



Freedonia Focus Reports
US Collection

Manufacturing: United States

July 2018



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Manufactured Goods Trade	7
Global Manufacturing Outlook	10
Environmental & Regulatory Factors	12
3. Segmentation & Forecasts	13
Manufacturer Shipments	13
Transport Equipment	15
Metal & Nonmetallic Mineral Products	16
Electrical & Electronic Products	17
Machinery	19
Other Durable Goods	20
Food & Beverages	20
Petroleum & Coal Products	21
Chemical & Allied Products	23
Plastic & Rubber Products	24
Other Nondurable Goods	25
4. Industry Structure	27
Concentration Ratios for Major Industries	27
Manufacturing Firm Statistics by Major Industry	28
Manufacturing by State & Metropolitan Area	29
5. About This Report	31
Scope & Method	31
Sources	32
Industry Codes	32
Resources	33

List of Tables & Figures

Figure 1 Key Trends in US Manufacturer Shipments, 2017 – 2022	3
Figure 2 US Manufacturer Shipments Nominal Trends, 2007 – 2017	4
Figure 3 US Manufacturer Shipments Nominal & Real Trends, 2007 – 2017	5
Table 1 Key Indicators for US Manufacturer Shipments, 2007 – 2022 (US\$ bil)	6
Figure 4 US Manufactured Goods Trade, 2007 – 2017 (US\$ bil)	7
Table 2 US Manufactured Goods Trade, 2007 – 2017 (US\$ bil)	7
Table 3 US Manufactured Goods Imports by Country, 2007 – 2017 (US\$ bil)	8
Table 4 US Manufactured Goods Exports by Country, 2007 – 2017 (US\$ bil)	8
Figure 5 US Nominal Broad Dollar Index & Manufactured Goods Net Imports, 2007 – 2017	9
Table 5 US Manufactured Goods Imports by Product, 2007 – 2017 (US\$ bil)	9
Table 6 US Manufactured Goods Exports by Product, 2007 – 2017 (US\$ bil)	9
Figure 6 Global Manufacturing Value Added by Region, 2007 – 2022 (2016US\$ bil)	10
Table 7 US Global Manufacturing Value Added by Region, 2007 – 2022 (2016US\$ bil)	10
Figure 7 US Nominal Durable & Nondurable Manufacturer Shipments, 2007 – 2022 (US\$ bil)	13
Table 8 US Nominal Manufacturer Shipments by Industry, 2007 – 2022 (US\$ bil)	13
Figure 8 US Nominal & Real Manufacturer Shipments, 2007 – 2022	14
Table 9 US Real Manufacturer Shipments by Select Industries, 2007 – 2022 (2009US\$ bil)	14
Table 10 Advantages & Disadvantages of Outsourcing Production to Low-Cost Countries	18
Figure 9 US Nominal & Real Petroleum & Coal Shipments, 2007 – 2022	22
Figure 10 US Nominal Durable & Nondurable Manufacturer Shipments, 2007 – 2022 (% of US\$ bil)	26
Figure 11 US Shipments Share of Largest 4 Firms for Major Industries, 2002 – 2012 (%)	27
Figure 12 US Manufacturing Firms, Establishments, & Employment, 2007 – 2016 (000)	28
Table 11 US Manufacturing Firms, Establishments, & Employment by Major Industry, 2007 – 2016 (000)	28
Figure 13 US Manufacturer Shipments for Top 8 States, 2016 (US\$ bil)	29
Table 12 US Manufacturer Shipments for Top 15 States, 2010 – 2016 (US\$ bil)	29
Figure 14 US Manufacturing Establishments for Top 8 Metropolitan Statistical Areas, 2016 (units)	30
Table 13 US Manufacturing Establishments for Top 17 Metropolitan Statistical Areas, 2012 – 2016 (units)	30
Table 14 NAICS & SIC Codes Related to Manufacturing	32

About This Report

Scope & Method

This report forecasts to 2022 US manufacturer shipments in nominal and real (inflation-adjusted) US dollars. Total nominal shipments are segmented by product in terms of:

- transport equipment
- metal and nonmetallic mineral products
- electrical and electronic products
- machinery
- other durable goods such as wood products, medical equipment and supplies, and furniture and fixtures
- food and beverages
- petroleum and coal products
- chemical and allied products
- plastic and rubber products
- other nondurable goods such as pharmaceutical and related products, and paper products

To illustrate historical trends, total nominal and real shipments, the various segments, trade, and the broad dollar index are provided in annual series from 2007 to 2017.

This report includes both final products and interim components of those final products. Thus, total and segment values are subject to various degrees of double-counting. Re-exports of manufactured goods are excluded from demand and trade figures.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Manufacturing: United States (FF70032) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 14 | NAICS & SIC Codes Related to Manufacturing

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
31-33	Manufacturing	20-39	Manufacturing

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Global Motorcycles, May 2018

Global Plastics Processing Machinery, January 2018

Global Housing Outlook, October 2017

Global Food Processing Machinery, September 2017

Global Construction Machinery Market, August 2017

Texas Oil & Gas Drilling Outlook, April 2017

Freedonia Focus Reports

Civil Aircraft: United States

Construction: United States

Demographics: United States

Freight Services: United States

Global Demographics

Housing: United States

Macroeconomy: United States

Motor Vehicles: United States

Processed Food: United States

Shipbuilding: United States

Transport Equipment: United States

World Macroeconomy

Freedonia Custom Research

Trade Publications

American Metal Market

Automotive News

EE Times

Design News

Food Processing

IHS Chemical Week

IndustryWeek

Manufacturing.net

Oil & Gas Journal

Agencies & Associations

Alliance for American Manufacturing

Alliance of Automobile Manufacturers

About This Report

American Chemistry Council
International Monetary Fund
National Association of Manufacturers
Organisation for Economic Co-operation and Development
United States Department of Commerce
 Bureau of Economic Analysis
 United States Census Bureau
United States Department of Labor
 Bureau of Labor Statistics
 Occupational Safety and Health Administration
United States Environmental Protection Agency
United States Food and Drug Administration
United States International Trade Commission
World Bank