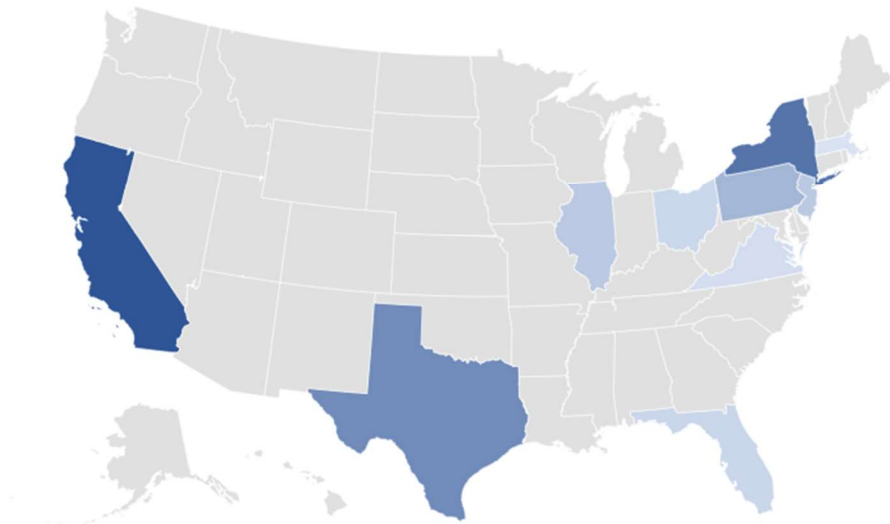
Source: Lightcast

Domestic Imports

The top ten states below had domestic imports for Retail Trade Industries greater than $31 billion. California, New York, and Texas had the most domestic imports for Retail Trade Industries in 2022. Maine was not among the top ten states in terms of domestic imports for Retail Trade Industries in 2022.
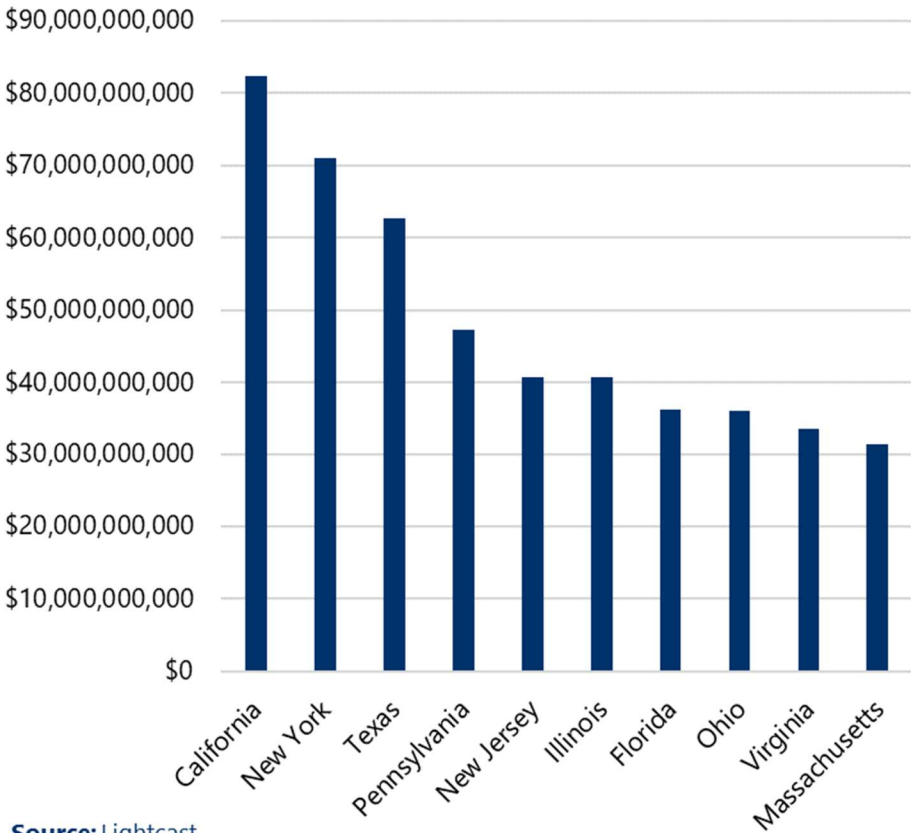

Retail Trade Domestic Imports, 2022

Domestic Imports

$82,371,026,178

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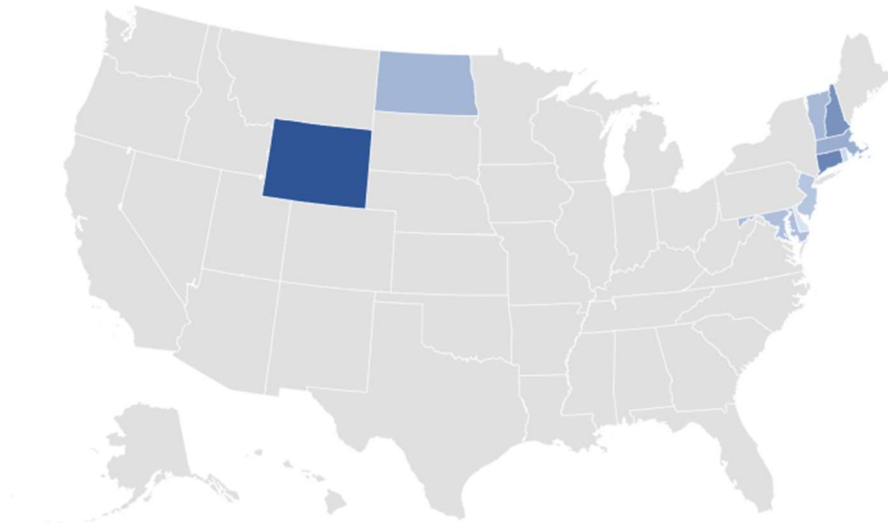**Retail Trade Domestic Imports, 2022**
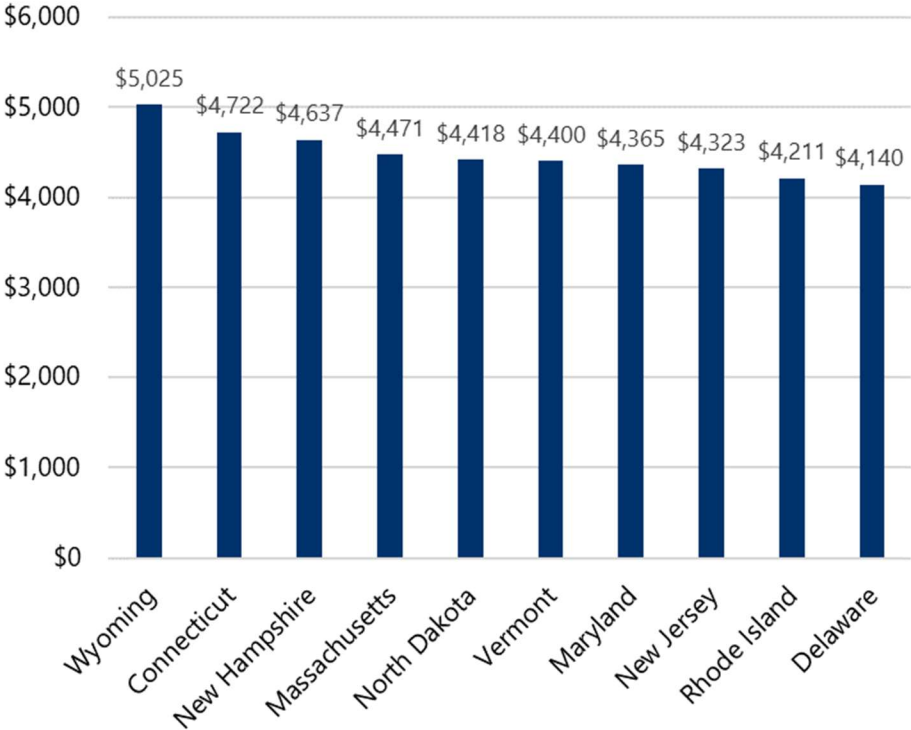
Source: Lightcast

Domestic Imports Per Population

When controlling population size, the top ten states below all import over $4,000 of Retail goods and services per person annually. Wyoming, Connecticut, and New Hampshire had the most domestic imports per person for Retail industries in 2022. Maine was not among the top ten states in terms of domestic imports per person for Retail Industries.

Retail of Domestic Imports Per Population, 2022

Domestic Imports/Population

$4,140 $5,025

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Retail Dollar of Domestic Imports Per Population, 2022

State	Value
Wyoming	$5,025
Connecticut	$4,722
New Hampshire	$4,637
Massachusetts	$4,471
North Dakota	$4,418
Vermont	$4,400
Maryland	$4,365
New Jersey	$4,323
Rhode Island	$4,211
Delaware	$4,140

Source: Lightcast

ATTACHMENT 1: 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.

Esri ArcGIS Business Analyst combines proprietary statistical models covering demographic, business, and spending data with map-based analytics to offer insights on market opportunities for industries, businesses, and sites. Business Analyst integrates datasets covering a wide range of topics including demographics, consumer spending, market potential, customer segmentation, business locations, traffic counts, and crime indexes, which can be overlaid spatially to produce customizable maps and uncover market intelligence. Data can be pulled for standard and custom geographies, allowing for valuable comparison between places. 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 1st of the Census year. The Constitution mandates the enumeration 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 quarters population. Click to learn more.

The **Local Area Unemployment Statistics** (LAUS) program estimates total employment and unemployment for approximately 7,500 geographic areas on a monthly basis, from the national level down to the city and town level. LAUS data is offered through the US Bureau of Labor Statistics (BLS) by combining data from the Current Population Survey (CPS), Current Employment Statistics (CES) survey, and state unemployment (UI) systems. Click to learn more.

The Bureau of Economic Analysis (BEA) prepares national, regional, industry, and international accounts that present essential information on such key issues as economic growth, regional economic development, interindustry relationships, and the nation's position in the world economy. Click to learn more.

Population Estimates Program | US Census Bureau

The Census Bureau's **Population Estimates Program** (PEP) produces estimates of the population for the US and its states, counties, cities, and towns. Demographic components of population change—births, deaths, and migration—are produced at the national, state, and county levels. PEP provides population estimates on an annual basis. Click to learn more.

Freight Analysis Framework Version 5

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 **Bureau of Transportation Statistics (BTS)** with support from the **Federal Highway Administration (FHWA)**. Click to learn more.

ABOUT CAMOIN ASSOCIATES

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

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

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

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Jim Damicis
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Tori McNiff
Project Manager

Angela Hallowell
Analyst

Connor Allen
Analyst

Service Lines

Strategic and Organizational Planning

Real Estate Development Services

Lead Generation and Relationships

Business Attraction and Retention
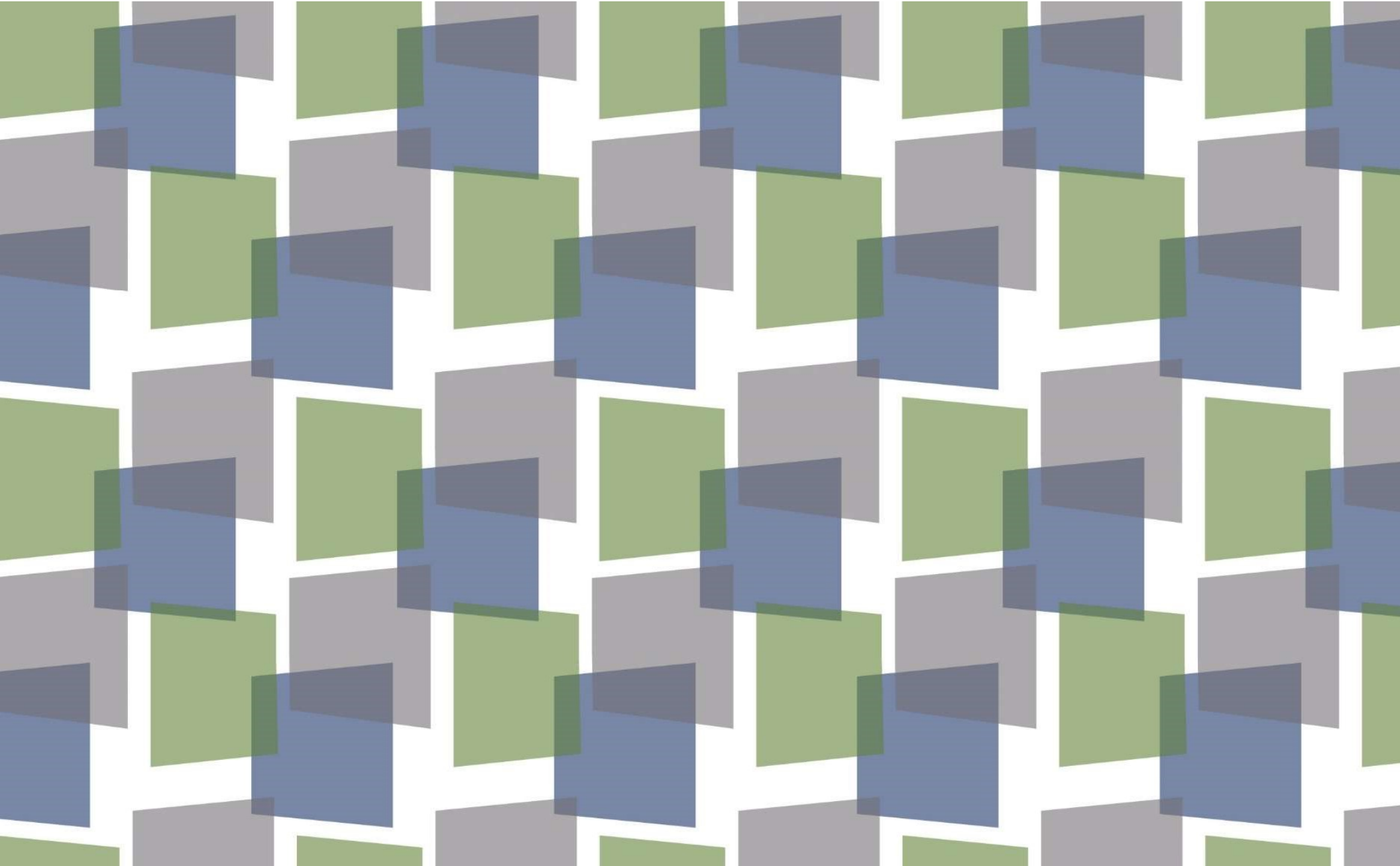
Entrepreneurship and Innovation

Industry and Workforce Analytics

Impact Analysis