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Market Analysis

TOWN OF SKOWHEGAN, ME

APRIL 2021

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ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of $6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter @camoinassociate and on Facebook.

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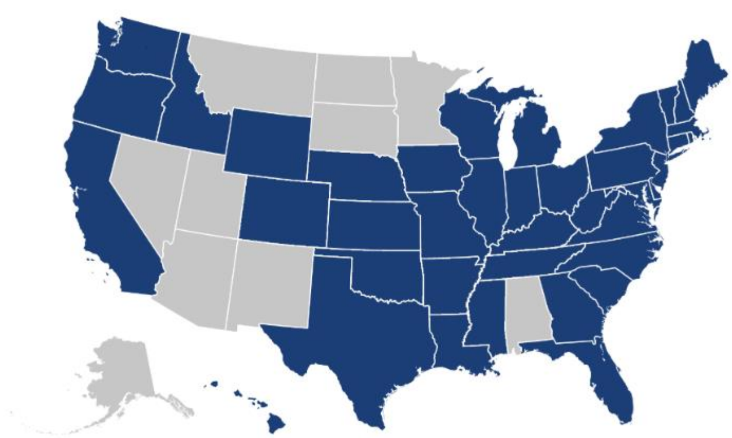

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EXECUTIVE SUMMARY

The 2016 Skowhegan Strategic Plan for Community Transformation includes the following goals:

- Capitalize on Skowhegan's unique location and natural resources.
- Leverage Skowhegan's existing businesses and strengths.
- Empower the community to think innovatively and creatively.
- Enhance economic vitality.
- Become a place where residents want to stay and that tourists want to visit.

Within this plan, two sectors are identified as having potential market opportunities for Skowhegan: food and beverage and recreation. The purpose of this industry market analysis is to provide Main Street Skowhegan and its partners with information about these sectors that can be used to create actionable strategies for entrepreneurship, downtown development, and business retention, expansion, and attraction.

While these sectors were evaluated independently, it is important to recognize that they are interdependent; the success of one is directly related to the success of the other.

FOOD & BEVERAGE MARKET SUMMARY

Skowhegan: 2020 Jobs: 812 | 2015-2020 Change in Jobs: 44 | % of All Jobs: 14%

Why it's important | The food and beverage sector is an important element of Skowhegan's economy. It is comprised of retail and service businesses as well as production and manufacturers that together represent over 800 jobs in Skowhegan (14% of total jobs).

What drives growth | Growth in the food and beverage sector is driven directly by consumer demand, which includes demand by residents and visitors. Consumers increasingly want local, high-quality products that are healthy and accessible. Consumer confidence and disposable income also drive this sector, especially for niche, specialty, environmentally conscious, socially conscious, and healthy products.

Opportunity for Skowhegan | Local businesses like Maine Grains are already tapping into these market trends (mainegrains.com). As existing businesses in Skowhegan continue to expand their customer base, and in turn increase the market demand for local high-quality products, new business opportunities will arise. The types of businesses with local and/or regional strengths and, therefore, that have the greatest potential for growth include:

- Breweries & Distilleries;
- Ice Cream and Frozen Desert / Frozen Food Manufacturers;
- Bread and Bakery Product Manufacturers; and
- Restaurant and Other Eating Places & Mobile Food.

MAINE GRAINS.

RECREATION MARKET SUMMARY

Skowhegan: 2020 Jobs: 253 | 2015-2020 Change in Jobs: -9 | % of All Jobs: 4.4%

Why it's important | The recreation sector in Skowhegan includes over 250 jobs representing 4.4% of total jobs. It is comprised of recreational activity and amusement businesses as well as retail and service businesses that sell recreational equipment and manufacturers that produce recreational products. In addition to providing assets and amenities that contribute to a high quality of life for residents, the recreation sector brings in outside spending. This visitor spending associated with Skowhegan's recreation industry has a multiplier of around 1.2, which means that if $100 is spent at a local recreation business, it leads to a total change of $120 in sales as that initial $100 circulates through Skowhegan's economy. *(This $120 includes the original $100.)*

What drives growth | Per capita disposable income, inbound trips by non-residents, and consumer confidence drive the recreation industry nationally. Regionally, the quality and quantity of recreational and tourism amenities (i.e. hotels, resorts, transportation, parks, entertainment, historic sites, etc.) drives industry performance.

Opportunity for Skowhegan | Within a large region rich with natural resources, Skowhegan is the prime location for entrepreneurs, residents, and small businesses to leverage regional economic activity within the recreation sector. This is thanks to its location on the Kennebec River and its role as a civic, service, and commerce center equipped with core infrastructure (i.e. active downtown, broadband, existing businesses, etc.). In addition, the municipality's proposed whitewater paddle and surf park, which will be located in the downtown river gorge, will drive opportunity in the recreation market. This makes Skowhegan well suited for accommodating growth in the recreation sector, specifically:

- Businesses that offer outdoor recreation activities (sightseeing, tour operators, RV parks and campgrounds, etc.);
- Sporting and recreational good retailers and wholesalers that offer products for outdoor activities; and
- Manufacturers of outdoor sporting and recreational goods (camping, kayaking, skiing, ATV, hiking, etc.).

STRATEGIES FOR LEVERAGING MARKET OPPORTUNITIES

- **Continue to build the opportunity sectors within Skowhegan.** For example, activate the downtown riverfront as an economic asset for recreation and related businesses, plus the amenities that serve them like food and entertainment.
- **Leverage Skowhegan business center that serves and supplies the regional outdoor recreation sector.** This includes continuing to grow support businesses in retail, service, and hospitality, as well as expand manufacturing and wholesaling related businesses that cater to the regional outdoor recreation sector.
- **Continue to shape Skowhegan's brand.** Skowhegan is a vibrant hub within a rural region with incredible natural resources, outstanding outdoor recreation opportunities, and an emerging food industry.

Skowhegan can leverage these market opportunities through the following tactics:

- Market through telling the unique stories of local food and outdoor recreation related industries from manufacturing to retail to service businesses, and tie these stories to Skowhegan as a place, especially downtown.
- Monitor consistently shifting consumer trends by engaging with businesses in these sectors. Report learnings of changing local and visitor preferences back to the business community.

- Continue connecting to and partnering with Maine-wide efforts including Maine Outdoor Brands, the Maine Department of Economic and Community Development, and other stakeholders critical to these industries.
- Actively target new small businesses and entrepreneurs within these sectors and work to support their efforts.
- Focus on expanding amenities for residents, employees, and visitors.

Because the market is thin, accomplishments will be incremental. Take advantage of one opportunity at a time. Success will require the community to make a sustained, long-term commitment to build brand around recreation.

FOOD & BEVERAGE MARKETS

- Beverage Production and Manufacturing
- General Food and Beverage Wholesale
- Crop and Animal Production, Processing, and Wholesale
- Prepared Food and Beverage
- Food Manufacturing
- Retail Food and Beverage

Market Trends and Factors to Leverage for Skowhegan

Trend towards high quality locally sourced products. → Leverage Maine's existing strong brand towards natural quality. → Focus on consumer demand for healthy, but also convenient and accessible food. → Stay focused on specially products and niches in the market.

RECREATION MARKETS

- Sporting and Recreation Good Production
- Retail Recreation
- Outdoor Recreation Activities
- Cultural Institutions and Amusement

Market Trends and Factors to Leverage for Skowhegan

Focus on outdoor intensive recreation that is unorganized (as opposed to organized sports). → Focus on small and niche markets. → Look for opportunities to combine goods and products with local experiences. → Look to attract cultural recreation opportunities to complement food and recreation offerings.

INTRODUCTION

In 2016, a town-wide strategic planning process led by Main Street Skowhegan identified food and beverage and recreation as the two most important industries for Skowhegan's future. In order to better understand potential opportunities for Skowhegan within these sectors, Main Street Skowhegan hired Camoin 310 to prepare this industry market analysis. The purpose of this analysis is to provide Main Street Skowhegan and its partners information about market trends within the food and beverage and recreation industries that can help strengthen Skowhegan's economic conditions.

To do this, we created industry market profiles for these most important industries. We examined economic activity by industry, as classified in the North American Industry Classification System (NAICS).[1] Additionally, we identified national industry trends to give further insight into regional industry considerations. We examined the following industry markets:

Food and Beverage Markets

- Beverage Production & Manufacturing
- General Food and Beverage Wholesale
- Crop and Animal Production, Processing, and Wholesale
- Prepared Food and Beverage
- Food Manufacturing
- Retail Food and Beverage

Recreation Markets

- Sporting and Recreation Good Production
- Retail Recreation
- Outdoor Recreation Activities
- Cultural Institutions & Amusement

The following industry market profiles present opportunities for business growth and development efforts in Skowhegan based on local, regional, and national industry trends.

It is important to note that the industry data utilized in this report includes 2020 projections that were made prior to the COVID-19 pandemic. The data analysis was conducted in the beginning of 2020 as the pandemic was beginning.

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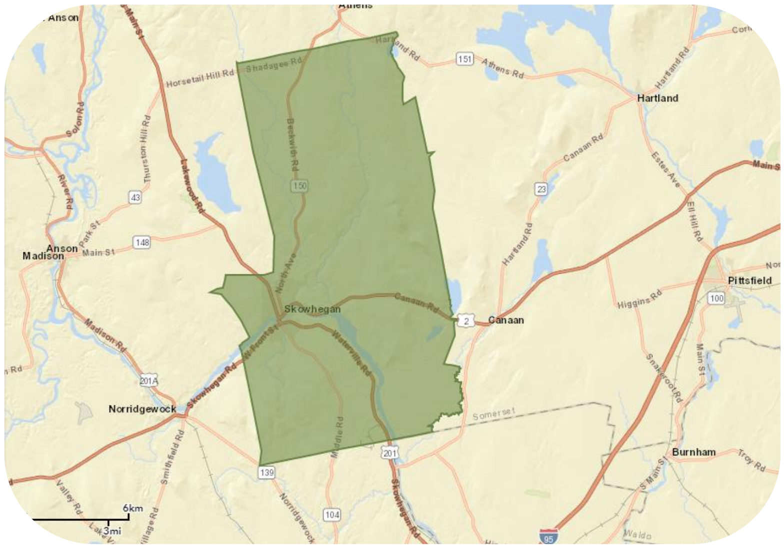
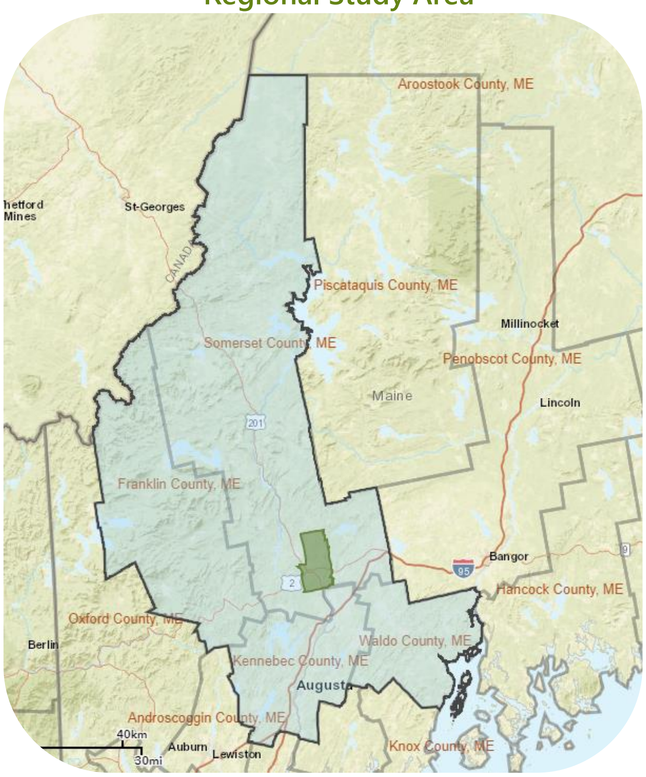
[1] Industry data was acquired from Emsi, which uses data compiled from several sources, including the US Census Bureau and the US Departments of Health and Labor. Using specialized proprietary processes and models, Emsi provides estimates on current statistics and predicts future trends.

STUDY AREAS

Skowhegan

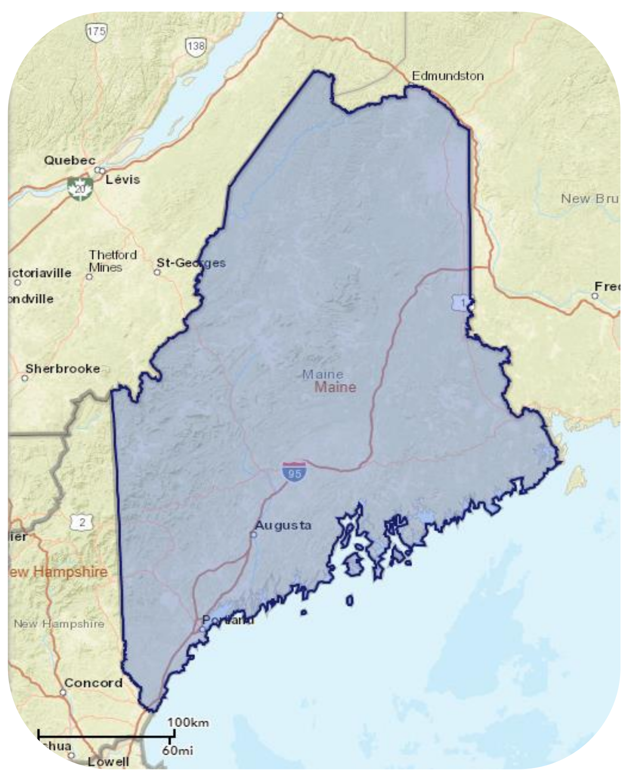


Regional Study Area



*Regional Study Area includes Franklin, Kennebec, Somerset, and Waldo Counties

Maine



FOOD AND BEVERAGE MARKET

BEVERAGE PRODUCTION AND MANUFACTURING

Beverage Production and Manufacturing contains industries involved in the direct sale or manufacturing of alcoholic and non-alcoholic beverages. Subindustries in this grouping include:

- Breweries (NAICS 31212)
- Wineries (NAICS 31213)
- Distilleries (NAICS 31214)
- Soft Drink Manufacturing (NAICS 31211)
- Coffee and Tea Manufacturing (NAICS 31192)

National Industry Trends

Revenues from 2015 to 2020 in the **Distilleries industry** were expected to grow by an annualized rate of 2.7% to $14.8 billion in 2020; while revenues in the **Breweries industry** were expected to decrease by an annualized rate of -2.7% to $29.8 billion in 2020. Revenue loss in the Breweries industry has been primarily driven by losses to major beer producers who have been facing broader competition from craft brewers in recent years. Revenue gains in the Distilleries industry have been primarily due to premiumization, the trend in which consumers trade up to higher-quality, higher-priced spirits. Changing consumer preferences favoring craft breweries and distilleries have driven industry growth. Overall, consumer preferences have shifted toward breweries with a range of beer styles, quality ingredients, and a high degree of expertise. Similarly, consumers prefer craft and artisanal spirits. Most new artisanal distilleries are focused on whiskey production, though a significant number also produce craft vodkas.

Demand for the Distilleries industry and Breweries industry is determined by several variables, including per capita disposable income[2], evolving consumer preferences, demographic changes, the price of spirits and beer relative to alternative alcoholic beverages, and the level of competition from imported spirits and beers. Key external drivers of demand in both the Breweries industry and Distilleries industry include consumer spending and excise taxes on alcohol. Total advertising expenditures, promotional materials, and the introduction of new products can greatly improve demand for beer and spirits. In addition, government intervention can influence demand through increasing regulations, which include limits on hours of sale, excise taxes on alcohol purchases, and restrictions on private off-premises sales of alcohol. Because per capita consumption of alcohol is higher among individuals aged 21 to 35 years old compared with those of older age groups, regional demographics can also provide insight into alcohol consumption trends.

Unlike beer, which has a limited export market due to competition from international producers, whiskeys—specifically bourbon—dominate US exports. This is because to be labeled accordingly, bourbon must be produced in the United States. Bourbons make up more than half of all whiskey by volume the United States exports each year.

Revenues from 2015 to 2020 in the **Soft Drink Manufacturing industry** were expected to decrease by an annualized rate of -3.6% to $40.1 billion in 2020. While revenue losses in the Soft Drink Manufacturing industry have been driven primarily by changing consumer preferences for healthy drink options, demand for Soft Drink

[2] Per capita disposable income is the amount of discretionary income an individual has to purchase goods and services. Higher disposable income generally means a higher amount of consumer spending.

Manufacturing industry products depend on several factors including price levels, consumers' health concerns, and product innovation. Key external drivers of the soft drink manufacturing industry include disposable income, consumer preferences between sodas and other healthier options, and government-imposed bans and taxes on sugary drinks. Carbonated soft drink and energy drink producers engage in a limited amount of international trade because the value of packaged beverages is low when compared with the cost of transporting and distributing industry goods.

Local and Regional Industry Trends

Employment in the **Breweries industry** has grown by 157% or 44 jobs in the Regional Study Area, and by 141% or 491 jobs in Maine from 2015 to 2020. The industry has also seen substantial job growth in the US, growing by 87% or approximately 43,000 jobs since 2015. In Skowhegan, there are 24 jobs in the Breweries industry, and the industry has a location quotient (LQ)[3] of 7.2.

The **Distilleries industry** grew by 111% or 123 jobs in Maine, and by 66% or approximately 7,500 jobs in the US from 2015 to 2020. The industry currently has no job presence in Skowhegan, and only a limited presence (<10 jobs) in the Regional Study Area.

The **Soft Drink and Manufacturing** industry grew by 42% or 27 jobs in the Regional Study Area, and by 21% or 176 jobs in Maine from 2015 to 2020. The industry currently has no job presence in Skowhegan.

CROP AND ANIMAL PRODUCTION, PROCESSING, AND WHOLESALE

Crop and Animal Production, Processing, and Wholesale contains subindustries involved in the production, packaging, storage, and/or wholesale of raw food and plant materials. Industries in this grouping include:

- Crop Production (NAICS 11100)[4]
- Animal Production (NAICS 11200)
- Animal Slaughtering and Processing (NAICS 31161)
- Seafood Product Preparation and Packaging (NAICS 31171)
- Other Farm Product Raw Material Merchant Wholesalers (NAICS 42459)
- Fish and Seafood Merchant Wholesalers (NAICS 42446)
- Meat and Meat Product Merchant Wholesalers (NAICS 42447)
- Poultry and Poultry Product Merchant Wholesalers (NAICS 42444)
- Fresh Fruit and Vegetable Merchant Wholesalers (NAICS 42448)
- Farm Product Warehousing and Storage (NAICS 49313)
- Livestock Merchant Wholesalers (NAICS 42452)
- Grain and Field Bean Merchant Wholesalers (NAICS 42451)
- Fruit and Vegetable Canning, Pickling, and Drying (NAICS 31142)

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[3] Location quotient (LQ) is a way of quantifying how concentrated a particular industry is in a region compared to broader national trends. It can reveal what makes a particular region "unique" in comparison to the national average, and generally an LQ of greater than 1.0 indicates an area of significant industry concentration.

[4] Note that the local business Maine Grains is technically classified within Crop Production as 'Postharvest Crop Activities' (see sidebar on page 11).

National Industry Trends

Revenues from 2015 to 2020 in the **Crop Production industry** were expected to decrease by an annualized rate of -0.1% to $20.4 billion in 2020. A push toward healthy eating has increased the market for fresh vegetables, despite slightly weaker per capita consumption, as opposed to processed vegetables. This has benefited the industry, as fresh vegetables generally sell for more than double the price of processed vegetables and yield higher profit margins for farmers. However, rising domestic per capita availability has prevented stronger increases in domestic prices, limiting revenue and profit gains for industry operators during the period.

Key external drivers of demand in the Crop Production industry include demand for fruit-and-vegetable wholesaling, fruit and vegetable consumption, the price of vegetables, and average annual precipitation. Exchange rate movements directly affect demand for US vegetables in foreign markets. Like domestic manufacturers, overseas customers are sensitive to price increases. Any appreciation in the value of the US dollar will erode the price competitiveness of US-grown vegetables abroad. This, combined with increased production overseas (particularly in China) and the removal of trade barriers in some parts of the world, has served to increase global competition and reduce demand overseas for US-grown vegetables.

Revenues from 2015 to 2020 in the **Grain and Field Bean Merchant Wholesalers industry** were expected to decrease by an annualized rate of -4.0% to approximately $200 billion in 2020. Decreases in revenues have been driven primarily by decreases in demand in several downstream markets over the last five years, with the domestic use of corn and soybeans in biofuel production having the greatest influence on industry performance. It is important to note that this industry's poor performance has primarily been a result of a comedown off of historic highs in the prices of corn, wheat, and soybeans earlier in the decade. Due to the extreme oversupply and weak supply utilization in the United States, end stocks of industry products have increased, which has also negated the opportunity for greater price appreciation and increases in industry revenues.

Revenues from 2015 to 2020 in the **Animal Production industry** were expected to decrease by an annualized rate of -5.2% to $65.5 billion in 2020. Fluctuating feed prices have caused extreme volatility in the price of red meat, with prices declining by -4.8% from 2015 to 2020 causing a decrease in industry revenue. A collapse in red meat prices in 2015 and 2016 greatly diminished returns, resulting in lower profitability despite a concurrently falling price of animal feed.

Revenues from 2015 to 2020 in the **Animal Slaughtering and Processing industry** were expected to decrease by an annualized rate of -0.3% to $232.1 billion in 2020. The industry has contended with volatile meat prices resulting from drought, disease, and volatile feed prices. Difficult agricultural conditions have caused an imbalance of livestock supply, ultimately resulting in a boom-and-bust cycle in which supply has reached levels far above and far below demand within just five years. Such volatility has hindered the industry as the fluctuating price received for products has made production output difficult to anticipate. Conversely, consumer demand has exhibited strong growth during the current period, as per capita disposable income has increased in line with the economy. Nevertheless, market conditions over the past five years have been difficult for industry operators, ultimately offsetting growth factors.

Key external drivers of demand in the Animal Production, Slaughtering, and Processing industries include consumer demand, the price of feed and meat, and the trade weighted-index[5]. Many factors help determine the average US

[5] The trade-weighted index (TWI) represents the value of the US dollar relative to the currencies of its major trading partners. When the TWI is low, US-produced meats become more affordable to foreign buyers because the US dollar has a relatively lower value against foreign currencies.

consumer's consumption of meat products. These factors include price, income, nutrition and health concerns, environmental factors, and seasonality. The most important factor, however, is price. As the price of certain meats increases, consumers will likely purchase less of that meat and look to substitute with other sources of protein.

Animal product exports are expected to increase in the coming years as rising affluence in newly industrialized countries has increased demand for meat products. At the same time, the strong US dollar has made US-produced foods less affordable internationally, hindering exports' share of the industry. Although demand for the Meat, Beef, and Poultry Processing industry is generally positively related to increases in disposable income, the case of red meat is an exception because of changing consumer diets and lifestyles.

Local and Regional Industry Trends

A majority of industries in this market are small or non-existent in Skowhegan. Only the **Crop Production** and **Animal Production industries** had a job presence in Skowhegan in 2020, and both industries saw job losses of 15% and 20%, respectively from 2015 to 2020. Industries in this grouping also have a limited presence in the Regional Study Area. However, a notable business that technically falls within this group is Maine Grains. Maine Grains is technically classified within Postharvest Crop Activities. It is highlighted below under Food Manufacturing because it exemplifies the opportunities for Skowhegan in that sector.

The **Animal Slaughtering and Processing industry** grew by 71% or 24 jobs in the Regional Study Area, and by 22% or 97 jobs in Maine from 2015 to 2020. The industry currently has no job presence in Skowhegan.

FOOD MANUFACTURING

Food Manufacturing contains industries involved in the manufacturing of various foods and other goods. Industries in this grouping include:

- Flour Milling and Malt Manufacturing (NAICS 31121)
- Starch and Vegetable Fats and Oils Manufacturing (NAICS 31122)
- Breakfast Cereal Manufacturing (NAICS 31123)
- Sugar Manufacturing (NAICS 31131)
- Nonchocolate Confectionery Manufacturing (NAICS 31134)
- Chocolate and Confectionery Manufacturing (NAICS 31135)
- Frozen Food Manufacturing (NAICS 31141)
- Dairy Product (except Frozen) Manufacturing (NAICS 31151)
- Ice Cream and Frozen Dessert Manufacturing (NAICS 31152)
- Bread and Bakery Product Manufacturing (NAICS 31181)
- Cookie, Cracker, and Pasta Manufacturing (NAICS 31182)
- Tortilla Manufacturing (NAICS 31183)
- Snack Food Manufacturing (NAICS 31191)
- Flavoring Syrup and Concentrate Manufacturing (NAICS 31193)
- Seasoning and Dressing Manufacturing (NAICS 31194)
- All Other Food Manufacturing (NAICS 31199)

National Industry Trends

The majority of industries within the Food Manufacturing grouping have remained steady or have declined from 2015 to 2020. Growth in these industries is primarily driven by consumer preference and taste, customer loyalty, disposable income, and the cost of raw goods used to produce processed food products (i.e. sugar, milk, flour, wheat, etc.). In many of the industries, increasing customer demand for healthier and more nutritious products has and will continue to drive production trends.

Imports of goods produced by a majority of industries within the Food Manufacturing industry grouping generally remain low as many consumers prefer domestically manufactured foods that are in line with their tastes, and as domestic producers can meet a majority of domestic demand in the United States. Exports are generally limited and have seen little growth due to high transportation costs particularly in the case of frozen goods, and the growing strength of the US dollar, which make products more expensive for consumers in international markets.

Local and Regional Industry Trends

The **Ice Cream and Frozen Dessert Manufacturing industry** has an LQ of 3.5 in the Regional Study Area and grew by 47% or 18 jobs from 2015 to 2020. In Maine, the industry has grown by 13% or 10 jobs since 2015. There are 35 jobs in the industry in Skowhegan in 2020, and the industry has an LQ of 45.1.

The **Frozen Food Manufacturing industry** grew by 12% or 17 jobs in the Regional Study Area and has an LQ of 2.6. Frozen Food Manufacturing jobs have decreased by 18% or 176 jobs in Maine since 2015. In Skowhegan, the Frozen Food Manufacturing industry added 23 jobs since 2015 (there was previously no job presence in the industry in Skowhegan in 2015), and the industry has an LQ of 6.0.

The **Bread and Bakery Product Manufacturing industry** grew by 38% or 51 jobs in the Regional Study Area, and by 12% or 179 jobs in Maine from 2015 to 2020. The industry saw 0% job growth from 2015 to 2020 in Skowhegan, and there were 43 jobs in 2020. The industry has a LQ of 4.6 in Skowhegan.

TRENDS IN LOCAL SPECIALTY FOOD PRODUCTION

Trends favoring localized, quality, and small-batch production have helped small- to medium-sized businesses grow and thrive in communities even without the presence of major industry players. For example, in Skowhegan, businesses like Maine Grains have contributed to what some consider an agricultural renaissance in the region (though technically classified within Crop Production – Postharvest Crop Activities). Maine Grains serves bakers, brewers, chefs, and families freshly milled, organic, and heritage grains sourced from the Northeast. The company's website indicates that in addition to providing fresh, local grains, "Maine Grains focuses on creating jobs, improving land use, and serving as a successful model for thriving local economies."

Businesses like Maine Grains provide examples of expanding opportunities for producers that focus on local, quality, and specialty foods. These businesses are not only key contributors to local and regional economies, but also have provided resiliency during the Covid-19 pandemic at a time when demand for local goods has increased due to rising food prices at the national level and the need for more localized food production supply chain partners. Furthermore, these agrarian-based businesses are supported throughout the state of Maine by various public, private, and nonprofit organizations such as the Maine Department of Agriculture, Conservation, and Forestry; The Maine Food Strategy; CEI Maine; and the Maine Center for Entrepreneurs.

Source: US Department of Commerce

**For more detailed tables and data see Appendix #2*

GENERAL FOOD AND BEVERAGE WHOLESALE

General Food and Beverage Wholesale includes industries involved in wholesale distribution activities of various food and beverage products. Industries in this grouping include:

- General Line Grocery Merchant Wholesalers (NAICS 42441)
- Packaged Frozen Food Merchant Wholesalers (NAICS 42442)
- Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 42443)
- Confectionery Merchant Wholesalers (NAICS 42445)
- Other Grocery and Related Products Merchant Wholesalers (NAICS 42449)
- Beer and Ale Merchant Wholesalers (NAICS 42481)
- Wine and Distilled Alcoholic Beverage Merchant Wholesalers (NAICS 42482)

National Industry Trends

Revenues from 2015 to 2020 in the **Beer and Ale Merchant industry** were expected to increase by an annualized rate of 1.0% to $74.4 billion in 2020. US beer production has traditionally been highly concentrated, with the majority controlled by two companies (Anheuser-Busch InBev and MillerCoors); however, small-scale craft breweries have become increasingly popular among consumers and spending on high-quality alcohol has steadily increased. Consumers are now showing more interest in higher-margin beer products such as high-quality craft beers. Most wholesalers only service the domestic market; however, some larger international distributors do exist.

Revenues from 2015 to 2020 in the **Wine and Distilled Alcoholic Beverage Merchant Wholesaler industry** were expected to increase by 2.6% to $110.3 billion in 2020. Industry growth has partly been the result of US state alcohol distribution laws. Under the three-tier distribution system adopted by most states, industry wholesalers are required to act as an intermediary between producers and retailers. Only licensed retailers may sell directly to consumers, and retail establishments are required to purchase from licensed wholesalers. This structure has prevented most downstream consumers from purchasing directly from manufacturers. Wine producers were recently granted the ability to sell limited quantities directly to consumers, including in Maine. This has created small losses for wholesalers, but this does not currently represent a major threat to industry operators. Wholesalers serve the domestic market, and many wholesalers distribute to specific states and regions of the United States.

Key external drivers of demand in both the Beer and Ale Merchant, and Wine and Distilled Alcoholic Beverage Merchant Wholesaler industries include per capita expenditures on alcohol, disposable incomes, and excise taxes on beer, wine, and/or spirits.

Revenues from 2015 to 2020 in the **Packaged Frozen Food Merchant Wholesalers industry** were expected to decrease by an annualized rate of -0.1% to $145.6 billion in 2020. Revenue declines can largely be attributed to consumers remaining skeptical of the nutritional content of frozen foods, and consumers gravitating toward fresh foods. Additional external drivers of industry demand include consumer preferences, the agricultural price index[6] and disposable consumer incomes. The Packaged Frozen Foods Merchant Wholesalers industry does not directly

[6] The agricultural price index measures prices received by farmers in the United States for agricultural products. Agricultural products are also inputs to this industry, so an increase in prices will raise total industry revenue, but also put pressure on industry margins.

participate in international trade. Instead, the value of imports and exports exchanged in this industry is accounted for at the manufacturing level.

Local and Regional Industry Trends

The industries within the General Food and Beverage Wholesale grouping currently have no job presence in Skowhegan.

The **General Line Grocery Merchant Wholesalers industry** grew by 21% or 38 jobs in the Regional Study Area, and by 8% or 47 jobs in Maine from 2015 to 2020.

The **Packaged Frozen Food Merchant Wholesalers industry** grew by 53% or 23 jobs in Maine, and by 13% or approximately 3,900 jobs in the US from 2015 to 2020. The industry currently does not have a job presence in the Regional Study Area or Skowhegan.

RETAIL FOOD AND BEVERAGE

Retail Food and Beverage includes industries that participate in the direct sale of various foods and beverages to consumers. Industries in this grouping include:

- Supermarkets and Other Grocery (except Convenience) Stores (NAICS 44511)
- Convenience Stores (NAICS 44512)
- Meat Markets (NAICS 44521)
- Fish and Seafood Markets (NAICS 44522)
- Fruit and Vegetable Markets (NAICS 44523)
- Other Specialty Food Stores (NAICS 44529)
- Beer, Wine, and Liquor Stores (NAICS 44531)

National Industry Trends

Revenues from 2015 to 2020 in the **Supermarkets and Other Grocery (except Convenience) Store industry** were expected to grow by an annualized rate of 1.2% to $682.0 billion in 2020. Despite projected revenue growth, industry operators have experienced intensifying competition from alternative retailers as consumers, in some cases, have turned toward warehouse clubs and supercenters due to cost savings and convenience. These mass merchandisers are able to offer lower prices due to their scale of operations. Consumers have also shifted toward limited assortment and fresh format stores that provide a simpler layout and primarily sell less costly store-brand products. Due to increased competition from a variety of retailers, many large national grocery chains have offered big discounts and promotions to drive foot traffic to their stores and strengthen consumer loyalty. Key external drivers of demand include disposable incomes, consumer price sensitivity, and location/convenience.

Revenues from 2015 to 2020 in the **Other Specialty Food Stores industry** were expected to decrease by an annualized rate of -1.4% to 10.1 billion in 2020. Losses can primarily be attributed to rising competition from other industry operators that have focused on supplying traditional supermarkets and grocery stores with specialty food products. However, these losses have been partially offset by rising health awareness and shifting consumer preferences toward premium, all-natural foods. Purchases of products sold by operators in specialty food stores are driven primarily by household disposable income and consumer confidence. Key external drivers of demand include disposable incomes, the price of industry products relative to other retail stores, and consumer preferences focused on health awareness and nutrition.

Local and Regional Industry Trends

Supermarkets and Other Grocery (except Convenience) Stores have a large job presence in Skowhegan (168 jobs), the Regional Study Area (2,581 jobs), and Maine (16,199) in 2020. Industry jobs increased by 0% in Skowhegan, by 5% or 129 jobs in the Regional Study Area, and by 6% or 879 jobs in Maine from 2015 to 2020.

Beer, Wine, and Liquor Stores grew by 32% or 21 jobs in the Regional Study Area, and by 17% or 60 jobs in Maine from 2015 to 2020. There are approximately 20 jobs in the industry in Skowhegan in 2020, and the industry has an LQ of 2.7.

The region has few jobs within the **Other Specialty Food Stores industry**. Because of the market, specialty foods are sold within, or as part of, other stores (i.e. supermarkets or other stores).

PREPARED FOOD AND BEVERAGE

Prepared Food and Beverage contains industries involved in the direct sale of various prepared foods and beverages to consumers. Industries in this grouping include:

- Food Service Contractors (NAICS 72231)
- Caterers (NAICS 72232)
- Mobile Food Services (NAICS 72233)
- Drinking Places (Alcoholic Beverages) (NAICS 72241)
- Restaurants and Other Eating Places (NAICS 72251)

National Industry Trends

All industries in the Prepared Food and Beverage grouping realized positive revenue growth from 2015 to 2020 driven by increasing disposable incomes and consumer spending. The **Restaurant and Other Eating Places industry** was expected to have the highest revenues of all industries in the grouping at $170.5 billion in 2020, and the **Mobile Food Services industry** was expected to experience the largest percent revenue growth (even with the impacts from the Covid-19 pandemic) at an annualized rate 6.5% from 2015 to 2020. Growth in the Mobile Food Services Industry has primarily been driven by increased consumer spending, increasing urban populations, vendors' agility, and ability to change products for sale to consumers, and consumer preference for easy, inexpensive, and accessible healthy gourmet options.

Key external drivers in the Prepared Food and Beverage industry grouping generally include consumer spending and confidence, disposable incomes, ease of access and relative location of industry establishments (convenience), consumer preferences and healthy eating habits, and the occurrence and popularity of large events and gatherings (i.e. sporting events, weddings, etc.).

Local and Regional Industry Trends

The **Restaurant and Other Eating Places industry** has a large job presence in Skowhegan (404 jobs), the Regional Study Area (6,252 jobs), and Maine (44,182 jobs) in 2020. Industry growth ranged from 6% or 24 jobs in

Skowhegan, to 9% or 499 jobs in the Regional Study Area, and 8% or approximately 3,300 jobs in Maine from 2015 to 2020.

The **Drinking Places (Alcoholic Beverages) industry** grew by 23% or 220 jobs in Maine from 2015 to 2020. The industry decreased by -26% or -28 jobs in the Regional Study Area from 2015 to 2020. The industry has a minimal job presence in Skowhegan in 2020 (<10 jobs).

Mobile Food industry jobs have increased by 38% or 8 jobs in the Regional Study Area, and by 57% or 100 jobs in Maine from 2015 to 2020. The industry has also seen substantial job growth (39% or 16,180 jobs) in the US since 2015. The industry currently has no job presence in Skowhegan.

RECREATION MARKET

SPORTING AND RECREATIONAL GOOD PRODUCTION

Sporting and Recreational Good Production contains industries participating in sporting, recreation, and athletic goods manufacturing and wholesale. Industries in this grouping include:

- Sporting and Athletic Goods Manufacturing (NAICS 33992)
- Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 42391)

National Industry Trends

Revenues from 2015 to 2020 in the **Sporting and Athletic Goods Manufacturing industry** were expected to decrease by an annualized rate of -0.7% to $9.0 billion in 2020. Industry growth has been hampered by decreasing international demand for products as domestically produced goods became comparatively more expensive in foreign markets, decreasing export sales volumes.

Revenues from 2015 to 2020 in the **Sporting and Recreational Goods and Supplies Merchant Wholesalers industry** were expected to increase by an annualized rate of 1.5% to $48.5 billion in 2020. Industry growth has remained modest over the past five years due to manufactures having built out vast e-commerce channels, bypassing wholesalers in recent years. However, wholesalers' strong relationships with small, specialty retailers have enabled them to partially mitigate revenue declines.

Key external drivers in demand in the Sporting and Athletic Goods Manufacturing and Sporting and Recreational Goods and Supplies Merchant Wholesaler industries include participation in sports and demand from sporting goods and department stores. Wholesale demand for sporting and recreational equipment is largely driven by trends at the retail level. Consumers' discretionary income determines the quality, quantity, and frequency of sporting goods purchased. The sports participation rate, which measures the percentage of people who participate in sports or recreational exercise daily, and the growth and age of the population, impact demand for sporting goods. Population demographics also influence the type of sporting activity undertaken by consumers and the type of equipment they require.

International trade in sporting goods products has been subject to increasing levels of competition from products manufactured in Asia, particularly in China and Taiwan. Typically, foreign manufacturers are able to produce similar products at comparatively lower operating costs. The influx of imported goods into the domestic market has created an intensely competitive environment for wholesalers.

Sporting good and other outdoor recreation equipment has seen a resurgence and has been highly sought after by consumers during the Covid-19 pandemic. Equipment such as bicycles (which are projected by some to experience shortages well into 2021), kayaks, camping gear such as tents and sleeping bags, camping furniture, and freeze-dried foods have been in short supply. This is because consumers have raced to purchase these items as more and more individuals pivot to staycation and other outdoor vacation and recreational activities. For much of the outdoor recreation industry, this is generally good news as consumers are finding new hobbies and forming habits, driving further participation in the outdoor recreation industry.[7]

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[7] https://www.nytimes.com/2020/08/04/style/outdoor-camping-gear-pools-backordered.html

Local and Regional Industry Trends

This industry grouping currently does not have any presence in Skowhegan and has a limited presence in the Regional Study Area and State of Maine.

RETAIL RECREATION

Retail Recreation contains industries that participate in the direct sale of recreational equipment and other goods to consumers. This grouping includes:

- Recreational Vehicle Dealers (NAICS 44121)
- Sporting Goods Stores (NAICS45111)
- General Merchandise Stores, including Warehouse Clubs and Supercenters (NAICS 45231)

National Industry Trends

Revenues from 2015 to 2020 in the **Recreational Vehicle Dealer industry** were expected to grow by an annualized rate of 4.5% to approximately $30 billion in 2020 (this sector includes ATVs, snowmobiles, and other outdoor recreational vehicles). The industry has seen growth in recent years primarily due to increasing disposable incomes, lower interest rates and availability of credit, and RV purchases by retiring Baby boomers. Key demand determinants include competition with other vacation and leisure industries and seasonal fluctuations. RVs are particularly popular among retired people, both as an activity and as an alternative to traditional housing. Demographic trends can thus be a driving force for this industry. The mass retirement of the baby-boomer generation, born between 1946 and 1964, is expected to boost demand for industry products in the future. Key external drivers of demand in the Recreational Vehicle Dealer industry include disposable income and consumer preferences for leisure and sports, the worldwide price of oil, and consumer access to credit.

Revenues from 2015 to 2020 in the **Sporting Goods Stores industry** were expected to decrease by an annualized rate of -2.5% to $44.5 billion in 2020. This trend has primarily been due to increased international competition and a declining number of new operators entering the industry in recent years. Key external drivers of demand in the Sporting Goods Stores industry include disposable income, consumer

MAINE'S OUTDOOR RECREATION INDUSTRY

The US Department of Commerce Bureau of Economic Analysis' latest report on the US outdoor recreation industry indicates several key findings surrounding Maine's outdoor recreation industry:

- Outdoor recreation makes up a larger percentage of the state's total employment (6.4%) than almost any other state (ranked third behind Hawaii and Montana).
- Outdoor recreation supports more than 40,000 jobs in Maine, accounting for 6.4% of employment.
- The private industry generates $2.8 billion of outdoor industry dollars in Maine.
- Outdoor recreation makes up 4.8% of Maine's economy, more than double the national average.
- Boating and fishing are the state's largest conventional outdoor contributors to the economy, at $248 million, mirroring the national economy where they are also the biggest contributors.
- The biggest industry contributor is accommodation and food, generating $986 million; followed by retail at $620 million.

Source: US Department of Commerce

**For more detailed tables and data see Appendix #2* preferences for leisure and sports, general participation in sports, and population demographics, as younger generations are more likely to participate in sporting activities.

Local and Regional Industry Trends

The **Recreation Vehicle Dealer industry** grew by approximately 60% or 30 jobs in the Regional Study Area, and by 35% or 63 jobs in Maine from 2015 to 2020. The industry currently has no job presence in Skowhegan.

The **General Merchandise Stores, including Warehouse Clubs and Supercenters** made up a significant number of jobs in Skowhegan in 2020 at 188, and the industry has an LQ of 2.7. The industry also has a significant number of total jobs in the Regional Study Area (2,253 jobs) and State of Maine (8,894 jobs), and total jobs grew by 10% in both geographies from 2015 to 2020.

The **Sporting Goods Stores industry** in Skowhegan decreased from 22 jobs in 2015 to 16 jobs in 2020 (27% decline). Despite the recent decline, this sector has an LQ of 1.7. Local trends contradicted growth in the Regional Study Area, where the industry grew by 11% or 20 jobs, but were in line with statewide trends, where the sector declined by 9% (28,035 jobs).

OUTDOOR RECREATION ACTIVITIES

Outdoor Recreation Activity contains a variety of industries related to outdoor recreation activities and sightseeing. This grouping includes:

- Scenic and Sightseeing Transportation, Land (NAICS 48711)
- Scenic and Sightseeing Transportation, Water (NAICS 48721)
- Scenic and Sightseeing Transportation, Other (NAICS 48799)
- Tour Operators (NAICS 56152)
- Golf Courses and Country Clubs (NAICS 71391)
- Skiing Facilities (NAICS 71392)
- Marinas (NAICS 71393)
- Fitness and Recreational Sports Centers (NAICS 71394)
- RV (Recreational Vehicle) Parks and Recreational Camps (NAICS 72121)

National Industry Trends

Revenues from 2015 to 2020 in the **Scenic Sightseeing Transportation industry** were expected to decrease by 4.0% to $3.5 billion in 2020. Though the industry has benefited from improving economic conditions, including rising levels of per capita disposable income and increased consumer spending, the ongoing Covid-19 pandemic has completely disrupted travel, and severely impacted industry revenues. Industry operators have also experienced intensifying competition from mobile apps and websites that help consumers plan their own vacation, which have contributed to revenue losses.

Revenues from 2015 to 2020 in the **Tour Operators industry** were expected to grow by 0.4% to $7.1 billion in 2020 prior to the Covid-19 pandemic, due to rising disposable income levels and a strengthening global economy.

Demand for services offered by both the Sightseeing Transportation and Tour Operators industries is largely influenced by consumer spending, global travel patterns, and disposable incomes. When consumers have limited disposable income, they generally curb their spending and are less likely to travel long distances or spend on discretionary purchases, such as sightseeing tours. International travelers are also a large source of revenue for industry operators, so geopolitical events that influence international travel may also negatively affect industry performance. A company's reputation can also play a crucial role in determining demand for its services. With the prevalence of the internet, tourists can easily read or leave reviews about companies that can influence their purchasing decisions. As a result, operators with a reputation for providing knowledgeable tours and good customer service can more easily attract customers.

Revenues from 2015 to 2020 in the **RV (Recreational Vehicle) Parks and Recreational Camps industry** were expected to grow by an annualized rate of 3.2% to $7.5 billion in 2020. An increasing amount of time spent on leisure and travel by the baby boomer generation (ages 50 and older) via RV's has contributed to steady growth for industry operators, in addition to increased RV sales overall. Demand for the RV (Recreational Vehicle) Parks and Recreational Camps industry derives primarily from domestic travelers and, to a lesser extent, international travelers visiting the United States. Travel trends are affected by economic conditions, including per capita disposable income levels and consumer spending patterns, as higher employment and income levels generally coincide with higher rates of travel. Demand for this industry's services also correlates with the popularity of camping and the use of RVs as a form of travel, which has increased during the Covid-19 pandemic. Adults aged 50 and older are the major demographic segment for campgrounds and RV parks. The progressive aging of the US population has increased RV park and campground demand as more Americans have neared or entered the age of retirement over the past five years.

Local and Regional Industry Trends

In the Regional Study Area, the **RV Park and Recreational Camp industry** has an LQ of 8.5 and has grown by 4% or 16 jobs since 2015. In Maine, the industry has an LQ of 6.6 and has grown by 5% or 94 jobs since 2015. While the industry currently has no job presence directly in Skowhegan, there are several RV sellers and camps immediately adjacent to the town in Madison, ME.

The **Skiing Facility industry** has the highest LQ of any of the target recreation industries in Skowhegan (5.1LQ), the Regional Study Area (17.9LQ), and Maine (6.9LQ). The industry currently has a large presence in the Regional Study Area at 521 jobs, but jobs decreased by -7% or -38 jobs from 2015 to 2020. There are currently fewer than 10 jobs in the industry in Skowhegan. Recent renewed interest and investment in Eaton Mountain Ski Area, a small alpine hill on the outskirts of town, paired with two groomed cross-country ski and fat bike trail networks, and the town's location as the gateway to Maine's 4,000 miles of snowmobile trails, all reinforce Skowhegan's position as a year-round recreation hub and further strengthen the outdoor recreation brand.

CULTURAL INSTITUTIONS AND AMUSEMENT

Cultural Institutions and Amusement contains a variety of industries related to recreation activities at cultural institutions, outdoor areas/parks, and amusement facilities. This grouping includes:

- Museums (NAICS 71211)
- Historical Sites (NAICS 71212)
- Zoos and Botanical Gardens (NAICS 71213)
- Nature Parks and Other Similar Institutions (NAICS 71219)
- Amusement and Theme Parks (NAICS 71311)

- Amusement Arcades (NAICS 71311)
- Casinos (except Casino Hotels) (NAICS 71321)
- Other Gambling Industries (NAICS 71329)
- Bowling Centers (NAICS 71395)
- All Other Amusement and Recreation Industries (NAICS 71399)

National Industry Trends

Revenues from 2015 to 2020 in the **Nature Parks and Other Similar Institutions industry** were expected to decrease by an annualized rate of -1.8% to 13.2 billion in 2020. Most industry operators are nonprofit entities that rely on government funding. From 2015 to 2020, tight budgets have forced some operators to close entirely, while others have reduced their operating hours or services to make up for decreased or inadequate funding. Others have increased or introduced admission fees or bolstered their on-site product and service offerings. However, marginal increases in leisure time, rising competition from other forms of entertainment, and persistent underfunding have resulted in revenue declining over the past five years.

Visits to establishments in the Nature Parks and Other Similar Institutions industry depend on several factors, including per capita disposable income, consumer leisure time, and establishment entrance fees, among others. Since visiting state and national parks is a leisure activity, spending at parks and other industry establishments is considered discretionary and depends on consumers' levels of per capita disposable income. Moreover, when consumers have greater discretionary income, they are more likely to visit industry establishments that are farther away from their homes and spend more on concessions and other activities per visit. Conversely, when disposable income levels decline, Americans and foreigners are more likely to visit parks that do not charge entrance fees and keep additional spending to a minimum to curb expenses.

Revenues from 2015 to 2020 in the **All Other Amusement and Recreation Industries** were expected to increase by an annualized rate of 3.1% to $15.0 billion in 2020. Operators in these industries are primarily comprised of golf driving ranges, family fun centers, miniature golf centers, go-kart tracks, and batting cages. A rise in the number of domestic trips, despite being partially offset by declines in sport participation rates, has bolstered industry demand. As more families and individuals travel, they tend to spend on admission fees, food, beverages, and other related services offered by industry operators, contributing directly to revenue growth. Conversely, the industry has also experienced increased competition from alternative entertainment options, resulting in stifled profit growth for many industry operators.

Factors determining demand for All Other Amusement and Recreation Industries include household disposable income, consumer confidence, seasonal and weather conditions, leisure time availability, awareness of health and fitness, sports participation rates, and the cost of alternative entertainment facilities.

Local and Regional Industry Trends

Museums have grown by 77% or 27 jobs in the Regional Study Area, and by 16% or 71 jobs in Maine since 2015. There are currently fewer than 10 jobs in the industry in Skowhegan.

Zoo and Botanical Gardens industry jobs have grown by 60% or 51 jobs in Maine since 2015, but the industry is currently non-existent in Skowhegan and the Regional Study Area.

The **Amusement Arcade industry** has grown by 30% or 24 jobs in Maine since 2015, and by 42% or 10,200 jobs in the United States since 2015; but the industry currently has no presence in Skowhegan or the Regional Study Area.

APPENDIX #1 – FOOD AND BEVERAGE MARKET INDUSTRY DATA

The following tables contain industry data for the food and beverage market industries referenced in this report. Local and regional industry data was acquired from Emsi (Economic Modeling, LLC) which uses data compiled from several sources, including the US Census Bureau and the US Departments of Health and Labor. Using specialized proprietary processes and models, Emsi provides estimates on current statistics and predicts future trends.

National industry trends are also identified to give further insight into broader industry considerations and trends. National industry research is primarily based on data from IBISWorld, which is one of the world's leading publishers of business intelligence, specializing in industry and procurement research.

Food and Beverage Market Industries, United States (2020)							
NAICS	Description	Establishments	Revenue ($m)	Annual Revenue Growth (2015-2020)	Exports ($m)	Imports ($m)	Domestic Demand ($m)
Beverage Production and Manufacturing							
31212	Breweries	7,813	29,837	-2.7%	2,751	5,582	32,668
31213	Wineries	7,140	26,125	3.6%	1,393	9,442	34,174
31214	Distilleries	1,715	14,778	2.7%	1,548	7,725	20,955
31211	Soft Drink and Ice Manufacturing	574	40,135	-3.6%	1,082	3,112	42,166
31192	Coffee and Tea Manufacturing	3,759	14,471	1.5%	1,064	6,214	19,621
Crop and Animal Production, Processing, and Wholesale							
11100	Crop Production*	44,753	20,404	-0.1%	3,334	9,803	26,873
11200	Animal Production	784,010	65,525	-5.2%	434	1,539	66,630
31161	Animal Slaughtering and Processing	6,193	232,113	-0.3%	22,071	10,918	220,960
31171	Seafood Product Preparation and Packaging	3,013	14,835	0.0%	300	3,645	1,608
42459	Other Farm Product Raw Material Merchant Wholesalers	N/A	N/A	N/A	N/A	N/A	N/A
42446	Fish and Seafood Merchant Wholesalers	3,548	19,024	-0.2%	N/A	N/A	N/A
42447	Meat and Meat Product Merchant Wholesalers	2,343	83,538	2.6%	N/A	N/A	N/A
42444	Poultry and Poultry Product Merchant Wholesalers	803	12,395	-1.8%	N/A	N/A	N/A
42448	Fresh Fruit and Vegetable Merchant Wholesalers	8,725	92,556	0.3%	N/A	N/A	N/A
49313	Farm Product Warehousing and Storage	575	875	0.2%	N/A	N/A	N/A
42452	Livestock Merchant Wholesalers	1,295	6,982	-0.8%	N/A	N/A	N/A
42451	Grain and Field Bean Merchant Wholesalers*	10,311	198,583	-3.9%	N/A	N/A	N/A
31142	Fruit and Vegetable Canning, Pickling, and Drying	4,250	44,370	-0.5%	3,855	7,482	47,997
Food Manufacturing							
31121	Flour Milling and Malt Manufacturing	755	18,652	1.4%	2,387	2,743	19,008
31122	Starch and Vegetable Fats and Oils Manufacturing	347	61,687	-1.8%	9,888	8,666	60,464
31123	Breakfast Cereal Manufacturing*	95	10,100	-1.1%	697	568	818
31131	Sugar Manufacturing	84	10,560	0.6%	271	1,877	12,166
31134	Nonchocolate Confectionery Manufacturing	1,348	9,686	1.8%	654	2,192	11,226
31135	Chocolate and Confectionery Manufacturing	3,503	19,434	0.9%	1,790	4,399	22,043
31141	Frozen Food Manufacturing	780	35,676	1.1%	1,935	3,894	37,636
31151	Dairy Product (except Frozen) Manufacturing	1,270	116,140	0.3%	5,906	3,177	113,411
31152	Ice Cream and Frozen Dessert Manufacturing	459	8,436	0.5%	253	82	8,264
31181	Bread and Bakery Product Manufacturing	29,694	45,774	0.2%	1,639	4,171	48,307
31182	Cookie, Cracker, and Pasta Manufacturing	2,132	24,141	-2.5%	612	980	24,509
31183	Tortilla Manufacturing	1,137	5,716	5.4%	N/A	N/A	N/A
31191	Snack Food Manufacturing	3,376	44,866	2.1%	1,611	972	44,227
31193	Flavoring Syrup and Concentrate Manufacturing	692	11,798	1.4%	318	3,573	15,054
31194	Seasoning and Dressing Manufacturing	3,857	24,514	3.1%	1,861	2,309	24,963
31199	All Other Food Manufacturing	1,620	32,077	2.0%	5,392	3,981	30,666
General Food and Beverage Wholesale							
42441	General Line Grocery Merchant Wholesalers	4,778	227,404	1.8%	N/A	N/A	N/A
42442	Packaged Frozen Food Merchant Wholesalers	5,974	145,584	-0.1%	N/A	N/A	N/A
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers	3,725	89,030	4.6%	N/A	N/A	N/A
42445	Confectionery Merchant Wholesalers	6,800	54,808	0.5%	N/A	N/A	N/A
42449	Other Grocery and Related Products Merchant Wholesalers	29,864	358,878	1.6%	N/A	N/A	N/A
42481	Beer and Ale Merchant Wholesalers	4,624	74,444	1.9%	N/A	N/A	N/A
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	6,825	110,289	2.6%	N/A	N/A	N/A
Retail Food and Beverage							
44511	Supermarkets and Other Grocery (except Convenience) Stores	65,947	681,962	1.2%	N/A	N/A	N/A
44512	Convenience Stores	40,482	29,464	1.1%	N/A	N/A	N/A
44521	Meat Markets	8,562	7,246	-1.0%	N/A	N/A	N/A
44522	Fish and Seafood Markets	4,585	2,873	1.5%	N/A	N/A	N/A
44523	Fruit and Vegetable Markets	12,376	5,627	2.2%	N/A	N/A	N/A
44529	Other Specialty Food Stores	47,586	10,097	-1.4%	N/A	N/A	N/A
44531	Beer, Wine, and Liquor Stores	45,952	61,763	2.2%	N/A	N/A	N/A
Prepared Food and Beverage							
72231	Food Service Contractors	63,811	53,019	1.9%	N/A	N/A	N/A
72232	Caterers	128,653	13,415	2.3%	N/A	N/A	N/A
72233	Mobile Food Services*	69,689	3,582	6.5%	N/A	N/A	N/A
72241	Drinking Places (Alcoholic Beverages)*	62,931	27,836	2.1%	N/A	N/A	N/A
72251	Restaurants and Other Eating Places	181,838	170,463	1.0%	N/A	N/A	N/A

Source: IBISWorld

**2020 data unavailable. If availabile, data refelects figures for 2019 and annual revenue growth reflects 2014-2019 figure.*

NAICS	Description	2015 Jobs	2020 Jobs	% of 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Food & Beverage Market Industries - Town of Skowhegan (2015-2020)							
Beverage Production and Manufacturing							
31212	Breweries	27	24	3%	(3)	(11%)	7.2
31213	Wineries	-	-	0%	-	0%	-
31214	Distilleries	-	-	0%	-	0%	-
31211	Soft Drink and Ice Manufacturing	-	-	0%	-	0%	-
31192	Coffee and Tea Manufacturing	-	-	0%	-	0%	-
Crop and Animal Production, Processing, and Wholesale							
11100	Crop Production	55	47	6%	(8)	(15%)	1.7
11200	Animal Production	20	16	2%	(4)	(20%)	1.1
31161	Animal Slaughtering and Processing	-	-	0%	-	0%	-
31171	Seafood Product Preparation and Packaging	-	-	0%	-	0%	-
42459	Other Farm Product Raw Material Merchant Wholesalers	-	-	0%	-	0%	-
42446	Fish and Seafood Merchant Wholesalers	-	-	0%	-	0%	-
42447	Meat and Meat Product Merchant Wholesalers	-	-	0%	-	0%	-
42444	Poultry and Poultry Product Merchant Wholesalers	-	-	0%	-	0%	-
42448	Fresh Fruit and Vegetable Merchant Wholesalers	<10	-	0%	Insf. Data	Insf. Data	-
49313	Farm Product Warehousing and Storage	-	-	0%	-	0%	-
42452	Livestock Merchant Wholesalers	-	-	0%	-	0%	-
42451	Grain and Field Bean Merchant Wholesalers	-	-	0%	-	0%	-
31142	Fruit and Vegetable Canning, Pickling, and Drying	-	-	0%	-	0%	-
Food Manufacturing							
31121	Flour Milling and Malt Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.7
31122	Starch and Vegetable Fats and Oils Manufacturing	-	-	0%	-	0%	-
31123	Breakfast Cereal Manufacturing	-	-	0%	-	0%	-
31131	Sugar Manufacturing	-	-	0%	-	0%	-
31134	Nonchocolate Confectionery Manufacturing	-	-	0%	-	0%	-
31135	Chocolate and Confectionery Manufacturing	-	-	0%	-	0%	-
31141	Frozen Food Manufacturing	-	23	3%	23	Insf. Data	6.0
31151	Dairy Product (except Frozen) Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.3
31152	Ice Cream and Frozen Dessert Manufacturing	37	35	4%	(2)	(5%)	45.1
31181	Bread and Bakery Product Manufacturing	43	43	5%	-	0%	4.6
31182	Cookie, Cracker, and Pasta Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.4
31183	Tortilla Manufacturing	<10	-	0%	Insf. Data	Insf. Data	-
31191	Snack Food Manufacturing	-	-	0%	-	0%	-
31193	Flavoring Syrup and Concentrate Manufacturing	-	-	0%	-	0%	-
31194	Seasoning and Dressing Manufacturing	-	-	0%	-	0%	-
31199	All Other Food Manufacturing	-	-	0%	-	0%	-
General Food and Beverage Wholesale							
42441	General Line Grocery Merchant Wholesalers	-	-	0%	-	0%	-
42442	Packaged Frozen Food Merchant Wholesalers	-	-	0%	-	0%	-
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers	-	-	0%	-	0%	-
42445	Confectionery Merchant Wholesalers	-	-	0%	-	0%	-
42449	Other Grocery and Related Products Merchant Wholesalers	-	-	0%	-	0%	-
42481	Beer and Ale Merchant Wholesalers	-	-	0%	-	0%	-
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	-	-	0%	-	0%	-
Retail Food and Beverage							
44511	Supermarkets and Other Grocery (except Convenience) Stores	168	168	21%	0	0%	1.9
44512	Convenience Stores	13	<10	Insf. Data	Insf. Data	Insf. Data	1.8
44521	Meat Markets	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.3
44522	Fish and Seafood Markets	<10	<10	Insf. Data	Insf. Data	Insf. Data	9.9
44523	Fruit and Vegetable Markets	0	<10	Insf. Data	Insf. Data	Insf. Data	0.4
44529	Other Specialty Food Stores	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.7
44531	Beer, Wine, and Liquor Stores	<10	19	2%	Insf. Data	Insf. Data	2.7
Prepared Food and Beverage							
72231	Food Service Contractors	-	-	0%	-	0%	-
72232	Caterers	-	-	0%	-	0%	-
72233	Mobile Food Services	-	-	0%	-	0%	-
72241	Drinking Places (Alcoholic Beverages)	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.7
72251	Restaurants and Other Eating Places	380	404	50%	24	6%	1.0
	Grand Total	**768**	**812**	**100%**	**44**	**6%**	

Source: EMSI

Food & Beverage Market Industries - Regional Study Area (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Beverage Production and Manufacturing							
31212	Breweries	28	72	1%	44	157%	1.1
31213	Wineries	18	20	0%	2	11%	0.4
31214	Distilleries	-	<10	Insf. Data	Insf. Data	Insf. Data	0.4
31211	Soft Drink and Ice Manufacturing	64	91	1%	27	42%	1.2
31192	Coffee and Tea Manufacturing	-	<10	Insf. Data	Insf. Data	Insf. Data	0.3
Crop and Animal Production, Processing, and Wholesale							
11100	Crop Production	563	549	4%	(14)	(2%)	1.0
11200	Animal Production	484	421	3%	(63)	(13%)	1.5
31161	Animal Slaughtering and Processing	34	58	0%	24	71%	0.2
31171	Seafood Product Preparation and Packaging	125	128	1%	3	2%	5.4
42459	Other Farm Product Raw Material Merchant Wholesalers	-	-	0%	0	0%	0.0
42446	Fish and Seafood Merchant Wholesalers	41	19	0%	(22)	(54%)	1.1
42447	Meat and Meat Product Merchant Wholesalers	12	14	0%	2	17%	0.4
42444	Poultry and Poultry Product Merchant Wholesalers	12	<10	Insf. Data	Insf. Data	Insf. Data	0.8
42448	Fresh Fruit and Vegetable Merchant Wholesalers	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.0
49313	Farm Product Warehousing and Storage	-	-	0%	-	0%	0.0
42452	Livestock Merchant Wholesalers	-	-	0%	-	0%	0.0
42451	Grain and Field Bean Merchant Wholesalers	<10	-	0%	Insf. Data	Insf. Data	0.0
31142	Fruit and Vegetable Canning, Pickling, and Drying	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
Food Manufacturing							
31121	Flour Milling and Malt Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.0
31122	Starch and Vegetable Fats and Oils Manufacturing	-	-	0%	-	0%	0.0
31123	Breakfast Cereal Manufacturing	-	-	0%	-	0%	0.0
31131	Sugar Manufacturing	-	-	0%	-	0%	0.0
31134	Nonchocolate Confectionery Manufacturing	-	-	0%	-	0%	0.0
31135	Chocolate and Confectionery Manufacturing	27	<10	Insf. Data	Insf. Data	Insf. Data	0.3
31141	Frozen Food Manufacturing	144	161	1%	17	12%	2.6
31151	Dairy Product (except Frozen) Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
31152	Ice Cream and Frozen Dessert Manufacturing	38	56	0%	18	47%	3.5
31181	Bread and Bakery Product Manufacturing	135	186	1%	51	38%	1.0
31182	Cookie, Cracker, and Pasta Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
31183	Tortilla Manufacturing	<10	-	0%	Insf. Data	Insf. Data	0.0
31191	Snack Food Manufacturing	-	-	0%	-	0%	0.0
31193	Flavoring Syrup and Concentrate Manufacturing	-	-	0%	-	0%	0.0
31194	Seasoning and Dressing Manufacturing	-	-	0%	-	0%	0.0
31199	All Other Food Manufacturing	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
General Food and Beverage Wholesale							
42441	General Line Grocery Merchant Wholesalers	177	215	2%	38	21%	1.3
42442	Packaged Frozen Food Merchant Wholesalers	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers	23	<10	Insf. Data	Insf. Data	Insf. Data	0.3
42445	Confectionery Merchant Wholesalers	39	43	0%	4	10%	1.0
42449	Other Grocery and Related Products Merchant Wholesalers	96	88	1%	(8)	(8%)	0.6
42481	Beer and Ale Merchant Wholesalers	297	309	2%	12	4%	3.8
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	86	80	1%	(6)	(7%)	1.3
Retail Food and Beverage							
44511	Supermarkets and Other Grocery (except Convenience) Stores	2,452	2,581	21%	129	5%	1.5
44512	Convenience Stores	277	237	2%	(40)	(14%)	2.2
44521	Meat Markets	21	25	0%	4	19%	0.6
44522	Fish and Seafood Markets	21	20	0%	(1)	(5%)	1.8
44523	Fruit and Vegetable Markets	10	<10	Insf. Data	Insf. Data	Insf. Data	0.2
44529	Other Specialty Food Stores	93	49	0%	(44)	(47%)	0.6
44531	Beer, Wine, and Liquor Stores	65	86	1%	21	32%	0.7
Prepared Food and Beverage							
72231	Food Service Contractors	377	395	3%	18	5%	1.0
72232	Caterers	85	64	1%	(21)	(25%)	0.4
72233	Mobile Food Services	21	29	0%	8	38%	0.7
72241	Drinking Places (Alcoholic Beverages)	108	80	1%	(28)	(26%)	0.3
72251	Restaurants and Other Eating Places	5,753	6,252	50%	499	9%	0.8
	Grand Total	**11,760**	**12,389**	**100%**	**629**	**5%**	

Source: EMSI

Food & Beverage Market Industries - Maine (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Beverage Production and Manufacturing							
31212	Breweries	348	839	1%	491	141%	2.1
31213	Wineries	69	69	0%	-	0%	0.2
31214	Distilleries	111	234	0%	123	111%	3.0
31211	Soft Drink and Ice Manufacturing	821	997	1%	176	21%	2.2
31192	Coffee and Tea Manufacturing	<10	113	0%	Insf. Data	Insf. Data	0.9
Crop and Animal Production, Processing, and Wholesale							
11100	Crop Production	3,268	4,141	5%	873	27%	1.2
11200	Animal Production	1,489	1,448	2%	(41)	(3%)	0.8
31161	Animal Slaughtering and Processing	440	537	1%	97	22%	0.2
31171	Seafood Product Preparation and Packaging	847	720	1%	(127)	(15%)	4.8
42459	Other Farm Product Raw Material Merchant Wholesalers	11	<10	#VALUE!	Insf. Data	Insf. Data	0.2
42446	Fish and Seafood Merchant Wholesalers	1,324	1,418	2%	94	7%	11.2
42447	Meat and Meat Product Merchant Wholesalers	50	50	0%	-	0%	0.2
42444	Poultry and Poultry Product Merchant Wholesalers	18	24	0%	6	33%	0.5
42448	Fresh Fruit and Vegetable Merchant Wholesalers	240	262	0%	22	9%	0.6
49313	Farm Product Warehousing and Storage	<10	<10	#VALUE!	Insf. Data	Insf. Data	0.2
42452	Livestock Merchant Wholesalers	-	-	0%	0	0%	0.0
42451	Grain and Field Bean Merchant Wholesalers	<10	11	0%	Insf. Data	Insf. Data	0.0
31142	Fruit and Vegetable Canning, Pickling, and Drying	413	477	1%	64	15%	1.3
Food Manufacturing							
31121	Flour Milling and Malt Manufacturing	<10	<10	#VALUE!	Insf. Data	Insf. Data	0.0
31122	Starch and Vegetable Fats and Oils Manufacturing	45	60	0%	15	33%	0.5
31123	Breakfast Cereal Manufacturing	-	-	0%	-	0%	0.0
31131	Sugar Manufacturing	-	-	0%	-	0%	0.0
31134	Nonchocolate Confectionery Manufacturing	128	54	0%	(74)	(58%)	0.7
31135	Chocolate and Confectionery Manufacturing	178	183	0%	5	3%	1.0
31141	Frozen Food Manufacturing	979	803	1%	(176)	(18%)	2.1
31151	Dairy Product (except Frozen) Manufacturing	403	413	0%	10	2%	0.8
31152	Ice Cream and Frozen Dessert Manufacturing	78	88	0%	10	13%	0.9
31181	Bread and Bakery Product Manufacturing	1,475	1,654	2%	179	12%	1.5
31182	Cookie, Cracker, and Pasta Manufacturing	135	142	0%	7	5%	0.6
31183	Tortilla Manufacturing	32	<10	#VALUE!	Insf. Data	Insf. Data	0.1
31191	Snack Food Manufacturing	<10	18	0%	Insf. Data	Insf. Data	0.1
31193	Flavoring Syrup and Concentrate Manufacturing	<10	<10	#VALUE!	Insf. Data	Insf. Data	0.0
31194	Seasoning and Dressing Manufacturing	32	30	0%	(2)	(6%)	0.2
31199	All Other Food Manufacturing	426	507	1%	81	19%	1.2
General Food and Beverage Wholesale							
42441	General Line Grocery Merchant Wholesalers	598	645	1%	47	8%	0.6
42442	Packaged Frozen Food Merchant Wholesalers	43	66	0%	23	53%	0.4
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers	157	69	0%	(88)	(56%)	0.5
42445	Confectionery Merchant Wholesalers	259	209	0%	(50)	(19%)	0.8
42449	Other Grocery and Related Products Merchant Wholesalers	889	1,012	1%	123	14%	1.0
42481	Beer and Ale Merchant Wholesalers	907	966	1%	59	7%	1.9
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	347	438	1%	91	26%	1.1
Retail Food and Beverage							
44511	Supermarkets and Other Grocery (except Convenience) Stores	15,320	16,199	19%	879	6%	1.5
44512	Convenience Stores	1,754	1,471	2%	(283)	(16%)	2.2
44521	Meat Markets	175	215	0%	40	23%	0.9
44522	Fish and Seafood Markets	398	362	0%	(36)	(9%)	5.2
44523	Fruit and Vegetable Markets	127	88	0%	(39)	(31%)	0.5
44529	Other Specialty Food Stores	555	495	1%	(60)	(11%)	0.9
44531	Beer, Wine, and Liquor Stores	363	423	0%	60	17%	0.6
Prepared Food and Beverage							
72231	Food Service Contractors	1,621	2,002	2%	381	24%	0.8
72232	Caterers	707	769	1%	62	9%	0.8
72233	Mobile Food Services	174	274	0%	100	57%	1.1
72241	Drinking Places (Alcoholic Beverages)	938	1,158	1%	220	23%	0.6
72251	Restaurants and Other Eating Places	40,925	44,182	51%	3,257	8%	0.9
	Grand Total	**79,659**	**86,364**	**100%**	**6,705**	**8%**	

Source: EMSI

Food & Beverage Market Industries - United States (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Beverage Production and Manufacturing							
31212	Breweries	49,240	92,201	0%	42,961	87%	1.0
31213	Wineries	58,417	74,429	0%	16,012	27%	1.0
31214	Distilleries	11,361	18,819	0%	7,458	66%	1.0
31211	Soft Drink and Ice Manufacturing	94,624	102,072	1%	7,448	8%	1.0
31192	Coffee and Tea Manufacturing	20,537	26,861	0%	6,324	31%	1.0
Crop and Animal Production, Processing, and Wholesale							
11100	Crop Production	839,029	801,957	4%	(37,072)	(4%)	1.0
11200	Animal Production	435,341	434,020	2%	(1,321)	(0%)	1.0
31161	Animal Slaughtering and Processing	488,826	537,293	3%	48,467	10%	1.0
31171	Seafood Product Preparation and Packaging	36,914	35,133	0%	(1,781)	(5%)	1.0
42459	Other Farm Product Raw Material Merchant Wholesalers	8,836	10,234	0%	1,398	16%	1.0
42446	Fish and Seafood Merchant Wholesalers	26,644	29,870	0%	3,226	12%	1.0
42447	Meat and Meat Product Merchant Wholesalers	42,127	50,312	0%	8,185	19%	1.0
42444	Poultry and Poultry Product Merchant Wholesalers	11,048	12,195	0%	1,147	10%	1.0
42448	Fresh Fruit and Vegetable Merchant Wholesalers	95,097	104,298	1%	9,201	10%	1.0
49313	Farm Product Warehousing and Storage	10,552	11,673	0%	1,121	11%	1.0
42452	Livestock Merchant Wholesalers	18,473	18,050	0%	(423)	(2%)	1.0
42451	Grain and Field Bean Merchant Wholesalers	49,593	43,603	0%	(5,990)	(12%)	1.0
31142	Fruit and Vegetable Canning, Pickling, and Drying	83,070	82,160	0%	(910)	(1%)	1.0
Food Manufacturing							
31121	Flour Milling and Malt Manufacturing	19,959	20,260	0%	301	2%	1.0
31122	Starch and Vegetable Fats and Oils Manufacturing	27,283	29,530	0%	2,247	8%	1.0
31123	Breakfast Cereal Manufacturing	12,812	12,439	0%	(373)	(3%)	1.0
31131	Sugar Manufacturing	12,528	12,947	0%	419	3%	1.0
31134	Nonchocolate Confectionery Manufacturing	20,029	22,145	0%	2,116	11%	1.0
31135	Chocolate and Confectionery Manufacturing	40,306	43,831	0%	3,525	9%	1.0
31141	Frozen Food Manufacturing	89,111	92,322	0%	3,211	4%	1.0
31151	Dairy Product (except Frozen) Manufacturing	116,721	132,906	1%	16,185	14%	1.0
31152	Ice Cream and Frozen Dessert Manufacturing	20,533	22,614	0%	2,081	10%	1.0
31181	Bread and Bakery Product Manufacturing	238,815	260,779	1%	21,964	9%	1.0
31182	Cookie, Cracker, and Pasta Manufacturing	56,452	57,333	0%	881	2%	1.0
31183	Tortilla Manufacturing	19,231	20,002	0%	771	4%	1.0
31191	Snack Food Manufacturing	53,589	60,222	0%	6,633	12%	1.0
31193	Flavoring Syrup and Concentrate Manufacturing	10,293	8,758	0%	(1,535)	(15%)	1.0
31194	Seasoning and Dressing Manufacturing	37,233	45,032	0%	7,799	21%	1.0
31199	All Other Food Manufacturing	75,625	95,031	0%	19,406	26%	1.0
General Food and Beverage Wholesale							
42441	General Line Grocery Merchant Wholesalers	233,862	249,976	1%	16,114	7%	1.0
42442	Packaged Frozen Food Merchant Wholesalers	29,870	33,740	0%	3,870	13%	1.0
42443	Dairy Product (except Dried or Canned) Merchant Wholesalers	41,164	38,450	0%	(2,714)	(7%)	1.0
42445	Confectionery Merchant Wholesalers	56,477	61,099	0%	4,622	8%	1.0
42449	Other Grocery and Related Products Merchant Wholesalers	228,907	241,990	1%	13,083	6%	1.0
42481	Beer and Ale Merchant Wholesalers	107,901	115,109	1%	7,208	7%	1.0
42482	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	82,774	93,673	0%	10,899	13%	1.0
Retail Food and Beverage							
44511	Supermarkets and Other Grocery (except Convenience) Stores	2,554,908	2,559,409	13%	4,501	0%	1.0
44512	Convenience Stores	164,285	162,439	1%	(1,846)	(1%)	1.0
44521	Meat Markets	52,537	57,881	0%	5,344	10%	1.0
44522	Fish and Seafood Markets	15,706	16,512	0%	806	5%	1.0
44523	Fruit and Vegetable Markets	45,470	39,454	0%	(6,016)	(13%)	1.0
44529	Other Specialty Food Stores	137,498	129,482	1%	(8,016)	(6%)	1.0
44531	Beer, Wine, and Liquor Stores	161,076	171,758	1%	10,682	7%	1.0
Prepared Food and Beverage Industries Cluster							
72231	Food Service Contractors	513,937	589,856	3%	75,919	15%	1.0
72232	Caterers	210,165	223,305	1%	13,140	6%	1.0
72233	Mobile Food Services	41,051	57,231	0%	16,180	39%	1.0
72241	Drinking Places (Alcoholic Beverages)	382,611	415,549	2%	32,938	9%	1.0
72251	Restaurants and Other Eating Places	10,073,419	11,139,444	56%	1,066,025	11%	1.0
	Grand Total	**18,363,868**	**19,817,687**	**100%**	**1,453,819**	**8%**	

Source: EMSI

APPENDIX #2 – RECREATION MARKET INDUSTRY DATA

The following tables contain industry data for the recreation market industries referenced in this report. Local and regional industry data was acquired from Emsi (Economic Modeling Specialists International), which uses data compiled from several sources, including the US Census Bureau and the US Departments of Health and Labor. Using specialized proprietary processes and models, Emsi provides estimates on current statistics and predicts future trends.

National industry trends are also identified to give further insight into broader industry considerations and trends. National industry research is primarily based on data from IBISWorld, which is one of the world's leading publishers of business intelligence, specializing in industry and procurement research.

National and Maine Specific value-add, employment, and compensation figures was acquired from the US Bureau of Economic Analysis (BEA). BEA is an independent, principal federal statistical agency that promotes a better understanding of the U.S. economy by providing timely, relevant, and accurate economic accounts data in an objective and cost-effective manner.

Recreation Market Industries, United States (2020)							
NAICS	Description	Establishments	Revenue ($m)	Annual Revenue Growth (2015-2020)	Exports ($m)	Imports ($m)	Domestic Demand ($m)
Sporting and Recreation Good Production							
33992	Sporting and Athletic Goods Manufacturing	1,470	9,034	-0.7%	1,311	6,669	14,392
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers	20,316	48,456	1.5%	N/A	N/A	N/A
Retail Recreation							
44121	Recreational Vehicle Dealers	6,814	29,940	-0.3%	N/A	N/A	N/A
45111	Sporting Goods Stores	41,670	44,532	-2.5%	N/A	N/A	N/A
45231	General Merchandise Stores, including Warehouse Clubs and Supercenters	5,777	514,412	-0.3%	N/A	N/A	N/A
Outdoor Recreation Activities							
48799	Scenic and Sightseeing Transportation	9,277	3,464	-4.0%	N/A	N/A	N/A
56152	Tour Operators	10,755	7,076	0.4%	N/A	N/A	N/A
71391	Golf Courses and Country Clubs	10,719	24,926	0.9%	N/A	N/A	N/A
71392	Skiing Facilities	381	3,197	3.0%	N/A	N/A	N/A
71393	Marinas	10,293	5,214	0.7%	N/A	N/A	N/A
71394	Fitness and Recreational Sports Centers	111,977	34,072	0.6%	N/A	N/A	N/A
72121	RV (Recreational Vehicle) Parks and Recreational Camps	15,077	7,484	3.2%	N/A	N/A	N/A
Cultural Institutions and Amusement							
71211	Museums	10,183	14,991	3.9%	N/A	N/A	N/A
71212	Historical Sites	1,934	887	-0.8%	N/A	N/A	N/A
71213	Zoos and Botanical Gardens	399	2,549	1.8%	N/A	N/A	N/A
71219	Nature Parks and Other Similar Institutions	14,429	13,237	-1.8%	N/A	N/A	N/A
71311	Amusement and Theme Parks	627	19,348	1.7%	N/A	N/A	N/A
71312	Amusement Arcades	8,358	3,165	7.3%	N/A	N/A	N/A
71321	Casinos (except Casino Hotels)	306	21,201	1.1%	N/A	N/A	N/A
71329	Other Gambling Industries	2,466	116,448	0.0%	N/A	N/A	N/A
71395	Bowling Centers	3,509	4,466	2.4%	N/A	N/A	N/A
71399	All Other Amusement and Recreation Industries	60,369	15,017	3.1%	N/A	N/A	N/A

Source: IBISWorld

**2020 data unavailable. Data refelects figures for 2019*

Recreation Market Industries - Town of Skowhegan (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Sporting and Recreation Good Production							
33992	Sporting and Athletic Goods Manufacturing	-	-	0%	-	0%	0.0
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers	-	-	0%	-	0%	0.0
Retail Recreation							
44121	Recreational Vehicle Dealers	-	-	0%	-	0%	0.0
45111	Sporting Goods Stores	22	16	6%	(6)	(27%)	1.7
45231	General Merchandise Stores, including Warehouse Clubs and Supercenters	189	188	74%	(1)	(1%)	2.7
Outdoor Recreation Activities							
48711	Scenic and Sightseeing Transportation, Land	-	-	0%	-	0%	0.0
48721	Scenic and Sightseeing Transportation, Water	-	-	0%	-	0%	0.0
48799	Scenic and Sightseeing Transportation, Other	-	-	0%	-	0%	0.0
56152	Tour Operators	<10	-	0%	Insf. Data	Insf. Data	0.0
71391	Golf Courses and Country Clubs	-	-	0%	-	0%	0.0
71392	Skiing Facilities	13	<10	Insf. Data	Insf. Data	Insf. Data	5.1
71393	Marinas	-	-	0%	-	0%	0.0
71394	Fitness and Recreational Sports Centers	30	29	11%	(1)	(3%)	1.2
72121	RV (Recreational Vehicle) Parks and Recreational Camps	-	-	0%	-	0%	0.0
Cultural Institutions and Amusement							
71211	Museums	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
71212	Historical Sites	-	-	0%	-	0%	0.0
71213	Zoos and Botanical Gardens	-	-	0%	-	0%	0.0
71219	Nature Parks and Other Similar Institutions	-	-	0%	-	0%	0.0
71311	Amusement and Theme Parks	-	<10	Insf. Data	Insf. Data	Insf. Data	0.4
71312	Amusement Arcades	-	-	0%	-	0%	0.0
71321	Casinos (except Casino Hotels)	-	-	0%	-	0%	0.0
71329	Other Gambling Industries	-	-	0%	-	0%	0.0
71395	Bowling Centers	<10	<10	Insf. Data	Insf. Data	Insf. Data	2.1
71399	All Other Amusement and Recreation Industries	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.5
	Grand Total	**262**	**253**	**100%**	**(9)**	**(3%)**	

Source: EMSI

Recreation Market Industries - Regional Study Area (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Sporting and Recreation Good Production							
33992	Sporting and Athletic Goods Manufacturing	11	<10	Insf. Data	Insf. Data	Insf. Data	0.2
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers	<10	25	1%	Insf. Data	Insf. Data	0.6
Retail Recreation							
44121	Recreational Vehicle Dealers	51	81	2%	30	59%	2.1
45111	Sporting Goods Stores	188	208	5%	20	11%	1.0
45231	General Merchandise Stores, including Warehouse Clubs and Supercenters	2,048	2,253	51%	205	10%	1.6
Outdoor Recreation Activities							
48711	Scenic and Sightseeing Transportation, Land	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
48721	Scenic and Sightseeing Transportation, Water	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.2
48799	Scenic and Sightseeing Transportation, Other	0	<10	Insf. Data	Insf. Data	Insf. Data	0.3
56152	Tour Operators	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.0
71391	Golf Courses and Country Clubs	187	194	4%	7	4%	0.8
71392	Skiing Facilities	559	521	12%	(38)	(7%)	17.9
71393	Marinas	62	83	2%	21	34%	3.0
71394	Fitness and Recreational Sports Centers	200	191	4%	(9)	(5%)	0.4
72121	RV (Recreational Vehicle) Parks and Recreational Camps	397	413	9%	16	4%	8.5
Cultural Institutions and Amusement							
71211	Museums	35	62	1%	27	77%	0.8
71212	Historical Sites	-	<10	Insf. Data	Insf. Data	Insf. Data	0.1
71213	Zoos and Botanical Gardens	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
71219	Nature Parks and Other Similar Institutions	<10	<10	Insf. Data	Insf. Data	Insf. Data	0.1
71311	Amusement and Theme Parks	-	12	0%	12	Insf. Data	0.1
71312	Amusement Arcades	11	<10	Insf. Data	Insf. Data	Insf. Data	0.1
71321	Casinos (except Casino Hotels)	-	-	0%	-	0%	0.0
71329	Other Gambling Industries	31	19	0%	(12)	(39%)	0.6
71395	Bowling Centers	66	50	1%	(16)	(24%)	1.0
71399	All Other Amusement and Recreation Industries	303	260	6%	(43)	(14%)	1.6
	Grand Total	**4,174**	**4,391**	**100%**	**217**	**5%**	

Source: EMSI

Recreation Market Industries - Maine (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Sporting and Recreation Good Production							
33992	Sporting and Athletic Goods Manufacturing	68	75	0%	7	10%	0.3
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers	79	80	0%	1	1%	0.3
Retail Recreation							
44121	Recreational Vehicle Dealers	180	243	1%	63	35%	1.0
45111	Sporting Goods Stores	1,947	1,826	8%	(121)	(6%)	1.5
45231	General Merchandise Stores, including Warehouse Clubs and Supercenters	8,087	8,894	40%	807	10%	1.0
Outdoor Recreation Activities							
48711	Scenic and Sightseeing Transportation, Land	84	64	0%	(20)	(24%)	1.0
48721	Scenic and Sightseeing Transportation, Water	257	303	1%	46	18%	3.5
48799	Scenic and Sightseeing Transportation, Other	<10	26	0%	Insf. Data	Insf. Data	1.5
56152	Tour Operators	71	82	0%	11	15%	0.5
71391	Golf Courses and Country Clubs	1,452	1,505	7%	53	4%	0.9
71392	Skiing Facilities	1,229	1,255	6%	26	2%	6.9
71393	Marinas	958	1,077	5%	119	12%	5.7
71394	Fitness and Recreational Sports Centers	1,308	1,482	7%	174	13%	0.5
72121	RV (Recreational Vehicle) Parks and Recreational Camps	1,935	2,029	9%	94	5%	6.6
Cultural Institutions and Amusement							
71211	Museums	454	525	2%	71	16%	1.1
71212	Historical Sites	23	23	0%	-	0%	0.3
71213	Zoos and Botanical Gardens	85	136	1%	51	60%	0.7
71219	Nature Parks and Other Similar Institutions	35	29	0%	(6)	(17%)	0.6
71311	Amusement and Theme Parks	193	286	1%	93	48%	0.3
71312	Amusement Arcades	79	103	0%	24	30%	0.6
71321	Casinos (except Casino Hotels)	424	441	2%	17	4%	1.3
71329	Other Gambling Industries	76	71	0%	(5)	(7%)	0.3
71395	Bowling Centers	264	398	2%	134	51%	1.2
71399	All Other Amusement and Recreation Industries	1,181	1,236	6%	55	5%	1.2
	Grand Total	**20,475**	**22,187**	**100%**	**1,712**	**8%**	

Source: EMSI

Recreation Market Industries - United States (2015-2020)							
NAICS	Description	2015 Jobs	2020 Jobs	% of Total 2020 Market Industries Jobs	2015 - 2020 Change	2015 - 2020 % Change	2019 Location Quotient
Sporting and Recreation Good Production							
33992	Sporting and Athletic Goods Manufacturing	49,726	50,055	1%	329	1%	1.0
42391	Sporting and Recreational Goods and Supplies Merchant Wholesalers	54,544	57,636	1%	3,092	6%	1.0
Retail Recreation							
44121	Recreational Vehicle Dealers	40,279	54,273	1%	13,994	35%	1.0
45111	Sporting Goods Stores	319,402	291,367	6%	(28,035)	(9%)	1.0
45231	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,931,011	1,996,240	43%	65,229	3%	1.0
Outdoor Recreation Activities							
48711	Scenic and Sightseeing Transportation, Land	14,357	15,839	0%	1,482	10%	1.0
48721	Scenic and Sightseeing Transportation, Water	17,630	20,098	0%	2,468	14%	1.0
48799	Scenic and Sightseeing Transportation, Other	3,430	3,585	0%	155	5%	1.0
56152	Tour Operators	30,400	32,786	1%	2,386	8%	1.0
71391	Golf Courses and Country Clubs	368,839	381,122	8%	12,283	3%	1.0
71392	Skiing Facilities	36,801	42,941	1%	6,140	17%	1.0
71393	Marinas	39,909	44,590	1%	4,681	12%	1.0
71394	Fitness and Recreational Sports Centers	608,962	733,489	16%	124,527	20%	1.0
72121	RV (Recreational Vehicle) Parks and Recreational Camps	63,630	73,450	2%	9,820	15%	1.0
Cultural Institutions and Amusement							
71211	Museums	91,818	107,348	2%	15,530	17%	1.0
71212	Historical Sites	17,045	16,307	0%	(738)	(4%)	1.0
71213	Zoos and Botanical Gardens	38,682	44,815	1%	6,133	16%	1.0
71219	Nature Parks and Other Similar Institutions	10,241	12,383	0%	2,142	21%	1.0
71311	Amusement and Theme Parks	179,529	199,916	4%	20,387	11%	1.0
71312	Amusement Arcades	24,133	34,387	1%	10,254	42%	1.0
71321	Casinos (except Casino Hotels)	86,604	75,401	2%	(11,203)	(13%)	1.0
71329	Other Gambling Industries	49,606	48,277	1%	(1,329)	(3%)	1.0
71395	Bowling Centers	67,486	72,256	2%	4,770	7%	1.0
71399	All Other Amusement and Recreation Industries	194,497	256,021	5%	61,524	32%	1.0
	Grand Total	**4,338,561**	**4,664,583**	**100%**	**326,022**	**8%**	

Source: EMSI

Outdoor Recreation Value Added, Employment, and Compensation as a Percent of Total (2017)						
	Total Outdoor Recreation Value Added (Thousands of Dollars)	Percent of Total Value Added*	Total Outdoor Recreation Employment	% of Total Employment*	Total Outdoor Recreation Compensation (Thousands of Dollars)	Percent of Total Compensation*
United States	427,189,444	2.2%	5,170,670	3.4%	213,440,905	2.1%
Maine	2,957,847	4.8%	40,720	6.4%	1,373,098	3.8%

Source: U.S Beureau of Economic Analysis
**Based on state level data published on bea.gov, GDP estimates were published on May 1, 2019, compensation estimates were published on March 26, 2019 and employment estimates were published on September 25, 2018.*

Outdoor Recreation Value Added, Selected Industries, Thousands of Dollars (2017)									
	Total Outdoor Recreation Industries	Private industries	Manufacturing	Retail trade	Finance, insurance, real estate, rental, and leasing	Arts, entertainment, and recreation	Accomodations and food service	All other private industries	Government
United States	427,189,444	401,263,550	51,667,166	95,660,596	24,599,990	52,879,893	59,990,341	116,465,567	25,925,894
Maine	2,957,847	2,867,990	328,022	610,533	401,661	228,192	986,874	312,709	89,857

Outdoor Recreation Value Added, Selected Activities, Thousands of Dollars (2017)										
	Total Outdoor Recreation Activities*	Conventional Outdoor Recreation Activities	Boating / Fishing	RVing	Snow Activities	Other Outdoor Recreation Activities	Amusement Parks / Water Parks	Festivals / Sporting Events / Concerts	Game Areas (including Golf and Tennis)	All Other Supporting Outdoor Recreation	Government Expenditures
United States	427,189,444	130,843,864	20,886,503	16,887,771	5,646,013	82,401,718	11,858,821	14,143,242	18,470,569	191,428,668	22,515,194
Maine	2,957,847	905,466	248,946	137,428	75,279	277,110	16,847	22,537	94,552	1,694,895	80,376

Source: U.S Bureau of Economic Analysis
**Total outdoor recreation activites includes core activities, supporting activities, and activities with secondary production that are designated as outdoor recreation.*

DATA SOURCES

PROPRIETARY DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling, LLC. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. Emsi industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on Emsi, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

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PUBLIC DATA SOURCES

U.S BUREAU OF ECONOMIC ANALYSIS (BEA)

BEA is an independent, principal federal statistical agency that promotes a better understanding of the U.S. economy by providing timely, relevant, and accurate economic accounts data in an objective and cost-effective manner. Although a relatively small agency, BEA produces some of the most closely watched and influential economic indicators, such as gross domestic product (GDP) and the trade balance, that directly affect decisions made by policy makers, business leaders, and the American public.

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