

Textiles: Industry Profile

JANUARY 2024

State of Maine - DECD

MAINE.

ECONOMIC & COMMUNITY
DEVELOPMENT

PROJECT OVERVIEW

Report Purpose

This document provides an in-depth analysis of the Textiles 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 Textiles Sector. For details about all industries that are included in this analysis, please see the Appendix.

Project Funding

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

Data

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



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KEY FINDINGS

Sector Activity

Textiles represents a historic, legacy sector and one of Maine's oldest manufacturing activities. However, the industry faced many challenges, including foreign competition, leading to employment decline in recent years. That being said, it still has a relatively high concentration in Maine, with subsectors such as Textile Product Mills and Footwear Manufacturing, having a significantly higher concentration of employment in Maine compared to the nation on average.

Maine Textile manufacturers and wholesalers play an important role in supplying critical healthcare and social services industries in Maine, such as residential facilities, hospitals, nursing care facilities and services for the elderly, and more. Similarly, they offer key inputs to other heritage manufacturing industries in Maine such as paper manufacturing, boat building, and agriculture.

The sector has strong trade activity, with 88% of all sector sales being exported outside of Maine. Currently, Maine's largest domestic markets are California, Texas, and New York. New potential opportunities may be found in the Midwest, Mountain Region, and South Atlantic.

Footwear Manufacturing makes up the largest share of the sector, with over 1,500 jobs in 2022. Meanwhile, **Textile Bag and Canvas Mills represent the fastest-growing industry in Maine,** adding 164 jobs from 2017-2022. Along with Curtain and Linen, these are two of only four sub-industries in the Textiles sector that grew in Maine since 2017.

Subsectors included in this report

- **313: Textile Mills**– These establishments transform a basic fiber, either natural or synthetic, into a product such as yarn or fabric that is further manufactured into usable items.
- **314: Textile Product Mills** – These establishments make textile products except apparel. In most cases, the processes these establishments use are cut and sew, or purchasing fabric and cutting and sewing it to make textile products such as sheets, towels, carpets and rugs, curtains and linens, etc.
- **315: Apparel Manufacturing** – These establishments engage in two distinct manufacturing processes: 1) cut and sew of purchased fabric, and 2) both manufacturing knit fabric as well as cutting and sewing it into a garment.
- **316: Leather and Allied Product Manufacturing** – these establishments transform hides into leather and fabricate the leather into products for final consumption. This subsector also includes manufacturers of similar products from other materials or “leather substitutes”, such as rubber, plastics, or other textiles. Rubber footwear, textile luggage, and plastic purses or wallets are included in this subsector because they are made in similar ways leather products are made, often in the same establishments.
- **Related Wholesale Subsectors:**
 - 424310: Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers
 - 424340: Footwear Merchant Wholesalers
 - 424350: Clothing and Clothing Accessories Merchant Wholesalers

NATIONAL TRENDS

KEY TRENDS

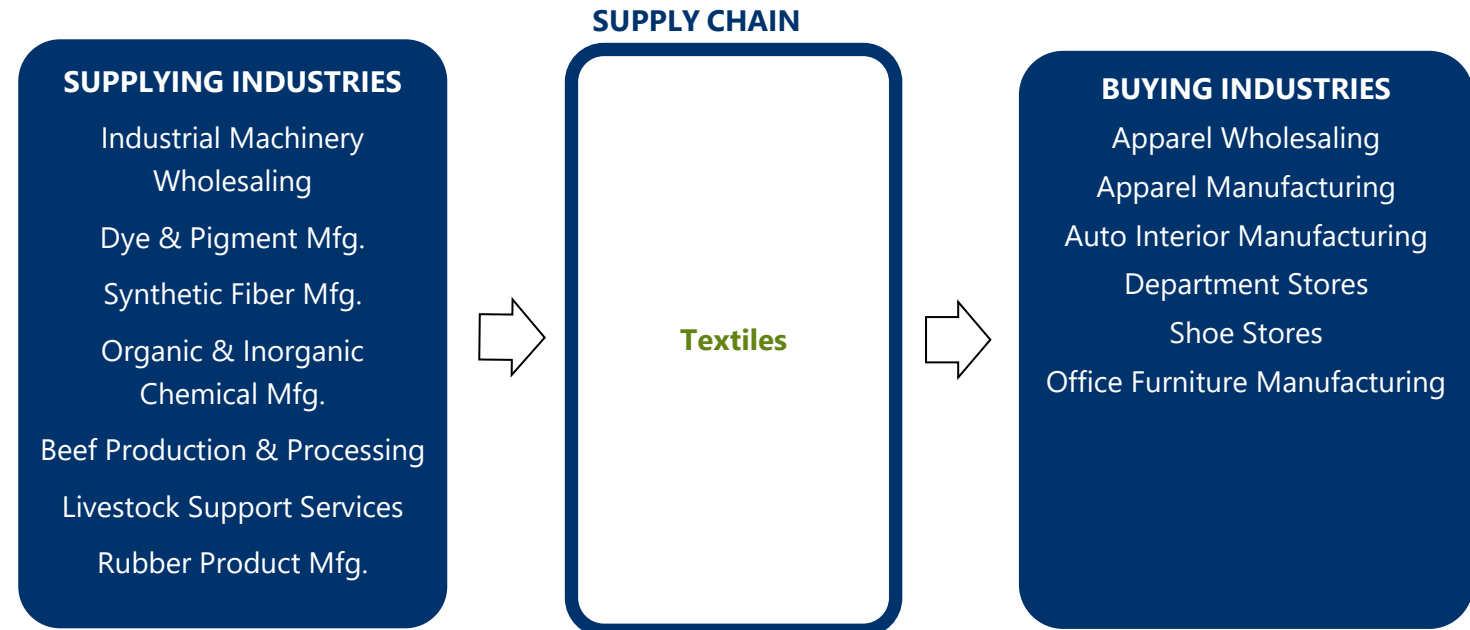
- New Balance, with a significant presence in Maine, holds 13.8% of the US shoe & footwear market. An estimated 10% of New Balance's global employment is based in Maine.
- Manufacturers have continued to offshore production activity to developing countries to reduce labor costs and offer more competitively priced products
- Competing on quality over price has benefitted domestic manufacturers since the US cannot compete with the low production costs of other countries
- Low-cost foreign apparel manufacturing shrinks domestic textile revenue

RECENT DEVELOPMENTS

- Sustained import penetration and falling exports have been influenced by high levels of competition
- The COVID-19 pandemic disrupted industry supply chains and destabilized international trade as well as domestic demand
- Imports sustained a very high share of domestic demand over the past five years
- Domestic textile production has shifted focus to invest in automated processes more than in foreign production facilities

INDUSTRY DRIVERS

- Trade-weighted index
- Demand from apparel manufacturing
- Demand from footwear wholesaling
- Import penetration into the manufacturing sector
- Per capita disposable income
- Demand from auto manufacturing & new car sales



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)
539,500



Job Growth
2017-2022: -7.5%
2022-2027 Projected: -0.5%



Establishments (2022)
79,011



Avg. earnings (2022)
\$50,554



Domestic Demand (2022)
\$249 Billion

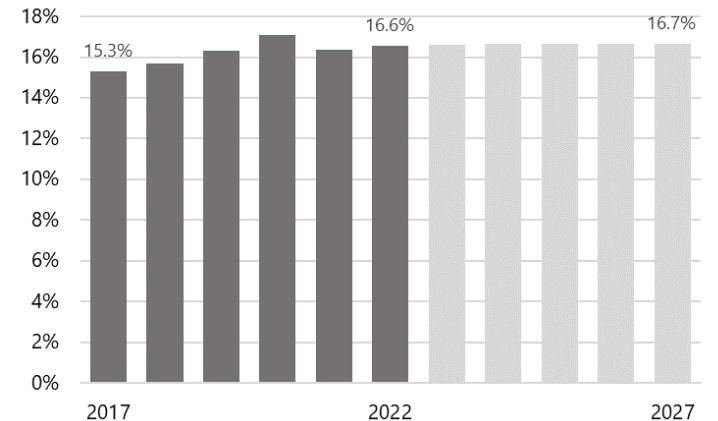
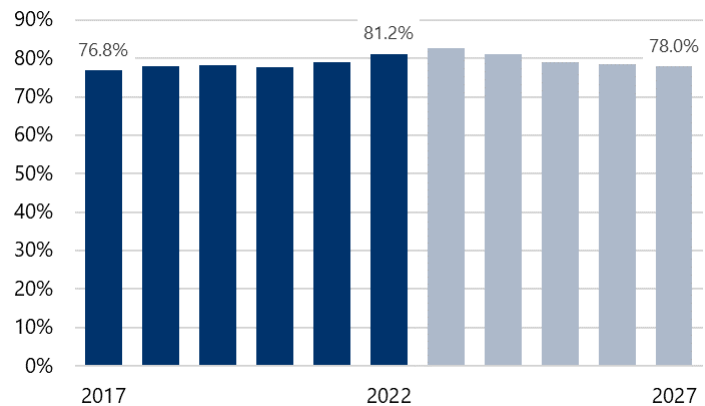
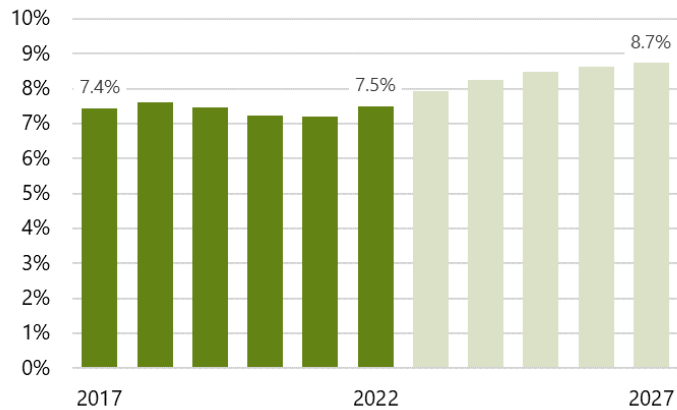


Top Countries (2022)
Imports: China, Vietnam, India, Bangladesh, Indonesia
Exports: Canada, Mexico, Honduras, China, Dominican Republic

The exports share of revenue was 7.5% in 2022. This indicator shows the relative importance of exports to the sector's overall revenue strength.

The imports share of domestic demand was 81.2% in 2022. This demonstrates how much of demand for the sector's products in the US are met by foreign imports.

The value-add-to-revenue ratio was 16.6% in 2022. This indicator shows how much value the production process adds to products relative to the overall size of the sector.



SECTOR SUMMARY: MAINE PERFORMANCE

Textiles Summary

Jobs: 3,683

- Data for 2022
- 0.5% of the state's total employment

Concentration: 1.71

- Data for 2022
- Maine's employment in Textiles was 1.71 times more concentrated than the nation. Footwear Manufacturing showed the highest concentration (22.54)

Competitive Effect: -551

- Data compares 2017-2022
- Despite decline at the national level, Maine's textiles sector declined by 551 jobs more than expected given national trends

Total Sales: \$898.0 Million

- Data for 2022
- 88% of sales were exported out of state

Job Growth: -958

- Data compares 2017-2022
- Decline in Maine is driven by Footwear Manufacturing (-335), Nonwoven Fabric Mills (-184), and Broadwoven Fabric Mills (-170)

Establishments: 169

- Data for 2022
- Maine textile establishments were larger than the nation, averaging 22 jobs per establishment in Maine compared to 15 in the US

Gross Regional Product: \$306.1 Million

- Data for 2022
- 0.4% of the state's total GRP, comparable to the US (0.3%)

Demand: \$516.3 Million

- Data for 2022
- 20% of demand was met by in-state sources

Job Growth Rate: -21%

- Data compares 2017-2022
- Decline was more severe than the US, which declined by 11% during this period

Average Earnings: \$57,993

- Data for 2022
- Lower than the average earnings for Textile workers in the United States (\$71,618) and the State average for all sectors (\$68,259)

Productivity: \$83,105

- Data for 2022
- GRP per worker
- Lower than the US (\$137,027)

Leakage: \$413.1 Million

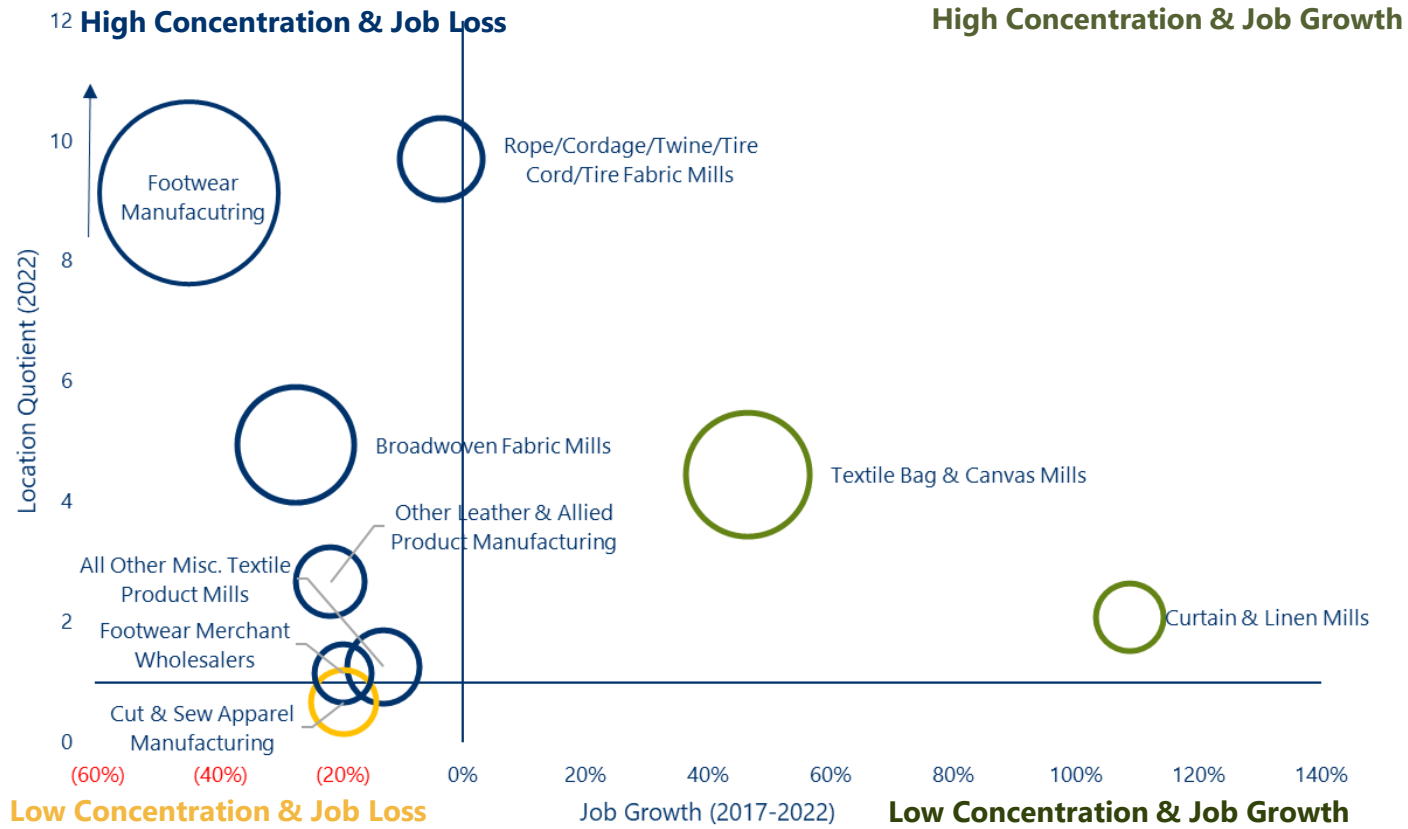
- Data for 2022
- \$413.1 million of demand was met by out-of-state sources

Source: Lightcast

DATA NOTE:

National figures on this page were calculated using a different source than on page 8, which may lead to some differences.

KEY INDUSTRIES



Bubble size = 2022 jobs

Source: Lightcast, Camoin Associates

Note: Figure includes 6-digit NAICS industries with at least 100 jobs in 2022. Footwear Manufacturing has a Location Quotient of 22.54, though the axes of this figure have been altered to improve clarity.

Findings:

- Many industries fall into the “maturing” category, with high employment but recent job loss. This includes Footwear Manufacturing, the largest industry in the sector, along with several others.
- Two industries are in the upper-right quadrant, representing both strong employment concentration along with recent job growth. This includes Textile Bag and Canvas Mills as well as Curtain and Linen Mills.
- One industry, Cut and Sew Apparel, has both a relatively low employment concentration and recent job decline.
- There are 12 related industries with fewer than 100 jobs in 2022 that were not included in this figure. Of these industries, 7 fall into the category of having low concentration as well as job loss.
- None of the industries in this cluster are categorized as “Emerging,” with relatively low concentration but recent job growth.

Industries included in the Figure:

- Footwear Manufacturing
- Textile Bag & Canvas Mills
- Broadwoven Fabric Mills
- Rope/Cordage/Twine/Tire Cord/Tire Fabric Mills
- All Other Misc. Textile Product Mills
- All Other Misc. Textile Product Mills
- Other Leather & Allied Product Manufacturing
- Curtain & Linen Mills
- Cut & Sew Apparel Manufacturing
- Footwear Merchant Wholesalers

DATA NOTE:

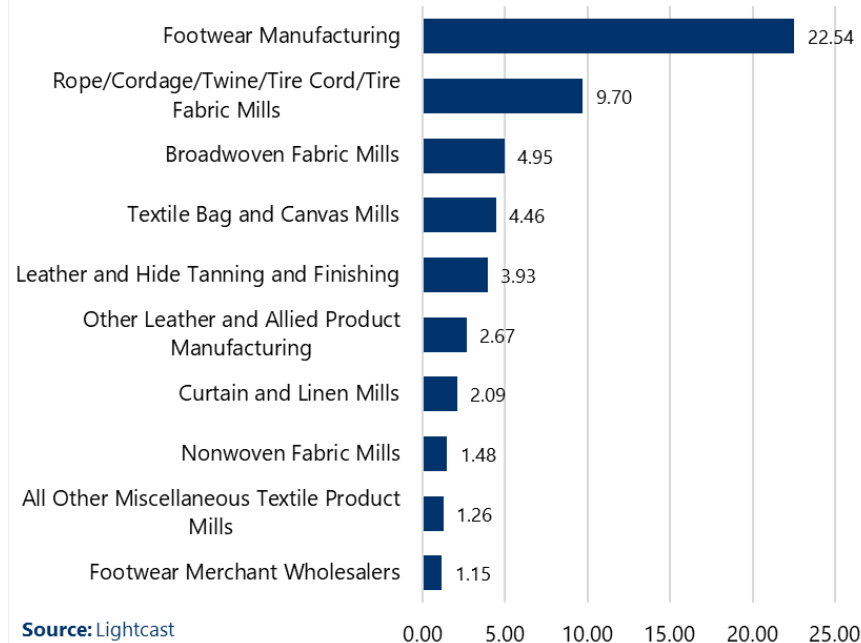
There are three performance measures in the chart above that combine to relate the competitiveness of this activity, (1) bubble size is size of industry by jobs, (2) vertical axis measures industry concentration in Maine, (3) horizontal axis measures recent jobs growth.

SUBSECTOR PERFORMANCE

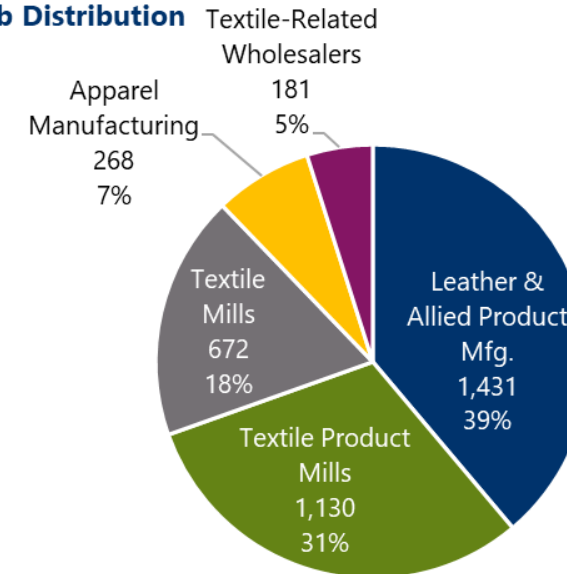
In 2022, Maine had 3,683 jobs in the Textiles Sector

- **Leather & Allied Product Manufacturing is the largest and most concentrated**, accounting for 39% of the sector's employment. This subsector has a location quotient of 9.14, meaning its employment is more than 9 times more concentrated in Maine than in the US on average; Footwear Manufacturing, which lies within this subsector, has an LQ of 22.54. This subsector accounts for nearly \$100 million in GRP annually. Although it is the largest subsector by employment, it declined by 489 jobs, or 25% from 2017-2022. Its competitive effect of -351 indicates that the subsector contracted by 351 jobs more than expected given national and industry trends.
- Maine has a relative concentration in Textiles. Jobs in the sector are more concentrated in Maine than in the US. This is the case for the Textile Mills, Textile Product Mills, and Leather and Allied Product Manufacturing subsectors. Other than Footwear Manufacturing, the most concentrated industries in the sector include Rope & related products manufacturing, Broadwoven Fabric Mills, Textile Bag/Canvas Mills, Leather and Hide Tanning and Finishing, and more.

Most Concentrated Industries in Textiles Sector (2022)



2022 Job Distribution



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.

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

SUBSECTOR PERFORMANCE

Summary Metrics for the Textiles Sector

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022
	Textile Mills	1140	672	(468)	(41%)	\$59,924	1.40	(318)	27
	Textile Product Mills	1,025	1,130	105	10%	\$57,245	2.46	174	62
	Apparel Manufacturing	297	268	(28)	(10%)	\$46,017	0.83	21	14
	Leather and Allied Product	1,920	1,431	(489)	(25%)	\$58,144	9.14	(351)	31
	Textile-Related Wholesalers	259	181	(78)	(30%)	\$72,075	0.28	(75)	35
	Total for Maine	4,641	3,683	(958)	(21%)	\$57,993	1.71	(551)	169
	Total for United States	564,956	504,495	(60,461)	(11%)	\$71,618	N/A	N/A	33,602

Source: Lightcast

Continued: Summary Metrics for the Textiles Sector

NAICS	Description	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
	Textile Mills	\$112,870,193	\$80,808,018	\$180,213,031	\$64,426,802	\$95,855
	Textile Product Mills	\$96,048,767	\$60,735,814	\$202,502,320	\$84,647,211	\$74,882
	Apparel Manufacturing	\$53,593,394	\$46,466,289	\$33,805,341	\$16,102,172	\$59,982
	Leather and Allied Product	\$32,974,082	\$16,446,155	\$413,056,604	\$99,877,112	\$69,793
	Textile-Related Wholesalers	\$220,862,306	\$208,688,665	\$68,410,914	\$41,011,083	\$226,792
	Total for Maine	\$516,348,743	\$413,144,941	\$897,988,210	\$306,064,381	\$83,105
	Total for United States	\$128,920,121,740	N/A	\$147,561,572,738	\$69,129,417,991	\$137,027

Source: Lightcast

- **Textile Product Mills** is the only subsector that saw employment growth from 2017-2022, gaining 105 jobs (+10%). As the second-largest subsector, it contributed \$84.6 million to the state's GRP in 2022, and its employment is 2.5 times more concentrated in Maine than in the US.
- **Textile Mills** saw a significant job decline from 2017-2022, shrinking from 1,140 jobs to 672 jobs (-41%) over the 5-year period. This subsector saw jobs decline nationally over this period, though Maine's declined faster, indicated by its negative competitive effect of 318 jobs. In 2022, it contributed over \$64.4 million of GRP to the state's economy.
- **Apparel Manufacturing** makes up a relatively small subsector in Maine, with 268 jobs in 2022. Its average earnings are the lowest of the Textiles subsectors, at \$46,017 annually.
- **Related Wholesalers** accounted for 181 jobs in 2022, the smallest subsector in Maine's Textiles sector. However, the subsector had the highest average earnings per job in 2022, at about \$72,000 per year.
- Overall, the Textiles sector in Maine saw a significant job decline in the last five years and has declined at a faster pace than the US. It has relatively low average earnings compared to the state's overall average and compared to national earnings in the sector. However, opportunities exist to adapt to changing conditions and improve sector performance in Maine.

Industry Demand and Purchases

Where is Maine's Textiles sector buying from?

PURCHASING INDUSTRIES

Industries Maine Textiles Purchases From

Top 25 Industries the Textiles Sector Purchases From (2022)

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
551114	Corporate, Subsidiary, and Regional Managing Offices	\$18,363,995	64.1%	\$10,276,469	35.9%	\$28,640,465
493110	General Warehousing and Storage	\$10,849,606	44.5%	\$13,521,256	55.5%	\$24,370,863
311611	Animal (except Poultry) Slaughtering	\$1,132,706	7.0%	\$15,142,631	93.0%	\$16,275,336
311612	Meat Processed from Carcasses	\$516,161	3.2%	\$15,514,361	96.8%	\$16,030,523
325220	Artificial and Synthetic Fibers and Filaments Manufacturing	\$0	0.0%	\$13,066,364	100.0%	\$13,066,364
325211	Plastics Material and Resin Manufacturing	\$1,286,496	10.9%	\$10,526,831	89.1%	\$11,813,326
313310	Textile and Fabric Finishing Mills	\$624,213	6.6%	\$8,824,642	93.4%	\$9,448,855
524210	Insurance Agencies and Brokerages	\$8,031,286	93.4%	\$564,553	6.6%	\$8,595,839
313110	Fiber, Yarn, and Thread Mills	\$1,384,826	18.3%	\$6,190,876	81.7%	\$7,575,702
424690	Other Chemical and Allied Products Merchant Wholesalers	\$2,284,233	35.1%	\$4,218,857	64.9%	\$6,503,090
541990	All Other Professional, Scientific, and Technical Services	\$4,799,114	77.4%	\$1,399,654	22.6%	\$6,198,768
332710	Machine Shops	\$1,615,724	26.4%	\$4,508,286	73.6%	\$6,124,010
484121	General Freight Trucking, Long-Distance, Truckload	\$3,695,594	67.8%	\$1,756,020	32.2%	\$5,451,614
424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	\$2,685,548	51.7%	\$2,506,296	48.3%	\$5,191,845
518210	Data Processing, Hosting, and Related Services	\$1,208,020	23.6%	\$3,918,429	76.4%	\$5,126,448
424910	Farm Supplies Merchant Wholesalers	\$755,501	15.1%	\$4,237,121	84.9%	\$4,992,622
325212	Synthetic Rubber Manufacturing	\$1,717,596	34.4%	\$3,269,116	65.6%	\$4,986,712
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$245,879	4.9%	\$4,727,457	95.1%	\$4,973,335
424350	Clothing and Clothing Accessories Merchant Wholesalers	\$100,573	2.1%	\$4,720,378	97.9%	\$4,820,951
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	\$2,959,287	62.5%	\$1,775,428	37.5%	\$4,734,715
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	\$397,704	8.6%	\$4,249,675	91.4%	\$4,647,379
112000	Animal Production	\$763,837	16.5%	\$3,866,936	83.5%	\$4,630,773
541330	Engineering Services	\$3,486,251	78.0%	\$984,525	22.0%	\$4,470,776
313320	Fabric Coating Mills	\$700,788	16.4%	\$3,567,006	83.6%	\$4,267,795
334413	Semiconductor and Related Device Manufacturing	\$1,239,607	32.3%	\$2,595,366	67.7%	\$3,834,973

Source: Lightcast

Note: Industries that are **bolded** indicate that they are included in the overall Textiles sector

- The top 25 purchasing sectors make up 47% of total purchases, **indicating that purchases that the sector makes are spread broadly throughout the economy.**
- **Corporate, Subsidiary, and Regional Managing Offices are the largest supplier to the sector.** This industry is made up of establishments such as headquarters or corporate offices that handle centralized administration of companies. These offices cut across multiple industries. In total, 64.1% of the total \$28.6M of purchases in 2022 were made from in-state entities.
- **There is little intra-industry interaction within suppliers. Of the top 25 supplying industries, only 4 are within the Textiles sector.** Instead, other industries relating to animal production and processing (for leather), Logistics (Warehousing, Freight Trucking), other raw inputs manufacturing (fibers, plastics and resin, synthetic rubber, chemicals, etc.) as well as services (engineering, professional services, insurance, etc.) make up the bulk of the sector's largest inputs.
- There is an opportunity for Maine to source more of its inputs from in-state sources. Sourcing leather from Maine producers for animal production, slaughtering, and meat processing industries, which currently rely almost completely on imports, is an opportunity to improve the supply chain and retain production capacity in the state. Other logistical inputs, such as warehousing, could be expanded within the state to support the sector.

DATA NOTE:

This table gives greater insight into supply chain gaps within the Textiles 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.

DEMAND COMPARISON

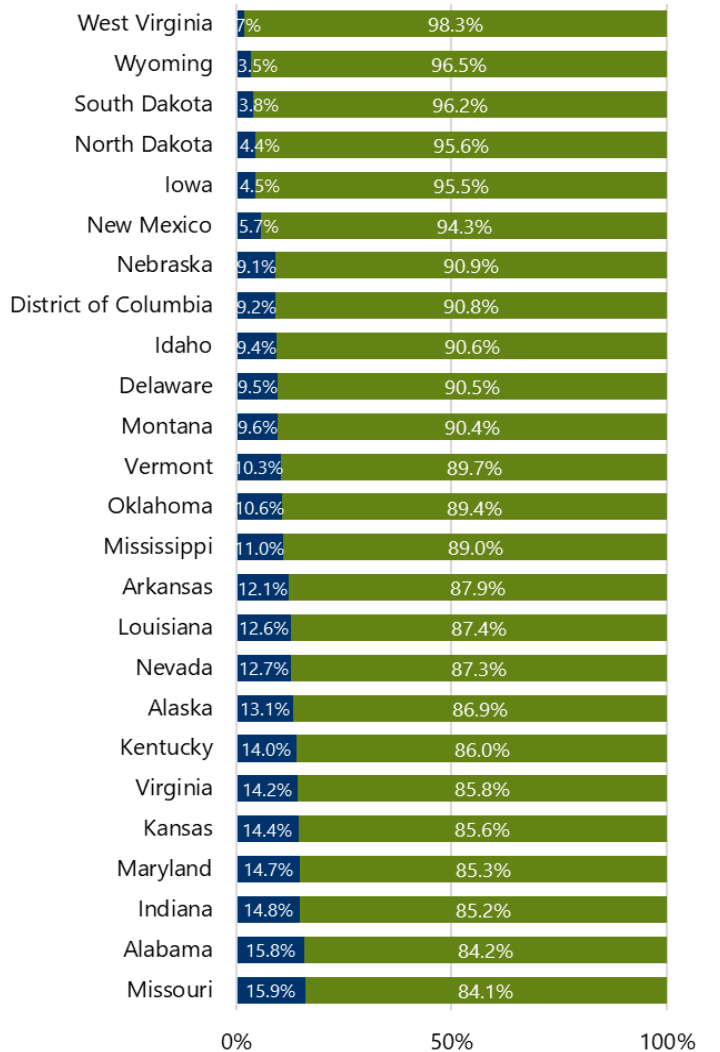
Top 10 States by Total Demand for Textiles Sector, 2022

	Payrolled Business Locations		% Demand met in-region		% Demand met by imports		Total Demand
	Locations	Demand met in-region	met in-region	Demand met by imports	met by imports		
California	7,803	\$11,738,398,587	71.1%	\$4,773,358,584	28.9%	\$16,511,757,171	
New York	3,904	\$4,654,773,259	56.7%	\$3,554,214,827	43.3%	\$8,208,988,085	
Florida	2,176	\$2,814,183,231	40.8%	\$4,082,895,588	59.2%	\$6,897,078,819	
Texas	2,030	\$3,650,423,725	33.0%	\$7,401,835,530	67.0%	\$11,052,259,255	
North Carolina	1,391	\$2,088,975,016	49.8%	\$2,107,807,976	50.2%	\$4,196,782,992	
New Jersey	1,246	\$1,121,212,398	28.8%	\$2,768,844,832	71.2%	\$3,890,057,230	
Georgia	1,229	\$2,382,627,325	51.6%	\$2,234,280,578	48.4%	\$4,616,907,903	
Illinois	1,000	\$1,460,930,606	28.5%	\$3,656,744,116	71.5%	\$5,117,674,722	
Ohio	724	\$937,464,494	20.3%	\$3,672,098,680	79.7%	\$4,609,563,174	
Pennsylvania	720	\$1,091,912,294	22.5%	\$3,759,679,911	77.5%	\$4,851,592,205	

Source: Lightcast

- **Maine ranks 40th among all states for total demand**, at \$516.3 million in 2022.
- The states with the highest overall demand for the sector’s products tend to be those with the largest economies in the nation. These states also meet high shares of their demand in-state.
- **The largest importer of the Textiles sector is West Virginia**, with 98.3% of total demand being met by imports in 2022.
- **Maine ranks 29th overall for percent of demand met by imports**, ranking slightly above than the national median.
- **The West North Central (SD, ND, IA, NE, KS, MO), Mountain Region (WY, NM, ID, MT, NV), and South Atlantic (WV, DC, DE, VA, MD) make up the bulk of states with the highest shares of demand met by imports**
- **The states with the largest share of demand met by imports have relatively small demand for the sector overall.** *The top 10 states by percent demand met by imports all rank in the bottom half for total demand, and six rank 40th or lower.*

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



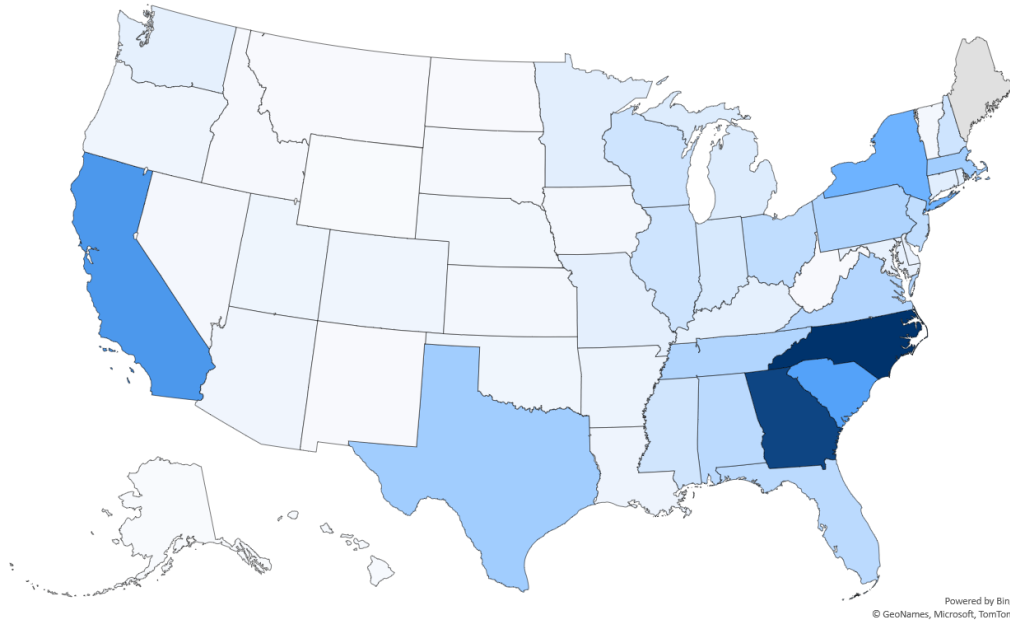
Source: Lightcast

■ % Demand Met In-Region ■ % Demand Met by Imports

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.

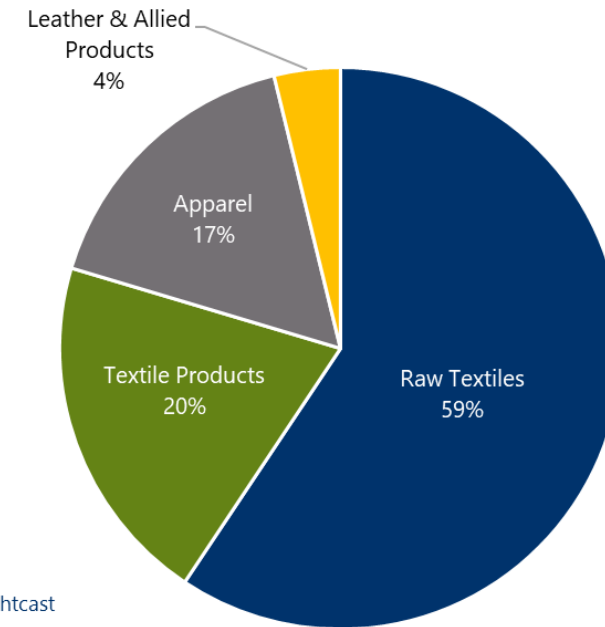
DOMESTIC IMPORTS TEXTILE PRODUCTS

Top Out-of-State Suppliers of Textile Products to Maine (2021)



Source: IMPLAN Data Library

Import Summary for Textile Commodities



Source: Lightcast

Maine imported Textile products from every state in 2021.

- **North Carolina was the largest overall supplier of the Sector's commodities to Maine in 2021, with over \$49 million in trade value.** Other important state suppliers were Georgia, California, South Carolina, and New York.
- **Raw textiles was the largest commodity group imported in 2021,** accounting for 59% of textile imports. The largest single commodity in this category was nonwoven fabrics, accounting for \$61.9 million of imports in 2021. North Carolina was the largest supplier of these products in 2021.
- **Textile products account for about 20% of total Sector imports. Rope, cordage, twine, tire cord, and tire fabric** was the most-imported commodity by trade value, with about \$22.6 million in 2021. North Carolina, New York, Texas, Massachusetts, and Florida were the largest suppliers of this commodity to Maine in 2021.
- **Apparel accounted for another 17% of imports in 2021.** Approximately one-third of domestic apparel imports were for **Women's and girls cut and sew apparel.** California & New York supplied the most apparel to Maine in 2021.
- Imports of Textile products **have declined over the last decade, decreasing an annual rate of 3% from 2011-2021.**

DEMAND & IMPORTS



TOTAL DEMAND (2022)

Maine: \$516.3 Million
United States: \$128.9 Million

Source: Lightcast, US Census Bureau



MET BY IMPORTS (2022)

Maine: \$413.1
United States: N/A

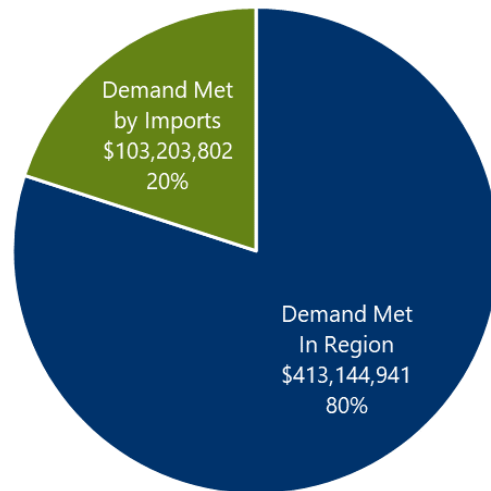


FOREIGN IMPORTS (2022)

Maine: \$609.8 Million
United States: \$194.3 Billion

- The Textiles Sector had a total demand of \$516.3 million in 2022, of which 80% (\$413.1 million) is met by in-state sources.
- According to US Census data, the foreign import value of the sector is \$609.8 million. Foreign imports of textiles account for approximately 7.4% of all foreign imports to Maine in 2022.
- Apparel is by far the largest import, with over \$277.1 million imported in 2022.
- Footwear is the second-most imported product of the sector, at \$187.2 million in 2022.
- Top countries that Maine imports textiles from are Vietnam, China, Burma, and Cambodia.

Total Textile Demand



Source: Lightcast

Top Imports of the Textiles Sector (2022)

Commodity	Customs Value (\$US)	Share of Total Foreign Imports in All Sectors
3152 Apparel	\$277,150,572	3.4%
3162 Footwear	\$187,169,662	2.3%
3141 Textile Furnishings	\$57,297,606	0.7%
3132 Fabrics	\$29,265,204	0.4%
3169 Other Leather Products	\$25,254,510	0.3%
3149 Other Textile Products	\$17,716,752	0.2%
3159 Apparel Accessories	\$6,292,174	0.1%
3131 Fibers, Yarns & Threads	\$3,777,109	0.0%
3151 Knit Apparel	\$3,739,683	0.0%
3133 Finished & Coated Textile Fabrics	\$1,208,818	0.0%
3161 Leather & Hide Tanning	\$937,114	0.0%
Total	\$609,809,204	7.4%

Source: USA Trade Online

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.

Foreign imports data is derived from a different source compared to demand and sales data, which may lead to discrepancies between the two data points.

Industry Sales and Exports

Where is Maine's Textiles sector selling to?

SALES INDUSTRIES Industries Maine Textiles Sells To

Top 25 Industries the Textiles Sector Sells To In Maine (2022)

NAICS	Sales to	Total In-Region Sales
322291	Sanitary Paper Product Manufacturing	\$4,749,959
322120	Paper Mills	\$3,523,085
316210	Footwear Manufacturing	\$2,964,748
455211	Warehouse Clubs and Supercenters	\$2,453,590
623210	Residential Intellectual and Developmental Disability Facilities	\$1,775,873
721110	Hotels (except Casino Hotels) and Motels	\$1,737,719
314910	Textile Bag and Canvas Mills	\$1,293,835
336612	Boat Building	\$1,270,710
313210	Broadwoven Fabric Mills	\$1,006,593
902999	State Government, Excluding Education and Hospitals	\$982,480
455219	All Other General Merchandise Retailers	\$929,329
623220	Residential Mental Health and Substance Abuse Facilities	\$922,977
455110	Department Stores	\$910,087
622110	General Medical and Surgical Hospitals	\$866,899
324121	Asphalt Paving Mixture and Block Manufacturing	\$635,832
111000	Crop Production	\$600,538
624120	Services for the Elderly and Persons with Disabilities	\$529,702
623110	Nursing Care Facilities (Skilled Nursing Facilities)	\$526,164
313230	Nonwoven Fabric Mills	\$502,649
722511	Full-Service Restaurants	\$475,771
458110	Clothing and Clothing Accessories Retailers	\$460,275
903999	Local Government, Excluding Education and Hospitals	\$436,879
424210	Drugs and Druggists' Sundries Merchant Wholesalers	\$434,592
315250	Cut and Sew Apparel Manufacturing (except Contractors)	\$420,670
316990	Other Leather and Allied Product Manufacturing	\$404,981

Source: Lightcast

Note: Industries that are bolded indicate that they are included in the overall Sector

- **Sanitary Paper Product Manufacturing** is the largest in-region buyer of the sector's goods and services. It accounted for over \$4.7 million of in-region sales, or 4.9% of the total. This industry encompasses manufacturing facilities that make products like toilet paper, paper towels, diapers, or menstrual products. These businesses likely consume raw textile fibers such as cotton or rayon as an intermediate good that is used to manufacture final products.
- **Seven of the top 25 industries are within the Textiles Sector**, indicating moderate intra-industry activity in the supply chain.
- **Textile manufacturers and wholesalers play an important role in supplying critical healthcare and social services industries in Maine**, such as residential facilities, hospitals, nursing care facilities and services for the elderly, and more.
- Additionally, **textile production plays a key role in providing inputs to other heritage industries in Maine**, such as paper manufacturing, boat building, and agriculture.

DATA NOTE:

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

SALES & EXPORTS



TOTAL SALES (2022)

Maine: \$898.0 Million
United States: \$147.6 Billion

Source: Lightcast, US Census Bureau



EXPORTED SALES (2022)

Maine: \$791.6 Million
United States: N/A

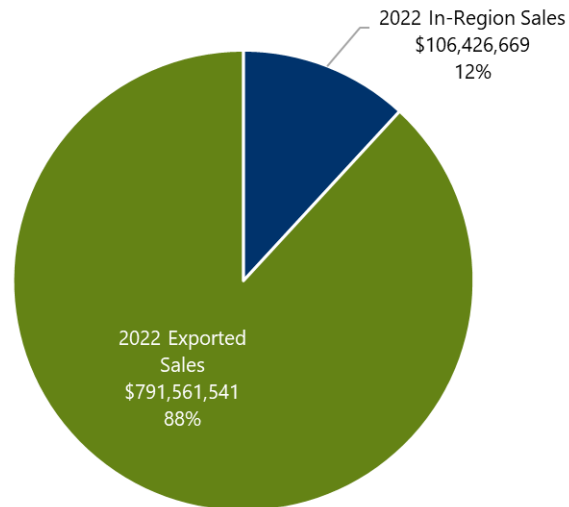


FOREIGN EXPORTS (2022)

Maine: \$62.5 Million
United States: \$23.4 Billion

- Textiles in Maine had total sales of \$898.0 million in 2022, of which 88% were exported out of state (\$791.6 million). Textiles is a highly exported sector in Maine's economy.
- Foreign exports were valued at \$62.5 Million in 2022 based on US Census data, suggesting foreign exports account for approximately 7.0% of total exports for the sector.
- Overall, Textile products account for 1.8% of all foreign exports leaving Maine in 2022. Top exports for the sector are detailed in the table below.

Total Textile Sales (2022)



Source: Lightcast

Top Exports of the Textiles Sector (2022)

Commodity	Customs Value (\$US)	Foreign Share of Total Sector Exports	Share of Total Foreign Exports in All Sectors
3149 Other Textile Products	\$14,268,531	1.6%	0.4%
3132 Fabrics	\$14,065,917	1.6%	0.4%
3141 Textile Furnishings	\$10,266,504	1.1%	0.3%
3169 Other Leather Products	\$7,592,465	0.8%	0.2%
3131 Fibers, Yarns & Threads	\$5,290,302	0.6%	0.2%
3133 Finished & Coated Textile Fabrics	\$3,766,435	0.4%	0.1%
3162 Footwear	\$3,699,684	0.4%	0.1%
3159 Apparel Accessories	\$1,792,999	0.2%	0.1%
3152 Apparel	\$1,570,039	0.2%	0.0%
3161 Leather & Hide Tanning	\$124,345	0.0%	0.0%
3151 Knit Apparel	\$33,136	0.0%	0.0%
Total	\$62,470,357	7.0%	1.8%

Source: USA Trade Online

DATA NOTE:

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

EMERGING OPPORTUNITIES

Industrial applications through innovation

Innovation strengthens Maine's position in the textiles sector. Collaboration with research at the University of Maine provides new opportunities for Maine businesses to develop, manufacture, and market new, better products.

Connection to UMaine

Maine's textiles producers and employers have benefitted from collaboration with the University of Maine in multiple ways. The Advanced Manufacturing Center provides companies with an opportunity to develop new products, while other programs such as the Innovate for Maine Fellows Program, provide a pipeline of undergraduate interns and future full-time employees to the Textiles sector.

Fiber arts, design, and Maine retail/quality brand

Maine's well-known brand and legacy as a textile producer can be utilized to promote the future development of the sector. Specialized, handmade, and artisan products can be marketed to compete with products that are lower quality but cheaper for foreign producers to make.

Rising demand for sustainably made and ethically sourced products helps US-based producers

Due to rising concerns for climate change, environmental concerns, and increasing awareness of labor conditions, consumers are increasingly demanding greener, more eco-friendly products, particularly for apparel. This includes the use of greener products such as organic fibers as well as the implementation of fair labor standards. Under conditions of tight price competition from low-cost international competitors, producers in the United States and Maine have an opportunity to access new markets of consumers willing to pay more for products in exchange for the knowledge that those products were created ethically.

RECENT INVESTMENTS & DEVELOPMENTS

New Balance expands Skowhegan operations

New Balance invested \$65 million to expand footwear manufacturing in its existing Skowhegan factor, expecting to double its production of athletic footwear to one million pairs per year. The investment is estimated to create 200 direct jobs in the community, nearly doubling its existing workforce in the area.

Spirit AeroSystems acquires Biddeford-based Fiber Materials, Inc (FMI)

In 2020, the Wichita-based aerospace manufacturer purchased FMI, which manufactures high-temperature composites and 3D-woven high-temperature materials used in aerospace applications. According to [SEC archives](#), the company was purchased for \$121.6 million.

The Maine Jobs and Recovery Plan invested approx. \$3 million into Maine textile companies via the Pandemic Recovery for an Innovative Maine Economy (PRIME) grant program

The PRIME Fund, administered by the Maine Technology Institute, was established to distribute \$39 million in funding to Maine businesses to help recover from the COVID-19 pandemic through development and innovation. Ten awardees in Phase I were to Maine textile companies. A table containing details of PRIME investments of over \$100,000 to textile businesses can be found in the appendix.

Apparel and Footwear Manufacturer Origin procures 100 acres to expand factory operations and more in Farmington

The company, which currently has apparel and footwear factories in Farmington and a headquarters for nutritional products in Wilton, will use the land to develop a campus, with a vision to include a factory as well as other destinations such as visitor attractions, an indoor sports complex and community events venue, a restaurant, and a distillery and/or brewery.

Auburn Manufacturing, INC named 2023 “Exporter of the Year” by the Export-Import Bank of the United States

The bank (EXIM), which is the official export credit agency of the US federal government, honored AMI as one of its 2023 exporters of the year in November. AMI, which manufactures advanced textiles for extreme-heat environments, is based in Mechanic Falls with a manufacturing plant in Auburn. In recent years, the company has been recognized for its efforts to confront Chinese “dumping” and unfair trade practices. President Joe Biden visited the Auburn plant in July 2023. The company exports products to over 30 countries across the globe.

MAINE COMPANIES WITHIN THE INDUSTRY

American Roots

American Roots is a Westbrook-based apparel manufacturing, with all manufacturing processes from fiber harvesting and dying to final product manufacturing completed at the Maine factory. Additionally, American Roots along with Old Port Wool and Textile developed the Common Threads of Maine program, which is a training program for stitchers. Common Threads provides a critical workforce development service for the Textiles industry.

Auburn Manufacturing

Based in Mechanic Falls, Auburn Manufacturing is an industry leader in heat-resistant fabrics and textiles. AMI manufactures all products in Maine and has recently been recognized for its work to overcome illegal foreign import practices.

New Balance

Headquartered in Boston, New Balance holds almost 14% of the United States footwear market. It has production facilities in Skowhegan, Norway, and Norridgewock.

Origin

Headquartered in Farmington, the company manufactures performance and outdoor gear among other textile products. Origin manufactures products in 4 facilities, with a major planned expansion in Farmington.

Spirit AeroSystems (FMI)

Headquartered in Wichita Kansas, Spirit AeroSystems operates Biddeford's Fiber Materials Inc. (FMI). FMI specializes in high-temperature materials and composites used primarily in the Defense industry, including 3D woven materials used on missiles. The company's products are currently utilized on multiple military spacecraft as well as NASA programs including Stardust, Mars Curiosity, Orion, and Mars 2020.

TexTech

With corporate headquarters in North Carolina and manufacturing facilities in various locations across the US and the UK, TexTech has 2 Maine manufacturing facilities, in North Monmouth and Winthrop. TexTech produces materials used across multiple industries including aerospace and defense, medical, protective apparel, automotive, and other high-performance materials.

US Felt

Located in Sanford, US felt is a manufacturer of nonwoven fabrics, felt, and composite materials. The company also provides thermoplastics injection molding and mold maintenance, custom printing, product storage, and product fulfillment. US felt provides materials for a range of applications across industries and can develop and engineer products on a custom basis.

TRADE SHOWS & MEETINGS

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

Advanced Textiles Expo

The Advanced Textiles Expo, previously known as the IFAI Expo is the flagship show for the textile industry. It attracts more than 4,000 attendees, providing a perfect platform for exhibitors like yourself to network, showcase products, and strike profitable business deals. Organized by the Advanced Textiles Association (ATA), the expo is well-regarded for featuring leading companies from the industry. This trade show allows you to have live product demonstrations, gain immediate feedback, and foster engaging customer interactions. Moreover, the expo's social events offer opportunities for informal networking, making it easier to build lasting business relationships. Exhibiting at this expo not only enhances your brand visibility and keeps your business at the forefront of industry trends.

Heimtextil

International trade fair for home and contract textiles - The internationally unique platform for home and contract textiles and textile design. Experience the trends of the season, textile sustainability, the world's largest range of home textiles as well as product and information offers for interior design, hospitality and the megatrend sleep. Throughout the four days of the event in mid-January, the trade fair serves as a business and information platform for manufacturers, retailers and designers from around the world. By presenting bed, bath and table linens as well as floor and window coverings, upholstery and sun protection systems, Heimtextil covers the entire home and household textiles portfolio from across the globe.

Interwoven Textile Fair by ITA

ITA hosts and produces the premier global event dedicated to bringing together all segments of the textile industry: Interwoven Textile Fair by ITA. Held twice a year in May and November in High Point, N.C., the internationally acclaimed Interwoven offers the most comprehensive fabric, leather and trim presentations. ITA member companies host more than 600 buying companies during each event. Typical exhibitors schedule an average of 100+ appointments during the week, making the market a strategic and cost-effective venue for showing and viewing fabrics. Throughout the market, ITA also offers a variety of networking, social and educational events designed to support its member organizations and their colleagues.

TRADE SHOWS & MEETINGS

ITMA

Held every 4 years, ITMA is known as the textile and garment technology industry's "Olympics." It is the world's largest international textile and garment technology exhibition, showcasing technologies that will assist textile and garment manufacturers in transforming and growing their businesses. ITMA is the location to meet important decision-makers from the world's top textile and garment companies and leading brand owners, acquire market intelligence, and form collaborative connections with a worldwide audience in attendance. ITMA, which is owned by CEMATEX, brings the industry together every four years to show off the latest textile and garment processing technologies, machinery, and materials, as well as foster collaborations and partnerships.

Techtextil North America

Techtextil North America focuses on industries such as automotive, aerospace, medical, construction, and many more. The fair presents a wide range of products and services, including technical textiles, nonwovens, fibers, yarns, and coating technologies.

Texprocess Americas

Equipment and Technology for the Development, Sourcing, and Production of Sewn Products - Held every two years, Co-produced by SPESA, Texprocess Americas, co-produced by SPESA, creates an opportunity for retail, brand, manufacturing executives, and professionals involved in the sewn products industry to meet with leading international manufacturers and distributors of machinery, equipment, parts, supplies, systems, technology, supply chain solutions, and other products and services used for the development of sewn products.

TEXWORLD EVOLUTION NYC

Texworld is a twice-yearly event that takes place mainly in Paris, New York, and Istanbul. Messe Frankfurt is in charge of the event, a fantastic opportunity to network with the industry's leading buyers and designers. Texworld is a clothing, fabric, and material exhibition that amazes with creative structures, material combinations, and color palettes. The expo provides visitors and exhibitors with a flood of the latest trends and the option to test and feel all materials, making this event a sensual experience.

TRADE SHOWS & MEETINGS

Footwear-Specific Tradeshows

Footwear Show New York (FSNYE) Held During FFANY

The Fashion Footwear Association of New York (FFANY) is a not-for-profit association representing footwear manufacturers globally. This annual show includes juried collections and Salon & Bridge Markets of contemporary footwear for the discriminating buyer. The essential venue for premier fashion footwear. Footwear Show New York Expo (FSNYE) is held during FFANY Market Week for 3 days and showcases a global audience of influential footwear brands, retailers, and media.

Futurmoda

Futurmoda is the only international footwear component show conducted twice a year in Spain, particularly in Elche, the province of Alicante, with Europe's oldest footwear manufacturing legacy. Futurmoda is an international exhibition of leather products, components, and machinery for the footwear and leather industry. It has become a must-attend event for both industry professionals and companies eager to learn about the newest innovations and fashion trends and make key business connections.

Lineapelle New York

LINEAPELLE NEW YORK is held twice a year at the Metropolitan Pavilion in Chelsea, heart of New York City's contemporary art district. The two-day event boasts the participation of the most exclusive European and International producers of leather, textiles and synthetics, components and hardware for shoes, handbags and leather goods, leatherwear, upholstery and car interiors. US version of the Italian-based international trade show for the leather goods sector.

Dallas Apparel & Accessories Market

The Dallas Apparel & Accessories Market is a trade show that takes place several times a year in Dallas, Texas. It is a major event in the fashion industry, attracting buyers, sellers, and other industry professionals worldwide. The market offers a wide selection of clothing and accessories, including apparel, handbags, jewelry, and more. Fashion companies and designers can present their most recent collections to a sizable and varied audience. They can also connect with potential customers and partners at the trade show. It offers attendees the chance to discover new trends and products and network with other industry professionals. Whether you are a fashion retailer, a designer, or simply someone who loves fashion, the Dallas Apparel & Accessories Market is one of the must-attend fashion trade shows.

OTHER RESOURCES

Common Threads (commonthreadsmaine.org)

Common Threads promotes fulfilling careers in the Maine textile industry by teaching people to become skilled stitchers, advocating for fair treatment in the workplace, and assisting business development. Since 2015, over 180 students have been trained to become skilled industrial stitchers and have helped connect over 85% to good-paying jobs with local employers. Participants also gain new workplace skills such as improved English and math skills.

Maine Fiberarts (mainefiberarts.org)

Maine Fiberarts supports the Maine fiber community by hosting exhibitions, organizing studio tours, representing work to the public, maintaining a presence at art and agricultural fairs, and providing networking opportunities. Membership is available to artists, producers, shops, and more.

- **Fiber Folio (Mainefiberfolio.com):** Fiber Folio advances fiber art, craft, farms, schools, and businesses both within Maine and beyond. It is a project that serves as a living journal of Maine art and farms. It also provides information about where to find and support fiber art businesses in Maine.

Maine Manufacturing Extension Partnership (mainemep.org)

The most comprehensive resource available for manufacturers in Maine. Whether working with high-tech companies or start-up artisans, Maine MEP forges close and collaborative relationships with clients to meet their particular needs, helping small businesses grow.

Manufacturers Association of Maine (MAME) (mainemfg.com)

Provides business development, member services, Manufacturing Career Connections (MCC) and networking and events. Their focus is offering members value-added services such as legislative advocacy, scholarship programs, career connections for students and job seekers and networking opportunities and events.

APPENDIX

Summary Metrics for the Textiles Sector

NAICS	Description	Jobs 2017	Jobs 2022	Jobs Change 2017-2022	Jobs Change % 2017-2022	Avg. Earnings Per Job 2022	Location Quotient 2022	Competitive Effect 2017-2022	Payrolled Business Locations 2022	Total Demand 2022	Demand met by Imports 2022	Total Sales 2022	GRP 2022	GRP per Job
Textile Mills		1140	672	(468)	(41%)	\$59,924	1.40	(318)	27	\$112,870,193	\$80,808,018	\$180,213,031	\$64,426,802	\$95,855
313110	Fiber, Yarn, and Thread Mills	83	41	(43)	(51%)	\$46,633	0.37	(32)	8	\$18,717,138	\$15,462,893	\$10,835,035	\$2,689,052	\$66,365
313210	Broadwoven Fabric Mills	626	456	(170)	(27%)	\$59,216	4.95	(37)	12	\$24,484,104	\$9,866,969	\$120,568,354	\$44,376,019	\$97,350
313220	Narrow Fabric Mills and Schiffli Machine Embroidery	15	29	14	94%	\$39,641	1.10	16	1	\$6,774,290	\$5,283,158	\$5,124,519	\$1,885,688	\$64,793
313230	Nonwoven Fabric Mills	281	97	(184)	(66%)	\$79,600	1.48	(198)	4	\$20,715,759	\$12,001,426	\$34,011,204	\$12,504,449	\$129,181
313240	Knit Fabric Mills	9	0	(9)	(100%)	\$0	0.00	(8)	0	\$5,486,371	\$5,486,371	\$0	\$0	\$0
313310	Textile and Fabric Finishing Mills	81	23	(58)	(72%)	\$47,248	0.27	(44)	1	\$25,288,214	\$23,447,254	\$4,318,642	\$1,326,356	\$57,687
313320	Fabric Coating Mills	44	27	(18)	(40%)	\$53,918	0.88	(15)	1	\$11,404,317	\$9,259,947	\$5,355,278	\$1,645,238	\$61,215
Textile Product Mills		1,025	1,130	105	10%	\$57,245	2.46	174	62	\$96,048,767	\$60,735,814	\$202,502,320	\$84,647,211	\$74,882
314110	Carpet and Rug Mills	135	28	(107)	(79%)	\$81,685	0.23	(95)	2	\$35,389,433	\$28,609,844	\$11,477,172	\$3,799,733	\$133,709
314120	Curtain and Linen Mills	78	162	85	109%	\$54,088	2.09	100	8	\$19,360,058	\$12,252,904	\$32,256,662	\$11,460,449	\$70,611
314910	Textile Bag and Canvas Mills	353	517	164	46%	\$55,954	4.46	158	31	\$17,390,453	\$6,573,936	\$85,548,123	\$37,382,494	\$72,297
314994	Rope, Cordage, Twine, Tire Cord, and Tire Fabric Mills	245	236	(9)	(4%)	\$70,806	9.70	26	8	\$4,238,204	\$211,353	\$49,556,974	\$21,663,890	\$91,862
314999	All Other Miscellaneous Textile Product Mills	215	187	(28)	(13%)	\$42,724	1.26	(15)	13	\$19,670,618	\$13,087,777	\$23,663,389	\$10,340,645	\$55,358
Apparel Manufacturing		297	268	(28)	(10%)	\$46,017	0.83	21	14	\$53,593,394	\$46,466,289	\$33,805,341	\$16,102,172	\$59,982
315120	Apparel Knitting Mills	0	12	12		\$49,475	0.35	12	1	\$3,246,569	\$2,992,633	\$1,297,314	\$593,242	\$49,782
315210	Cut and Sew Apparel Contractors	45	44	(2)	(3%)	\$31,228	0.32	11	2	\$13,204,448	\$11,630,525	\$4,438,232	\$2,117,541	\$48,366
315250	Cut and Sew Apparel Manufacturing (except Contractors)	184	148	(36)	(19%)	\$51,591	0.67	3	8	\$29,803,794	\$26,447,185	\$19,472,340	\$9,355,745	\$63,289
315990	Apparel Accessories and Other Apparel Manufacturing	68	65	(3)	(4%)	\$42,666	1.02	(5)	3	\$7,338,583	\$5,395,946	\$8,597,455	\$4,035,644	\$62,157
Leather and Allied Product Manufacturing		1,920	1,431	(489)	(25%)	\$58,144	9.14	(351)	31	\$32,974,082	\$16,446,155	\$413,056,604	\$99,877,112	\$69,793
316110	Leather and Hide Tanning and Finishing	180	71	(109)	(61%)	\$59,696	3.93	(84)	2	\$4,566,897	\$2,993,209	\$20,753,184	\$4,833,327	\$68,404
316210	Footwear Manufacturing	1,530	1,195	(335)	(22%)	\$58,109	22.54	(194)	14	\$13,416,637	\$4,441,845	\$345,256,649	\$83,635,062	\$69,983
316990	Other Leather and Allied Product Manufacturing	211	165	(45)	(22%)	\$57,732	2.67	(73)	15	\$14,990,547	\$9,011,101	\$47,046,771	\$11,408,723	\$69,015
Textile-Related Wholesalers		259	181	(78)	(30%)	\$72,075	0.28	(75)	35	\$220,862,306	\$208,688,665	\$68,410,914	\$41,011,083	\$226,792
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers	35	12	(23)	(65%)	\$200,716	0.12	(19)	8	\$31,328,614	\$27,592,307	\$14,619,179	\$8,747,985	\$706,891
424340	Footwear Merchant Wholesalers	150	121	(29)	(19%)	\$57,482	1.15	(33)	12	\$39,318,194	\$35,362,955	\$32,121,364	\$19,238,833	\$159,155
424350	Clothing and Clothing Accessories Merchant Wholesalers	74	48	(26)	(36%)	\$75,691	0.11	(23)	15	\$150,215,498	\$145,733,403	\$21,670,371	\$13,024,266	\$273,760
Total for Maine		4,641	3,683	(958)	(21%)	\$57,993	1.71	(551)	169	\$516,348,743	\$413,144,941	\$897,988,210	\$306,064,381	\$83,105
Total for United States		564,956	504,495	(60,461)	(11%)	\$71,618	N/A	N/A	33,602	\$128,920,121,740	N/A	\$147,561,572,738	\$69,129,417,991	\$137,027

Source: Lightcast

APPENDIX

Phase I PRIME Awards over \$100,000 to Maine Textile Businesses

Business Name	Town	Award Amount
The Montalvo Corporation	Gorham	\$386,667
Auburn Manufacturing, Incorporated	Mechanic Falls	\$360,000
Origin BJJ LLC	Farmington	\$360,000
Yale Cordage, Inc.	Saco	\$346,667
Hyperlite Mountain Gear Inc.	Biddeford	\$299,000
Lifethereal LLC / Flowfold	Gorham	\$280,000
Sea Bags, LLC	Portland	\$266,667
American Roots Wear, Inc.	Westbrook	\$226,667
Zootility Co.	Portland	\$200,000
Quoddy Inc.	Lewiston	\$190,000

Source: Maine Technology Institute, Maine Office of Business Development

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.

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

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

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

DATA SOURCES



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



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



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