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Maine's Biggest Industries; Structural Overview of the Maine Economy

Galen Rose
Maine State Planning Office
June 2004

Maine's Biggest Industries

One of the most frequently asked questions about the Maine economy is, "What are Maine's biggest industries?" This brief paper attempts to answer this question as well as provide some numbers for natural resource based industries and tourism.

First, we must decide what we mean by biggest industries; do we mean which industries employ the most people, or which provide the most income to people, or which contribute the most value added to the economy? Perhaps the most common measure is employment, so we will concentrate on that measure, but also provide raw data on the other common measures.

In terms of employment by major industry group, Maine differs very little from the nation as a whole, as can be seen in Figure 1, below. The significant differences are in the details.

Maine's Largest Industries 2003 (3-digit NAICS) (ranked by payroll employment)

Rank by Empl. Size

US	Maine	Maine Total	606.1
1	1	Food Services and Drinking Places	39.4
3	2	Hospitals	26.3
4	3	Ambulatory Health Care Services	23.5
5	4	Nursing and Residential Care Facilities	22.7
2	5	Administrative and Support Servs.	21.0
7	6	Food and Beverage Stores	19.3
8	7	Specialty Trade Contractors	18.4
9	8	Educational Services	17.9
11	9	Social Assistance	16.4
10	10	Insurance Carriers and Related	12.8

Sum of Largest 10 217.7

Largest 10 as % of Total 36%

However, what many people mean when they ask about Maine's largest industries is which are much bigger in Maine than in the nation, in percentage terms. In the table on the following page, some industries are in bold type. These are the industries which are "bigger" in Maine than in the nation, in the sense that in Maine a much larger percentage of all workers are in these industries than is the case nationwide; that is, the concentration of employment in these industries is at least two times (2X) the national norm. By this measure, Maine's biggest industries would be fishing (17X), leather manufacturing (16X), forestry (5X), paper manufacturing (4X), lumber and wood products manufacturing (3X), tourism (2X), and ship and boat building (2X).

But what about tourism? Tourism cuts across several industry codings, in retail, services, transportation, etc., and by the Federal Governments standard coding is not a distinct industry. However, since we know from annual surveys of travelers in Maine how much tourists spend (resident and non-resident) in various categories (\$6.2 billion in 2002) – and how many jobs are supported by that level of spending, we can approximate how many Maine jobs are supported by tourism. In 2001, we estimate, very roughly, that about 58,000 Maine jobs are supported by tourism. Thus, tourism can fairly be said to be Maine’s largest industry, and tourism-related employment is much more concentrated in Maine than in the nation.

As noted on the previous page, and in the following table, natural resource industries are very important in Maine.

Maine Natural Resource Employment	2002
Farm employment	10,500
Fishing, Hunting, Trapping	8,400
Forestry & Logging	6,100
Agricultural & Forestry Support Services	2,600
Total	27,600

If we include those industries which are directly dependent on natural resources , the total swells to 56,600. These industries are shown below:

Paper Mfg.	11,700
Wood Product Mfg.	7,800
Food Mfg.	7,100
Furniture Mfg.	2,400
Total	29,000

(source: US Bur. of Economic Analysis; total full- & part-time employment)

The next few pages provide measures of Maine industries by employment, Gross State Product (the value added to the economy by an industry), and Personal Income (the dollar volume of income received by people working in the industries). The last table is a list of Maine’s 50 largest private companies.

FULL- & PART-TIME EMPLOYMENT 2002	MAINE	US
Total employment	802,317	167,033,500
Farm employment	10,533	3,075,000
Forestry, fishing, related activities, and other 3/	17,068	1,015,800
Mining	471	778,600
Utilities	2,412	618,600
Construction	54,649	9,815,300
Specialty trade contractors	36,722	6,462,200
Other	17,927	3,353,100
Manufacturing	72,719	15,800,400
Durable goods manufacturing	38,691	9,799,100
Wood product manufacturing	7,838	625,100
Nonmetallic mineral product manufacturing	1,663	529,000
Primary metal manufacturing	439	513,400
Fabricated metal product manufacturing	5,191	1,605,200
Machinery manufacturing	2,676	1,263,500
Computer and electronic product manufacturing	4,773	1,512,300
Electrical equipment and appliance manufacturing	1,036	507,100
Motor vehicle manufacturing	606	1,152,800
Transportation equipment mfg. excl. motor vehicles	9,680	681,700
Furniture and related product manufacturing	2,359	640,800
Miscellaneous manufacturing	2,430	768,200
Nondurable goods manufacturing	34,028	6,001,300
Food manufacturing	7,137	1,583,800
Beverage and tobacco product manufacturing	445	209,700
Textile mills	2,159	295,100
Textile product mills	1,202	200,500
Apparel manufacturing	1,254	395,200
Leather and allied product manufacturing	2,951	58,500
Paper manufacturing	11,662	545,300
Printing and related support activities	2,978	770,100
Petroleum and coal products manufacturing	397	119,000
Chemical manufacturing	1,432	940,200
Plastics and rubber products manufacturing	2,411	883,900
Wholesale trade	22,836	6,163,000
Retail trade	106,895	18,384,900
Motor vehicle and parts dealers	11,895	2,114,200
Furniture and home furnishings stores	3,006	629,100
Electronics and appliance stores	2,229	592,900
Building material and garden supply stores	7,378	1,274,500
Food and beverage stores	20,794	3,103,600
Health and personal care stores	4,128	1,117,100
Gasoline stations	8,112	965,000
Clothing and clothing accessories stores	5,774	1,513,300
Sporting goods, hobby, book and music stores	5,419	853,600
General merchandise stores	12,390	2,953,600
Miscellaneous store retailers	11,355	1,655,000
Nonstore retailers	14,415	1,613,000
Transportation and warehousing	19,590	5,365,200
Truck transportation	7,614	1,632,400
Other	9,604	3,211,300
Warehousing and storage	2,372	521,500
Information	13,401	3,819,000
Finance and insurance	33,859	7,929,500
Real estate and rental and leasing	25,197	6,444,900
Professional and technical services	40,420	10,448,600
Management of companies and enterprises	6,434	1,772,000
Administrative and waste services	32,419	9,545,200
Educational services	14,883	3,136,400
Health care and social assistance	105,920	16,124,600
Ambulatory health care services	30,601	5,800,100
Hospitals	25,700	4,155,800
Nursing and residential care facilities	22,567	2,818,000
Social assistance	27,052	3,350,700
Arts, entertainment, and recreation	17,611	3,310,500
Accommodation and food services	54,586	10,938,200
Accommodation	12,769	1,909,300
Food services and drinking places	41,817	9,028,900
Other services, except public administration	40,266	9,201,800
Government and government enterprises	110,148	23,346,000
Federal, civilian	13,515	2,730,000
Military	9,186	1,954,000
State and local	87,447	18,662,000
State government	27,022	5,055,000
Local government	60,425	13,607,000

GROSS STATE PRODUCT 2001 (millions of current dollars)

	MAINE	US
Total Gross State Product	\$37,449	\$10,137,190
Private industries	32,052	8,918,169
Agriculture, forestry, and fishing	725	140,650
Farms	240	80,596
Ag. services, forestry, and fishing	486	60,054
Mining	5	139,040
Construction	1,723	480,013
Manufacturing	5,239	1,422,990
Durable goods	2,511	812,809
Lumber and wood products	444	39,199
Furniture and fixtures	169	25,023
Stone, clay, and glass products	61	36,697
Primary metal industries	48	45,144
Fabricated metal products	222	100,760
Industrial machinery and equipment	336	148,212
Electronic and other electric equipment \1	324	143,083
Motor vehicles and equipment	35	111,431
Other transportation equipment	797	71,429
Instruments and related products \1	38	61,653
Miscellaneous manufacturing	38	30,179
Nondurable goods	2,729	610,181
Food and kindred products	468	123,683
Tobacco products	0	21,126
Textile mill products	98	22,068
Apparel and other textile products	68	23,294
Paper and allied products	1,302	55,940
Printing and publishing	217	100,193
Chemicals and allied products	151	163,456
Petroleum and coal products	27	40,603
Rubber and misc. plastics products	181	56,551
Leather and leather products	217	3,268
Transportation and public utilities	2,518	819,464
Transportation	892	306,085
Trucking and warehousing	514	125,967
Other Transportation	378	180,118
Communications	734	291,462
Electric, gas, and sanitary services	892	221,916
Wholesale trade	2,198	680,683
Retail trade	4,481	931,756
Finance, insurance, and real estate	7,194	2,076,987
Depository institutions \2	967	359,900
Nondepository institutions \2	433	88,784
Security and commodity brokers	170	174,996
Insurance carriers	897	170,071
Insurance agents, brokers, and services	235	66,516
Real estate	4,457	1,171,677
Holding and other investment offices	35	45,043
Services	7,970	2,226,585
Hotels and other lodging places	361	88,429
Personal services	208	62,655
Business services \3	1,103	544,105
Auto repair, services, and parking	453	99,531
Miscellaneous repair services	121	26,950
Motion pictures	46	35,457
Amusement and recreation services	172	79,322
Health services	3,048	589,788
Legal services	384	145,562
Educational services	347	84,435
Social services	635	74,680
Membership organizations	171	63,043
Other services \3	873	320,749
Private households	48	11,881
Government	5,396	1,219,022
Federal, civilian	1,181	232,694
Federal military	418	101,204
State and local	3,797	885,124

(D) Not shown in order to avoid the disclosure of confidential information; estimates are included in higher level totals.

(L) Less than \$500,000 in nominal or real GSP.

Source: Bureau of Economic Analysis, U.S. Department of Commerce.

Personal Income in 2000

MAINE

Total Personal income (mil\$)	\$32,412
Earnings by Place of Work	\$21,989
Farm income 2/	\$134
Mining	\$4
Construction	\$1,589
Manufacturing	\$3,441
Transportation, Communicat'n and public utils	\$1,147
Wholesale trade	\$1,132
Finance, insurance, and real estate	\$1,489
Services	\$6,175
Government and government enterprises	\$4,008
Retail trade	\$2,575
Ag. services, forestry, fishing & other 9/	\$294
*Other Income	\$10,422

Earnings by Place of Work

1	Health services	\$2,368
2	Local Govt.	\$1,855
3	Special trade contractors	\$1,053
4	State Govt.	\$955
5	Federal, civilian Govt.	\$888
6	Business services	\$878
7	Paper and allied products Mfg.	\$749
8	Finance	\$692
9	Engineering and management services 13/	\$643
10	Transportation	\$620
11	Miscellaneous retail	\$619
12	Insurance	\$564
13	Eating and drinking places	\$527
14	Social services 12/	\$523
15	Food stores	\$445
16	Other transportation equipment Mfg.	\$436
17	Automotive dealers and service stations	\$428
18	Lumber and wood products Mfg.	\$376
19	Electronic and other electric equipment Mfg.	\$350
20	Legal services	\$321
21	General building contractors	\$316
22	Military (Govt.)	\$311
23	Educational services	\$299
24	Communications	\$273
25	Electric, gas, and sanitary Utilities	\$254
26	Real estate	\$233
27	Food and kindred products Mfg.	\$225
28	Heavy construction contractors	\$219
29	Auto repair, services, and parking	\$217
30	Industrial machinery and equipment Mfg.	\$213
31	Hotels and other lodging places	\$212
32	General merchandise stores	\$208
33	Printing and publishing (mfg)	\$206
34	Building materials and garden equipment	\$166
35	Membership organizations	\$165
36	Personal services	\$163
37	Leather and leather products Mfg.	\$152
38	Agricultural services	\$141
39	Fabricated metal products Mfg.	\$133
40	Amusement and recreation services	\$127
41	Fishing	\$126
42	Textile mill products Mfg.	\$107
43	Home furniture and furnishings stores	\$104
44	Rubber and misc. plastics products Mfg.	\$103
45	Chemicals and allied products Mfg.	\$89
46	Miscellaneous repair services	\$88
47	Apparel and accessory stores	\$79
48	Miscellaneous services	\$73
49	Apparel and other textile products Mfg.	\$60
50	Furniture and fixtures Mfg.	\$57
51	Stone, clay, and glass products Mfg.	\$55
52	Private households	\$53
53	Motion pictures	\$36
54	Instruments and related products Mfg.	\$34
55	Miscellaneous manufacturing industries	\$31
56	Primary metal industries Mfg.	\$29
57	Forestry	\$27
58	Motor vehicles and equipment Mfg.	\$20
59	Petroleum and coal products Mfg.	\$16
60	Museums, botanical, zoological gardens	\$7
61	Oil and gas extraction	\$1
62	Other Forestry, Fishing	\$0
63	Coal mining	\$0
64	Tobacco products Mfg.	\$0
65	Metal mining	\$0
66	Ordnance Mfg. 10/	\$0
67	Nonmetallic minerals, except fuels mining	\$0

US

Total Personal income	\$8,310,000
Earnings by Place of Work	\$6,083,302
Farm income 2/	\$49,956
Mining	\$51,593
Construction	\$363,000
Manufacturing	\$959,000
Transportation, Communicat'n and public utils	\$414,000
Wholesale trade	\$377,000
Finance, insurance, and real estate	\$574,000
Services	\$1,780,000
Government and government enterprises	\$945,000
Retail trade	\$529,000
Ag. services, forestry, fishing & other 9/	\$40,753
*Other Income	\$2,226,698

Earnings by Place of Work

1	Local Govt.	\$486,000
2	Business services	\$464,000
3	Health services	\$460,000
4	Finance	\$320,705
5	Engineering and management services 13/	\$243,000
6	Special trade contractors	\$237,000
7	Transportation	\$210,004
8	State Govt.	\$194,000
9	Federal, civilian Govt.	\$190,000
10	Insurance	\$139,295
11	Communications	\$130,000
12	Industrial machinery and equipment Mfg.	\$128,000
13	Eating and drinking places	\$123,000
14	Legal services	\$121,000
15	Real estate	\$114,000
16	Electronic and other electric equipment Mfg.	\$110,000
17	Chemicals and allied products Mfg.	\$93,668
18	Miscellaneous retail	\$93,092
19	Automotive dealers and service stations	\$88,483
20	General building contractors	\$84,168
21	Food stores	\$75,591
22	Military (Govt.)	\$75,017
23	Electric, gas, and sanitary Utilities	\$73,996
24	Printing and publishing (mfg)	\$73,075
25	Educational services	\$71,658
26	Fabricated metal products Mfg.	\$66,747
27	Motor vehicles and equipment Mfg.	\$66,673
28	Food and kindred products Mfg.	\$66,130
29	Social services 12/	\$60,708
30	Amusement and recreation services	\$60,087
31	Membership organizations	\$58,716
32	General merchandise stores	\$56,650
33	Instruments and related products Mfg.	\$53,716
34	Hotels and other lodging places	\$51,687
35	Auto repair, services, and parking	\$49,863
36	Personal services	\$49,501
37	Other transportation equipment Mfg.	\$49,173
38	Heavy construction contractors	\$42,292
39	Rubber and misc. plastics products Mfg.	\$39,540
40	Primary metal industries Mfg.	\$37,044
41	Home furniture and furnishings stores	\$36,619
42	Oil and gas extraction	\$36,344
43	Agricultural services	\$35,483
44	Paper and allied products Mfg.	\$33,247
45	Lumber and wood products Mfg.	\$31,207
46	Building materials and garden equipment	\$31,118
47	Motion pictures	\$27,378
48	Stone, clay, and glass products Mfg.	\$27,369
49	Apparel and accessory stores	\$24,572
50	Miscellaneous services	\$22,380
51	Furniture and fixtures Mfg.	\$19,499
52	Miscellaneous repair services	\$19,251
53	Textile mill products Mfg.	\$17,166
54	Apparel and other textile products Mfg.	\$17,071
55	Miscellaneous manufacturing industries	\$16,089
56	Private households	\$13,283
57	Petroleum and coal products Mfg.	\$9,234
58	Coal mining	\$6,749
59	Nonmetallic minerals, except fuels mining	\$6,279
60	Tobacco products Mfg.	\$2,773
61	Museums, botanical, zoological gardens	\$2,644
62	Leather and leather products Mfg.	\$2,279
63	Metal mining	\$2,221
64	Other Forestry, Fishing	\$2,180
65	Fishing	\$1,609
66	Forestry	\$1,481
67	Ordnance Mfg. 10/	\$0

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the total.

(N) Data not available for this year.

* Other Income includes Dividends/Interest/Rent, Transfer Payments, Personal Contributions for Social Insurance, and Adjustment for Residence.

Source: US Department of Commerce; Bureau of Economic Analysis (<http://www.bea.doc.gov>).

Maine's 50 Largest Private Employers as of June, 2003

RANK	EMPLOYER	DESCRIPTION	RANGE
1	HANNAFORD BROS CO	RETAIL TRADE	7601-7800
2	WAL MART PAYROLL DEPARTMENT	TRANSPORTATION & WAREHOUSING	6201-6400
3	BATH IRON WORKS CORP	MANUFACTURING	6201-6400
4	L L BEAN INC	TRANSPORTATION & WAREHOUSING	4501-4700
5	M B N A MARKETING SYSTEMS INC	FINANCE & INSURANCE	3401-3600
6	INSURANCE SERVICES FEDERAL CR UN	FINANCE & INSURANCE	3401-3600
7	SHAWS SUPERMARKETS INC	RETAIL TRADE	3401-3600
8	EASTERN MAINE MEDICAL CENTER	HEALTH CARE	2501-2700
9	BANKNORTH N A	FINANCE & INSURANCE	2301-2500
10	INTERNATIONAL PAPER CO	MANUFACTURING	2301-2500
11	MAINEGENERAL MEDICAL CTR AUGUSTA	HEALTH CARE	2301-2500
12	UTC SHARED BUSINESS SERVICE,	MANUFACTURING	1251-1450
13	HOME DEPOT USA INC	RETAIL TRADE	1251-1450
14	CENTRAL MAINE MEDICAL CENTER	HEALTH CARE	1251-1450
15	VERIZON NEW ENGLAND INC	INFORMATION	1251-1450
16	ANTHEM HEALTH SYSTEMS	FINANCE & INSURANCE	1251-1450
17	RITE AID OF MAINE INC	RETAIL TRADE	1251-1450
18	CIANBRO CORPORATION	CONSTRUCTION	1251-1450
19	CENTRAL MAINE POWER CO	CONSTRUCTION	1251-1450
20	JACKSON LABORATORY	PROF., SCIENTIFIC & TECHNICAL	1251-1450
21	S D WARREN	MANUFACTURING	1051-1250
22	MERCY HOSPITAL	HEALTH CARE	1051-1250
23	FAIRCHILD SEMICONDUCTOR CORP	MANUFACTURING	1051-1250
24	IRVING OIL CORPORATION	RETAIL TRADE	1051-1250
25	MEAD OXFORD CORP	MANUFACTURING	1051-1250
26	SWEETSER	HEALTH CARE	1051-1250
27	FRASER PAPERS INC	MANUFACTURING	851-1050
28	BOWDOIN COLLEGE	EDUCATIONAL SERVICES	851-1050
29	KINDRED NURSING CENTERS WEST LLC	HEALTH CARE	851-1050
30	ATTENDANT SERVICES INC	HEALTH CARE	851-1050
31	NEW BALANCE ATHLETIC SHOE INC	MANUFACTURING	851-1050
32	WEBBER HOSPITAL ASSOCIATION	HEALTH CARE	851-1050
33	BROWN CO, C N	RETAIL TRADE	851-1050
34	UNITED PARCEL SERVICE	TRANSPORTATION & WAREHOUSING	851-1050
35	DEAD RIVER COMPANY	TRANSPORTATION & WAREHOUSING	851-1050
36	GOODWILL INDUSTRIES OF NORTHERN N E	HEALTH CARE	851-1050
37	SEARS ROEBUCK AND CO.	TRANSPORTATION & WAREHOUSING	851-1050
38	INTERSTATE BRANDS CORP	MANUFACTURING	651-850
39	PENOBSCOT BAY MEDICAL CENTER	HEALTH CARE	651-850
40	MAINE BUSINESS SERVICES INC	ADMINISTRATIVE AND SUPPORT	651-850
41	BATES COLLEGE	EDUCATIONAL SERVICES	651-850
42	NORTH COUNTRY ASSOC INC	MANAGEMENT OF COMPANIES	651-850
43	SPURWINK SCHOOL, THE	EDUCATIONAL SERVICES	651-850
44	COMMUNITY HEALTH AND COUNS. SVC	HEALTH CARE	651-850
45	COLBY COLLEGE	EDUCATIONAL SERVICES	651-850
46	UNIVERSITY OF NEW ENGLAND	EDUCATIONAL SERVICES	651-850
47	ST MARY'S REGIONAL MEDICAL CTR	HEALTH CARE	651-850
48	BARBER FOODS	MANUFACTURING	651-850
49	YORK HOSPITAL	HEALTH CARE	651-850
50	BLETHEN MAINE NEWSPAPERS INC	INFORMATION	651-850