

2009

U.S.  
INDUSTRY  
MARKET



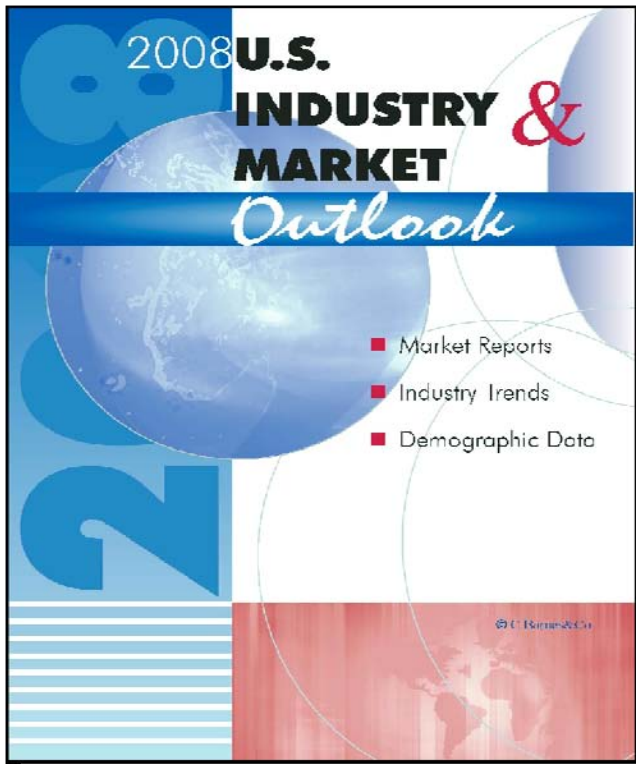
Outlook

- Market Reports
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# 2008 U.S. INDUSTRY & MARKET OUTLOOK

## NATIONAL EDITION



The **2008 U.S. Industry & Market Outlook** report is the leading annual publication that describes over 100 major U.S. industries and 500+ minor industries. Published each year in October, the Outlook report provides the most current and accurate estimates of the size of the largest manufacturing, retail, wholesale and services industries in the United States.

With over 250 pages, the National edition of the 2008 U.S. Industry & Market Outlook features:

- 2008 establishments, employment and sales totals for each industry
- 2009 forecast establishments, employment and sales totals
- 5-year trend establishments and sales totals
- Industry financial ratios such as sales per employees, sales per establishment and employees per establishment
- 2007 establishments and sales totals for 500+ minor industries
- Industry definitions and descriptions

The 2008 U.S. Industry & Market Outlook report is available in a National/U.S. States edition (400+ pgs.).

The Outlook report is available for purchase in either PDF, spreadsheet (Excel) or print format edition.

The 2008 U.S. Industry & Market Outlook report is an essential reference tool for industry researchers, market analysts, CEOs and leading industry executives.

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# 2008 U.S. INDUSTRY & MARKET OUTLOOK (NATIONAL EDITION)

## TABLE OF CONTENTS

<u>INDUSTRY</u>	<u>PAGE NUMBER</u>
<b><u>Construction</u></b>	
Single-Family Housing Construction Industry	7
Plumbing & Heating & A/C Contractors	9
Electrical Contractors Industry	11
Carpentry Contractors Industry	13
<b><u>Manufacturing</u></b>	
Breakfast Cereal Manufacturing Industry	15
Frozen Food Manufacturing Industry	17
Cookie Cracker & Pasta Mfg. Industry	19
Snack Food Manufacturing Industry	21
Soft-Drink Manufacturing Industry	23
Breweries & Beer-Making Industry	25
Wineries & Wine-Making Industry	27
Distilleries & Alcohol-Making Industry	29
Men's & Boys' Apparel Mfg. Industry	31
Women's & Girls' Apparel Mfg. Industry	33
Paper Mills Industry	35
Printing Industry	37
Petroleum Refineries Industry	39
Petrochemical Manufacturing Industry	41
Pharmaceutical Preparation Mfg. Industry	43
Electronic Computer Manufacturing Industry	45
Telephone Equipment Mfg. Industry	47
Radio/TV Broadcast Equipment Industry	49
Audio & Visual Equipment Mfg. Industry	51
Semi-Conductor & Electronic Components Mfg.	53
Software Reproducing Industry	55
Major Appliance Manufacturing Industry	57
Automobile & Motor Vehicle Mfg. Industry	59
Automobile Gas Engine & Engine Parts Mfg.	61
Aircraft Manufacturing Industry	63
Kitchen Cabinet & Countertop Mfg. Industry	65
Household & Institutional Furniture Mfg.	67
Office Furniture Manufacturing Industry	69
Medical Equipment & Supplies Mfg. Industry	71
Sign Manufacturing	73

# TABLE OF CONTENTS

<u>INDUSTRY</u>	<u>PAGE NUMBER</u>
 <b><u>Wholesales</u></b>	
Automobile & Other Vehicles Wholesale	75
Motor Vehicle Parts & Supplies Wholesales	77
Furniture Wholesale Industry	79
Home Furnishings Wholesale Industry	81
Office Equipment Wholesales Industry	83
Computer & Equipment Wholesale Industry	85
Hardware Wholesale Industry	87
Printing & Writing Paper Wholesales	89
Men's & Boys' Clothing Wholesales Industry	91
Women's & Children's Clothing Wholesale	93
General-Line Grocery Wholesale Industry	95
Beer & Ale Wholesale Industry	97
Wine & Alcoholic Beverages Wholesales	99
Book/Periodical/Newspaper Wholesales	101
 <b><u>Retail</u></b>	
New Car Dealers Industry	103
Furniture Stores Industry	105
Appliance/TV/Electronics Stores Industry	107
Computer & Software Stores Industry	109
Home Centers Industry	111
Hardware Stores Industry	113
Grocery Stores Industry	115
Beer & Wine & Liquor Stores Industry	117
Pharmacies & Drug Stores Industry	119
Gas Stations with Convenience Stores	121
Men's Clothing Stores Industry	123
Women's Clothing Stores Industry	125
Family Clothing Stores Industry	127
Book Stores Retailing Industry	129
Record & CD & Tape Stores Industry	131
Department Stores Industry	133
Warehouse Clubs & Superstores Industry	135
Office Supplies & Stationery Stores Industry	137
Electronic Shopping & Mail Order Houses	139

# TABLE OF CONTENTS

<u>INDUSTRY</u>	<u>PAGE NUMBER</u>
 <b><u>Transportation &amp; Warehouse</u></b>	
Scheduled Air Transportation Industry	141
Local Freight Trucking Industry	143
Freight Trucking Long Distance Industry	145
General Warehousing & Storage Industry	147
 <b><u>Information</u></b>	
Newspaper Publishing Industry	149
Periodical Publishing Industry	151
Book Publishing Industry	153
Database & Directory Publishing Industry	155
Software Publishing Industry	157
Motion Pictures & Video Production Industry	159
Music Publishing Industry	161
Radio Broadcasting Industry	163
Television Broadcasting Services Industry	165
Cable Television Networks Industry	167
Wired Telecommunications Carriers Industry	169
Wireless Telecommunications Carriers	171
Data Processing Services Industry	173
 <b><u>Finance &amp; Insurance</u></b>	
Commercial Banking Industry	175
Mortgage & Non-Mortgage Loan Brokers	177
Investment Banking & Securities Dealing	179
Securities Brokerage Industry	181
Life Insurance Carriers Industry	183
Health & Medical Insurance Carriers	185
Property & Casualty Insurance Carriers	187
Insurance Agencies & Brokerages Industry	189
 <b><u>Real Estate</u></b>	
Offices of Real Estate Agents & Brokers	191
Real Estate Property Managers Industry	193
 <b><u>Professional Services</u></b>	
Offices of Lawyers Industry	195
Offices of Certified Public Accountants	197
Architectural Services Industry	199
Engineering Services Industry	201
Interior Design Services Industry	203
Graphic Designs Services Industry	205
Computer Systems Designs Services Industry	207

## TABLE OF CONTENTS

<u>INDUSTRY</u>	<u>PAGE NUMBER</u>
<b><u>Professional Services</u></b>	
Management Consulting Services Industry	209
Advertising Agencies Industry	211
Public Relations Agencies Industry	213
Direct Mail Advertising Industry	215
Marketing Research & Public Opinion Polling	217
Telemarketing Services Industry	219
Security Guards & Patrol Services Industry	221
<b><u>Educational Services</u></b>	
Colleges & Universities Industry	223
Exam Preparation & Tutoring Industry	225
Educational Support Services Industry	227
<b><u>Health Care Services</u></b>	
Offices of Physicians Industry	229
Offices of Dentists Industry	231
Medical Laboratories Industry	233
Home Health Care Services Industry	235
Medical & Surgical Hospitals Industry	237
Nursing Care Facilities Industry	239
Community Care Facilities for the Elderly	241
<b><u>Arts &amp; Recreation</u></b>	
Musical Groups & artists Industry	243
Spectator Sports Industry	245
Golf Courses & Country Clubs Industry	247
Fitness & Recreational Sports Centers	249
<b><u>Accomodation &amp; Food</u></b>	
Hotels & Motels Industry	251
Full-Service Restaurants Industry	253
Fast Food Restaurants Industry	255
Drinking Places & Bars Industry	257
<b>Appendix: Definitions &amp; Terms</b>	<b>259</b>

# SINGLE-FAMILY HOUSING CONSTRUCTION INDUSTRY (NAICS 236115)

## INDUSTRY DEFINITION

NAICS 236115: Single-Family Housing Construction. This industry comprises establishments primarily responsible for the entire construction (i.e., new work, additions, alterations, and repairs) of single family residential housing units (e.g., single family detached houses, town houses, or row houses where each housing unit is separated by a ground-to-roof wall and where no housing units are constructed above or below). This industry includes establishments responsible for additions and alterations to mobile homes and on-site assembly of modular and prefabricated houses. Establishments identified as single family construction management firms are also included in this industry. Establishments in this industry may perform work for others or on their own account for sale as speculative or operative builders. Kinds of establishments include single family housing custom builders, general contractors, design builders, engineer-constructors, joint-venture contractors, and turnkey contractors.

## INDUSTRY ESTABLISHMENTS, SALES & EMPLOYMENT TRENDS

	Year					Percent Change Year-to-Year			
	2005	2006	2007	2008	2009	05-06	06-07	07-08	08-09
<b>Establishments</b>	112,491	104,586	96,681	90,636	84,969	-7.0%	-7.6%	-6.3%	-6.3%
<b>Sales (\$Millions)</b>	139,043	129,441	128,736	128,633	128,050	-6.9%	-0.5%	-0.1%	-0.5%
<b>Employment</b>	627,262	560,794	518,320	485,945	455,657	-10.6%	-7.6%	-6.2%	-6.2%

## INDUSTRY RATIOS

(Industry Averages)	Year					Percent Change Year-to-Year			
	2005	2006	2007	2008	2009	05-06	06-07	07-08	08-09
<b>Sales (\$M)/Estab.</b>	1.24	1.24	1.33	1.42	1.51	0.1%	7.6%	6.6%	6.2%
<b>Sales (\$) per Emp.</b>	221,667	230,816	248,372	264,708	281,022	4.1%	7.6%	6.6%	6.2%
<b>Emps. per Estab.</b>	5.6	5.4	5.4	5.4	5.4	-3.8%	0.0%	0.0%	0.0%

# SINGLE-FAMILY HOUSING CONSTRUCTION INDUSTRY (NAICS 236115)

## SIZE OF FIRM INDUSTRY ESTIMATES

Year	Establishments by Size of Firm									Total
	1-4 Emps.	5-9 Emps.	10-19 Emps.	20-49 Emps.	50-99 Emps.	100-249 Emps.	250-499 Emps.	500+ Emps.	Unknown Emps.	
2006	73,973	14,641	5,388	1,713	300	122	12	8	522	96,681
2008	69,348	13,726	5,051	1,606	282	114	11	7	490	90,636
2009	65,012	12,867	4,735	1,506	264	107	10	7	459	84,969
	Sales (\$Millions) by Size of Firm									Total
2006	42,699	20,283	21,771	17,008	7,838	9,764	2,320	3,452	3,602	128,736
2008	42,664	20,266	21,753	16,993	7,832	9,756	2,318	3,449	3,603	128,633
2009	42,466	20,172	21,652	16,915	7,795	9,711	2,307	3,434	3,598	128,050
	Employment by Size of Firm									Total
2006	221,919	87,846	75,433	54,817	18,325	16,162	3,603	6,935	33,280	518,320
2008	208,043	82,353	70,716	51,390	17,180	15,151	3,378	6,501	31,232	485,945
2009	195,035	77,204	66,295	48,177	16,105	14,204	3,167	6,095	29,376	455,657

## SUB-INDUSTRIES – 2007 INDUSTRY ESTIMATES

Sub-Industries	Total Establishments	Total Employment	Total Sales (\$M)
Single-family housing construction	45,727	227,819	45,738
Single-family home remodeling,	6,147	29,897	4,924
General remodeling, single-family	20,291	93,082	15,129
Mobile home repair, on site	321	1,537	206
Patio and deck construction and repair	891	4,412	571
Repairing fire damage, single-family	337	6,662	979
New construction, single-family houses	22,754	151,929	60,466
Prefabricated single-family house	129	1,886	260
Townhouse construction	85	1,097	462

# PLUMBING & HEATING & A/C CONTRACTORS (NAICS 23822)

## INDUSTRY DEFINITION

NAICS 23822: Plumbing & Heating & A/C Contractors. This industry comprises establishments primarily engaged in one or more of the following: (1) installing plumbing, heating, and air-conditioning equipment; (2) servicing plumbing, heating, and air-conditioning equipment; and (3) the combined activity of selling and installing plumbing, heating, and air-conditioning equipment. The plumbing, heating, and air-conditioning work performed includes new work, additions, alterations, and maintenance and repairs. The activities performed by these establishments range from duct fabrication and installation at the site to installation of refrigeration equipment, installation of sprinkler systems, and installation of environmental controls.

## INDUSTRY ESTABLISHMENTS, SALES & EMPLOYMENT TRENDS

	Year					Percent Change Year-to-Year			
	2005	2006	2007	2008	2009	05-06	06-07	07-08	08-09
<b>Establishments</b>	95,943	96,144	96,345	97,296	98,257	0.2%	0.2%	1.0%	1.0%
<b>Sales (\$Millions)</b>	106,997	116,999	124,268	131,978	139,830	9.3%	6.2%	6.2%	5.9%
<b>Employment</b>	970,946	998,759	1,000,911	1,010,809	1,020,802	2.9%	0.2%	1.0%	1.0%

## INDUSTRY RATIOS

(Industry Averages)	Year					Percent Change Year-to-Year			
	2005	2006	2007	2008	2009	05-06	06-07	07-08	08-09
<b>Sales (\$M)/Estab.</b>	1.12	1.22	1.29	1.36	1.42	9.1%	6.0%	5.2%	4.9%
<b>Sales (\$) per Emp.</b>	110,198	117,144	124,155	130,567	136,980	6.3%	6.0%	5.2%	4.9%
<b>Emps. per Estab.</b>	10.1	10.4	10.4	10.4	10.4	2.6%	0.0%	0.0%	0.0%

# PLUMBING & HEATING & A/C CONTRACTORS (NAICS 23822)

## SIZE OF FIRM INDUSTRY ESTIMATES

Year	Establishments by Size of Firm									Total
	1-4 Emps.	5-9 Emps.	10-19 Emps.	20-49 Emps.	50-99 Emps.	100-249 Emps.	250-499 Emps.	500+ Emps.	Unknown Emps.	
2006	54,616	18,508	12,021	7,616	2,060	835	147	61	481	96,345
2008	55,155	18,691	12,139	7,691	2,080	843	148	61	486	97,296
2009	55,700	18,876	12,259	7,767	2,101	851	149	62	490	98,257
Year	Sales (\$Millions) by Size of Firm									Total
	1-4 Emps.	5-9 Emps.	10-19 Emps.	20-49 Emps.	50-99 Emps.	100-249 Emps.	250-499 Emps.	500+ Emps.	Unknown Emps.	
2006	9,788	10,366	18,851	29,003	17,303	17,767	7,025	10,946	3,219	124,268
2008	10,395	11,009	20,020	30,802	18,377	18,869	7,461	11,625	3,421	131,978
2009	11,014	11,664	21,211	32,634	19,470	19,991	7,904	12,316	3,626	139,830
Year	Employment by Size of Firm									Total
	1-4 Emps.	5-9 Emps.	10-19 Emps.	20-49 Emps.	50-99 Emps.	100-249 Emps.	250-499 Emps.	500+ Emps.	Unknown Emps.	
2006	109,233	111,051	168,291	243,698	131,821	115,205	46,158	44,799	30,656	1,000,911
2008	110,311	112,147	169,953	246,103	133,123	116,343	46,613	45,241	30,976	1,010,809
2009	111,400	113,254	171,630	248,533	134,437	117,491	47,073	45,687	31,296	1,020,802

## SUB-INDUSTRIES – 2007 INDUSTRY ESTIMATES

Sub-Industries	Total Establishments	Total Employment	Total Sales (\$M)
Plumbing, heating, air-conditioning	13,638	126,824	16,250
Boiler and furnace contractors	325	4,058	864
Boiler maintenance contractor	117	1,754	295
Boiler setting contractor	34	624	103
Heating systems repair and	786	5,532	543
Hydronics heating contractor	44	530	74
Plumbing contractors	31,481	286,570	31,199
Septic system construction	1,818	9,987	850
Sprinkler contractors	923	9,178	2,717
Fire sprinkler system installation	1,401	36,464	4,638
Irrigation sprinkler system installation	1,197	12,577	1,093
Heating and air conditioning contractors	18,749	149,336	14,839
Mechanical contractor	5,903	128,904	22,353
Process piping contractor	97	3,172	437
Solar energy contractor	287	2,179	281
Ventilation and duct work contractor	494	10,313	1,412
Warm air heating and air conditioning	17,781	198,635	24,493
Refrigeration contractor	1,272	14,275	1,825