

# Logistics, Transportation, and Warehousing: Industry Profile

JULY 2023

State of Maine - DECD



**Department of Economic  
& Community Development**

# PROJECT OVERVIEW

## Report Purpose

This document provides an in-depth analysis of the Transportation, Warehousing and Logistics sector in Maine, including its domestic trade activity.

Industry classification ranges from 2-digit industries (most broad) to 6-digit industries (most specific) under the North American Industry Classification System (NAICS). This report focuses on the 3- to 6-digit industry level to give more detailed analysis of Maine's domestic trade activity in the Transportation, Warehousing and Logistics sector.

Data about transportation in this report may differ from reporting completed by the Maine Department of Transportation. For instance, Transportation manufacturing is not included in this report, but rather the **service of transportation**. As a result, any manufacturing that occurs for Transportation, Warehousing, and Logistics outside of the US is not included in this report, with all industries being self-contained within the US. As a result, foreign imports or exports are not evaluated. For details about all industries that are included in this analysis, please see the Appendix.

## Project Funding

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

## Data

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

## Consultant Team



Jim Damicis, Senior Vice President  
Project Principal

Jessica Tagliaferro, Director of Impact Analysis  
Senior Analyst

Tori McNiff  
Project Manager

Angela Hallowell  
Project Analyst

Connor Allen  
Project Analyst

# KEY FINDINGS

## Transportation, Warehousing, and Logistics Sector

The sector is a critical part of business and civic infrastructure. It serves multiple industries and related supply chains. **Jobs have fallen over the last five years since 2017. These industries have been slow to recover in Maine at a time where the sector is rapidly growing nationwide.** The state has lost 1,579 Transportation, Warehousing, and Logistics jobs since 2017. This is a decrease of 9% over five years, while at the same time, the sector's growth rate has been nearly double this (+17%) nationwide.

**Industry concentration is below the US average.** In 2022, this concentration is 0.60. During the Transportation, Warehousing, and Logistics boom, large industry players (e.g., Amazon) are investing in key hubs in the Mid-Atlantic, Texas, and other regions.

**Transportation, Warehousing, and Logistics has room to improve to meet demand in-state.** In 2022, 58% of total demand for the Transportation, Warehousing, and Logistics Sector is met by out-of-state sources. This ranks Maine 42<sup>nd</sup> in the nation for in-region demand, which indicates that it could negatively impact the B2B sales environment.

**Waterborne transportation activity, both passenger and freight, are opportunities for Maine.** The *Scenic and Sightseeing Transportation, Water* subsector are the largest industry concentration. This industry has job concentrations that are more than four times the national average and is also growing. Water Transportation (freight) is an area of strength for the State. As Maine's exports across industries develop potential to grow, the Atlantic coast will be a key route for getting goods to market.

## Subsectors included in this report

- **Transportation** – activity includes industries providing transportation of passengers and cargo, and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.
- **Warehousing & Storage** – these are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods. They do not sell the goods they handle. These establishments take responsibility for storing the goods and keeping them secure. They may also provide a range of services, often referred to as logistics services, related to the distribution of goods.
- **Process, Physical Distribution, and Logistics Consulting Services** – these are engaged in providing operating advice and assistance to businesses and other organizations in manufacturing operations, productivity improvement, production planning and control, quality assurance and quality control, inventory management, distribution networks, warehouse use, operations, and utilization, transportation and shipment of goods and materials, and materials management and handling.
- **Packaging and Labeling Services** – activity is primarily engaged in packaging client-owned materials. The services may include labeling and/or imprinting the package.

# NATIONAL TRENDS

## KEY TRENDS

- Post-pandemic travel surge spurred significant spending on leisure travel, but increasing costs are starting to curb demand.
- Air travel is seeing robust revenue growth amidst high demand. Managing demand with recent labor shortages created issues with booking and logistics, but it has yet to lessen customer interest.
- The pandemic drove demand across the US for more warehousing and logistics facilities due to a larger share of goods that were moved through domestic facilities.
- Accelerated growth in E-commerce has kept volumes of packages, mailings and demand for courier services high.

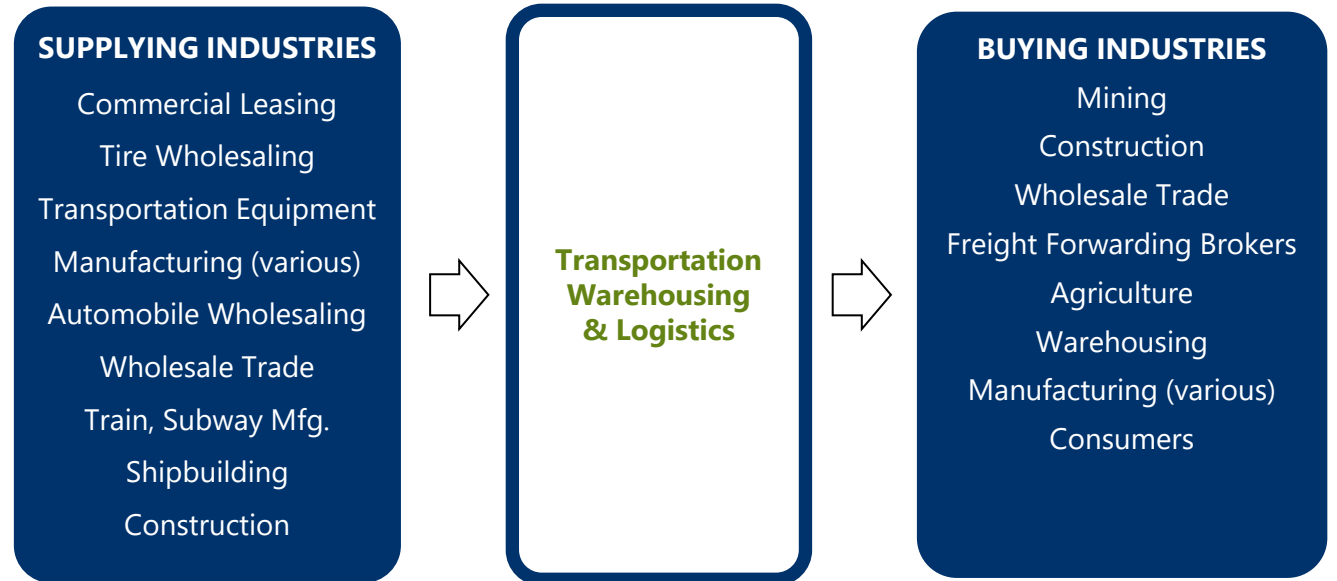
## RECENT DEVELOPMENTS

- Energy prices are stabilizing after shocks from the pandemic and international instability. Middle East production cuts in early 2023 threaten to add more volatility.
- Rail freight is starting to see profitable gains as intermodal service has grown and digital logistics have improved efficiency. However, losses in coal volumes and increased costs from attention on safety threaten future growth.
- Slowing consumer spending could be a drag on E-commerce, package services, and intermodal activity.

## INDUSTRY DRIVERS

- Total trade value
- Consumer spending
- Freight transportation services index
- World price of crude oil
- Industrial production index

## SUPPLY CHAIN



Source: IBISWorld

## DATA NOTE:

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

# NATIONAL TRENDS



**Jobs (2022)**  
6.1 Million



**Job Growth**  
2017-2022: 17%  
2022-2027 Projected: 9%



**Establishments (2022)**  
298,724



**Avg. Earnings (2022)**  
\$75,280

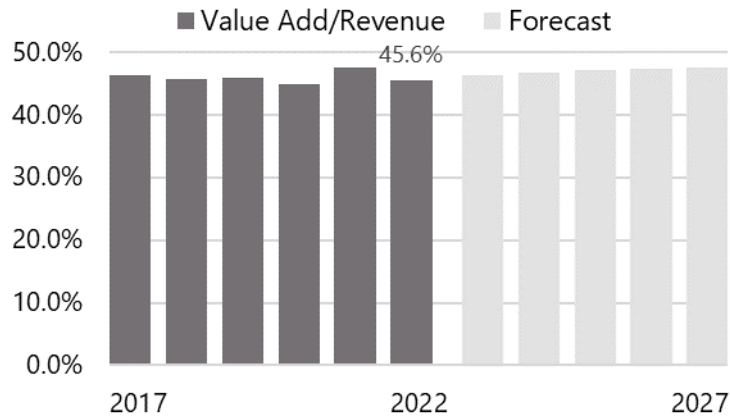


**Domestic Demand (2022)**  
\$1.3 Trillion



**Top Partners (2022)**  
No international trade partners

The **value-add-to-revenue ratio** was 45.6% in 2022. This indicator shows how much value the production process adds to products relative to the overall size of the sector.



Source: IBISWorld

## Transportation, Warehousing, and Logistics Considered Domestic Trade

- For this sector, the types of transportation, freight and warehousing services are **transacted with a point of sale within the U.S.**, often with a domestic intermediary for international purchasers. This makes it so none of the activity is counted as foreign trade.
- **Therefore, the imports share of domestic demand was 0%** in 2022. This demonstrates how much of demand for the sector's products in the US are met by imports.
- **And the exports share of revenue was 0%** in 2022. This indicator shows the relative importance of exports to the sector's overall revenue strength.

# SECTOR SUMMARY IN MAINE

## Transportation, Warehousing, and Logistics Summary

### Jobs: 15,967

- Data for 2022
- 2.2% of the state's total employment

### Concentration: 0.60

- Data for 2022
- Maine has an 40% lower jobs concentration than the national average

### Competitive Effect: -5,707

- Data compares 2017-2022
- Local Advantages contribute substantially more jobs than expected given industry trends and national growth

### Total Sales: \$3.2 Billion

- Data for 2022
- 39% of sales exported out of state
- Accounts for 1.9% of All Maine sales, underperforming the U.S. (3.0% of total sales)

Source: Lightcast

### Job Growth: -1,579

- Data compares 2017-2022
- The sectors job loss was in contradiction of the statewide gain of +2%

### Establishments: 1,427

- Data for 2022
- The average firm size of 11.1 jobs makes it lower than US average for the sector 20.6

### Gross Regional Product: \$1.5 Billion

- Data for 2022
- 5.9% of Maine's total GRP (greater than U.S. where this sector only makes up 4.7% of the total)

### Demand: \$4.6 Billion

- Data for 2022
- 42% of the demand for the sector is met in-region, the remaining 58% is imported

### Job Growth Rate: -9%

- Data compares 2017-2022
- Sector growth in Maine is lower than the U.S. (+17%)

### Average Earnings: \$69,562

- Data for 2022
- Higher than the State's Average earnings for all sectors (\$66,730) but lower than the U.S. rate for this sector (\$75,280)

### Productivity: \$93,360

- Data for 2022
- Lags the U.S. rate of \$215,903 GRP per worker

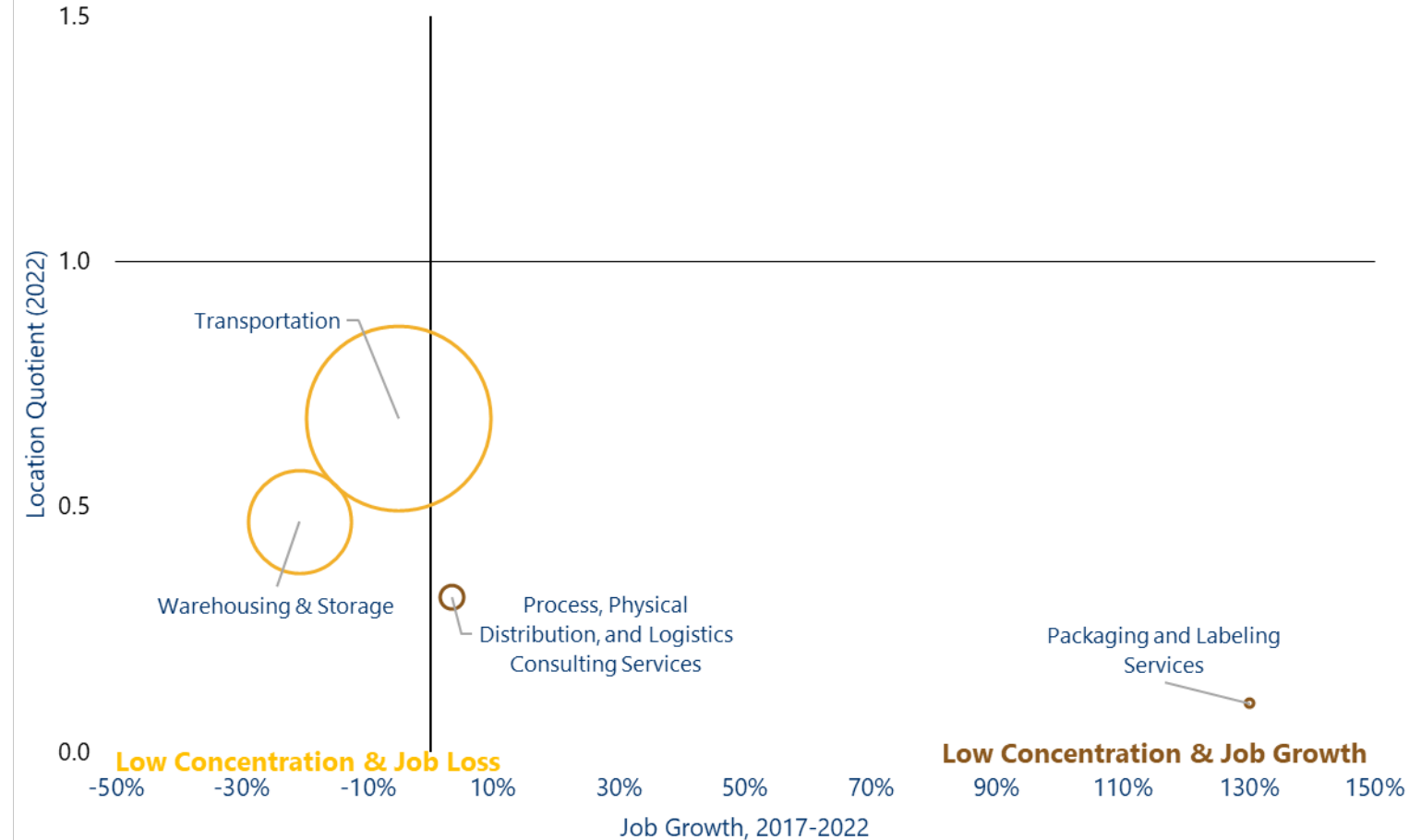
### Leakage: \$2.6 Billion

- Data for 2022
- An estimates \$2.6 billion could be recaptured by Maine firms

# KEY SUBSECTORS

## High Concentration & Job Loss

## High Concentration & Job Growth



## Findings:

- The entire sector of Transportation, Warehousing, and Logistics is underrepresented in Maine. The location quotient of 0.60 for the sector means that there is 40% fewer jobs for this type of activity compared with the national average.
- The Transportation subsector is the largest group with 12,003 jobs in 2022. It still has a location quotient well below the US average (0.68 vs 1.00) and lost 627 jobs since 2017. There is a lot of variation in the performance of industries within the Transportation subsector. These differences will be explored in more detail in the next section.
- Warehousing and Storage has seen strong growth at the national level that has not translated to job increases in Maine. A location quotient less than half the national average (0.47) indicates negative factors preventing additional growth in Maine for this type of activity. Since 2017 Warehousing and Storage has the most jobs lost within Transportation, Warehousing, and Logistics: -975 jobs or -21%.
- A key professional service supporting Transportation, Warehousing, and Logistics, Process, Physical Distribution, and Logistics Consulting Services is a complementary activity for any major logistics hub. Maine only has 207 of these types of jobs, but at least it's moving in the right direction with +3% growth since 2017.
- The Packaging and Labeling Services subsector has more than doubled in size since 2017. Going from 12 to 28 jobs in 2022. It has a location quotient of 0.10 which is one-tenth of the US average.

Bubble size = 2022 jobs

Source: Lightcast, Camoin Associates

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

# KEY INDUSTRY PERFORMANCE

## Key Industry Groups: Summary

Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022
Transportation	12,630	12,003	(627)	- 5%	\$70,725	0.68	(737)	1,239
Warehousing & Storage	4,705	3,729	(975)	- 21%	\$64,903	0.47	(4,942)	73
Process, Physical Distribution, and Logistics Consulting Services	200	207	7	+3%	\$90,095	0.32	(43)	109
Packaging and Labeling Services	12	28	16	+130%	\$39,652	0.10	14	7
<b>Total for Maine</b>	<b>17,546</b>	<b>15,967</b>	<b>-1,579</b>	<b>- 9%</b>	<b>\$69,562</b>	<b>0.60</b>	<b>-5,707</b>	<b>1,427</b>
<b>Total for United States</b>	<b>5,258,280</b>	<b>6,151,408</b>	<b>893,127</b>	<b>+17%</b>	<b>\$75,280</b>	<b>-</b>	<b>0.00</b>	<b>298,724</b>

Source: Lightcast

## Continued: Key Industry Groups

Description	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
Transportation	\$3,581,652,768	\$2,057,132,342	\$2,674,772,415	\$1,201,364,002	\$100,089
Warehousing & Storage	\$867,404,417	\$493,980,166	\$488,518,873	\$264,190,554	\$70,839
Process, Physical Distribution, and Logistics Consulting Services	\$75,403,352	\$44,781,584	\$38,955,693	\$23,814,248	\$115,091
Packaging and Labeling Services	\$37,069,992	\$34,212,436	\$3,014,516	\$1,345,249	\$48,045
<b>Total for Maine</b>	<b>\$4,561,530,529</b>	<b>\$2,630,106,528</b>	<b>\$3,205,261,497</b>	<b>\$1,490,714,053</b>	<b>\$93,360</b>
<b>Total for United States</b>	<b>\$1,314,220,023,160</b>	<b>-</b>	<b>\$1,456,261,426,770</b>	<b>\$1,328,110,348,750</b>	<b>\$215,903</b>

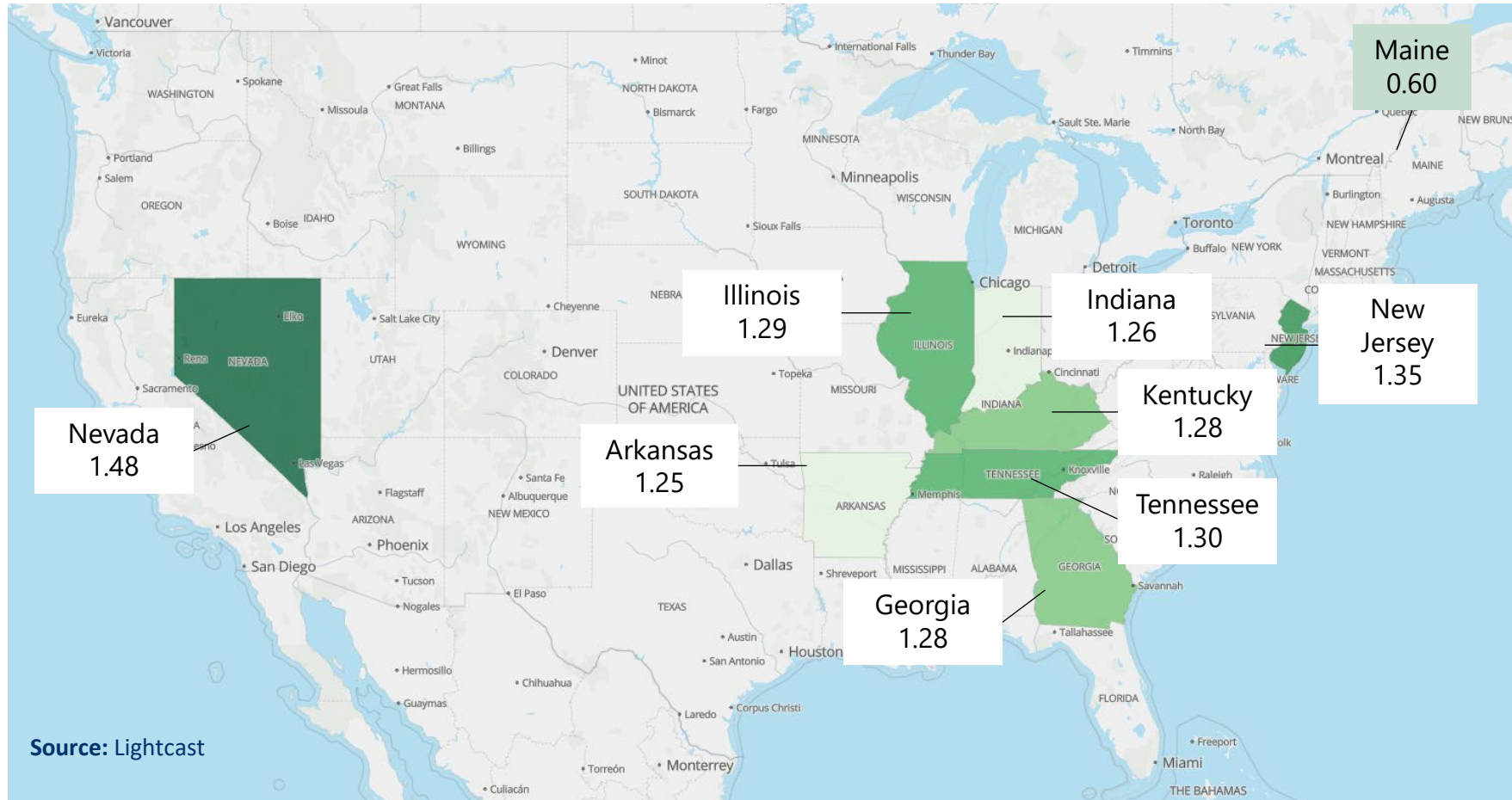
Source: Lightcast

- **Transportation has the highest location quotient** of the subsectors at 0.68. Job loss of 5% compared to 2017 means Transportation is less concentrated and retracting. The negative competitive effect of -737 relates that the same activity is growing more quickly at the national level than it is in Maine.
- **Transportation is the largest subsector** with 12,003 jobs in 2022. The Transportation sector's different types of activity (Freight, Trucking, Air, Rail) all rely on transportation specialists. Individual transporters may specialize in residential versus commercial (as an example), but the intermediary arrangement where transportation companies hire outside transportation specialists ensures that Transportation jobs will always be the largest component of the sector.
- Maine does not have concentrations in Transportation, Warehousing, and Logistics, the overall sector is also **shrinking faster** (-9% vs +17%) than the national average. Maine Transportation, Warehousing, and Logistics **workers earn less** (\$69,562 per year vs \$75,280) than the average US worker and are **less productive** (\$93,360 GRP/Job vs \$215,903).



# KEY NATIONAL PLAYERS

States with >1.25 Location Quotient for the Transportation, Warehousing, and Logistics Sector (2022)



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

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# Industry Demand and Purchases

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Where is Maine's Transportation,  
Warehousing, and Logistics Sector buying  
from?

# PURCHASING INDUSTRIES

## Industries Maine Purchases From

### Top 25 Sectors the Transportation, Warehousing, and Logistics Industry Purchases From (2022)

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
492110	Couriers and Express Delivery Services	\$67,124,066	71.4%	\$26,897,054	28.6%	\$94,021,120
561320	Temporary Help Services	\$57,200,296	88.1%	\$7,750,650	11.9%	\$64,950,946
551114	Corporate, Subsidiary, and Regional Managing Offices	\$54,825,994	72.5%	\$20,748,748	27.5%	\$75,574,742
493110	General Warehousing and Storage	\$51,396,046	52.5%	\$46,416,545	47.5%	\$97,812,591
901149	US Postal Service	\$31,205,747	100.0%	\$5,668	0.0%	\$31,211,415
447110	Gasoline Stations with Convenience Stores	\$30,091,529	91.3%	\$2,882,090	8.7%	\$32,973,619
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$23,365,449	71.2%	\$9,448,021	28.8%	\$32,813,470
531110	Lessors of Residential Buildings and Dwellings	\$20,612,421	88.3%	\$2,728,391	11.7%	\$23,340,812
221122	Electric Power Distribution	\$18,654,157	92.0%	\$1,621,802	8.0%	\$20,275,959
488510	Freight Transportation Arrangement	\$17,561,326	26.2%	\$49,509,834	73.8%	\$67,071,159
517311	Wired Telecommunications Carriers	\$17,090,285	81.3%	\$3,940,456	18.7%	\$21,030,741
488190	Other Support Activities for Air Transportation	\$15,957,773	59.2%	\$11,007,210	40.8%	\$26,964,983
811111	General Automotive Repair	\$15,594,989	99.1%	\$141,408	0.9%	\$15,736,398
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	\$15,202,214	93.6%	\$1,035,646	6.4%	\$16,237,860
531210	Offices of Real Estate Agents and Brokers	\$13,536,544	70.0%	\$5,803,313	30.0%	\$19,339,857
424710	Petroleum Bulk Stations and Terminals	\$13,275,602	88.6%	\$1,706,478	11.4%	\$14,982,079
522110	Commercial Banking	\$13,068,147	36.8%	\$22,404,011	63.2%	\$35,472,157
524210	Insurance Agencies and Brokerages	\$11,529,508	96.1%	\$472,626	3.9%	\$12,002,134
484121	General Freight Trucking, Long-Distance, Truckload	\$11,489,100	76.8%	\$3,473,333	23.2%	\$14,962,432
482110	Rail transportation	\$10,194,214	64.4%	\$5,623,793	35.6%	\$15,818,008
524126	Direct Property and Casualty Insurance Carriers	\$10,172,102	55.7%	\$8,086,023	44.3%	\$18,258,125
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	\$8,884,543	53.2%	\$7,805,707	46.8%	\$16,690,250
531390	Other Activities Related to Real Estate	\$8,509,493	59.9%	\$5,706,804	40.1%	\$14,216,297
811121	Automotive Body, Paint, and Interior Repair and Maintenance	\$8,495,261	91.1%	\$831,460	8.9%	\$9,326,721
488119	Other Airport Operations	\$8,307,506	72.9%	\$3,080,514	27.1%	\$11,388,020

Source: Lightcast

- The top 25 industries that the Transportation, Warehousing, and Logistics Sector purchases from represent 55% of total demand. This indicates that **Transportation, Warehousing, and Trade's purchases are largely captured in these top industries.**
- There are subsectors from within the Transportation, Warehousing, and Logistics sector that are top sources for purchases of the Transportation, Warehousing, and Logistics sector itself.** Seven different subsectors supply nearly \$350 million in purchases to this sector (and are within this sector) which makes up 21% of total purchases.
- Energy and fuel are key inputs to this sector.** Petroleum Refineries are the third largest category of purchases and are 100% imported from outside of Maine. Wholesale petroleum products is the 9<sup>th</sup> largest purchase category. Electric Power Distribution is in the top 25 as well.
- The Transportation, Warehousing, and Logistics sector uses a lot of land.** Besides leasing of industrial machinery, there are four subsectors in the top 25 related to real estate. These activities deal with handling and moving large volumes of goods and/or facilities for large transportation infrastructure systems to move people and goods. These are significantly horizontal operations that require specialized management of real property assets.

**DATA NOTE:** This table gives greater insight into supply chain gaps within the Transportation, Warehousing, and Logistics Sector. Industries that have low shares of in-region purchases indicate opportunities where Maine relies heavily on imported supply, but where Maine businesses could potentially expand to recapture transactions. The figure above is sorted by total purchases. Transportation, Warehousing, and Logistics subsectors are in bold in the table above.

# DEMAND COMPARISON

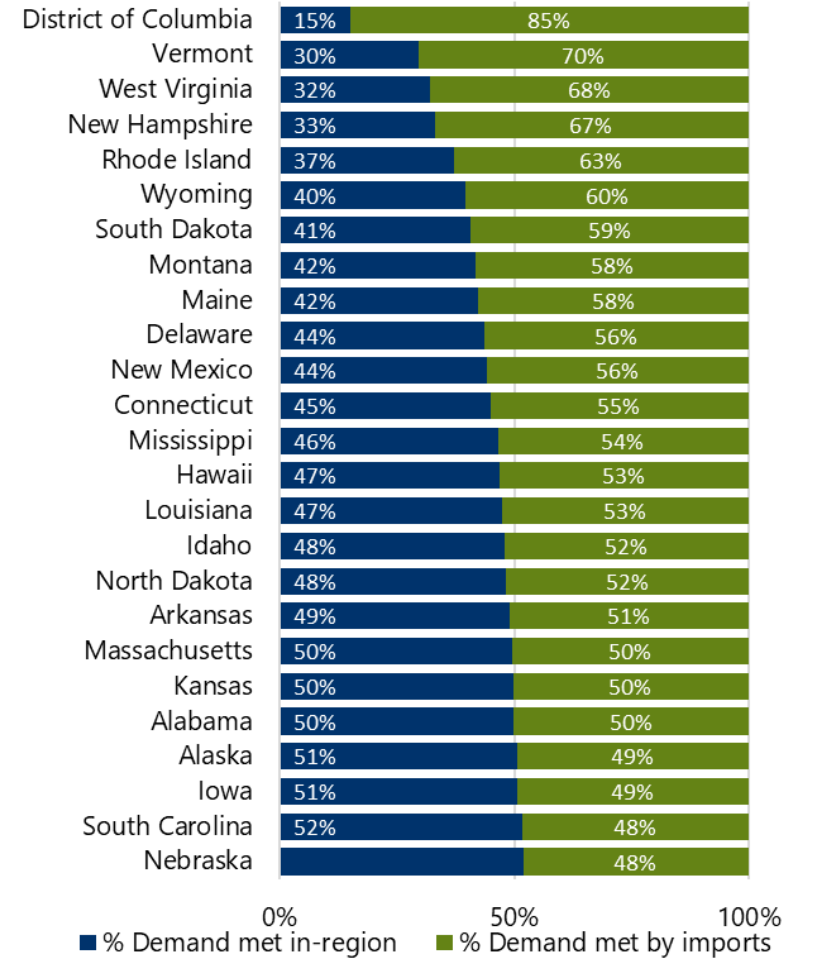
## Top 10 States by Total Demand for Transportation, Warehousing, and Logistics Industry Sector (2022)

	Payrolled Business Locations	Demand met in-region	% Demand met in-region	Demand met by imports	% Demand met by imports	Total Demand
California	35,126	\$134,487,834,031	78.3%	\$37,330,854,416	21.7%	\$171,818,688,447
Texas	25,480	\$104,392,368,107	82.7%	\$21,842,125,860	17.3%	\$126,234,493,967
New York	11,375	\$43,199,384,452	53.2%	\$38,058,576,383	46.8%	\$81,257,960,835
Florida	22,093	\$57,293,888,322	80.8%	\$13,601,346,246	19.2%	\$70,895,234,569
Illinois	20,545	\$42,330,754,381	74.8%	\$14,231,327,981	25.2%	\$56,562,082,362
Pennsylvania	10,863	\$30,904,110,954	62.9%	\$18,237,326,991	37.1%	\$49,141,437,945
Ohio	9,898	\$29,144,577,828	62.4%	\$17,547,037,704	37.6%	\$46,691,615,531
Georgia	9,255	\$30,696,554,077	75.0%	\$10,238,078,428	25.0%	\$40,934,632,505
New Jersey	9,168	\$26,063,684,226	65.2%	\$13,933,967,623	34.8%	\$39,997,651,848
North Carolina	9,503	\$22,699,168,155	61.6%	\$14,175,288,038	38.4%	\$36,874,456,192

Source: Lightcast

- **California has the greatest demand at \$134.5 billion in 2022**, followed by Texas (\$104.4 billion), and Florida (\$57.3 billion).
- **Maine ranks 42<sup>nd</sup> among all states** for total demand.
- **The largest importer of the Transportation, Warehousing, and Logistics Sector is the District of Columbia**, with 85.0% of total demand being met by imports in 2022.
- Maine has a comparatively low share of Transportation, Warehousing, and Logistics demand met in Maine, ranking **9<sup>th</sup> overall by the percent of demand met by imports (58%)**.

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



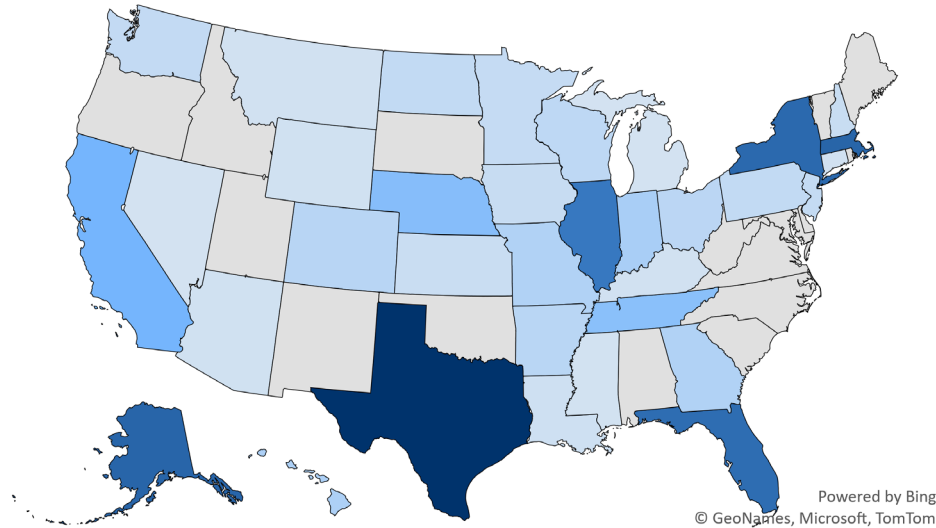
Source: Lightcast

### DATA NOTE:

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

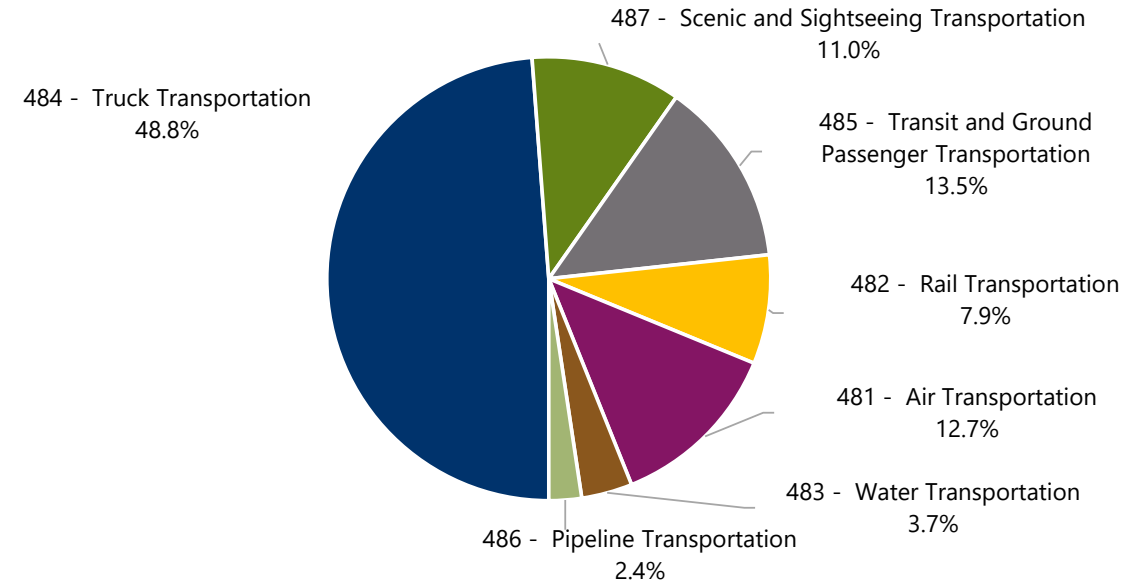
# DOMESTIC IMPORTS

## Out-of-State Suppliers with \$1,000,000 or more of Transportation Imports to Maine (2021)



Source: IMPLAN Data Library

## Import Summary for Transportation, Warehousing and Logistics Products (2021)



Source: IMPLAN Data Library

## Maine imported Transportation, Warehousing, and Logistics from every state in 2021.

- **Texas was the largest overall supplier of the Sector's commodities to Maine in 2021, with nearly \$122 million in trade value.** Other important state suppliers were New York, Alaska, and Massachusetts, from which Maine imported nearly \$100 million of goods and services each.
- Imports of Transportation, Warehousing, and Trade **have increased a compound annual rate of 0.9% from 2011-2021.** Imports to Maine in 2011 were just shy of \$3 billion dollars and by 2021 have now grown to \$3.11 billion.
- **Maine imports a variety of transportation services, but Trucking makes up almost half.** The bulk of imported transportation is for trucking, but Scenic and Sightseeing, Transit and Ground Passenger Transport, as well as Air Transportation all contribute at least 10% of the total imports.

**DATA NOTE:** Figures on this page are from IMPLAN's Data Library and may not match other data in this report. IMPLAN domestic trade flows data covers commodities, or the products and services that are produced by a sector. This differs from other data in this report, which covers NAICS industries. Industries often produce more than one commodity.

# DEMAND & IMPORTS



## TOTAL DEMAND

Maine: \$4.6 Billion  
United States: \$1.3 Trillion

Source: Lightcast, US Census Bureau



## MET BY IMPORTS

Maine: \$2.6 Billion  
United States: N/A

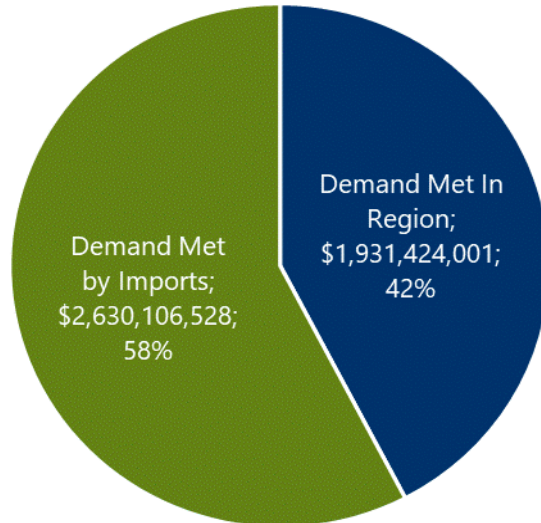


## FOREIGN IMPORTS

Maine: N/A  
United States: N/A

- The Transportation, Warehousing, and Logistics Sector had a total demand of \$4.6 billion in 2022, of which 58% (\$2.6 billion) is met out of state.
- The subsectors that comprise the Transportation, Warehousing, and Logistics Sector do not have trade relationships with countries outside the US.

### Total Demand for Transportation, Warehousing, and Logistics in Maine



Source: Lightcast

### FOREIGN IMPORTS

The Transportation, Warehousing, and Logistics sector in Maine does not conduct significant trade with partners outside the US.

#### DATA NOTE:

Maine's demand for this sector's products shows the size of the local market. The share of that market supplied in-region versus imports (either from other states in the U.S. or other countries) relates the success of local firms or the competitiveness of domestic and international import goods. No foreign imports are identified as the services and operations of the industries used in this report are contained within the State and US, respectively.

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# Industry Sales and Exports

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Where is Maine's Transportation, Warehousing, and Logistics Sector selling to?

# SALES INDUSTRIES Industries Maine Sells To

## Top 25 Sectors the Transportation, Warehousing, and Logistics Industry Sells To, 2022

NAICS	Sales to	In-Region Sales	Percent of In-Region Sales
484121	General Freight Trucking, Long-Distance, Truckload	\$42,296,485	3.3%
447110	Gasoline Stations with Convenience Stores	\$31,785,606	2.5%
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$31,310,482	2.4%
322121	Paper (except Newsprint) Mills	\$29,292,636	2.3%
221122	Electric Power Distribution	\$28,845,921	2.2%
902999	State Government, Excluding Education and Hospitals	\$25,765,503	2.0%
493110	General Warehousing and Storage	\$25,008,827	1.9%
622110	General Medical and Surgical Hospitals	\$20,716,672	1.6%
321113	Sawmills	\$19,869,849	1.5%
492110	Couriers and Express Delivery Services	\$19,793,493	1.5%
424210	Drugs and Druggists' Sundries Merchant Wholesalers	\$19,080,653	1.5%
484220	Specialized Freight (except Used Goods) Trucking, Local	\$17,760,719	1.4%
441110	New Car Dealers	\$16,191,148	1.3%
452311	Warehouse Clubs and Supercenters	\$15,671,580	1.2%
111000	Crop Production	\$15,542,308	1.2%
484110	General Freight Trucking, Local	\$14,978,985	1.2%
238220	Plumbing, Heating, and Air-Conditioning Contractors	\$14,298,507	1.1%
238910	Site Preparation Contractors	\$13,754,266	1.1%
322110	Pulp Mills	\$13,715,496	1.1%
322299	All Other Converted Paper Product Manufacturing	\$13,406,123	1.0%
312120	Breweries	\$12,643,074	1.0%
903999	Local Government, Excluding Education and Hospitals	\$12,622,900	1.0%
113310	Logging	\$12,223,663	1.0%
454310	Fuel Dealers	\$11,690,634	0.9%
444110	Home Centers	\$11,257,369	0.9%

Source: Lightcast

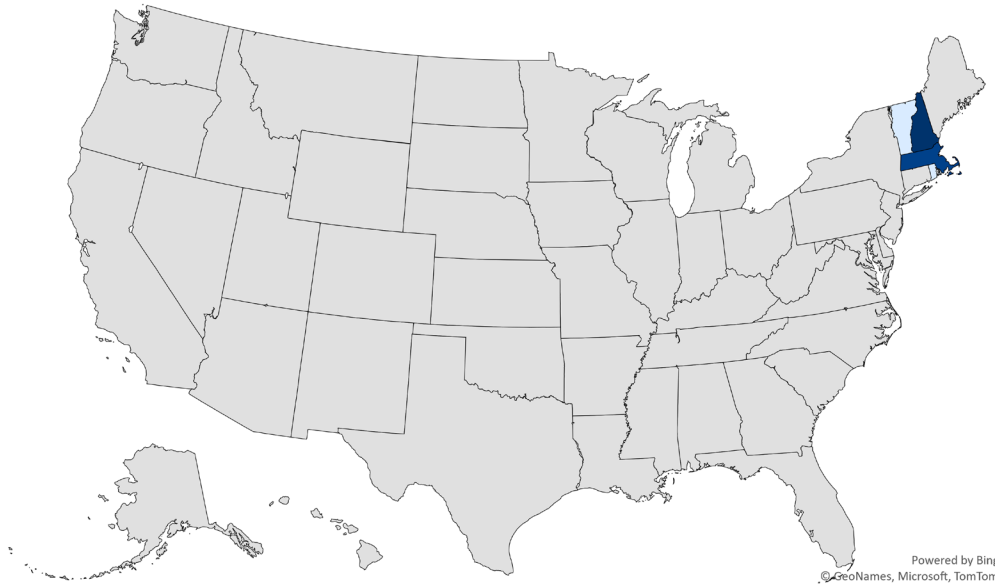
- The top 25 sectors the sector sells to represent 38% of all in-region sales. **This indicates that Transportation, Warehousing, and Logistics sales and demand are broadly spread throughout the Maine economy.**
- **Trucking Freight in Maine make up the largest in-state buyer of the Transportation, Warehousing, and Logistics Sector's products**, with \$42.3 million of in-region sales in 2022. This represents 3.3% of the sector's in-region sales to other industries.
- General Warehousing and Storage, Couriers and Express Delivery Services, Specialized Freight (except Used Goods) Trucking, Local and General Freight Trucking, Local are all **top subsectors that Transportation, Warehousing, and Logistics sells to that are also included in the sector.**
- **Gas Stations with Convenience Stores and Supermarkets** are both in the top five of sales destinations for Transportation, Warehousing, and Logistics. Together these make up almost 5% of total sales in Maine.

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



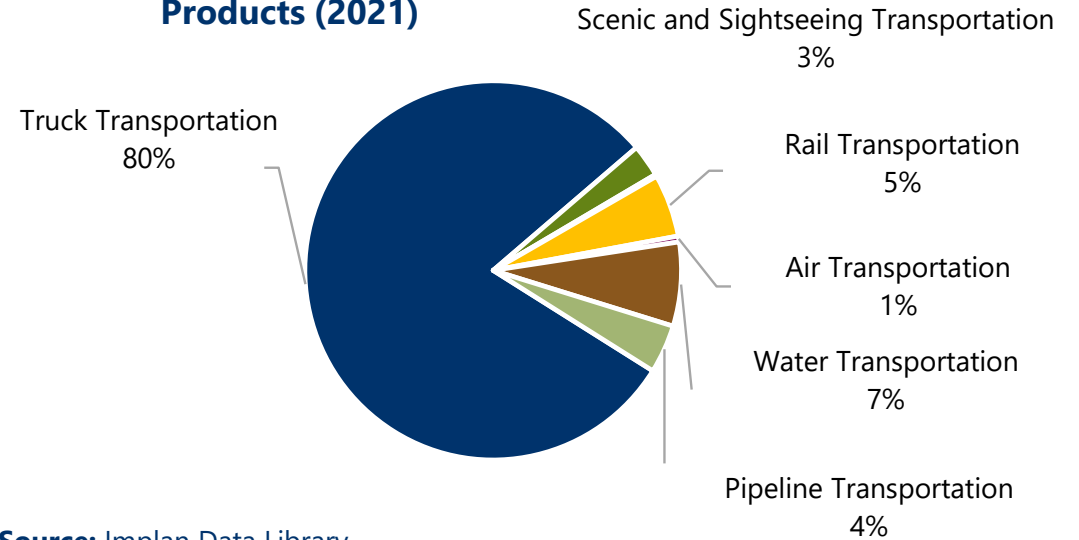
# DOMESTIC EXPORTS

Top States Receiving \$100,000 or More of Transportation Exports (2021)



Source: IMPLAN Data Library

Export Summary for Transportation Products (2021)



Source: Implan Data Library

## Maine exported Transportation, Warehousing, and Logistics almost exclusively in New England.

- **Massachusetts and New Hampshire were the largest buyers of Maine's Transportation, Warehousing, and Logistics products in 2021, each receiving over \$4 million of exports.**
- Exports of Transportation, Warehousing, and Logistics commodities **have decreased at a compound annual rate of -14.8% from 2011-2021.** Maine exports in this sector in 2011 were nearly \$60 million, but they have decreased to \$10.2 million in 2021.
- **Trucking also dominates export flows for this sector, with 80% of the total.** Trucking is a key source for moving goods out of the state and Maine's other transportation options all make up less than 10% of the other sector exports.

### DATA NOTE:

Figures on this page are from IMPLAN's Data Library and may not match other data in this report. IMPLAN domestic trade flows data covers commodities, or the products and services that are produced by a sector. This differs from other data in this report, which covers NAICS industries. Industries often produce more than one commodity.

# SALES & EXPORTS



## TOTAL SALES

Maine: \$3.2 Billion  
United States: \$1.5 Trillion

Source: Lightcast, US Census Bureau



## EXPORTED SALES

Maine: \$1.3 Billion  
United States: N/A

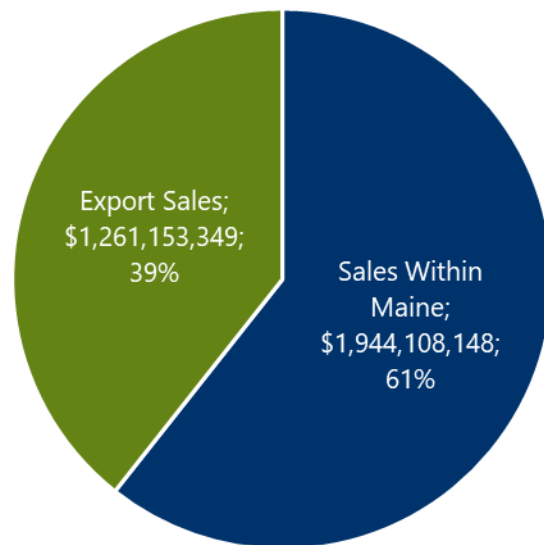


## FOREIGN EXPORTS

Maine: N/A  
United States: N/A

- Transportation, Warehousing, and Logistics in Maine had total sales of \$3.2 billion in 2022, of which 39.3% are exported out of state (\$1.3 billion).
- The subsectors that comprise the Transportation, Warehousing, and Logistics Sector do not have trade relationships with countries outside the US.

### Total Demand for Transportation, Warehousing, and Logistics in Maine



Source: Lightcast

### FOREIGN EXPORTS

The Transportation, Warehousing, and Logistics sector in Maine does not conduct significant trade with partners outside the US.

#### DATA NOTE:

Maine sales and exports for this sector indicate the scale of the industry activity and the share of that activity that is sold locally either as an intermediate good or to end consumers. Exports include sales to domestic (U.S.) markets as well as international exports. No foreign exports are identified as the services and operations of the industries used in this report are contained within the State and US, respectively.

# EMERGING TRENDS

## **Maine Clean Transportation Roadmap**

As a part of the 2020 *Maine Won't Wait* Climate Action Plan, the Clean Transportation Roadmap identifies policies, programs, and regulatory changes that are needed to continue decarbonizing Maine's transportation sector in the future. This roadmap and subsequent clean energy policies can change the dependency on fossil-fuels and increase the production of electric vehicles.

## **Maine Offshore Wind Port Advisory Group**

The State of Maine formed an Offshore Wind Port Advisory Group (OSWPAG) to act as an advisory body for the Maine Department of Transportation, the Governor's Energy Office, and other state authorities. The group's primary purpose was to guide the development of a wind port, enabling Maine to harness the environmental and economic advantages offered by the fast-growing offshore wind industry. This endeavor aimed to align with community values and minimize any negative consequences. By establishing the OSWPAG, a comprehensive framework was put in place to facilitate extensive stakeholder involvement and public communication throughout the wind port development process. The project wrapped up in June 2023.

## **Maine Cold Storage Demand**

Maine, with its significant seafood and agricultural industries, has a demand for cold storage facilities to preserve and store perishable goods. Cold storage facilities, also known as refrigerated warehouses, are used to maintain low temperatures to prevent spoilage and extend the shelf life of products. These facilities are crucial for storing seafood, meat, dairy products, fruits, vegetables, and other temperature-sensitive items.

## **Maine Food Supply Chain Infrastructure Improvements**

One of the key focuses is improving transportation and logistics infrastructure. This includes investments in roads, highways, bridges, and ports to enhance connectivity and facilitate the efficient movement of goods. Maine has been working on upgrading transportation networks to ensure smooth transportation of agricultural and seafood products from production centers to distribution centers and export markets.

## **Recruiting Additional Workforce**

Maine presents a significant opportunity to recruit jobs in the transportation, warehousing, and logistics industries. The industry offers a range of entry-level positions that require varying levels of education and experience. This accessibility encourages a diverse pool of candidates to enter the field, contributing to a vibrant and dynamic workforce. As a result, businesses and organizations involved in transportation, warehousing, and logistics can tap into this talent pool and recruit skilled individuals to meet their workforce needs, fostering growth and development within these industries in Maine.

## **Finger Lake Passenger Rail Authority has proposed a passenger train service to Rockland**

Planning is moving ahead to add passenger service up to Rockland. Infrastructure and operations details are still pending approval by the Maine Department of Transportation and the Northern New England Passenger Rail Authority, but if it goes forward, it will create a transit link between Boston and Down-east coastal Maine with a trip at least once a day year-round.

# RECENT INVESTMENTS

**Continued federal investment in Portland Jetport (PMW) operational infrastructure** – In 2021, multiple US Department of Transportation grants were awarded to Maine’s largest airport. The Airport Improvement Program will contribute nearly \$6 million in funding to construct a 1,225-foot taxiway to improve movements on Runway 11 and repair and rehabilitate other taxiways and service roads that are key parts of the jetport’s master plan.

**Eimskip makes accommodations for larger ocean-going freighters** – Recent changes brought on by strong demand (freight volumes have increased each of the last seven years) spurred the Icelandic company to make room for a higher capacity vessel. The Pictor J is a 461-foot-long container ship that can hold nearly 1,000 shipping containers. This is almost twice the number of the previous class of ships. **Marine freight has doubled since 2017 as Portland harbor has become one of the fastest growing on the eastern seaboard.** Frozen seafood products is the chief export from Maine. A diverse variety of imported goods will arrive on the Pictor J.

**Maine International Cold Storage Facility (MICSP)** – new on-site cold storage warehouse in Portland. The facility is a \$55 million, 107,000 sf cold-storage facility. This will have several operational benefits for Eimskip and will also directly tie to increased demand for seafood exports.

**Consolidation in Maine rail as CSX acquiring Pan Am Railways and Canadian Pacific acquiring Central Maine & Quebec Railway in the last year** – As part of a larger 1,200-mile network that extends south to New York, through Massachusetts and north into Vermont, New Hampshire and Maine, this gives CSX, a national Class I railroad, new access to northeast markets. For Maine, this brings a much larger network to lines that connect Portland, including the waterfront, up through Lewiston-Auburn, and on into Waterville. Canadian Pacific gives its transnational network another link on the eastern seaboard.

**Amtrak Downeaster Invests in existing service and looks at extension to Rockland** – Substantial federal funds will go towards both passenger and operational improvements to the Wells area in southern Maine. The Downeaster makes ten daily stops at the station and the project will build a new platform (and access ramp) to improve customer experience and help with larger volumes that have been experienced recently. There is also an expansion of passing siding track near the area that will provide benefits both to the Downeaster and to freight operations using this part of the network.

**Federal government allocates \$15 million in funding for dredging of Searsport harbor** – nearly \$6 million in maintenance funding from the Senate Appropriations Committee to dredge Searsport harbor in the Penobscot Bay for deepwater operations and expanded water-borne freight. This is coupled with another \$9 million for highway access improvements to improve multi-modal connections to the port. Together these investments will enable a wider range of activities, including infrastructure support and staging for proposed off-shore wind projects that are slated for the area.

**Millinocket Paper Mill Revitalization will include a rail line extension estimated at \$20 million** - A wood pellet production facility and expanded rail lines are at the center of a new proposal to revitalize the former Great Northern Paper mill in Millinocket. NBM Railways and Canadian Pacific Railway, which will own the 106-mile rail corridor, have joined Our Katahdin and the Maine DOT in applying for the grant with the Federal Railroad Administration. If they’re successful, Highland Carbon Solutions and NBM Railways would provide matching funds. The Maine DOT would manage the grant money, which would fund a rail line extension and safety improvements, in addition to infrastructure upgrades at Mack Point.

# TRADE SHOWS

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

## **ASCM CONNECT – Chicago, IL**

Immerse yourself in a one-day experience that includes trending topics, networking and best practice sharing. The ASCM Supply Chain tour is brought to you by the industry leader in supply chain education.

## **Mid-America Trucking Show – Louisville, KY**

From association meetings and hospitality events to education and press events, MATS is the venue of choice for trucking industry events. Events offer direct engagement with your target audience. Connect with the industry and position your company as a thought leader focused on improving their businesses.

## **CSCMP Edge Supply Chain Conference & Exhibition – Nashville, TN**

The global landscape has fundamentally shifted, accelerating the need for supply chains to broaden their mission and deliver competitive advantage. Connect with your global supply chain community to discover the latest innovations, new strategies, and best practices like never before.

## **Modex – Atlanta, GA**

The future of our industry depends on today's forward-thinking decisions. From illuminating education to emerging technologies and equipment in action, MODEX lets you see the full spectrum of what's now and what's next — and take advantage of it to futureproof your supply chain for years to come. MODEX 2024 is your unique event opportunity to make new contacts, discover cutting-edge solutions, and learn the latest trends that are sure to give you a leg up on the competition.

## **Transport Logistics America – Miami, FL**

Transport logistic Americas & air cargo forum Miami reflects the entire value chain of the industry - the only multimodal event of North America. Get insights from the industry experts of the air cargo, transportation, logistics and supply chain industry. Increase your profits by engaging with cargo shippers from the US, North and South America, as well as from all important markets around the world.

## **Manifest – Las Vegas, NV**

The premiere gathering of industry leaders, innovators, and investors in a showcase of the cutting edge of Logistics and Supply Chain. Get unprecedented access to the people and technologies changing the way the world moves.

## **IWLA Convention & Expo – Palm Springs, CA**

Attracts hundreds of warehouse logistics leaders each year – and many of them cite the IWLA Convention & Expo as a major attraction during convention. This trade show floor is the one place where supplier partners can tell their stories directly to warehouse-based 3PL executives.

# OTHER RESOURCES

## **Maine Motor Transport Association (MMTA)**

Is a large trade association that focuses on trucking, safety, and educational resources to organizations within the industry. The mission statement of MMTA is “to foster and promote the motor transportation industry in the State of Maine and elsewhere.”

## **Maine Maritime Academy (MMA)**

MMA is a public, co-educational college located in the coastal town of Castine, Maine focused on marine and related programs including engineering, management, science, logistics and transportation.

## **Northern New England Passenger Rail Authority**

This is a public transportation authority based in Maine that provides leadership, coordination, and management of the integrated passenger rail service in Maine and Northern New England.

**Cargo Ports:** Ports are assets for foreign trade however ports relate to domestic supply chains and the movement of commodities throughout the state. Maine Cargo Ports include Portland, Searsport Cargo Port, and Eastport Port Authority.

**Maine Port Authority:** The Maine Port Authority improves the global competitiveness of Maine businesses, and in concert with public and private organizations, facilitates commerce by developing marine and rail facilities, and other viable endeavors in a responsible fashion, for the intermodal movement of people and cargo in support of economic development.

# APPENDIX

## Summary Metrics for Transportation, Warehousing, and Logistics

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
	Transportation	12,630	12,003	(627)	-5%	\$70,725	0.68	(737)	1,239	\$3,581,652,768	\$2,057,132,342	\$2,674,772,415	\$1,201,364,002	\$100,089
481111	Scheduled Passenger Air Transportation	158	160	3	+2%	\$53,468	0.09	10	8	\$631,899,857	\$604,542,870	\$33,837,834	\$14,880,827	\$92,879
481112	Scheduled Freight Air Transportation	4	1	(3)	-76%	\$65,132	0.02	(3)	2	\$17,512,729	\$17,335,257	\$230,271	\$101,657	\$112,727
481211	Nonscheduled Chartered Passenger Air Transportation	50	71	22	+44%	\$82,877	0.44	13	17	\$77,067,429	\$57,496,217	\$25,018,614	\$11,077,108	\$155,522
481212	Nonscheduled Chartered Freight Air Transportation	0	0	0	+	\$0	0.00	0	0	\$20,671,649	\$20,671,649	\$0	\$0	Insf. Data
481219	Other Nonscheduled Air Transportation	44	22	(21)	-49%	\$104,675	0.70	(34)	2	\$17,114,751	\$10,125,503	\$10,091,018	\$4,460,888	\$200,635
482110	Rail transportation	632	684	52	+8%	\$91,241	0.73	133	1	\$238,403,665	\$97,528,466	\$249,872,962	\$134,945,620	\$197,240
483111	Deep Sea Freight Transportation	0	1	1	+135%	\$121,613	0.02	1	1	\$28,599,479	\$27,918,984	\$893,356	\$277,103	\$242,458
483112	Deep Sea Passenger Transportation	0	0	0	+	\$0	0.00	0	0	\$23,319,885	\$23,319,885	\$0	\$0	Insf. Data
483113	Coastal and Great Lakes Freight Transportation	8	6	(1)	-17%	\$69,425	0.15	(0)	1	\$19,562,194	\$17,179,747	\$3,216,141	\$999,764	\$157,310
483114	Coastal and Great Lakes Passenger Transportation	44	57	12	+28%	\$44,407	2.90	32	5	\$6,429,277	\$3,006,781	\$15,359,092	\$4,745,696	\$83,988
483211	Inland Water Freight Transportation	19	26	7	+35%	\$89,450	0.28	7	3	\$38,158,981	\$27,582,611	\$13,957,863	\$4,346,937	\$166,465
483212	Inland Water Passenger Transportation	43	54	11	+24%	\$55,958	3.21	16	8	\$5,248,461	\$1,492,898	\$18,349,212	\$5,705,782	\$105,759
484110	General Freight Trucking, Local	916	1,001	85	+9%	\$75,886	0.67	(47)	156	\$323,703,822	\$148,591,068	\$267,638,660	\$110,621,735	\$110,502
484121	General Freight Trucking, Long-Distance, Truckload	2,497	2,656	159	+6%	\$87,168	0.85	(54)	164	\$625,855,244	\$210,057,366	\$718,791,109	\$297,812,144	\$112,124
484122	General Freight Trucking, Long-Distance, Less Than Truckload	679	510	(169)	-25%	\$88,763	0.42	(238)	42	\$264,975,832	\$149,361,753	\$149,862,402	\$61,867,429	\$121,416
484210	Used Household and Office Goods Moving	577	564	(13)	-2%	\$67,180	1.25	(33)	37	\$60,551,841	\$24,120,380	\$110,820,477	\$44,838,324	\$79,536
484220	Specialized Freight (except Used Goods) Trucking, Local	1,711	1,668	(43)	-2%	\$72,467	1.71	(51)	328	\$180,916,156	\$32,233,181	\$355,033,487	\$146,309,793	\$87,711
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	700	506	(194)	-28%	\$85,959	0.88	(176)	74	\$118,984,121	\$44,911,657	\$128,361,524	\$52,687,719	\$104,039
485111	Mixed Mode Transit Systems	0	0	0	+	\$0	0.00	0	0	\$1,765,301	\$1,765,301	\$0	\$0	Insf. Data
485112	Commuter Rail Systems	0	0	0	+	\$0	0.00	0	0	\$325,303	\$325,303	\$0	\$0	Insf. Data
485113	Bus and Other Motor Vehicle Transit Systems	1	28	27	+2,556%	\$48,819	0.19	27	1	\$14,100,443	\$13,178,488	\$2,334,349	\$1,440,896	\$51,461
485119	Other Urban Transit Systems	0	0	0	+	\$0	0.00	0	0	\$147,734	\$147,734	\$0	\$0	Insf. Data
485210	Interurban and Rural Bus Transportation	255	209	(46)	-18%	\$50,680	3.36	22	11	\$5,409,706	\$601,801	\$19,012,777	\$10,960,093	\$52,483
485310	Taxi Service	530	236	(294)	-55%	\$29,128	0.64	(206)	26	\$78,471,217	\$46,001,468	\$33,451,130	\$21,620,421	\$91,506
485320	Limousine Service	159	103	(56)	-35%	\$32,224	0.16	(26)	11	\$74,442,043	\$59,320,421	\$15,279,009	\$9,853,916	\$96,078
485410	School and Employee Bus Transportation	808	657	(152)	-19%	\$40,232	0.83	(74)	35	\$46,976,523	\$16,993,788	\$46,471,920	\$29,636,157	\$45,112
485510	Charter Bus Industry	172	108	(64)	-37%	\$45,914	1.23	(8)	4	\$7,353,300	\$3,207,068	\$8,588,470	\$5,080,709	\$47,211
485991	Special Needs Transportation	145	230	85	+58%	\$45,968	0.79	103	13	\$23,509,561	\$12,603,140	\$19,012,440	\$11,970,509	\$52,026
485999	All Other Transit and Ground Passenger Transportation	140	75	(64)	-46%	\$90,727	0.50	(54)	6	\$17,366,608	\$6,570,543	\$13,960,863	\$8,656,586	\$114,665

# APPENDIX

## Summary Metrics for Transportation, Warehousing, and Logistics

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
	Transportation	12,630	12,003	(627)	-5%	\$70,725	0.68	(737)	1,239	\$3,581,652,768	\$2,057,132,342	\$2,674,772,415	\$1,201,364,002	\$100,089
486110	Pipeline Transportation of Crude Oil	1	4	3	+244%	\$110,733	0.08	3	1	\$15,069,909	\$12,910,675	\$3,057,366	\$2,217,517	\$616,294
486210	Pipeline Transportation of Natural Gas	80	60	(20)	-25%	\$151,141	0.46	(24)	8	\$48,395,149	\$15,715,492	\$70,637,808	\$51,270,678	\$849,528
486910	Pipeline Transportation of Refined Petroleum Products	1	8	8	+1,012%	\$110,751	0.27	8	1	\$9,870,682	\$5,759,044	\$7,076,240	\$5,130,135	\$605,927
486990	All Other Pipeline Transportation	0	0	0	+	\$0	0.00	0	0	\$981,118	\$981,118	\$0	\$0	Insf. Data
487110	Scenic and Sightseeing Transportation, Land	74	47	(27)	-37%	\$45,686	1.06	(4)	12	\$4,377,660	\$439,512	\$8,786,457	\$3,784,114	\$80,262
487210	Scenic and Sightseeing Transportation, Water	272	390	118	+44%	\$43,087	4.76	114	56	\$7,758,461	\$1,381,007	\$44,762,781	\$19,508,020	\$50,003
487990	Scenic and Sightseeing Transportation, Other	37	24	(13)	-35%	\$43,633	2.08	(6)	3	\$1,515,787	\$815,229	\$2,788,376	\$1,110,151	\$46,174
488111	Air Traffic Control	0	0	0	+	\$0	0.00	0	0	\$1,470,431	\$1,470,431	\$0	\$0	Insf. Data
488119	Other Airport Operations	446	374	(71)	-16%	\$39,038	0.89	(74)	11	\$36,281,498	\$10,704,588	\$37,775,386	\$16,781,441	\$44,836
488190	Other Support Activities for Air Transportation	329	387	59	+18%	\$66,740	0.72	26	29	\$85,570,199	\$37,702,641	\$67,172,932	\$29,932,135	\$77,292
488210	Support Activities for Rail Transportation	20	33	13	+63%	\$49,851	0.22	12	4	\$20,277,523	\$17,573,206	\$4,356,304	\$1,929,209	\$59,139
488310	Port and Harbor Operations	8	11	3	+35%	\$61,331	0.35	2	2	\$5,445,340	\$4,180,276	\$1,947,575	\$829,871	\$78,207
488320	Marine Cargo Handling	90	44	(46)	-51%	\$72,720	0.16	(52)	4	\$58,030,074	\$51,443,020	\$8,333,855	\$3,710,145	\$83,727
488330	Navigational Services to Shipping	68	56	(13)	-18%	\$96,383	0.81	(12)	10	\$14,024,311	\$7,987,268	\$14,424,365	\$6,361,317	\$114,468
488390	Other Support Activities for Water Transportation	14	21	7	+46%	\$62,557	0.64	7	7	\$6,638,210	\$3,201,689	\$3,969,294	\$1,720,150	\$82,332
488410	Motor Vehicle Towing	277	326	49	+18%	\$48,677	0.97	23	48	\$42,232,053	\$19,176,515	\$43,062,995	\$19,143,182	\$58,698
488490	Other Support Activities for Road Transportation	72	87	15	+21%	\$41,715	0.47	8	22	\$22,447,649	\$16,137,222	\$9,706,580	\$4,292,346	\$49,577
488510	Freight Transportation Arrangement	300	279	(22)	-7%	\$71,646	0.21	(74)	57	\$212,478,502	\$163,370,234	\$54,474,082	\$24,305,740	\$87,237
488991	Packing and Crating	63	106	43	+68%	\$44,584	1.14	32	6	\$10,237,603	\$5,249,248	\$12,257,590	\$5,360,347	\$50,534
488999	All Other Support Activities for Transportation	186	113	(74)	-40%	\$70,797	1.80	(84)	6	\$9,707,495	\$2,742,602	\$20,737,448	\$9,079,692	\$80,579
	Warehousing & Storage	4,705	3,729	(975)	-21%	\$64,903	0.47	(4,942)	73	\$867,404,417	\$493,980,166	\$488,518,873	\$264,190,554	\$70,839
493110	General Warehousing and Storage	4,564	3,615	(949)	-21%	\$64,660	0.49	(4,900)	45	\$787,233,858	\$432,716,436	\$467,379,545	\$252,850,072	\$69,947
493120	Refrigerated Warehousing and Storage	78	54	(24)	-31%	\$72,263	0.18	(36)	9	\$40,554,042	\$32,493,675	\$8,697,749	\$4,673,392	\$86,986
493130	Farm Product Warehousing and Storage	13	1	(12)	-94%	\$64,511	0.02	(11)	2	\$6,047,737	\$5,586,057	\$470,584	\$245,244	Insf. Data
493190	Other Warehousing and Storage	50	60	10	+21%	\$72,995	0.27	5	17	\$33,568,780	\$23,183,998	\$11,970,995	\$6,421,845	\$106,946
	Process, Physical Distribution, and Logistics Consulting Services	200	207	7	+3%	\$90,095	0.32	(43)	109	\$75,403,352	\$44,781,584	\$38,955,693	\$23,814,248	\$115,091
541614	Process, Physical Distribution, and Logistics Consulting Services	200	207	7	+3%	\$90,095	0.32	(43)	109	\$75,403,352	\$44,781,584	\$38,955,693	\$23,814,248	\$115,091
	Packaging and Labeling Services	12	28	16	+130%	\$39,652	0.10	14	7	\$37,069,992	\$34,212,436	\$3,014,516	\$1,345,249	\$48,045
561910	Packaging and Labeling Services	12	28	16	+130%	\$39,652	0.10	14	7	\$37,069,992	\$34,212,436	\$3,014,516	\$1,345,249	\$48,045
	<b>Total for Maine</b>	<b>17,546</b>	<b>15,967</b>	<b>(1,579)</b>	<b>-9%</b>	<b>\$69,562</b>	<b>0.60</b>	<b>(5,707)</b>	<b>1,427</b>	<b>\$4,561,530,529</b>	<b>\$2,630,106,528</b>	<b>\$3,205,261,497</b>	<b>\$1,490,714,053</b>	<b>\$93,360</b>
	<b>Total for United States</b>	<b>5,258,280</b>	<b>6,151,408</b>	<b>893,127</b>	<b>+17%</b>	<b>\$75,280</b>	<b>-</b>	<b>0</b>	<b>298,724</b>	<b>\$1,314,220,023,160</b>	<b>-</b>	<b>\$1,456,261,426,770</b>	<b>\$1,328,110,348,750</b>	<b>\$215,903</b>

Source: Lightcast



# APPENDIX

NAICS	Description
	Transportation
481111	Scheduled Passenger Air Transportation
481112	Scheduled Freight Air Transportation
481211	Nonscheduled Chartered Passenger Air Transportation
481212	Nonscheduled Chartered Freight Air Transportation
481219	Other Nonscheduled Air Transportation
482110	Rail transportation
483111	Deep Sea Freight Transportation
483112	Deep Sea Passenger Transportation
483113	Coastal and Great Lakes Freight Transportation
483114	Coastal and Great Lakes Passenger Transportation
483211	Inland Water Freight Transportation
483212	Inland Water Passenger Transportation
484110	General Freight Trucking, Local
484121	General Freight Trucking, Long-Distance, Truckload
484122	General Freight Trucking, Long-Distance, Less Than Truckload
484210	Used Household and Office Goods Moving
484220	Specialized Freight (except Used Goods) Trucking, Local
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance
485111	Mixed Mode Transit Systems
485112	Commuter Rail Systems
485113	Bus and Other Motor Vehicle Transit Systems
485119	Other Urban Transit Systems
485210	Interurban and Rural Bus Transportation
485310	Taxi Service
485320	Limousine Service
485410	School and Employee Bus Transportation
485510	Charter Bus Industry
485991	Special Needs Transportation
485999	All Other Transit and Ground Passenger Transportation

NAICS	Description
	Transportation
486110	Pipeline Transportation of Crude Oil
486210	Pipeline Transportation of Natural Gas
486910	Pipeline Transportation of Refined Petroleum Products
486990	All Other Pipeline Transportation
487110	Scenic and Sightseeing Transportation, Land
487210	Scenic and Sightseeing Transportation, Water
487990	Scenic and Sightseeing Transportation, Other
488111	Air Traffic Control
488119	Other Airport Operations
488190	Other Support Activities for Air Transportation
488210	Support Activities for Rail Transportation
488310	Port and Harbor Operations
488320	Marine Cargo Handling
488330	Navigational Services to Shipping
488390	Other Support Activities for Water Transportation
488410	Motor Vehicle Towing
488490	Other Support Activities for Road Transportation
488510	Freight Transportation Arrangement
488991	Packing and Crating
488999	All Other Support Activities for Transportation
	Warehousing & Storage
493110	General Warehousing and Storage
493120	Refrigerated Warehousing and Storage
493130	Farm Product Warehousing and Storage
493190	Other Warehousing and Storage
	Process, Physical Distribution, and Logistics Consulting Services
541614	Process, Physical Distribution, and Logistics Consulting Services
	Packaging and Labeling Services
561910	Packaging and Labeling Services

# GLOSSARY

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

**Demand:** Regional sales demand for sales of Industry

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

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

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

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

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

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

**Source:** Lightcast Knowledge Base, IBIS World

# DATA SOURCES



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