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**2022  
UPDATE**



# **THE U.S. ECONOMIC BENEFITS OF HASS AVOCADO IMPORTS FROM MEXICO**



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## 2022 UPDATE: THE U.S. ECONOMIC BENEFITS OF HASS AVOCADO IMPORTS FROM MEXICO

*Report to the Mexican Hass Avocado Import Association (MHAIA) and Asociación de Productores y Empacadores Exportadores de Aguacate de México (APEAM, A.C.)*

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### **Abstract:**

This report updates several previous analyses of the benefits to U.S. and state-level economies flowing from the growing U.S. imports of Hass avocados from Mexico. The two main questions addressed are: (1) What was the extent of the contribution of Mexican Hass avocado imports to the growth of the U.S. national economy and the distribution of those contributions by U.S. industry sector in fiscal year (FY) 2021/22? (2) What were the distribution of those contributions by U.S. state and by industry sectors within those states in FY 2021/22? The national impacts for FY 2021/22 found in this report are compared to those reported previously for 2012, 2015, 2018, and FY 2019/20 to provide an historical perspective on the growing contribution that avocado imports have made to the U.S. economy.

### **Acknowledgements:**

We gratefully acknowledge funding for this project from the Mexican Hass Avocado Import Association (MHAIA) and the Asociación de Productores y Empacadores Exportadores de Aguacate de México (APEAM). We are particularly grateful to Dolora Sillman of MHAIA for providing key data used in this study. Nevertheless, the authors are solely responsible for the content of this report. The findings and conclusions are those of the authors and do not necessarily represent the views of MHAIA, APEAM, or Texas A&M University.



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## Executive Summary

This report updates several previous analyses of the economic benefits of U.S. imports of Hass avocados from Mexico. Those reports concluded that Hass avocado imports from Mexico have had a positive and economically important effect on the U.S. and state economies for the years analyzed. This report seeks to answer two questions: (1) What was the extent of the contribution of Mexican Hass avocado imports to the growth of the U.S. national economy and the distribution of those contributions by U.S. industry sector in fiscal year (FY) 2021/22 (July/June)? (2) What were the distribution of those contributions by U.S. state and by industry sectors within those states in FY 2021/22?

Avocados have become entrenched in the food diets and choices of U.S. consumers. U.S. avocado consumption took off in 1989/90 and skyrocketed by a whopping 612% through 2020/21, an impressive 9.6% average annual growth rate over that period. The result was an increase of per capita consumption from 1.07 lb in 1989/90 to an estimated 9.05 lb in 2020/21. Various forces account for the rather sudden and rapid growth rate of avocado consumption in the United States, including: (1) the growing U.S. Hispanic and Caribbean population; (2) the increasing inclusion of avocados in the U.S. food offerings of both fast-food and white table cloth restaurants; (3) the intersection of the intensifying U.S. consumer trend towards ethnic as well as health-promoting foods and an increasing consumer awareness of the health benefits of avocados; (4) a growing preference by U.S. wholesalers for Mexican Hass avocados because Hass avocados from other sources (Peru, Colombia and elsewhere) are reported to be of lower quality; (5) a reported preference by retail and food service providers for Hass over green skin avocados for consistency, their superior shelf-life, the larger variety of sizes, and the relative ease of determining its ripeness, and (5) the highly effective avocado promotion efforts under the Hass Avocado Promotion, Research and Information Order established in 2002.

Although Michoacán has been the sole Mexican state meeting requirements to export avocados to the United States, Mexican and U.S. authorities reached an agreement in December 2021 on a plan to allow imports from the state of Jalisco which began in August of this year (2022). The opening of U.S. markets to avocados from Jalisco both provides increased diversity in sourcing for U.S. buyers and enhances the ability of the Mexican industry to meet the growing year-round demand for avocados by U.S. consumers.

Imported avocados are packed in the country of origin and shipped to U.S. markets to various buyers. In 2021, nearly 98% of the avocados from Michoacán were trucked to the United States through Texas border crossings. The imported avocados may be transported to U.S. wholesalers (shippers) who distribute them to processors, supermarkets, restaurants, and various other retail establishments. Some imports may be shipped directly to end users. As avocados move from U.S. ports of entry to wholesalers, distributors, processors, and final retail end points along the supply chain, they generate economic growth by stimulating economic activity within the avocado supply chain itself and, as a result, economic activity along associated supply chains with which the avocado import supply chain intersects.

To analyze the extent of the economic stimulus created in the U.S. economy by the import of avocados from Mexico in FY2021/22, this study employs a methodology referred to as “economic contribution analysis.” The analysis is based on the idea that a dollar spent in one sector of an economy stimulates additional economic activity as it circulates through the economy (the multiplier effect). The well-known, widely used, and heavily documented IMPLAN (IMPact analysis for PLANning) input-output system is used to estimate the national and state-level economic contribution of the sale of imported avocados from Mexico through the avocado import supply chain. IMPLAN captures the relationships between industries in the U.S. and state economies and estimates the change in each sector’s sales due to an initial change in final demand for a given industry’s output. The sum of these changes is the industry’s multiplier.

The principal outputs from the analysis are aggregate measures of the contribution of Hass avocado imports from Mexico in FY2021/22 to the value of output, value-added (GDP), employment, labor income, and taxes paid (federal, local, and state-level) at both the national and state-level in that year. The analysis concludes that the contribution of U.S. imports of Mexican Hass avocados to the U.S. economy in FY 2021/22 grew substantially compared to just two years ago. In FY 2021/22, U.S. imports of Mexican Hass avocados contributed the following to the U.S. economy (comparison to FY 2019/20 in parentheses):

- \$11.2 billion in output or spending (\$6.5 billion);
- \$6.1 billion to the U.S. GDP (value-added) (\$4.0 billion);
- 58,299 jobs (33,051 jobs);
- \$3.9 billion in labor income (\$2.2 billion); and
- \$1.3 billion in taxes (\$1.1 billion).

Thus, every dollar of Mexican Hass avocado imports in FY 2021/22 generated \$2.79 dollars in output, \$1.51 in U.S. GDP, and \$0.98 in labor income. Every million dollars of imports generated 14.5 U.S. jobs. Taxes generated by the imports amounted to 32.9% of the value of the imported avocados. California and Texas were the largest state beneficiaries from the economic activity generated by the imports. Much of the economic benefits accrued to the wholesale/retail and service industries at both the state and national levels.

Comparing the economic contribution of Mexican Hass avocado imports in this report for FY 2021/22 to those in previous reports emphasizes the rapidly growing importance of Mexican Hass avocado imports to the U.S. economy over many years. The contribution of U.S. imports of Mexican Hass avocado imports to total U.S. output increased nearly 560% from \$1.7 billion in 2012 to \$11.2 billion in FY 2021/22. Over that same period, the contribution of those imports to the U.S. Gross Domestic Product (GDP) or value added has increased by nearly 410% from \$1.2 billion to \$6.1 billion. The contributions to U.S. labor income, U.S. tax revenues, and employment have also registered dramatic increases (219%, 558%, and 194%, respectively). When aggregated over time, the contributions of Mexican Hass avocado imports to the U.S. economy are not only impressive but economically important.

Once again, the primary implication of this update study is clear and straight forward: Imports of Mexican Hass avocados are pro-growth for the U.S. economy. Given the likely continuing, positive growth path of imports of Mexican Hass avocados, their current contribution to the U.S. economy will only intensify over the years. The easing of phytosanitary restrictions on avocado imports from Mexico in place since 1914 facilitated the growth of not only the Mexican Hass avocado industry over the years but also the U.S. economy as a whole. The prospects for additional imports from Jalisco to meet growing U.S. avocado demand promises to boost the positive impact of imports of Mexican Hass avocados on the U.S. economy. On the other hand, any trade policy or other restrictions on the level of U.S. Mexican Hass avocado imports would have a substantial and growing negative impact on the U.S. economy.

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## **2022 UPDATE: THE U.S. ECONOMIC BENEFITS OF HASS AVOCADO IMPORTS FROM MEXICO**

This report updates several previous analyses of the economic benefits of U.S. imports of Hass avocados from Mexico (Williams, Capps, and Hanselka, 2014 and 2016 and Williams and Hanselka, 2018 and 2020). Those reports concluded that Hass avocado imports from Mexico have had a positive and economically important effect on the U.S. and state economies for the years analyzed. This report seeks to answer two questions: (1) What was the extent of the contribution of Mexican Hass avocado imports to the growth of the U.S. national economy and the distribution of those contributions by U.S. industry sector in fiscal year (FY) 2021/22 (July/June)? (2) What were the distribution of those contributions by U.S. state and by industry sectors within those states in FY 2021/22?

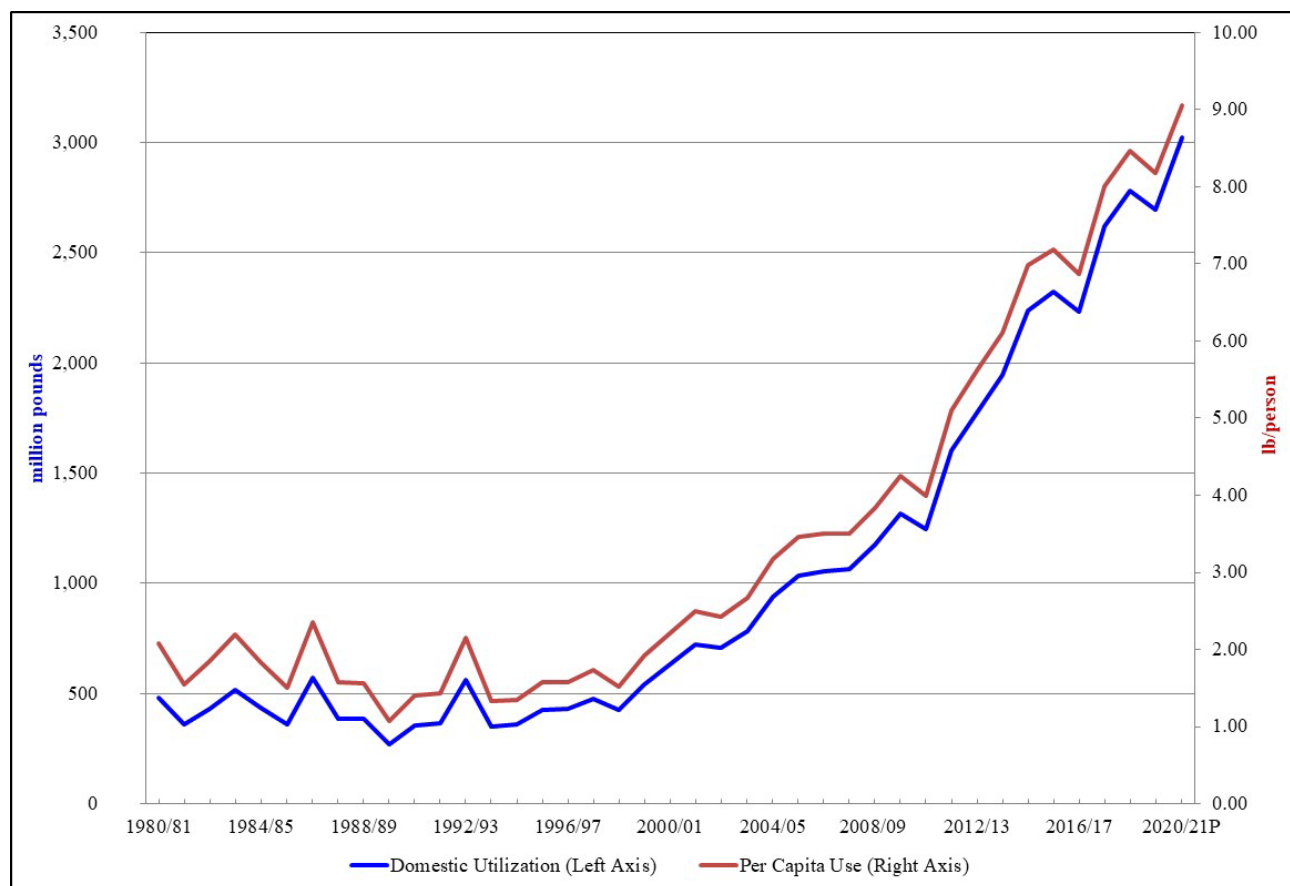
The report begins with an updated overview of the economic dimensions of U.S. Hass avocado imports from Mexico. The methodology used in the analysis is then summarized and any changes in the methodology from previous reports are highlighted. The analytical results are then discussed with a focus on the aggregate, economy-wide impacts on the U.S. economy along with the industry breakdown of those impacts. The state-level impacts are discussed next. Finally, salient conclusions and implications of the analysis are highlighted. The national impacts for FY 2021/22 found in this report are compared with the results reported previously for 2012, 2015, 2018, and FY 2019/20 to provide an historical perspective on the growing contribution that Hass avocado imports have made to the U.S. economy.

### **ECONOMIC DIMENSIONS OF U.S. IMPORTS OF MEXICAN HASS AVOCADOS**

Avocados have become entrenched in the food diets and choices of U.S. consumers. U.S. avocado consumption did not take off until about 1989/90 but then skyrocketed by a whopping 612% through 2020/21, an impressive 9.6% average annual growth rate over that period (Figure 1). The result was an increase of per capita consumption from 1.07 lb in 1989/90 to an estimated 9.05 lb in 2020/21.

More than two dozen varieties of avocados are grown commercially in the United States but Hass avocados now comprise about 95% of all U.S. avocado consumption and are the most widely available. Various forces account for the rather sudden and rapid growth rate of avocado consumption in the United States, including: (1) the growing U.S. Hispanic and Caribbean



**Figure 1: U.S. Domestic Utilization of Avocados, Total and Per Capita, 1980/81-2020/21**

P= Preliminary

Source: Graphic by authors using data from USDA (2021).

population; (2) the increasing inclusion of avocados in the U.S. food offerings of both fast-food and white table cloth restaurants; (3) the intersection of the intensifying U.S. consumer trend towards ethnic as well as health-promoting foods and an increasing consumer awareness of the health benefits of avocados (Ware, 2021); (4) a growing preference by U.S. wholesalers for Mexican Hass avocados because Hass avocados from other sources (Peru, Colombia and elsewhere) are reported to be of lower quality (Miller, 2022); (5) a reported preference by retail and food service providers for Hass over green skin avocados for consistency (Pollack and Perez, 2006), superior shelf-life, larger variety of sizes, and relative ease of determining its ripeness (Johnson, 2021), and (6) the highly effective avocado promotion efforts under the Hass Avocado Promotion, Research and Information Order established in 2002. The most recent economic evaluation of the effectiveness of Hass avocado promotion in the U.S. concluded that the return to those who pay for the promotion ranges between \$1.64 and \$3.62 per dollar spent on promotion, “strong evidence” of the effectiveness of avocado promotion programs (Ambrozek,

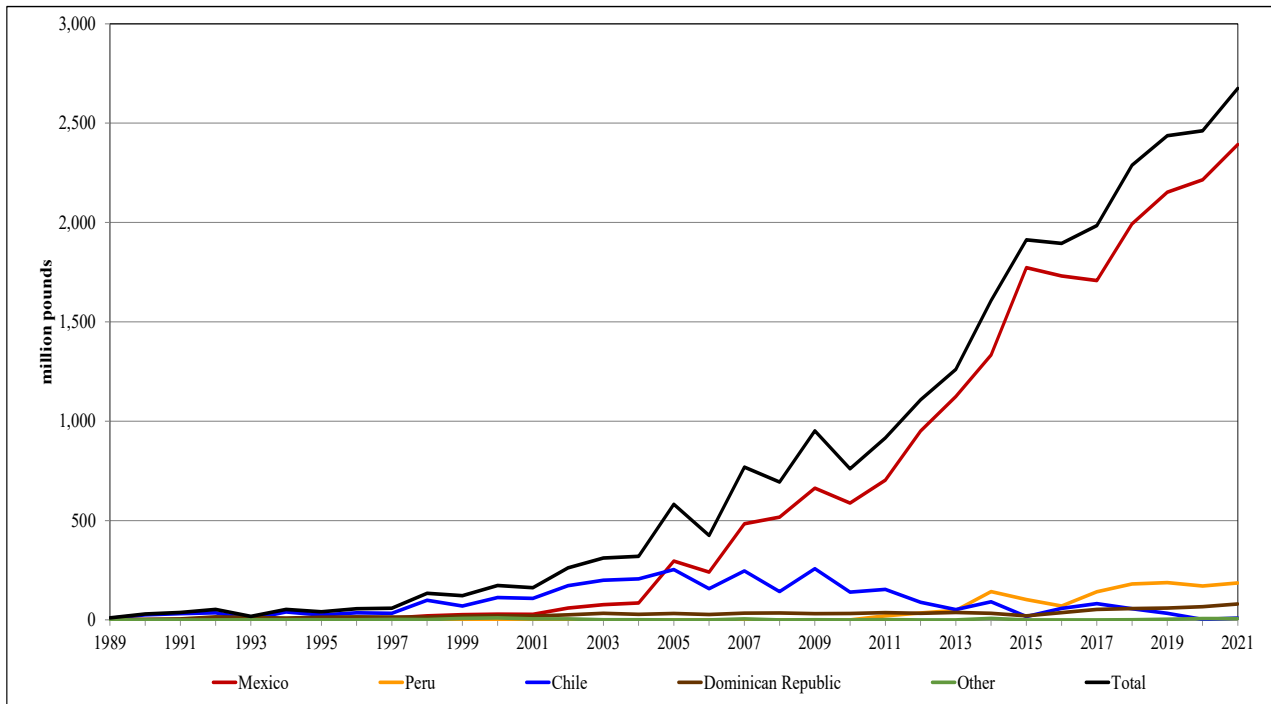
Saitone, and Sexton, 2018). Avocados from Mexico (AFM), a cooperative venture between the Mexican Hass Avocado Import Association (MHAIA) in the United States and the Association of Avocado Producer and Packer Exporters of Mexico (APEAM), conducts the largest share of avocado promotion in U.S. markets. Among many other means of promotion, AFM utilizes national media and focuses on major national events such as the Super Bowl, Cinco de Mayo, and others, emphasizing the taste, healthfulness, and versatility of avocados as well as the near year-round availability of avocados from Mexico.

These favorable U.S. demand conditions for avocados began to join forces at about the same time that the U.S. Department of Agriculture (USDA) issued rules in 1997 and 2001 to lift a long-standing phytosanitary ban on avocado imports from Mexico which facilitated the sharp influx of imports to meet the growing U.S. demand that could not be supplied by California's limited capacity to produce avocados (Roberts and Perez, 2006; Carman and Sexton, 2011; Carman, Saitone, and Sexton, 2013; Huang, 2013). The ban was implemented in 1914 to prevent entry of avocado seed weevils into the United States. After a series of appeals, the state of Michoacán was allowed to begin exporting Hass avocados to the United States in 1997. Michoacán produces about 77% of Mexican avocados (Kramer, Simnitt, and Weber, 2022).

Although Michoacán has been the sole Mexican state meeting requirements to export avocados to the United States, Mexican and U.S. authorities reached an agreement in December 2021 on a plan to allow imports from the state of Jalisco beginning in the summer of 2022. The first shipment from Jalisco crossed the U.S. border just last month (August 2022). Jalisco borders Michoacán and is the second largest Mexican avocado producing state, accounting for 10% of Mexican avocado production with its high-density planting and advanced drip irrigated orchards (Kramer, Simnitt, and Weber, 2022). The opening of U.S. markets to avocados from Jalisco both provides increased diversity in sourcing for U.S. buyers and enhances the ability of the Mexican industry to meet the growing year-round demand for avocados by U.S. consumers.

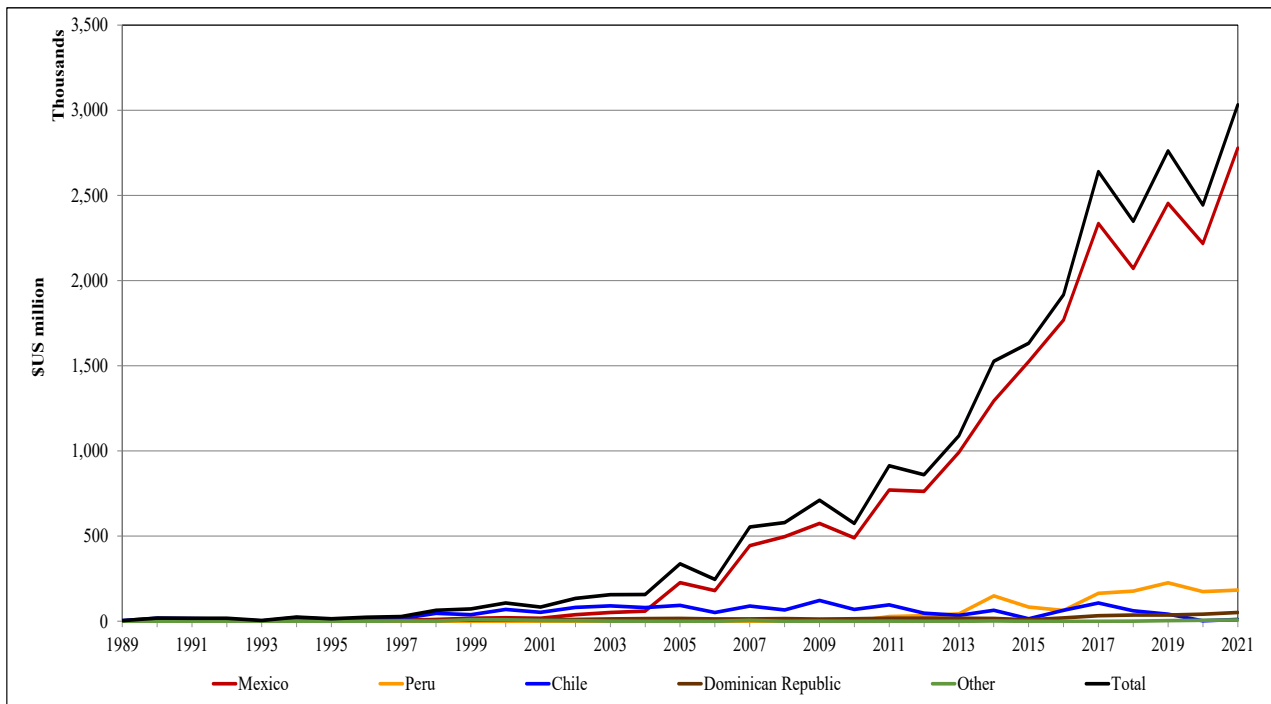
U.S. imports of avocados from all destinations experienced little growth until the late 1990s when the ban on Mexican exports of avocados to the U.S. was eliminated (Figures 2 and 3). Pent up demand for healthy foods rich in nutrients like avocados and other forces subsequently spurred dramatic growth in total imports from 41.0 million pounds in 1995 to 2.7 billion pounds in 2021 (Figure 2). Over that period, Mexico's share of U.S. avocado imports increased from 3.7% to 89.4%. Chile dominated the U.S. avocado market in the 1990s with more than 80% of the low volume of U.S. imports. The dramatic growth of imports from Mexico, however, quashed

**Figure 2: Volume of U.S. Imports of Avocados by Country of Origin, 1989-2021**



Source: Graphics by authors using data from USDA (2022a).

**Figure 3: Value of U.S. Imports of Avocados by Country of Origin, 1989-2021**



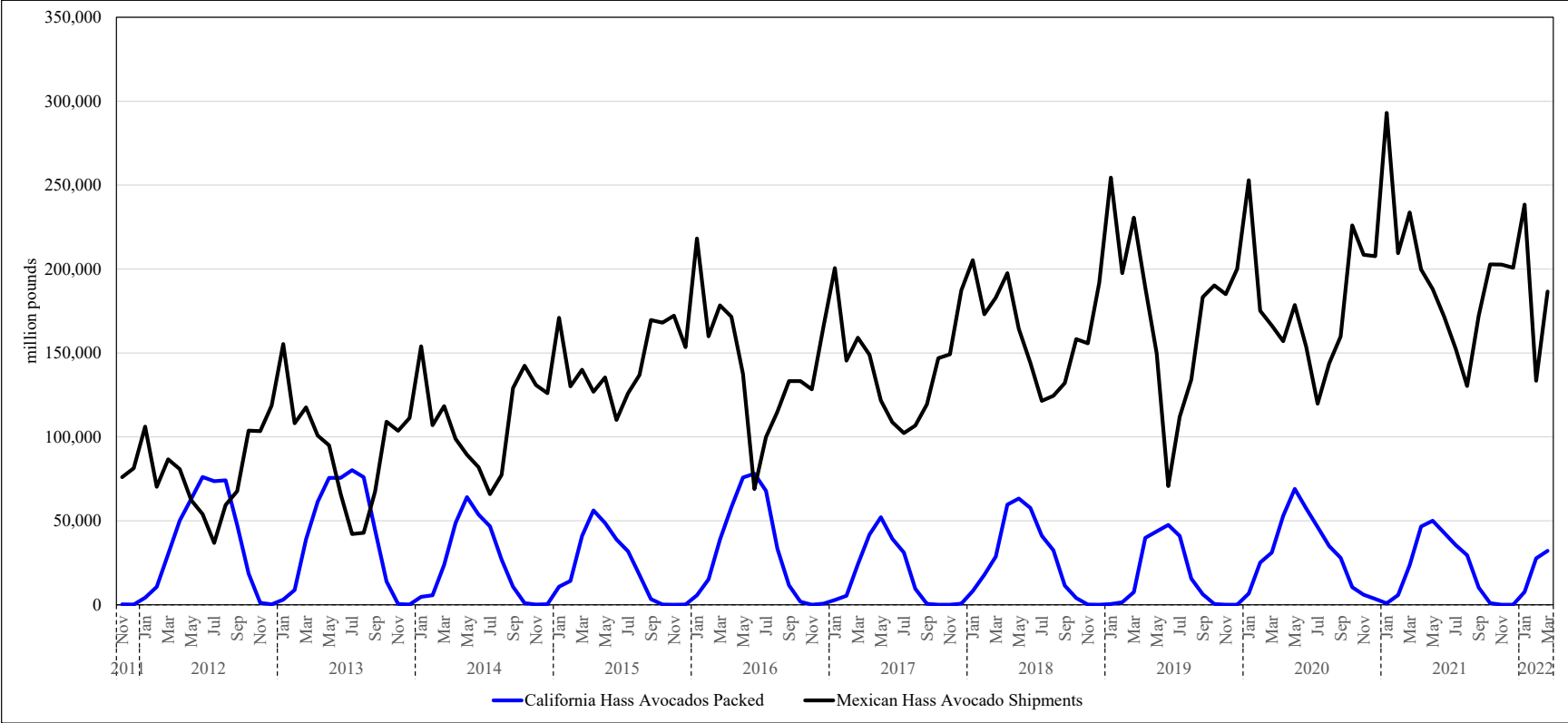
Source: Graphics by authors using data from USDA (2022a).

both the volume and the share of imports from Chile to only 9.0 million pounds and 0.3%, respectively, by 2021. Peru mounted a small surge in avocado exports to the U.S. from virtually nothing in 2010 to 186.4 million pounds in 2021, about 7% of total U.S. imports of avocados. Imports from the Dominican Republic also increasingly inserted into U.S. markets over that same period from 32.7 million pounds to 79.8 million pounds for a 3% share of total imports.

Shipments from Mexico have increased almost consistently from year to year with few disruptions. Two Mexican producer strikes and a drought in 2016 throttled both the volume and value of Mexican shipments to the U.S. in 2016 and 2017 (Figure 2 and 3). The COVID-19 pandemic depressed shipments from Mexico by about 13% in the first 11 weeks of 2020 over the same period in 2019 but then jumped by about 12 % over the following 25 weeks compared to the same period in 2019 (MHAIA, 2022). Despite the pandemic crisis, consumers continued to make healthy choices which included avocados “as a great tasting, healthful, and extremely flexible food item [that] will continue to be the cornerstone of demand expansion, especially in newer, global markets” (Magaña, 2020). Most recently, USDA banned avocado imports from Mexico on February 11, 2022 when an employee of its Animal and Plant Health Inspection Service, who was working in Mexico, received threats after refusing to certify a mislabeled shipment of avocados. With reportedly only a two- to three-week supply stored in U.S. warehouses just prior to the Superbowl, any extended interruption in the supply of avocado from Mexico could have had serious financial consequences all the way up the value chain to consumers and back to Mexican producers. Fortunately, the ban was lifted eight days later and household cooks and restaurant chefs were able “to resume smashing avocados into guacamole, blending them into smoothies and smearing them onto bread without trepidation” (Miller, 2022).

The growth in Mexican import volume and value has been accompanied by a broadening of the seasonal pattern of Mexican imports to almost consistent year-round availability (Carman, Li, and Sexton, 2009; Magaña, 2020). An obvious seasonal pattern exists in shipment volumes from Mexico throughout each year as can be seen in Figure 4. Imports tend to peak in the winter and spring months each year when California avocados are out of season. In fact, monthly Mexican Hass avocado shipments to the U.S. and the volume of Hass avocados packed in California are negatively correlated (correlation coefficient of -0.48). Shipments from Mexico tend to peak during the period around the Super Bowl. Over the years, the monthly and seasonal variability of shipments from Mexico has increased substantially. California, the only domestic supplier of Hass

Figure 4: Monthly Mexican Hass Avocado Shipments vs. California Hass Avocados Packed, November 2011-February 2022



Source: Graphic by authors using data from MHAIA (2022) and HAB (2022).

avocados, has seen the share of U.S. avocado consumption accounted for by its annual production drop from about 99% in 1980/81 before the ban on Mexican Hass avocado imports was lifted to about 12.5% in 2020/21 (calculated from data in USDA, 2021).

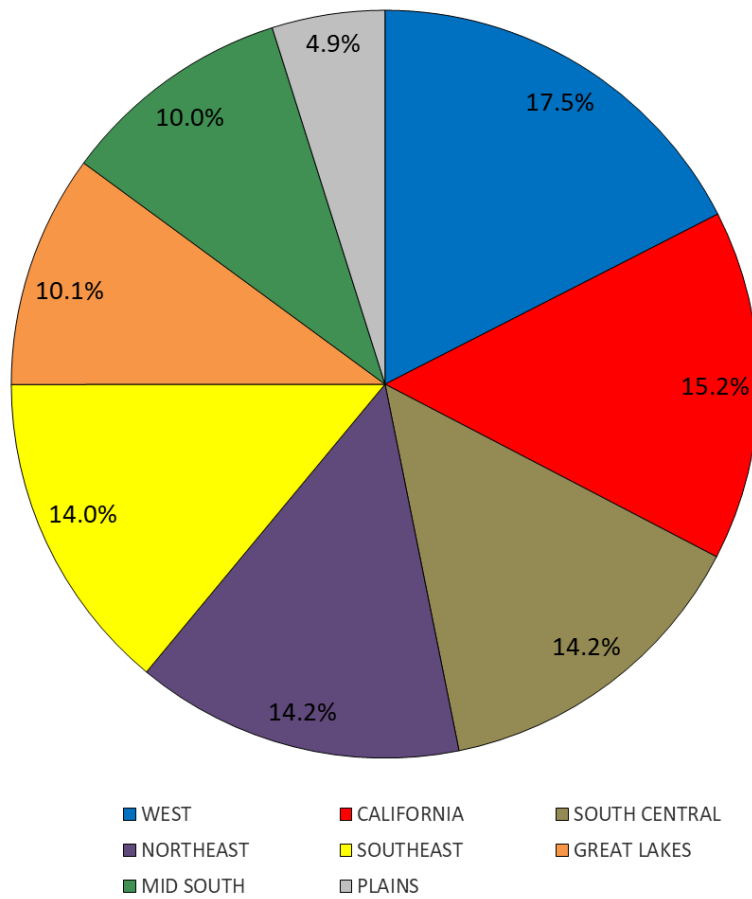
### **State-Level Consumption of Mexican Hass Avocados**

Avocados are consumed in every state of the union. The largest share is consumed in western states and the smallest in southern and plains states. Based on the most recently available avocado sales data from Information Resources, Inc. (IRI) on the retail volume of avocados sold across the eight IRI regions in 2021 (HAB, 2022), the West region (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming) now accounts for the largest share of regional avocado consumption (17.5%) (Figure 5). California jumped from third to second place compared to two years ago with a 15.2% share of regional avocado consumption in 2021. The South Central region (Arkansas, Louisiana, Oklahoma, and Texas) slipped from first place two years ago to third place and basically tied with the Northeast region (Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island), both with 14.2% shares of regional avocado consumption. The Southeast region (Alabama, Florida, Georgia, Mississippi, South Carolina) was close behind with a 14.0% share of regional avocado consumption followed by the Great Lakes region (Illinois, Indiana, Michigan, Ohio, and Wisconsin) with a 10.1% share, the Mid-South region (Delaware, District of Columbia, Kentucky, Maryland, North Carolina, Tennessee, and West Virginia) with 10.0% share, and finally the Plains region (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota) with a 4.9% share.

### **Mexican Hass Avocado Import Supply Chain**

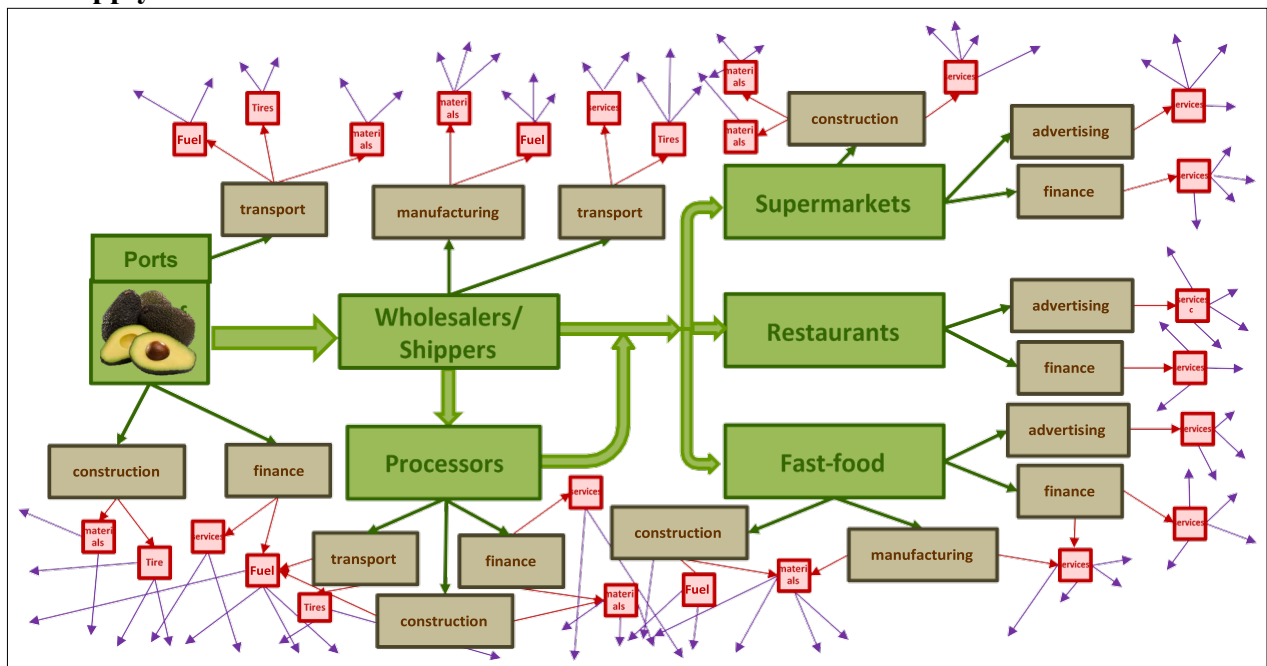
Imported avocados are packed in the country of origin and shipped to U.S. markets to various buyers. In 2021, 98% of the avocados from Michoacán (non-organic and organic) were trucked to the United States through Texas border crossings, primarily Pharr (55.4%) and Laredo (41.7%) (USDA, 2022b). The imported avocados are transported to wholesalers (shippers) and then to distributors, processors, supermarkets, restaurants, fast-food establishments, and elsewhere along the supply chain (Figure 6). As the imports move through the supply chain, they generate economic growth by stimulating economic activity within the avocado supply chain itself and, as a result, economic activity along associated supply chains with which the avocado import supply chain intersects (Figure 6).

Figure 5: Estimated Shares of U.S. Avocado Consumption Volume by Region (%), 2021



Source: Developed by authors from data in HAB (2022).

Figure 6: Economic Multiplier Effects of U.S. Imports of Mexican Hass Avocados through the Supply Chain



For example, avocado shipments passing through U.S. land ports require services from port officials such as the U.S. Customs and Border Protection and other Federal Inspection Agencies responsible for the enforcement of federal laws pertaining to such activities. As the avocados move inland from the ports, the imported avocados stimulate a large number of other economic activities related to transportation, wholesale and retail trade, advertising, construction, finance, manufacturing/processing, infrastructure, and numerous after-market services. The economic activities stimulated at each point in the supply chain not only generate services and jobs at those points but also services and jobs along the supply chains that intersect at those points (Figure 6). For example, the transport of avocados requires fuel. That demand for fuel generates a demand by fuel retailers for fuel from their suppliers who then must demand more fuel from refiners who demand more oil from oil suppliers and so on. At each point on the fuel supply chain, the additional demand for fuel initiated by the shipments of imported avocados contributes to profits and employment. In addition, the suppliers of fuel equipment, transportation services, repair services, and other fuel support services are also all benefited by the additional demand for fuel generated by avocado imports. The same process holds true at each point in the avocado import supply chain resulting in additional economic activity along transportation, wholesaling, retailing, and other supply chains that intersect with the avocado import supply chain.

## METHODOLOGY

In this study, we conduct an economic contribution analysis and focus particularly on the contribution of Hass avocado imports from Mexico in FY 2021/22 to the value of U.S. national and state output, value-added, employment, labor income, and taxes paid (federal, local, and state-level) in that same year. This study first measures the direct, indirect, and induced effects of avocado imports on the U.S. national and then on state economies. The direct effects on the economy are the initial economic activities that are impacted by imports. The direct effects result in two types of secondary effects: (1) indirect and (2) induced. The indirect effects result from the purchase of inputs among local industries as a result of the imports. The induced effects result from the expenditure of institutions such as households and governments benefitting from increased activity among local businesses (IMPLAN, 2022).

The general methodology employed is referred to as “economic contribution analysis” and is based on the idea that a dollar spent in a region/country stimulates additional economic activity or multiplies as it circulates through the economy. To estimate the national and state-level economic contribution of the sale of imported avocados from Mexico through the import supply



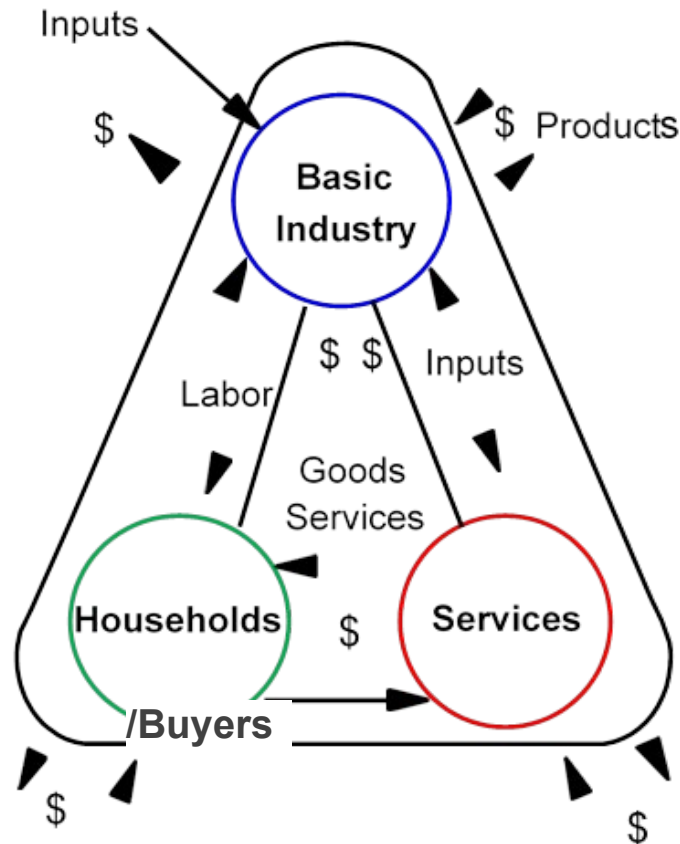
chain, we use the well-known, widely used, and heavily documented IMPLAN (IMpact analysis for PLANning) input-output system (IMPLAN Model, 2022 Application). Input-output analysis is based on the idea that a change in one sector of the economy has effects on other sectors (the multiplier effect). Input-output analysis captures the relationships between industries and estimates the change in each sector's sales due to an initial change in final demand for a given industry's output. The sum of these changes is the industry's multiplier.

To measure impacts, the IMPLAN system produces multipliers which estimate the total economic contribution of expenditures within an economy. Multipliers are calculated based on the purchasing patterns of industries and institutions in the regional economy. Each industry and region combination has a unique spending pattern and a unique multiplier relating to the direct, indirect, and induced effects of the spending.

Four types of economic effects are reported from IMPLAN analyses. The *employment* contribution measures the number of jobs (both full-time and part-time) attributable to the direct economic activity stimulated. The contribution to *labor income* measures the effect of spending by businesses on the incomes of households and indicates a benefit to local residents. The *value-added* measures the impact on gross domestic product (GDP) and indicates the return to resources used by businesses. The *output* contribution measures economic activity (total spending) generated. Labor income is a subset of value-added which is part of output. These four effects provide a better perspective of the contribution of an economic activity like avocado imports but represent separate measures of economic contribution and are not meant to be summed (Clouse, 2022a).

The foundation of a given sector of an economy (such as agriculture or retailing) is those businesses which sell some or all of their goods and services to other business and/or buyers outside of that sector (Woods et al., 2007). Such a business is considered to be a “basic industry” of the sector (Figure 7). The flows of products out of, and dollars into, that sector are represented by the two arrows in the upper right portion of Figure 7. To produce these goods and services for “export” outside the sector, the basic industry purchases inputs from outside of the sector, labor from the residents or “households” in the sector, and inputs from service industries located within the sector. The flow of labor, goods, and services in the sector is completed by households or other buyers using their earnings to purchase goods and services from the sector's service industries. As depicted in Figure 7, a change in any one segment of a sector of the economy will have reverberations throughout the economic system of the sector (Woods et al., 2007). Interactions among sectors creates the national aggregate effects.

**Figure 7: Overview of the Economic System of a Sector of the Aggregate Economy**



Source: Adapted from Woods, McCorkle, and Niemeyer (2007).

### Procedures Followed in the National Aggregate Analysis

The national economic contribution analysis of Hass avocado imports from Mexico to the United States was conducted using an IMPLAN input-output model of the U.S. economy. Using 2019 data for the United States, the IMPLAN software was used to write component information, add structural matrices, create regional absorption tables, commodity balances, market shares, and international transfers, and compute and create multipliers for the U.S. model (IMPLAN Model, 2019 Data) and (Clouse, 2022b).

With the U.S. model constructed, the next step was to determine the IMPLAN sector to use for the analysis of the economic contribution of avocado imports. IMPLAN consists of 544 different sectors from production to transportation, wholesale, manufacturing, retail, services and others. For this particular analysis, industry sector 398 – wholesale – grocery and related product wholesalers was used because this industry sector best reflects the direct impact that Hass avocado imports from Mexico would have on the U.S. economy.

The production function for the wholesale – grocery and related product wholesalers industry sector in the U.S. model was edited to reflect sales of avocados by adjusting the calculated IMPLAN coefficients for the various commodities associated with the 544 possible sectors that contribute to the production function of sector 398. The coefficients calculated by IMPLAN for those associated commodities not directly needed for the operations of the wholesale trade sector, specifically things that are cost of goods sold, were summed up and added to the current IMPLAN coefficient for “commodity 3538 – Noncomparable imports”. After modifying the coefficient for “Noncomparable imports,” the previously mentioned, selected commodity coefficients were set to zero, and the model’s coefficients were re-balanced and saved. With the adjustments made to these coefficients, the model’s multipliers were then re-constructed to reflect these changes in coefficients. The reason for modifying these coefficients (production function) in the wholesale – grocery and related product industry (sector 398) was to enable the results of the model to best reflect the impact of importing rather than domestically producing avocados. Further, these adjustments allow the backward leakages associated with U.S. avocado farming/production to be stopped and not included in the contribution analysis, while still allowing for the impacts of the other backward leakages to be reflected for the other associated industry sectors (transportation, warehousing, storage, etc.).

Next, an “industry change” activity with an event for the wholesale–grocery and related products industry was selected. The value of Mexican Hass avocado imports to the United States for FY 2021/22 was entered as the industry sales for the wholesale – grocery and related product wholesalers sector event within the U.S. model. At this point in the analysis, IMPLAN requests whether gross retail sales or gross retail margin should be selected. For this analysis, gross retail margin was selected in order to best reflect the producer price and not the purchase price. Producer prices are the prices received by the producer for the goods and services that are sold or the prices paid by the store to its suppliers (IMPLAN, 2022). With the avocado import value entered in the model, the analysis of this industry change to the U.S. economy was conducted which entailed selecting and naming a scenario for the given “industry change” activity, analyzing a single region, whereby IMPLAN calculated direct, indirect, and induced impacts.

Finally, summary and industry sector results for the direct, indirect, induced, and total effects for output (total spending), employment (full and part-time jobs), value added (contribution to GDP), labor income (employee compensation), and taxes (local, state, and federal) were reported within the IMPLAN model for this particular industry change activity.

## Procedures Followed in the State-Level Analysis

The same general methodology and procedures used in the aggregate U.S. economic contribution analysis of Mexican Hass avocado imports is used in the analysis of the state-level contributions of those imports. For each state, the FY 2021/22 value of the respective state's imports of Mexican Hass avocado imports was entered into the respective state model as the industry sales for the wholesale-grocery and related product wholesalers sector event. However, the value of avocado imports for each state in FY 2021/22 had to be estimated because state-level import data are not available. The problem is that shipments of any imported commodity like avocados into some states may simply be transported through the state to other destinations (transshipments).

First, the U.S. *regional* avocado consumption values were estimated by multiplying the estimated national value of avocado consumption by the U.S. regional shares of avocado consumption values (dollar sales) in 2021 from the Regional Composite Data published by Symphony Information Resources Inc. Group/FreshLook Marketing (IRI/FreshLook) (HAB, 2022). IRI/FreshLook gathers chain-wide fresh avocado sales data across all major U.S. retail markets. Although the data do not capture 100% of all U.S. avocado sales, the data provide a useful representation of the avocado category by region at the retail level of the marketing channel. The data are used by retailers, shippers, handlers, and others involved in the avocado business to identify opportunities for planning purposes.

The IRI/FreshLook avocado sales data include an aggregation of sales in the grocery, mass, club, drug, dollar, and military channels. IRI/FreshLook gathers and reports chain-wide fresh avocado sales data across all major U.S. retail markets on a calendar quarter basis. The data are organized into and reported for eight U.S. regions, including: (1) California, (2) Great Lakes, (3) Mid-South, (4) Northeast, (5) Plains, (6) South Central, (7) Southeast, and (8) West. These regions include avocado sales data for the major metropolitan markets in those regions plus some additional cities in each region. The major metropolitan markets captured in each of the eight regions include: (1) **California:** Los Angeles; Sacramento; San Diego; and San Francisco; (2) **Great Lakes:** Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; and Detroit, MI; (3) **Mid-South:** Baltimore, MD; Louisville, KY; Memphis, TN; Raleigh, NC; Richmond, VA; and Roanoke, VA; (4) **Northeast:** Albany, NY; Boston, MA; Buffalo, NY; New England; New York; Philadelphia, PA; and Pittsburgh, PA; (5) **Plains:** St. Louis, MO; Omaha, NE; Des Moines, IA; Minneapolis/St. Paul, MN; Kansas City, KS/MO; and Wichita, KS; (6) **South Central:** Dallas, TX; Houston, TX; and Little Rock, AR; (7) **Southeast:** Atlanta, GA; Charlotte,

SC; Columbia, SC; Jacksonville, FL; Miami, FL; Orlando, FL; and Tampa/St. Petersburg, FL; and (8) **West:** Boise, ID; Denver, CO; Las Vegas, NV; Phoenix, AZ; Portland, OR; Seattle, WA; and Spokane, WA. According to these data, the regional avocado shares of the value (dollar sales) of avocado consumption in 2021 were: (1) California - 18.0%, (2) West - 17.2%, (3) Northeast - 15.9%, (4) Southeast - 12.7%, (5) South Central - 11.1%, (6) Mid South - 10.4%, (7) Great Lakes - 10.0%, and (8) Plains - 4.7%. While not identical, these estimated shares of the regional value of avocado consumption are similar to the shares by volume as shown in Figure 5.

For each of the eight regions, the state values of avocado consumption in 2021 were then calculated as a product of the respective estimated regional values of avocado consumption and the shares of each state of the aggregate GDP for the corresponding region (IMPLAN Model, 2019 Data). To account for the fact that California produces and sells avocados across the U.S., the estimated values of state avocado consumption in 2021 were reduced by the value of California avocados consumed in the corresponding state in 2021 to generate the state values of avocado consumption net of the value of California avocados consumed (net state value of avocado consumption). The state values of California avocado consumption were estimated by multiplying the value of California avocado production in 2020/21 as published by the California Avocado Commission (CAC, 2022) by the share of each state of national aggregate GDP (IMPLAN Model, 2019 Data).

Finally, the state values of Mexican Hass avocado imports were estimated by multiplying the value of imports of Mexican Hass avocados in FY 2021/22 (\$4.004 billion) by the share of each state of the aggregate net state value of avocado consumption. The resulting estimates of the value of avocado imports by state for FY 2021/22 are exhibited in Table 1. Not surprisingly, the two top states were California at \$732.9 million and Texas at \$338.7 million. These state figures then formed the inputs into the IMPLAN model for the state-by-state analysis as described above.

### **ANALYSIS OF THE U.S. ECONOMIC BENEFITS FROM IMPORTS OF HASS AVOCADOS FROM MEXICO**

Following a summary of the aggregate economic contributions of Hass avocado imports from Mexico to the U.S. economy, this section discusses the economic contributions of Mexican Hass avocado imports to the economy of individual states. The emphasis is on the contribution of those imports to the value of output, value-added, employment, labor income, and taxes paid (federal, state, and local) at both the national and state levels. Avocado import contribution multipliers are also presented. The multipliers represent the dollar value of the contribution of imports of Mexican Hass

**Table 1: Estimates of State Values of Hass Avocado Imports from Mexico, FY 2021/22**

State	Import Value	State	Import Value
Alabama	\$37,961,914	Montana	\$10,597,122
Alaska	\$11,254,655	Nebraska	\$13,519,560
Arizona	\$74,384,247	Nevada	\$36,078,898
Arkansas	\$20,292,855	New Hampshire	\$8,412,014
California	\$476,570,714	New Jersey	\$61,227,098
Colorado	\$79,278,467	New Mexico	\$21,125,851
Connecticut	\$27,121,293	New York	\$164,443,299
Delaware	\$8,191,679	North Carolina	\$63,837,539
District of Columbia	\$15,879,717	North Dakota	\$6,070,007
Florida	\$179,703,030	Ohio	\$67,527,238
Georgia	\$101,300,490	Oklahoma	\$31,397,198
Hawaii	\$19,760,856	Oregon	\$51,108,486
Idaho	\$16,435,472	Pennsylvania	\$77,242,368
Illinois	\$86,734,284	Rhode Island	\$6,033,169
Indiana	\$36,458,605	South Carolina	\$40,483,310
Iowa	\$20,729,928	South Dakota	\$5,672,934
Kansas	\$18,426,283	Tennessee	\$41,290,818
Kentucky	\$23,317,721	Texas	\$287,516,650
Louisiana	\$40,204,021	Utah	\$38,290,337
Maine	\$6,410,829	Vermont	\$3,302,813
Maryland	\$46,526,409	Virginia	\$60,198,748
Massachusetts	\$56,547,751	Washington	\$121,798,463
Michigan	\$52,357,344	West Virginia	\$8,492,993
Minnesota	\$40,531,585	Wisconsin	\$33,577,702
Mississippi	\$19,522,655	Wyoming	\$8,053,343
Missouri	\$35,341,055	<b>Total</b>	<b>\$2,818,541,818</b>

Source: Developed by authors from data in HAB (2022), CAC (2022), and IMPLAN (IMPLAN Model, 2019 Data).

avocados to U.S. output, U.S. value added, and U.S. labor income per dollar of avocado imports. An employment multiplier is also presented which reflects the number of U.S. jobs generated per million dollars of Hass avocado imports from Mexico. Finally, a tax multiplier is presented which shows the value of all taxes generated at the federal, state, and local levels as a result of all activities stimulated by Hass avocado imports from Mexico as a share of the value of imports. The aggregate economy-wide contributions are also broken down by industry to provide an indication of the industry distribution of the contribution of Hass avocado imports from Mexico to the United States and state-level economies.

## **National Aggregate Analysis Results**

This analysis demonstrates that Hass avocado imports from Mexico have made a substantial contribution to the U.S. economy as they have moved along the U.S. avocado import supply chain generating multiplier effects along intersecting supply chains and adding to U.S. output, value-added, income, jobs and taxes as a result. The total of all the direct, indirect, and induced effects of the \$4.00 billion of U.S. imports of Mexican Hass avocados in FY 2021/22 on U.S. output or total spending amounted to \$11.18 billion (Table 2). That is, the \$4.00 billion of imported Mexican Hass avocados in FY 2021/22 stimulated U.S. economic activity that generated a total of \$11.18 billion in output or total spending. At the same time, the total economic activity stimulated by those imports added nearly \$6.06 billion in FY 2021/22 to the U.S. GDP (about 0.0265% of the U.S. GDP), created \$3.95 billion in U.S. labor income, \$1.32 billion in taxes (federal, state, and local), and added 58,299 jobs (0.028% of U.S. employment).

### ***Implied National Contribution Multipliers***

Every dollar of Mexican Hass avocado imports in FY 2021/22 generated \$2.79 in gross output, \$1.51 in GDP (value-added), and \$0.98 in labor income (Table 3). Every million dollars of those imports generated 14.5 jobs in the U.S. economy. Taxes generated by the imports amounted to 32.9% of the value of the imported avocados (Table 3). Stated in this way, these contributions measure the multiplier effect of the imports. That is, they indicate how much additional output, GDP, etc. is generated by each dollar of imports. For example, for every \$100 million increase in Mexican Hass avocado imports, U.S. output or spending increases by \$279 million while GDP increases by \$151 million, labor income by \$98 million, and employment by 1,455 jobs.

### ***Industry by Industry Breakdown of the National Results***

An industry breakdown of the economic contributions reveals that the wholesale/retail and service industries account for most of the contribution of Mexican imports to U.S. economic activity as might be expected (Table 4). Together those two industries account for 83% of the contribution of imports of Mexican Hass avocados to U.S. gross output, approximately 86% of the contribution to the U.S. GDP (value-added), U.S. employment, and U.S. labor income, and 89% of the contribution to U.S. taxes. The manufacturing industry is also a major beneficiary of U.S. imports of Mexican Hass avocados, accounting for 7.4% of their contribution to gross output and 1% to 4% of the contribution made to GDP, labor income, employment, and taxes. Transportation and

**Table 2: National Economic Contribution of FY2021/22 Hass Avocado Imports from Mexico**

<b>Output</b> (\$ million)	<b>Value-added</b> (\$ million)	<b>Employment</b> (no. of jobs)	<b>Labor Income</b> (\$ million)	<b>Taxes*</b> (\$ million)
\$11,175.7	\$6,062.6 (0.0265% of U.S. GDP)	58,299.0 (0.028% of U.S. employment)	\$3,950.4	\$1,316.3

\* federal, state, local.

**Table 3: Implied National Contribution Multipliers of FY 2021/22 Hass Avocado Imports from Mexico**

<b>Output Multiplier</b> (\$output/\$imports)	<b>Value-added Multiplier</b> (\$VA/\$imports)	<b>Employment Multiplier</b> (jobs added/ \$million imports)	<b>Labor Income Multiplier</b> (\$income/ \$imports)	<b>Tax Multiplier</b> (% of import value)
2.79	1.51	14.5	0.98	32.9%

**Table 4: National Economic Impact of FY 2021/22 Hass Avocado Imports from Mexico by Industry**

<b>Industry</b>	<b>Output</b> (\$ million)	<b>Value-added</b> (\$ million)	<b>Employment</b> (no. of jobs)	<b>Labor Income</b> (\$ million)	<b>Taxes*</b> (\$ million)
<b>Wholesale/Retail</b>	<b>\$4,682.5</b>	<b>\$2,485.7</b>	<b>24,154.7</b>	<b>\$1,761.0</b>	<b>\$178.9</b>
<b>Manufacturing</b>	\$832.2	\$249.8	1,659.3	\$129.1	\$11.4
<b>Transportation &amp; Warehousing</b>	\$476.5	\$257.8	4,278.5	\$201.9	\$10.2
<b>Services</b>	<b>\$4,562.2</b>	<b>\$2,758.5</b>	<b>25,584.9</b>	<b>\$1,666.0</b>	<b>\$162.3</b>
- Food & accommodation	\$269.1	\$157.6	3,351.6	\$101.4	\$19.9
- Other	\$4,293.1	\$2,600.9	22,233.3	\$1,564.6	\$142.4
<b>Agriculture</b>	\$54.0	\$21.4	435.3	\$13.6	-\$1.2
<b>Other</b>	\$568.3	\$289.4	2,186.2	\$178.9	\$20.6
<b>Total**</b>	<b>\$11,175.7</b>	<b>\$6,062.6</b>	<b>58,299.0</b>	<b>\$3,950.4</b>	<b>\$382.1</b>

\* Indirect business taxes. \*\* Totals may not add due to rounding.



Transportation and warehousing and a large number of miscellaneous services (such as advertising, insurance, accounting and legal service, repair services and more) account for much of the remaining contribution of U.S. imports of Mexican Hass avocados to the U.S. economy.

### State-Level Analysis Results

The estimated state contributions of Mexican Hass avocado imports are summarized alphabetically in Table 5. Details of the contributions by industry within each state are provided in the appendix. For this analysis, states were divided into three categories according to the impact of Mexican Hass avocado imports on the respective states' economies: (1) high impact, (2) medium impact, and (3) low impact. Similar criteria for the three categories from previous reports were used in this report. High impact states include those for which imports of Mexican Hass avocados in FY 2021/22 generated more than 3,900 jobs and contributed more than \$300 million to the respective state GDP.

Low impact states include those for which Mexican Hass avocados generated less than 200 jobs and contributed less than \$20 million to the state GDP. Medium impact states are those for which the impacts are between the high- and low-levels. Figure 8 illustrates the state-level impacts of Mexican Hass avocado imports by level of absolute impact on jobs and value added.

The highest impact states, not surprisingly, are California and Texas (green on Figure 8 map). These two states have relatively high GDPs and large populations of Hispanic consumers where Hispanic cuisine is highly popular. In California, Mexican Hass avocado imports in FY 2021/22 generated 7,944 jobs and contributed \$887.3 million to the California state GDP. In Texas, those imports created 3,999 jobs and contributed \$380.3 million to the state GDP.

The medium impact category includes 36 states (blue on Figure 8 map). Most of the medium impact states are located primarily in the West and Great Lakes regions with some states from the Northeast and some from southern regions. Florida, the state with the third largest economic impact of Mexican Hass avocado imports in FY 2021/22 following California and Texas, also registered the largest impact of Mexican Hass avocado imports among the medium impact states with 3,078 jobs created and \$289.7 million contributed to its state GDP. Like California and Texas, Florida has a high state GDP and a Hispanic culture that heavily influences food consumption choices and cooking styles. New York and Washington were not far behind Florida with 2,503 and 1,806 jobs created and \$289.3 million and \$198.7 million, respectively, in GDP created. Rounding out the top ten were Georgia (1,650 jobs created and \$159.6 million in value added), Arizona (1,344 jobs created and \$127.7 million in value added), Pennsylvania (1,338

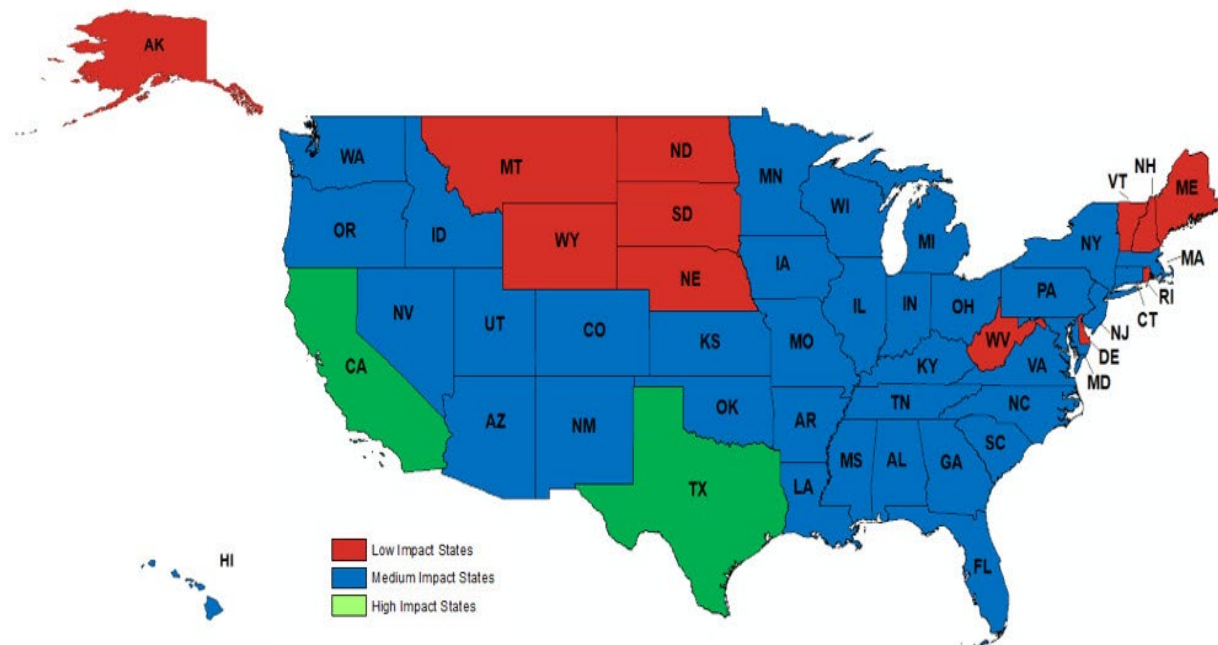
**Table 5: State-Level Economic Contribution of FY2021/22 Mexican Hass Avocado Imports**

State	Total Output	Total Value Added	Total Employment	Total Labor Income	Total Taxes*
	\$ million	\$ million	No. of jobs	\$ million	\$ million
Alabama	\$89.94	\$45.66	541.0	\$30.03	\$9.25
Alaska	\$26.09	\$13.16	149.9	\$9.28	\$2.38
Arizona	\$237.44	\$127.69	1,344.3	\$86.57	\$26.86
Arkansas	\$43.68	\$24.71	232.7	\$16.03	\$4.93
California	\$1,555.74	\$887.31	7,943.9	\$588.91	\$207.19
Colorado	\$244.83	\$132.68	1,337.8	\$91.38	\$27.95
Connecticut	\$79.04	\$46.39	396.1	\$30.90	\$10.53
Delaware	\$24.24	\$13.13	138.8	\$8.90	\$2.76
District of Columbia	\$35.78	\$19.90	180.4	\$14.54	\$3.94
Florida	\$538.49	\$289.74	3,078.1	\$190.35	\$63.78
Georgia	\$291.86	\$159.57	1,649.5	\$101.14	\$32.30
Hawaii	\$46.08	\$23.48	267.4	\$16.15	\$5.00
Idaho	\$46.04	\$23.08	273.2	\$15.54	\$4.69
Illinois	\$257.00	\$149.16	1,321.5	\$98.71	\$31.33
Indiana	\$104.99	\$54.33	624.2	\$37.73	\$10.78
Iowa	\$49.80	\$26.13	288.6	\$18.14	\$5.36
Kansas	\$46.21	\$24.68	256.2	\$16.63	\$4.86
Kentucky	\$67.87	\$35.41	395.7	\$23.64	\$7.13
Louisiana	\$81.84	\$41.65	491.7	\$27.95	\$8.31
Maine	\$21.05	\$10.67	128.5	\$7.29	\$2.34
Maryland	\$134.19	\$73.76	742.2	\$48.92	\$17.33
Massachusetts	\$175.98	\$100.38	909.7	\$71.05	\$21.86
Michigan	\$151.54	\$81.39	861.2	\$56.25	\$16.72
Minnesota	\$107.92	\$61.65	559.9	\$42.68	\$13.36
Mississippi	\$44.99	\$21.68	283.4	\$14.63	\$4.63
Missouri	\$93.32	\$49.76	531.4	\$33.97	\$9.68
Montana	\$29.05	\$14.06	180.1	\$9.94	\$2.89
Nebraska	\$36.10	\$19.77	199.6	\$13.16	\$3.69
Nevada	\$103.92	\$54.52	601.9	\$36.05	\$12.05
New Hampshire	\$25.80	\$14.31	142.0	\$9.67	\$2.88
New Jersey	\$187.79	\$110.16	949.6	\$76.78	\$26.95
New Mexico	\$51.40	\$24.16	320.6	\$16.40	\$5.02
New York	\$496.94	\$289.33	2,503.0	\$196.00	\$67.61
North Carolina	\$210.81	\$110.22	1,226.9	\$74.03	\$22.97
North Dakota	\$13.85	\$7.14	76.7	\$5.27	\$1.33
Ohio	\$202.16	\$109.60	1,139.4	\$73.48	\$22.39
Oklahoma	\$68.05	\$33.65	407.6	\$23.41	\$6.60
Oregon	\$147.91	\$79.35	847.4	\$55.27	\$17.28
Pennsylvania	\$240.49	\$131.62	1,338.4	\$90.46	\$28.91
Rhode Island	\$17.45	\$9.88	94.7	\$6.66	\$2.29
South Carolina	\$102.37	\$53.47	610.3	\$35.39	\$11.80
South Dakota	\$13.97	\$7.23	80.5	\$5.04	\$1.31
Tennessee	\$132.69	\$72.25	740.5	\$49.98	\$14.58
Texas	\$714.86	\$380.28	3,998.9	\$252.67	\$69.29
Utah	\$125.71	\$65.02	718.1	\$44.15	\$13.36
Vermont	\$8.89	\$4.52	53.3	\$3.12	\$0.99
Virginia	\$182.53	\$100.03	998.3	\$63.96	\$21.13
Washington	\$354.68	\$198.69	1,806.0	\$129.43	\$45.01
West Virginia	\$23.54	\$11.85	143.2	\$8.08	\$2.47
Wisconsin	\$94.79	\$49.87	550.3	\$34.49	\$10.61
Wyoming	\$18.18	\$8.41	111.8	\$6.08	\$1.82
<b>Total</b>	<b>\$8,199.84</b>	<b>\$4,496.56</b>	<b>44,766.6</b>	<b>\$3,016.32</b>	<b>\$970.50</b>

\* Federal, State, and Local

Note: The totals across all states do not equal the aggregate U.S. impacts as shown in Table 4. See text for explanation.

**Figure 8: State-Level Absolute Economic Contributions of FY 2021/22 Mexican Hass Avocado Imports**



**High Impact States**  
(> 3,900 jobs and >\$300 million)

	<u>Jobs</u>	<u>VA*</u>
California	7,943.9	\$887.3
Texas	3,998.9	\$380.3

**Medium Impact States**  
(200 - 3,900 jobs and \$20 - \$300 million)

	<u>Jobs</u>	<u>VA*</u>
Florida	3,078.1	\$289.7
New York	2,503.0	\$289.3
Washington	1,806.0	\$198.7
Georgia	1,649.5	\$159.6
Arizona	1,344.3	\$127.7
Pennsylvania	1,338.4	\$131.6
Colorado	1,337.8	\$132.7
Illinois	1,321.5	\$149.2
North Carolina	1,226.9	\$110.2
Ohio	1,139.4	\$109.6
Virginia	998.3	\$100.0
New Jersey	949.6	\$110.2
Massachusetts	909.7	\$100.4
Michigan	861.2	\$81.4
Oregon	847.4	\$79.3
Maryland	742.2	\$73.8
Tennessee	740.5	\$72.3
Utah	718.1	\$65.0
Indiana	624.2	\$54.3
South Carolina	610.3	\$53.5
Nevada	601.9	\$54.5
Minnesota	559.9	\$61.7
Wisconsin	550.3	\$49.9
Alabama	541.0	\$45.7
Missouri	531.4	\$49.8
Louisiana	491.7	\$41.7
Oklahoma	407.6	\$33.7
Connecticut	396.1	\$46.4
Kentucky	395.7	\$35.4
New Mexico	320.6	\$24.2
Iowa	288.6	\$26.1
Mississippi	283.4	\$21.7
Idaho	273.2	\$23.1
Hawaii	267.4	\$23.5
Kansas	256.2	\$24.7
Arkansas	232.7	\$24.7

**Low Impact States**  
(< 200 jobs and < \$20 million)

	<u>Jobs</u>	<u>VA*</u>
Nebraska	199.6	\$19.8
District of Columbia	180.4	\$19.9
Montana	180.1	\$14.1
Alaska	149.9	\$13.2
West Virginia	143.2	\$11.8
New Hampshire	142.0	\$14.3
Delaware	138.8	\$13.1
Maine	128.5	\$10.7
Wyoming	111.8	\$8.4
Rhode Island	94.7	\$9.9
South Dakota	80.5	\$7.2
North Dakota	76.7	\$7.1
Vermont	53.3	\$4.5

\* Value-added in \$ million

jobs created and \$131.6 million in value added), Colorado (1,338 jobs created and \$132.7 million in value added), and Illinois (1,322 jobs created and \$149.2 million in value added).

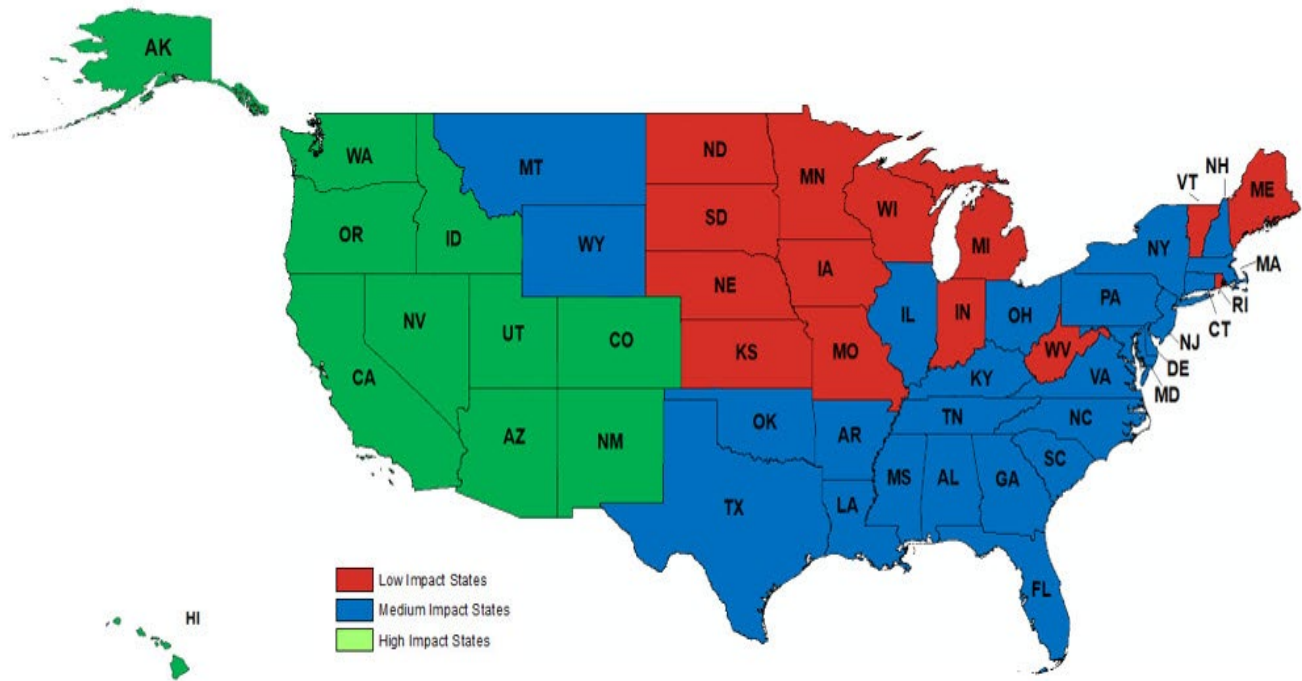
The low impact category included 12 states and the District of Columbia (in red on the map in Figure 8) located primarily in the Plains and Northeast regions (along with Alaska). Nebraska experienced the largest economic impact from FY 2021/22 Mexican Hass avocado imports among the low impact category states (199 jobs created and \$19.8 million in value added).

The state-level contributions to federal, state, and local taxes by Mexican Hass avocado imports followed generally the same pattern as jobs created and value added generated by state. In California and Texas, the imports generated \$207.2 million and \$69.3 million, respectively, in federal, state, and local taxes (see Table 5). In contrast, in the low impact states, the additional federal, state, and local taxes generated ranged from a high of \$3.9 million in the District of Columbia to a low of \$0.99 million in Vermont.

Just one caution about comparing the state-level numbers in Table 5 to the aggregate national numbers shown in Table 4. The total impacts of all of the individual states summed up do not equal the aggregate of the United States in Table 4 for any of the categories in Table 5 (output, employment, labor income, value added, and taxes). The reason is that state-level estimates only capture economic activity that occurs within state boundaries whereas the national-level estimates captures both the impact within states as well as economic activity that crosses state borders, and, thus, will be larger.

The state-by-state categorization of the level of impacts as shown in Figure 8 applies a standard of impact based on the *absolute* size of the value-added and jobs created. The fact that California and Texas are, thus, categorized as the highest impact states is not surprising given that those two states are also the two largest states in the levels of GDP and employment. Alternatively, the states can be categorized based on the *relative* contribution of avocado imports to each state's GDP and employment levels (change in state GDP or employment from avocado imports divided by the state's GDP or employment expressed as a percentage). When categorized in this way, the clustering of states within each category is more distinct (Figure 9). Those states for which the relative contribution of avocado imports to their GDP and employment levels are the highest include all states in the western part of the country including Washington, Colorado, Arizona, Utah, Oregon, Nevada, California, Alaska, Hawaii, New Mexico, and Idaho. Montana is the highest "Medium Impact" state. Medium impact states include primarily states in the south, southeast, the Appalachian area and up through New England with some exceptions. The lowest impact states are primarily those in the plains. The

Figure 9: State-Level Relative Economic Contributions of FY 2021/22 Mexican Hass Avocado Imports



*High Impact States\**

State	Sum of GDP & Employ Shares
Washington	0.0685%
Colorado	0.0654%
Arizona	0.0651%
Utah	0.0636%
Oregon	0.0621%
Nevada	0.0607%
California	0.0587%
Alaska	0.0562%
Hawaii	0.0547%
New Mexico	0.0504%
Idaho	0.0502%

*Medium Impact States\*\**

State	Sum of GDP & Employ Shares
Montana	0.0498%
Georgia	0.0493%
Florida	0.0480%
Wyoming	0.0475%
Texas	0.0414%
South Carolina	0.0410%
Delaware	0.0393%
Alabama	0.0384%
North Carolina	0.0367%
Maryland	0.0364%
Virginia	0.0355%
New York	0.0352%
Tennessee	0.0350%
Mississippi	0.0349%
Louisiana	0.0343%
Massachusetts	0.0342%
Oklahoma	0.0335%
New Jersey	0.0334%
Pennsylvania	0.0327%
Connecticut	0.0326%
District of Columbia	0.0325%
Illinois	0.0324%
Arkansas	0.0311%
Ohio	0.0308%
Kentucky	0.0305%
New Hampshire	0.0303%

*Low Impact States\*\*\**

State	Sum of GDP & Employ Shares
Minnesota	0.0296%
Rhode Island	0.0295%
West Virginia	0.0294%
Michigan	0.0293%
Maine	0.0291%
Indiana	0.0285%
Wisconsin	0.0283%
Nebraska	0.0280%
Missouri	0.0278%
Kansas	0.0259%
Iowa	0.0257%
South Dakota	0.0249%
Vermont	0.0246%
North Dakota	0.0243%

\*  $\geq 0.05\%$  sum of the corresponding state's GDP + Employment Shares

\*\*  $0.03\% - 0.049\%$  sum of the corresponding state's GDP + Employment Shares

\*\*\*  $< 0.03\%$  sum of the corresponding state's GDP + Employment Shares

implication of this method of categorizing the state-level impacts is that avocado imports generate a relatively higher contribution to the economies of the western states and a relatively lower contribution to the plains, central, and northeast quadrants of the country.

### ***Implied State-Level Impact Multipliers***

When the state-by-state benefits of the Mexican Hass avocado imports are expressed on a per-dollar-of-imports basis, the impacts are more uniform across the states (Table 6). Thus, a high dollar value of impact divided by a high level of import value for some states is not much different from a low dollar impact value divided by a low dollar value of imports for other states. The ratio of the value of impact to the value of imports for each state provides a measure of the multiplier effect of the imports. For example, the ratio of value added to import value for a given state indicates the value-added generated for every dollar of Mexican Hass avocados imported into the state. The value-added multipliers range from a high of 1.23 in Illinois to a low of 0.75 in Wyoming. Thus, \$1 of avocado imports into Illinois, for example, generated \$1.23 of value-added in that state. The jobs multiplier (jobs generated per \$million in imports) ranged from highs of 12.5 in Florida and 12.4 in Maine to lows of 7.6 in the District of Colombia, 9.4 in Arkansas, and 9.6 in North Dakota.

### ***Industry by Industry Breakdown of the State-level Impacts***

As with the aggregate U.S. analysis, the industry breakdown of the state-level economic impacts of Mexican Hass avocado imports indicates that the wholesale/retail and service industries account for much of the contribution of imports of Mexican imports to state-level economic activity as might be expected. (See the appendix for the tables showing the industry breakdown of the impacts for all 50 states and the District of Colombia.) The manufacturing industry in most states is also a major beneficiary of state imports of Mexican Hass avocados. Transportation, warehousing, and a large number of miscellaneous services account for much of the remaining contribution of imports of Mexican Hass avocados to state economies.

## **CONCLUSIONS AND IMPLICATIONS**

The primary conclusion from this study is that the contribution of U.S. imports of Mexican Hass avocados to the U.S. economy continues to be substantial and growing. In FY 2021/22, Mexican Hass avocados contributed the following to the U.S. economy (comparison to FY 2019/20 in parentheses):

**Table 6: Implied State-Level Economic Multipliers of FY 2021/22 Mexican Hass Avocado Imports**

State	Total Output \$Output/\$import	Total Value Added \$VA/\$import	Total Employment jobs added/\$million imports	Total Labor Income \$Labor income/\$import	Total Taxes* % of import value
Alabama	1.81	0.92	10.9	0.60	18.62%
Alaska	1.76	0.89	10.1	0.63	16.08%
Arizona	2.14	1.15	12.1	0.78	24.26%
Arkansas	1.77	1.00	9.4	0.65	19.98%
California	2.12	1.21	10.8	0.80	28.27%
Colorado	2.15	1.17	11.8	0.80	24.60%
Connecticut	1.96	1.15	9.8	0.77	26.14%
Delaware	1.93	1.05	11.1	0.71	22.00%
District of Columbia	1.51	0.84	7.6	0.62	16.69%
Florida	2.18	1.18	12.5	0.77	25.88%
Georgia	2.13	1.16	12.0	0.74	23.52%
Hawaii	1.90	0.97	11.0	0.67	20.62%
Idaho	1.81	0.91	10.8	0.61	18.47%
Illinois	2.13	1.23	10.9	0.82	25.94%
Indiana	1.94	1.00	11.5	0.70	19.93%
Iowa	1.80	0.94	10.4	0.66	19.37%
Kansas	1.91	1.02	10.6	0.69	20.05%
Kentucky	1.86	0.97	10.9	0.65	19.56%
Louisiana	1.88	0.96	11.3	0.64	19.08%
Maine	2.04	1.03	12.4	0.71	22.63%
Maryland	1.97	1.08	10.9	0.72	25.45%
Massachusetts	2.04	1.16	10.5	0.82	25.28%
Michigan	2.07	1.11	11.8	0.77	22.86%
Minnesota	2.08	1.19	10.8	0.82	25.76%
Mississippi	1.79	0.86	11.3	0.58	18.41%
Missouri	2.06	1.10	11.7	0.75	21.36%
Montana	1.82	0.88	11.3	0.62	18.10%
Nebraska	1.91	1.04	10.5	0.69	19.49%
Nevada	2.00	1.05	11.6	0.69	23.18%
New Hampshire	1.93	1.07	10.6	0.72	21.56%
New Jersey	2.06	1.21	10.4	0.84	29.52%
New Mexico	1.75	0.82	10.9	0.56	17.12%
New York	1.97	1.15	9.9	0.78	26.85%
North Carolina	2.07	1.08	12.1	0.73	22.57%
North Dakota	1.73	0.89	9.6	0.66	16.71%
Ohio	2.13	1.16	12.0	0.78	23.62%
Oklahoma	1.93	0.95	11.6	0.66	18.70%
Oregon	2.06	1.10	11.8	0.77	24.04%
Pennsylvania	2.11	1.15	11.7	0.79	25.35%
Rhode Island	1.95	1.10	10.6	0.74	25.54%
South Carolina	1.89	0.99	11.2	0.65	21.74%
South Dakota	1.81	0.94	10.4	0.65	16.98%
Tennessee	2.04	1.11	11.4	0.77	22.43%
Texas	2.11	1.12	11.8	0.75	20.46%
Utah	2.12	1.10	12.1	0.74	22.51%
Vermont	1.81	0.92	10.9	0.63	20.11%
Virginia	1.98	1.09	10.9	0.70	22.98%
Washington	1.97	1.11	10.0	0.72	25.03%
West Virginia	1.73	0.87	10.5	0.60	18.22%
Wisconsin	2.01	1.06	11.7	0.73	22.53%
Wyoming	1.62	0.75	10.0	0.54	16.26%

\* Federal, State, and Local

- \$11.2 billion in output or spending (\$6.5 billion);
- \$6.1 billion to the U.S. GDP (value-added) (\$4.0 billion);
- 58,299 jobs (33,051);
- \$3.9 billion in labor income (\$2.2 billion); and
- \$1.3 billion in taxes (\$1.1 billion).

Looked at another way, every dollar of Hass avocado imports from Mexico in FY2021/22 generated \$2.79 dollars in output, \$1.51 in U.S. GDP, and \$0.98 in labor income. Every million dollars of those imports generated 14.5 U.S. jobs. Taxes generated by the imports amounted to 32.9% of the value of the imported avocados

Comparing the economic contribution of Mexican Hass avocado imports in this report for FY 2021/22 to the contribution of those imports measured for 2012, 2015, 2017, and FY 2019/20 as reported in the four previous reports (Williams, Capps, and Hanselka, 2014 and 2016, Williams and Hanselka, 2018 and 2020) reveals a strong and growing importance of Mexican Hass avocado imports to the U.S. economy (Figure 10). While the value of those imports increased by over 300% from \$991.9 million in 2012 to \$4.0 billion in 2021/22, the contribution of those imports to U.S. output increased by nearly 545% from \$1.7 billion to \$11.2 billion. Over the same period, the contribution of those imports to U.S. GDP (value added) increased by 400% from \$1.2 billion to \$6.1 billion. The contributions to U.S. labor income, U.S. tax revenues, and employment also registered dramatic increases (472%, 696%, and 418%, respectively).

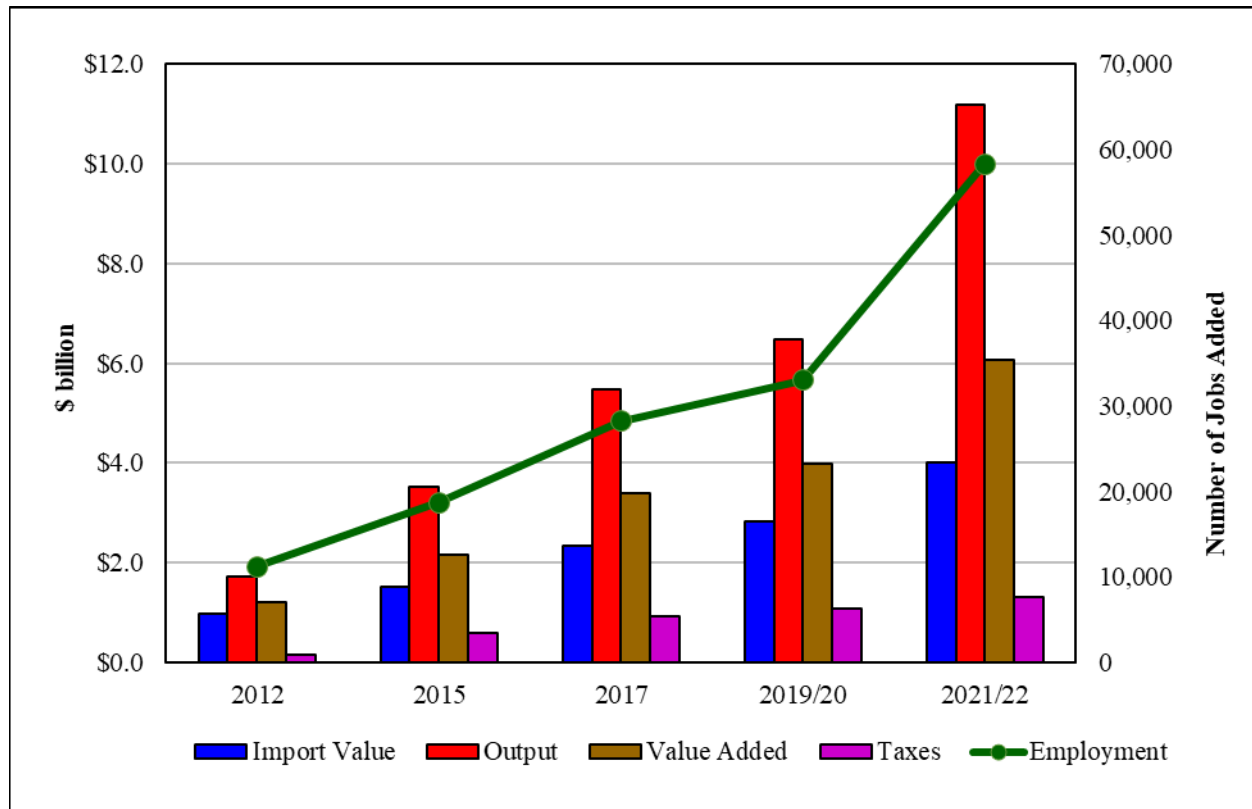
If they continue their current rate of growth, imports of Mexican Hass avocados will continue to make substantial and increasing contributions to the U.S. economy for the foreseeable future. When aggregated over time, the contributions of those imports to the U.S. economy are not only impressive but economically important for the U.S. economy. Note from Figure 10 that after slowing from 2017 to 2019/20 due to Mexican producer strikes, weather problems, COVID-19, and other issues, the rate of increase in the impact of Mexican Hass avocado imports on the U.S. economy jumped dramatically between FY 2019/20 and FY 2021/22 as predicted in the previous report. A primary contributing factor was a strong rebound in U.S. avocado demand over the last two years which led to a record level of Mexican Hass avocado imports in FY 2021/22.

From the state-level analysis, the primary conclusion is that imports of Hass avocados from Mexico have had a positive and significant effect on the economies of many U.S. states. Specifically, with respect to state-level impacts, this study finds the following:

- California and Texas are the largest *absolute* beneficiaries from the economic activity generated by imports of Mexican Hass avocados in FY 2021/22, including 7,944 and 3,999 jobs



**Figure 10: U.S. Economic Contribution of Mexican Hass Avocado Imports, 2012–2021/22**



created and \$887.3 million and \$380.3 million in value added generated in the respective states. In terms of absolute contributions to value added and jobs, the other top ten beneficiary states include, in order, Florida, New York, Washington, Georgia, Arizona, Pennsylvania, Colorado, and Illinois.

- When considering the value of the contribution of Mexican Hass avocados to each state relative to the respective state's GDP and employment, the top *relative* beneficiary states are all in the West, including Washington, Colorado, Arizona, Utah, Oregon, Nevada, California, Alaska, Hawaii, New Mexico, and Idaho. The least relative benefits accrued to Plains and Lake states.
- On a per-dollar-of-imports basis, however, the contributions among states were more uniform. The value added generated for each dollar of imports of Mexican Hass avocados ranged from a high of \$1.23 in Illinois to a low of \$0.75 in Wyoming. The jobs generated per million dollars of imports ranged from highs of 12.5 in Florida and 12.4 in Maine to lows of 7.6 in the District of Columbia, 9.4 in Arkansas, and 9.6 in North Dakota.

Once again, the primary implication of this update study is clear and straight forward. Imports of Mexican Hass avocados continue to be pro-growth for the U.S. economy. Given the likely upward growth path of imports of Mexican Hass avocados, their current positive contribution to the U.S. economy will only intensify over the years. The easing of phytosanitary restrictions on avocado imports from Mexico in place since 1914 facilitated the growth of not only the Mexican Hass avocado industry over the years but also the U.S. economy as a whole. The prospects for additional imports from Jalisco to meet growing U.S. avocado demand promises to continue boosting the already positive impact of imports of Mexican Hass avocados on the U.S. economy. On the other hand, any trade policy or other restrictions on the level of U.S. imports of Mexican Hass avocados would have a substantial and growing negative impact on the U.S. economy.

Clearly, imports of Mexican Hass avocados are also pro-growth for state economies. Some states benefit much more given their larger GDPs and populations and their tendencies towards cuisines that utilize avocados more intensively. As Mexican Hass avocado imports follow a likely, continuing upward growth path over the next several years, the measured benefits to individual state economies will likely grow as well. The consequence of restrictions on those imports would be lost jobs and slower economic growth across individual states.

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**APPENDIX**

**State-by-State Industry Breakdown of the Economic Benefits  
of Mexican Hass Avocado Imports**

Alabama

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$53,708,883	\$26,614,675	295.5	\$18,227,689	\$1,491,433
Manufacturing	\$1,223,795	\$318,971	2.7	\$164,841	\$8,303
Transportation & Warehousing	\$3,676,660	\$1,904,796	35.8	\$1,597,493	\$35,037
Services**	\$27,351,390	\$14,861,649	188.8	\$8,733,132	\$931,084
-Food & accommodation	\$1,456,780	\$710,230	22.5	\$488,172	\$77,734
-Other	\$25,894,610	\$14,151,419	166.3	\$8,244,960	\$853,349
Agriculture	\$62,680	\$23,659	1.3	\$21,642	\$0
Other	\$3,915,298	\$1,941,230	16.9	\$1,282,493	\$105,957
Total**	\$89,938,706	\$45,664,979	541.0	\$30,027,289	\$2,571,814

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Alaska

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$15,699,701	\$7,185,631	91.3	\$5,591,337	\$317,973
Manufacturing	\$244,116	\$83,384	0.4	\$22,058	\$2,082
Transportation & Warehousing	\$1,163,999	\$718,985	8.0	\$549,973	\$17,316
Services**	\$7,710,657	\$4,519,065	45.5	\$2,692,650	\$203,133
-Food & accommodation	\$389,086	\$225,606	5.1	\$162,728	\$5,564
-Other	\$7,321,571	\$4,293,459	40.4	\$2,529,921	\$197,570
Agriculture	\$5,677	\$2,174	0.1	\$2,270	\$0
Other	\$1,262,847	\$647,911	4.6	\$424,892	\$41,055
Total**	\$26,086,998	\$13,157,150	149.9	\$9,283,180	\$581,559

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Arizona

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$124,548,738	\$65,806,959	639.6	\$48,686,814	\$4,076,884
Manufacturing	\$2,119,753	\$634,048	7.1	\$414,073	\$22,389
Transportation & Warehousing	\$10,593,679	\$5,385,460	110.7	\$4,214,162	\$275,651
Services**	\$90,111,849	\$50,382,868	545.3	\$30,069,390	\$3,082,969
-Food & accommodation	\$5,081,927	\$2,866,196	66.4	\$1,855,675	\$393,637
-Other	\$85,029,921	\$47,516,672	478.9	\$28,213,715	\$2,689,331
Agriculture	\$233,554	\$116,600	1.7	\$69,872	\$1,693
Other	\$9,831,097	\$5,360,863	40.0	\$3,116,531	\$318,455
Total**	\$237,438,669	\$127,686,798	1344.3	\$86,570,842	\$7,778,042

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Arkansas

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$26,826,185	\$15,755,599	121.3	\$10,544,001	\$710,497
Manufacturing	\$508,198	\$130,361	1.3	\$71,912	\$5,267
Transportation & Warehousing	\$1,529,098	\$769,115	14.9	\$604,263	\$27,549
Services**	\$13,061,414	\$7,216,883	86.9	\$4,279,481	\$497,650
-Food & accommodation	\$703,930	\$358,278	10.4	\$225,975	\$57,622
-Other	\$12,357,485	\$6,858,606	76.5	\$4,053,506	\$440,028
Agriculture	\$40,371	\$10,747	0.5	\$10,106	\$0
Other	\$1,710,579	\$828,336	7.9	\$522,723	\$76,384
Total**	\$43,675,845	\$24,711,043	232.7	\$16,032,487	\$1,317,348

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

California

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$816,577,873	\$438,995,962	4,057.3	\$313,280,240	\$41,121,469
Manufacturing	\$44,995,430	\$13,748,208	91.8	\$7,133,330	\$596,784
Transportation & Warehousing	\$70,354,504	\$38,518,802	655.4	\$30,040,298	\$1,274,839
Services**	\$575,575,426	\$368,461,651	2,896.3	\$217,831,589	\$18,868,939
-Food & accommodation	\$31,506,996	\$19,211,492	372.1	\$12,825,455	\$2,389,596
-Other	\$544,068,431	\$349,250,159	2,524.2	\$205,006,135	\$16,479,343
Agriculture	\$2,255,052	\$1,170,207	13.3	\$790,088	\$26,288
Other	\$45,983,525	\$26,419,594	229.7	\$19,830,388	\$498,231
Total**	\$1,555,741,810	\$887,314,426	7,943.9	\$588,905,933	\$62,386,551

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Colorado

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$126,773,202	\$66,009,625	656.4	\$49,899,124	\$2,711,391
Manufacturing	\$3,883,439	\$1,178,686	9.6	\$627,885	\$38,632
Transportation & Warehousing	\$9,005,361	\$4,672,041	92.1	\$3,492,208	\$192,149
Services**	\$94,543,612	\$55,207,933	535.0	\$33,498,038	\$3,034,681
-Food & accommodation	\$5,025,339	\$2,863,052	65.9	\$1,863,492	\$428,982
-Other	\$89,518,274	\$52,344,880	469.1	\$31,634,547	\$2,605,699
Agriculture	\$303,624	\$122,631	2.5	\$3,795,919	\$0
Other	\$10,319,686	\$5,487,154	42.3	\$66,278	\$240,573
Total**	\$244,828,924	\$132,678,070	1,337.8	\$91,379,452	\$6,217,425

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Connecticut

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$44,234,638	\$24,580,123	212.2	\$17,246,208	\$1,377,103
Manufacturing	\$534,213	\$185,034	1.6	\$126,351	\$11,495
Transportation & Warehousing	\$2,657,912	\$1,471,770	26.7	\$1,352,408	\$43,186
Services**	\$28,579,351	\$18,416,274	142.0	\$11,105,709	\$1,210,359
-Food & accommodation	\$1,172,253	\$709,500	14.5	\$483,480	\$85,538
-Other	\$27,407,097	\$17,706,774	127.5	\$10,622,229	\$1,124,820
Agriculture	\$18,939	\$12,563	0.3	\$7,331	\$705
Other	\$3,013,835	\$1,728,953	13.2	\$1,064,901	\$140,833
Total**	\$79,038,887	\$46,394,716	396.1	\$30,902,909	\$2,783,681

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Delaware

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$13,601,358	\$6,509,758	76.8	\$5,143,216	\$340,784
Manufacturing	\$171,111	\$34,878	0.2	\$15,168	\$1,734
Transportation & Warehousing	\$1,043,587	\$561,325	10.1	\$467,907	\$11,430
Services**	\$8,587,053	\$5,566,506	47.6	\$2,954,499	\$380,410
-Food & accommodation	\$421,206	\$227,548	6.0	\$163,474	\$12,797
-Other	\$8,165,847	\$5,338,958	41.6	\$2,791,025	\$367,613
Agriculture	\$11,092	\$5,961	0.1	\$6,878	\$0
Other	\$821,206	\$456,254	4.0	\$314,756	\$31,305
Total**	\$24,235,406	\$13,134,682	138.8	\$8,902,423	\$765,663

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

District of Columbia

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$24,458,690	\$12,378,367	126.7	\$9,204,377	\$1,118,458
Manufacturing	\$20,900	\$6,680	0.1	\$4,294	\$307
Transportation & Warehousing	\$482,936	\$211,641	5.7	\$190,243	\$259
Services**	\$9,746,748	\$6,637,996	43.5	\$4,580,558	\$301,464
-Food & accommodation	\$395,994	\$259,512	4.2	\$167,646	\$39,841
-Other	\$9,350,754	\$6,378,484	39.3	\$4,412,912	\$261,623
Agriculture	\$16	\$11	0.0	\$9	\$1
Other	\$1,074,254	\$662,288	4.5	\$563,676	\$52,141
Total**	\$35,783,545	\$19,896,984	180.4	\$14,543,158	\$1,472,630

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Florida

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$278,199,282	\$148,346,306	1,421.5	\$104,426,034	\$10,877,147
Manufacturing	\$6,595,011	\$2,117,612	21.3	\$1,232,499	\$96,999
Transportation & Warehousing	\$23,297,418	\$11,343,227	246.1	\$8,572,943	\$448,194
Services**	\$210,144,923	\$116,353,932	1,307.9	\$69,945,160	\$8,164,462
-Food & accommodation	\$11,295,463	\$6,293,355	151.8	\$3,993,173	\$899,501
-Other	\$198,849,460	\$110,060,578	1,156.1	\$65,951,987	\$7,264,961
Agriculture	\$576,548	\$313,338	5.8	\$178,667	\$5,722
Other	\$19,676,997	\$11,265,692	75.5	\$5,996,358	\$909,736
Total**	\$538,490,179	\$289,740,107	3,078.1	\$190,351,660	\$20,502,260

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding



Georgia

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$153,575,823	\$80,376,503	800.3	\$53,162,163	\$5,757,932
Manufacturing	\$4,593,683	\$1,567,296	13.2	\$833,657	\$43,256
Transportation & Warehousing	\$13,076,027	\$6,764,075	130.3	\$5,210,984	\$212,369
Services**	\$111,052,655	\$65,691,352	661.8	\$38,674,104	\$3,146,091
-Food & accommodation	\$5,510,273	\$2,879,753	79.5	\$1,882,629	\$335,872
-Other	\$105,542,381	\$62,811,599	582.4	\$36,791,475	\$2,810,219
Agriculture	\$284,373	\$116,212	2.0	\$90,216	\$0
Other	\$9,274,287	\$5,050,553	41.8	\$3,169,015	\$406,764
Total**	\$291,856,849	\$159,565,991	1,649.5	\$101,140,138	\$9,566,412

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Hawaii

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$26,419,524	\$11,949,393	154.8	\$9,299,796	\$600,791
Manufacturing	\$530,306	\$132,959	1.3	\$70,062	\$5,217
Transportation & Warehousing	\$1,576,621	\$871,473	13.6	\$601,240	\$46,957
Services**	\$16,226,143	\$9,714,152	89.4	\$5,519,975	\$844,220
-Food & accommodation	\$813,602	\$509,465	9.0	\$310,855	\$57,397
-Other	\$15,412,541	\$9,204,687	80.3	\$5,209,121	\$786,823
Agriculture	\$46,553	\$27,001	1.1	\$22,404	\$81
Other	\$1,278,303	\$781,937	7.3	\$636,021	\$0
Total**	\$46,077,450	\$23,476,915	267.4	\$16,149,498	\$1,497,265

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Idaho

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$27,685,216	\$13,749,195	150.8	\$9,882,456	\$633,788
Manufacturing	\$442,855	\$114,656	1.3	\$73,578	\$4,258
Transportation & Warehousing	\$1,540,147	\$782,718	15.2	\$613,833	\$24,639
Services**	\$14,633,281	\$7,563,707	98.0	\$4,433,711	\$452,921
-Food & accommodation	\$806,544	\$409,900	12.2	\$266,501	\$47,298
-Other	\$13,826,738	\$7,153,806	85.8	\$4,167,210	\$405,623
Agriculture	\$65,899	\$32,784	0.4	\$17,078	\$140
Other	\$1,670,150	\$835,486	7.5	\$515,180	\$41,416
Total**	\$46,037,547	\$23,078,545	273.2	\$15,535,835	\$1,157,162

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Illinois

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$134,256,510	\$76,269,214	632.8	\$53,669,814	\$4,183,420
Manufacturing	\$4,966,056	\$1,584,350	10.5	\$839,556	\$60,915
Transportation & Warehousing	\$10,977,900	\$6,072,173	100.7	\$4,523,172	\$223,871
Services**	\$96,997,695	\$59,991,138	532.0	\$36,050,693	\$4,014,335
-Food & accommodation	\$4,985,916	\$2,874,483	64.0	\$1,842,335	\$456,261
-Other	\$92,011,779	\$57,116,655	468.0	\$34,208,358	\$3,558,074
Agriculture	\$119,197	\$42,461	1.0	\$33,821	\$0
Other	\$9,687,318	\$5,199,424	44.4	\$3,595,625	\$366,753
Total**	\$257,004,675	\$149,158,759	1,321.5	\$98,712,682	\$8,849,294

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Indiana

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$59,193,829	\$28,939,840	328.8	\$21,459,477	\$1,212,410
Manufacturing	\$1,898,639	\$589,749	4.5	\$291,257	\$12,198
Transportation & Warehousing	\$4,541,204	\$2,398,075	44.7	\$1,965,236	\$52,279
Services**	\$34,857,248	\$20,091,936	225.8	\$12,579,353	\$1,326,869
-Food & accommodation	\$1,953,757	\$1,008,096	29.1	\$644,030	\$146,099
-Other	\$32,903,491	\$19,083,840	196.8	\$11,935,323	\$1,180,770
Agriculture	\$74,992	\$24,740	0.7	\$20,636	\$0
Other	\$4,422,272	\$2,285,543	19.7	\$1,418,090	\$104,631
Total**	\$104,988,184	\$54,329,883	624.2	\$37,734,048	\$2,708,388

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Iowa

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$30,018,747	\$15,323,643	159.8	\$11,538,452	\$617,322
Manufacturing	\$481,210	\$149,152	1.4	\$91,427	\$4,830
Transportation & Warehousing	\$1,811,982	\$950,277	17.8	\$786,886	\$27,143
Services**	\$15,353,866	\$8,655,196	99.8	\$5,057,784	\$610,043
-Food & accommodation	\$797,383	\$398,036	12.2	\$265,078	\$52,902
-Other	\$14,556,483	\$8,257,160	87.6	\$4,792,706	\$557,141
Agriculture	\$57,576	\$15,552	0.2	\$9,932	\$0
Other	\$2,080,907	\$1,040,323	9.6	\$654,456	\$65,560
Total**	\$49,804,288	\$26,134,143	288.6	\$18,138,937	\$1,324,898

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Kansas

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$26,450,295	\$13,829,664	136.9	\$9,843,996	\$511,966
Manufacturing	\$763,097	\$228,201	1.5	\$92,612	\$7,634
Transportation & Warehousing	\$1,918,414	\$1,056,081	18.1	\$859,270	\$31,175
Services**	\$15,230,195	\$8,699,222	91.3	\$5,267,779	\$547,915
-Food & accommodation	\$755,016	\$396,908	11.0	\$261,621	\$62,217
-Other	\$14,475,179	\$8,302,314	80.4	\$5,006,158	\$485,698
Agriculture	\$38,432	\$10,682	0.2	\$6,195	\$0
Other	\$1,806,307	\$854,623	8.2	\$561,969	\$26,567
Total**	\$46,206,741	\$24,678,473	256.2	\$16,631,822	\$1,125,258

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Kentucky

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$39,727,465	\$20,298,213	211.3	\$13,864,886	\$1,090,105
Manufacturing	\$953,672	\$285,647	2.3	\$144,773	\$21,073
Transportation & Warehousing	\$2,951,534	\$1,702,151	25.4	\$1,474,435	\$27,857
Services**	\$21,408,216	\$11,686,843	143.4	\$7,254,395	\$709,609
-Food & accommodation	\$1,206,122	\$628,746	17.4	\$436,802	\$75,666
-Other	\$20,202,094	\$11,058,097	125.9	\$6,817,593	\$633,943
Agriculture	\$41,048	\$19,423	0.9	\$13,118	\$0
Other	\$2,787,567	\$1,422,490	12.5	\$892,507	\$61,209
Total**	\$67,869,503	\$35,414,768	395.7	\$23,644,114	\$1,909,852

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Louisiana

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$47,538,867	\$23,311,897	262.8	\$17,015,011	\$1,284,808
Manufacturing	\$1,278,803	\$355,114	2.0	\$125,924	\$11,419
Transportation & Warehousing	\$3,413,142	\$1,874,698	31.6	\$1,346,107	\$46,073
Services**	\$26,469,425	\$14,468,965	181.5	\$8,486,081	\$1,123,842
-Food & accommodation	\$1,659,302	\$864,773	24.1	\$557,632	\$134,778
-Other	\$24,810,122	\$13,604,192	157.4	\$7,928,449	\$989,064
Agriculture	\$46,314	\$19,929	0.6	\$13,224	\$0
Other	\$3,089,826	\$1,619,884	13.3	\$968,104	\$78,208
Total**	\$81,836,377	\$41,650,487	491.7	\$27,954,451	\$2,544,350

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Maine

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$11,482,008	\$5,436,980	65.6	\$3,985,938	\$365,231
Manufacturing	\$148,792	\$42,480	0.5	\$28,735	\$2,218
Transportation & Warehousing	\$789,227	\$406,169	7.8	\$324,951	\$18,338
Services**	\$7,681,568	\$4,301,104	49.9	\$2,645,319	\$305,905
-Food & accommodation	\$405,975	\$236,049	5.4	\$149,900	\$35,469
-Other	\$7,275,593	\$4,065,055	44.6	\$2,495,419	\$270,436
Agriculture	\$18,413	\$10,465	0.4	\$6,029	\$355
Other	\$928,258	\$475,273	4.4	\$296,264	\$31,099
Total**	\$21,048,267	\$10,672,472	128.5	\$7,287,237	\$723,146

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Maryland

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$74,463,242	\$37,506,626	398.5	\$26,574,737	\$3,262,815
Manufacturing	\$950,991	\$344,839	2.7	\$190,289	\$13,800
Transportation & Warehousing	\$5,709,689	\$2,948,558	60.7	\$2,355,012	\$98,101
Services**	\$47,806,817	\$30,003,529	257.5	\$17,755,317	\$1,899,085
-Food & accommodation	\$2,323,012	\$1,348,067	29.4	\$858,687	\$215,186
-Other	\$45,483,805	\$28,655,462	228.1	\$16,896,630	\$1,683,899
Agriculture	\$38,820	\$18,374	0.5	\$11,583	\$0
Other	\$5,220,907	\$2,937,963	22.3	\$2,034,757	\$215,740
Total**	\$134,190,466	\$73,759,890	742.2	\$48,921,695	\$5,489,541

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Massachusetts

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$95,454,633	\$50,807,066	482.3	\$39,010,197	\$2,573,335
Manufacturing	\$1,827,584	\$667,183	5.6	\$450,352	\$23,520
Transportation & Warehousing	\$5,341,500	\$2,850,628	54.5	\$2,328,039	\$95,229
Services**	\$67,971,094	\$43,028,044	339.8	\$26,978,125	\$2,066,350
-Food & accommodation	\$3,023,799	\$1,860,692	36.7	\$1,257,884	\$214,994
-Other	\$64,947,295	\$41,167,352	303.0	\$25,720,241	\$1,851,357
Agriculture	\$38,609	\$24,298	0.8	\$17,188	\$1,743
Other	\$5,349,008	\$3,002,214	26.8	\$2,268,182	\$0
Total**	\$175,982,428	\$100,379,434	909.7	\$71,052,083	\$4,760,178

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Michigan

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$80,808,437	\$42,374,431	420.3	\$30,900,735	\$1,880,771
Manufacturing	\$2,568,793	\$754,898	6.6	\$475,996	\$21,713
Transportation & Warehousing	\$5,660,565	\$2,982,568	52.7	\$2,344,429	\$101,266
Services**	\$56,098,373	\$32,139,739	351.5	\$20,370,954	\$1,753,323
-Food & accommodation	\$2,745,930	\$1,398,859	41.2	\$971,172	\$124,669
-Other	\$53,352,442	\$30,740,879	310.2	\$19,399,783	\$1,628,654
Agriculture	\$152,078	\$70,125	1.9	\$39,712	\$0
Other	\$6,247,950	\$3,071,166	28.3	\$2,122,046	\$165,562
Total**	\$151,536,197	\$81,392,926	861.2	\$56,253,873	\$3,922,635

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Minnesota

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$57,826,568	\$33,177,965	270.2	\$24,397,853	\$1,446,615
Manufacturing	\$2,489,534	\$805,947	5.8	\$434,689	\$21,261
Transportation & Warehousing	\$3,603,828	\$1,940,446	34.1	\$1,509,705	\$86,791
Services**	\$38,966,237	\$23,424,922	226.5	\$14,709,916	\$1,575,752
-Food & accommodation	\$1,887,104	\$1,021,556	26.5	\$672,082	\$162,910
-Other	\$37,079,133	\$22,403,366	200.1	\$14,037,834	\$1,412,842
Agriculture	\$149,244	\$41,364	0.9	\$24,212	\$0
Other	\$4,887,611	\$2,261,443	22.4	\$1,607,429	\$120,161
Total**	\$107,923,022	\$61,652,087	559.9	\$42,683,804	\$3,250,579

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Mississippi

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$27,122,598	\$12,690,884	156.1	\$9,270,918	\$792,651
Manufacturing	\$701,090	\$160,718	1.1	\$65,042	\$6,345
Transportation & Warehousing	\$2,025,012	\$1,042,206	19.9	\$830,213	\$31,428
Services**	\$13,185,199	\$6,855,481	97.1	\$3,871,140	\$632,644
-Food & accommodation	\$762,988	\$375,452	11.7	\$231,732	\$61,470
-Other	\$12,422,211	\$6,480,028	85.3	\$3,639,408	\$571,174
Agriculture	\$45,535	\$16,573	0.5	\$14,473	\$0
Other	\$1,915,204	\$915,408	8.7	\$579,849	\$54,512
Total**	\$44,994,638	\$21,681,269	283.4	\$14,631,636	\$1,517,580

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Missouri

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$50,329,577	\$26,025,579	265.6	\$18,877,120	\$1,089,813
Manufacturing	\$1,077,455	\$352,614	3.0	\$196,534	\$16,250
Transportation & Warehousing	\$3,534,159	\$1,851,113	33.7	\$1,388,123	\$77,691
Services**	\$34,546,934	\$19,600,704	210.7	\$12,225,167	\$1,145,744
-Food & accommodation	\$1,794,185	\$921,904	26.5	\$621,245	\$102,953
-Other	\$32,752,749	\$18,678,799	184.2	\$11,603,922	\$1,042,791
Agriculture	\$57,307	\$18,870	0.8	\$7,077	\$0
Other	\$3,770,086	\$1,915,216	17.6	\$1,274,016	\$85,609
Total**	\$93,315,518	\$49,764,096	531.4	\$33,968,036	\$2,415,107

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Montana

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$17,368,692	\$8,224,697	99.0	\$6,224,598	\$227,248
Manufacturing	\$401,736	\$79,570	0.5	\$32,802	\$3,641
Transportation & Warehousing	\$1,067,664	\$547,478	10.3	\$405,291	\$20,634
Services**	\$8,928,216	\$4,625,481	63.9	\$2,854,491	\$251,593
-Food & accommodation	\$536,161	\$269,214	8.4	\$197,655	\$8,949
-Other	\$8,392,055	\$4,356,267	55.5	\$2,656,836	\$242,643
Agriculture	\$23,618	\$13,100	0.3	\$6,754	\$217
Other	\$1,260,987	\$571,869	6.1	\$416,912	\$23,100
Total**	\$29,050,913	\$14,062,194	180.1	\$9,940,848	\$526,434

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Nebraska

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$20,707,618	\$11,145,718	104.0	\$7,854,368	\$407,317
Manufacturing	\$265,727	\$78,155	0.9	\$52,054	\$3,092
Transportation & Warehousing	\$1,262,808	\$679,538	11.8	\$494,628	\$22,554
Services**	\$12,451,769	\$7,026,457	75.8	\$4,219,233	\$421,678
-Food & accommodation	\$591,180	\$307,116	8.8	\$199,137	\$45,439
-Other	\$11,860,590	\$6,719,341	67.0	\$4,020,096	\$376,239
Agriculture	\$42,995	\$12,431	0.2	\$6,976	\$0
Other	\$1,370,432	\$827,459	6.8	\$531,154	\$0
Total**	\$36,101,348	\$19,769,758	199.6	\$13,158,412	\$854,641

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Nevada

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$57,377,032	\$28,025,432	316.2	\$20,614,726	\$2,379,944
Manufacturing	\$519,246	\$154,905	1.6	\$98,119	\$6,403
Transportation & Warehousing	\$5,199,586	\$2,706,997	53.9	\$2,083,744	\$144,195
Services**	\$37,408,665	\$21,766,255	215.8	\$12,104,544	\$1,863,107
-Food & accommodation	\$1,647,988	\$1,056,590	17.8	\$506,294	\$261,407
-Other	\$35,760,677	\$20,709,665	198.0	\$11,598,250	\$1,601,700
Agriculture	\$12,889	\$7,126	0.1	\$2,739	\$115
Other	\$3,405,507	\$1,860,720	14.3	\$1,149,642	\$110,149
Total**	\$103,922,925	\$54,521,435	601.9	\$36,053,514	\$4,503,912

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

New Hampshire

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$14,711,595	\$7,698,063	76.7	\$5,645,835	\$256,504
Manufacturing	\$144,770	\$50,105	0.5	\$30,527	\$2,727
Transportation & Warehousing	\$801,364	\$444,917	7.8	\$294,597	\$16,547
Services**	\$9,249,728	\$5,632,614	52.4	\$3,367,242	\$384,766
-Food & accommodation	\$455,566	\$264,694	5.9	\$181,287	\$18,027
-Other	\$8,794,161	\$5,367,920	46.5	\$3,185,954	\$366,739
Agriculture	\$7,023	\$4,369	0.2	\$2,378	\$461
Other	\$888,640	\$479,257	4.4	\$327,532	\$38,174
Total**	\$25,803,119	\$14,309,325	142.0	\$9,668,110	\$699,180

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

New Jersey

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$101,679,563	\$57,627,577	477.6	\$42,855,680	\$4,547,998
Manufacturing	\$2,407,828	\$806,278	4.8	\$418,141	\$43,434
Transportation & Warehousing	\$7,935,587	\$4,611,809	69.9	\$3,606,497	\$169,807
Services**	\$69,771,267	\$43,625,598	367.2	\$27,452,463	\$3,134,414
-Food & accommodation	\$2,736,611	\$1,560,975	37.0	\$1,097,953	\$100,938
-Other	\$67,034,656	\$42,064,623	330.2	\$26,354,510	\$3,033,476
Agriculture	\$46,499	\$28,607	0.7	\$16,042	\$1,769
Other	\$5,945,334	\$3,459,984	29.5	\$2,426,921	\$242,783
Total**	\$187,786,077	\$110,159,854	949.6	\$76,775,743	\$8,140,205

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

New Mexico

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$31,433,201	\$13,582,820	191.0	\$10,432,261	\$702,892
Manufacturing	\$590,839	\$120,250	0.9	\$38,781	\$3,827
Transportation & Warehousing	\$1,827,992	\$972,582	17.7	\$703,532	\$35,727
Services**	\$14,692,599	\$8,055,480	98.7	\$4,369,475	\$659,155
-Food & accommodation	\$968,408	\$522,375	13.5	\$345,694	\$56,487
-Other	\$13,724,191	\$7,533,104	85.2	\$4,023,782	\$602,667
Agriculture	\$27,343	\$16,000	0.4	\$10,413	\$0
Other	\$2,826,066	\$1,412,377	11.9	\$842,512	\$107,837
Total**	\$51,398,040	\$24,159,508	320.6	\$16,396,973	\$1,509,437

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

New York

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$275,205,072	\$145,683,457	1,386.2	\$107,696,188	\$10,283,675
Manufacturing	\$4,374,112	\$1,595,075	12.4	\$922,234	\$215,178
Transportation & Warehousing	\$16,039,272	\$8,743,522	151.9	\$6,542,476	\$358,888
Services**	\$183,016,667	\$123,092,395	870.8	\$73,422,544	\$7,429,197
-Food & accommodation	\$8,346,760	\$5,319,441	94.7	\$3,394,788	\$779,906
-Other	\$174,669,907	\$117,772,954	776.1	\$70,027,756	\$6,649,291
Agriculture	\$182,278	\$106,183	2.4	\$54,888	\$3,908
Other	\$18,119,419	\$10,109,573	79.3	\$7,364,684	\$241,852
Total**	\$496,936,820	\$289,330,204	2,503.0	\$196,003,014	\$18,532,698

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

North Carolina

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$113,650,651	\$55,971,918	630.7	\$41,272,870	\$3,180,477
Manufacturing	\$3,550,044	\$1,172,330	10.1	\$617,319	\$79,226
Transportation & Warehousing	\$8,627,466	\$4,407,380	85.5	\$3,513,435	\$175,349
Services**	\$76,924,349	\$44,376,901	466.8	\$26,027,346	\$2,646,405
-Food & accommodation	\$4,172,623	\$2,230,042	59.0	\$1,523,741	\$177,057
-Other	\$72,751,726	\$42,146,859	407.7	\$24,503,604	\$2,469,348
Agriculture	\$258,826	\$86,620	1.8	\$69,589	\$0
Other	\$7,797,904	\$4,204,599	32.0	\$2,524,871	\$254,704
Total**	\$210,809,240	\$110,219,748	1,226.9	\$74,025,429	\$6,336,161

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

North Dakota

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$8,616,979	\$4,435,042	45.1	\$3,522,006	\$124,541
Manufacturing	\$177,697	\$22,614	0.2	\$12,829	\$417
Transportation & Warehousing	\$468,888	\$248,598	4.4	\$202,499	\$5,163
Services**	\$3,833,527	\$2,115,346	24.2	\$1,328,268	\$117,999
-Food & accommodation	\$213,873	\$109,250	3.3	\$72,587	\$12,854
-Other	\$3,619,655	\$2,006,096	21.0	\$1,255,681	\$105,145
Agriculture	\$9,589	\$3,836	0.1	\$2,303	\$0
Other	\$739,968	\$313,421	2.8	\$206,106	\$0
Total**	\$13,846,648	\$7,138,858	76.7	\$5,274,012	\$248,119

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Ohio

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$105,818,990	\$54,973,206	553.4	\$39,947,500	\$3,161,044
Manufacturing	\$4,340,946	\$1,369,813	9.7	\$684,784	\$61,230
Transportation & Warehousing	\$8,506,809	\$4,598,766	80.2	\$3,835,015	\$140,981
Services**	\$75,070,476	\$44,225,307	456.4	\$26,281,228	\$2,685,036
-Food & accommodation	\$3,762,779	\$1,968,377	54.9	\$1,326,206	\$230,360
-Other	\$71,307,697	\$42,256,930	401.5	\$24,955,022	\$2,454,676
Agriculture	\$136,947	\$49,116	2.0	\$38,647	\$0
Other	\$8,283,196	\$4,385,069	37.8	\$2,694,605	\$283,492
Total**	\$202,157,364	\$109,601,276	1,139.4	\$73,481,778	\$6,331,784

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Oklahoma

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$38,476,879	\$18,543,997	216.1	\$13,901,223	\$763,650
Manufacturing	\$1,013,502	\$216,678	1.7	\$126,281	\$7,742
Transportation & Warehousing	\$2,826,031	\$1,481,916	27.5	\$1,172,112	\$34,065
Services**	\$21,715,514	\$11,578,895	147.1	\$7,123,700	\$734,142
-Food & accommodation	\$1,237,644	\$638,800	18.2	\$438,968	\$63,345
-Other	\$20,477,869	\$10,940,095	128.9	\$6,684,732	\$670,797
Agriculture	\$41,075	\$17,622	0.6	\$7,524	\$0
Other	\$3,975,047	\$1,813,905	14.6	\$1,080,785	\$77,545
Total**	\$68,048,048	\$33,653,013	407.6	\$23,411,625	\$1,617,143

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Oregon

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$79,407,158	\$39,907,761	430.6	\$30,332,024	\$1,636,443
Manufacturing	\$1,861,956	\$543,911	6.2	\$368,112	\$27,574
Transportation & Warehousing	\$5,899,597	\$3,112,694	58.1	\$2,431,361	\$176,486
Services**	\$54,546,081	\$32,580,270	322.4	\$19,998,836	\$1,522,019
-Food & accommodation	\$2,989,355	\$1,692,176	40.0	\$1,211,435	\$68,032
-Other	\$51,556,727	\$30,888,094	282.4	\$18,787,401	\$1,453,987
Agriculture	\$180,770	\$101,119	2.1	\$54,371	\$3,415
Other	\$6,012,389	\$3,103,053	27.9	\$2,089,276	\$101,942
Total**	\$147,907,952	\$79,348,808	847.4	\$55,273,981	\$3,467,878

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Pennsylvania

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$125,989,899	\$64,437,374	670.6	\$45,958,093	\$4,472,799
Manufacturing	\$4,308,909	\$1,363,911	9.7	\$695,645	\$40,283
Transportation & Warehousing	\$9,807,975	\$5,332,241	96.3	\$4,468,765	\$132,453
Services**	\$90,005,709	\$55,033,516	514.2	\$35,781,426	\$3,332,977
-Food & accommodation	\$4,105,444	\$2,249,964	58.0	\$1,530,190	\$259,401
-Other	\$85,900,265	\$52,783,552	456.1	\$34,251,236	\$3,073,577
Agriculture	\$166,431	\$70,562	1.9	\$41,559	\$4,062
Other	\$10,208,872	\$5,386,644	45.5	\$3,511,015	\$347,796
Total**	\$240,487,796	\$131,624,248	1,338.4	\$90,456,503	\$8,330,370

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Rhode Island

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$9,805,025	\$5,460,718	47.2	\$3,976,557	\$378,171
Manufacturing	\$80,649	\$25,006	0.3	\$17,710	\$1,124
Transportation & Warehousing	\$521,959	\$264,595	5.5	\$210,806	\$9,899
Services**	\$6,420,065	\$3,776,951	38.7	\$2,250,329	\$273,784
-Food & accommodation	\$343,420	\$199,163	4.6	\$127,370	\$30,897
-Other	\$6,076,646	\$3,577,789	34.2	\$2,122,959	\$242,888
Agriculture	\$2,367	\$1,800	0.1	\$1,657	\$177
Other	\$624,701	\$346,821	2.8	\$207,925	\$24,090
Total**	\$17,454,766	\$9,875,891	94.7	\$6,664,984	\$687,245

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

South Carolina

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$59,200,084	\$30,435,576	315.6	\$20,979,997	\$2,363,776
Manufacturing	\$1,123,430	\$346,627	3.2	\$208,261	\$19,162
Transportation & Warehousing	\$4,399,309	\$2,266,325	43.9	\$1,795,122	\$64,289
Services**	\$33,819,013	\$18,373,772	229.1	\$11,145,311	\$1,271,471
-Food & accommodation	\$2,094,501	\$1,086,573	30.5	\$706,662	\$132,611
-Other	\$31,724,512	\$17,287,200	198.6	\$10,438,649	\$1,138,860
Agriculture	\$62,331	\$24,594	0.9	\$9,928	\$0
Other	\$3,769,819	\$2,027,243	17.6	\$1,249,802	\$98,655
Total**	\$102,373,986	\$53,474,136	610.3	\$35,388,422	\$3,817,353

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

South Dakota

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$8,391,633	\$4,182,879	45.3	\$3,179,610	\$150,626
Manufacturing	\$93,687	\$30,143	0.4	\$22,569	\$953
Transportation & Warehousing	\$414,503	\$202,012	4.3	\$163,952	\$8,132
Services**	\$4,452,419	\$2,549,159	27.5	\$1,482,630	\$174,629
-Food & accommodation	\$230,692	\$115,657	3.5	\$74,113	\$17,330
-Other	\$4,221,727	\$2,433,503	23.9	\$1,408,518	\$157,299
Agriculture	\$12,324	\$4,294	0.1	\$2,769	\$0
Other	\$602,034	\$265,846	3.0	\$189,254	\$0
Total**	\$13,966,601	\$7,234,332	80.5	\$5,040,785	\$334,340

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Tennessee

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$72,292,743	\$38,200,254	372.2	\$27,454,824	\$2,487,663
Manufacturing	\$1,968,473	\$617,792	4.6	\$308,484	\$23,402
Transportation & Warehousing	\$5,700,539	\$3,271,899	48.8	\$2,697,709	\$99,929
Services**	\$47,820,779	\$27,731,512	290.4	\$17,848,655	\$1,913,621
-Food & accommodation	\$2,696,492	\$1,486,677	36.3	\$971,458	\$199,286
-Other	\$45,124,287	\$26,244,834	254.1	\$16,877,197	\$1,714,335
Agriculture	\$77,147	\$23,468	1.9	\$2,882	\$0
Other	\$4,831,312	\$2,409,052	22.6	\$1,663,319	\$52,969
Total**	\$132,690,992	\$72,253,977	740.5	\$49,975,874	\$4,577,584

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Texas

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$378,912,657	\$197,087,215	1,973.7	\$135,699,862	\$6,762,742
Manufacturing	\$19,136,937	\$5,377,987	38.6	\$2,777,854	\$142,261
Transportation & Warehousing	\$32,082,657	\$16,163,640	314.7	\$13,150,693	\$532,672
Services**	\$252,256,615	\$144,662,343	1,544.2	\$90,999,777	\$8,903,468
-Food & accommodation	\$13,733,613	\$7,342,608	193.9	\$5,261,759	\$626,727
-Other	\$238,523,002	\$137,319,735	1,350.2	\$85,738,018	\$8,276,741
Agriculture	\$767,581	\$295,646	10.7	\$121,589	\$0
Other	\$31,700,460	\$16,688,469	117.1	\$9,924,225	\$1,056,433
Total**	\$714,856,908	\$380,275,300	3,998.9	\$252,674,000	\$17,397,576

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Utah

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$66,367,588	\$33,466,070	358.1	\$25,527,259	\$1,916,791
Manufacturing	\$2,970,182	\$751,829	6.2	\$387,716	\$22,028
Transportation & Warehousing	\$5,348,030	\$2,949,437	48.3	\$2,393,598	\$129,332
Services**	\$46,306,469	\$25,331,866	285.1	\$14,301,972	\$1,344,194
-Food & accommodation	\$2,002,791	\$1,032,662	29.3	\$671,784	\$130,153
-Other	\$44,303,678	\$24,299,204	255.8	\$13,630,188	\$1,214,041
Agriculture	\$92,419	\$49,183	1.0	\$19,753	\$0
Other	\$4,622,967	\$2,474,175	19.5	\$1,524,029	\$133,008
Total**	\$125,707,654	\$65,022,560	718.1	\$44,154,328	\$3,545,353

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Vermont

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$5,338,321	\$2,575,781	29.6	\$1,901,583	\$137,696
Manufacturing	\$54,730	\$14,785	0.2	\$10,952	\$727
Transportation & Warehousing	\$283,110	\$145,335	2.9	\$122,176	\$5,693
Services**	\$2,872,319	\$1,614,132	18.7	\$955,665	\$136,487
-Food & accommodation	\$155,040	\$90,826	2.0	\$58,320	\$11,804
-Other	\$2,717,279	\$1,523,307	16.6	\$897,344	\$124,683
Agriculture	\$6,789	\$3,961	0.1	\$2,143	\$115
Other	\$339,502	\$166,702	1.8	\$125,679	\$11,181
Total**	\$8,894,770	\$4,520,697	53.3	\$3,118,198	\$291,898

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Virginia

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$100,311,047	\$51,925,157	524.8	\$34,945,912	\$3,221,119
Manufacturing	\$1,685,544	\$582,596	5.1	\$301,719	\$42,515
Transportation & Warehousing	\$7,548,026	\$3,955,208	75.1	\$3,026,076	\$137,575
Services**	\$65,175,841	\$39,156,141	359.1	\$22,959,235	\$2,270,983
-Food & accommodation	\$3,067,438	\$1,671,821	41.9	\$1,094,544	\$191,971
-Other	\$62,108,404	\$37,484,320	317.2	\$21,864,691	\$2,079,011
Agriculture	\$88,420	\$40,453	1.5	\$16,820	\$1,485
Other	\$7,719,267	\$4,366,818	32.8	\$2,714,083	\$266,685
Total**	\$182,528,145	\$100,026,373	998.3	\$63,963,846	\$5,940,362

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Washington

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$197,556,264	\$105,377,830	992.6	\$73,738,555	\$9,207,562
Manufacturing	\$6,960,527	\$1,993,165	13.4	\$955,955	\$74,773
Transportation & Warehousing	\$13,277,844	\$7,323,192	122.9	\$5,758,355	\$319,722
Services**	\$122,335,438	\$75,984,602	610.0	\$43,529,914	\$6,112,151
-Food & accommodation	\$6,070,127	\$3,779,654	70.3	\$2,283,206	\$665,552
-Other	\$116,265,311	\$72,204,948	539.8	\$41,246,708	\$5,446,599
Agriculture	\$429,106	\$249,729	3.8	\$188,056	\$2,873
Other	\$14,119,498	\$7,760,294	63.2	\$5,259,557	\$475,681
Total**	\$354,678,678	\$198,688,812	1,806.0	\$129,430,391	\$16,192,762

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

West Virginia

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$14,610,313	\$7,036,234	81.9	\$4,992,671	\$418,614
Manufacturing	\$129,788	\$32,015	0.3	\$15,279	\$1,109
Transportation & Warehousing	\$854,974	\$434,866	8.5	\$354,731	\$16,172
Services**	\$6,983,145	\$3,845,662	47.4	\$2,405,100	\$260,797
-Food & accommodation	\$406,682	\$208,120	6.0	\$134,024	\$32,203
-Other	\$6,576,463	\$3,637,541	41.4	\$2,271,075	\$228,594
Agriculture	\$7,567	\$2,959	0.4	\$157	\$253
Other	\$952,135	\$494,621	4.7	\$316,001	\$22,098
Total**	\$23,537,922	\$11,846,356	143.2	\$8,083,938	\$719,042

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding

Wisconsin

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$51,912,648	\$25,864,639	283.3	\$19,425,887	\$1,298,062
Manufacturing	\$1,763,844	\$605,209	5.6	\$388,248	\$13,211
Transportation & Warehousing	\$3,313,542	\$1,756,915	32.9	\$1,407,900	\$95,916
Services**	\$33,845,010	\$19,579,695	208.7	\$11,904,552	\$1,326,629
-Food & accommodation	\$1,692,704	\$865,354	25.8	\$570,556	\$101,979
-Other	\$32,152,306	\$18,714,340	182.8	\$11,333,996	\$1,224,650
Agriculture	\$104,686	\$49,505	1.2	\$24,151	\$0
Other	\$3,848,953	\$2,009,881	18.7	\$1,342,014	\$99,137
Total**	\$94,788,683	\$49,865,844	550.3	\$34,492,752	\$2,832,955

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding



Wyoming

Industry	Output	Value-added	Employment (no. of jobs)	Labor Income	Taxes*
Wholesale/Retail	\$11,815,060	\$5,212,641	70.1	\$4,216,485	\$201,669
Manufacturing	\$187,460	\$22,706	0.1	\$9,201	\$1,177
Transportation & Warehousing	\$819,328	\$470,136	6.9	\$325,216	\$12,750
Services**	\$4,542,889	\$2,298,567	31.4	\$1,269,546	\$162,457
-Food & accommodation	\$263,787	\$135,328	4.0	\$89,164	\$13,947
-Other	\$4,279,101	\$2,163,239	27.4	\$1,180,381	\$148,510
Agriculture	\$3,652	\$2,347	0.1	\$1,460	\$90
Other	\$808,619	\$404,138	3.2	\$255,630	\$27,720
Total**	\$18,177,007	\$8,410,536	111.8	\$6,077,538	\$405,863

\*Indirect Business Taxes

\*\*Services (Total) and Total may not add due to rounding